



## SMCC: MARKET WATCH

August 19<sup>th</sup>, 2020



# SMCC: MARKET WATCH

## AT A GLANCE

INDUSTRY IMPACT

PROPERTIES

BRANDS

## RBC HERITAGE

## LOOKING AHEAD

### SPONSORSHIP VALUE IMPACTED BY COVID -19

**\$14 billion (USD)**

Sponsorship value needs to be made up in the US  
*(source: sportspromedia.com)*

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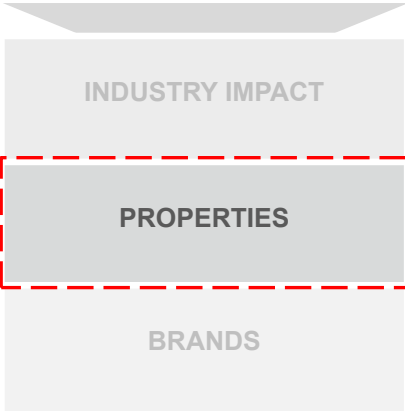
**\$44 billion (USD)**

Predicted global spend on sports sponsorships in 2020  
*(source: wpp.com)*



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## AT A GLANCE



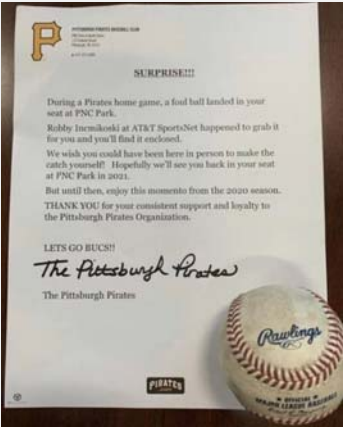
## RBC HERITAGE

## LOOKING AHEAD

### ENGAGING STAKEHOLDERS

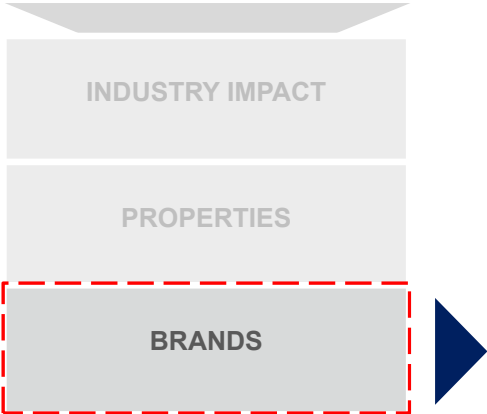
#### PITTSBURGH PITRATES

- Foul ball landed in a seat ticket holder's seat
- As a gift, the team mailed the ball along with a letter to the fan thanking them for their support and wishing them well



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## AT A GLANCE



## RBC HERITAGE

## LOOKING AHEAD

### IDENTIFYING OPPORTUNITIES

#RollingItForward

NHL

NHLPA

Purex

Cashmere

Sponge Towels

Scotties

Kruger Products



# SMCC: MARKET WATCH

## AT A GLANCE

2020 GOLF SEASON

BROADCAST

HOSTING

## RBC HERITAGE

## LOOKING AHEAD

March 12 <sup>th</sup> – 17 <sup>th</sup>	April 1 <sup>st</sup> – 6 <sup>th</sup>	April 16 <sup>th</sup>
<b>CANCELLED</b>	<b>CANCELLED</b>	<b>CANCELLED</b>
		
 	<b>RESCHEDULED</b>	<b>RESCHEDULED</b>
	  	 



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## AT A GLANCE

2020 GOLF SEASON

**BROADCAST**

HOSTING



## RBC HERITAGE

### BROADCAST

- The result of having no fans or hospitality build outs presents a significant challenge and opportunity
- Working with the Tour and broadcasters to maximize our onsite broadcast visible branding
  - Tee Backs
  - Digital signage
  - TV towers
  - In-broadcast features

## LOOKING AHEAD



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AT A GLANCE

2020 GOLF SEASON

BROADCAST

HOSTING

RBC HERITAGE

## RESULTS

Viewership:	+28% YoY (Sunday +44%)
Broadcast Exposures:	+78%
Broadcast Value:	+156%



LOOKING AHEAD



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## AT A GLANCE

2020 GOLF SEASON

BROADCAST

HOSTING



## RBC HERITAGE

### VIRTUAL CLUBHOUSE

- Provided a unique experience that engaged our clients in a new and unique way;
- **Three Virtual Fireside Chats**
  - Video invitation from Jim Nantz
  - Hosted by Jim Nantz, Davis Love III and our Team RBC Ambassadors
  - +500 HNW/UHNW clients

## LOOKING AHEAD



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RBC HERITAGE

LOOKING AHEAD

CONSUMER BEHAVIOR

FINAL THOUGHTS

## SHOPPING BEHAVIOR IS CHANGING

- **75%** of US consumers are trying a new shopping behavior
- Of which, **36%** are trying new brands
- **73%** intend on continuing to incorporate these new brands into their routine
- Gen Z and high-income earners are most prone to switching brands
- Millennials and high-income earners are in the lead when it comes to shopping online

(Source: McKinsey & Company; The Great Consumer Shift: Ten charts that show how US shopping behavior is changing, mckinsey.com, Aug 4, 2020)



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LOOKING AHEAD

CONSUMER BEHAVIOR

FINAL THOUGHTS

## FINAL THOUGHTS

“Sports marketing and the use of sport in marketing is a brand’s opportunity to connect with culture and this is a cultural moment” - Lisa Parfitt, Managing Director, Engine Sport & Brand Experience

“You advertise to tell people who you are, you sponsor to show them what you’ve got in common” - Tyler Mazereeuw, Chief Revenue & Marketing Officer CFL

