

2020
CORPORATE SPONSOR/ADVERTISER &
INDUSTRY REPORT

Presented to the Attendees of:
The 2020 National Sports Forum
By Seaver Marketing Group
February 2020

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Sports Sponsorship, Marketing & Promotions
Research Project
Analyzing the Opinions of the Top Sports
Advertisers and Sponsors

REPORT WRITTEN BY:

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OHIO
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HISTORY

Since 1996, and every two years thereafter, the National Sports Forum has presented to its attendees a “snapshot” as to how the country’s top Corporate Advertisers and Sponsors – the group most largely responsible for generating one of the largest segments of the industry’s annual revenues -- view the way that the industry (sports organizations, teams, events, and associations) have executed their responsibilities.

Originally presented at the very first Sports Forum (1996) in Colorado Springs, the NSF Corporate & Industry Survey continues in its primary objective of serving as an industry yardstick. The “mission” of the Corporate & Industry Survey is to isolate and identify many of the emerging trends in the sports industry, as well as give a look into how well corporations perceive the job that the industry is doing to help them in marketing their products and services.

SURVEY METHOD

This year we were able to draw upon the services of the NSF’s good friend in researching and presenting the *NSF 2020 Corporate & Industry Survey*: AECOM Center for Sports Administration at Ohio University. Conducting the Sponsor and Industry Research took several hundred hours to execute and compile and took place over a four-month period from October 2019 to January 2020.

Corporate Sponsor Research: The first half of this Report, the Sponsor Research, was directed by Jim Kahler, Executive Director at the AECOM Center for Sports Administration at Ohio University.

Sports Industry Executive Research: The second (back) half of this Report, the Industry Research, was created and executed by Seaver Marketing Group, under the direction of Carlie Dawson.

The two “parts” of this year’s NSF Corporate & Industry Survey were conducted separately (...and independently). The purpose for this was twofold:

1. **“Methodology”** - The Corporate Survey was conducted as an oral questionnaire seeking the feedback of twenty-five (25) of the top team/property sports sponsors and/or advertisers in North America. Each interview took, on average, 45 – 90 minutes to complete. We’ll refer to these folks as our “*Top Twenty-Five.*”

Our focus in creating the Corporate Survey was to go for “quality” over “quantity”. We were looking to sample the opinions of the leading sports marketing decision-makers working for the top corporations that currently rank amongst the leaders in sports advertising and sponsorship spending.

SURVEY METHOD (CONT..)

On the other hand, the Team Survey was conducted by Seaver Marketing Group entirely online. Seaver Marketing Group created a unique online industry questionnaire and systematically sent it out over a two-month period (November & December, 2019) to a wide range of sports industry executives from across a broad spectrum of sports and events – continuing the process until we received back a total of twenty-five (25) responses to match up with the “*Top Twenty-Five*” number that we pursued from the Corporate sector.

And while many of the questions in the Team Survey “mirrored” those posed to the Corporate Survey participants, the Team Survey also contained a section soliciting executive feedback as to their overall job satisfaction.

2. “Prejudice” - The other reason for conducting these surveys separately was that we (Seaver Marketing Group) did not want to run the risk that the responses of one survey sector would prejudice the evaluation of the other.

SURVEY CONFIDENTIALITY

As we have since we first undertook the Corporate Survey in 1996, we promised our respondents that we would keep their opinions and comments “anonymous”. This is done so as to eliminate any fears as to the possibility of there occurring any negative backlash to their statements. We’re looking for their candor -- not their “politically correct” corporate line -- as it is only through their frank insights that we can, as an industry, improve our product, and with it, the results that Corporate Sponsors and Advertisers would like to see from the industry.

By the same token, as some of the questions posed to the Team Survey executives, (particularly in regards to Career Satisfaction), were also potentially “sensitive” in nature, we did not require that Team Survey respondents include their name and/or team in their responses.

ABOUT OUR RESEARCH PARTNERS

Corporate Survey Research

The AECOM Center for Sports Administration – Ohio University



The AECOM Center for Sports Administration carries forward Ohio University's pioneering tradition in sports management education through its role as a resource center for the industry. The center links faculty, students, and alumni to sports-related organizations and businesses emphasizing research and harnessing knowledge to benefit the industry.

The AECOM Center for Sports Administration (CSA) is one of five academic centers of excellence in the College of Business at Ohio University and serves as a resource center for the sport industry by linking faculty, students and alumni to sport organizations and related businesses. The CSA conducts research on issues in sports business, with a focus on the practical application of knowledge to benefit the industry. Many of the studies conducted through the CSA are recognized as industry staples including this study on sponsorship with the National Sports Forum. The center also aids with planning and resource development to over 450 graduate and undergraduate students in the Department of Sports Administration. The center takes the lead with job placements for all on campus MSA students and has been a key factor in the program's #1 worldwide ranking by SportBusiness for six of the last eight years. Student success is attributed to industry consulting and capstone projects secured through the center for both graduate and undergraduate students. These projects, coupled with a state-of-the-art curriculum, provide students with a competitive advantage that is unparalleled and builds on Ohio University's legacy of being the birthplace of sports business education.

Ohio University has been the leader in preparing students for careers in the sports business industry since 1966, when it founded the first graduate program in sports administration.

Today, after over five decades since its birth, both the sports management program and the industry have grown exponentially. The sport industry's expansion and globalization present today's leaders with new challenges, ones that highlight the need for research, academic preparation and professional development. Ohio's AECOM Center for Sports Administration is meeting this challenge.

CORPORATE SURVEY PARTICIPANTS

AAA Automobile Club

HP

Anheuser-Busch

JBL

AT&T

Kellogg's

Buick

Mastercard

Central Garden & Pet

Morgan Stanley

Cleveland Clinic

Nationwide Insurance

Coca-Cola

Pepsi

Cooper Tire

PNC Bank

Emory Healthcare

Rakuten

Fanatics

Tampa Bay Times

Fifth Third Bank

T-Mobile

Gatorade

VCU Health

Grant Thornton

WinnDixie

CORPORATE SURVEY - CATEGORY BREAKDOWN

Participants by Industry

Number	Type	Share of Voice
4	Financial Services	16%
3	Automotive	12%
3	Beverages (Alcoholic)	12%
3	Beverages (Non-Alcoholic)	12%
3	Insurance	12%
3	Telecommunications	12%
2	Foods	8%
1	Clothing & Athletic Wear	4%
1	Electronic Retail	4%
1	Entertainment	4%
1	Home Improvement	4%

CORPORATE SURVEY - CATEGORY BREAKDOWN

Participants by Sports They Most Sponsor/Advertise In

Number	Type	Share of Voice
23	Major League Baseball (MLB)	88%
22	National Football League (NFL)	85%
21	National Hockey League (NHL)	81%
18	College Bowl Games	69%
18	Minor League Baseball (MiLB)	69%
18	National Basketball Association (NBA)	69%
17	Auto Racing (NASCAR, NHRA, IHRA, etc.)	65%
15	College Sports	58%
15	Golf	58%
14	Major League Soccer (MLS)	54%
11	esports	42%
10	Minor League Hockey (AHL, IHL, ECHL)	38%
10	Minor League Soccer (MiLS)	38%
10	Tennis	38%
9	Endurance Sports	35%
9	International Sports	35%
8	Minor League Basketball	31%
7	Arena Football (AFL, IFL)	27%
6	Lacrosse	23%
5	Extreme Sports	19%
3	Horse Racing	12%
2	Olympics	8%
0	Junior League Hockey	0%

2020
Corporate Survey

Results

CORPORATE SURVEY RESULTS

1. Corporate Opinion of Sports Marketing/Advertising Budgets for 2020:

When asked if their budget plans called for them to be spending more, less or an equal amount on sports in 2020...

- **27%** - Responded that they plan on spending **more** in 2020
- **38%** - Said an **equal amount** in 2020
- **35%** - Said that they would be spending **less** in 2020

65% plan on spending as much or more in 2020

Compare these numbers to the response we received when we asked this question in **2018**....

- **32%** - Responded that they plan on spending **more** in 2018
- **40%** - Said an **equal amount** in 2018
- **28%** - Said that they would be spending **less** in 2018

72% planned on spending as much or more in 2018

Compare these numbers to the response we received when we asked this question in **2015**....

- **41%** - Responded that they plan on spending **more** in 2015
- **48%** - Said an **equal amount** in 2015
- **11%** - Said that they would be spending **less** in 2015

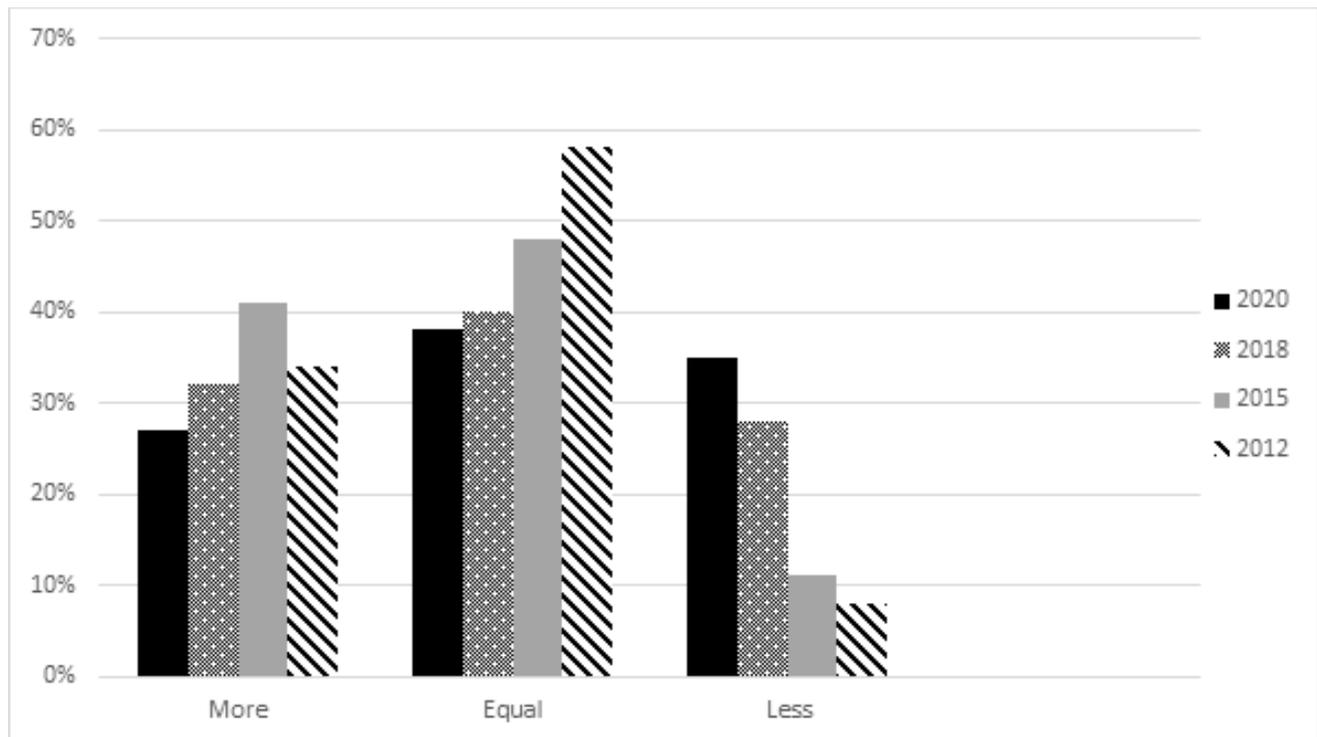
89% planned on spending as much or more in 2015

And let's take it back one more "round" to when we posed this question in **2012**...

- **34%** - Responded that they plan on spending **more** in 2012
- **58%** - Said an **equal amount** in 2012
- **8%** - Said that they would be spending **less** in 2012

92% planned on spending as much or more in 2012

CORPORATE SURVEY RESULTS



Analysis- Hmmm! Not to give anyone nightmares, but the long-anticipated economic slowdown that the “doom-n-gloomers” have been warning us about for a few years now might finally be happening. At least if this year’s “Top 25” Corporate Sponsors are to be believed.

But then again – maybe not. What we’re seeing happening behind the numbers of this year’s Corporate Survey may not necessarily reflect an economic downturn but perhaps the improved and enhanced efficiency of today’s corporate sponsors. One school of thought is that the sponsors could be “...pumping the brakes” on their sports sponsorship-spend more as a result of directing their money much more efficiently than in years past. The advent of analytically-driven evaluation programs and measurement tools is enabling sponsors to focus their resources on those things that give them the greatest return. The result is that corporations are starting to allocate former marketing dollars elsewhere and we (...as sponsorship sales people), will need to work harder to make our numbers.

Let’s give you some examples of what we’re talking about here by sharing with you a few soundbites from what they told us during our research.

- *“Recent changes in our overall business have called for expense reductions across a number of areas and our sponsorship budget was a part of those cuts.”*
- *“Our sponsorship spending will be down more than 10% (next year). It’s a function of the business environment – corporate cuts are coming down across all of our marketing.”*
- *“A lot of our sponsorship budget was shifted to another division of the company this year.”*

CORPORATE SURVEY RESULTS

But not all of the news was necessarily bad. Most of the comments we fielded called for sponsors to “...stay the course” on their 2020 spending:

- *“After some recent major investments and additions over the last couple of years – we are holding steady.”*
- *“While we are going through an expense reduction exercise with new business not growing as fast as expenses, we are fortunate to be keeping our sponsorship budget equal this year.”*
- *“Staying flat due to market dynamics. We’re expecting downturns in the market so our spending will probably stay flat in line with those projections.”*

Our Take-Away...

There’s no getting around the fact that these are the highest “spending less” numbers we’ve seen in years. (Even during the “Great Recession” of 2008-2009 the numbers were better!) Truth is, you’re going to find that guaranteed renewals with automatic escalators are going to become a thing of the past.

But one-way sharp organizations will deal with this is by aggressively cultivating NEW categories of sponsorship and developing new sponsorship inventory. In the coming years, we envision more teams and sports properties doing deals in such potentially new categories as Sports Gaming and Cannabis. Or creating/building out their “Non-Traditional Revenue” departments (...otherwise known of as Special Events or Event Planning departments). We’re seeing more sports organizations adopting an aggressive program of generating revenues from their ballparks, arenas and facilities when they’re otherwise dark.

And for those of you reading this report that are actively in the sponsorship sales business -- you’re in luck! Over the pages that follow, we’re going to share with you the recommendations, the advice and in some cases, the demands that sponsors are impressing upon us moving forward. Do this and you’ll flourish over these next few years ahead. Good luck!

CORPORATE SURVEY RESULTS

2. Given the current economy – what strategic changes, if any, will you be making with your **MARKETING** plans (...specifically your advertising and sponsorship plans...) for the coming year?

With this question, we switch the focus up a little bit ...steering the sponsor's conversation away from the sales and dollars component to asking them about their planned strategic changes in marketing. We get into discussing their plans and changes in such arenas as their: Advertising, Sponsorship, Activation and Evaluation.

But let's start by focusing on changes in **MARKETING**...

The two **MAIN THEMES** we heard here hubbed around doing more with lessand utilizing a heavier dose of Social Media:

- *"We're going to pivot based on change in the overall business – fewer sponsorship deals but choosing the best values with the most assets for the money."*
- *"2019 was about sports property portfolio streamlining with fewer properties the past two years but we spend more with the teams we stayed with."*
- *"Moving to a '...less is more...' approach with quality experiences for our sales representatives in the field to help them develop deeper relationships with current customer and prospective new business."*

And Social Media will be playing a larger role...

- *"We'll be taking better advantage of LinkedIn and our ability to reach C-Level executives by blending new content that ties to our sponsorship portfolio."*
- *"Looking to do more social media marketing. Specifically, Facebook and Twitter where we've seen better ROI and are able to better measure this return."*

This same theme cropped up when we evolved from asking about their Marketing plans in the coming year to specifically asking how their marketing strategy changes would alter their **advertising**.

(continued on next page...)

CORPORATE SURVEY RESULTS

“What strategic changes, if any, will you be making with your ADVERTISING plans...?”

Here again – their advertising strategies are leaning heavily towards Digital ...(and digital-driven programs), which became the clear-cut #1 theme here:

- *“We’ll be allowing marketing influencers to take over our Instagram account and help us promote our involvement with running events.”*
- *“Looking to do more social media marketing. Specifically, Facebook and Twitter where we’ve seen better ROI and are able to better measure this return”*
- *We’ll be maintaining our (advertising) expenditures but emphasizing content and social media.”*
- *“If you listened to what our Chairman of the Board said on CNN – we’ve learned how to monetize Facebook and Instagram so more dollars are being spent on those channels than anything else. Twitter is still a question mark, but our Chairman specifically called out Facebook*

“What strategic changes, if any, will you be making with your SPONSORSHIP plans...?”

As is usually the case when we got into this question as to how they’re changing their strategies on sponsorship – their responses can run “...all over the board” – but none the less very interesting.

One of the themes that has been getting louder over the years is how sponsors are more and more willing to look BEYOND sports to reach their market:

- *“We’re looking for more diverse demographics with greater integration. Break our sports silos with expansion beyond sports to entertainment.”*
- *“Moving from pro sports to cause marketing. There are literally hundreds of nonprofits we could get involved with in the area.”*

“What strategic changes, if any, will you be making with your ACTIVATION plans...?”

As it should be, activation (...on BOTH sides...), remains a core focus for today’s sponsors. (Later in this year’s Survey you’ll see that our “Top 25” sponsors said that the #3 greatest threat to traditional sports sponsorship is “Lack of Activation”. (And by the way – “Poor Servicing” came in at #5 this year. Food for thought.)

- *“We’re placing a greater focus on activating our partnerships in B-to-C markets. We’ve done a good job in major markets and now need to increase activation to grow our market share.”*
- *“Making an effort to increase our activation spend by 20%. We’re moving some of the dollars we saved on non-renewals into activation”*
- *“Lack of activation – we’re guilty of it, too. But with the cost of sponsorship today, if you can’t activate it, it can be like buying a Ferrari and leaving it to sit in the garage”*

CORPORATE SURVEY RESULTS

Getting into some of the activation specifics, product sampling popped up in a couple interesting quotes. If you're not doing so already, sampling might be an area that you start to sound your sponsors out about in your renewal talks. Here's what we heard:

- *"We'll have a much more concentrated effort on sampling as we want to introduce consumers to our new products."*
- *"We're sampling at 62% of our sporting events" Repetitiveness and branding."*

"What strategic changes, if any, will you be making with your EVALUATION plans...?"

While some of our sponsors have developed internal measurement tools, others talked about seeking outside Agency help to assist them in measuring the value of their sponsorship programs. And giving credit where credit is due – two measurement companies, Nielsen and GumGum Sports got special "shout outs" from this year's sponsors:

- *"We have developed an asset planning tool that will help us measure key metrics to see how different sales promotions are working at retail."*
- *"We have hired an outside agency to help provide us with monthly measurements that are focused on digital impressions. This will allow us to keep teams accountable in real time and be in a position to not have to accept a lot of make-goods after the season is over."*
- *"In 2019 we brought on a strategic sponsorship agency. As a result, we are more targeted – using the data they deliver us for directions going forward."*
- *"Traditionally we have relied heavily on Nielsen and Repucom, but the emergence of companies like GumGum Sports and the use of AI – those are the biggest changes I've seen over the last few years."*
- *We use Nielsen and GumGum to track our specific sponsorships."*

CORPORATE SURVEY RESULTS

3. In 2020, what percentage (%) of your overall sponsorship budget will be invested in properties in the following categories?

The NSF Corporate & Industry Survey first started back at the 1996 NSF in Colorado Springs ...but over the years, many of the questions we put to the sponsors have changed. We've added some new questions, tweaked some old ones ...or dropped questions entirely.

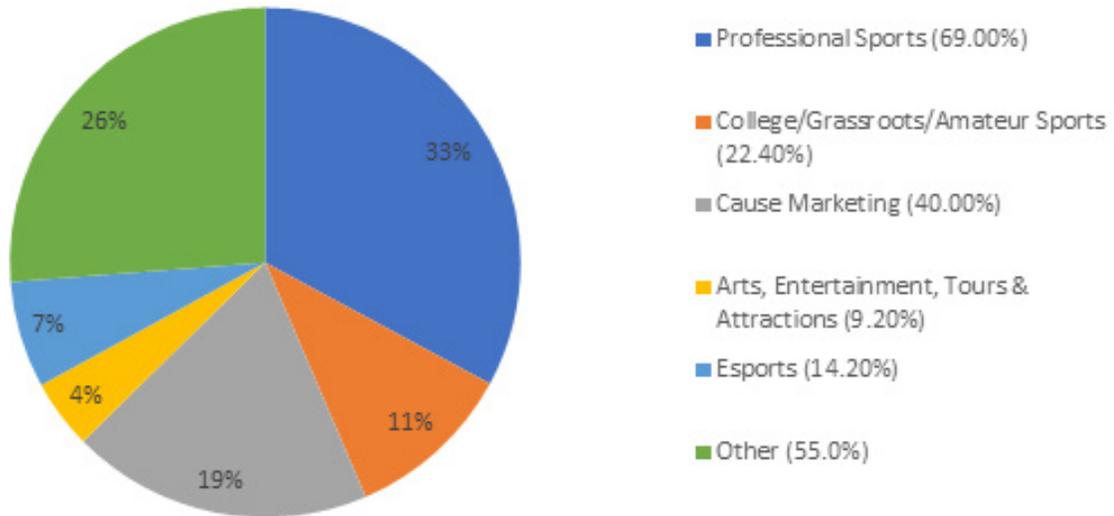
What follows here is one question we started asking for the 2015 Corporate Survey as we're interested in tracking where the sponsor's budgets are going. This year we asked them not only where they were spending their money (...which category of sports), but how much of their budget they were placing in those various categories.

Percentages of budgets vary, of course, with each sponsor – but what we're showing you here is, on average, how much of this year's "Top 26" sponsor's budgets they were committing to various avenues of sponsorship. Here's what they had to say, (note: numbers will add up to more than 100% as sponsors typically spread their dollars over several categories):

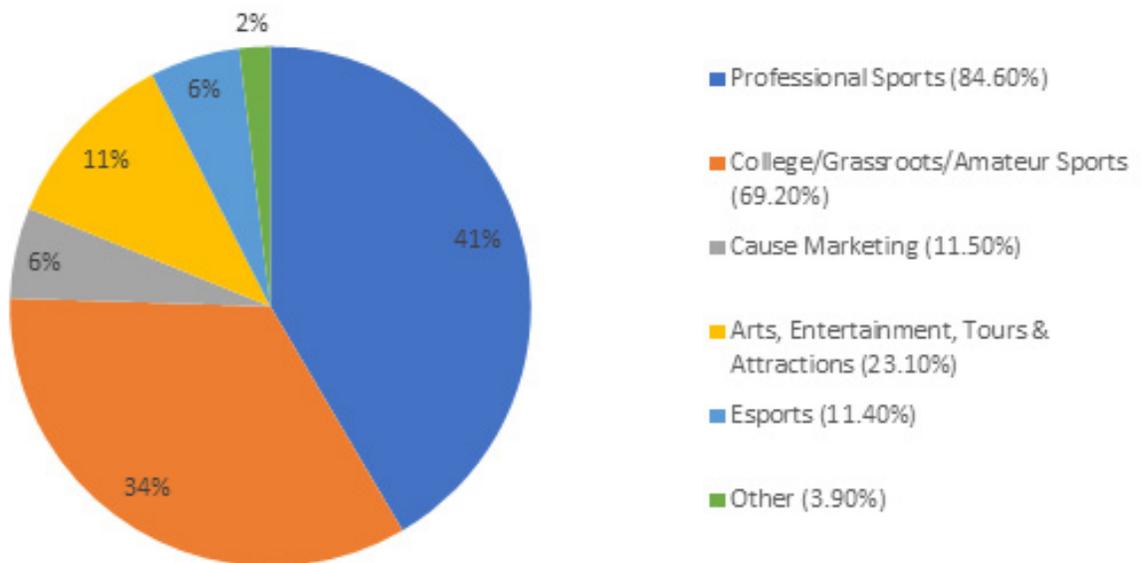
Category	What % of this year's sponsors will spend money in this category:	On average, how much of their overall sponsorship budget will they commit to this avenue of sponsorship:
Professional Sports	84.6%	69.0% of their overall budget
Olympic/Grassroots & Amateur Sports	69.2%	22.4% of their overall budget
Cause Marketing	11.5%	40.0% of their overall budget
Arts, Entertainment, Tours & Attractions	23.1%	9.2% of their overall budget
esports	11.4%	14.2% of their overall budget
Other	3.9%	55.0% of their overall budget

CORPORATE SURVEY RESULTS

Projected Sponsorship Budget



% of Money Spent in Each Category



CORPORATE SURVEY RESULTS

Notable Comments...

While professional sports is still clearly dominating in “...share of stomach” – some interesting sound-bites on this subject that caught our ear included:

- *“While our collegiate footprint is substantial, it only represents 15% of our total budget and is much more affordable than professional sports.”*
- *“High school sports will now receive 70% of our sponsorship budget that covers seven different states. We need to be where the moms are, and they have kids involved with high school sports.”*
- *“Great grassroots marketing is providing us with our strongest ROI.”*

CORPORATE SURVEY RESULTS

4. Are there any NOTEWORTHY changes to your marketing budget that you'll be making in the coming year?

It probably won't come as a surprise to those of you reading this year's Survey that are out there selling into the industry right now, but clearly the #1 responses to this question were TWO words: *Social* and *Digital*.

But whereas, based on their comments in the 2015 and 2018 Corporate Surveys, our participating sponsors were looking to get INTO Social and Digital... this year they're already into Social & Digital ... they're now just looking to immerse themselves MORE into these two arenas:

- *"We're taking better advantage of LinkedIn and our ability to reach C-Level executives by blending new content that ties to our sponsorship portfolio."*
- *"We're placing a much greater emphasis on digital media. We are seeing a very strong ROI here and it's much easier to measure."*
- *"We're looking to do more social media marketing – specifically Facebook and Twitter. We've seen better ROI and are able to better measure the return."*
- *"We're continuing to increase the percentage of our overall advertising spend on digital ads with 65% of our budget now being spent here. It's targeted, affordable and measurable. In 2011, we didn't spend any dollars here!"*
- *"We're moving away from traditional media and spending more and more on digital advertising."*

Also catching our eye on this question were responses on a number of different topics:

- *"More strategic integration of sponsorship into the fabric of our organization. For instance – employee recruitment, employee engagement and employee fundraising will become more important to our sponsorships."*
- *"We're revisiting our sponsorship portfolio and the deals that will be coming up for renewal at the end of 2020 as we want to keep our options open for the future."*
- *"We are setting aside flexible budget that will allow us to get involved with new and emerging platforms. What will be the next Athletic?"*
- *"We're making a concentrated effort to get more involved with esports at the collegiate level. More sweepstakes and competitions on campus with plenty of prizes for engagement."*

CORPORATE SURVEY RESULTS

5. What are the Greatest Threats to Traditional Sports Sponsorship (i.e. Ambush Marketing, Sponsor Clutter, Lack of Activation, Lack of Measurement, Cost, Team Performance, etc.)?

Again, here's a question that we only just recently started asking – beginning with the 2015 Corporate & Industry Survey. Our aim is to start taking the temperature of our Corporate respondents – what are the things that they're seeing going on out there that are turning them off on sports sponsorship? That said, we wanted to know what the Sponsors perceived to be the greatest risks to their sports programs:

	Element	'20 Score	Ranked in '15 Survey	Ranked in '18 Survey	Up/Down	Biggest Climbers/ Droppers '20 vs. '18
1	Too Expensive (Cost)	111	1	1	-	
2	Sponsor Clutter/Sponsorship Soup	99	2	2	-	
3	Lack of Activation	98	4	3	-	
4	Lack of Measurement	89	5	11	+7	+#1
5	Poor Servicing	81	3	6	+1	
6	Poor Evaluation	79	7	12	+6	+#2
7	Low Quality Activation	76	6	4	<3>	<#2>
8	Ambush Marketing	62	9	7	+1	
9	Player Endorsements Outside of Team Sponsorship	58	12	9	-	
10 (tie)	Poor Team Performance	56	11	10	-	
10 (tie)	Down Economy	56	8	8	<2>	
12	Sponsorship of Other Properties (arts, music, etc.)	54	9	5	<7>	<#1>
13	Political Environment	46	n/a	n/a	-	

CORPORATE SURVEY RESULTS

Analysis – Two things that we’re looking at here: One) are we “fixing” those problems that are plaguing us with our sponsors from one year-to-the-next? And Two) where are the biggest changes occurring in the “threats” category?

So let’s jump into it – notice that the sponsor’s two biggest headaches with the sports industry: Too Expensive (Cost), and Sponsorship Clutter haven’t changed in the last three Surveys. As an industry, we need to find more effective and efficient ways to deliver maximum value to our sponsors or we run the great risk that sponsors will start looking harder to find other places to park their sponsorship investment.

On the second topic – the biggest “climbers” on the threats list, Lack of Measurement and Poor Evaluation could be argued to be two sides of the same coin. And both are extremely “fixable” – it just needs to become a priority to us. Look at it this way, if we start doing a better job of establishing and measuring the return and value on a sponsor’s investment ...the easier it will be to make the case that our packages aren’t “Too Expensive” – which is what they’re thinking now.

As money starts tightening up out in the market, the more important it will be to demonstrate your value. Again ... you have only your sponsors to lose....

So let’s end this section by taking a listen to what our sponsors had to say on this subject:

Cost

- *“Clearly some properties are too expensive – more so on renewals. Especially for a B-to-B company like us. We are NOT overpaying!”*
- *“Never seen a property say: ‘We have measured this program and with what you achieved we’ve come to the conclusion that we’ve charged you TOO much. Next year we will deliver the same program at a discount’. Properties are always about increasing the cost regardless of results.”*
- *“Segmentation – Leagues and teams have broken categories down to the point that the automotive category is pulling out of major sponsorships. The level of greed has gotten to the point that certain categories will be looking to follow the automotives.”*
- *“Professional teams continue to increase rates and are not providing enough value to justify the extra investment.*

Clutter

- *“Sponsor Clutter/Sponsorship Soup are the real threats. We’ve cut our MLB sponsorships back from ten to 4 teams now due to clutter. College football has far less clutter.”*
- *“I would stress the clutter thing. That’s becoming more of the issue. You just can’t get noticed as much anymore. – if competitive brands, ...and non-competitive brands...) are also activating, we’re worried about our message being lost – causing us to not be able to write new business. “*

CORPORATE SURVEY RESULTS

Other Notes of Interest

On Players Getting More Involved in National & Global Issues:

- *“The National Anthem became a real issue for us and a reminder that politics and sports run together in our country. This has been amplified over the years with social media becoming more and more a part of our lives.”*
- *“The NBA and its players are strong advocates for social justice and while I support that – I am concerned that it could cause problems with our future business endeavors in China.”*
- *On the Economy – “While the economy is NOT a “threat” today, we are making a conscious effort to not sign long-term deals that are in excess of three-to-five years.”*
- *On Poor Service & Lack of Measurement – “If a team or property isn’t going to provide a real commitment to helping us, we won’t be around at renewals time.”*

CORPORATE SURVEY RESULTS

6. To What Medium are you Directing your Sports Dollars for 2020?

This is a question that dates back to the beginning of the *Corporate & Industry Survey* ~ with us, for relevancy-sake, just focusing below on what the “Top 25” had to say in the most recent Survey years. This will provide you with a really good snapshot of what sponsors, in general, see as being of most value to them in considering your sponsorship proposals and packages.

	Element	'20 Score	Ranked in '15 Survey	Ranked in '18 Survey	Up/Down	Biggest Climbers/Droppers in '20 vs '18
1	Social Media	107	1	2	+1	
	<i>Instagram</i>	<i>#1</i>		<i>1</i>		
	<i>Facebook</i>	<i>#2</i>		<i>2</i>		
	<i>Twitter</i>	<i>#3</i>		<i>3</i>		
2	Digital Media	82	2(t)	1	<1>	
	<i>Websites</i>	<i>#1</i>		<i>2</i>	<i>-</i>	
	<i>Webinars/ Webisodes</i>	<i>#2</i>		<i>1</i>	<i>-</i>	
	<i>Email</i>	<i>#3</i>		<i>4</i>		
	Banners/ Pop-Ups/ Screensavers	#4		3		
3	Mobile e.g; Or Coding	75	5	3		
4	Hospitality (e.g.: Suites)	68	7	5(t)	+1	
5	Alternative Media (e.g.: Pizza Box Tops, Apparel, Premium Item Giveaways)	66	8	8(t)	+3	#2(t)
6	Sales Collateral e.g.:Ticket stock/packaging, Poster, Brochure, Self-mailer	61	11	12(t)	+6	#1
7	Television	58	6	10	+3	+2(t)
8	Augmented Reality// Virtual Reality	56	n/a	4	<4>	<1>(t)
9	Tickets e.g.; Season ticket packages	55	9	5(t)	<4>	<1>(t)
10	On-site Sponsorship e.g.; gameday promotions, fan fest activity	53	2(t)	7	<3>	
11	In-stadium/arena e.g.:Pre-/In-game video, Closed circuit television feed, Signage, Charging stations, iBeacons (65)	52	4	11		
12	Out-of-home e.g.:Billboards, Bus stop/shelter (68)	45	10	8(t)	<4>	<1>(t)
13	Radio	37	12	14	+1	
14	Print e.g.: Newspaper ads, Magazine ads, Program ads	27	13	12(t)	<2>	

CORPORATE SURVEY RESULTS

Analysis – As you can tell in looking over this year’s results – not really much of a change at the top of the sponsor’s “Wish List” for any of these last three Corporate Surveys. (Although it’s noteworthy to see how much Social Media has pulled away from the pack and is clearly the most appreciated component of any sponsorship package.)

Also, interesting to see is how Sales Collateral has jumped up the ranks of sponsor popularity in just the last two years.

Looking over their comments – easily the TOP talking point with the sponsors was about Social & Digital. So let’s listen in...

Media they’re increasing their spend on:

Social/Digital

- *“We’re continuing to increase our digital assets according to scale. A small number goes to stadiums to see games. For example, most only see one NFL game in a lifetime. So, for us, moving to digital allows us to reach a greater audience with no geographic boundaries.”*
- *“Content and Social Media. Today there are so many different ways with social media to reach our consumers in an efficient cost-effective manner.”*
- *“Digital media is allowing us to reach the fans of the teams we sponsor in a very cost-effective manner. Analytics are helping us to better understand where to spend and reach the audience that we’re after.”*
- *“So much easier to measure engagement with social and digital media. With the ROI we saw last year, it was easy to justify an increase in spending here.”*

Media sponsors are shying away from...

Print & Radio

- *“Print media and radio are two areas that we’re definitely not looking to spend a lot of resources on. Those would probably be the least amount that we would spend on any marketing platform all year.”*
- *“Print – we’re repurposing those dollars.”*
- *“We’re just not seeing the return on print or radio. Trying to be able to quantify the return on those platforms is a lot more difficult.”*

CORPORATE SURVEY RESULTS

7. In your opinion...what sport gives you the “BEST BANG” for the Buck?

WINNER – National Hockey League

Two years ago, when we asked this question the National Football League was the overall winner with 25% of our respondents indicating that the NFL provided them with the best ROI from a price/value standpoint. This year the National Hockey League has emerged as the winner among our group of sponsors with 19% of the respondents singling out the sport.

Listed below is a complete breakdown of our last two studies by percentage.

Sport	2018	2020
National Hockey League	4%	19%
National Football League	25%	15%
Major League Baseball	10%	15%
College Football	33%	12%
National Basketball Association	2%	12%
NASCAR	10%	12%
esports	0%	4%
Extreme Sports	4%	4%
High School Sports	0%	4%
Player Endorsements	0%	4%

Analysis

The National Hockey made a considerable jump from 2018 when the league garnered only one sponsor that listed professional hockey as the number # 1 sport with this question. The results here can vary and definitely be influenced by the group of sponsors who participate (the mix changes every two years) but as always, we wanted to learn more about the WHY and what it was about the NHL that made the league stand out from its peers.

Listed below are several key takeaways on the NHL that caught our attention and focus with the number of home games, service, exposure and overall cost of sponsorship:

- *“NHL because number of games, arenas themselves lend themselves to other events, more frequency. Branding elements are part of the game and overall we are very pleased with value we receive on our investment.”*
- *“The NHL is a priced product and the frequency of messaging opportunity for us is strong.”*
- *“The teams we sponsor in the NHL tend to work harder and are willing to go the extra mile for us.”*
- *“The exposure you’re getting is over the top. More frequent, more a part of the inner workings of the community.”*

CORPORATE SURVEY RESULTS

Coming in as a close second was both the National Football League and Major League Baseball which both secured 15% of the respondents. Scale was a factor here but for different reasons with the reach of the NFL via television ratings and fans across the country and the number of occurrences / home games that MLB and its teams can provide a sponsor.

- **“Major League Baseball** - Number of games and media equivalences along with the ability to entertain many current and perspective customers over the course of a long season.”
- **“Major League Baseball** - Length of season and number of occurrences. We are also getting better at cultivating relationships with fans that don't attend the games but follow their favorite teams via social media, TV and radio. “
- **“NFL** - The scale is massive, and its seasonality also works well for us. The league is doing a solid job of turning the sport into a year-round play with the draft, combine and training camp coverage.”
- **“National Football League** - It's expensive but the reach and assets we have are still our most effective investment in sports.”

Other interesting takeaways and respective sports: While not a substantial trend we thought these comments were interesting because it reflects the diverse nature of our sponsors overall objectives.

- **“College Football** - Reach and scale outside the stadium is strong and the passion of these fans is what we are after.”
- **“esports** – Provides us with a huge bang for our buck. League of Legends, audience is massive. 100 million people watch the final. This is a community. Baseball and the NFL are not growing as much.”
- **“High School Sports** – Over investment here has grown over time and we have found it to be grass-roots marketing at it best. If our target market is mom's, there is no better way to reach this group than through their children who participate in high school sports. Compared to our investments with professional sports we are reaching real scale here that is costing us pennies on the dollar.”
- **“Player Endorsement** – Our agreement with our top professional athlete gives us a great way to bring our brand to life given his popularity and likeability.”
- **“Red Bull Racing** - Technology is part of their deals and we can amplify that story. We help them achieve their desired outcome and they are flexible. Access to their execs and cars. Very directed and strategic with no waste.”
- **“NBA** - Tends to be a smaller audience but the culture they have created is so important to the sport. We have found the right way to tap into the NBA and are seeing positive results.”

CORPORATE SURVEY RESULTS

8. If money were not an issue, are there any sports you'd be interested in getting involved with?

With the recent success of the US Women's Soccer team winning their fourth World Cup Championship combined with the expansion in Major League Soccer, the sport of soccer was the runaway victor in this category receiving a 35% response rate.

By contrast, two years ago the runaway victor was esports when it received a response rate of 27% followed by college sports (15%) and soccer (12%). This year esports didn't disappear completely but only received a response rate of 4% and was one of eight sports that made our overall list.

U.S. Soccer's recent partnership with Procter & Gamble, where the CPG giant donated more than \$500,000 to the team's players association is a good example of the interest in women's soccer. The New York Times recently reported that P&G wanted "to be on the right side of history" regarding equal pay for all USA Team members with this donation.

Charlotte is one six teams joining Major League Soccer over the next three years with Nashville, Miami, Austin, Sacramento and St. Louis. Expanding and establishing a larger footprint has been seen by many industry experts as an essential move by MLS to secure future television rights fees needed to reach its stated goal of becoming one of the top leagues in the world by 2022.

Listed below are the three sports that jumped out on this question with only three sports receiving three or more mentions:

Sport	% of Respondents
1. Soccer	35%
2. College Athletics	17%
3. Player Endorsements	9%

So, what did we hear from our sponsors on soccer?

- *“Major League Soccer - With expansion going on and some of the markets that MLS is moving into it makes sense to start building long term relationships with a new generation of fans that seem to be extremely loyal.”*
- *“With MLS expanding and also having a schedule that runs from March through October I think it's a sport that we should start to take a stronger look at”*
- *“I would love to see us get involved with women's soccer as its popularity is on the rise and **Team USA** has made it happen.”*
- *“Women's sports with a focus on soccer. What the US Women's team has been able to accomplish is something that has piqued our interest.”*
- *“US Men's and Women's Soccer - As the sport of soccer continues to grow in the United States, I believe this would allow us to hit a more diverse audience.”*

CORPORATE SURVEY RESULTS

Our sponsors on college athletics:

- *“College Athletics - Every C-Level executive has some type of affinity for the school that they attended.”*
- *“Would likely do more with the NCAA at a national level and not just sponsor some of the schools we are involved with.”*
- *“Adding college football to go along with current portfolio of sponsors. College fans are very passionate and loyal.”*

Player Endorsements

While player endorsements don't really qualify as a sport, this topic was one that generated some additional discussion, especially when it came to the future of college athletes. It wasn't too long ago that brands in this study were quick to shy away from player endorsements as the downside if a player were to be in the news for all the wrong reasons was too much of a liability. Today with star players in the NFL (Odell Beckham, Jr.) and NBA (Lebron James) having a larger social media following than the leagues they play in, player endorsements have become much more mainstream. From a risk / reward standpoint, we believe this is the start of a trend that will continue to grow for many years to come. With pending legislation in college athletics that will eventually provide student athletes the right to earn endorsement fees for the right to market their image and likeness the next couple of years will be very interesting.

Here's what we heard on endorsements:

- *“Player endorsements with athletes that line up with our brand and have a large social media presence. Endorsement with college athletes once it become legal.”*
- *“Player endorsements- Fans are getting much more engaged with players than the teams they play for. It will be very interesting to see what happens with college athletes once they have the right to market their image and likeness.”*

Other Noteworthy Sports/ Comments That Caught Our Attention

- *“esports - Passionate, untapped and growing market where you can still get in at an affordable rate.”*
- *“Lacrosse - Haven't found the right way in yet but are looking at a number of opportunities.”*
- *“English Premiere League - If you look at it from a global lens, I'd say the EPL has always caught my eye in terms of that fanaticism that's equal to the NFL.”*
- *“UFC - It's multicultural and we would be able to reach a consumer that we are not connecting with through basketball.”*
- *“WWE - The way that they integrate brands into storytelling makes their partnerships organic. They do it better than anyone I've seen in the world of sports and entertainment.”*

CORPORATE SURVEY RESULTS

9. Of the properties you work with, what specific sports property does the best job of helping you to activate your sponsorship?

Not to be confused with which sport provides you with the best bang for your buck, this question focuses more on a property or team's ability to help activate sponsorships. The price/value proposition is different than the amount of assistance sponsors are able to receive when it comes to activation.

When we asked this question in 2018, the National Football League teams led with 7 votes. Within our group of 25 sponsors (NSF Top 25) there were three (4) properties that received 4 or more votes:

2018 Activation Honor Roll

Leagues & Teams / Properties	# of Mentions
National Football League Teams	7
Sports Properties	6
Major League Baseball	5
College Sports	4
National Hockey League Teams	1
Endurance Sports	1

Congratulations going out to the twenty-five (25) teams and sports properties that made this year's National Sports Forum's Activation Honor Roll. Each of these organizations were mentioned by our sponsors when it came to this key question.

Special recognition on this year's honor roll goes out to:

- **The National Basketball Association** - For being recognized by three different sponsors.
- **Major League Baseball** - For having seven teams included on this year's honor roll, the most of any professional sports league.
- **National Football League** – For having six teams included on this year's honor roll.

(continued on next page...)

CORPORATE SURVEY RESULTS

NSF 2020 Activation Honor Roll

Category (# of Mentions)	Organization (# of Mentions)
National Football League (6)	Baltimore Ravens Cincinnati Bengals Dallas Cowboys Philadelphia Eagles San Francisco 49'ers Miami Dolphins
Major League Baseball (7)	New York Mets Oakland A's Cincinnati Reds Tampa Bay Devil Rays San Francisco Giants Boston Red Sox
National Hockey League (3)	Chicago Blackhawks Las Vegas Golden Knights St. Louis Blues
Sports Properties (8)	National Basketball Association (3x) Major League Soccer Rugby World Cup National Football League Major League Baseball Memorial Golf Tournament NCAA Men's Basketball Tournament Austrian Open
National Basketball Association (1)	Cleveland Cavaliers

CORPORATE SURVEY RESULTS

Key comments on helping to activate sponsorships:

As we reviewed all the comments for each organization, we were looking for accolades that we felt could be duplicated and passed onto sponsorship sales managers and executives throughout the industry. Listed below is a summary of our top 10 takeaways:

- **Miami Dolphins**- *“Each year they will host us for a business planning meeting with a clean slate and budget for market activation. They want to take ownership of our partnership and take pride in the work they do for us with activation.”*
- **Las Vegas Golden Knights** – *“They have taken a holistic approach to our partnerships and are always open to new ideas. In fact, they often bring new ideas our way that have helped us reshape the way we look at sponsorship with other teams.”*
- **Oakland A’s** – *“Went out of their way to really understand our business model and how we might work together. Our business is complex and not that easy to understand. By asking the right questions we could tell that they cared about this partnership.”*
- **49’ers** – *“Starts with their senior leadership and the spirit of our partnership. When we ask for something new and different it’s refreshing to see that they have a can-do approach and are willing to try new programs and promotions. They have gone out of their way to understand our business and objectives with sponsorship.”*
- **National Basketball Association** – *“They have done a really good job of building a strong cultural and lifestyle brand. It’s much more than a sport and delivers us a lifestyle that connects with our core consumer.”*
- **National Basketball Association** – *“They are constantly looking at ways that we can bring our partnership to life. Most digitally advanced of all the professional leagues that we work with.”*
- **San Francisco Giants** – *“They’re all in and take a hybrid approach of using print, television, in park activation, social media to help drive whatever the activation is for our promotions. In fairness, it all comes down to what your budget is and how they can deliver the strongest ROI for us with our investment.”*
- **St. Louis Blues**: *“They know what they are doing and are very open to new ideas. The Blues know how to bring opportunities to their sponsors that fit their budgets and are reasonable without always shooting for the moon when it comes to incremental opportunities.”*
- **The Memorial Golf Tournament** – *“They are a long-term partner that really understands our business and are extremely flexible. Our objectives and budgets have changed over the years and they always seem to come through for us. They are also a tremendous advocate for us with the PGA Tour and Players.”*
- **Cleveland Cavaliers** – *“In their post-LeBron era they have gone above and beyond and are constantly over-delivering. The can-do approach they take with our partnership is very much appreciated.”*

CORPORATE SURVEY RESULTS

Additional Analysis – If there was a common denominator on this question it really came down to one aspect **Understanding our business**. Later in this study you will see that one of our partners mentions that if they were on the sales side of the business that hiring someone with brand experience would be imperative. If you're really going to understand what companies are looking for, why not have an expert on your team that knows how to drill down when it comes to asking the right questions and coming back with real solutions?

CORPORATE SURVEY RESULTS

10. So...when you boil it all down...what are sponsors REALLY looking for in their Sponsorship Packages in 2020?

Each Corporate Survey year when we pose our questions to that year's group of twenty-five sponsors (...26 this year...), we always attack this question. Earlier in Question Six, we presented our participating sponsors with a shopping list of tangible assets and asked them if they were planning on directing MORE, the SAME, or FEWER dollars in the coming year to acquiring those assets? But here we're asking them for their guidance as to what WE should be putting into our sponsorship proposals for them? This typically includes a combination of both "hard assets" – tangible components that they're tapping into, (i.e. Tickets, Hospitality, Signage, Media Advertising, etc.), but also "soft" or "intangible" assets where the value can't necessarily be quantified, (...but are often MORE valuable to the sponsor). Examples of "soft assets" that sponsors are often really looking for can include such things as: Category Exclusivity, Unique Experiences (ex: Player introductions for their clients), and the use of your marks and logos.

So what we've done here is present our group of twenty-six with a list of twenty-two (22) of the more common hard-and-soft sponsorship assets and asked them to rank each element on a five-point scale of Most Important ... to Least Important. Here's how this year's voting broke down and how each component ranked this year versus the last two NSF Corporate Surveys:

(Scale = We're using a five-point scale for this question with "5" being EXTREMELY important ...and "1" being NOT Important at all. The sponsors were asked to rank each of the following components on this 1-to-5 scale based on those components they most see value in for their packages. Total Score is determined on the following scale: "5's" get 10 points, "4's" get 7.5 pts., "3's" get 5 pts., "2's" get 2.5 points ...and "1's" receive zero points.)

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CORPORATE SURVEY RESULTS

Rank	Element	Score	Ranked in '15 Survey	Ranked in '18 Survey	Up/Down	Biggest Climbers/Droppers
1	Category Exclusivity	223	2	T-2	+1	
T-2	Social Media	212.5	4	1	<1>	
	Facebook	T-#1		#1	-	
	Twitter	T-#1		#2	-	
	Instagram	#3		#3	-	
	Snapchat	#4		#4	-	
T-2	Use of Marks and Logos	212.5	1	T-2	-	
4	Official Product/Service Status	195	5	4	-	
5	Access to Exclusive Content	185	2	5	-	
6	Create New Distribution Channels	172.5	15	21	+15	+#1
T-7	POS/Retail	170	N/A	T-17	+10	+#2
T-7	Signage	170	11	T-7	-	
9	Community Outreach	167	10	T-15	+6	+#3
10	On-Site Activation	162.5	6	9	<1>	
11	Business to Business Opportunities	157.5	8	T-15	+4	
12	Player Involvement	152.5	21	T-17	+5	
13	Hospitality	150	11	T-12	<1>	
14	Television Advertising	147	14	10	<4>	
15	Media Advertising	140	9	T-7	<8>	<#2> (T)
16	Multicultural Programs	137.5	19	14	<2>	
17	Sweepstakes & Promotions	132.5	15	18	+1	
18	Tickets	127.5	20	11	<7>	
19	Digital (Electric) Banners & Website	127	7	T-5	<14>	<#1>
T-20	Presence on Property Website	122.5	17	T-12	<8>	<#2> (T)
T-20	Branded Destination Area	122.5	18	19	<1>	
22	Radio Advertising	77	22	21	<1>	

What we're seeing ...

This question continues to be one of our favorite ones in each year's *Corporate Survey* as the results serve as a great guide to our audience / readers as to not only what "components" to offer up in their sponsorship packages... but by doing it year-over-year, we can point out which benefits are growing in sponsor popularity, (and conversely – which benefits are dropping in sponsor favor...).

At the Top

Not a whole lot of shake up going on up at the top of the list – with the Top Five most popular components from both the 2015 or the 2018 NSF Corporate Survey staying in place. (They might go up or drop down a rung or two ~ but pretty much what sponsors are really looking for in their packages hasn't changed a whole lot in the last five years.) Which means, once again, you can't go wrong making sure that all of your proposals have components from each of the Top 5 in them when you sit down with your prospects.

CORPORATE SURVEY RESULTS

The Biggest Climbers

The biggest jumper in this year's Corporate Survey was, interestingly enough, the sponsor's desires for your assistance in helping them to **Create New Distribution Channels** – which climbed up **fifteen rungs** from #21 in the 2018 Survey ...to #6 this year. This one is obviously going to need you to ask and custom tailor your efforts to fit their particular situation. But ask. Helping your sponsors to see you as an asset in building new revenue streams goes a *long* way towards your helping them to appreciate how they can't live without you!

Again probably not unrelated was this year's #2 climber – playing a role in your sponsors POS (Point-of-Sale)//Retail efforts out in the market. This one jumped from #17 in the last survey (2018) ...to #7 this year. It may not come “natural” for your sponsors to automatically think of you when they're sitting down building their 2020-2021 marketing strategy – but you could very easily be the one element in their “black bag” that sets them world's-apart from all their competition. And even if they *don't* use you ...they're going to appreciate the fact that you're out there thinking up ways in which you can better deliver value to them.

Taking a “Hit”

Now on the flip-side ...dropping fourteen (14) spots on this year's “Valuable Assets List” is **Digital Banners and Websites**. If you've gotten this far in reading through this year's Survey ...you've no doubt noticed that we've been trumpeting the desirability of all-things-Digital – so what gives here? Right??

Well ...maybe not ALL things digital.

This asset would have been seen as far more valuable three years ago//five years ago, when sponsors were only just getting started in digital marketing. Today they're miles down the road on this and want your digital to be far more tailored to their needs and focus ...and far less “generic”. Slapping their logos onto your Digital Billboards is just not going to get it done for them. Look at this year's results – their interests in **Category Exclusivity** (#1) and **Access to Exclusive Content** (#5) is exactly what they're looking for from you with your digital efforts.

The second biggest “droppers” in this year's Survey (**Media Advertising** (from #7 ...to #15 this year), and **Presence on Property Website** (from #12 in 2018 ...to #20 this year), are not dissimilar to Digital Banners and Websites. We're now living in the age of target marketing and customization. The mantra of “one shot hits all” is definitely a thing of the past when you're looking at the “Value Meter”.

Your sponsors want to get in front of your fans ~ and your ability to deliver the personal touch, the personal experience is going to go a long way in getting you renewed.

Bottom Line

Echoing the advice we offered above -- when in doubt, you can't go wrong including the top four-to-five Sponsor Benefits in your package. There's a clear-cut grouping at the top of the “Leader Board”, and if you want the sponsors to give you *their* money ...you need to be certain to give them what *they* want – and these top components are clearly what they want!

CORPORATE SURVEY RESULTS

11. With continued technological advancements, what are you doing differently in regards to your sponsorship portfolio?

This question allows us to catch up with our sponsors to see what's working when it comes to using new technology and strategy to help secure a better ROI with their sponsor activation. As sponsorship activation budgets continue to increase brands are willing to invest and more importantly share best practices on what's working in this area.

Listed below are six key takeaways related to technology that we pulled from this year's study:

- 1) **Gamification** – *“We have been working hard to create what we like to refer to as “seat to screen” connectivity that allows us to engage with fans in a meaningful way. I met a company at the NSF several years ago called Aquimo and we are now using them extensively to develop with scoreboard promotions that do just that by connecting a fans cell phone with what's going on with video scoreboards that are now larger than life.”*
- 2) **Artificial Intelligence** – *“We are using AI to bring the fan's voice closer to sports. Connecting with people through their passions is at the heart of how we are using technology to enhance the experience for fans at the game and fans at out of the stadium watching via video.”*
- 3) **Drone Footage** – *“We are pushing the PGA Tour to take the next step with drone footage coming from their tournaments. Not there yet but something we are excited about.”*
- 4) **Machine Learning Technology** – *“Working with partners like gum gum to get better data. Data management has helped make fact-based decisions. Lean budget needs better data quality and better data management to maximize the investment.”*
- 5) **Twitch** – *“Working with the players that we endorse and letting fans play a game of NBA 2k with Paul George.”*
- 6) **Facial Recognition** - *“Working with Woldo Photos and facial recognition of our VIP's at events allows us to push photos of their guest experience by the end of the day. This also helps us amplify our presence on social media.”*

Our Analysis

The way fans consume sports is continuously changing. As these changes occur, it is critical for brands that are engaged in sponsorship to recognize the value and importance of fan engagement by evolving alongside them and using new technology. From what we have seen over the 20+ years of doing this study, the more experienced brands are always in a constant improvement process and looking for that next great tool to get the job done. Teams and properties need to embrace that same mindset if they are going to build long term and lasting relationships.

Online betting, gaming and fantasy sports has increased fans' demand for live statistics and analytics in real time. With legalized sports gambling growing at a rapid pace teams and sports properties need to embrace this movement in a manner that gets them working side by side with sponsors and new technology.

CORPORATE SURVEY RESULTS

12. What up-and-coming trends in sponsorship are you keeping your eye on for the next 2-3 years from now?

Once again many of our sponsors listed more than one trend but the three areas that stood out in this year's study were:

Top Three (3) Trends on the 2020 Watch List

Trends	%
College Athletes / Image and Likeness	20%
Legalized Sports Gambling	15%
Declining Attendance	8%

Just two years ago esports dominated this space followed closely by the future of the National Football League and augmented/virtual reality.

Top Three (3) Trends on the 2018 Watch List

Trends	%
esports	16%
Future of the NFL	12%
Augmented / Virtual Reality	12%

This past September, California became the first state in our country to pass a law that would allow college athletes to get paid for endorsement deals and hire sports agents. The NCAA's governing board recently voted unanimously to allow college athletes to be compensated, although its three divisions must still craft their own rules and detail the specifics.

On College Athlete Endorsements We Heard

- *"I'm a proponent of paying college athletes and to help these kids make good decisions with this opportunity. Not sure how we might execute in this space and know we would be cautious and a late adopter. I can see plenty of brands who are targeting young adults jumping on this train right away."*
- *"Where player endorsements with college athletes is heading. Fans are very passionate about college football and basketball and it will be interesting to see how this unfolds over time."*
- *"Endorsements with college athletes and how they will be represented. This could become the Wild West for the next 2-3 years."*
- *"We have a college marketing program, so I am going to be keeping a very close eye on endorsement opportunities with high profile college athletes."*

CORPORATE SURVEY RESULTS

On Legalized Sports Gambling We Heard

- *“Federal legislation with legalized sports gambling and how that will open up channels for us to activate on a national level.”*
- *“The continued legalization of sports gambling and how it might impact fan engagement in a positive manner. It’s only going to get bigger over the next 2-3 years.”*

On Declining Attendance, We Heard

- *“Lack of butts in seats. The home entertainment experience is getting better and better. Franchises keep raising their ticket prices higher and higher and look, people aren’t going to games like they used to.”*
- *“What’s going to happen in terms of attendance and if there’s a play on technology to help incentivize fans to get back to the ballpark. Many of the teams I’ve spoken to, their Regional TV numbers are up, ticket sales are down. That impacts our sponsorship in the types of assets we will invest in.”*

Other Noteworthy Takeaways

- **On Politics & Advertising Standards** – *“What will happen with the advertising opportunities with Facebook, Twitter and Instagram. Google just announced no micro targeting during the election year.”*
- **On esports** – *“Not sure if anyone in the health care space will get involved but I will definitely keep an eye on the developments here over the next 2-3 years”*
- **On esports** – *“Continued growth of esports and what I believe will be an eventual consolidation under one main umbrella organization or governing body.”*
- **On Nontraditional Revenues** – *“How venues will be growing their revenues with nontraditional events. For us it’s an absolute win.”*
- **On Augmented Reality** – *“Testing with augmented reality on bobbleheads. Not as easy to put all of a team’s fans in the same bucket so we are looking for ways to personalize giveaways and the ability to create our own segments out of a team’s fan base.”*
- **On Cause Related Marketing** – *“Organizations making more statements with their sponsorships rather than just slapping their names on something. Corporations have a bigger responsibility to be driven beyond traditional metrics, but also by a greater cause.”*
- **On Women’s Sports** - *We are at a tipping point for women’s sports. US domination of women’s sports is over as the professionalization in Europe is going to continue to be a gamechanger. As a product women’s sports is getting better and better and that will eventually translate into TV ratings.*

CORPORATE SURVEY RESULTS

- **On International Expansion** – *“International expansion with one of the top professional sports leagues in the United States. I feel it’s only a matter of time before this will happen and that the National Basketball League will be the first to get there.”*
- **On Fan Engagement & Product Placement** – *“I will be keeping an eye out for any new and innovative ways to increase fan engagement in a meaningful way to enhance our brand. Would also love to see teams get more creative with product placement and ways that we can organically include our product into some of the team content that is being produced.”*
- **On Diversity** – *“I think there’s more to be done in diverse segments. We believe in diversity and its one of our core values. Say Women’s golf for example, it’s a great platform, not just to advertise, but also to grow the game, and then to also grow our clients.”*

A lot can happen in two years as endorsement rights for college athletes and legalized sports gambling were not even mentioned when we asked this question back in 2018. Zion Williamson, who had \$69.4 million views on YouTube before ever playing a college basketball game at Duke could have made \$2.5 million in endorsements during his lone collegiate season (USA Today – October 2019). Other experts feel that hometown college sports stars at Power Five schools will have the ability to pocket \$25,000 a year from local businesses.

As one of our sponsors already said above regarding trends, they are keeping a close eye on this emerging category:

- *“Federal legislation with legalized sports gambling and how that will open up channels for us to activate on a national level.”*

Many industry experts are now forecasting legalized sports gambling to become one of the top sponsorship categories for a professional sports team. The New Jersey Devils projected a \$5 million a year upswing with this category according to Sports Business Journal (October 2019). If you’re looking at the category of sports gambling in sponsorships you might also want to reference U.S. Integrity President Matthew Holt’s comment “If there’s a gold rush, sell picks and shovels.” Holt, an expert in the business of legalized sports gambling projects the industry to exceed \$100 Billion by 2022.

Summary

One trend that we will be looking at over the next 2-3 years will be other emerging sponsorship categories, like cannabis. Based on our findings with this year’s study, the days of long-term agreements, automatic renewals and built-in escalators may be a way of the past with today’s sponsors.

CORPORATE SURVEY RESULTS

13. How important are the following objectives when evaluating the overall impact of a sponsorship proposal?

Another “main staple” question in every NSF “Corporate Survey” – this question provides a run-down of the most important outcomes that sponsors tell us they seek out in considering a sponsorship package.

As we do with a number of our other questions in the survey, we presented each of the following sixteen (16) components to all of our ‘20 Corporate Sponsors/Advertisers and asked that they rank each ingredient on a five-point scale (Scale = With “5” being EXTREMELY important ...and “1” being NOT Important at all.) That gave us our **Score** number that you see below. From there – we put together a chart that ranks all of the options – comparing them to the same results coming out of the 2015 and 2018 Corporate Surveys.

Rank	Element	‘20 Score	Ranked in ‘15 Survey	Ranked in ‘18 Survey	Up/Down	Biggest Climbers/Droppers
1	Directs Traffic	236	1	4	+3	+#1 (T)
2	Directs Sales	222.5	2	2	-	
3	Tap into new markets and new customers	217.5	3	T-6	+3	+#1 (T)
4	Has the flexibility to fit within my budget	215	3	5	+1	
5	Helps retain my customer base	202.5	7	3	<2>	
6	Create a common bond between your fans and my consumers	200	8	1	<5>	<#1>
7	Having ownable assets/elements to promote/activate around	192.5	5	T-6	<1>	
8	Scale - mass, broad appeal	189	6	T-8	-	
9	Ability for turn-key execution by the team/event	160	9	10	+1	
10	Having a team program that ties into my marketing theme	155	13	T-12	<2>	
11	Hospitality opportunities	153	11	T-12	+1	
12	Social networking opportunities	150	10	T-8	<4>	<#2>
13	Chance to become a trademark association within the community	142.5	11	11	<2>	
14	Ties into our current ad campaign	140	15	15	+1	
15	Grassroots marketing	120	14	14	<1>	
16	Opportunity to distribute product samples	70	16	16	-	

CORPORATE SURVEY RESULTS

What we're seeing ...

Little bit of movement in the upper rungs on this year's ROI question. Nothing overly dramatic (...like climbing 14-rungs), but a little bit of jockeying for #1 priority with our sponsors. **Help us to Drive Traffic** reclaims the top spot on the NEEDS-list in the '20 survey, but close behind, (...and both very "bottom line"-driven), are **Direct Sales** and **Tap into New Markets and Customers**.

So, ask yourself if you've successfully addressed all three of these key "hot-buttons" in your program. The key is you've got to be able to clearly show how your property can tangibly drive sales. If you haven't successfully done that -- take your proposed package back into the shop for a re-tooling. You'll be glad you did!

Budget Flexibility...?? For years, "**Has the Flexibility to Fit within My Budget**" has always been either the number-one or number-two criteria when it came to evaluating the likelihood of your sponsorship package getting picked up. In these last couple of Surveys, it's dropped a shade, but it's always right up there in the criteria-evaluation phase.

Sponsors are telling us that they'll always find money for good ideas, but more than likely, that "good idea" is going to be one that enables them to hit their top two objectives: *Help us Drive Business (Traffic)* and *Help us Tap into New Markets and Customers*. If you can demonstrate how your package will accomplish one (...or better yet...BOTH...) of those objectives, your success-factor will grow tremendously.

In the final analysis – just remember, the more you're able to do for your sponsors, the more they'll reward you with their participation ...and their dollars.

CORPORATE SURVEY RESULTS

14. Assign a letter grade to your organization's ability to successfully activate sponsorships in sports.

This is the fifth time we have asked our corporate sponsors to provide a grade for their ability to successfully activate their sponsorships. This year's cumulative GPA came out at a 3.06 and slightly higher than the 3.0 that was recorded in the previous study. Listed below is a breakdown on how our sponsors scored themselves.

Sponsor Activation Report Card - 3.06

% of Sponsors	Letter Grade
5%	A
13%	A-
23%	B+
3%	B
23%	B-
5%	C

While this is a subjective grading system, we have always found the comments associated with the letter grade to provide value. Listed below are a handful of comments that best summarize our sponsor's collective feedback with this question.

Comments Supporting A's and A- Scores

- *"We have been able to keep our internal team together and over time have become better at activating sponsorships. It didn't happen overnight, but I am happy where we are right now."*
- *"We have improved our activation at point of sale, and we will be scaling up in this area."*
- *"We have gone down a path that has made us part of the cultural narrative with all of our sponsorships. Our partners understand our objectives and are happy to be associated with our brand."*

CORPORATE SURVEY RESULTS

Comments Supporting B+, B and B- Scores

- *“Market conditions change so quickly that one year something can work and the next year it might not.”*
- *“We have many sponsorships and as a result don’t always have the time or dedicated staff to activate our smaller deals as well as some of our larger partnerships.”*
- *“If something isn’t working, we need to be able to change that. These short-term deals give us the flexibility to change the asset mix with the club.”*

Comments Supporting C Scores

- *“There is more that we can do to help people understand the relationship between our brand and their sports team. We learn a lot every year and know there is plenty of room for improvement.”*

Quick Analysis

Experience and size of staff continues to be the primary difference in separating the A’s from the C’s. Sponsors have different objectives and realize that their ability to measure KPI’s will only continue to improve over time as technology, analytics and strategy improve.

CORPORATE SURVEY RESULTS

15. Assign an overall letter grade to the industry's ability to successfully activate your sponsorships in sports. Why?

This is also the fifth time we have asked our corporate sponsors to provide a grade for the industry's ability to successfully help activate their sponsorships. This year's cumulative GPA came out at a 2.50, a significant drop from 2018 when a record high 3.06 was recorded.

Listed below is a breakdown on how our sponsors scored the industry:

Industry Activation Report Card - 2.50

% of Sponsors	Letter Grade
0%	A
15%	A-
5%	B+
10%	B
27%	B-
10%	C+
15%	C
18%	C-

While this is a subjective grading system, we have always found to value with some of the comments associated with the letter grade awarded. Listed below are a handful of comments that best summarize our sponsors collective response to this question.

Comments Supporting A+, A, and A- Scores

- *"We are fortunate to work with some great teams and properties. They know what we want and continue to work hard to meet our needs and objectives."*
- *"We have great partners who make a real effort to understand our ever-evolving business."*

CORPORATE SURVEY RESULTS

Comments Supporting B+, B and B- Scores

- *“The industry doesn’t really understand our business until we have been engaged for a number of years. The learning process could be sped up.”*
- *“Properties are starting to increase compensation for their sponsorship activation/service teams and as a result the turnover is lower than it used to be. With that comes better assistance with our activations.”*
- *“Effort has improved over the years, but many teams are still not staffed enough to take their assistance in activation to an A level.”*

Comments Supporting C+, C and C- Scores

- *“Has to do with listening to what brands want and not trying to force a one size fits all into sponsorships.”*
- *“Industry lacks imagination and I am seeing too much arrogance with certain professional teams.”*
- *Across the board you can tell some teams are great collaborators and forward thinking. Others consider us just a number. They say, “Here are assets and move on. “*

Quick Analysis

Understanding a sponsor’s business, listening and creativity was the primary difference in separating the A’s from the C’s in this year’s study. Sponsors have different objectives and levels of expectations when it comes to the amount of assistance they should or do receive from the teams and properties they work with. From all the data we looked at it became clear that the higher the expectation the lower the grade awarded. Sponsors who graded the industry higher a had lower expectation when it came to the amount of assistance they were seeking from the teams and properties they worked with.

CORPORATE SURVEY RESULTS

16. What could teams & sports properties be doing with their social/digital media to make it more conducive to your sponsorship objective?

This was a new question in our study and one that was added based on what we have learned over the years. Sponsors seek to be a part of a team's social and digital media because they know that's how fans are consuming sports today. Sports fans are already present on a team's social media channels, making sponsorship one of the best ways to extend a brand's reach and awareness to a larger, focused audience. The challenge for teams, over commercialization. How much of a team's content are they willing to make available to sponsors?

Our sponsors provided some great insight on this question. Listed below are seven of our key takeaways for your review:

1. **Team Up with Your Players** - *“Create more unique and ownable content for major sponsors in an authentic manner. This is much easier to do via endorsements with high profile athletes or personalities. If teams could work closer with their players, I could see some real improvement in this area.”*
2. **Less is More** - *“Limit the number of partners that they let into this space and work with them to make the content meaningful. If teams would do this, they could charge a real premium here Less is more!”*
3. **Working Together** - *“Co-creating content that delivers on the brands objectives as opposed to just showing up with the generic play of the game that any sponsor could slap their name on. Today 95% of what's presented to me is “Here's what we are doing, and do you want to be a part of it? We have one partner that takes a much different approach recently asked us - What can we do together with our combined social and digital media to create a win/win situation.”*
4. **Organic Content** - *“Hold true to their objectives in this space and at the same time continue to develop more organic content that allows brand to become part of the story in seamless manner.”*
5. **Amplification** - *“We have had success by creating our own content and simply asking our partners to help us amplify our reach.”*
6. **Community** - *“Value based marketing important to collaborating with sponsors to activate. Community is growing in importance's. Sponsors don't want to pay players to endorse community-based initiatives.”*
7. **Out of Season** - *“More engagement out of season. Fans follow their favorite sports teams in the off season, and we need to connect with them 12 months a year.”*

CORPORATE SURVEY RESULTS

Quick Analysis

Once a partnership is established teams are now being asked to produce results by creating engaging content over their social media channels for their sponsors. Problem is that all sponsors are clamoring for the content and there isn't enough to go around. A less is more approach will drive higher values for this content if the programming is managed properly. Teams should know their fans well enough to develop personal relationships with several different audiences (season ticket holders, partial plan holders, suite holders, college students, senior citizens etc.). Since not all sponsors are targeting all these groups, teams can tailor content and create a win/win scenario. Partnering ups with players helps expand the reach and content. Today's athletes have become social media influencers and can engage with a team's fan base in an organic manner. Allowing your sponsors to reach their target audiences through players has become much easier today and can be produced inhouse.

One other way that teams bring value to sponsor in this area is through **amplification**. Your team serves as an advocate for your sponsors and essentially becomes an influencer.

Promoted posts, sponsored Tweets and video ads now offer opportunities for your team promote content and increase visibility for your sponsors. If this is the case ... Why not add an activation budget that would allow you to purchase these promoted posts on behalf of your sponsors?

CORPORATE SURVEY RESULTS

17. Knowing what you know about buying sponsorships, what would you do differently if you were on the sales side?

This question continues to be our favorite question in the study and was designed to help individuals who sell sponsorships for a living. The goal is always to provide key insights from some of the most respected sponsorship executives in North America.

As we went through all the comments collected, they ended up fitting into ten themes outlined.

1. Brand Experience

- *“If I were the CRO for a sports property I would make sure someone on my team had solid brand experience working in the areas of strategy, sponsorship, activation and measurement. We have found organizations that have these types of individuals on board end up doing the best job for us. They know how to drill down and get a true understanding of our business needs.”*

2. Teamwork

- *“There is no I in TEAM. Think of our sponsorship as a WE. What can we do together to make the most out of our sponsorships? It’s not always about the revenue. Teams need to realize that we can help them in many ways, especially ticket sales. Bring your marketing and ticket sales staffs into our conversations. Don’t work in a silo “*
- *“Sit down with a partner or prospective partner and ask one simple questions - What are we going to do together? Set mutual goals that are centered around the work that we can and should be doing together.*

3. Don’t Be Greedy

- *“There’s an expectation for an escalator every year. Even increasing 5% per year is a lot of money. You need to justify that additional incremental spend. Are you going to be doing more digital for me? Making more investment in the on-site experience? More airtime? This theme, **maintaining a client first partnership approach** as opposed to a hardline commitment should be considered. Delivering value in a clear way.”*

4. Integrated Approach – What Else

- *“I would bring the full weight of an integrated opportunity to my prospects by understanding what else What else could we be doing together in the areas of technology, marketing and brand integration”. I would bring my CMO and CTO to the meeting.”*

5. Customization & Consultative Selling

- *“Sales reps don’t take time to think about what can be done. Please listen to me to understand our objectives and goals. Show us that you have put thought into it.”*

CORPORATE SURVEY RESULTS

- *“I would place a much greater emphasis and value on the assets that a brand can use to meet its objectives. One size doesn't fit all when selling sponsorships. I would make a concentrated effort to customize my proposals instead of trying to push spots and dots.”*
- *“I would make a real effort to secure 30 minutes with every prospective partner and simply ask probing questions that would allow me to better understand their business. If a partner has some interest, I believe they will make this time available. If they wouldn't I would realize it's time to move on.*

6. Getting Out of Your Comfort Zone & Facilities

- *“I would look much more closely at digital recognition and how I could help sponsors reach our fans outside of my arena or stadium. I would develop engaging promotions that would help my partners reach and connect to this audience.”*

7. Customer Service

- *“Activation and ownership of accounts. One stop service. I would try and eliminate the mentality of sell, sell, sell vs. caring and stewarding of my sponsors. The long-term ROI here would justify the change in culture.”*

8. Referrals

- *I would get my best sponsors to talk to prospective clients on my behalf to get the door open. We have done this for some of the teams we sponsor and guess what It works!”*

9. Doing Homework

- *Always start with a deep understanding of a prospective sponsors' business. There is plenty of public information out there (annual report, quarterly earnings, articles in the business trades) and I would create a culture where my sales team would be well educated before walking into an initial meeting. You can't go in with a “**know it all attitude**” but a deep understanding puts you in position to ask some great questions.*
- *“If you don't know my business, I won't take the meeting. Know what I've done and how you can help us drive our business. I would tell my story in a manner that showcases how we could deliver results, but only after I knew what our mutual objectives were.”*

10. Don't Sell Based on Price

- *Use sponsorship to help me grow and market my brand vs. selling on price, assets and transactions. I just came from Consumer Electronic Show Las Vegas and all I heard about was the products that companies were showcasing. They were not selling based on price but rather the opportunity to work together on mutually beneficial business objectives.*

CORPORATE SURVEY RESULTS

Analysis

Listening is one of the most important skills you can have. How well you listen has a major impact on your job effectiveness, relationships with others and ability to sell sponsorships. After we reviewed the insights provide by our sponsors with this question, we took a step back and asked What's the key message here? It all boils down to what Stephen Covey said about active listening in his bestselling 10 Habits of Highly Successful People.

Habit #5

“If I were to summarize in one sentence the single most important principle I have learned in the field of interpersonal relations, it would be this: Seek first to understand, then to be understood.”

-DR. STEPHEN R. COVEY

Covey has also been quoted countless times saying, “Most people do not listen with the intent to understand; they listen with the intent to reply.” The way to improve your listening skills is to practice “active listening.” This is where you make a conscious effort to hear not only the words that another person is saying but, more importantly, the complete message being communicated.

2020
Sports Executives Survey

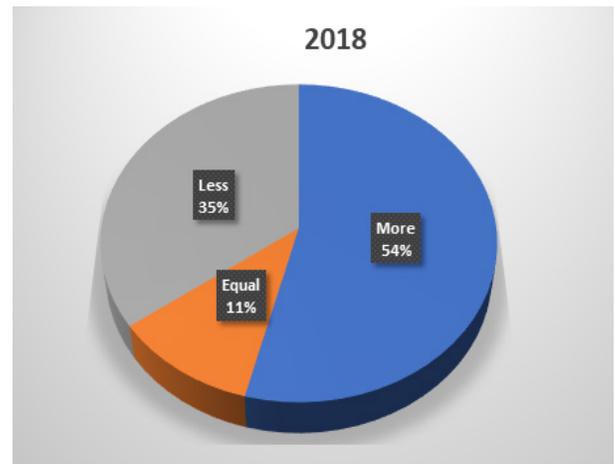
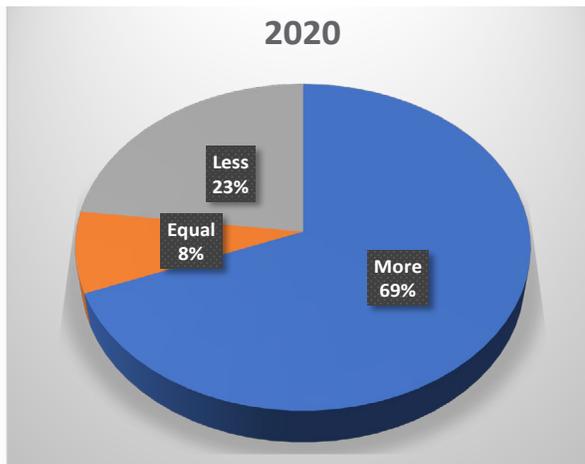
Results

SPORTS EXECUTIVES SURVEY RESULTS

1. In the upcoming year, do you expect sponsors' spending on sports advertising and sponsorships to increase, decrease, or remain the same and why?

When asked where they expect to see corporate budgets allocated to sports advertising and sponsorship spending over the next two years going...

- **69%** - Responded they plan on spending **more** in 2020
- **8%** - Responded they plan on spending an **equal amount** in 2020
- **23%** - Responded they plan on spending **less** in 2020



2. In your opinion, how do sponsors measure success or failure of their sponsorship investment?

Answer	Response
ROI measures/Sales	27%
Observation or Opinion	23%
Awareness or "Buzz"	23%
ROO Measures	12%
Research Studies	8%
They Don't	7%
*Other, Please Specify	0%

*Other:

- Social Media Buzz

• "They struggle with how to measure. Analytics are certainly helpful but ultimately, I think they buy more on emotion, relationship...and budget."

SPORTS EXECUTIVES SURVEY RESULTS

3. To what medium do you think your sponsors will be directing their sports dollars for 2018? Do you believe they will be increasing, keeping steady, or decreasing their spending on each medium named below?

'20 Rank	Medium	Increase Spending	Keeping Steady	Decreasing Spending	Total Score	Rank in '18 Survey
1	Social Media Overall	17	2	0	91	1
	<i>Instagram</i>	15	4		92	
	<i>Facebook</i>	7	10	2	67	
	<i>Twitter</i>	6	12	1	67	
	<i>LinkedIn</i>	6	10	3	63	
2	Mobile (e.g.; Augmented Reality, QR Codes)	13	6	0	83	2
3	Digital Media Overall	11	7	1	77	3
	<i>Email</i>	5	9	5	57	
	<i>Webisodes/ Webinars</i>	5	8	6	55	
	<i>Websites</i>	3	9	6	48	
	<i>Banners/Pop-Ups/Screensavers</i>	1	5	13	33	
4	On-Site Sponsorship (e.g.; gameday promotions, fan fest activity)	9	8	2	71	5
5	In-Stadium/Arena (e.g.; Pre/In-game video, closed circuit television feed, Signage, Charging stations, iBeacons)	7	12	0	71	4
6	Hospitality (e.g.; suites)	6	13	0	69	6
7	Alternative Media (e.g.; Pizza box tops, apparel)	4	14	1	63	7
8	Television	4	13	2	61	8
9	Out-Of-Home (e.g.; Billboards, Bus stops/shelter)	4	12	3	59	11
10	Tickets (e.g.; Season Ticket Packages)	4	12	3	59	9
11	Sales Collateral (e.g.; Ticket stock/ packaging, Poster, Brochure, Self-mailer)	0	9	10	37	10
12	Radio	0	7	12	33	12
13	Print (e.g.; Newspaper ads, Magazine ads, Program ads)	0	5	14	29	13

SPORTS EXECUTIVES SURVEY RESULTS

4. What are the greatest threats to traditional sports sponsorships?

'20 Rank	Threat	Real Threat	Somewhat of a Threat	Not a Threat	Rank in '18 Survey
1	Lack of Activation	17	5	1	1
2	Low Quality Activation	15	5	2	2
3	Sponsor Clutter/ Sponsorship Soup	12	9	2	8
4	Lack of Measurement	11	11	1	3
5	Poor Servicing	11	6	5	7
6	Poor Evaluation	10	9	3	5
7	Sponsorship of other properties (<i>arts, music, etc.</i>)	9	5	8	6
8	Too Expensive	8	11	4	4
9	Player Endorsements Outside of Team Sponsorships	7	10	5	9
10	Down Economy	5	11	7	11
11	Ambush Marketing	4	6	11	12
12	Poor Team Performance	3	16	3	10

*Other:

Real Threat – Cost and ease of connecting with fans digitally without rights fees

SPORTS EXECUTIVES SURVEY RESULTS

5. In your opinion, how do you think sponsors would rate each of the sponsorship/advertising package elements.

We presented our Industry executives with nineteen (19) of the more common sponsorship components generally incorporated into a typical team/event sponsorship package. We then asked them to rank each element as “Extremely Important”, “Important”, or “Not Important” based on what they think their SPONSORS most want to see in their packages today. Here’s how the voting broke down:

'20 Rank	Element	Extremely Important	Important	Not Important	Total Score	Rank in '18 Survey
1	Social Media	15	2	0	81	2
	<i>Instagram</i>	16	1	0	83	
	<i>Facebook</i>	8	8	1	65	
	<i>Twitter</i>	6	9	2	59	
	<i>Snapchat</i>	2	8	7	41	
T-1	<i>Use of Marks and Logos</i>	15	2	0	81	1
3	Community Outreach	13	4	0	77	T-11
4	Category Exclusivity	12	5	0	75	4
T-5	On-Site Activation	11	6	0	73	T-6
T-5	Official Product/ Service Status	11	6	0	73	T-11
T-7	Multicultural Programs (e.g.; <i>Hispanic Marketing Programs</i>)	10	7	0	71	17
T-7	Access to Exclusive Content	10	7	0	71	5
T-7	<i>Business to Business Opportunities</i>	10	7	0	71	3
10	<i>Create New Distribution Channels</i>	9	7	1	67	10
T-11	<i>Player Involvement</i>	8	7	2	63	18
T-11	Media Advertising	6	11	0	63	8
	<i>Television Advertising</i>	7	9	1	63	
	<i>Digital (Electric Banners & Websites)</i>	6	8	3	57	
	<i>Radio Advertising</i>	0	10	7	37	
13	POS/ Retail	6	9	2	59	9
14	Hospitality (e.g.; <i>Suites</i>)	3	14	0	57	T-14
T-15	Sweepstakes/ Promotions	3	13	1	55	T-6
T-15	Branded Destination Area	2	15	0	55	13
16	Tickets (e.g.; <i>Season Ticket Packages</i>)	1	14	2	49	16
17	Signage	1	13	3	45	T-14
18	Presence on Property Website	1	9	7	39	19

SPORTS EXECUTIVES SURVEY RESULTS

6. Let's talk ROI. How do you think sponsors would rate each of the following objectives when evaluating the overall impact of a sponsorship proposal?

Extremely Important; Important and Not Important.

Total Score is determined on a scale in which EI's get 5 points, I's get 3, and NI's get 0 points.

	Objectives	Extremely Important	Important	Not Important	Total Score	Rank in '18 Survey
1	Directs Sales	16	1	0	85	1
2	Helps Tap into New Markets & Consumers	13	4	0	77	4
T-3	Drives Traffic	11	6	0	73	2
T-3	Ownable Assets/Elements to Promote Around	12	4	1	73	8
T-3	Helps Retain Customer Base	11	6	0	73	3
6	Creates a Common Bond Between Fans & Consumers	10	7	0	71	7
7	Has Turn-Key Execution by their Team	9	7	1	67	T-12
T-8	Has Flexibility to Fit Within Budget	8	8	1	65	5
T-8	Scale	7	10	0	65	12
10	Provides Social Networking Opportunities	7	8	1	60	6
11	Chance to Become a Trademark Association Within the Community	3	13	1	55	T-10
12	Ties Sports Programs to Marketing Theme	3	12	2	53	T-12
T-12	Opportunity to Distribute Product Samples	3	11	3	51	15
14	Ties into Current Ad Campaign	2	12	3	49	14
T-15	Grassroots Marketing	3	9	5	47	16
T-15	Opportunities for Hospitality	1	13	3	47	T-10

SPORTS EXECUTIVES SURVEY RESULTS

7. What do you think sponsors believe is the most significant sponsorship/ advertising trend over the past year?

Trend	2020	2018
Social Media (<i>Networking, Social Gaming</i>)	18%	35%
Accountability/Measurement (<i>ROI,ROO, etc.</i>)	23%	30%
Digital Marketing	6%	10%
Mobile Marketing	0%	10%
Digital/Streaming	12%	5%
Multicultural Marketing	6%	5%
Cause Marketing	18%	5%
Radio	0%	0%
Television	0%	0%
esports	12%	0%
Sustainability	5%	N/A

SPORTS EXECUTIVES SURVEY RESULTS

8. In your opinion, outside of your sport, which sport gives corporations the “BEST BANG” for their buck?

We asked the respondents to critique themselves – voicing their opinion as to which sports do the best job of returning value to their corporate sponsors.

Sport	2020	2018
NFL	37%	5%
NBA	21%	20%
MiLB	11%	0%
College	11%	20%
NHL	5%	5%
MLS	5%	10%
MLB	5%	5%
Golf	5%	10%
UFC	0%	5%
Motorsports	0%	5%
Action Sports	0%	0%
Olympics	0%	0%
NASCAR	0%	10%



*Other

- “The number of games in MLB have a ton of impact. So, to me the answer here is MLB. College is cost effective, NASCAR still reaches many. Olympics are tough to beat on an international basis, but they don’t seem to really deliver ROI, NFL seems to be over priced for what they really do...”

SPORTS EXECUTIVES SURVEY RESULTS

9. Assign a letter grade to your organizations ability to successfully activate sponsorships in sports.

This is the fourth time we have posed this question in the *NSF Corporate & Industry Survey* – and mirrors the question we asked of your sponsors (where it comes to critiquing how good a job they feel that YOU do in activating their sponsorships). Here’s how you ranked yourselves:

Response	Answer
12%	A
41%	A-
23%	B+
18%	B
6%	C+

10. Assign a letter grade to the corporation’s ability to successfully activate their sponsorships in sports.

Response	Answer
6%	A
6%	A-
29%	B+
29%	B
6%	B-
18%	C+
6%	C

SPORTS EXECUTIVES SURVEY RESULTS

11. What's the "One Thing" you wish you could tell the corporation(s) that sponsor you?

Before we get into sharing some of the "sound bites" we received in response to this question we just wanted to take this opportunity to thank you. Thank you for your time – and thank you for your candor in answering not just this... but every question we ran by you.

Here are some of the "snippets" we took away from your answer to this year's final Sponsorship question:

- *"We can provide a turnkey solution for them"*
- *"Invest emotionally in the experience - be part of the story."*
- *"be honest with what is working, take advantage of assets and challenge us on additional opportunities."*
- *"You need to activate your assets as much as possible through your channels as well. Build in budgets to activate and plans to use your tools too.."*
- *"We want full integration and collaboration - this is a partnership, not a sponsorship - it needs to go both ways."*
- *"We are a media company too. Emphasis on Partnership, not Sponsorship."*
- *"Trust us."*
- *"Retain significant dollars to activate your partnership."*
- *"Need to understand the importance of activation beyond just benefits in contract."*
- *"Let's work together. If something is wrong, let's try another solution."*
- *"It's not about what you like, it's about what your target likes (I do tell them that)"*
- *"Don't stop asking for more. Push us past uncomfortable. Make us earn the renewal."*
- *"Be open and honest with us. Don't look at the relationship as a constant negotiation. Trust in us, and you will derive more value from the sponsorship."*
- *"Be authentic"*

2020
Career Satisfaction

Results

CAREER SATISFACTION RESULTS

1. When asked about overall satisfaction in their current positions vs. three years ago....

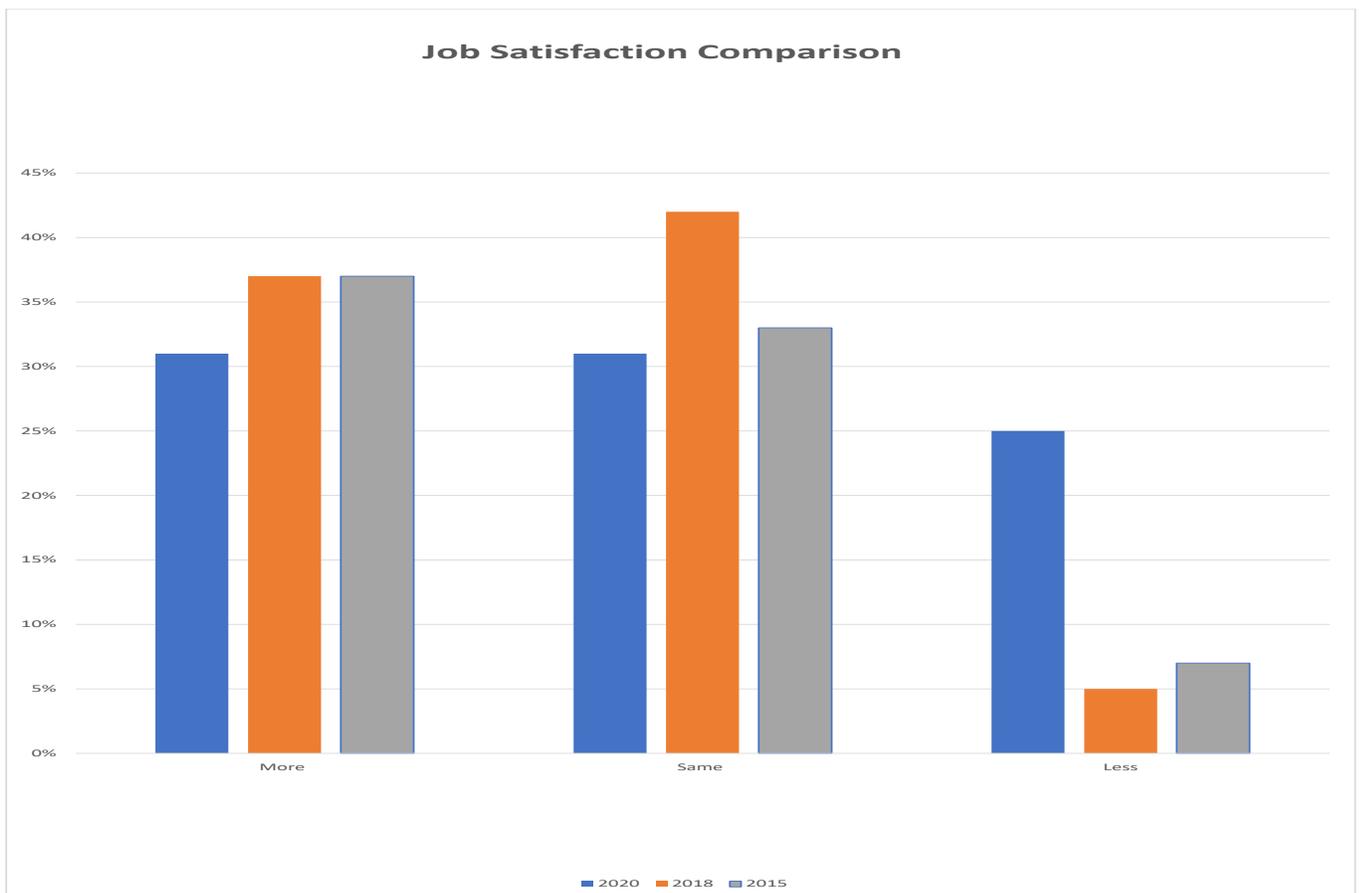
31% - Responded they were **much more satisfied** With their job today

31% - Responded they were **somewhat more satisfied** with their job today

13% - Indicated they felt the **same level of satisfaction** as three years ago

25% - Said they were **less or much less satisfied** with their job today

Job Satisfaction	2020	2018	2015
Much More Satisfied	31%	37%	37%
Somewhat More Satisfied	31%	42%	33%
Same level of satisfaction	13%	5%	22%
Less satisfied	25%	5%	7%
Much less satisfied	0%	0%	2%



CAREER SATISFACTION RESULTS

2. When asked how often they feel that they are free to make creative/innovative decisions regarding sponsorships...

This is a question we added to the Career Satisfaction portion of the Industry Survey several years ago and we continue to bring it back. We felt that it followed along the same vein as our questions about Career Satisfaction and Advancement Opportunities in the business. (Given that a lot of times, creative freedom will impact an executive's career satisfaction and ultimate longevity).

19% - Responded they **always** have creative freedom

31% - Said that **most of the time** they have creative freedom

50% - Felt that they **sometimes** have creative freedom

0% - Responded that they **rarely** have creative freedom

0% - Indicated that they **never** have creative freedom

Ability to Have Creative Freedom	2020	2018	2015
Always	19%	39%	28%
Most of the Time	31%	39%	57%
Sometimes	50%	6%	17%
Rarely	0%	17%	7%
Never	0%	0%	0%

CAREER SATISFACTION RESULTS

3. When asked if they felt if there was sufficient opportunity to advance within their own organization...

38% - Responded **yes there was sufficient opportunity** to advance within their own organization

62% - Responded **no there was not sufficient opportunity** to advance within their own organization

Opportunity for Advancement	2020	2018	2015
Yes, more opportunity	38%	72%	48%
No, less opportunity	62%	28%	52%

CAREER SATISFACTION RESULTS

4. And finally... when we asked our executive respondents if they expected to be with the same organization in the next three years...

69% - Responded they **expect to be** with the same organization three years from now

31% - Said they **do not expect** to be with the same organization in three years

Expect to be with Same Organization in Three Years	2020	2018	2015
Yes	69%	72%	65%
No	31%	28%	35%

NOTES