

# Sports Sponsorship

A cost effective investment  
for your brand



Earlier this year Manchester United agreed a £750m, 10-year sponsorship deal with Adidas, beginning in the 2015/16 season, in what they believe is the biggest global kit deal in existence.

With Manchester United currently having 27 official partners – including official noodle (Nissin), paint (Kansai) and tyre (Apollo) partners – it is clear the potential properties available to sponsor in sport has never been higher.

However, with so many investment opportunities – from sports events and teams, through to personalities and sport based CSR programmes – to choose from, how do brands ensure their sponsorship portfolio enables them to reach the highest number of people within their target markets for the most cost effective investment?



The most traditional and best starting point is to look at the volume of consumers that can be reached through sponsoring a range of sports.

**Earlier this year, SPA Future Thinking conducted an online research study with 519 UK based male sports followers aged 16+ to find out where and how sports sponsorship deals are achieving excellent cut through with the fans.**

Our research found strong evidence for the positive potential of sports sponsorship.

A total of 19.3m males aged 16+ either played, attended or watched on TV at least one sport.

The most popular sports are football (15.0m followers), Formula One (12.5m), tennis (10.1m), athletics (9.9m) and cricket (8.9m).

Whilst this tells us how many people you could reach through sponsoring one sport in isolation, how would a brand decide which is the best combination of sports to sponsor given there will inevitably be overlaps in following levels which will cause a diminishing returns effect?



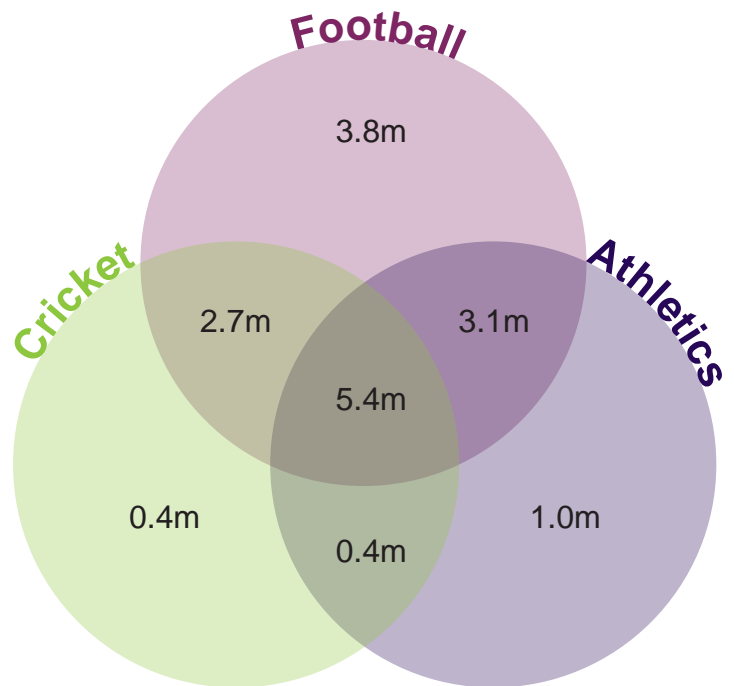


In our research we saw a varying range of overlaps in sports depending on which combinations we looked at, meaning the scale of the diminishing returns effect from being involved in multiple sports can vary substantially.

Taking the example here it can be seen that cricket fans were particularly likely to also follow other sports:

8.5m of the 8.9m cricket followers (95%) also followed at least one of football or athletics. So by adding cricket to a portfolio which already includes either football or athletics, a sponsor is potentially only reaching an additional 0.4m people.

On the other hand, athletics has more than twice as many solus followers (1.0m) despite having similar overall levels of following to cricket (9.9m vs 8.9m).



8.9m cricket followers but only 0.4m solus

1.0m solus athletics followers





Sports sponsorship has become a key tool for driving awareness for leading brands. We've seen this across all sports and especially in football, as typified in the way Barclays has invested in the Premiership over the past decade.

The Barclays Premier League partnership which has operated since 2001 is now one of the longest running sponsorships, with the most recent 3-year deal coming in at £120m.

This sponsorship is undoubtedly the reason why our study found that when followers of each of 13 sports were asked to spontaneously name up to 5 brands they associated with their sports, Barclays received the highest association of any brand with any sport: 146 of 402 (36%) football followers spontaneously mentioned Barclays in association with football.

Furthermore, Barclays was the 2nd most mentioned brand across all sports with 156 of 519 (30%) sports followers mentioning them.

With only an additional 10 people mentioning Barclays across all other sports (including golf and tennis, where Barclays has invested for a number of years), we can see an extreme example of the diminishing returns effect – caused by the huge success of the Premier League sponsorship.



1 in 3 followers of football spontaneously mentioned Barclays in association with football





So what does the future hold for any potential new Premier League backers, given Barclays' announcement that they would not be renewing the deal past the end of the 2015/16 season?

Of course the future cannot be predicted with certainty but after only 18 months of sponsoring England Cricket, Waitrose has already become the most mentioned brand by cricket fans (14%) – a remarkable achievement given the long-standing previous involvement of NatWest (8%) and npower (5%).

Similarly, since their Paralympic association in 2012 and subsequent deal with UK Athletics, Sainsbury's has overtaken Aviva as the most mentioned non-clothing brand by athletics fans (6%).

Based on this evidence at least, it is likely there will be no shortage of potential new backers for the most lucrative football league in the world.

The increasing openings in the sports sponsorship market provide significant opportunities for both rights holders and brands.

However, particularly given some brands already invest in huge numbers of properties; a more sophisticated approach to analysing the effectiveness of an entire sponsorship portfolio is required.

Whilst the Venn diagram approach is sufficient for understanding a small number of sports, it quickly becomes unmanageable when trying to optimise a large sponsorship portfolio!



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Measuring, evaluating and predicting advertising and sponsorship campaign effectiveness to optimise your sponsorship portfolio is increasingly complex as media usage fragments.

There are multiple sponsorship opportunities, with sports fans now bombarded with brand messages and campaigns across all forms of media; from team, stadia and TV sponsorship to mobile, social media and online collateral.

### This raises a number of key questions...

1. How do you make your sports campaign and message stand out and resonate with today's audience?
2. What are the most effective media channels to use?
3. What makes a campaign for your brand successful?

We help a wide variety of companies; from sports brands, regulatory bodies, media agencies and broadcasters answer these questions. Through bespoke surveys we use our knowledge of the sector to show what's working and what isn't, campaign appeal, and the fan journey through various campaign touch points.

**Campaign Optimiser 2.0** is our interactive tool that identifies which platforms have impacted most on campaign awareness, appeal and call to action. Click to [watch our 90 second video](#) to see how it enables you to:

- Evaluate the impact each media channel used in a multiplatform campaign has made on overall campaign awareness and on uplifts for key metrics.
- Input spend per platform to see which platforms over or under index comparative to spend.
- Alter spend or % spend per platform to see how things would have turned out differently with a different media outlay.



With surveys tailored to client's objectives, we also make sure we cover what we know is important to a sports advertising and sponsorship campaign: message tone and appeal, social media impact and fit with expectations for your brand.





With proven experience in sports business and sponsorship, combined with an in-house analytical team, SPA Future Thinking is able to tackle both straightforward and complex strategic projects across any sporting remit.

From evaluating sports sponsorship for leading global brands, to working directly with clubs, brands, rights holders, public organisations/governing bodies, publications and agencies/service providers our range of expertise includes evaluating:

### Customer behaviour and attitudes

From identifying the appeal of kit designs for football clubs (across markets and target consumer groups) to define sales and marketing strategies, to understanding catering needs at key sporting events.

### New proposition testing

Researching ways to improve and refine the experience as well as understand the potential of new experiences at sporting events, charity event experiences and stadia.



### Customer experience

From both the spectator and/or competitor experience we've helped understand the impact leading sporting events have had from understanding the spectator experience to maximising the potential of key sporting occasions in terms of the economic and social impact on the local and wider economy.

### Grass roots

Helping to place brands at the heart of sporting activities, we evaluate and track the impact of sponsor programmes on the community at a grass roots level; as well as gaining an understanding of brand awareness and trust towards sponsorship activity.

### Economic and social impact of events

From both the spectator and/or competitor experience we've helped understand the impact leading sporting events have had.

### Merchandising

Understanding the role of merchandise plays for sporting events and clubs to determine future needs and expectations





## Suzy Aronstam, Senior Director

Suzy has been with SPA FT for 14 years and heads up all of our broadcast sponsorship evaluation research, working closely with Sky, Channel Four and ITV.

She developed our extensive norms database for sponsorship, and has been instrumental in the development of Campaign Optimiser, our research tool for measuring the relative impact of different platforms within a multimedia campaign.

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## Chris Harvey, Research Director

Chris joined SPA Future Thinking in Summer 2014, having worked for 3 years at SMG Insight / YouGov. In his previous role he oversaw the delivery of all research solutions to sports governing bodies, rights holders, sponsors and agencies, working with clients including the Lawn Tennis Association, British Horseracing Authority, UK Anti-Doping, Goodwood and Barclays.

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SPA Future Thinking is dedicated to providing innovation, intelligence and inspiration through research that identifies new opportunities, evaluates your markets and drives business growth.

With combined industry experience of over 40 years and offices in the UK and Europe, SPA Future Thinking provide genuine research expertise and understanding across a wide range of industry sectors. Our staff have a mix of agency and client side experience, providing you with a better understanding of your business needs; we have the confidence to deliver not just findings but business recommendations that deliver success.

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