

SMCC *Webinar* Series

*10 Positive Things in Canadian
Sponsorship in 2020: Takeaways from
the 14th Annual Canadian Sponsorship
Landscape Study & Expert Input*



Using Zoom Webinars

- Difficulty hearing? Go to 'Audio Settings' and check your speaker settings
- Any other Zoom issues? Please post a question in the Q&A and our tech support will try to help

The session will be recorded and available for registrants to view



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Thank you to Our Foundational Partners!



WASSERMAN



Introducing... The new SMCC website!

Login to your new membership profile by
clicking 'Forgot Password'



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SPONSORSHIP
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Call for SMCC Diversity, Equity & Inclusion Committee Volunteers

Apply by Wednesday, February 3, 2021



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Last *December's* Forum



The image shows a YouTube player interface. At the top left is the YouTube logo with 'CA' next to it. To the right is a search bar with the word 'Search' inside. The main video area displays a webinar slide with the following text: 'SMCC Webinar Series', 'Changing Media Landscape', and 'Will Digital Replace Traditional Broadcast?'. Below the text are social media icons for Facebook, Instagram, Twitter, and LinkedIn, with the handle '@SMCC_CCC' underneath. At the bottom of the slide is the logo for 'SPONSORSHIP MARKETING COUNCIL CANADA'. A small video inset in the top right corner of the player shows a woman speaking. The video progress bar at the bottom indicates a duration of 0:15 / 58:34.



Save *the* Date

Connected Wellness as the New Normal is Here to Stay - How Brands Can Get Moving on the Growth of This Reality

Date: February 24, 2021

Time: 12:00 - 1:00 PM ET

Location: Virtual

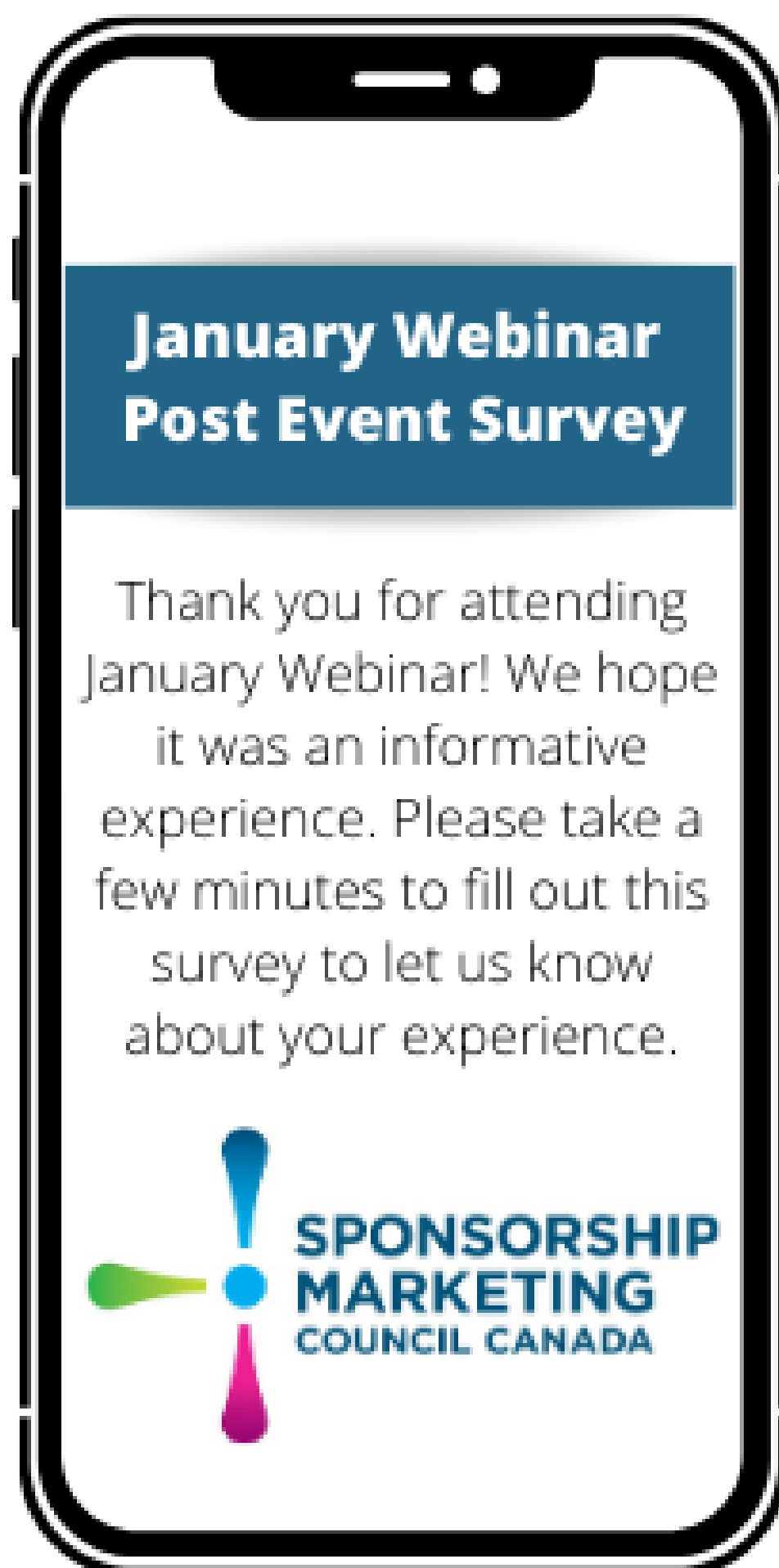


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Tell Us What You Think!



SMCC_CCC



Bell Let's Talk

Now more than ever,
every action counts.

Join the conversation on January 28 and Bell will donate 5¢ towards Canadian mental health initiatives for every:

- Text message*
- Local or long distance call†
- #BellLetsTalk use on Twitter and TikTok
- Use of the Bell Let's Talk Facebook frame
- Use of the Bell Let's Talk Snapchat filter
- Official Bell Let's Talk Day video view on social media



bell.ca/letstalk

*From Bell Let's Talk or Bell Let's Talk mobile or home phone numbers. Regular service charges apply.



Maintenant plus que jamais,
chaque geste compte.

Rejoignez-vous à la conversation le 28 janvier et Bell versera 5¢ à des initiatives canadiennes en santé mentale pour chaque :

- Message texte*
- Appel local et interurbain†
- Utilisation du mot-clic #BellCause sur Twitter et TikTok
- Utilisation du cadre Bell Cause pour la cause sur Facebook
- Utilisation du filtre Bell Cause pour la cause sur Snapchat
- Visionnement de la vidéo officielle de la Journée Bell Cause pour la cause sur les médias sociaux:



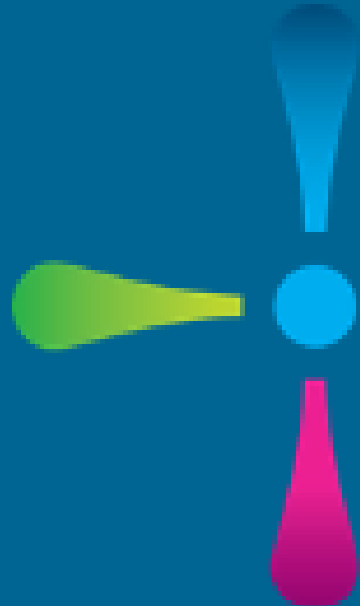
bell.ca/cause

*Sur un plan de Bell Let's Talk ou Bell Let's Talk mobile ou de téléphone résidentiel. Des frais de service peuvent s'appliquer.



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**SPONSORSHIP
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Moderator

Norm O'Reilly

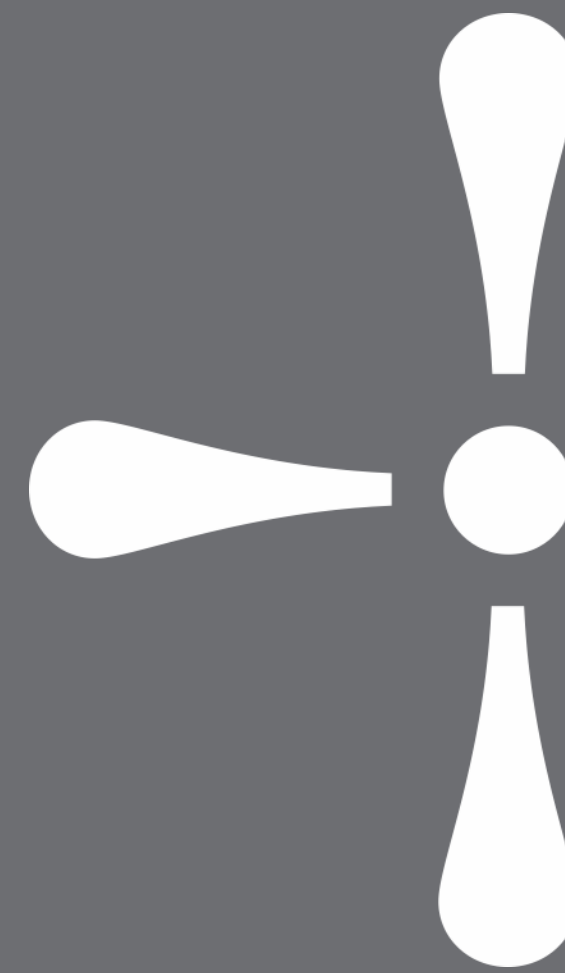
Director and Professor, International
Institute for Sport Business & Leadership,
University of Guelph

Partner Consultant, The T1 Agency



10 POSITIVE THINGS IN CANADIAN SPONSORSHIP IN 2020

SMCC Webinar



**SPONSORSHIP
MARKETING
COUNCIL CANADA**

CSLS 
CANADIAN SPONSORSHIP LANDSCAPE STUDY

The Story of 2019:

**A Year to Remember in
Canadian Sponsorship**

14th ANNUAL

CSLS



CANADIAN SPONSORSHIP LANDSCAPE STUDY



IMI

www.sponsorshiplandscape.com

Lead Author: DR. NORM O'REILLY



History

14th Annual

CSLS Landmarks & Breakthroughs

2007

Activation Ratio: 0.43

First ever validation that activation in Canadian sponsorship was significantly behind other major countries of the world.

2008-2010

Recession Proof

As the 'Great Recession' hit many countries, including Canada, CSLS results showed sponsorship kept growing.

2013

Festivalization

CSLS authors coined the term "festivalization" as the festival category took similar proportion of sponsorship investment in Canada from 2011 to 2013.

2014 & 2018

Pro Sport Renaissances

The proportion of sponsorship spend dedicated to pro sport spikes in 2014 and again in 2018.

2018

\$3 Billion

Total sponsor spend (rights fees plus activation) exceeds \$3 billion for the first time. More than double the first year of CSLS.





Method

14th Annual

THE STUDY: CSLS 101



Origin

Need
Share
Bilingual
Canadian



Perspective

Spend
Revenue
Billing



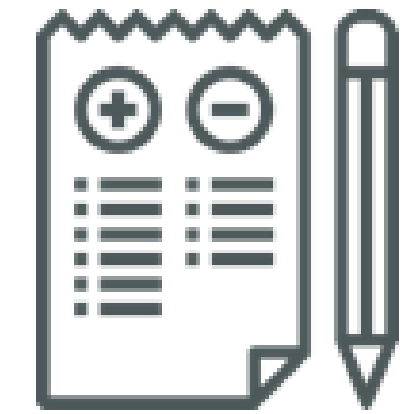
Process

Phone
Online
Attribution



Analysis

Themes
Comparative
Modelling



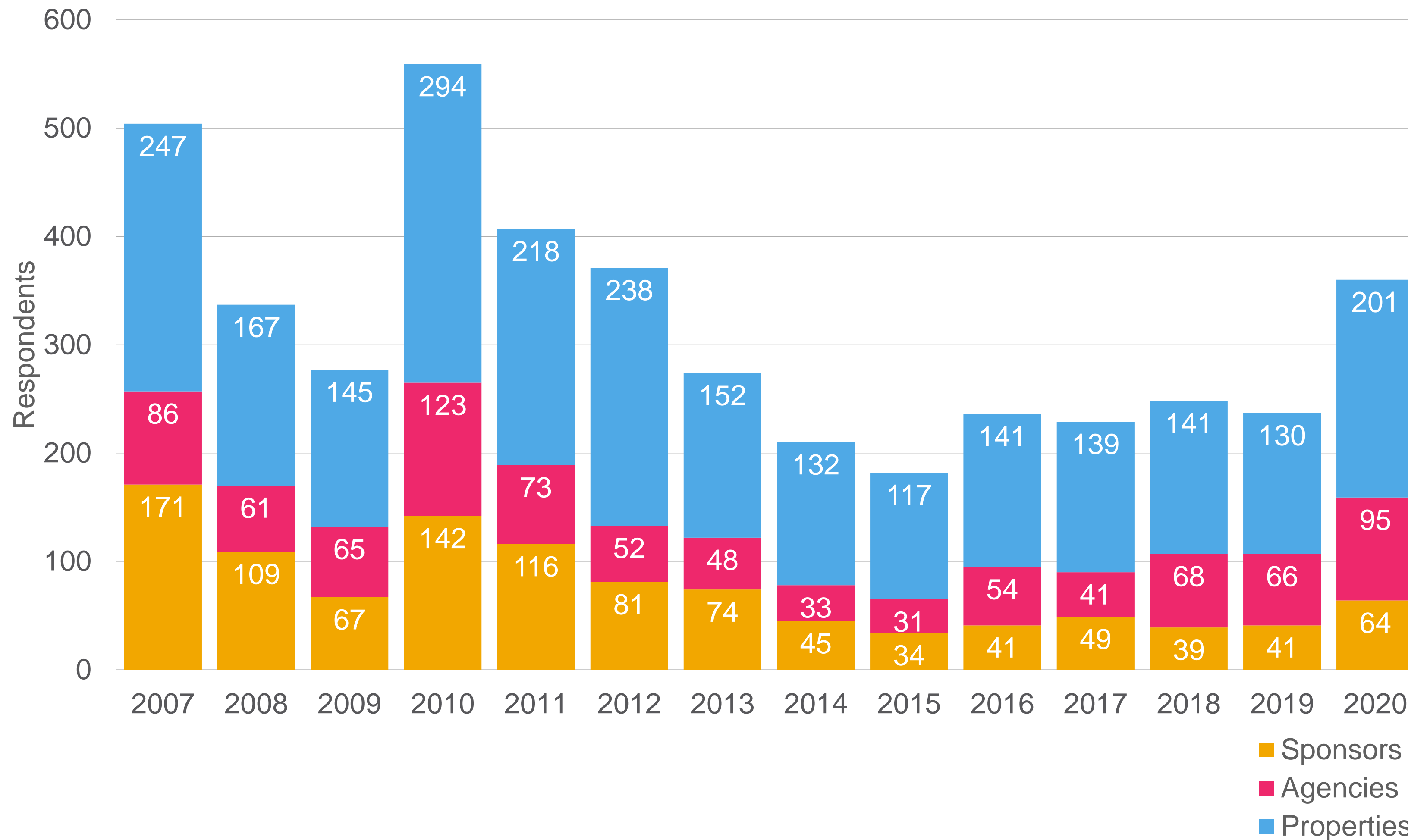
Design

Longitudinal
Triangulation
Deep Dives
Trends

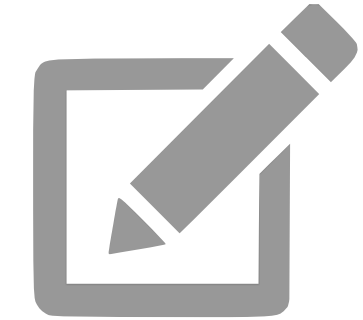


RESPONDENTS

Historical CSLS Respondents by Type



DATA



4,435

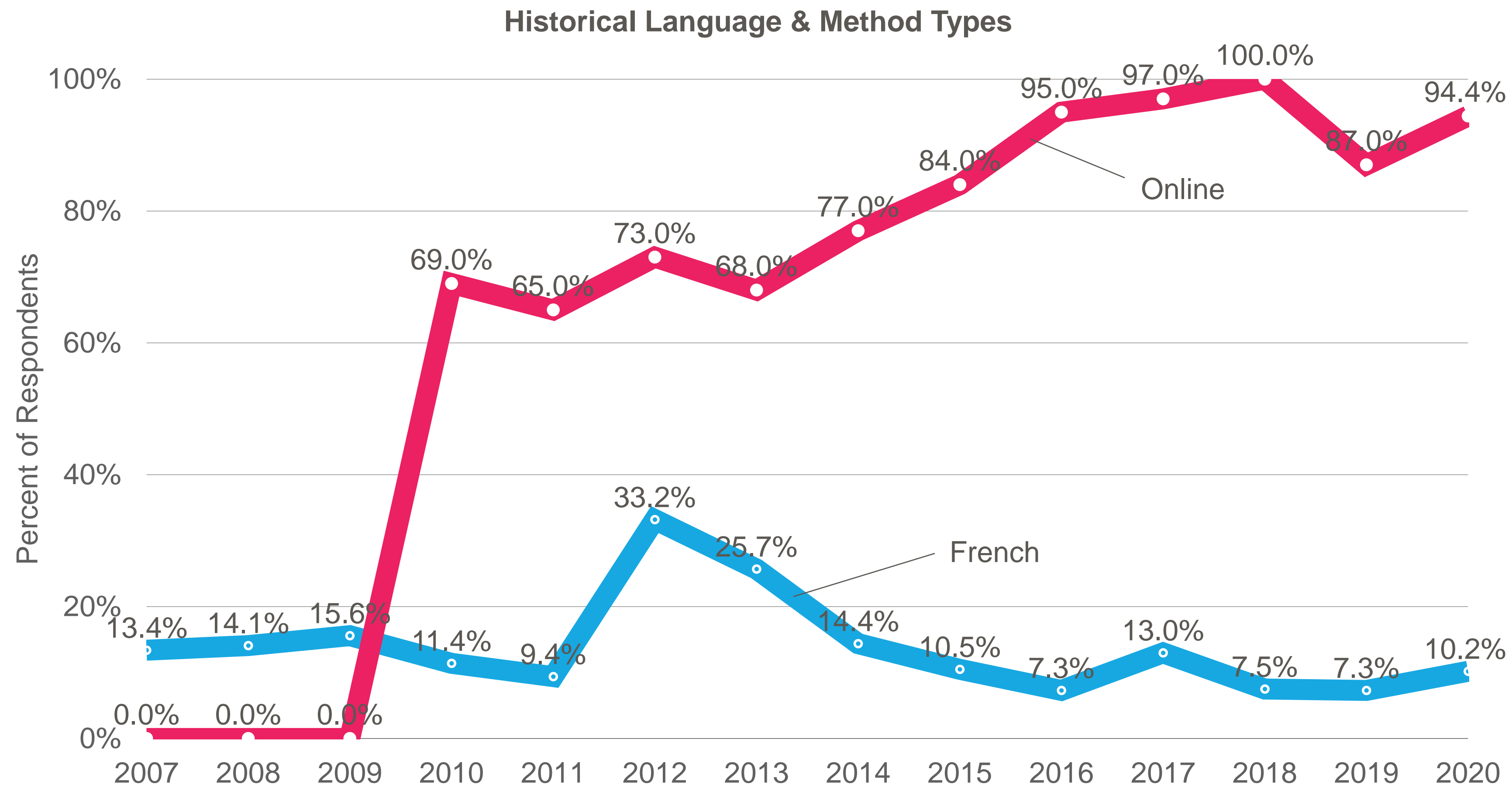
Total Respondents

NOTE

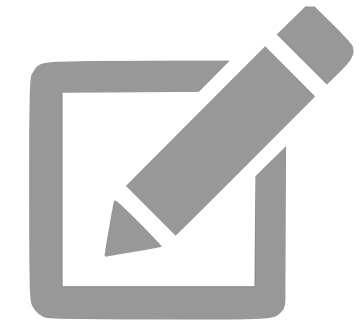
After going online in 2010, the number of respondents continually declined until a survey redesign in 2016. 2020 best response in 8 years.



SURVEY PARTICULARS



DATA



14 Years

Language & Method of Response

NOTE

French rates rose around conference in Montreal; lower since.

Online at 100% for first time in 2018, but some offline in 2019 & 2020.





10+1! Select Results

And positive ones...

Speakers

Tania Crecco - Head of Corporate Partnership, Dairy Farmers of Canada

Sahr Saffa - Founder of C-Tribe Festival; Marketing Director, AutonomIQ

Jacqueline Ryan - Chief Brand and Commercial Officer, Canadian Olympic Committee

Troy McCann - Sr. Director, Marketing, Wasserman Sports & Entertainment

Daniel Asfaha, Co-Founder, Keevo

John Griffin - Director, Corporate Partnerships, Toronto Blue Jays Baseball Club

Andrea J. Shaw - Founder & Managing Partner, TTG Canada (comprised of TTG Partnerships & TORQUE Strategies)

Yoeri Geerits - Partner and Consultant, Charlton Insights

Zaileen Janmohamed - Head of Partnership Development & Innovation, U.S. Olympic and Paralympic Properties

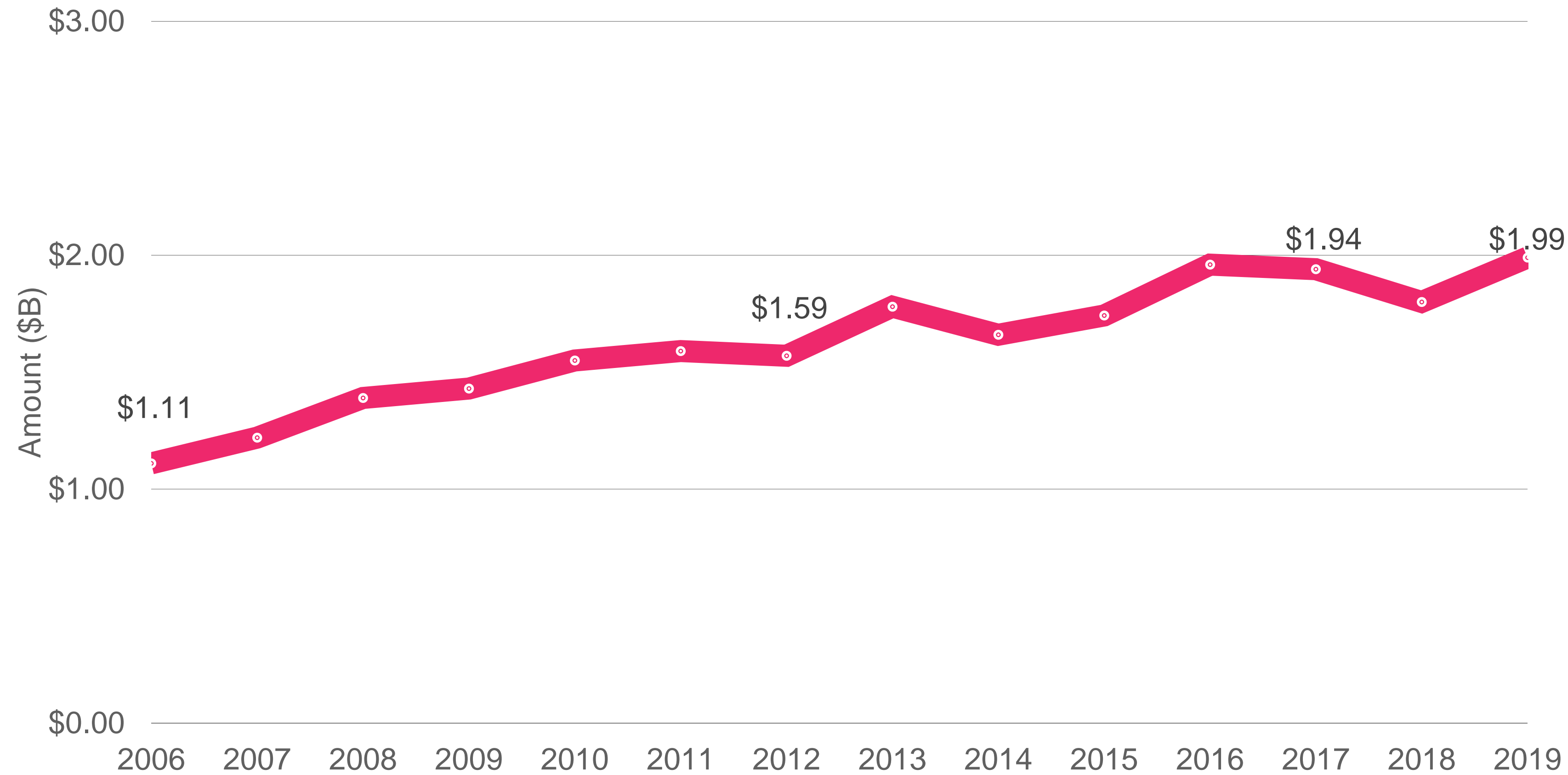
Karim Fathi - VP Digital (Americas), SPORTFIVE

Adam Holt - SVP Sales, FanAI Inc



CANADIAN INDUSTRY SIZE

Historical Canadian Sponsorship Industry Size: Rights Fees



DATA



\$1.99B

2019 Rights Fee Spend

NOTES

Past 5 years: Consistent

Historical: CAGR of 4.59%



1.

1. Consumer Passions

Tania Crecco

3. Importance of Exclusivity

Jacque Ryan

5. & 6. Pro Sport: Renaissance

Daniel Asfaha & John Griffin

8. Evaluation Conundrum

Yoeri Geerits

10. International Reach

Karim Fathi

2. Digital Activations

Sahr Saffa

4. Activation Growth

Troy McCann

7. Service Deficiency

Andrea Shaw

9. Activation Gap

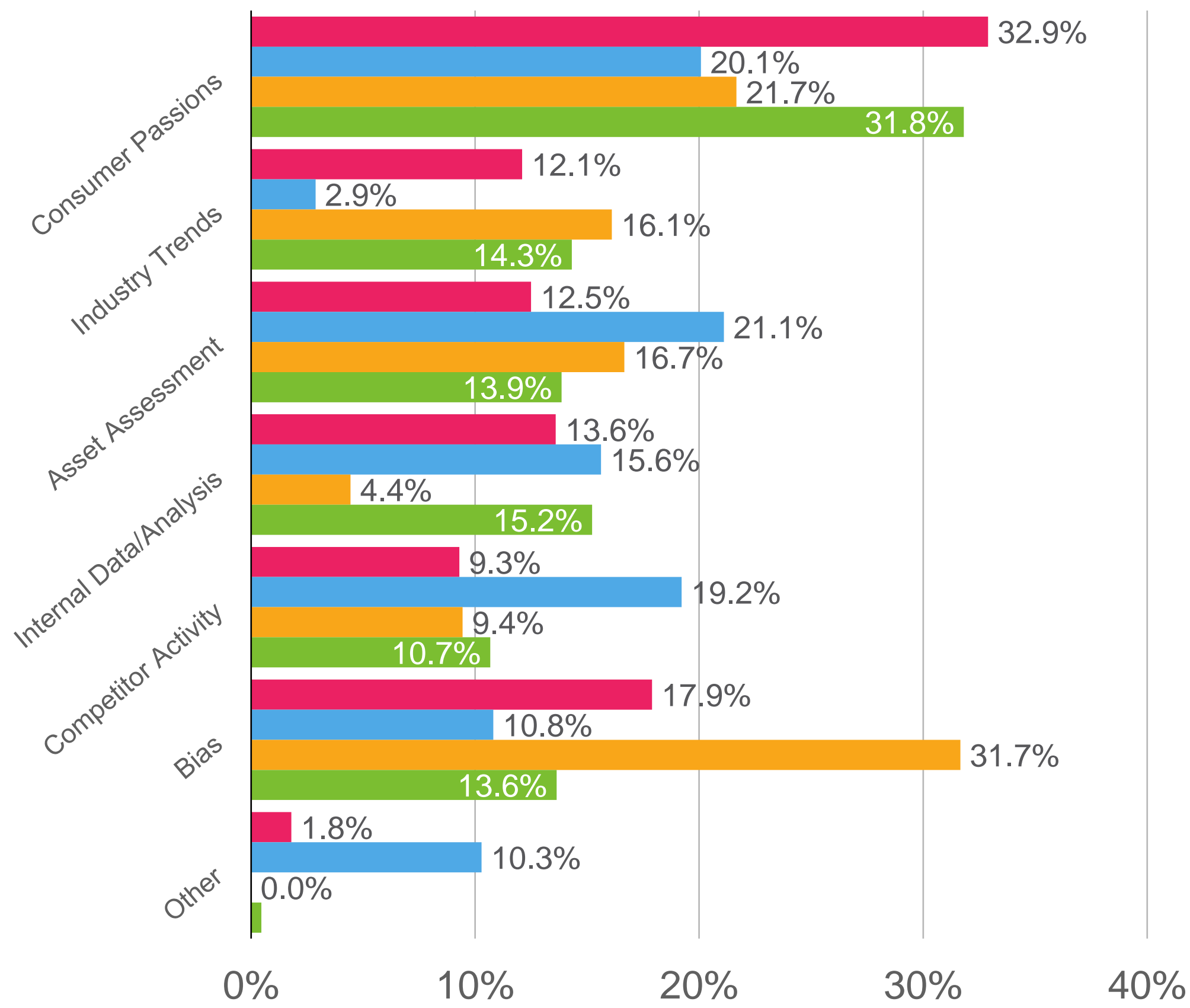
Zaileen Janmohamed

11. ROI from Sponsorship

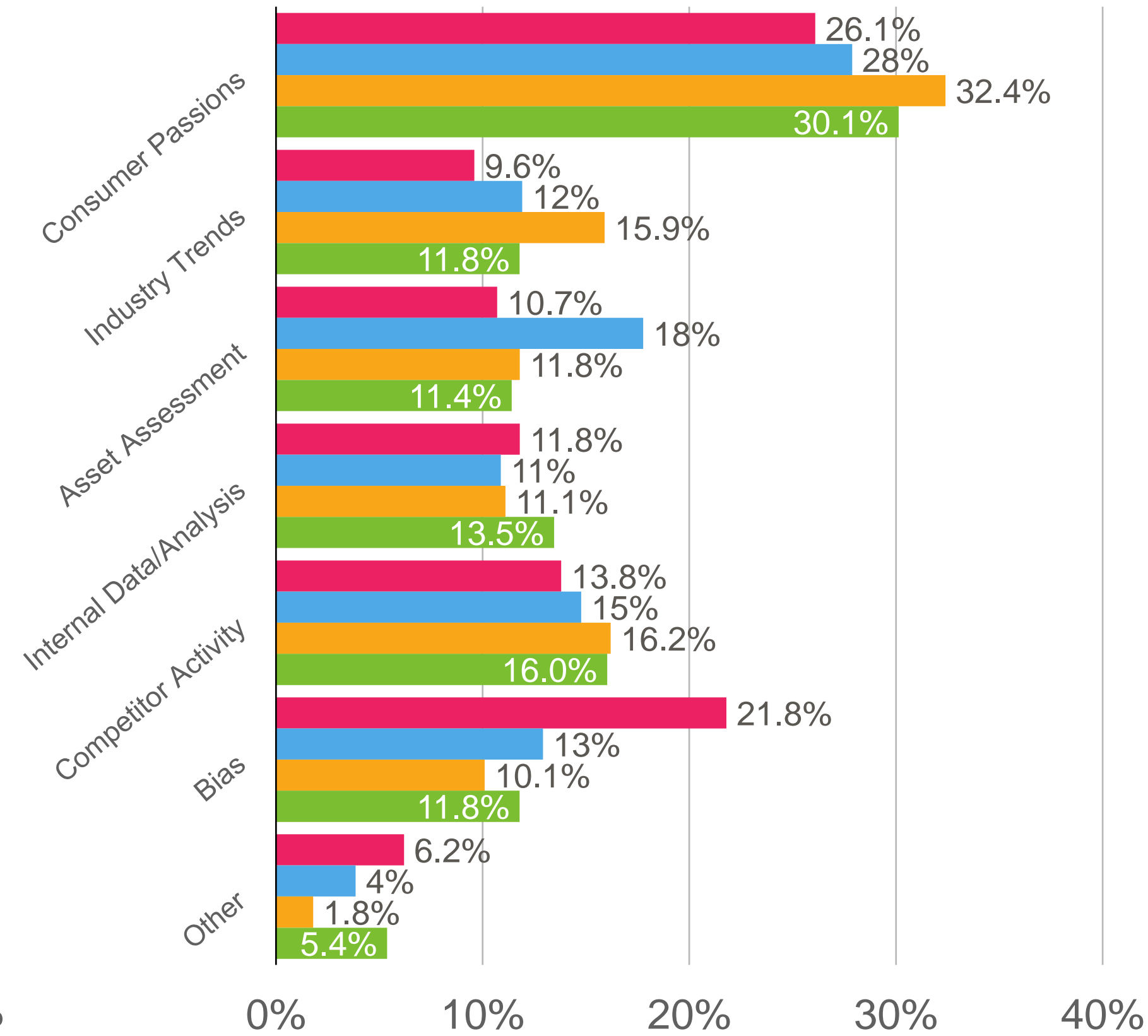
Adam Holt

DECISION MAKING

Criteria in Decision-Making:  Sponsors



Criteria in Decision-Making: Agencies on Sponsors Behalf



DATA

Majority

Of Decisions are About The Right Factors

NOTE ON 2019

Sponsors and agencies report 'bias' again down

Top answer in 2019 for both: "consumer passions"

2016 2017
2018 2019



2.

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3. Importance of Exclusivity
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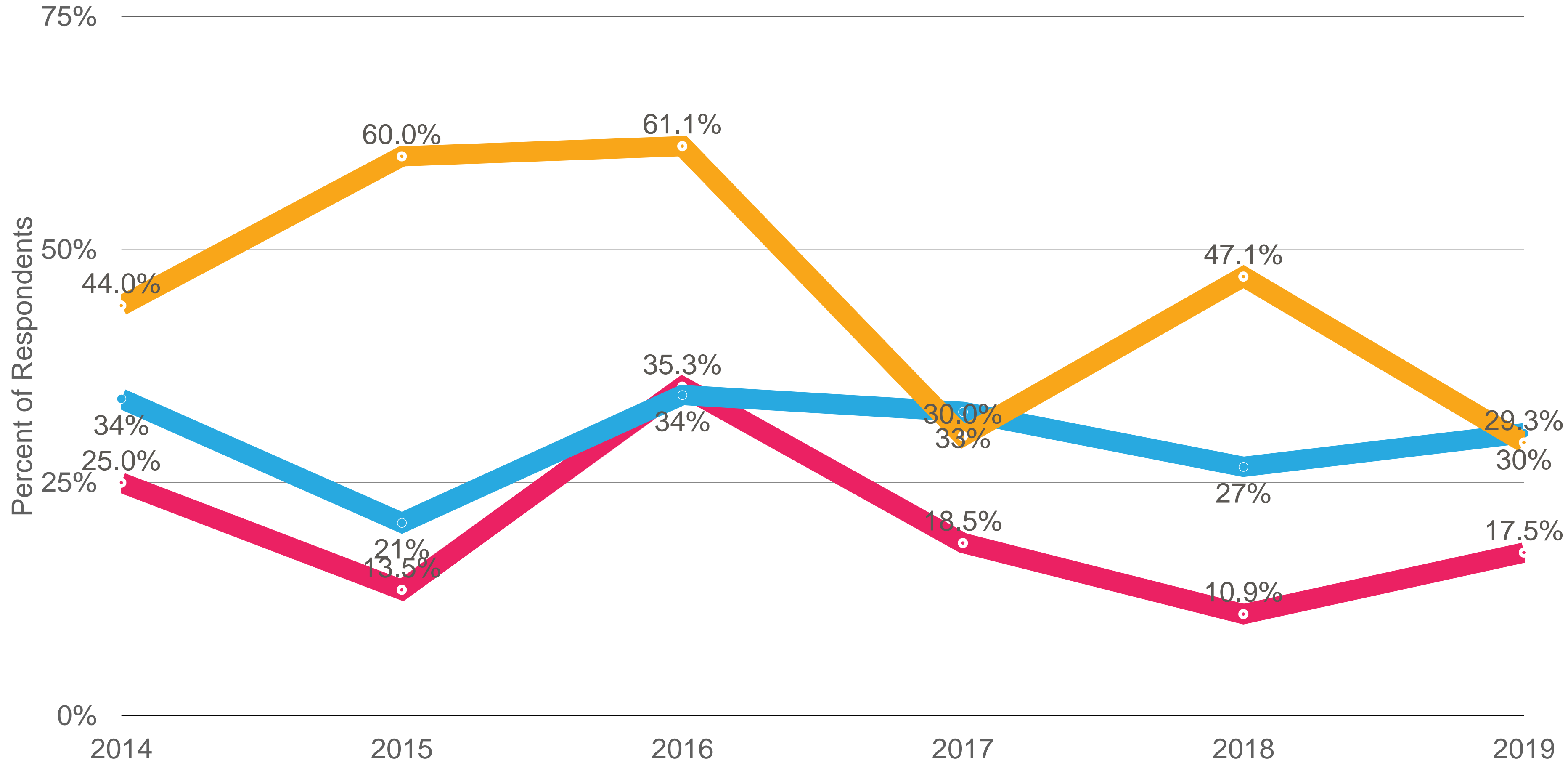
7. Service Deficiency
Andrea Shaw

9. Activation Gap
Zaileen Janmohamed

11. ROI from Sponsorship
Adam Holt

ACTIVATION: BRANDED CONTENT

Historical Activation Tactic that Best Drives Business Results



DATA



1ST

Branded Content is the best tactic for Sponsors, Properties, and Agencies

NOTE

All three stakeholder groups reported that branded content best drives business results, from an activation perspective.

- Sponsors
- Properties
- Agencies



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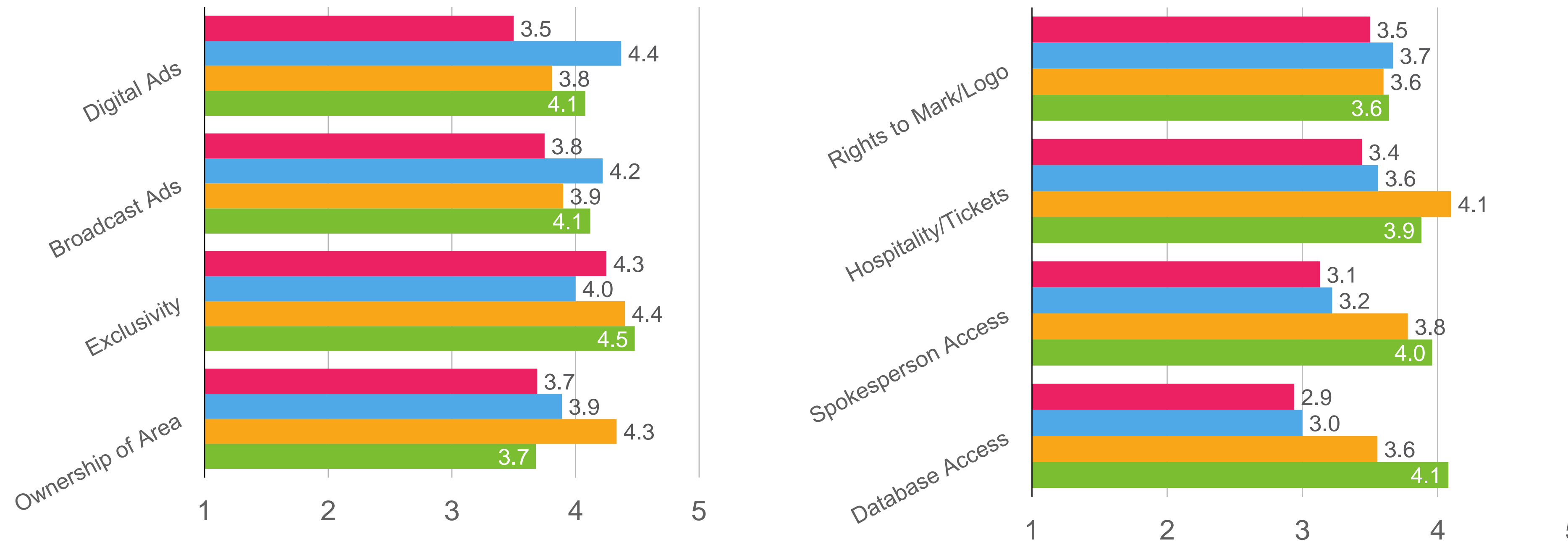
Zaileen Janmohamed

11. ROI from Sponsorship

Adam Holt

DEALS: VALUABLE BENEFITS

Most Valuable Benefits Identified by Sponsors



DATA & NOTE

2019 characterized by some change.

Exclusivity remained #1, but all access related items (database, tickets, spokesperson) increased over the prior years.

■ 2016 ■ 2017
■ 2018 ■ 2019

NOTE "Co-sponsorship" suggested by 7 sponsors under other (with average score of 3.8)



4.

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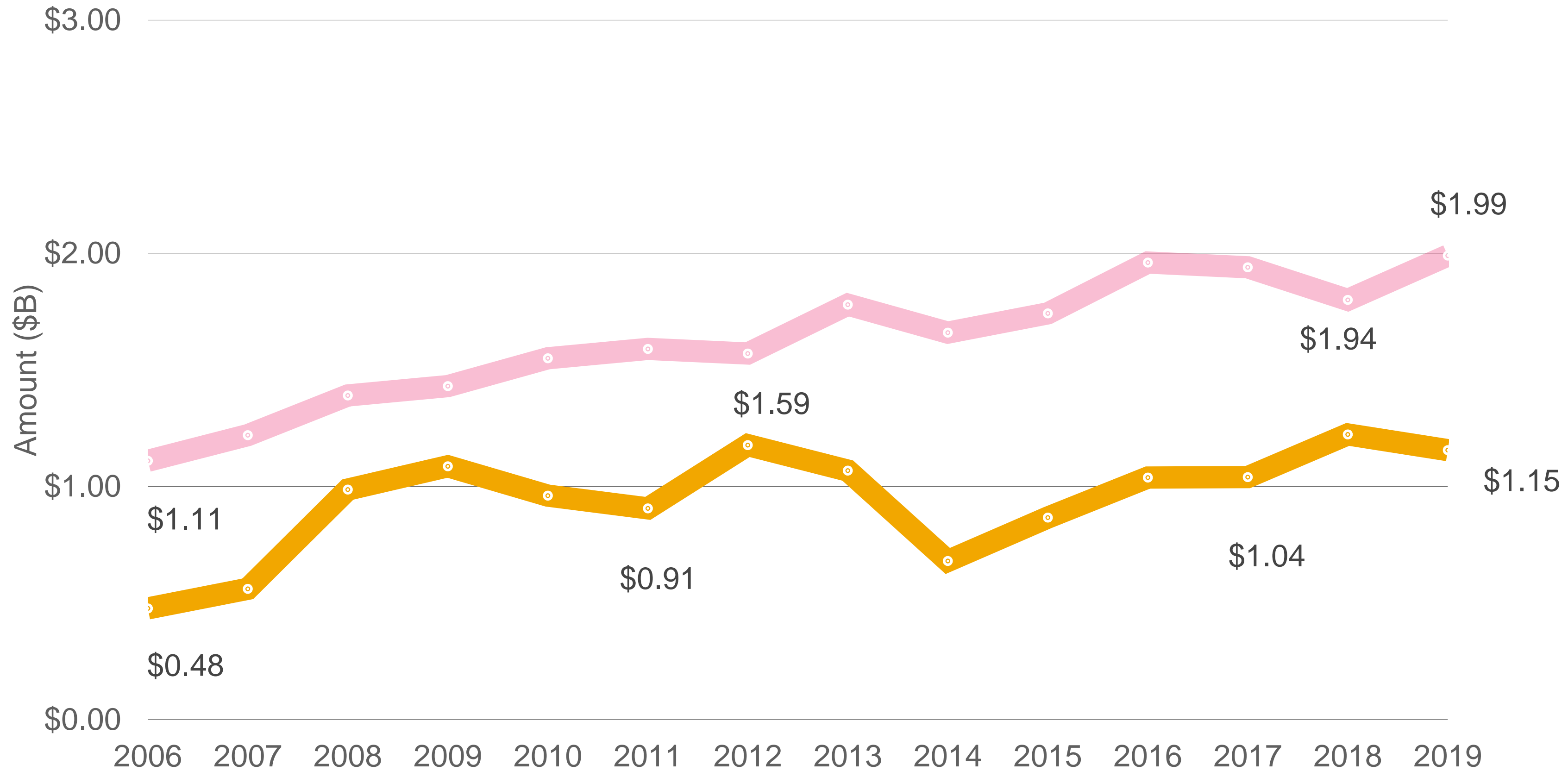
Zaileen Janmohamed

11. ROI from Sponsorship

Adam Holt

CANADIAN INDUSTRY SIZE

Historical Canadian Sponsorship Industry Size: Activation



DATA



0.58

Activation to Rights Fee in 2018

Key Observation: Total investment in activation has more than doubled in 14 years, up almost 250%

CAGR of total activation spend is **6.95%**.



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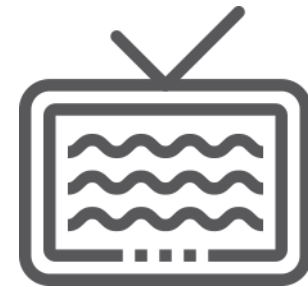
LARGEST SPONSORSHIP CATEGORY



48%
Pro Sport



22%
Amateur Sport

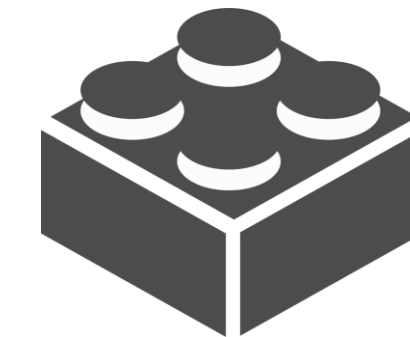


13%
Entertainment,
Tours & Attractions



9%
Festivals

DATA



Others

Arts (4%)
Other (4%)

Average Size of Largest Annual Deal: \$1.6M
Range: \$10,000 to \$25M



6.

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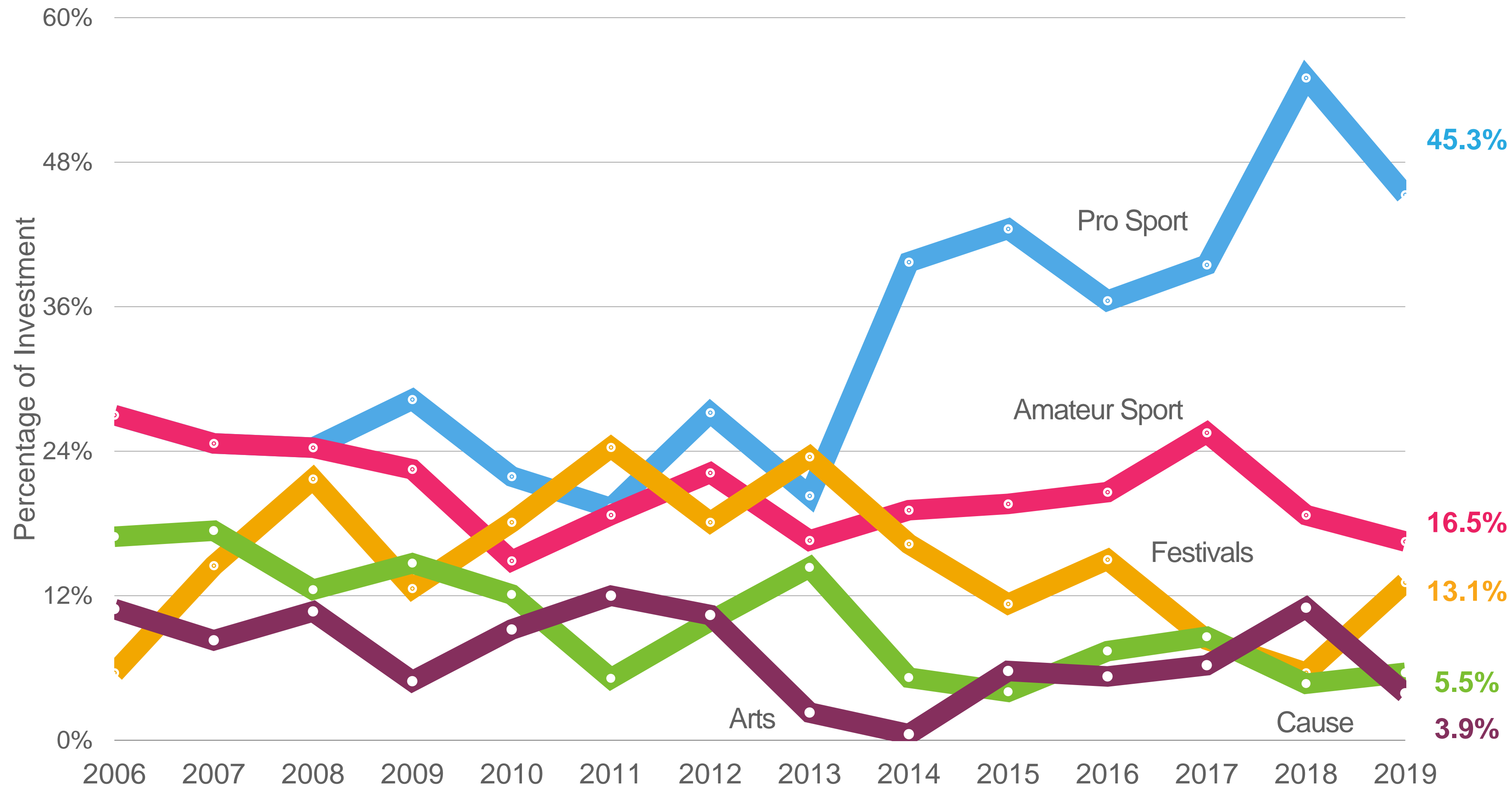
Zaileen Janmohamed

11. ROI from Sponsorship

Adam Holt

PROPERTY MIX

Historical Sponsorship Investment by Property Type



DATA



45.3%

of Investment is
in Pro Sport

NOTE

- Others:
- Other (7.2%)
 - Entertainment, Tours & Attractions (7.1%)
 - Education (<1%)
 - Media (<1%)
 - Municipality (<1%)



7.

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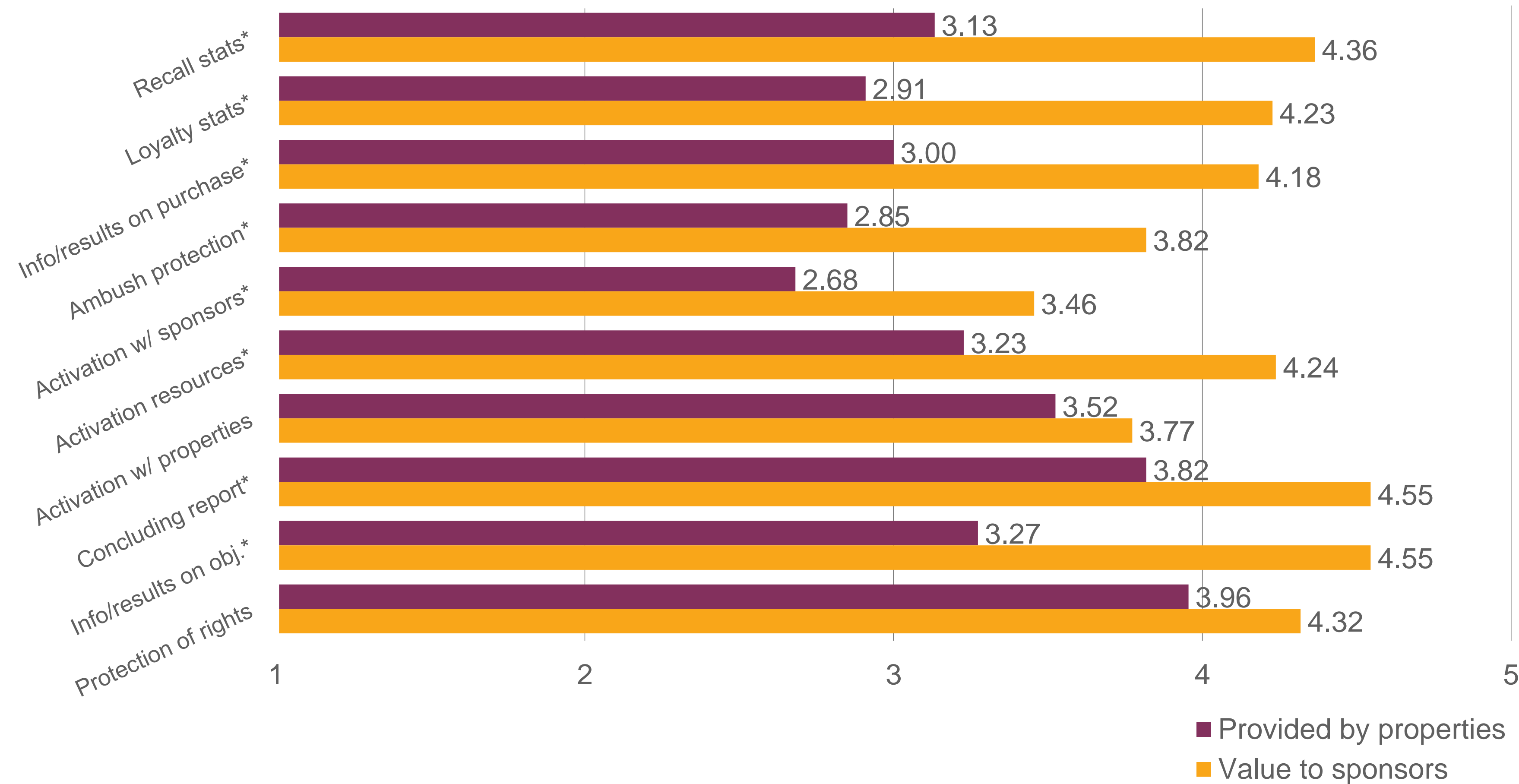
Zaileen Janmohamed

11. ROI from Sponsorship

Adam Holt

SERVICING: SPONSOR PERSPECTIVE

Services to Sponsors: Viewed by Sponsors



DATA



8 of 10
are Statistically Significant Differences (*)

NOTE

The servicing issue remains in Canadian sponsorship. This has been consistent for 14 years, with a few exceptions.



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Adam Holt

MEASUREMENT IS COSTING US SLEEP

Top Concerns	Meeting ^[SEP] Targets*	Demonstrating ^[SEP] ROI	Demonstrating ^[SEP] ROI	Other*	Demonstrating ^[SEP] ROI	Demonstrating ^[SEP] ROI	Meeting Targets** Evaluation/Measure	Fear about delivering value as ROI
Year	2012	2013	2014	2015	2016	2017	2018	2019

Sponsors

- 61% mentioned ROI/Value
- “Are we nimble and adaptable to changing local and global pressures, or have we locked ourselves into contracts that no longer deliver value?”

Agencies

- 57% mentioned ROI/Value
- “Effective measurement of ROI that captures the “value tail” of sponsorships versus immediate returns only”

Properties

- 48% mentioned ROI/Value
- “Lack of quality data in order to make informed decisions and run a sophisticated sponsorship program”

*Demonstrating ROI #2
**Demonstrating ROI #3



9.

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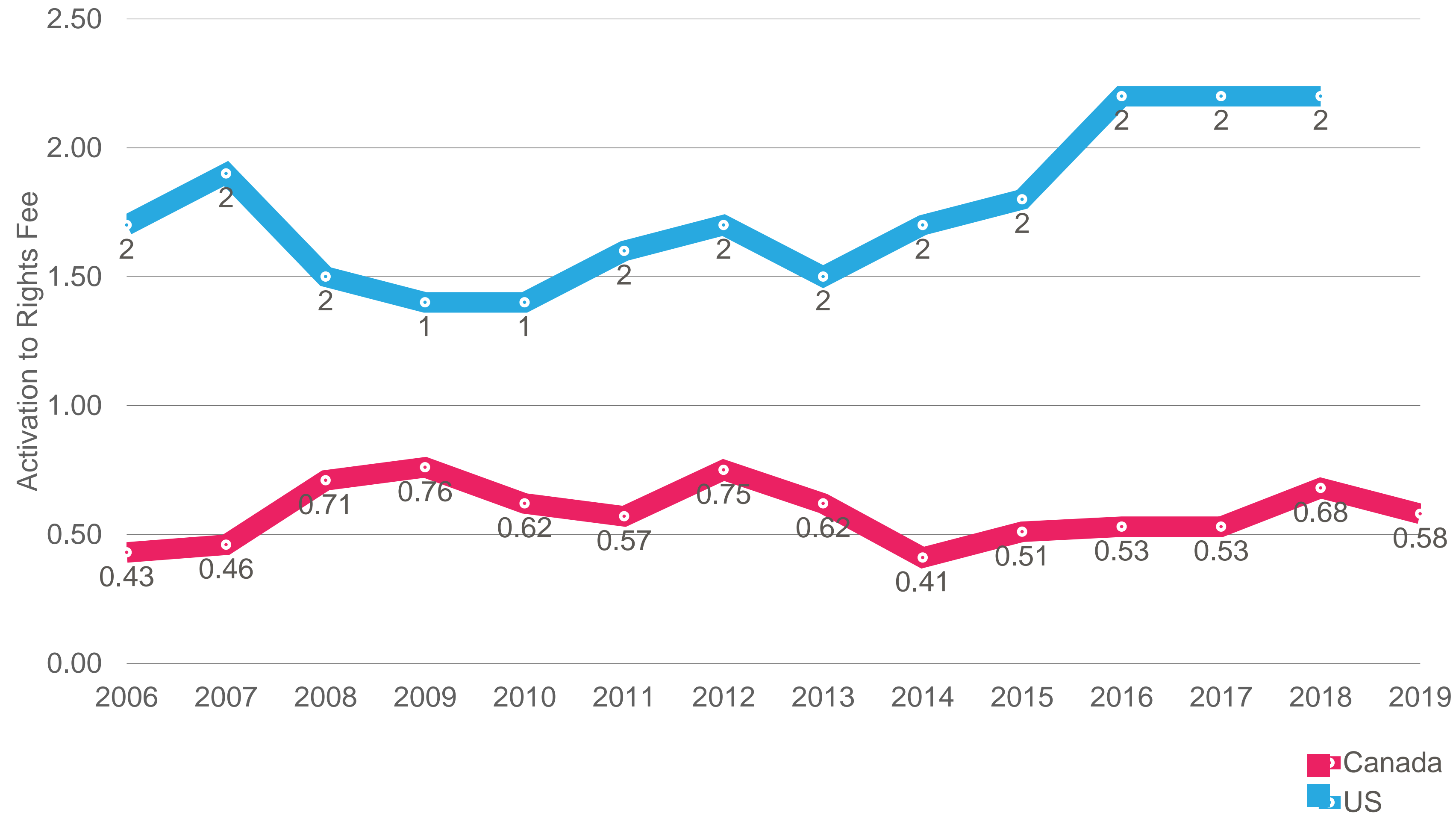
Zaileen Janmohamed

11. ROI from Sponsorship

Adam Holt

ACTIVATION: RATIO

Historical Activation Ratio: Canada & US



DATA



2.2

Most Recent
Activation Ratio in
US (from IEG)

The activation ratio in the US is close to being more than **4X higher** than in Canada.



10.

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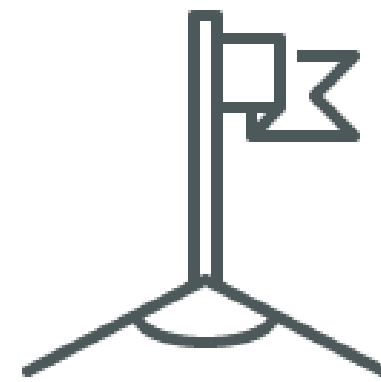
SPONSOR INVESTMENT: PROPERTY REACH BY SPEND

2019 DATA | 2018 DATA

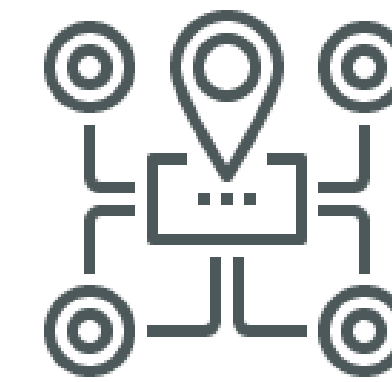
“Interesting Shifts but *Go Big or Stay Local* still holds”



15.3% | **11.8%**
International



41.0% | **36.2%**
National



3.6% | **20.4%**
Multi-Provincial



15.1% | **7.5%**
Provincial

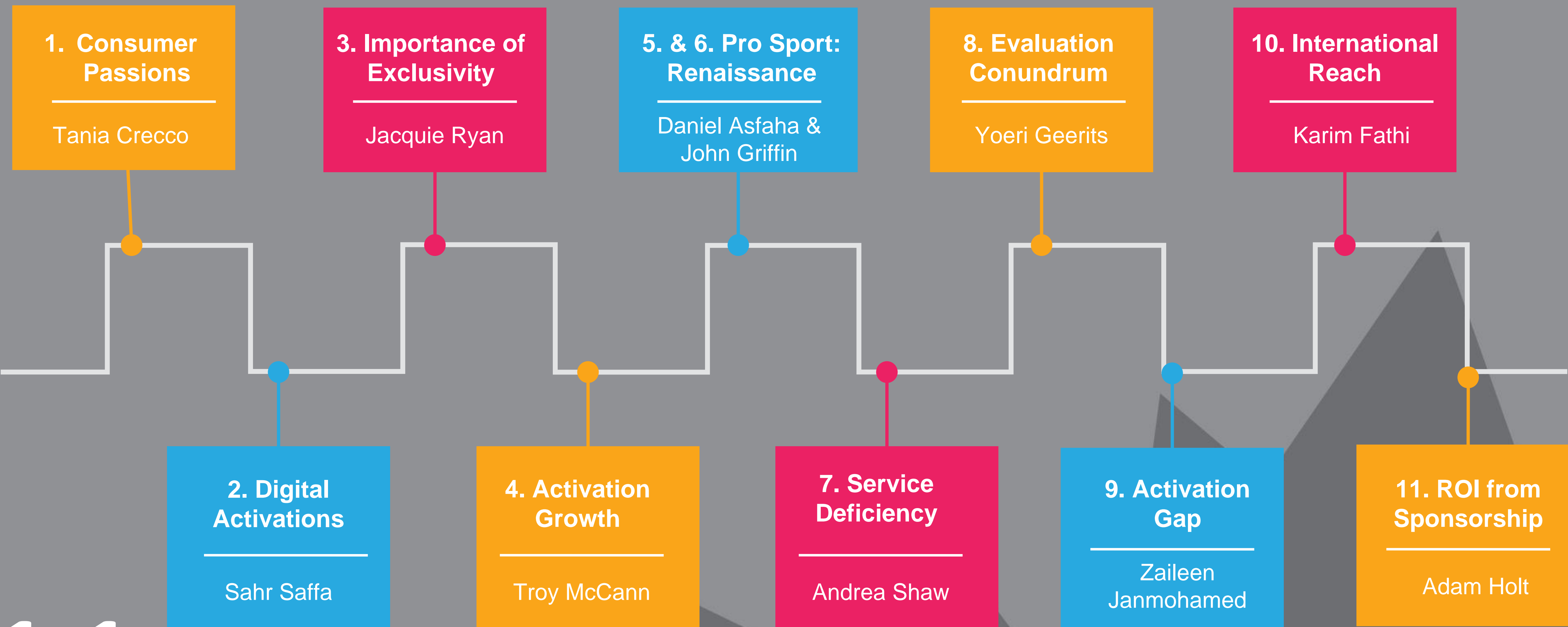


14.0% | **10.4%**
Regional



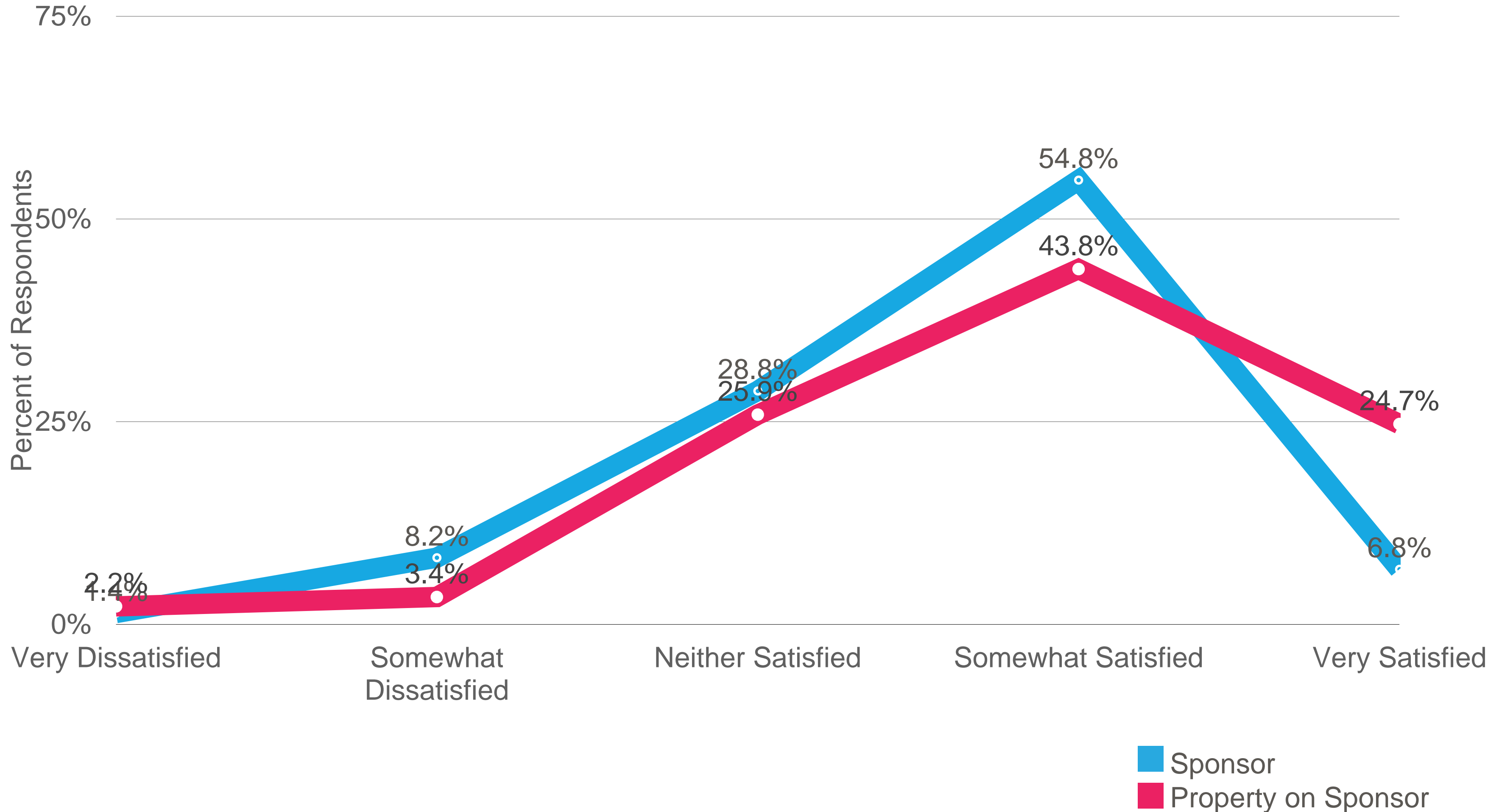
11.1% | **13.7%**
Local





SPONSOR AND PROPERTY VIEWS OF SPONSORSHIP ROI

Sponsor Satisfaction with ROI



DATA



3.38 (out of 5) Sponsor Mean
3.85 (out of 5) Property Mean

NOTE

The fact that 9 out of 10 sponsors are not 'very satisfied' is a major concern for the industry.

■ Sponsor
 ■ Property on Sponsor



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Tania Crecco

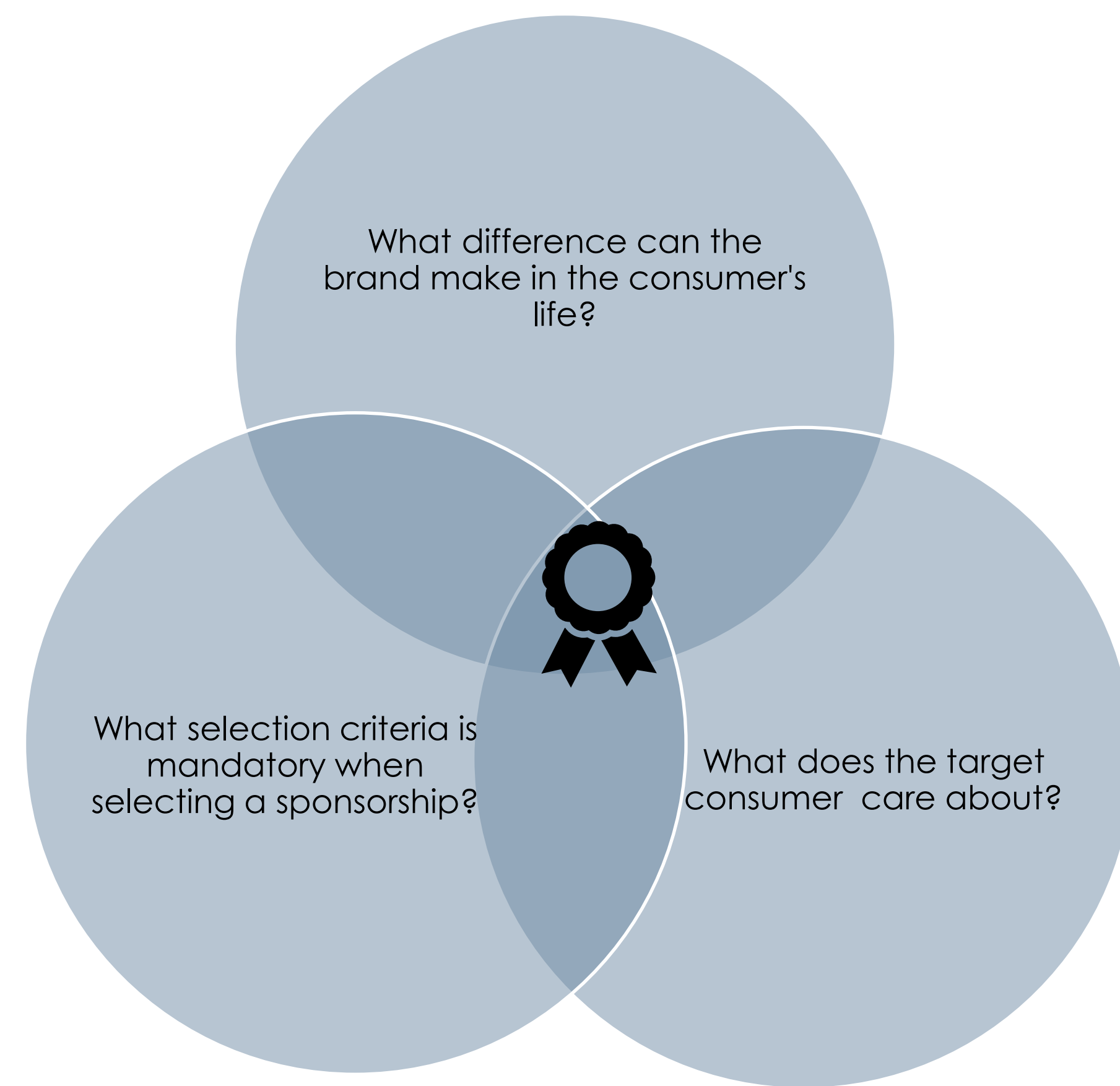
Head of Corporate Partnership
Dairy Farmers of Canada





Consumer Passions – #1 Focus of Sponsors

- ✓ Majority of decisions are about the right factors



The right sponsorship will be at the cross-section of the difference a brand can make , what our consumer cares about & what is mandatory



Sahr Saffa

Founder of C-Tribe Festival &
Marketing Director, AutonomIQ

 AutonomIQ





Jacqueline Ryan

Chief Brand and Commercial
Officer, Canadian Olympic
Committee



**SPONSORSHIP
MARKETING
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A UNIQUE VALUE PROPOSITION

Fuelled by passion and purpose. **Only** the COC connects brands to an **exclusive** and universal platform, enabling Partners to engage with Canadians through a unifying passion and embed their brand in our journey to transform Canada through the power of sport.



COMPETITIVE ADVANTAGE

We offer exclusive access to the most universal IP to reach ALL CANADIANS



#1 PARTNERSHIP PLATFORM

Our platform and expertise are proven to help Brands drive results



VIRTUOUS CYCLE

Your investment in the COC strengthens the Canadian Sport System



PASSION & PURPOSE

Together we can transform Canada through Sport



PREMIER NATIONAL PARTNERS | GRANDS PARTENAIRES NATIONAUX



NATIONAL PARTNERS | PARTENAIRES NATIONAUX



OFFICIAL SUPPORTERS | SUPPORTEURS OFFICIELS



OFFICIAL SUPPLIERS | FOURNISSEURS OFFICIELS



MEDIA PARTNERS | PARTENAIRES MÉDIAS

WORLDWIDE OLYMPIC PARTNERS | PARTENAIRES OLYMPIQUES MONDIAUX





Troy McCann

Sr. Director, Marketing
Wasserman Sports &
Entertainment



INNOVATIVE INVESTMENTS CREATING NEW CONNECTIONS



BRANDED CONTENT THRIVES



EMERGENCE OF THE ATHLETE





Daniel Asfaha
Co-Founder
Keevo

keevo



**SPONSORSHIP
MARKETING
COUNCIL CANADA**



John Griffin

Director, Corporate Partnerships
Toronto Blue Jays Baseball Club





Andrea J. Shaw

Founder & Managing Partner
TTG Canada (comprised of TTG
Partnerships & TORQUE Strategies)



WE HARNESS MOMENTS.



PASSION



LOYALTY



RITUAL

“Excellence is not an ideal to strive for, but an expectation to be met.”

– Andrea J. Shaw

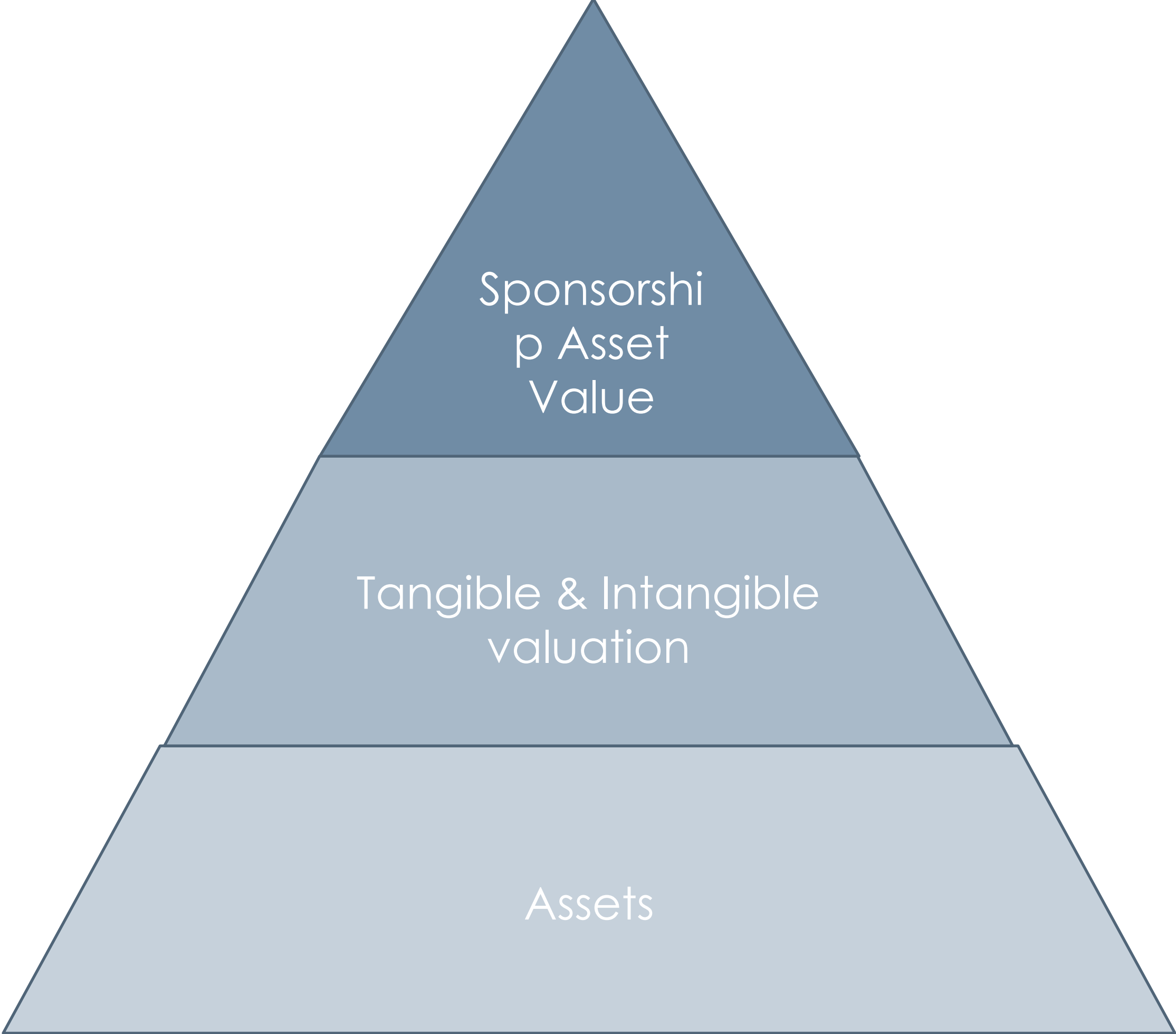




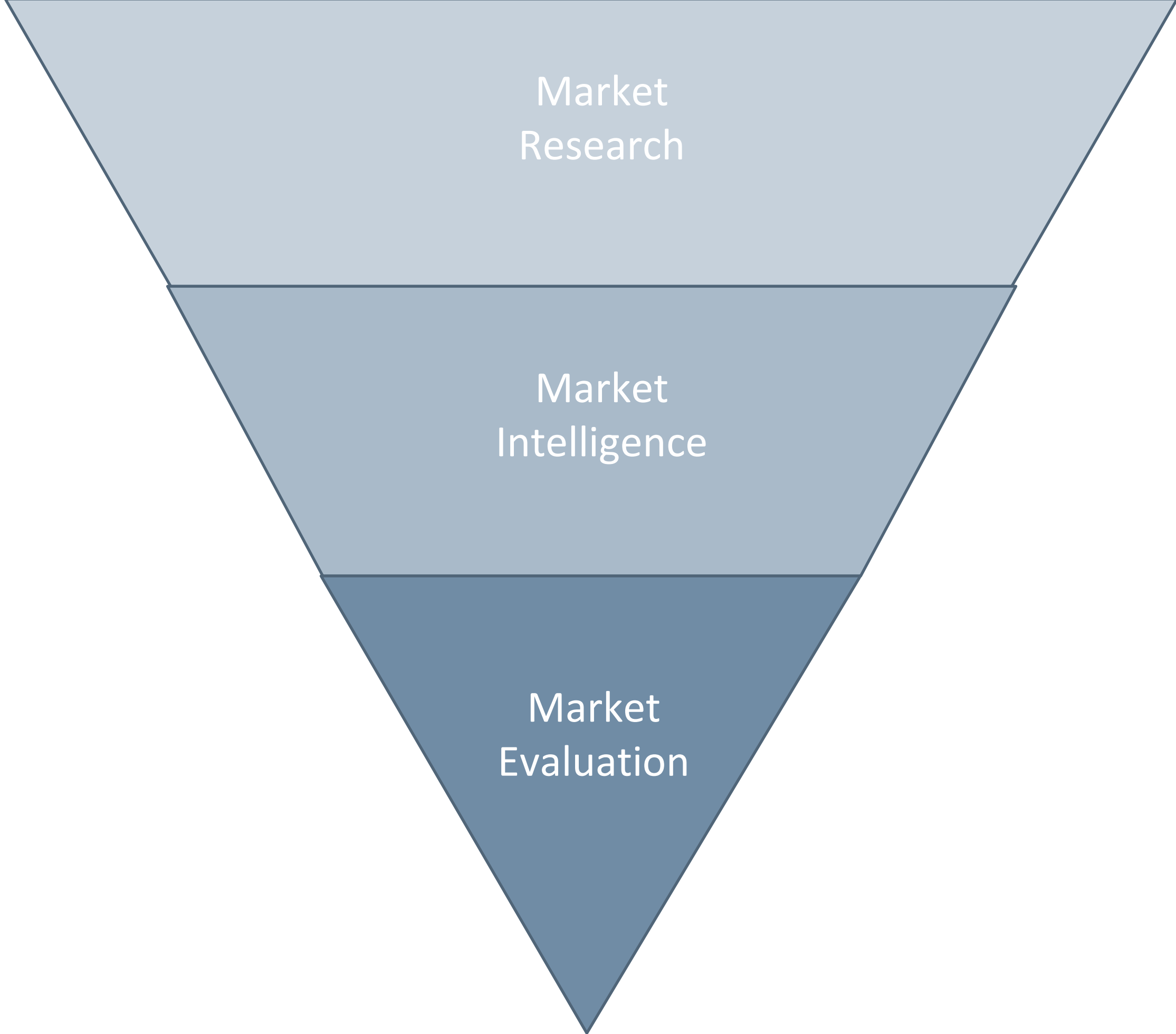
Yoeri Geerits
Partner and Consultant,
Charlton Insights



Bottom-Up Evaluation



Top-Down Evaluation





Zaileen Janmohamed

Head of Partnership Development &
Innovation U.S. Olympic and Paralympic
Properties





Karim Fathi
VP Digital (Americas)
SPORTFIVE

SPORTFIVE

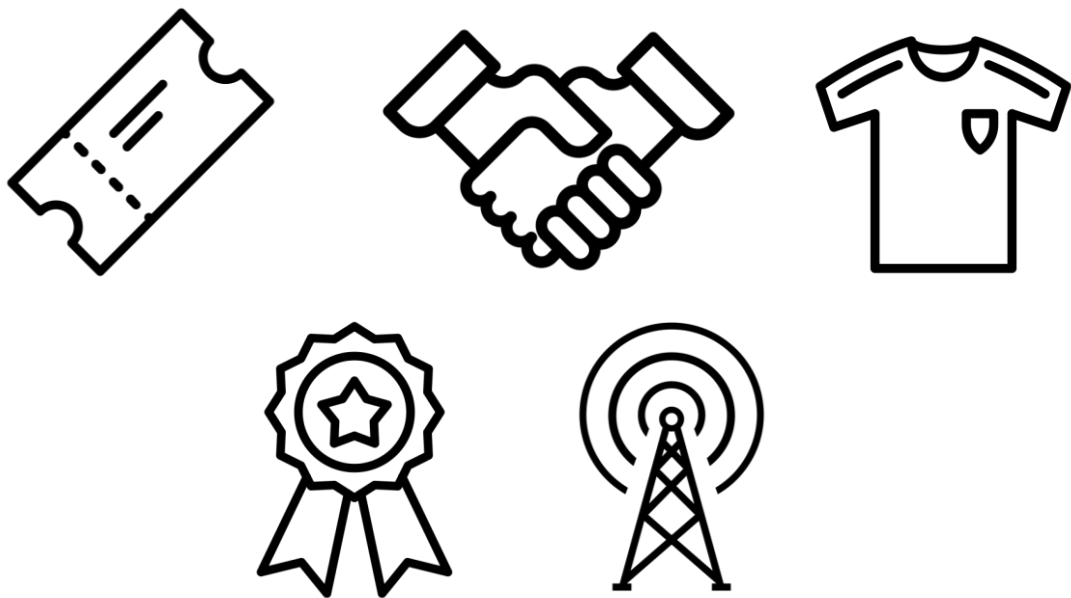


**SPONSORSHIP
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Why it makes sense for properties?

Growing and engaging audience

Generating new revenue streams



Premier League USA ✓
@PLinUSA

We're waking up early to watch 🇬🇧⚽ with you. The perfect one-two punch with @premierleague.

📍 United States 🌐 premierleague.com 📅 Joined January 2017

1,032 Following 166.2K Followers



Club	Handle	Followers
Everton in the USA	@EvertonInUSA	9,010
Liverpool FC USA	@LFCUSA	248.2K
Chelsea FC USA	@ChelseaFCinUSA	192.3K
Manchester City US	@ManCityUS	55K
Official AFC US	@OfficialAFC_US	27.7K

Case Study: Premier League in USA

Why it makes sense for brands?

Penetrating new markets/consumers

Driving sales/service



Case Study: Wizards x NEC



Case Study: LaLiga x Orange



Adam Holt
SVP Sales
FanAI Inc

The FANAI logo is displayed in white, bold, sans-serif capital letters within a dark blue square. The square is positioned in the upper right quadrant of a larger blue triangular graphic that points towards the top right corner of the slide.

FANAI



Speakers

Tania Crecco - Head of Corporate Partnership, Dairy Farmers of Canada

Sahr Saffa - Founder of C-Tribe Festival; Marketing Director, AutonomIQ

Jacqueline Ryan - Chief Brand and Commercial Officer, Canadian Olympic Committee

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Karim Fathi - VP Digital (Americas), SPORTFIVE

Adam Holt - SVP Sales, FanAI Inc



CSLS

CANADIAN SPONSORSHIP LANDSCAPE STUDY

www.sponsorshiplandscape.com

Thank you!

