

Sports Marketing and Sponsorship - UK - June 2011

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What is this report about?

Sport continues to dominate the UK sponsorship market in both value and volume terms and has weathered the worst of the recession thanks to continuing inflows of new sponsors attracted by its ability to speak to large, engaged audiences in an otherwise fragmented marketing landscape, and to the injection of funding and raising of profile provided by London's hosting of the 2012 Olympic Games, as well as some high profile deals in football.

This report assesses the shape in which the sector has emerged from the recession and the ways in which it is attempting to reconcile the need of brands for more inventive (and expensive) uses of their assets with the resource limitations that exist on both sides of the sponsorship fence. In so doing, it tests the hypothesis that:

What have we found out?

- New deals in football in 2010 were worth more than nine times those in the next most valuable sport, rugby union.
- The value of new deals struck by the banking sector in particular has collapsed since 2009, while non-Olympic interest appears increasingly focused on lower-level deals.
- Sponsors are displaying a preference for category/partner deals and athlete endorsements ahead of the title sponsorships that have traditionally provided the highest (and most valued) levels of exposure and brand awareness.
- Approval levels of Olympic sponsorships more than a year ahead of the London Games suggest major event sponsorships can still deliver value for the high fees they continue to command. However, geographical variations suggest the 2012 Olympics risk being perceived as 'a London thing' by consumers beyond the capital.
- Brand awareness and media exposure are still the most common deliverables of any sponsorship, with many sponsors moving into sport as a response to media fragmentation.
- The most sought-after add-on to awareness and exposure is favourability – using the visibility of the sponsorship to create associations with the property that change consumers' attitudes towards it and impact on their purchasing decisions as a result.

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