

**IFM Sports Marketing Surveys**
quality research for management action

IF FORUM 2009 – MEET THE PARTNERS

SPONSORSHIP – Trends Moving Forward

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About Us

The IFM group comprises three companies that operate together across a number of markets and sectors.

We offer our services on a national, regional and global level.



Parent Company
HQ Germany

Specialists in:
Sports
Media
Evaluation
Consultancy



Head Office UK

Specialists in:
Sports
Media
Market Research
Consultancy



Sub Brand

Specialists in:
Music, Film
Entertainment
Consultancy

We are a full service market research and media evaluation group. We are an independent company offering a quality service to our customers. These customers return to us year after year and campaign after campaign looking to us to drive forward new technologies, approaches and methodologies and in return our specialist staff take their thinking to another level and do not disappoint.

For more details please visit our websites:

www.ifm-sports.com

www.sportsmarketingsurveys.com

www.scomm-research.com

2009 Industry Report

Covering 30 countries

450 business professionals

All sectors and categories:

Companies & Brands 36%

Agencies 23%

Federations 17%

Rights Holders 10%

Media 6%

Public Sector 4%

Academics 4%

Venues/Attractions 2%

The topic areas covered in the survey were:

▶ Profiles

▶ Budget Forecasts

▶ Research & Evaluation

▶ Sectors:

▶ Charity/ Corporate Social Responsibility Programmes

▶ Entertainment

▶ Events & Promotions

▶ Media

▶ Sponsorship

▶ Sports

▶ Sports Goods

▶ Tourism

Sound Bites

- ▶ **64% of industry business professionals expect a **settling down** of the market with growth towards the end of the year**
- ▶ **Expectations are of a **decline in sponsorship revenues** – an average of **8% decrease** in 2009.**
- ▶ **Key phrases for moving forward:**
 - ▶ **Opportunity to Review and change**
 - ▶ **Engagement**
 - ▶ **Market outlook is optimistic**

Hot Topics

Rights Holders Provision of information and knowledge

Brands Return on investment

Federations Understanding the fan

Sports Goods Relationship building and accountability for athlete endorsements

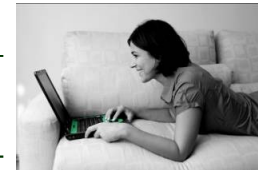
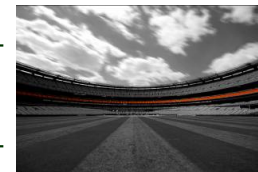
Events Engagement at all levels and justification for hospitality

Media Campaigns across all media channels with digital growing

Entertainment To work with sports and with cross platform learnings

Tourism Economic impact for tourism from sports events

CSR A definite place on the balance sheet.




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Key Findings for Federations



Looking Forward: Some cuts but settling down

	Total	EMEA	Americas	Asia Pacific
More cuts in budgets	33%	32%	28%	43%
Settling down period with few additional budget cuts	44%	44%	48%	38%
Looking forward to growth to the end of the year	20%	20%	21%	17%
No Opinion	4%	4%	3%	2%

**Sponsorship is important to brands
.. But it needs to be proven**

Sponsorship can offer a much wider reach and impact on a brand than advg

65%

Sponsorship is a must for any brand wanting to engage consumers & use benefits of a highly targeted campaign to change consumer behaviour

68%

Brands have to think twice about being involved in sponsorship

71%

*Source: 2009 IFM Sports Marketing Surveys – Global Industry Survey
% agree with statement*

Prove the sponsorship is right
Work with sponsors to evaluate

Pre valuation of sponsorships to justify involvement is now more for both the sponsor & rights holder

83%

Rights holders will need to provide more info & data to potential sponsors in a more competitive market place

87%

Brands are placing more importance on ROI

86%

*Source: 2009 IFM Sports Marketing Surveys – Global Industry Survey
% agree with statement*

Know more about your fans – not just age & gender!

Sporting governing bodies need to better understand their fans and put on events tailored to their needs

85%

Fans are interested in more than one sport & hence sports federations should work together

58%

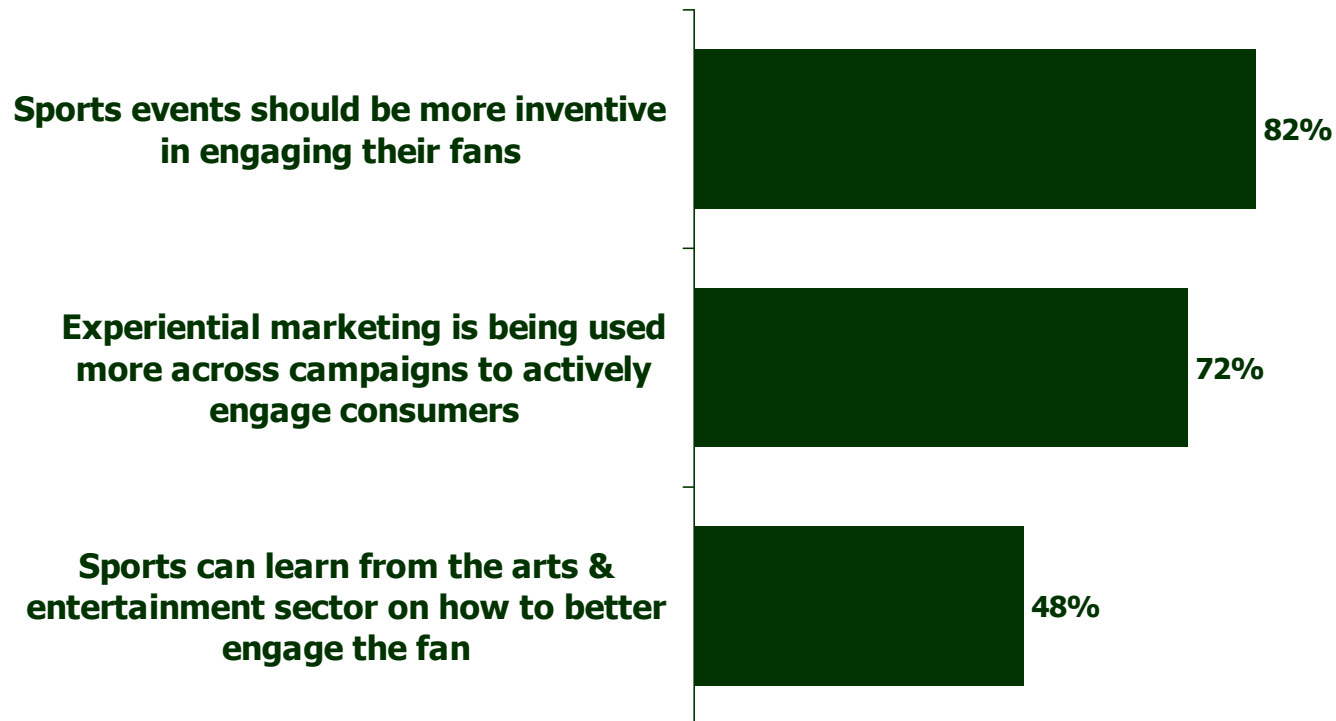
*Source: 2009 IFM Sports Marketing Surveys – Global Industry Survey
% agree with statement*

**Sport and events need to be more about entertainment.
There are revenue benefits too...**



*Source: 2009 IFM Sports Marketing Surveys – Global Industry Survey
% agree with statement*

**There is more to an event than watching the play!
Offer engagement with fans**



*Source: 2009 IFM Sports Marketing Surveys – Global Industry Survey
% agree with statement*

It is not just about TV!

Consumers expect to be able to engage with their sport or activity through all forms of media

81%

Digital media is fast becoming the norm rather than the exception

74%

*Source: 2009 IFM Sports Marketing Surveys – Global Industry Survey
% agree with statement*

For a copy of the full report let us have your business card

or go on-line to download

www.sportsmarketingsurveys.com

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