7th ANNUAL

CSLS

Canadian Sponsorship Landscape Study

August 2013

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Research Partners

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SMCC
Sponsorship Marketing Council of Canada
Conseil canadien sur la commandite

CANADIAN SPONSORSHIP FORUM

Welcome to 2013!

Sponsorship in Canada is maturing:

- There is 7 years of data to prove it!
- 2,500 + respondents
- Evolving methods and questions

The purpose of the CSLS:

- Is to respond to an expressed industry need and conduct a survey of Canadian sponsors, sponsees (properties) and agencies to provide an overview of the sponsorship industry in Canada.

CSLS
Canadian Sponsorship Landscape Study

AUTHORS

Dr. Norm O'Reilly, Lead Researcher

Norm O'Reilly is an accomplished scholar and active business professional. He is full-time, tenured professor at the University of Ottawa's Faculty of Health Sciences, specializing in sport business. Norm is also a minority owner and Senior Advisor with TrojanOne. As an advisor, he is involved with the sponsorship and marketing consulting team at TrojanOne where his projects include sponsorship audits, evaluations, and revenue generation modeling. Previous clients have included the Canadian Paralympic Committee, Athletics Alberta, Carleton University, City of Calgary, Nike and Speed Skating Canada.

Prior to joining to the University of Ottawa, he previously taught at the David Falk Center for Sport Management at Syracuse University, the Graduate School of Business at Stanford University, the School of Sports Administration at Laurentian University where he also served as a former School Director and Director of the Institute for Sport Marketing, and the Ted Rogers School of Management at Ryerson University. Dr. O'Reilly is an active researcher and he has published 5 books, over 50 articles in refereed management journals and more than 100 conference proceedings and case studies in the areas of sport management, tourism marketing, marketing, risk management, sport finance, and social marketing. He is the former North American Editor of the Journal of Sponsorship and sits on the editorial boards of the International Journal of Sport Finance, the International Journal of Sport Communications, and is a Regional Editor for the Sport, Business, and Management Journal.

Norm has considerable experience as a volunteer Board Member and Executive Board Member of multiple organizations (including the Canadian Olympic Committee, Diving Canada and Triathlon Canada), employee, and consultant. Prior to joining academia, Norm had involvement as an administrator, including Senior Policy Officer at Sport Canada, Team Manager & Office Manager at Triathlon Canada, and Event Manager for the 2008 Toronto Olympic Bid. He has been a member of the 2004, 2008 and 2010 Mission Staff for the Canadian Olympic Committee at the Olympic Games.

Elisa Beselt, Researcher

Elisa is a key member of TrojanOne's Consulting team. With a Master of Human Kinetics degree specializing in sport management from the University of Ottawa as well as a Bachelor of Physical and Health Education and Bachelor of Arts degrees from Queen's University, Elisa has a strong background of research, analysis and strategy development.

She has been the lead analyst on some of the Consulting team's largest projects, including research into sport participation patterns for Nike, a review of the grassroots and community sport corporate partnership landscape for Esso, and a revenue generation analysis and strategy development for the National Capital Commission. Her expertise in sport has also extended to other sport organizations, including projects with Ringette Canada, Ottawa Sports and Entertainment Group and the Ultimate Fighting Championship.

Prior to joining TrojanOne, Elisa was involved with Skate Canada where she analyzed and reported on the economic impact of various domestic and international figure skating events as well as developed event hosting guides for local organizing committees.

ACKNOWLEDGEMENTS

Thank You

The authors would like to sincerely thank the following people for their contributions:

- Each respondent of the survey for taking the time to provide us with the data needed to complete such a study
- Ishita Chadha, Rosanne Leung and Mark Harrison as the organizing team of the Canada Sponsorship Forum
- All 2013 Canadian Sponsorship Forum delegates
- Don Mayo, Ivan Mutabdzic and Marissa Potts at IMI International
- Susan Charles, Randy Scotland and Paul Hetu at the Sponsorship and Marketing Council of Canada
- Mark Sabourin at the Sponsorship Report
- Adam DeGrasse and Erin Switzer at TrojanOne
- Dr. Twan Huybers at the University of New South Wales, Australia

REPORT

1 **CSLS**
About, History & Method

2 **7th Annual Results**
Findings, Trends & What's to Come

3 **Sponsorship in 2013**
Key Lessons from CSLS

CSLS
Canadian Sponsorship Landscape Study

7th CSLS

The Canadian Sponsorship Landscape Study (CSLS) is an annual survey of Canadian sponsors, sponsees and agencies to provide an overview of the sponsorship industry in Canada.

The study examines both academic and industry resources to provide information that is relevant for the sponsorship sector in Canada. Data is collected anonymously and ethically through a secure website. Over the years, the study has engaged several partners, including the Canadian Sponsorship Forum and the Sponsorship Marketing Council of Canada, where the findings are regularly presented at annual conferences, as well as IMI International, the University of Ottawa and TrojanOne as key research partners.

In order to serve its purpose and ensure the findings are readily available and can be applied broadly, the survey report is publicly available.

Please note that all amounts presented in this report are in Canadian dollars, unless indicated otherwise.

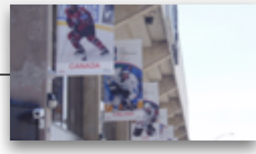
1 CSLS

About, History & Method

HISTORY

2007
Toronto International Film Festival, Toronto

Canadian Sponsorship Forum

2008


World Hockey Championships, Halifax

Canadian Sponsorship Forum

2009


Quebec Winter Carnival, Quebec

Canadian Sponsorship Forum

2010


Paralympics, Vancouver

Canadian Sponsorship Forum

2011


Formula One, Montreal

Canadian Sponsorship Forum

2012


Just for Laughs, Montreal

Canadian Sponsorship Forum

2010
Creating Opportunities, Toronto

Sponsorship Marketing Council of Canada

2011
Upping the Ante, Toronto

Sponsorship Marketing Council of Canada

2012
Trailblazing, Toronto

Sponsorship Marketing Council of Canada

2013

CSTA Sport Event Congress | April 8-10
Women & Sponsorship

SMCC Sponsorship Revolution | April 25
Initial Findings (Sponsor-Only)

CSF Building Community | May 24-27
Full Results, Presentation & Roundtable

SMCC Western Sponsorship Congress | October 22-23
Results

Infopresse RDV Commandite | October 24
Results in French

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Background

2013 marks the seventh annual CSLS. The study began in 2007 as a way to meet the several needs within the Canadian sponsorship industry.

First, following the 2006 Canadian Sponsorship Forum, many delegates, including key sponsorship professionals, noted that the support for sponsorship as a marketing tactic was predominantly anecdotal and there was a need for evidence to support and enhance recommendations for best practices regarding sponsorship in Canada.

Additionally, during this time there was a push within academia to formalize the field of research and provided academic literature on sponsorship, especially with regards to its professional application. Finally, anecdotal disconnect within the industry, often between sponsors and sponsees (also referred to as properties), created the need for evidentiary support. The Canadian Sponsorship Landscape Study was born out of all of these needs in 2007 and and continues to meet these demands today.

Timeline

Since the study's inception in 2007, the findings have been presented at key industry gatherings on an annual basis. The CSLS will be formally presented five times in 2013.

HISTORY

2006 Learnings

Sponsors

- Sponsors spent 16.7% of marketing budgets on sponsorship
- Sport captured a significant percentage of sponsorship spending at 53%
- More than 52% reported not investing at all in sponsorship evaluation and only 27% reported using ROI methods as part of their evaluation
- Sponsorship evaluation was 7.8% of sponsorship budget
- The activation ratio was 0.42 to 1
- The industry size was estimated at $1.1 billion

Sponsees

- The sponsorship revenue reported in 2006 was almost twice that of 2005
- 42.3% of sponsees reported not investing anything in leveraging activities, while 52% indicated that the invest on average 10% or more of their sponsorship revenue in leveraging

Agencies

- When agencies were used by sponsors and/or sponsees, evaluation and leveraging activities were significantly more likely to happen

2007 Learnings

Sponsors

- Sponsors spent 15.5% of their marketing budget on sponsorship
- 39% of sponsors expected more sponsorship spending in 2008
- Sponsorship evaluation was 4.5% of sponsorship budget
- The activation ratio was 0.46 to 1
- The industry size was estimated at $1.22 billion (9.8% increase from 2006)

Sponsees

- 21.3% of sponsees did not leverage or activate
- 64% expected an increase in 2008 sponsorship revenue
  - Average increase of 57%

Agencies

- Sponsorship was a large component of revenues and was growing
- When an agency was involved, sponsorship, leveraging and evaluation were much more likely to occur

2008 Learnings

Sponsors

- Immense opportunities identified in the not-for-profit sector, which represented $713 million sponsorship spending
- Sponsor expected sponsorship in 2009 to decline
- The external influence is important: there was particular concern regarding Vancouver 2010 and the economic crisis
- The activation ratio was 0.71 to 1
- The industry size was estimated at $1.28 billion (considerable growth from 2007)

Sponsees

- Immense opportunities in not-for-profit sector, which represented $713 million in sponsorship spending
- Sponsees expected growth in future sponsorship revenue

Agencies

- Immense opportunities in not-for-profit sector, which represented $713 million in sponsorship spending
- Agencies to not expect much change in sponsorship billings in 2009
- Agencies continued to use a sophisticated approach - they activated at a ratio of 1.5 to 1 and 74.9% of sponsorships that were worked on by agencies were evaluated

HISTORY

2009 Learnings

Sponsors

- Sponsorship spending 'survived' the economic crisis
- Sponsorship spending remained stable within marketing communication budgets
- When forecasting 2010, sponsors were cautious
- Investment in evaluation declined
- Sport was the most dominant area of sponsorship spending
- In-kind sponsorship was becoming more popular, especially for very large sponsors
- The industry size was estimated at $1.43 billion (2.9% increase from 2008)

Sponsees

- When forecasting 2010, sponsees were optimistic
- Respondents considered ambush legislation around the 2010 Olympic Games unnecessary
- Sponsees were under-servicing sponsors in all key areas

Agencies

- Sponsorships were 'smarter' when agencies were involved - more activation and evaluation
- People in the industry were very worried about the economy, human resources, ROI and activation

2010 Learnings

Sponsors

- 43.5% of sponsors expected their sponsorship budget (rights fees and activation) to remain the same for 2011
- 41% stated that ROI from sponsorship has decreased or remained the same.
- Satisfaction (i.e., very satisfied and satisfied) with their sponsorship increased marginally from 41.5% in 2009 to 45.7% in 2010

Sponsees

- The vast majority of Canadian sponsees have small to moderate amounts of sponsorship revenue
- Not-for-profit sponsees accounted for 83.7% of sponsees in the study
- The average amount of cash sponsorship that a not-for-profit sponsee received annually was $1.45 million, with an average of $37,292 per sponsorship

Agencies

- Over 75% of all study respondents did not use an agency for sponsorship
- The mean annual billings for sponsorships work was $2,410,446
- The activation ratio when an agency was involved was 0.89:1 compared to 0.62:1 overall

2011 Learnings

Sponsors

- Sponsors localized and targeted their spending, with 73.1% of spending focused on the province, region, or local community
- Tied with Professional Sport, the Festival, Fair, and Annual Event category had the most number of single largest sponsorship rights fees, with 57.1% of sponsors investing here to reach communities and rural populations
- For the first time in CSLS history, there is a month that appears to be more popular in establishing sponsorship decisions - October

Sponsees

- Sponsees saw an average 9.2% growth in sponsorship revenue, yet overall, they expected a 44.9% increase
- Approximately one third of sponsorship revenue was value-in-kind product or services
- An average of only 16.4% in additional investment was used to leverage, service, and/or activate sponsorship above the rights fee, with a slight increase for French sponsees

Agencies

- Billing increased 14.4%, with slightly higher growth for French agencies of 17.3%
- Most common categories of sponsorship billings were in Sport and Festival, Fairs, and Annual Event Categories, consistent with trends in sponsor spending

PARTNERS

Reports, Decks & Participation at: www.sponsorshiplandscape.ca
www.sondagecommandite.ca

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Partners

Since 2007, the group responsible for carrying out the study on the sponsorship industry in Canada has gained momentum. During the first year, the group brought together members of the University of Ottawa, Ryerson University and the Institute for Sport Marketing. Two years later, the Sponsorship and Marketing Council of Canada joined the team as co-presenter of the study. In 2013, the partners of the study are listed below.

IMI

As a leading market research firm, IMI supports the CSLS through the provision of a secure website that allowed for survey administration, data collection and storage.

uOttawa

Lead CSLS investigator Dr. Norm O'Reilly is an associate professor in the School of Human Kinetics in the Faculty of Health Sciences.

TrojanOne

An agency proficient in leveraging the passions of consumers to create brand experiences. We've built a reputation for developing ownable properties and ideas that engage consumers and bring brands to life.

SMCC

As the Canadian sponsorship marketing industry's pivotal organization, the SMCC's mission is to help advertisers drive maximum returns on sponsorship marketing investments.

CSF

The Canadian Sponsorship Forum (CSF) debuted in 2005 and delivers best-in-class sponsorship data and information in partnership with the most successful Canadian sponsorship properties.

METHOD

Design

Triangulation, Industry, Canada

Recruitment

E-mail, Social Media, Database

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Data Collection

In 2013, data collection was completed online, through a secure website provided by IMI International. An option to complete the survey offline was also provided, where paper responses could be mailed to the researchers. Most respondents chose to provide their information via the secure online site, but the paper option was also somewhat popular.

Procedures

The study included three bilingual surveys: one for each of sponsors, sponsees and agencies. Although they share some common questions, specific questions were developed for each of the three groups of partners (sponsors, sponsees and agencies).

The questions for each survey were initially developed based on a literature review, consultation with delegates from the initial Canadian Sponsorship Forum and the expertise of the researchers. They were originally approved by the ethics board at Laurentian University in 2007 and were approved a university each year of the study. In 2013, they were approved by the University of Ottawa board of ethics.

In subsequent years, questions have been modified, adapted and added based upon the feedback from survey respondents and other partners.

METHOD

Process
Snowball, Online, Database, Social Media

Analysis
Best-Worst Scaling, Trend, Comparative, Estimation

Analysis

The results from the surveys were compiled and analyzed for various themes offering insight into the sponsorship industry in Canada. Several open-ended questions were asked of respondents in all three groups. Answers were examined and common responses were grouped to develop themes. For data specific to sponsors, sponsees and agencies, descriptive statistics, correlations and difference of means (i.e., t-tests) were completed to explain the data.

Recruitment

An important procedural element of the CSLS, particularly the inaugural version was to recruit respondents. In the first year, email blasts as well as more than 15,000 phone calls to databases of sponsors and agencies were undertaken. In the years since, the survey has moved to an online model where previous years' respondents, relevant databases, partner email blasts (e.g., SMCC, the Sponsorship Report, The Partnership Group, AthletesCAN, etc.) and word of mouth. In general, response rates were pursued via a recruitment plan which involved databases, leveraging industry contacts, experts and phone survey.

A number of data sources that could attract any of sponsors, sponsees and agencies were used, including:

- E-mail requests to the alumni of the universities associated with the study,
- E-mail requests to past participants of the Canadian Sponsorship Forum,
- E-mail requests to all SMCC members and the SMCC database, including SMCC conference attendees,
- Scripted emails to former Canadian Sponsorship Forum speakers and contacts,
- Scripted emails to key contacts of the researchers, and
- Mentions by the Canadian Sponsorship Forum Sales Team and the SMCC Conference Sales Team during sales calls.

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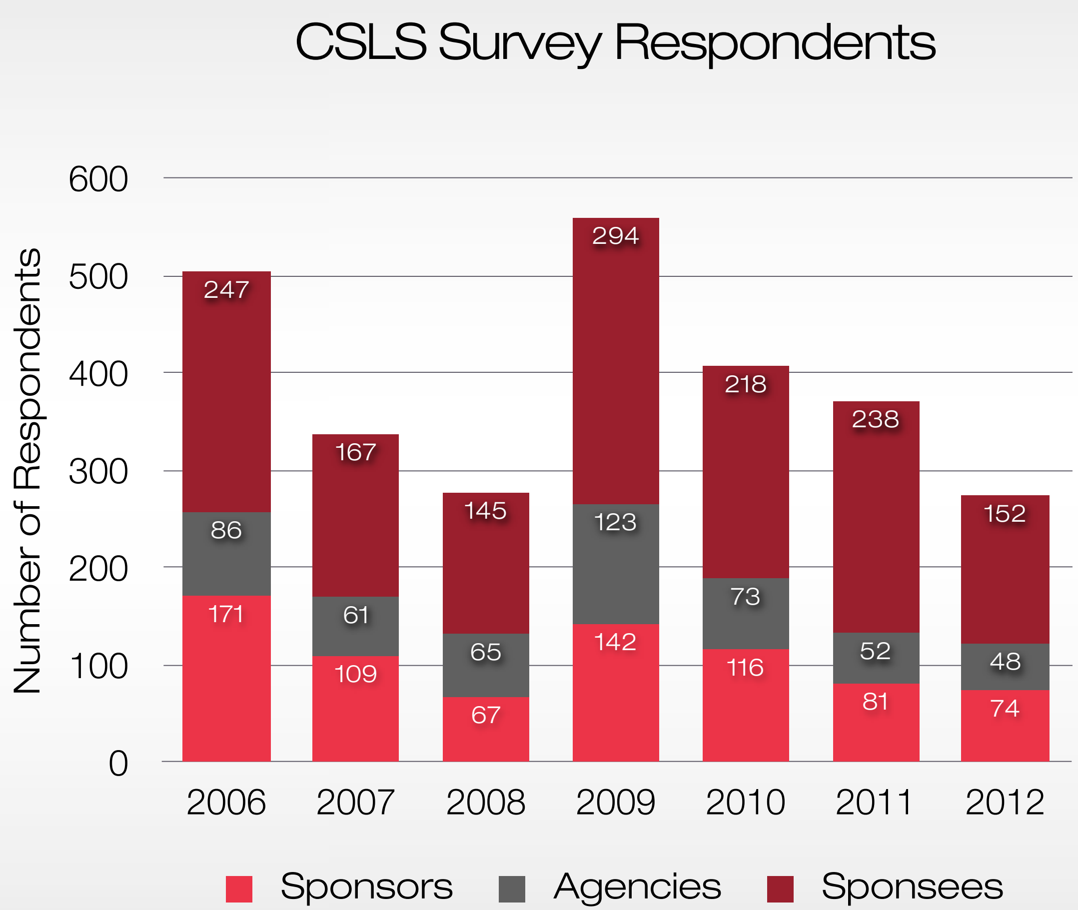
2

7th Annual

Findings, Trends & What's Next

RESPONDENTS



274 Responses

74 Sponsors
152 Sponsees
48 Agencies

About

49.6% For-Profit
50.4% Not-For-Profit
74.3% English
25.7% French

Sample Size

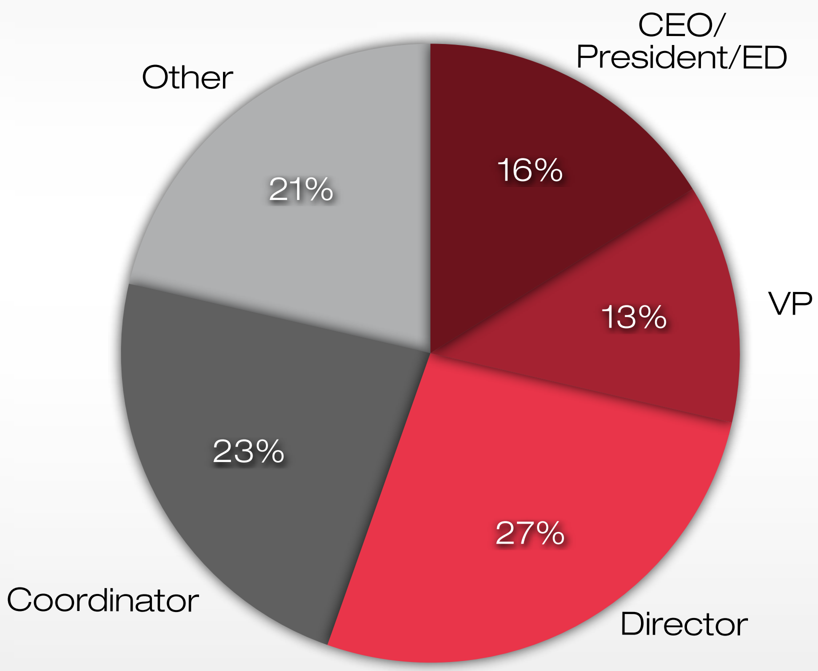
Over the seven years of the study, the CSLS has received over 2,500 responses. As such, the study continues to strengthen and expand the longitudinal findings are becoming more robust, allowing for key insights.

Language

The CSLS surveys have been available in both English and French since the inception of the study. In 2012, nearly three quarters of the respondents chose to answer in English.

RESPONDENTS

Position in Organization



Details

65.2% Respondent Time on Sponsorship
5.6 Staff in Organization on Sponsorship
37.7% Are Women

Primary Decision Maker

18.5% CEO
35.5% VP
41.0% Director/Manager
4.0% Other
29.8% Are Women

Time

Respondents to the survey devoted a significant amount of their time to sponsorship - an average of 65.2%. This is significantly greater than the 50.6% reported in 2011.

Women

In this year's CSLS the in depth focus was on women in sponsorship and particular questions were added about women in sponsorship. Overall, 37.7% of the people working in sponsorship were women and 29.8 percent of the primary decision maker in the respondent organizations were women.

Respondent

Survey respondents were experts in their field, with over 50% identifying as CEO, Presidents, ED, VP or Directors. As such, they were able to provide the greatest accuracy possible and enhanced the results of the study.

Sponsors

n=74

ABOUT THE SPONSORS

Range in size from **33** staff to **35,000** employees.

72.4%
have a community level focus

50% of sponsorship decisions are made in September and October

4.8%
have women as the primary target market

Investment mix:

69.2% Cash
15.5% In-kind Product
15.3% In-kind Service

49.5% For-Profit
50.5% Not-For-Profit

16.9% of sponsorship marketing budgets invested through an agency

2013 Sponsor Respondents (n = 74)

15.0% of sponsorship marketing budgets invested in a mega-event

Annual budgets range from **$12MM** to **<$1B**

Average sized rights fee **$82,819.23**

Average # of Sponsorship: **41.8** (range 1 to 390)

Average total sponsorship investment **$3,461,843**

17.2%
of sponsorship investments targeted women

Positive outlook:
0% decrease
31% increase
69% same

Profile

The sponsors that responded to the survey were very diverse in size, with a few dozen up to tens of thousands of staff with annual budgets from several million to nearly a billion dollars.

On average they had just under 42 sponsors (down dramatically from 100 in 2011) with nearly 70% of sponsorship money spend as cash and the remainder split evenly between value-in-kind product and service.

Sponsors made sponsorship decisions year round, however like in the previous year, sponsors tended to make significantly more decisions in the fall - with over 50% of sponsorship decisions made in September and October.

Nearly 17% of the sponsorship spending goes through an agency, 15.0% of spend goes towards mega events and 17.2% of sponsorship spend was targeted specifically to women. In contrast, under 5% of the number of sponsorships were targeted primarily toward women.

The average sized single sponsorship rights fee paid by a sponsor is $82,819. The average total sponsorship investment by a sponsor is $3,461,843.

Finally, over 70% of sponsors had a community level focus.

Sponsees

n=152

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ABOUT THE SPONSEES

Range in size from **0** staff to **750** employees.

Average # of Sponsorship Categories:
15.7 (range 1 to 100)

6.3% of sponsors were primarily targeting women

Sponsee Reach:

10.4% International
39.6% Canada
2.1% Multi-Province
22.9% Provincial
10.4% Regional
14.6% Local

14.1% average activation (investment of sponsorship revenue as activaton)

2013 Sponsee Respondents (n = 152)

4.1% of sponsors are located "fully outside of Canada" and **13.0%** have HQ outside of Canada

Annual budgets range from **$10K** to **$350M**

53.5% of sponsorship staff were women

66.3% of sponsorship volunteers were women

3.2% Of revenues were used to pay for agencies

$2,481,786 average sponsorship revenue

Sponsorship revenue range from **$5K** to **$30M**

Profile

The sponsees (properties) that responded to the survey were very diverse in size, where some had no paid staff whereas others had up to several hundred staff. Their budgets were very diverse in size, ranging from several thousand to hundreds of millions of dollars.

On average, the properties filled 15.7 different sponsorship categories. The average sponsorship revenue per sponsee was nearly $2.5 million, which was an extremely modest 0.93% decrease from 2011.

On average, 14.1% of sponsorship revenue was invested in activation and 3.2% were used to pay for agencies.

Over half of sponsorship staff were women and two-thirds of sponsorship volunteers were women. Additionally, women were the primary target markets of 6.3% of sponsors.

Sponsees tended to have an evenly distributed reach, with 47.9% a local to provincial reach and 50.0% a international or national reach. Additionally, most sponsees that responded had headquarters in Canada.

Agencies

n=48

ABOUT THE AGENCIES

Range in size from 1 staff to 2,000 employees.

68.8% of total agency billings from sponsorship

Number of Sponsorship Clients: 9.7 (range 1 to 25)

Average % of Canadian sponsor billings spent on:

Canadian properties 86.6%

Global properties 13.2%

2013 Agency Respondents (n = 48)

$100,250 average billing per sponsorship client

Range in billings from $10K to $400K

Agency Reach:

33.3% International
33.3% Canada
10.7% Multi-Province
15.9% Provincial
6.7% Regional

21.7 average # of sponsorships worked on in 2012

Agency Types:

59.1% Sponsorship
21.6% Various Other
10.2% Research Agencies
5.8% Event Management
3.2% Advertising

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Profile

Respondents were asked to identify what type of agency best described them and the work that they do. Nearly 60% considered themselves sponsorship agencies, with the remainder made up of research, event management, advertising and other.

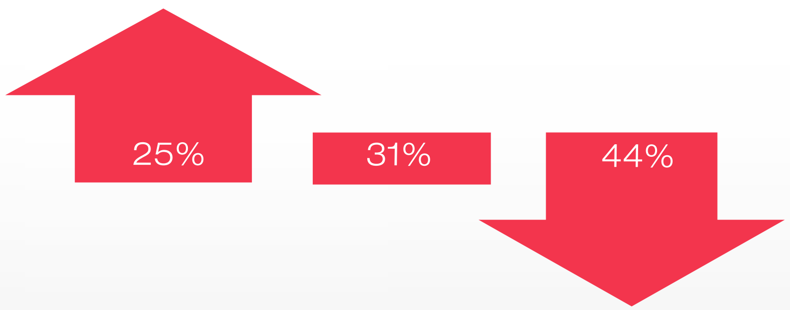
Among this sample, 68.8% of agency billings came from sponsorship. Average billings per client was just over $100,000. Agencies worked on an average of 21.7 sponsorship and had an average of 9.7 sponsorship clients.

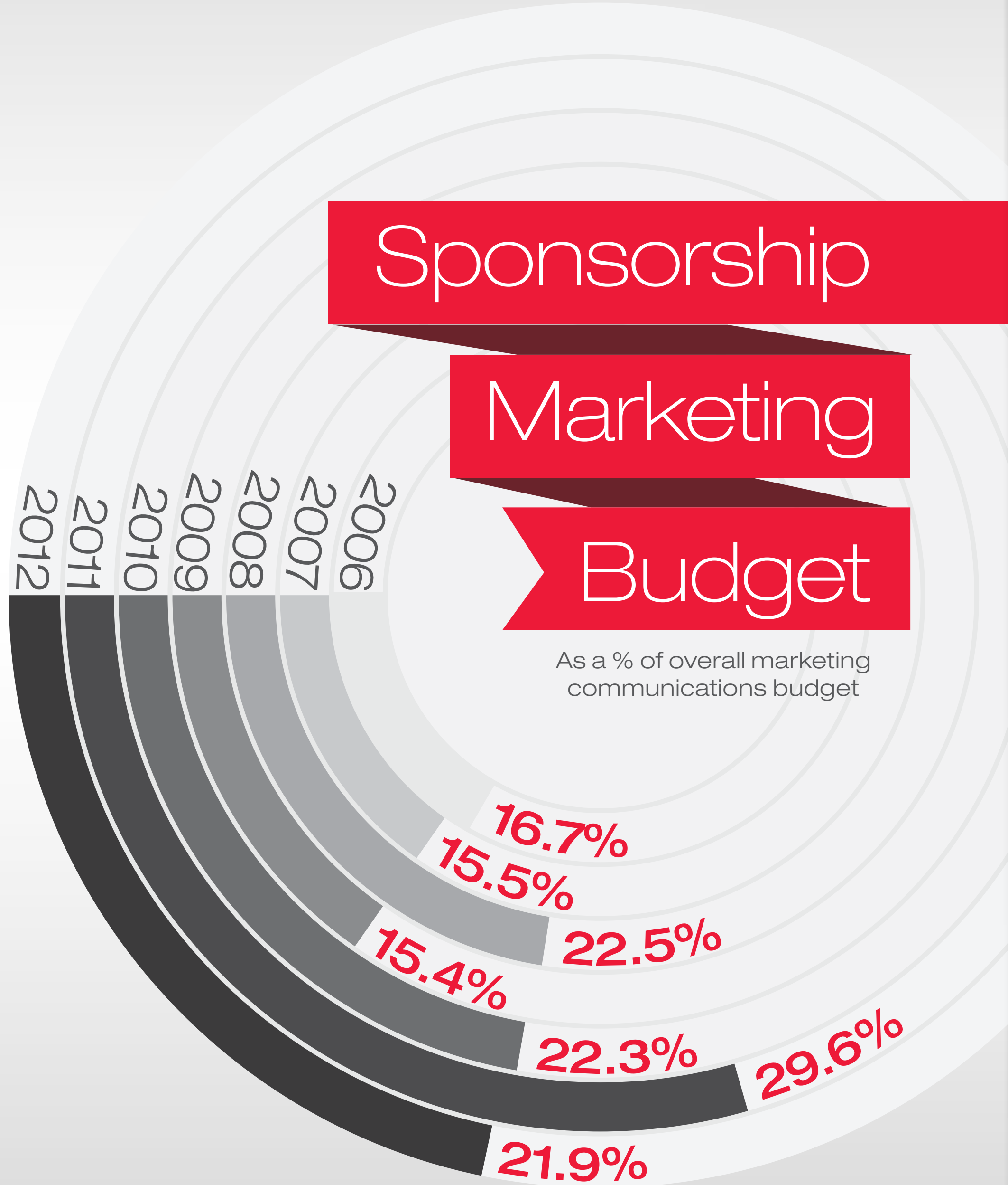
About two-thirds of the agencies had a national or international reach. Canadian sponsor billings tended to go towards Canadian properties, although 13.2% went towards global properties.

Investment Results

SPONSORS BUDGET

Expected Change for 2013





Findings

One of the key measures of the value of sponsorship is to examine the overall ratio of spending on sponsorship as a percentage of sponsor's overall marketing communications budgets. In 2012, sponsorship accounted for over one in five marketing communications dollars.

This percentage fluctuated over the seven years of the study (the percentage is calculated on a combination of actual data, ranges and tiers of data, so some error exists), however what has remained consistent is that it continues to be a critical tool in the marketing communications mix.

Expectations

Most sponsors expected that this percentage will stay the same or decline in 2013, although about 25 % expected an increase.

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INDUSTRY SIZE

Industry Size

INDUSTRY SPENDING
+41%

2012 **$1.57B**

2011 **$1.59B**

2010 **$1.55B**

2009 **$1.43B**

2008 **$1.39B**

2007 **$1.22B**

2006 **$1.11B**

Modest Outlook

21.4% Increase (by 7.7%)

35.7% Decrease (by 27.0%)

42.9% Stay the Same

2013 IEG Projections

$19.9B North American Sponsorship Spending (↑ 5.5%)

$53.3B Global Sponsorship Spending (↑4.2%)

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Findings

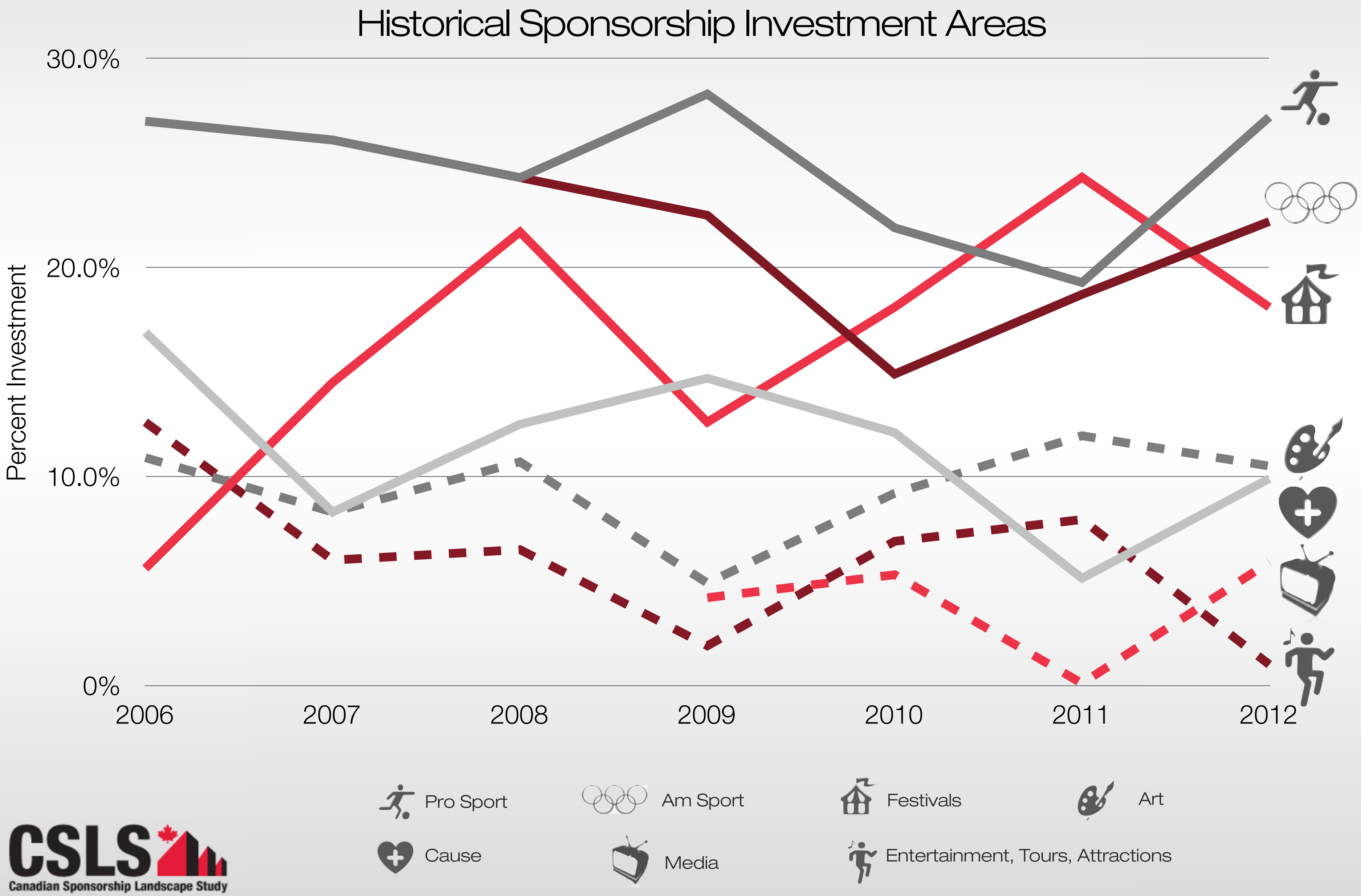
Conservative estimates indicate that the sponsorship industry in Canada in 2012 was $1.57 B. This was a slight decrease over the previous year.

In 2013, IEG expected a slight increase in both North American and global sponsorship spending.

Expectations

Additionally, Canadian sponsorship industry professionals have a modest outlook for next year, with several expected a modest increase, even more expected a substantial decrease and just under half expecting the industry size to remain relatively the same.

SPONSORSHIP MIX



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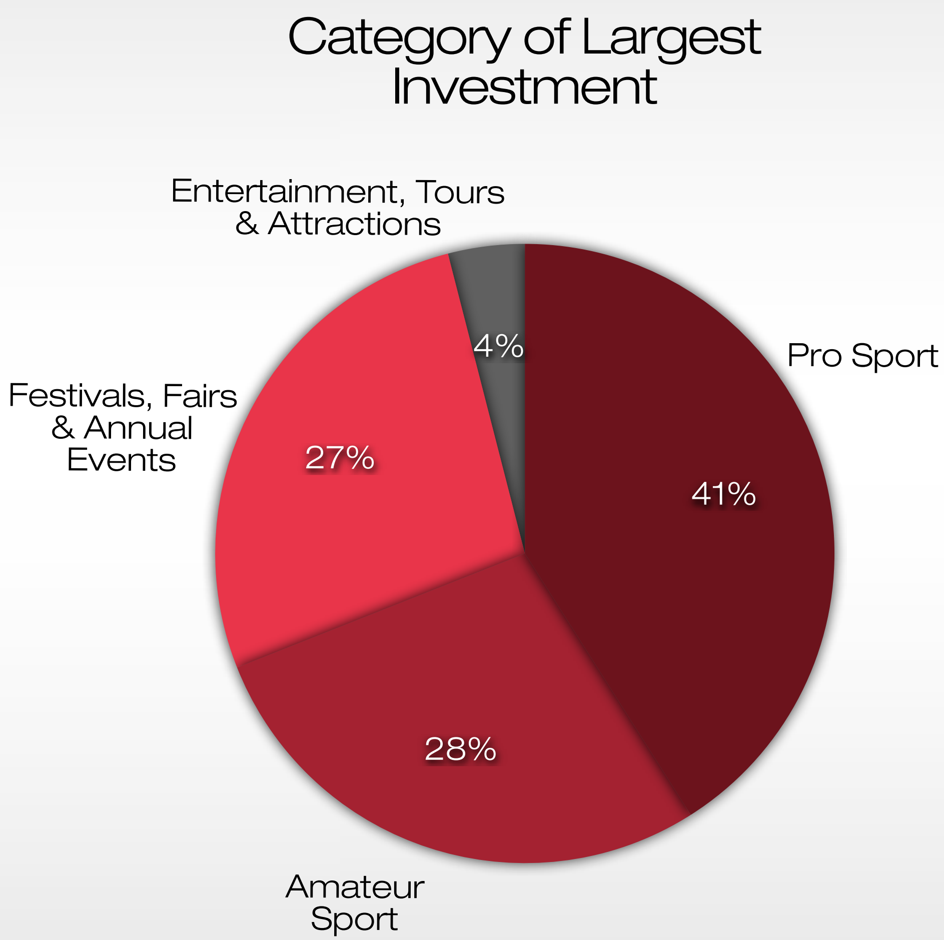
Findings

Since the study began seven years ago, the percentage of sponsorship spending by area of investment (i.e., property type) has undergone appreciable change. While sport sponsorships (both professional and amateur) have remained fairly steady, festivals, fairs and annual events have been growing and cause marketing has been falling.

For exact historical percentages and the dollar amount per investment area, please refer to the Appendix A.

Note: Prior to 2009, sport was not differentiated by professional or amateur/Olympic, so an even split is assumed for those years.

LARGEST INVESTMENT



In Depth

$1,055,000 Average Size

$15K to $4.5M Range

0 Identified as arts, naming rights, education or conferences

Findings

Sponsors were asked to describe their single biggest sponsorship investment in 2012. Two-thirds of these were in sport (professional or amateur/Olympic sport) and 27% were in festivals, fairs and annual events.

The average size of the single largest sponsorship was just over $1 million, which was a slight decline from 2011 when the average size was $1,262,020.

Overall, arts, naming rights, education or conferenced did not have a single largest sponsorship investment.

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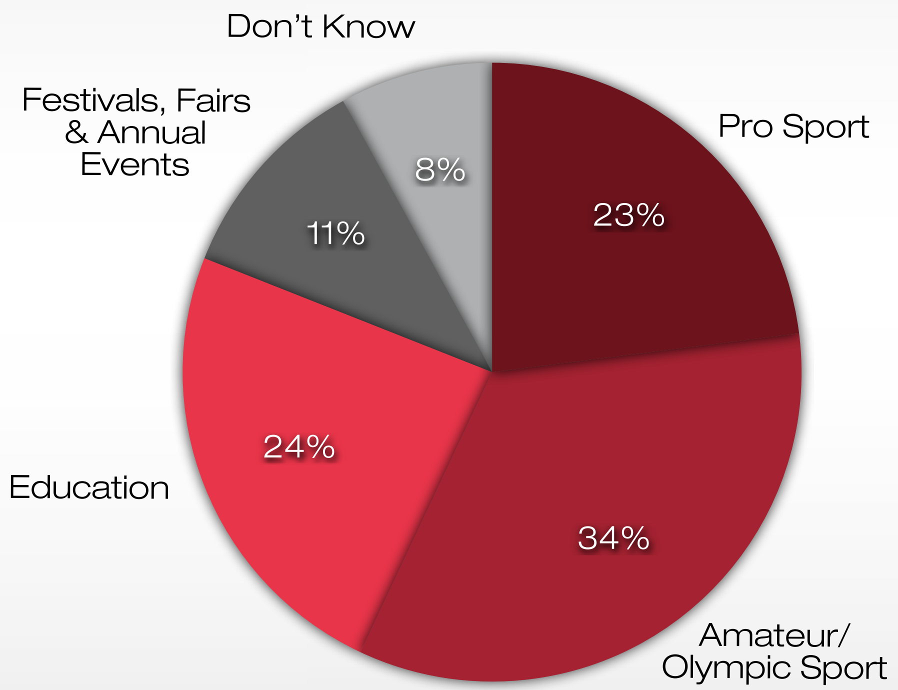
COMMUNITY

KEY

Categories That Best Build Your Community



Community Focus

48.2% Of Sponsorships Worked on had a Community Based Objective (Agency Clients)

30.3 (of 41.8) Sponsorships with a Community Level Objective

72.5% Of Sponsorships Invested in had a Community Level Objective

Findings

The 7th CSLS took an in-depth look at community and found some key insights.

Sponsors were asked which category best builds your community. They reported that amateur/ Olympic sport was the best category, followed by education and pro sport.

Additionally, 72.5% of sponsorships had specific objectives at the community level.

Finally, nearly half of all sponsorships worked on by agencies had a community based objective.

COMMUNITY

KEY

International **1.0%**

National **37.5%**

Multi-Provincial **5.5%**

Provincial **11.7%**

Regional **15.6%**

Local **28.7%**

Findings

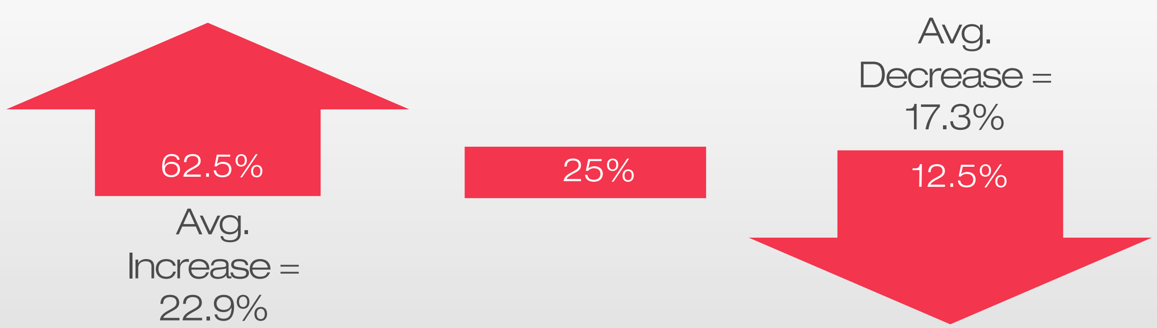
Sponsors were asked what percentage of their overall sponsorship budgets gets designated to each of the following areas. Overall, sponsors were focused on spending in a specific regional or local area (44.3%) or nationally (37.5%).

SPONSEE REVENUE

Cash vs. Value-In-Kind Revenue

Revenue Type	2011 Average	2012 Average	Difference	2012 Range
Cash	$2,505,054	$2,481,786	-$23,268	$0 to $30M
In-Kind	$312,477	$367,500	$55,023	$0 to $3M

Expectations (Cash) for Next Year



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Findings

In 2012, sponsees received an average of just under $2.5 million in cash sponsorship and $367,500 in value-in-kind sponsorship revenue.

As in previous years, most sponsees received a modest amount of sponsorship revenue and a select few received extremely large amounts (e.g., greater than $1 million).

Expectations

Most respondents expected that cash revenue would increase in 2013, at an average of 22.9%. A select few predicted a decrease, at an average of 17.5%.

SPONSEE KEY CATEGORY

18% Telecom

14% Financial Services

8% Oil & Gas

6% Beer

6% Athletic Apparel

4% Automobile

4% Lottery

4% Energy

4% Pharma

4% CPG

4% Food

2% Developers

2% Agriculture

2% Retail

CSLS
Canadian Sponsorship Landscape Study

Findings

Sponsees were asked what cateogry their most important sponsor was from. That is, what sposnor would they least like to lose.

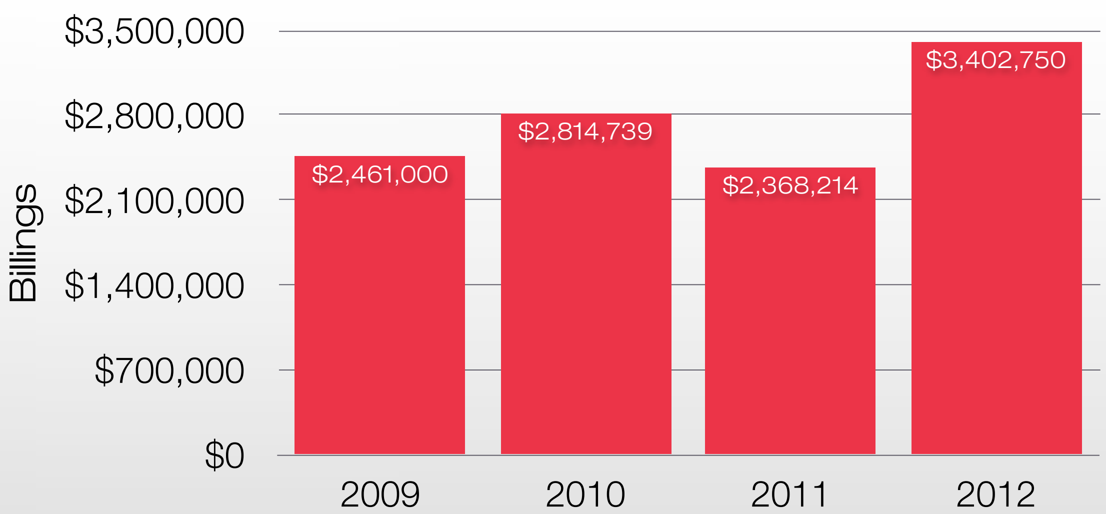
The top two, by a considerable margin, were from telecommunications and financial services sector. The remainder were distributed fairly evenly, with not one single category standing out beyond those two.

AGENCY BILLINGS

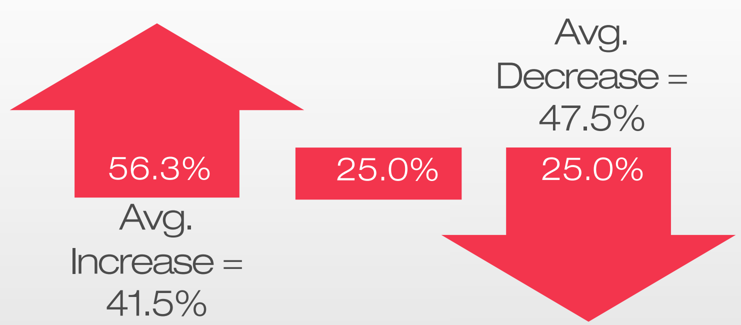
Average Sponsorship Billings

Billings	2011 Average	2012 Average	Change	2012 Range
Sponsorship	$2,368,214	$3,402,750	$1,034,536	$5,000 to $27.5M

Historical Sponsorship Billings



Expectations for Next Year



CSLS
Canadian Sponsorship Landscape Study

Findings

In 2012, agencies reported an average annual billing of $3.4 million. This was a considerable jump from the three previous years.

Expectations

Most respondents expected that billings would increase in 2013, at an average of 41.5%. A select few predicted a decrease, at an average of 47.5%.

AGENCY BILLINGS

By Sponsorship Category

37.0% Sport

17.1% Festivals

14.0% Cause

11.9% Arts

13.4% Others

6.5% Entertainment

Findings

Agencies had an average total annual sponsorship billing of $3.4 million and the average size of each sponsorship billing per client was $100,250.

The most popular category for billings was in sport, followed by festivals and causes. This was similar to 2011, although the percentages went down, apparently due to an increase in billings in other cateogries (e.g., arts, others).

Overall, sport billed $1,259,018, festivals, fairs and annual events billed $581,870 and causes billed $476,385.

AGENCY BILLINGS

Areas of Sponsorship Billing

Area	2011	2012	Difference
Activation Programs	17.9%	20.7%	2.8%
Sponsorship Sales	20.5%	20.3%	-0.2%
Sponsorship Evaluation	7.6%	21.1%	13.5%
Sponsorship Research	3.8%	14.8%	11.0%
Contracts/Negotiation	8.7%	9.1%	0.4%
Other	13.1%	6.4%	-6.7%
Media	7.6%	5.2%	-2.4%
Event Management	10.6%	1.6%	-9.0%
Hospitality	10.2%	0.5%	-9.7%

Others: Development of strategic community investment plans, mentoring, strategy, social media, consulting, and training/education

Findings

Agencies were asked to report what type of work they did for their clients and what percent of the overall billings did this work account for. The percentages reported here represent the total billings by all agencies in that area of work.

For example, 20.7% of total billings were in the area of activation programs.

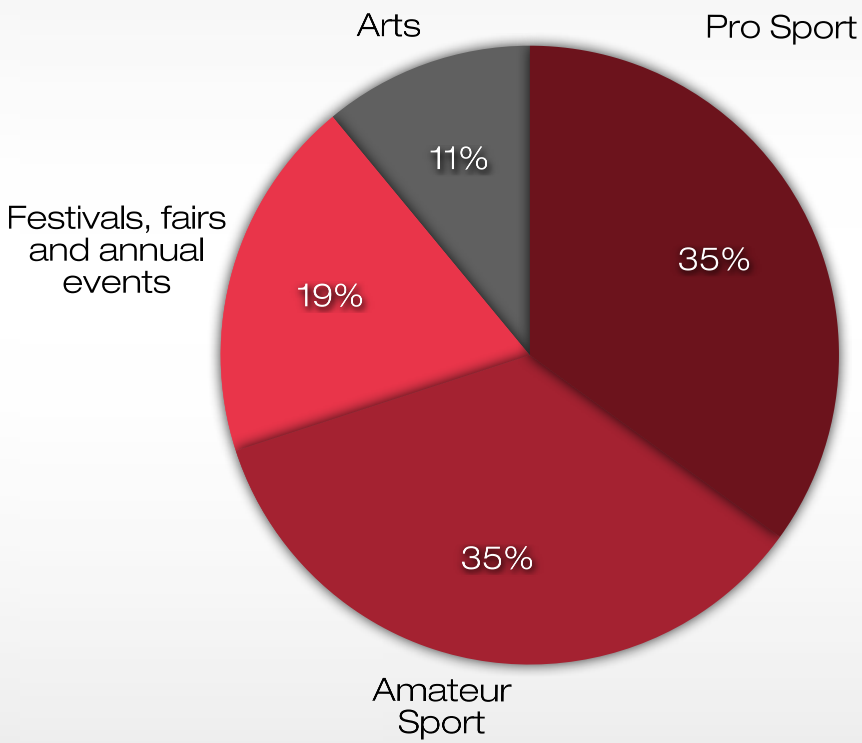
It is worth noting that while activation and sales continue to be a key area of work completed, evaluation and research saw considerable growth between 2011 and 2012.

ROI Results

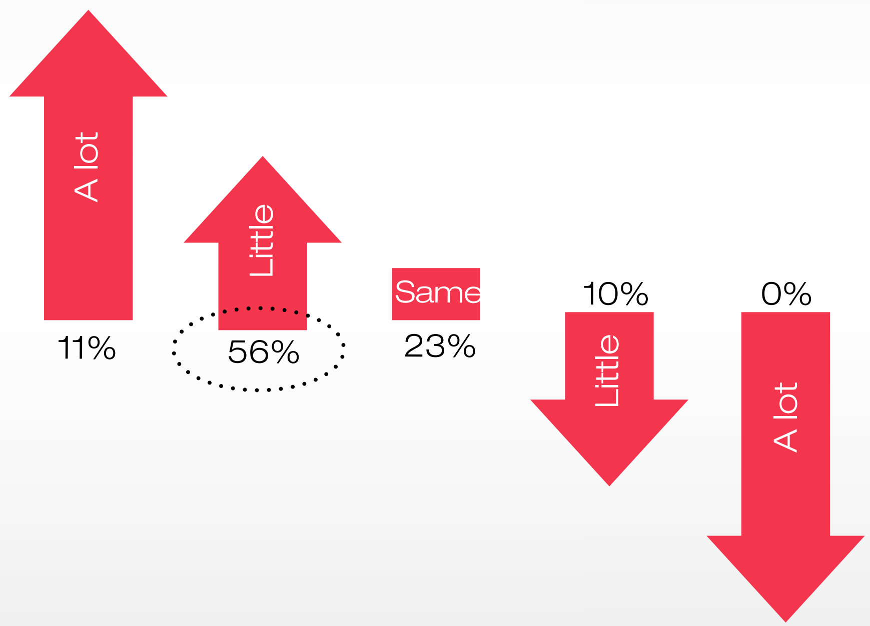
Canadian Sponsorship Landscape Study

SPONSOR ROI

Greatest ROI by Category



ROI From Sponsorship Change in Past 2 Years



Overall Satisfaction with ROI: 3.44

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Canadian Sponsorship Landscape Study

Generation

Sponsors were asked to indicate what the most successful category was for generating return on investment (ROI). Overall sport generated the most ROI. Outside of sport, festivals and arts, no other category provided this sample of sponsors with the greatest ROI within their portfolio.

Satisfaction

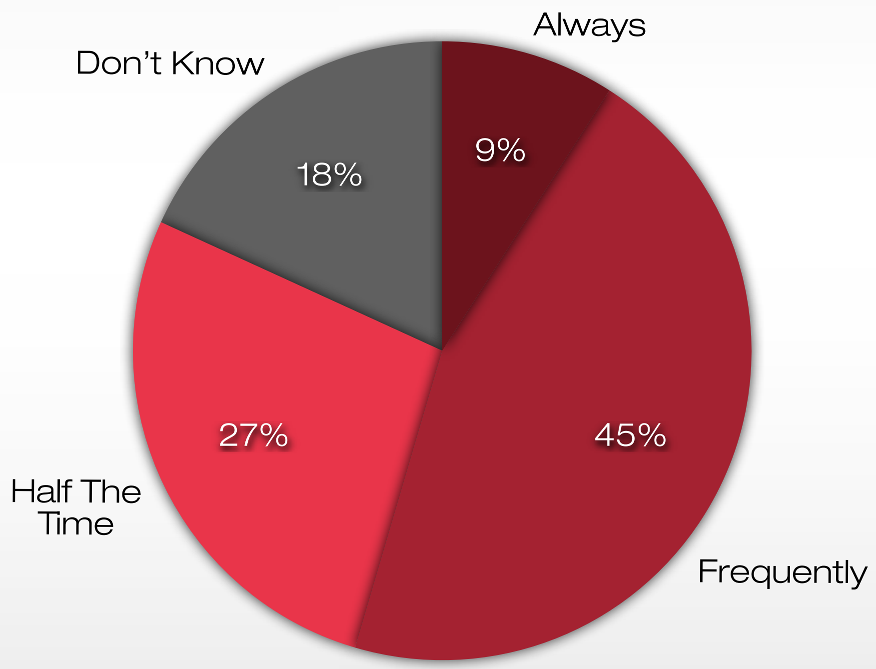
Sponsors report their satisfaction on a five-point Likert scale, where 1 is not at all satisfied and 5 is very satisfied. In 2012, satisfaction was 3.44, which is down from 3.84 in 2011.

Changes

Sponsors were asked to indicate how the ROI from their sponsorship marketing program changed over the previous two years. Most respondents (56%) indicated that there was a little increase. This was consistent with previous years where “increased a little” recorded percentages of 34.9% in 2010 and 46.0% in 2011.

RENEWAL

Frequency of Renewal



Factors Driving Renewal

Factors	Score
Exclusivity protection	4.67
Impact on sales	4.00
Extent of media coverage	3.90
Impact on brand/retail traffic	3.90
Internal team's opinion	3.89
Sponsor-sponsee relationship	3.89
Data collected online	3.80

Findings

Spponsors continue to regularly renew their sponsorship, with 81% renewing half the time or more and the remainder not sure either way. This distribution was similar to previous years, with 92% falling within these categories in 2011 and 79% in 2010.

There were several key factors that drove renewal. Most critical was the protection of exclusivity (4.67 in 2012 compared to 3.92 in 2011) and the impact on sales (4.00 in 2012 compared to 3.21 in 2011).

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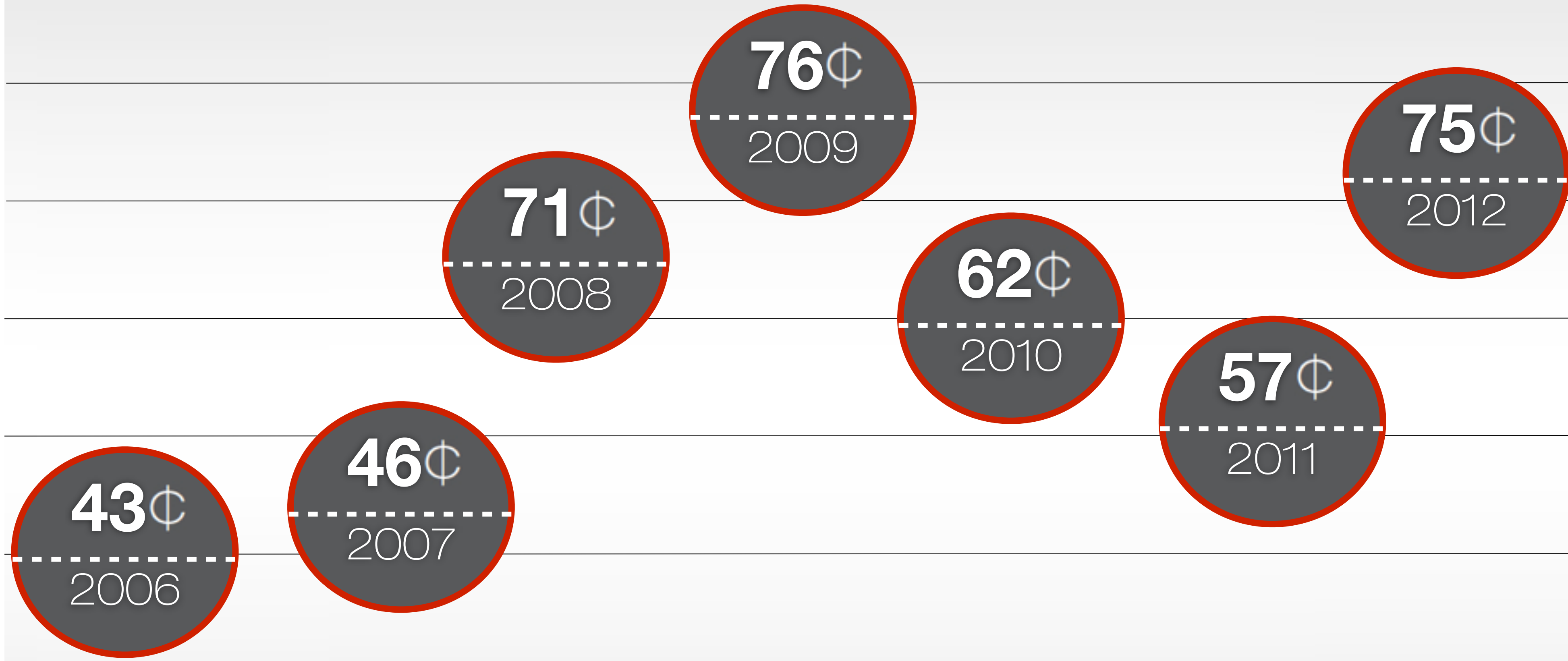
Activation Results

Canadian Sponsorship Landscape Study

ACTIVATION RATIO



	2008	2009	2010	2011	2012
United States (IEG):	$1.50	$1.40	$1.40	$1.60	$1.70

Findings

Sponsorship activation grew quite significantly since 2011 and was at the highest level in three years.

The activation ratio was determined by dividing the average amount spent on leveraging a sponsorship and comparing it o the average total rights fees paid per sponsorship.

In keeping with historical international trends, the activation ratio in Canada is considerably lower than in the US.

ACTIVATION BY SPONSOR

Where Are These Dollars Spent?

Tactic	2011	2012	Difference
Social media	10.1%	16.1%	6.0%
Hosting/hospitality	13.8%	14.6%	0.8%
Public relations	10.6%	14.5%	3.9%
Advertising	13.2%	11.5%	-1.7%
Creating branded content/events	11.6%	11.4%	-0.2%
Product sampling	4.2%	7.1%	2.9%
Internal Marketing	2.1%	6.3%	4.2%

Note: Social media has increased from 3.9% in 2009.

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Findings

Sponsors spent their activation dollars in a variety of ways.

2012 saw similar trends to 2011, where hosting/hospitality, public relations, advertising, and branded content/events remained key.

However, social media saw a significant growth in spend from 2011, continuing a trend from previous years - since 2009, sponsor activation spend in social media grew by over 300%.

ACTIVATION BY SPONSEE

Where Are These Dollars Spent?

Tactic	2011	2012	Difference
Hosting/Hospitality	20.8%	23.1%	2.3%
Advertising	26.1%	13.5%	-12.6%
Ancillary Events	2.3%	11.6%	9.3%
Publicity	19.0%	10.0%	-9.0%
Others	7.0%	9.1%	2.1%
Public Relations	9.6%	9.0%	-0.6%
Athlete	0.8%	7.1%	6.3%

Others: Speaking fees, signage, accommodations, agency fees, tickets, official product, servicing, staffing, travel, social media

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Findings

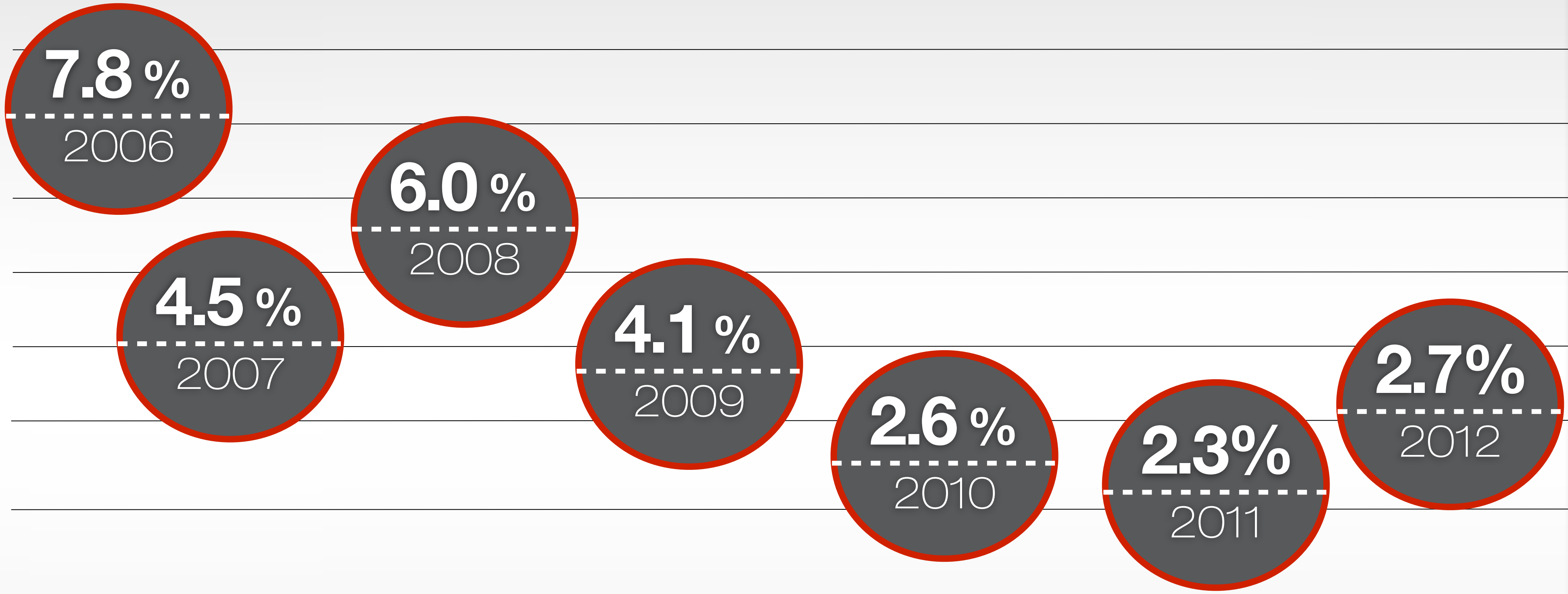
Sponsees spent their activation dollars in a variety of ways.

Hosting/hospitality and advertising remained a common tactic in 2012, however advertising declined dramatically and ancillary events grew.

Additionally, in 2012 'others' made up a very diverse selection of tactics.

Evaluation Results

EVALUATION



Pre-Sponsorship Evaluation: **14.90%** in 2012
0.56% in 2011

Agencies Involved: 50.1 % of sponsorships evaluated

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Findings

Sponsorship evaluation has declined since the study began in 2006. However, 2012 saw a slight increase in evaluation spend as a percentage of sponsorship marketing budget.

When an agency was involved, over half of the sponsorships worked on were evaluated, which is very similar to 2011 when 56.2% of sponsorships worked on by agencies were evaluated.

In contrast, pre-sponsorship evaluation as a percentage increased dramatically between 2011 and 2012, from 0.56% to 14.90%.

EVALUATION

Brand tracking studies

Media awareness

Employee engagement

"Attributable" sales

What is the most effective method?

Combination of media impressions and sales promotions

Mixed methods

ROO

Sales

Onsite surveys

Survey data

Written reports

Earned media

Findings

Respondents were asked an open-ended question about what they consider to be the most effective method of evaluation.

Several different types of evaluation were mentioned, including some in various combinations. Overall, this question and analysis provided an understanding that the most effective method of evaluation is diverse and often depends on additional circumstances - particularly the objective of the sponsorship.

Service Results

Canadian Sponsorship Landscape Study

VALUE OF SERVICES

Importance and Provision of Services to Sponsors

Variable	2012 Importance	2012 Provided	Difference
Resources for activation program	4.33	2.82	1.51
Sponsor recall stats	3.63	2.58	1.05
Concluding report/audit	3.61	2.98	0.63
Audience loyalty stats	3.59	2.74	0.85
Information on purchase behaviour of target group	3.48	2.26	1.22
Protection from ambush marketers	3.26	2.70	0.56
Protection of rights/exclusivity	3.24	3.91	-0.67
Partnering on activation with other sponsors	2.99	2.67	0.32
Partnering on activation with other sponsees	2.85	2.55	0.30

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Findings

Sponsors were asked to describe the value of services they received in a sponsorship on a five-point Likert scale, where 5 was very valuable and 1 was not at all valuable. They were also asked to indicate how often those same services were provided to them on a five-point Likert scale, where 5 was always provided and 1 was never provided. The difference was then calculated and provided insight into the disconnect that exists between the services that sponsors value and the services that sponsees and agencies provide to them.

For a historical overview of the value of services to sponsors, please refer to Appendix B.

BEST WORST SCALING

1st to 6th Annual CSLS
Identified Service Gaps

7th Annual
New Series of Questions

Best Worst Scaling
9 Categories, Combinations,
Performance vs. Importance

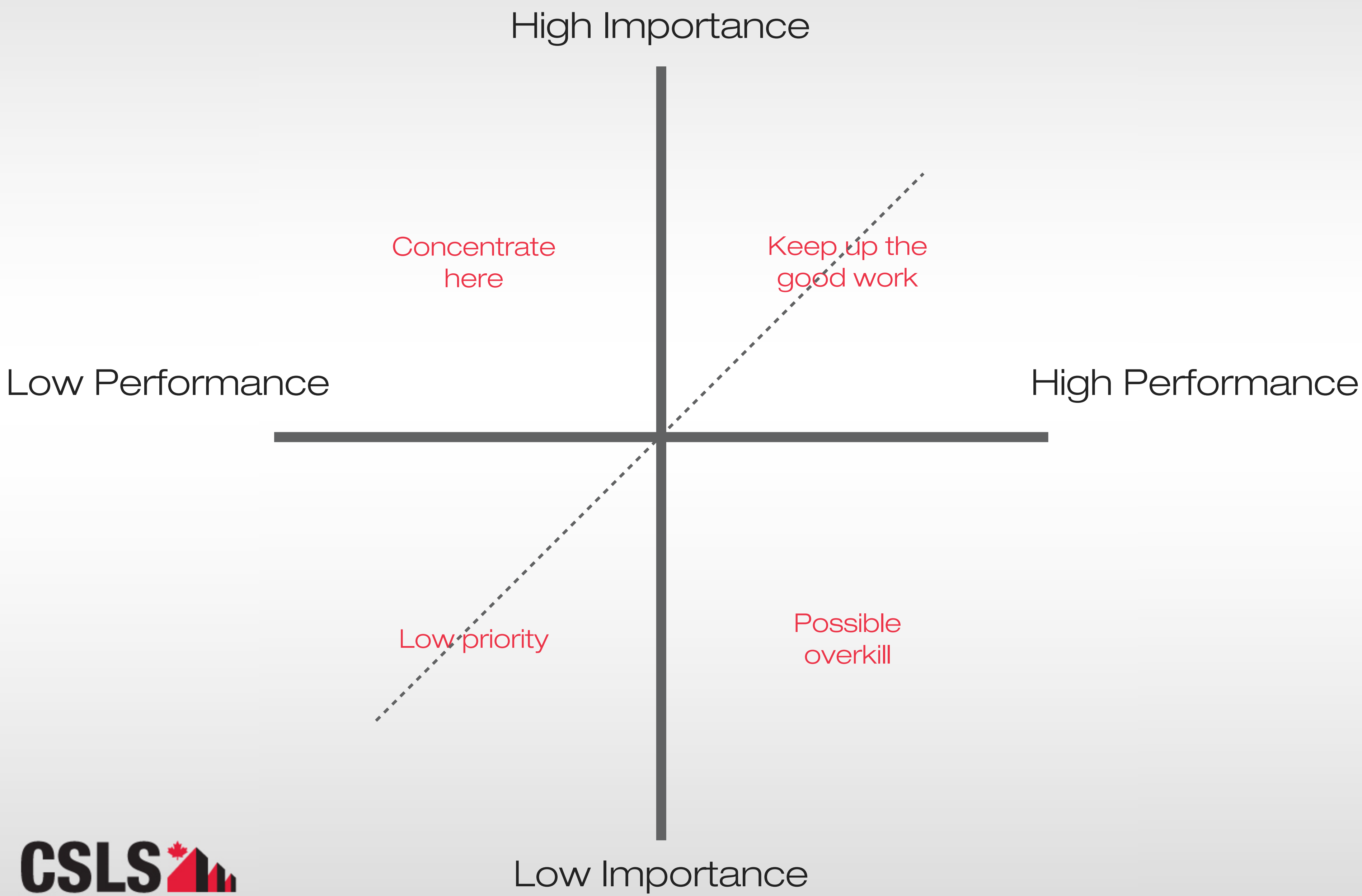
Guest Researcher: Dr. Twan Huybers
t.huybers@adfa.edu.au

Method

The first six years of the CSLS identified service gaps in sponsorship by sponsees. For the 7th annual CSLS, a new series of questions were added and expanded to include agencies.

Best Worst Scaling uses a series of combinations of the options (across nine categories) where respondents choose from the best and worst. Over the series of combinations and questions, an estimate of both “performance” and “importance” (which can be positive or negative) are made and plotted.

BEST WORST SCALING



Charts

The values were plotted on an axis for importance and performance. Both negative and positive values for each axis were possible.

Therefore, areas with high importance and high performance meant that they were seeing eye to eye and areas with high importance and low performance were areas to work on.

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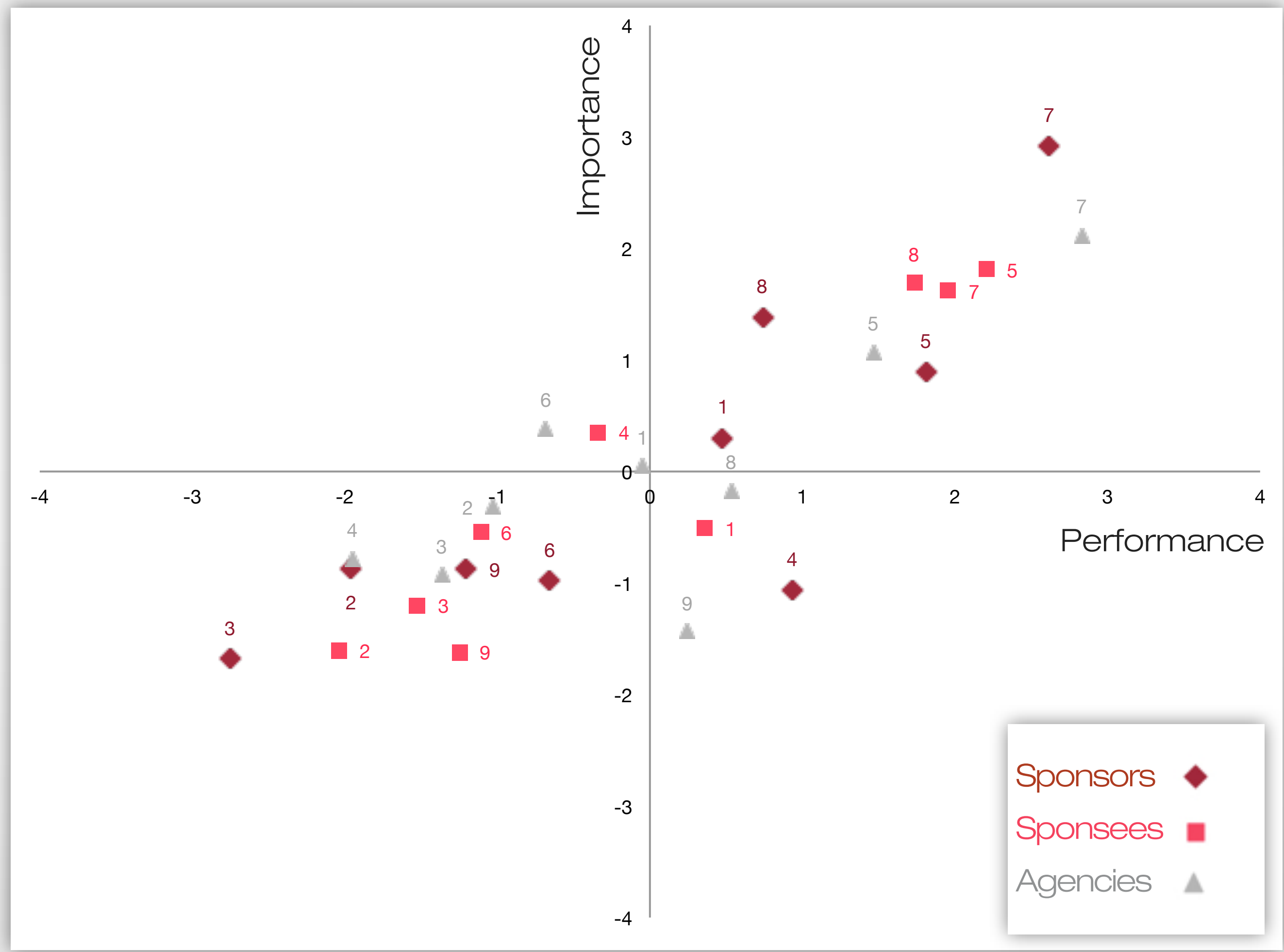
BEST WORST SCALING

Combined on Sponsee Services



Legend

1 Concluding report/audit

2 Sponsor recall statistics

3 Audience loyalty statistics

4 Partnering on sponsorship activation/activities with other sponsors

5 Partnering on sponsorship activation/activities with the property

6 Profile/information on purchase behaviour of sponsorship target group

7 Protection of sponsorship rights/exclusivity

8 Provide resources for sponsorship activation programs

9 Protection from ambush marketing

Findings

This chart outlines the importance and performance reported by sponsors, sponsees and agencies on sponsee services. The services are provided in the legend.

For example, sponsors, sposnees and agencies all consider it very important that sponsees provide protection of sponsorship rights and exclusivity (7) and sponsees follow through on delivering this.

In contrast, sponsors, sponsees and agencies considered it less important that sponsees provide audience loyalty statistics (3) and sponsees therefore tended to perform lower in this area.

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Qualitative Results

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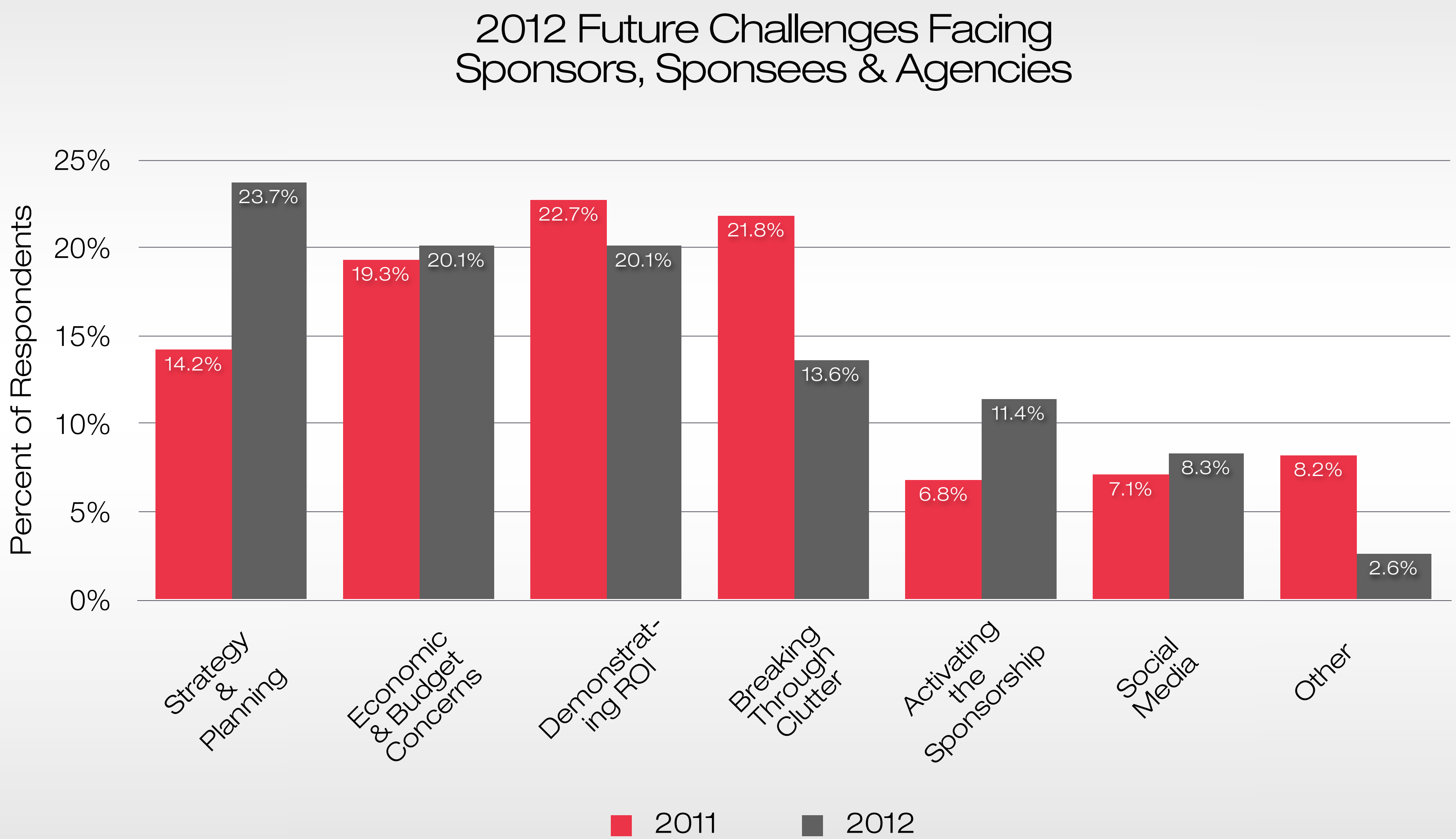
FUTURE CHALLENGES



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Findings

Respondents were asked what they considered to be the largest challenges facing sponsors, sponsees and agencies. These results were analyzed and grouped by theme and compared to the previous year.

Overall, respondents were much more concerned with strategy and planning in 2012 compared to 2011. Additionally, both economic and budget concerns as well as the ability to demonstrate ROI remained prevalent among challenges to be faced.

FUTURE CHALLENGES

"Striving towards meaningful partnerships that align with multiple business units on both the sponsor and sponsee side."

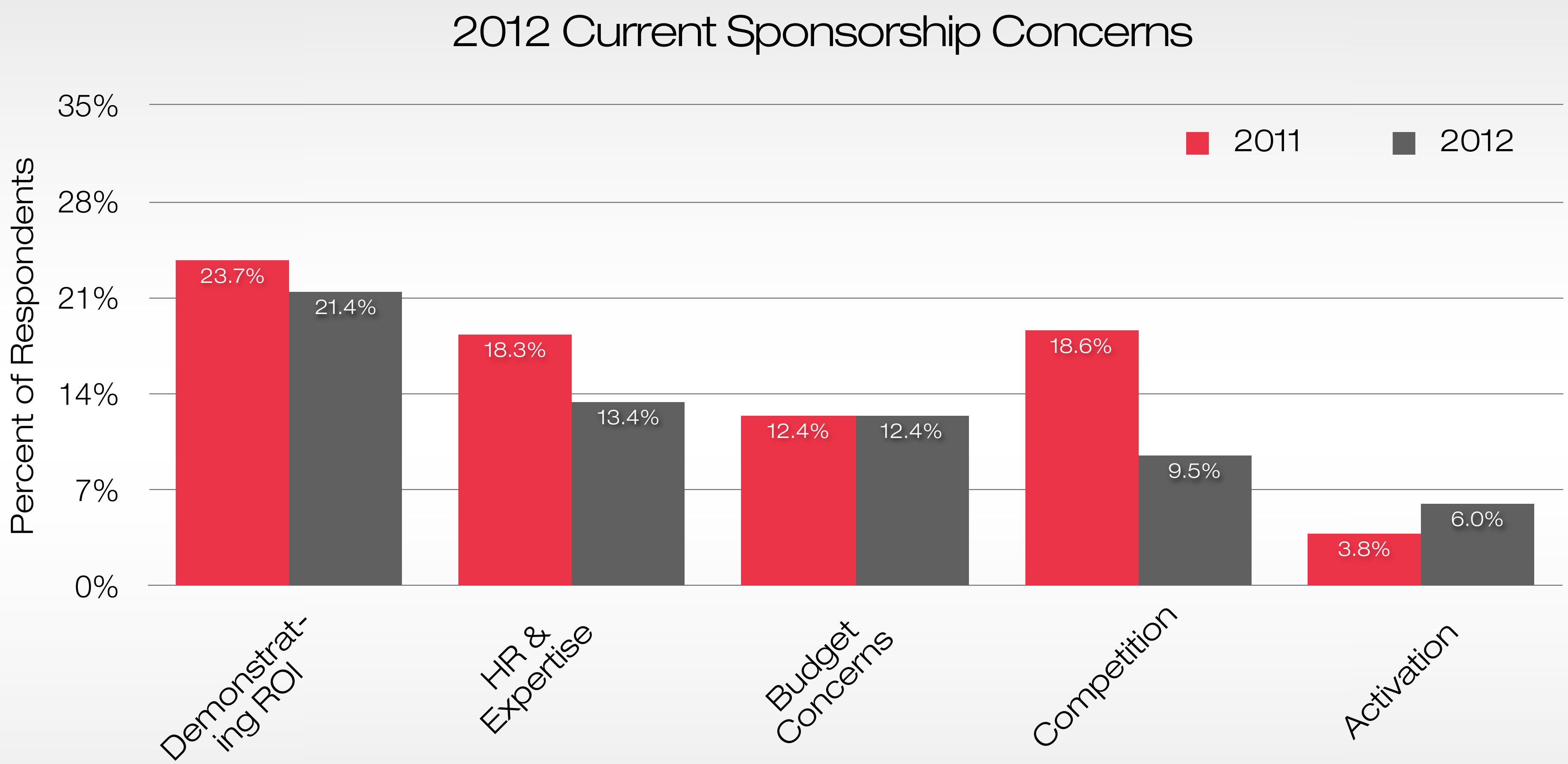
"Customer service (or a lack thereof) by sponsees and a historical view of 'What's in it for me?' not a servicing view of 'What can I do for them?'"

"Growing competition for sponsorship dollars as increase in sponsorship fluency permeates non-profit sector."

Quotes

A sample of respondent quotes that represent a few different themes from the previous analysis on future challenges.

SLEEPLESS NIGHTS



New for 2012: Securing Sponsorships 28.0%
Servicing Sponsorships 13.2%

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Findings

Respondents were asked what keeps them up at night about sponsorship which provided insight into what they considered to be the current concerns facing sponsorship.

Two new themes were derived from the analysis in 2012 - one related to getting sponsorship (e.g., sales) and one related to servicing these sponsorships.

The ability to demonstrate ROI and concerns about HR and expertise remained top of mind for many respondents.

SLEEPLESS NIGHTS

"Figuring out our value proposition and its worth to sponsors and which sponsors would value it the most highly."

"Lots of properties continue to not understand the importance of understanding the needs of brands/sponsors."

"Finding the right mix of properties and activation spend to maximize ROO [return on objective]."

"Finding long term sponsorships partners to help support the organization."

"Ensuring we have a big pipeline of prospects and no stone is left unturned."

Quotes

A sample of respondent quotes that represent a few different themes from the previous analysis on sponsor concerns and what keeps them up at night regarding sponsorship.

3 Sponsorship in 2013

Key Lessons from CSLS

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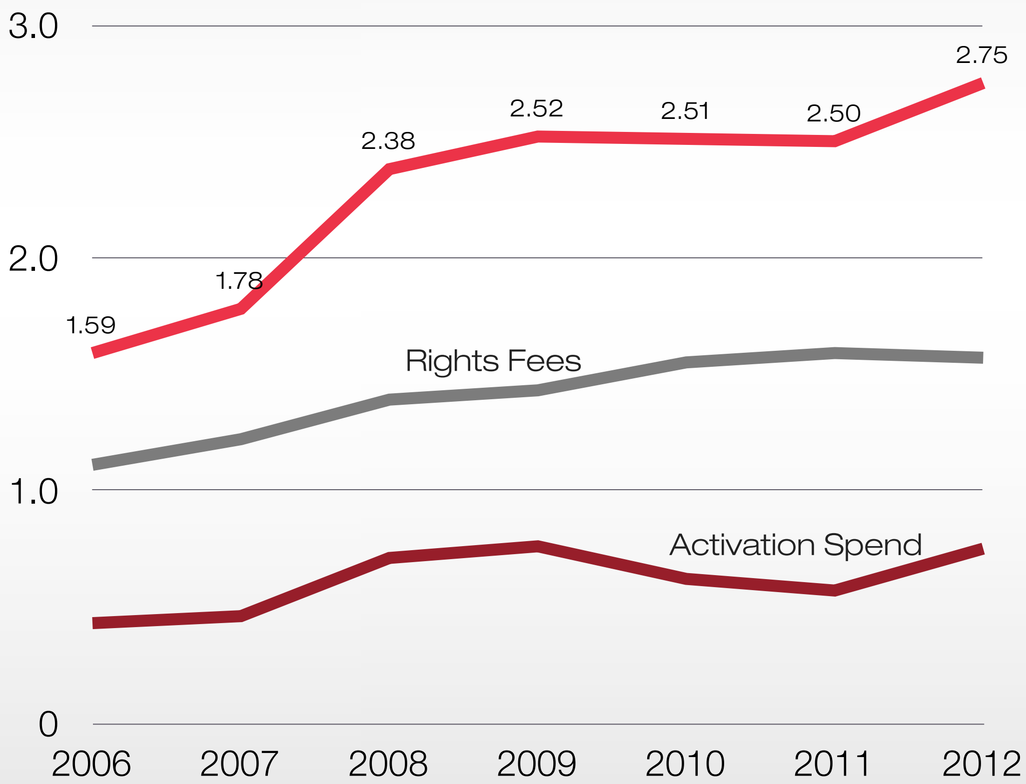
ACTIVATION REBOUND

KEY

Historical Total Spend Trends ($B)



Findings

↓ Rights Fees

↑ Activation Ratio

↑ Total Spend

2013 Activation

$1.57B Rights Fees

0.75 Activation Ratio

$2.75B Total

Agency by Client

$756,750 Activation Investment in 2012*

$608,334 Activation Investment in 2011*

*Excludes outliers >$20 M

Findings

Although sponsorship rights fees declined in 2012, the activation ratio grew and therefore the totals spend on sponsorship grew.

At $2.75 billion in total sponsorship spend, 2012 marked the highest year in the history of the study in regards to the total spend in the sponsorship industry.

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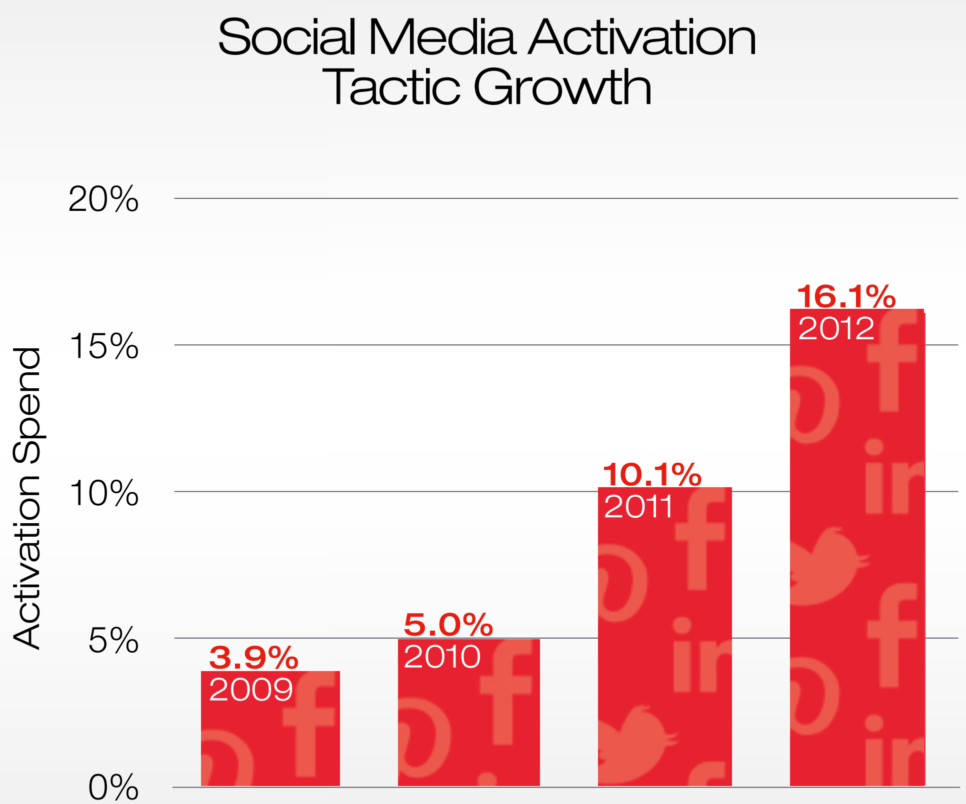
SOCIAL MEDIA FRENZY

KEY



Important Digital Activities

Blogging
Evaluation
Public Relations
Strategy
Email Updates
E-Newsletters
Website
Communications
Design
Research
Training

Findings

The growth of social media as an activation tactic has grown dramatically and steadily over the previous four years.

In 2012, social media accounted for the most percentage of activation spending by sponsors.

There are a number of digital activities that were considered important by responses.

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SOCIAL MEDIA AND...?

KEY

Theme 1: Integrating Traditional & Social Media

"In figuring out how to balance traditional and digital, it is very important to track what's trending and advise how to capitalize on opportunities."

Theme 2: Social Media Asset Value

"We need to learn the valuation of digital and social media assets."

Theme 3: Creativity in Digital Partnerships

"Le développement d'idéation sur mesure avec les partenaires numériques est clé."

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Findings

There are a few key considerations of how social media currently works with sponsorship and expectations for the future.

First of all, progress continues to be made on integrating new and social media with traditional media and understanding where and how each can be used maximally.

Second, sponsorship professionals continue to develop and work on ways to measure social media and translating that in to ROI and ROO.

Finally, creativity is a critical part of social media and partnerships and requires continual innovation.

Translation Note:

"Le développement d'idéation sur mesure avec les partenaires numériques est clé."

"The key is creating and developing customized ideas with digital partners."

WOMEN & SPONSORSHIP

KEY

Decision Maker Disconnect

Sponsors

4.8% Of Sponsorships Have Women As Primary Target Market
17.2% Of Sponsorship Investments Target Women
31.0% Expect Sponsorships Targeting Women to Increase

Sponsees

6.3% Of Sponsorships Have Women As Primary Target Market
66.3% Of Volunteers Are Women
4.7% Were Received from a Sponsor Whose Primary Target Market Was Female Consumers

Agencies

35.0% Of Sponsorships Have Women As Primary Target Market
13.1% Of Full Time Staff Are Women
46.0% Of Full Time Sponsorship Staff Are Women

Overall

29.8% Of Primary Sponsorship Decision Makers Are Women
37.7% Of Sponsorship Staff Are Women

Findings

The 7th annual CSLS took an in depth look at women in sponsorship.

Overall, very few sponsorships primarily target women, although when an agency is involved, this jumps quite dramatically to 35.0%.

Women tended to make up less than half of the sponsorship staff and over half of the sponsorship volunteers.

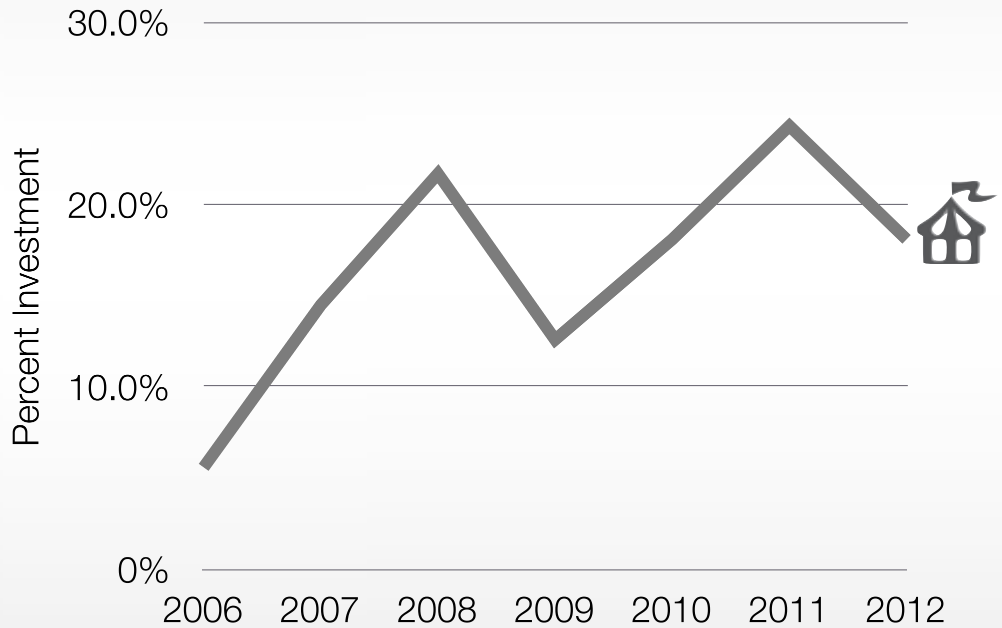
Additionally, nearly 30% of the primary sponsorship decision makers were women.

The forecast by respondents is positive as many expect that sponsorships targeting women to increase.

FESTIVALIZATION MATURES

KEY

Festival Sponsorship Investment

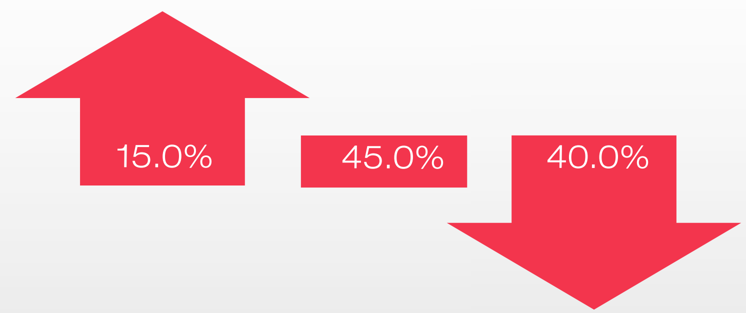


2012 Findings (Agencies)

30.8% Completed Work for a Festival Sponsor

46.2% Completed Work for a Festival Property

Expectations for Next Year



Findings

In 2010 and 2011 the CSLS identified that festivals, fairs and annual events were becoming more popular.

Although festivals, fairs and annual events continue to be a key sponsee type, the investment has appeared to have plateaued.

Additionally, merely 15% of respondents expect that investment in festivals will increase next year and 85% expect it will remain the same or decline.

Overall, festivalization appears to have reached its maturity.

FESTIVALIZATION SECRETS

KEY

Sponsors Invest in Festivals for a Variety of Reasons

"Présence régionale."

"Captive audience."

"100% traditional tie to sports and direct relationship with our brand."

"Allows us to diversify our sponsorship portfolio and connect with customers who are not sports fans."

"Fit our focus areas of youth and health."

"Support of local grassroots cultural events and to build goodwill with local communities."

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Quotes

Sponsors were asked why they invest in festivals, fairs and annual events. A variety of reasons were given. Often, festivals provide a captive audience, allow brands to target non-sport consumers and allows for a local or grassroots community focus.

Translation Note:

"Présence régionale."

"Regional presence."

FESTIVALIZATION VIEWS

KEY

Agencies: Why Are Sponsors Interested in Festivals?

"Engagement." | "Ability to leverage the event marketplace in Quebec and Toronto." | "Ability to activate to reach specific target markets easily."

Agencies: How Are Festivals Able to Attract Sponsors?

Niche | "A festival catering to people of all ages and interests would be far less valuable than a festival catering to 18-30 year old electronic music fans."

History Matters | "Established festivals with a strong following are better in attracting."

Agencies: Why Are Clients Not Interested in Festivals?

"Lack of awareness of festivals." | "Poor fit with target market(s)." | "Not part of a broader strategic marketing plan." | "Short-term nature of activations." | "Prefer exclusive experiences for consumer."

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Themes

A few key themes allow for more in-depth insight into festival sponsorships. These were based on specific questions to agencies.

Overall, sponsors looked to festivals as a key investment because they allowed for engagement of particular target markets.

Festivals as properties attracted sponsors because of their ability to focus their target markets.

Finally, for clients of agencies that were not interest in sponsorship, there were a multitude of reasons provided that covered many different factors.

COMMUNITY MATTERS

KEY

Link Activation to Community Benefits and Needs

"Améliorer qualité de vie des gens dans la communauté par des programmes reliés aux commandites."

Provide Value to Participants

"By providing incentives that encourage participation, and adding PR value through sponsee's social media, PSAs, or by brining high profile personalities to events."

Maximize Experiential Opportunities

" Focus on donations, in kind sponsorship, education and health programs, employee engagements events, youth wellness, and festivals to engage at the grassroots levels."

"Sponsorship allows the private sector to become players in and stakeholders in the shared vision, volunteerism, and collaborative programs of a community."

Themes

Community is a key component of sponsorship in Canada. It allows sponsors to connect to communities, increases the experience of participants and festival consumers and provides a great opportunity for creative experiential activation.

Translation Note:

"Améliorer qualité de vie des gens dans la communauté par des programmes reliés aux commandites."

"Improving the quality of life within the communities through sponsorship programs."

SUMMARY

2013
Tells a Good Story!

Smarter
Spending ↓, Activation ↑, Total Spending ↑

Progress
Evaluation, Social Media, Activation, Servicing

Festivalization
Here to Stay

Women
Representation & Targets

Summary

2013 tells a good story for sponsorship professionals in Canada.

Spending is smarter, and although spending on sponsorship rights fees declined, activation increased and total spending on sponsorship (rights fee plus activation) is at its highest level ever.

Significant progress has been made in several key areas. In evaluation, the percentage of rights fees spent on evaluation increased from 2.3% to 2.7%. The activation ratio grew from 57 ¢ to 75 ¢. The spend on social media as an activation tactic grew from 10.1% to 16.1%.

Festivalization of sponsorship has meant that there was an in crease in sponsorship spending on festivals, fairs and annual events. The growth has appeared to plateau after several years of growth. Festivals are now a critical component of the sponsorship mix in Canada.

Finally, women are underrepresented as sponsorship target markets and present a key area of growth over the next few years.

Thank you!

If you have any questions or concerns about the study or would like more information, please feel free to contact either of the following individuals:

- Dr. Norm O'Reilly at norman.oreilly@ottawau.ca
- Elisa Beselt at elisa.beselt@trojanone.com

APPENDIX A

Historical Sponsorship Investment Areas (%)

	2006	2007	2008	2009	2010	2011	2012
Professional sport	27.0%	26.1%	24.3%	28.3%	21.9%	19.3%	27.2%
Amateur/Olympic sport	27.0%	26.1%	24.3%	22.5%	14.9%	18.7%	22.2%
Cause marketing	16.9%	8.3%	12.5%	14.7%	12.1%	5.1%	9.9%
Festivals, fairs, annual events	5.6%	14.5%	21.7%	12.6%	18.1%	24.3%	18.1%
Arts	10.9%	8.3%	10.7%	4.9%	9.2%	12.0%	10.5%
Entertainment, tours, attractions	12.6%	6.0%	6.5%	1.9%	6.9%	7.9%	1.0%
Media	-	-	-	4.2%	5.3%	0.1%	5.9%

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Sponsor Spend by Type (%)

This table outlines the percentage of sponsorship investment by area by year.

APPENDIX A

Sponsor Spend by Type ($ Millions)

This table outlines the amount of sponsorship investment by area by year.

Historical Sponsorship Investment Areas ($ Millions)

	2006	2007	2008	2009	2010	2011	2012
Professional sport	$300	$318	$338	$405	$339	$307	$427
Amateur/Olympic sport	$300	$318	$338	$322	$231	$297	$349
Cause marketing	$188	$101	$174	$210	$188	$82	$155
Festivals, fairs, annual events	$62	$177	$302	$180	$280	$387	$284
Arts	$121	$101	$149	$70	$143	$190	$167
Entertainment, tours, attractions	$140	$73	$90	$27	$107	$126	$16
Media	-	-	-	$60	$82	$2	$93

APPENDIX B

Importance and Provision of Services to Sponsors

Variable	Importance 2012	Importance 2011	Importance 2010	Importance 2009	Provided 2012	Provided 2011	Provided 2010	Provided 2009
Resources for activation program	4.33	4.09	3.90	4.03	2.82	2.59	2.84	3.03
Sponsor recall stats	3.63	3.88	4.20	4.24	2.58	2.52	2.49	3.23
Concluding report/audit	3.61	3.94	4.22		2.98	3.03	3.02	3.34
Audience loyalty stats	3.59	3.55	4.00	4.09	2.74	2.74	2.52	3.09
Information on purchase behaviour of target group	3.48	3.50	3.51	3.91	2.26	2.27	2.64	3.11
Protection from ambush marketers	3.26	3.48	3.76	-	2.70	2.76	2.86	-
Protection of rights/ exclusivity	3.24	3.24	4.02	4.33	3.91	3.70	3.21	3.69
Partnering on activation with other sponsors	2.99	3.06	4.32*	4.03*	2.67	2.62	3.09*	3.09*
Partnering on activation with other sponsees	2.85	3.06			2.55	2.56		

***Note:** In 2009 and 2010, the type of partnership (e.g., with sponsors or sponsees) was not specified.

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Historical Value of Services to Sponsors

This table outlines the importance and provision of services provided to sponsors since 2009 based on a five-point Likert scale.