

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"While the overall sponsorship spend in Ireland is only around a tenth of the amount spent on conventional advertising, it is nonetheless an established, resilient and growing sector with promising prospects for the years ahead. It has weathered the difficult years of the recent economic downturn, and looks set now for a period of sustained, if unremarkable, growth."

- Brian O'Connor, Senior Consumer Analyst

This report looks at the following areas:

- · With TV-related sponsorship, ensure property/target market match
- · Consumers want to see the payback from sponsorship
- · Never mind the glamour, consumers favour local sponsorships

Having endured a challenging period of stagnation during the recent economic downturn, the Irish sponsorship market has returned to growth. This is primarily due to the strong revival of the NI economy and, in particular, the RoI economy over the past couple of years. It is also due to a small number of high-profile sporting events that attracted significant sponsorship – most notably the Rugby World Cup in October 2015.

Sporting events, teams and individuals attract the bulk of sponsorship spend in Ireland, which is not surprising given the fact that consumers are significantly more likely to regard sports-related sponsorship to be more effective than, for example, a TV content-related sponsorship. Sponsorship spend in the future depends not only on continued economic growth, but also on the appeal of future sporting events, which often depends on whether or not Irish teams and/or athletes are involved.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Issues covered in this report

Executive Summary

The market

Sponsorship spend to total almost €142 million in 2015

Figure 1: Estimated sponsorship expenditure, IoI, RoI and NI, RoI, 2010-20

Forecast

Figure 2: Index of estimated sponsorship expenditure, RoI & NI, 2010-20

Market factor

Both Irish economies are recording strong(ish) growth

Confidence among Irish consumers relatively buoyant

Recovery beginning to benefit consumers' financial health

Spending on advertising on the increase in Ireland

Sale of broadcasting rights could impact sponsorships' effectiveness

The consumer

Sport, movies and reality TV the most popular types of TV sponsorship

Figure 3: How effective consumers rate sponsorship of TV programmes, NI and RoI, September 2015

Sports teams or stadia sponsorships regarded to be most effective

Figure 4: How effective consumers rate sponsorship of sports events, teams and awards, NI and RoI, September 2015

Charity-related sponsorships deemed most effective by consumers

Figure 5: How effective consumers rate sponsorship of other events and organisations, NI and RoI, September 2015

Consumers setting the bar high for what's required of sponsors

Figure 6: Agreement with statements relating to sponsorship and sponsors, NI and RoI, September 2015

What it means

Issues and Insights

With TV-related sponsorship, ensure property/target market match

The facts

The implications

Consumers want to see the payback from sponsorship

The facts

The implications

Never mind the glamour, consumers favour local sponsorships

The facts

The implications

The Market - What You Need to Know



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Economic situation on the up across Ireland

Spending on advertising on the increase in Ireland

Sale of broadcasting rights could impact sponsorships' effectiveness

Market Size and Forecast

Sponsorship market in Ireland back to growth after downturn

Figure 7: Estimated sponsorship expenditure, IoI, RoI and NI, RoI, 2010-20

Stronger growth ahead for RoI market, but NI market to fare well

Figure 8: Index of estimated sponsorship expenditure, RoI & NI, 2010-20

Market Drivers

RoI economic recovery firmly underway, NI less assured

Figure 9: Economic growth, actual and projected, NI, RoI & UK, 2013-16

Consumers in RoI beginning to feel effects of economic recovery

Figure 10: Financial health of Irish consumers, RoI, October 2014-September 2015

NI consumers still in a better position overall

Figure 11: Financial health of Irish consumers, NI, October 2014-September 2015

Consumer confidence in NI at highest level since 2008

RoI consumer confidence hits 10-year high in November 2015

Overall advertising spend to €1.1 billion in Ireland in 2015

Figure 12: Total advertising expenditure, IoI, RoI and NI, 2010-15

Sale of broadcasting rights can reduce a sponsorship's effectiveness

Social media key to activating consumer engagement

Figure 13: Social network used by consumers at least once a week, NI and RoI, March 2015

Worldwide sponsorship spend at all-time high in 2015

Figure 14: Global sponsorship spend, € billion, 2007-15

 $\ensuremath{\mathsf{NI}}$ golfer McIlroy riding high on sponsorship earnings table

Figure 15: Individual athletes with highest endorsement/sponsorship earnings, € million, 2015

Key Sponsorship Examples

Overview

Carling new sponsor of Dave

Mountain Dew takes fans snowboarding via virtual reality

Electric Ireland to sponsor Team Ireland in Rio

BP sponsorship of Indigenous Australia sparks controversy

Fashion in an age of technology

YouTube Gaming Update facilitates sponsorship

The Consumer – What You Need to Know

Sport, movies and reality TV the most popular types of TV sponsorship

Sports teams or stadia sponsorships regarded to be most effective

Charity-related sponsorships deemed most effective by consumers

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Consumers want sponsors to 'give back'

The Consumer – Effectiveness of TV Sponsorship

Sport, movies, reality TV and soap operas deemed most effective

Figure 16: How effective consumers rate sponsorship of TV programmes, NI and RoI, September 2015

Men aged 25-44 most likely to regard sports programme sponsorship as very effective

Figure 17: Consumers who rate sponsorship of sport programmes (eg premiership football) to be 'very effective', by gender, age and social class, NI and RoI, September 2015

Consumers aged 16-24 most inclined to highly rate sponsorship of movies on TV

Figure 18: Consumers who rate sponsorship of movies on TV to be 'very effective', by gender, age and social class, NI and RoI, September 2015

Comedies, drama and soap operas seem a good bet to younger consumers

Serious, factual programmes most likely deemed 'not at all effective'

Figure 19: Consumers who regard various forms of sponsorship of TV programmes as 'Not At All Effective', NI and RoI, September 2015

The Consumer – Effectiveness of Sports-related Sponsorship

Sponsoring sports teams or stadia deemed most effective

Figure 20: How effective consumers rate sponsorship of Sports Events, Teams and Awards, NI and RoI, September 2015

Sports teams and tournaments most likely deemed 'very effective'

Sponsoring an individual may be best route to reaching women

Figure 21: Agreement that sponsorship of an Individual athlete/Sports personality is 'very effective', NI and RoI, September 2015

Live sports events sponsorship recognised by NI consumers aged 25-34

Figure 22: Agreement that sponsorship of a live sports event is 'very effective', NI and RoI, September 2015

Only minority dismiss sports-related sponsorships as 'not at all effective'

Figure 23: Consumers who regard various forms of sports-related sponsorship to be 'not at all effective', NI and RoI, September 2015

The Consumer – Effectiveness of Other Types of Sponsorship

Sponsorships of charitable events and charities deemed most effective

Figure 24: How effective consumers rate sponsorship of other events and organisations, NI and RoI, September 2015

Sponsorship of musical events most likely be deemed 'very effective'

Figure 25: Consumers who regard various forms of other sponsorship to be 'very effective', NI and RoI, September 2015

Sponsorship of music festivals/events makes most sense to 16-24s

Figure 26: Agreement that sponsorship of music festivals or events is 'very effective', NI and RoI, September 2015

Sponsorship of charity organisations has broader appeal among RoI consumers

Figure 27: Agreement that sponsorship of charity organisations (eg red cross, cancer research, Trocaire) is 'very effective', NI and RoI, September 2015

Women and 16-24s most convinced by charitable events sponsorships

Figure 28: Agreement that sponsorship of charitable events (eg fundraisers, fun runs etc) is 'very effective', NI and RoI, September 2015

More scepticism than enthusiasm for most sponsorships

Figure 29: Consumers who regard various forms of other sponsorship to be 'not at all effective', NI and RoI, September 2015

Older consumers and ABC1s most inclined to doubt radio show sponsorship

Figure 30: Agreement that sponsorship of radio shows is 'not at all effective', NI and RoI, September 2015

Award ceremonies also fail to appeal to mature and ABC1 consumers

Figure 31: Agreement that sponsorship of award ceremonies is `not at all effective', NI and RoI, September 2015



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Scant enthusiasm among ABC1s for sponsorships of business events

Figure 32: Agreement that sponsorship of business events is 'not at all effective', NI and RoI, September 2015

The Consumer – Attitudes towards Sponsorship

Consumers want sponsors to contribute and have standards

Figure 33: Agreement with statements relating to sponsorship and sponsors, NI and RoI, September 2015

Consumers aged 45+ want sponsors to give something back

Figure 34: Agreement with statement 'sponsorships are only worthwhile if they give something back to the sport/community', by age and social class, NI and RoI, September 2015

Sponsorships most effective at influencing consumers when local

Figure 35: Agreement with statements relating to the impact of sponsorship on consumer behaviour, NI and RoI, September 2015

Sponsorships with local slant have near-universal appeal

Figure 36: Agreement with statement, 'I would be more likely to use brands that sponsor local charities/teams/events', by gender, age and social class, NI and RoI, October 2015

Older consumers most inclined to deny sponsorships' influence

Figure 37: Agreement with statement, 'I don't pay much attention to who sponsors the programmes I watch or teams I follow', by gender, age and social class, NI and RoI, October 2015

Men and younger consumers most likely drawn to sponsors of favourite causes

Figure 38: Agreement with statement, 'I would be more likely to use brands that sponsor my favourite players/teams/events', by gender, age and social class, NI and RoI, October 2015

General sense that sponsorship has a positive impact

Figure 39: Agreement with statements relating to the practical impact of sponsorship, NI and RoI, September 2015

Broad recognition that sponsorships improve organisations' resources

Figure 40: Agreement with statement, 'sponsorships improve the quality of organisations' resources (eg helps fund better equipment)', by gender, age and social class, NI and RoI, October 2015

Men and ABC1s most concerned about sponsors having undue influence

Figure 41: Agreement with statement, 'I worry that sponsors might have too much say in the running of teams/organisations', by gender, age and social class, NI and RoI, October 2015

Men more convinced than women of performance-related benefits

Figure 42: Agreement with statement, 'sponsorship improves the quality of sports teams/personal performance', by gender, age and social class, NI and RoI, October 2015

Consumers want high ethical standards and restrictions on sponsors

Figure 43: Agreement with statements relating to standards and restrictions on sponsorship, NI and RoI, September 2015

Older consumers and ABC1s most inclined to want ethical standards adhered to

Figure 44: Agreement with statement, 'sponsors should take more action when the organisations/teams they sponsor act unethically', by gender, age and social class, NI and RoI, October 2015

Younger consumers and C2DEFs object less to alcohol brand sponsorships

Figure 45: Agreement with statement, 'alcohol brands should not be able to sponsor sports teams/certain events/programmes', by gender, age and social class, NI and RoI, October 2015

Appendix - Data Sources, Abbreviations and Supporting Information

Consumer research

Data sources

Market size rationale

Abbreviations

Appendix - The Consumer

NI Toluna tables

Sponsorship of TV programmes

Figure 46: How effective consumers rate sponsorship of news/current affairs programmes, by demographics, NI, September 2015

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 47: How effective consumers rate sponsorship of comedies/sitcoms (eg Big Bang Theory) programmes, by demographics, NI, September 2015

Figure 48: How effective consumers rate sponsorship of movies on TV, by demographics, NI, September 2015

Figure 49: How effective consumers rate sponsorship of drama (eg Breaking Bad, CSI) programmes, by demographics, NI, September 2015
Figure 50: How effective consumers rate sponsorship of soap operas (eg Emmerdale, Fair City), by demographics, NI, September 2015

Figure 51: How effective consumers rate sponsorship of sport (eg Premiership football) programmes, by demographics, NI, September 2015

Figure 52: How effective consumers rate sponsorship of documentaries/history programmes, by demographics, NI, September 2015

Figure 53: How effective consumers rate sponsorship of home/leisure (eg cooking shows, Location, Location, Location) programmes, by demographics, NI, September 2015

Figure 54: How effective consumers rate sponsorship of reality TV (The X Factor, Big Brother) programmes, by demographics, NI, September 2015 Figure 55: How effective consumers rate sponsorship of quiz shows (eg Countdown), by demographics, NI, September 2015

Figure 56: How effective consumers rate sponsorship of daytime (eg Jeremy Kyle Show, Loose Women) programmes, by demographics, NI, September 2015

Sponsorship of events, teams and awards

Figure 57: How effective consumers rate sponsorship of live sports events, by demographics, NI, September 2015

Figure 58: How effective consumers rate sponsorship of sports teams, by demographics, NI, September 2015

Figure 59: How effective consumers rate sponsorship of stadiums/arenas/venues, by demographics, NI, September 2015

Figure 60: How effective consumers rate sponsorship of individual athletes/sports personalities, by demographics, NI, September 2015

Figure 61: How effective consumers rate sponsorship of sports tournaments, by demographics, NI, September 2015

Figure 62: How effective consumers rate sponsorship of sports leagues, by demographics, NI, September 2015

Figure 63: How effective consumers rate sponsorship of sports awards, by demographics, NI, September 2015

Figure 64: How effective consumers rate sponsorship of sports magazines, by demographics, NI, September 2015

Sponsorship of other events/organisations

Figure 65: How effective consumers rate sponsorship of radio shows, by demographics, NI, September 2015

Figure 66: How effective consumers rate sponsorship of music festivals or events, by demographics, NI, September 2015

Figure 67: How effective consumers rate sponsorship of charitable events (eg fundraisers, fun runs, etc), by demographics, NI, September 2015

Figure 68: How effective consumers rate sponsorship of charity organisations (eg Red Cross, Cancer Research, Trocaire), by demographics, NI, September 2015

Figure 69: How effective consumers rate sponsorship of business events, by demographics, NI, September 2015

Figure 70: How effective consumers rate sponsorship of award ceremonies, by demographics, NI, September 2015

Figure 71: How effective consumers rate sponsorship of non-music festivals or events, by demographics, NI, September 2015

Figure 72: How effective consumers rate sponsorship of non-charity organisations (eg orchestra), by demographics, NI, September 2015

Agreement with statements relating to advertising

Figure 73: Agreement with the statement 'I don't pay much attention to who sponsors the programmes I watch or teams I follow', by demographics, NI, September 2015

Figure 74: Agreement with the statement 'I think multiple sponsors of the same event/programme can be confusing', by demographics, NI, September 2015
Figure 75: Agreement with the statement 'Sponsorships are only worthwhile if they give something back to the sport/community', by

demographics, NI, September 2015

Figure 76: Agreement with the statement 'The type of brand that sponsors my favourite teams/players matters to me', by demographics, NI, September 2015

Figure 77: Agreement with the statement 'Sponsorships improve the quality of organisations' resources (eg helps to fund better equipment)', by demographics, NI, September 2015

igure 78: Agreement with the statement `Sponsorship improves the quality of sports teams/personal performance', by demographics, NI, September 2015

Figure 79: Agreement with the statement 'I'm more likely to use brands that sponsor my favourite teams/players/events', by demographics, NI, September 2015

Figure 80: Agreement with the statement 'Sponsors should take more action when the organisations/teams they sponsor act unethically', by demographics, NI, September 2015
Figure 81: Agreement with the statement 'I worry that sponsors might have too much say in the running of teams/organisations', by

demographics, NI, September 2015

Figure 82: Agreement with the statement 'I would be more likely to use brands that sponsor local charities/teams/events', by demographics, NI, September 2015





Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 83: Agreement with the statement 'Alcohol brands should not be able to sponsor sports teams/certain events/programmes', by demographics, NI, September 2015

Figure 84: Agreement with the statement 'I think there should be more restrictions on the type of brands/products (eg chocolate) that can sponsor children's programming/events', by demographics, NI, September 2015

RoI Toluna tables

Sponsorship of TV programmes

Figure 85: How effective consumers rate sponsorship of news/current affairs programmes, by demographics, RoI, September 2015

Figure 86: How effective consumers rate sponsorship of comedies/sitcoms (eg Big Bang Theory) programmes, by demographics, RoI,

September 2015 Figure 87: How effective consumers rate sponsorship of movies on TV, by demographics, RoI, September 2015

Figure 88: How effective consumers rate sponsorship of drama (eg Breaking Bad, CSI) programmes, by demographics, RoI, September 2015

Figure 89: How effective consumers rate sponsorship of soap operas (eg Emmerdale, Fair City), by demographics, RoI, September 2015
Figure 90: How effective consumers rate sponsorship of sport (eg Premiership football) programmes, by demographics, RoI,

September 2015

Figure 91: How effective consumers rate sponsorship of documentaries/history programmes, by demographics, RoI, September 2015

Figure 92: How effective consumers rate sponsorship of home/leisure (eg cooking shows, Location, Location, Location) programmes, by demographics, RoI, September 2015
Figure 93: How effective consumers rate sponsorship of reality TV (The X Factor, Big Brother) programmes, by demographics, RoI,

September 2015

Figure 94: How effective consumers rate sponsorship of quiz show (eg Countdown), by demographics, RoI, September 2015

Figure 95: How effective consumers rate sponsorship of daytime (eg Jeremy Kyle Show, Loose Women) programmes, by demographics, RoI, September 2015

Sponsorship of events, teams and awards

Figure 96: How effective consumers rate sponsorship of live sports events, by demographics, RoI, September 2015

Figure 97: How effective consumers rate sponsorship of sports teams, by demographics, RoI, September 2015

Figure 98: How effective consumers rate sponsorship of stadiums/arenas/venues, by demographics, RoI, September 2015

Figure 99: How effective consumers rate sponsorship of individual athletes/sports personalities, by demographics, RoI, September

Figure 100: How effective consumers rate sponsorship of sports tournaments, by demographics, RoI, September 2015

Figure 101: How effective consumers rate sponsorship of sports leagues, by demographics, RoI, September 2015

Figure 102: How effective consumers rate sponsorship of sports awards, by demographics, RoI, September 2015

Figure 103: How effective consumers rate sponsorship of sports magazines, by demographics, RoI, September 2015

Sponsorship of other events/organisations

Figure 104: How effective consumers rate sponsorship of radio shows, by demographics, RoI, September 2015

Figure 105: How effective consumers rate sponsorship of music festivals or events, by demographics, RoI, September 2015

Figure 106: How effective consumers rate sponsorship of charitable events (eg fundraisers, fun runs, etc), by demographics, RoI,

September 2015
Figure 107: How effective consumers rate sponsorship of charity organisations (eg Red Cross, Cancer Research, Trocaire), by demographics, RoI, September 2015

Figure 108: How effective consumers rate sponsorship of business events, by demographics, RoI, September 2015

Figure 109: How effective consumers rate sponsorship of award ceremonies, by demographics, RoI, September 2015

Figure 110: How effective consumers rate sponsorship of non-music festivals or events, by demographics, RoI, September 2015

Figure 111: How effective consumers rate sponsorship of non-charity organisations (eg orchestra), by demographics, RoI, September

Agreement with statements relating to advertising

Figure 112: Agreement with the statement 'I don't pay much attention to who sponsors the programmes I watch or teams I follow', by

demographics, RoI, September 2015
Figure 113: Agreement with the statement 'I think multiple sponsors of the same event/programme can be confusing', by demographics, RoI, September 2015

Figure 114: Agreement with the statement 'Sponsorships are only worthwhile if they give something back to the sport/community', by demographics, RoI, September 2015

Figure 115: Agreement with the statement 'The type of brand that sponsors my favourite teams/players matters to me', by demographics, RoI, September 2015

Figure 116: Agreement with the statement 'Sponsorships improve the quality of organisations' resources (eg helps to fund better equipment)', by demographics, RoI, September 2015



Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 117: Agreement with the statement 'Sponsorship improves the quality of sports teams/personal performance', by demographics, RoI, September 2015

Figure 118: Agreement with the statement 'I'm more likely to use brands that sponsor my favourite teams/players/events', by demographics, RoI, September 2015

Figure 119: Agreement with the statement 'Sponsors should take more action when the organisations/teams they sponsor act unethically', by demographics, RoI, September 2015
Figure 120: Agreement with the statement 'I worry that sponsors might have too much say in the running of teams/organisations', by

demographics, RoI, September 2015
Figure 121: Agreement with the statement 'I would be more likely to use brands that sponsor local charities/teams/events', by demographics, RoI, September 2015

Figure 122: Agreement with the statement 'Alcohol brands should not be able to sponsor sports teams/certain events/programmes', by demographics, RoI, September 2015
Figure 123: Agreement with the statement 'I think there should be more restrictions on the type of brands/products (eg chocolate) that can sponsor children's programming/events', by demographics, RoI, September 2015