



April 3, 2014

PERSPECTIVES on SPORTS MARKETING ROI

Presented for:



Presented by: Jon Last, President

**SPORTS&
LEISURE**
RESEARCH GROUP

In A Society Where Time Depravity Is the Ultimate Concern, Sports Engages

- “Want to reads vs have to reads”
- Sports fans as influential—5:1 vs the general population
- Aggregated SLRG measured impact on brand lift and perceptual alignment historically increases 2-3 X from pre-to-post measurement
- The sports fan mindset – Fans prime themselves for the experience



Media Proliferation: More is More

MEDIA'S NEW INFLECTION POINT:

“ *With the proliferation of new media—those most engaged see new media as additive rather than as replacements for traditional, trusted sources.* ”

— November 12th, 2013

MediaPost's
MARKETING*sports*

*In fact, it appears to have **FUELED** the consumption level of sports fans.*



It's About Leveraging a Trusted Heritage and Inserting the Brand into a Valued Community

"Sports consumers are highly involved consumers with a desire for long-term association with a team sport" (Shani, 1997)

"Relationships that are internalized and based on shared values have the deepest level of influence and are most durable and consistent" (Bee and Kahle, 2006)



But... How Do You Know It's Working?

"We know that 50% of all advertiser expenditures are wasted...the problem is we don't know which 50%"

John Wanamaker

In Today's Cluttered Media Environment Is It *Really* Possible To Gauge The Impact Of A *Single* Advertising Execution On Consumers' Brand Perceptions And Behavior?



- Consumers don't think like Media Planners
- The purchase process is too multi-tiered and brand preferences diffuse across a dynamic multi-touch point environment

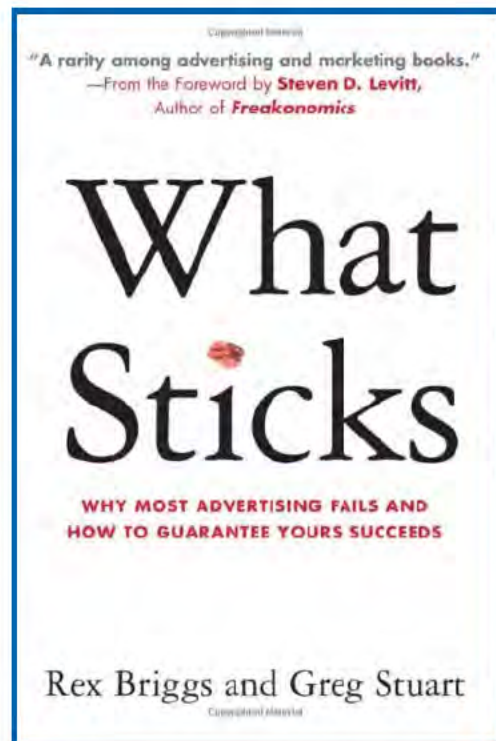
MESSAGE OVERLOAD & INTRUSION



STOP THE MADNESS

“There are many ‘traditional/old school’ researchers that think you can go to large highly compensated professional respondents, ask *leading* and *direct* questions and get quality insights on marketing effectiveness.”

“Consumers’ Brains Are Not Wired That Way!”



This specific ad or sponsorship Made Me:

- Visit a retailer
- Recommend a Product or Service
- Consider Purchasing Product or Service
- Purchase Product or Service

Leading questions create leading results and parity...

“No One Wants to Call the Baby Ugly!”



An SLRG Approach Towards Measuring Sports Marketing Impact

Measuring Efficacy, Not just eyeballs for Sponsor Partners



- Customized Pre/Post Tests with “Exposed” and “Control” samples moves the evaluation beyond “scorekeeping to communications optimization.
- Measure program resonance, awareness, recall, and association in a contextual “brand blind” environment for honest, actionable and brand building insights.
- Conduct “Gap Analysis” to assess impact opportunities across multiple target markets and program elements...Helps you to derive audience based solutions

An SLRG Approach Towards Measuring Sports Marketing Impact

Derive Insights on the Impact of Your Campaign



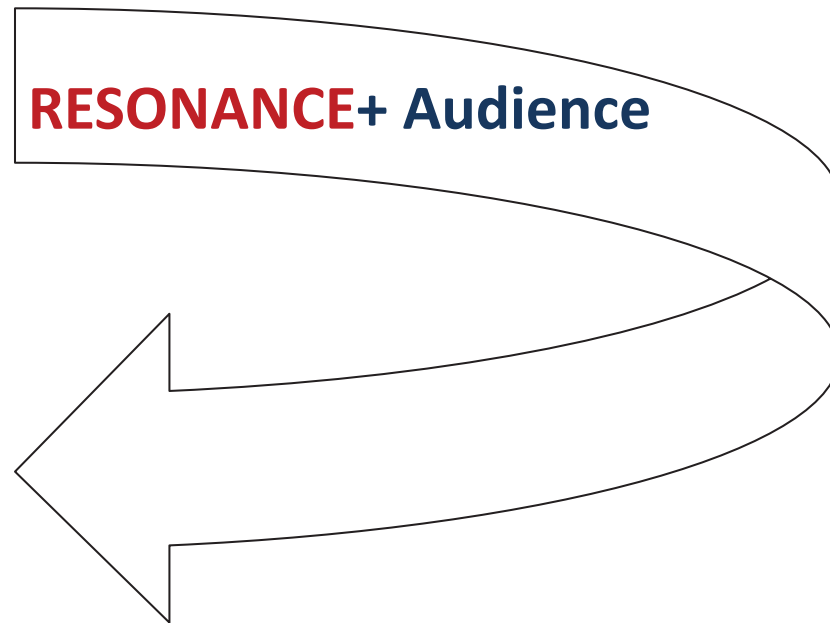
- Pre-Post Tracking Studies with fans and attendees open a window to a target's perceptual movement and ascertain the Impact of sponsorship activation
- Measure the effectiveness of a campaign to create proper associations with a brand's desired position
- Measure relative perception vs. competitive brands
- Gauge impact across multiple dynamics:
 - Exposed vs. Un-Exposed
 - Exposed over accumulation time horizons

An SLRG Approach Towards Measuring Sports Marketing Impact

Sponsor ROO= **RESONANCE+** Audience

KEY MEASUREMENT CRITERIA

- Recall and Awareness
- Likeability/ Positive Association/Favorability
- Purchase Intent/Category Engagement



An SLRG Approach Towards Measuring Sports Marketing Impact

Sample Summary Measurement Results

Brand
"X"

- **Likeability/Positive Association/Favorability**
 - Sponsoring brand association with custom brand essence trigger #1 moves from 28% to 37% (from 3rd to 2nd in the competitive set)
 - Sponsorship brand Likeability statement #2 moves from 34% to 43% (from #2 to #1 in the set)
- **Purchase Intent**
 - Purchase likelihood moves from 13% to 25% (One of only two brands with positive post test vs pre test movement)
- **Recall/Awareness**
 - 52% recall/awareness vs 14% for the second highest competitor
 - 26% most impactful presence association is more than twice that of any competitor

An SLRG Approach Towards Measuring Sports Marketing Impact

Key Research Measures

Areas of Inquiry:

- **Brand Awareness Module**
 - Sponsor brand and Competitive Set
- **Aided and Unaided Recall Module**
 - Category Sponsorship in General
 - Specific activation elements
- **Main Message Association Module**
 - Attribution of key brand messaging to appropriate competitive set brand – derived from the creative brief/brand objectives
- **Brand Perception Metrics Measurement Module**
 - Association of specific test brands with a variety of desired performance and brand essence characteristics
 - Evaluations and Hierarchical Rankings of competitive set on fit, likeability, quality, value, performance benefits
- **Brand Fit Module–Full Competitive Set**
 - By Sponsorship Property
 - With Specific Event Property
- **Brand Experience and Intended Use Module**
 - Category Utilization
 - Prior and Future Trial/ Purchase Interest
- **Demographics / Respondent Profile Module**
 - Key Demographics
 - Audience/ Attendance History and engagement Intensity

An SLRG Approach Towards Measuring Sports Marketing Impact

Positive Brand Association Shows Post Survey Lift for Brand X

- Brand X shows positive perceptual growth across virtually all metrics—and with greater intensity than its competitive set!
- Brand X sees significant widening of leadership gap as competitor sees demonstrative fall-off against many dynamics
- Lift is particularly significant across the following dynamics:

	Pre Survey Total		Post Survey Total	
Has bold flavor	43.6%	↑	49.7%	Biggest jump in the competitive set; broadens gap from #1 to #2
Is a smart way to snack	37.5%	↑	39.6%	Tops in the competitive set; and the only brand with positive movement
Has intense taste	38.4%	↑	45.9%	Tops in the competitive set and the only brand with positive movement
Is more than a snack	28.3%	↑	37.6%	Only brand with positive pre-to-post movement, climbing from third to second in set
From the quality leader	48.6%	↑	53.6%	Significant leadership growth to more than half of all respondents

NO MORE COOKIE CUTTERS!

A FRESH, CUSTOMIZED and More Relevant Approach is Needed:



Experimental Design—to allow gap analysis between control and Exposed Populations



Tracking Study to measure evolving perceptions and brand associations in a “blind” environment over time.



Creation and Deployment of category and competitive set specific norms that have relevance within the experimental frame work



Measurement of consumer “playback” of actual brand triggers/ desired messaging spawned from the creative brief and stated brand objectives

THANK YOU!

**SPORTS&
LEISURE**
RESEARCH GROUP

Jon Last
President

445 Hamilton Avenue, Suite 1102
White Plains, NY 10601

work/fax 914.358.3558/3557
cell 917.714.3548

jlast@sportsandleisureresearch.com