

WHITE PAPER

Presented by
Partnership Group – Sponsorship Specialists™

**Consumer Sponsorship Rankings 2011
Highlights Presentation**
By Brent Barootes
January 26, 2012

CONSUMER SPONSORSHIP RANKINGS (CSR) 2011 HIGHLIGHTS PRESENTATION

**SPONSORSHIP MARKETING
COUNCIL OF CANADA**

January 26, 2012



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THE EVER CHANGING WORLD OF SPONSORSHIP

- ✓ Thanks for having me here again
- ✓ Last year did a presentation on municipalities and sponsorship
- ✓ Proud to present the CSR 2011 results
- ✓ Research provided by Enigma Research based here in Toronto

Canadian Sponsorship Landscape Study 2011

Thanks to:

- ✓ Norm O'Reilly and Benoit Seguin
- ✓ University of Ottawa
- ✓ Sponsorship Marketing Council of Canada
- ✓ TrojanOne
- ✓ Canadian Sponsorship Forum
- ✓ IMI International



- ✓ 407 responses for the 2011 CSLS with about 54% from selling properties and the balance from sponsors and agencies
- ✓ Ongoing since 2006 and clearly shows a 40% growth in our industry over that term



Canadian Sponsorship Rankings (CSR) 2011



Consumer Sponsorship Rankings (CSR) 2011

- ✓ Canada's first Consumer Sponsorship Ranking revealed amazing results
- ✓ Why we undertook this study
- ✓ 1st year of the rankings, year two and forward will show real trending
- ✓ This study is available for subscription purchase
- ✓ There will be a 2012 survey and now working with partners on it

Consumer Sponsorship Rankings (CSR) 2011

✓ **Feedback from purchasers to date:**

- *Eye opening on real consumer feedback versus exit surveys and brand studies*
- *Excellent independent study finally*
- *Questioning of the sample size and validity of the study*
- *Weighting of regions*
- *Why many properties and sponsors who “we” feel should have ranked did not*

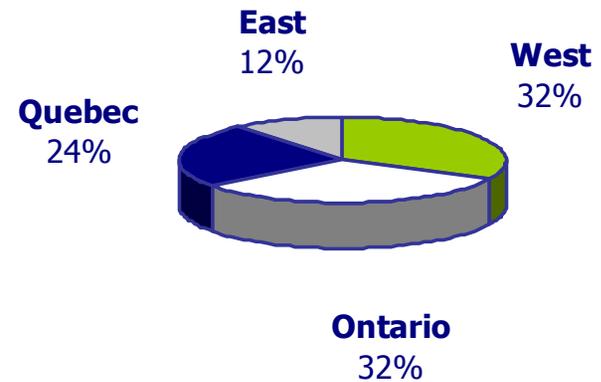
2011 CSR Methodology

STUDY BACKGROUND	
Owner	The Partnership Group – Sponsorship Specialists
Research supplier	Enigma Research Corporation®
Type of study	Syndicated

METHODOLOGY SUMMARY	
Survey methodology	CATI personal telephone interviews
Sample size	500 completed interviews
Sampling plan	Matched pop. by age and region
Sampling technique	Random sampling
Languages offered	English and French
Interview length	8 to 10 minutes

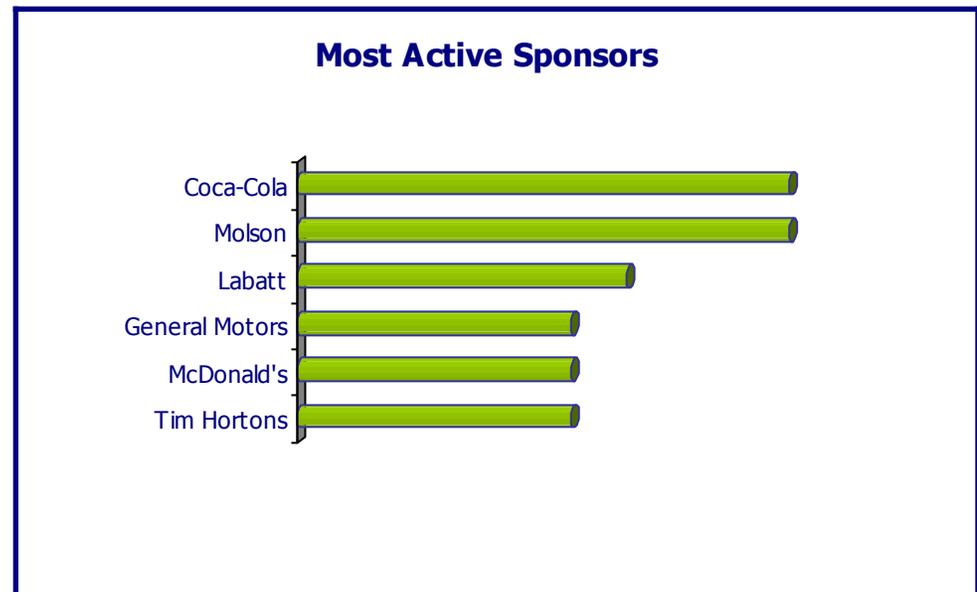
ABOUT ENIGMA RESEARCH CORPORATION®	
Established	1993
Locations	Toronto and Orlando
Specialty	Event and sponsorship research
Experience	500+ sponsorship-related studies
Clientele	Events, sponsors, governments
Project leader	Michael Harker, Senior Partner

Interviews by Region



1. Coca-Cola and Molson viewed as most active sponsors in Canada

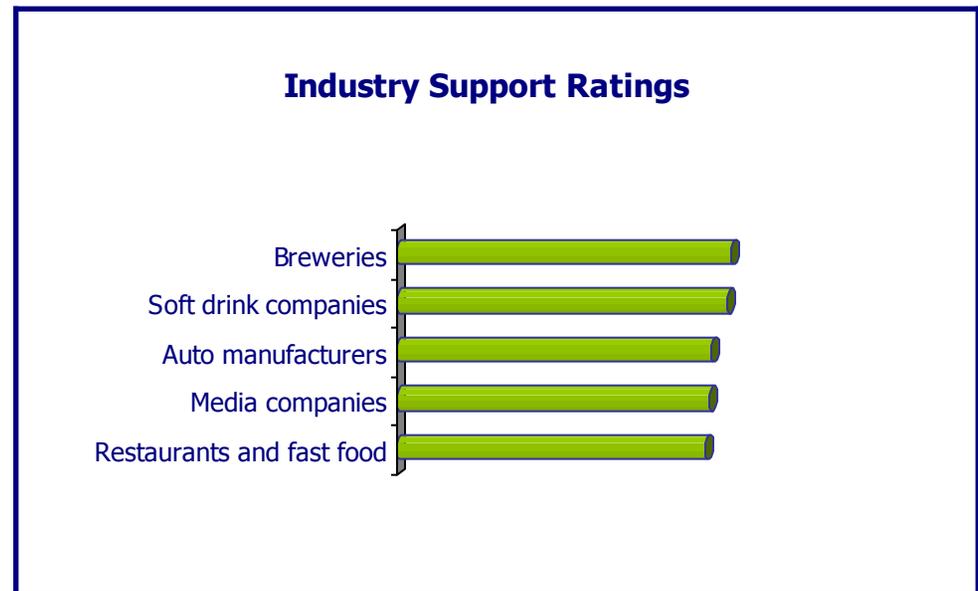
- Unaided question asked Canadians to name most active sponsors of Canadian sports, cultural events, and causes
- Coca-Cola and Molson tied for most recalled overall, followed by Labatt, GM, McDonald's and Tim Hortons



CSR Insight: McDonald's ranked #1 among Canadians under age 30

2. Breweries and soft drink manufacturers rated as most supportive industries

- Canadians were asked to rate a list of 14 industries in terms of their support for sports, culture, and causes
- Breweries ranked first, followed closely by soft drink companies; insurance industry rated lowest



CSR Insight: All 14 industries scored lower in Western Canada than in other regions

3. Study identified most supportive sponsors within largest industries

- 46% believe Air Canada is the most supportive travel company in Canada; highest score among all industries
- Coca-Cola and McDonald's also scored very high within their industries



CSR Insight: One-quarter of high-income Canadians believed RBC was most supportive financial institution

4. Most important properties identified by Canadians

- Canadians identified the Stanley Cup Playoffs as the most important annual sports event in the nation
- Canadian Cancer Society seen as most important cause; Montreal Canadiens most prestigious sports team



Canadian Cancer Society
Société canadienne du cancer

CSR Insight: Canada Cup curling championship ranked higher than Stanley Cup playoffs in both Ontario and Quebec

5. Visibility and branding seen as top reasons why companies sponsor

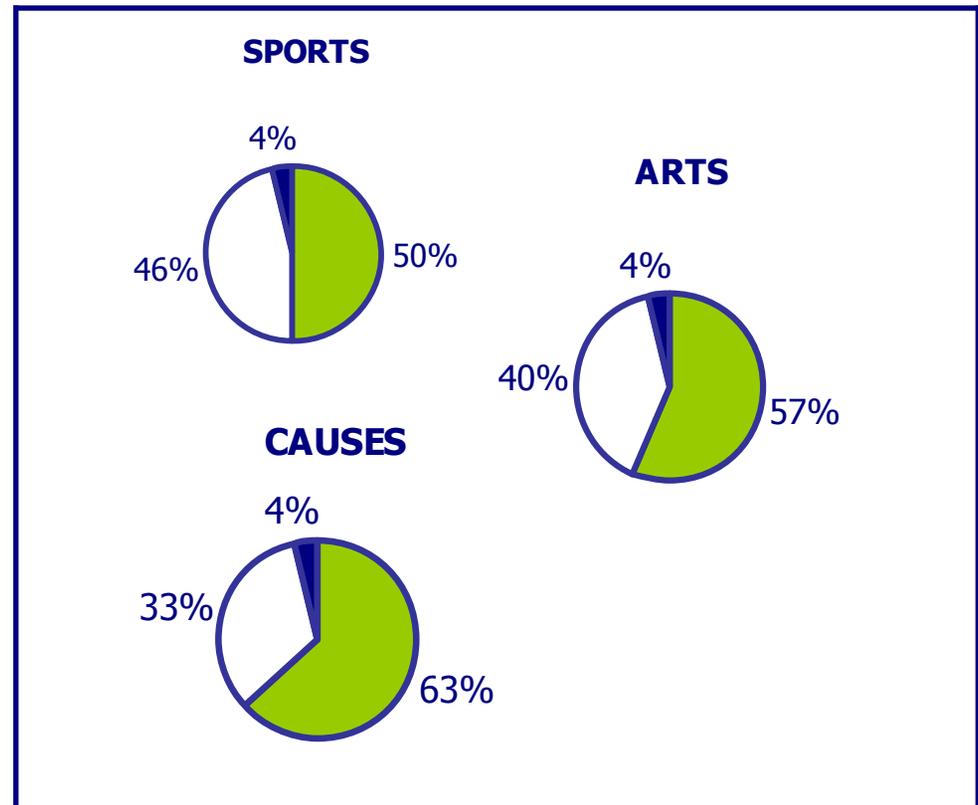
- Three in five Canadians believe corporations sponsor “so people will see their name”
- Nearly half said sponsors want to create brand loyalty



CSR Insight: Western Canadians twice as likely as Quebec respondents to believe sponsors want to “put profits back into community”

6. Majority prefer to conduct business with sponsors of favourite events and causes

- 63% agreed that all other things being equal, they would prefer to do business with sponsors of favourite causes
- By comparison, 57% agreed to same statement regarding arts/cultural events and 50% regarding sports

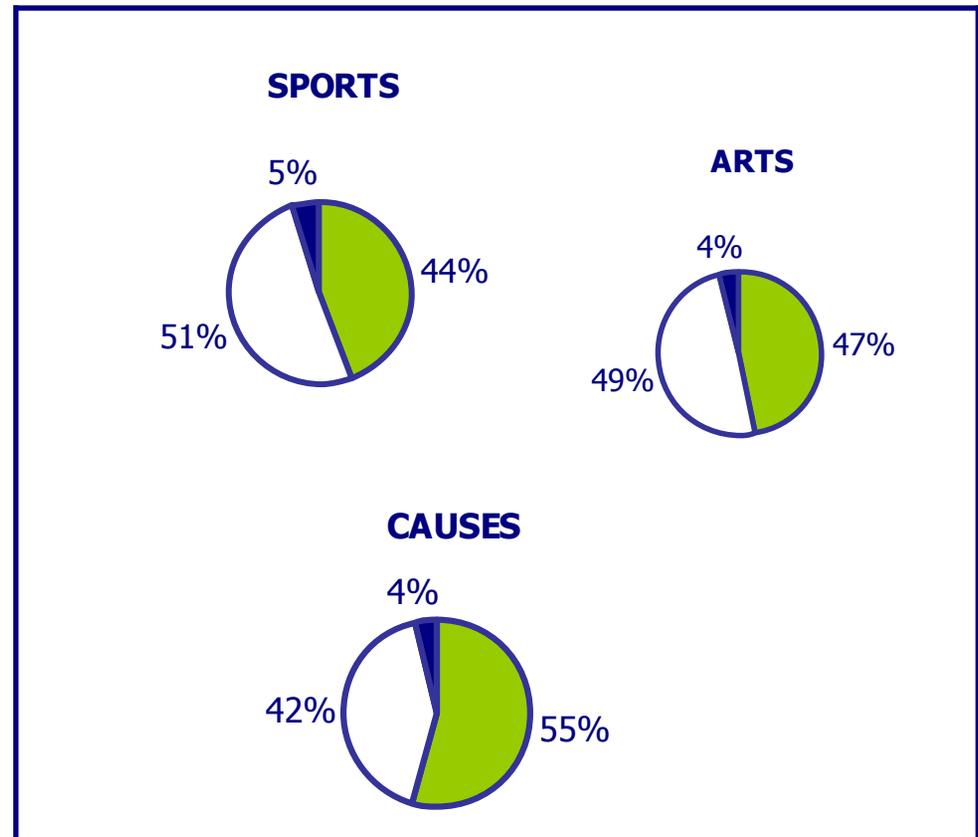


CSR Insight: 70% of couples with no children prefer to conduct business with companies that support their favourite causes

7. Approximately half would switch brands if sponsor made meaningful contribution

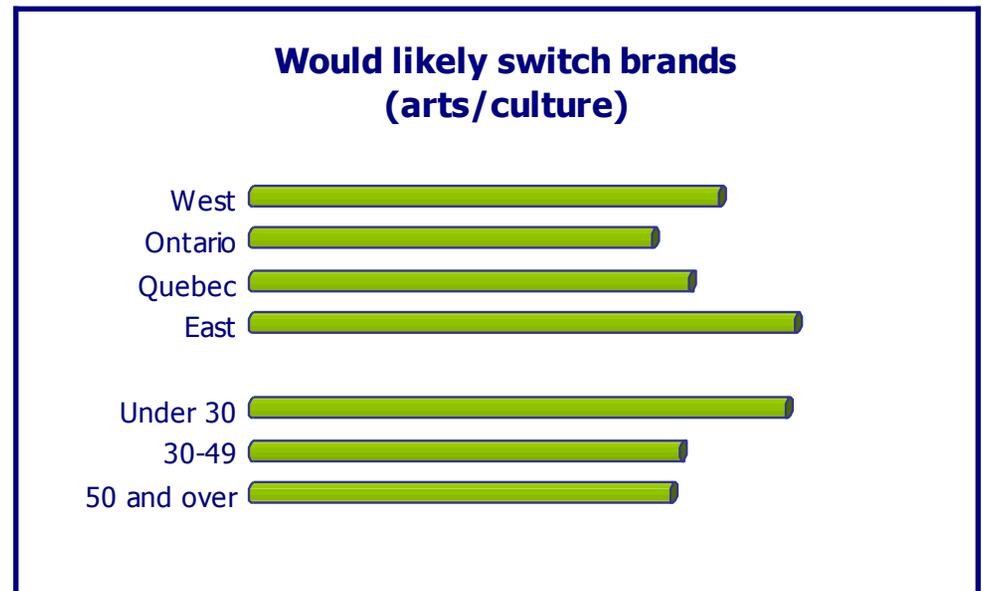
- Overall, 55% would likely switch brands if sponsor made meaningful contribution to favourite charity or cause
- 47% agreed to similar statement regarding arts/culture and 44% for sports

CSR Insight: 64% in Western Canada would likely switch brands if company made meaningful contribution to favourite cause



8. Support for sponsors varies considerably by demographic and region

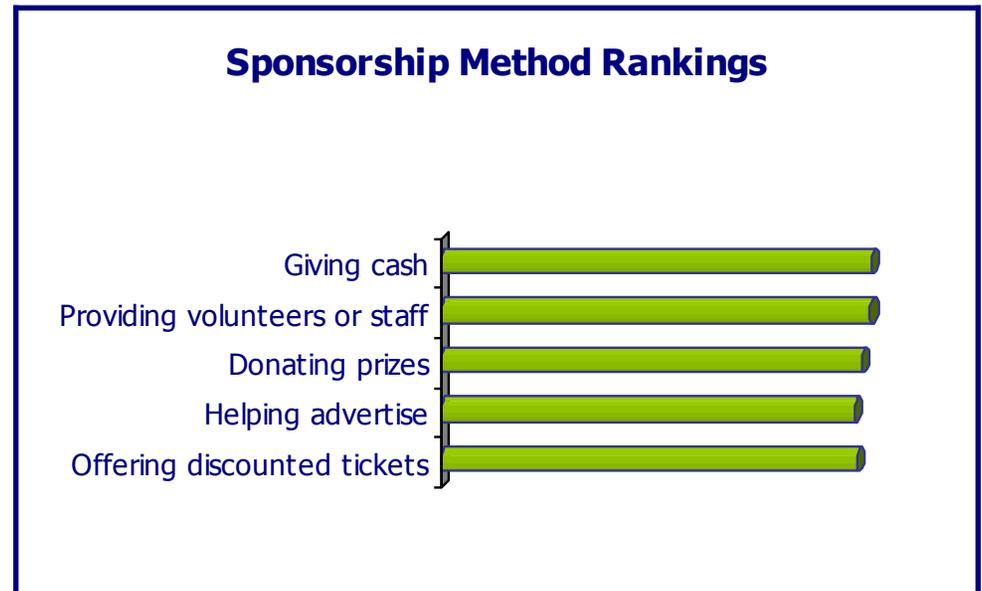
- Canadians under age 30 more likely than older consumers to conduct business with sponsors or switch brands
- Western Canadians more likely to switch brands for causes; East coasters more likely for arts; Quebec for sports



CSR Insight: Higher income Canadians least likely to be brand loyal, especially in sports

9. Giving cash, providing volunteers or staff most appealing sponsorship methods

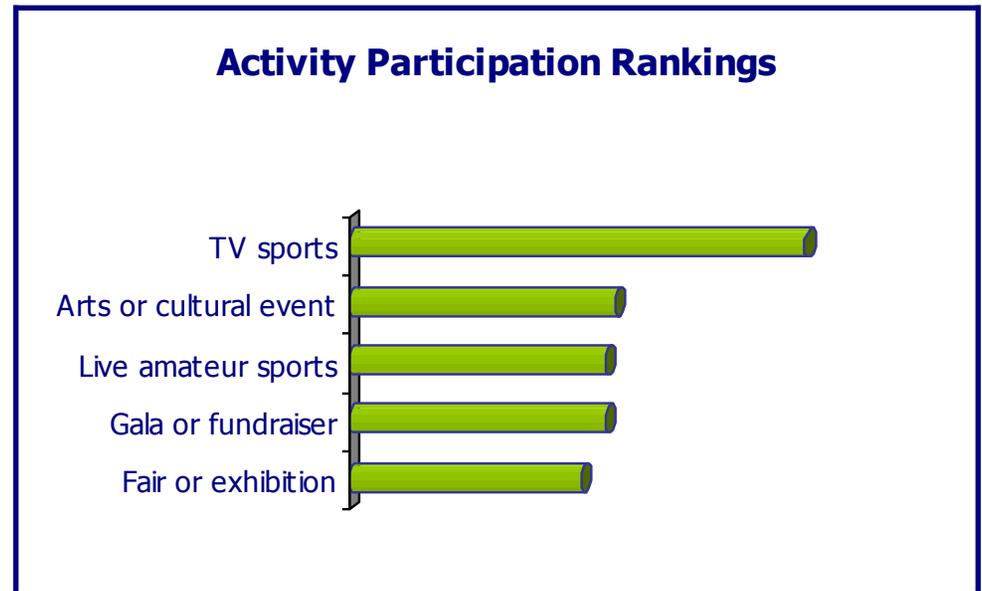
- Canadians were asked to rate the appeal of 10 common sponsorship methods
- Giving cash, providing volunteers/staff ranked highest overall; providing guest speakers and executives rated lowest



CSR Insight: In general, all types of sponsorship methods appeal more to Canadians under age 30 vs. older respondents

10. Millions of Canadians participate in types of activities sponsored by corporations

- Overall, 55% indicated that they had watched sports on television within the previous 12 months
- 32% attended an arts festival or cultural event; 31% attended amateur sport; 31% attended a gala or fundraiser



CSR Insight: 37% of higher-income Canadians attended a live professional sporting event within 12 months

Consumer Sponsorship Rankings 2011

Insights and Take Aways

- ✓ Interesting that no FI ranked in top 6 of Canadians minds though they are the #1 most active category in Canada
- ✓ Bell Canada lead the way in telecommunications and technology industries
- ✓ Wal-Mart was recognized as the leading sponsor in large retail outlets followed by HBC, Home Depot, Sears, Canadian Tire and Home Hardware (no RONA in top 6!)

Consumer Sponsorship Rankings 2011

Insights and Take Aways

- ✓ In regards to the top ranked fairs and exhibitions, the Calgary Stampede and Canadian National Exhibition (CNE) tied for #1 spot



Consumer Sponsorship Rankings 2011

Insights and Take Aways

- ✓ The #1 ranked arts and cultural event in Canada according to Canadians was a tie between the **Canadian Tulip Festival** and **Festival du Voyageur** (followed by Carnaval de Quebec, ScotiaBank Caribana, Edmonton Fringe Festival and again the Stampede)

Consumer Sponsorship Rankings 2011

Insights and Take Aways

- ✓ Some surprising results such as TIFF and Montreal Jazz Festival just barely made the top 10 festivals or cultural events in Canada
- ✓ Canada Cup Curling Ranked #2 annual sporting event and Tim Horton Brier barely made the top 10



Consumer Sponsorship Rankings 2011

Insights and Take Aways

- ✓ Looking at annual sporting events, Grey Cup ranked third while the Edmonton Indy ranked and the Toronto Indy did not, but three auto racing events ranked in the top 10



Consumer Sponsorship Rankings 2011

Wrap Up

1. There is a need to listen to Canadian consumers
2. This study becomes an important parallel to the CSLS
3. Great information and insights for both brands and properties

Consumer Sponsorship Rankings 2011

QUESTIONS?

Thank You

Please visit
[our website](#) for more
information

