ESA SPONSORSHIP FACT SHEET[1] – 2013

Definition of Sponsorship: (source: *ICC Code of Advertising and Marketing Communication Practice (incorporating the ICC International Code on Sponsorship*):

Any commercial agreement by which a sponsor, for the mutual benefit of the sponsor and sponsored party, contractually provides financing or other support in order to establish an association between the sponsor's image, brands or products and a sponsorship property in return for rights to promote this association and/or for the granting of certain agreed direct or indirect benefits.

EUROPEAN SPONSORSHIP DATA

(Source: *European Sponsorship Association (ESA)*)

	Total Sponsorship		
	2010	**2011**	**2012**
Total	**€23.3b**	**€26.5b**	**€25.9b**
% Change Year on Year		+14%	-2.2%

<u>2012 ESA figures</u>

November 2013: The European Sponsorship Association (ESA) announced that the annual figure for the size of the European sponsorship industry in 2012 is €25.9b, a small drop of 2.2% on the 2011 total of €26.5b.

The Association reported that 2012 was a year of mixed sponsorship stories across Europe. While the UK benefited from hosting the London 2012 Olympic and Paralympic Games - revenues which stimulated general growth in home-grown sponsorships - many markets saw very little movement in revenue and others saw a decline, including Spain and some Eastern European markets.

Some Western European countries, such as France, Spain, Italy and Greece experienced quite steep declines and the boost from the 2012 European Championships and other sponsorship activity in Eastern Europe was not quite enough to balance it out.

ESA doesn't see the decline as a new trend but more as a one-off glitch as both France and Spain are again showing growth.

The small decline mirrors that of the advertising industry which saw a 2.7% drop in spend across Western Europe in 2012, compared with 2011 (source: ZenithOptimedia).

The sponsorship market in Europe continues to benefit from other global platforms including Formula 1, as well as having the advantage that many International sporting federations are based in Europe.

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[1] *This document is intended as a guide to the market only. The data provided has been obtained from multiple sources, as quoted. Methodologies for each set of data vary and accordingly, it is not always possible to compare different sets of data. Readers are advised to refer to the original source for further information.*

Looking ahead, the Association forecasts that 2013 is likely to see a decline in revenues for the UK as the London 2012 local deals are concluded but that increased revenue will be seen in the market with the Winter Olympics Games in Sochi in 2014. This growth is already beginning to take effect.

ESA's figures cover all forms of sponsorship, excluding activation, for sports and non-sports across the 50 European Countries.

The ratio of sport to non-sport sponsorships is 70:30.

<u>2011 ESA figures:</u>

November 2012: The European Sponsorship Association (ESA) announced an increase in its annual figures for the size of the European sponsorship industry. Much of the upturn reflects the Olympic Summer Games hosted in London and the European Championships held in Poland and the Ukraine with sponsorship monies entering the economy in the build-up to these events.

ESA's figure for the value of the 2011 European sponsorship market is €26.5 billion - a 14% increase on 2010's total of €23.3 billion.

The uplift year on year was not across all markets with understandable downturns reported in Greece for example. Other markets remained static as the economic conditions prevail. However, Europe has benefited from being host to major European and Global events with figures expected to remain buoyant for 2012 as the full effect of hosting London 2012 and the UEFA European Football Championship is seen and with Sochi due to host the Olympic Winter Games in 2014.

ESA's figures cover all forms of sponsorship, excluding activation, for sports and non-sports across the 50 European Countries. The ratio of sport to non-sport sponsorships is 67:33 a growing trend to non-sport activities as brands take a wider view of sponsorship.

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GLOBAL SPONSORSHIP DATA

Global Sponsorship Values[2]: (source: *IEG*)
For more information visit the IEG website www.sponsorship.com

	Global	North America	Europe	Asia Pacific	Central & Southern America	Other
2013 projected	$53.3b (+4.2%)	$19.9b (+5.5%)	$14.5b (+2.8%)	$12.6b (+5%)	$4.0b (+2.6%)	$2.3b (+4.5%)
2012	$51.1b	$18.9b	$14.1b	$12.0b	$3.9b	$2.2b
2011	$48.7b	$18.2b	$13.5b	$11.2b	$3.7b	$2.1b
2010	$46b	$17.1b	$12.9b	$10.6b	$3.6b	$2b
2009	$44.4b	$16.5b	$12.1b	$10.1b	$3.5b	$1.9b
2008	$43.4b	$16.6b	$11.7b	$9.5b	$3.5b	$2b
2007	$37.7b	$14.9b	$10.6b	$7.4b	$3.0b	$1.8b
2006	$33.7b	$13.4b	$9.5b	$6.4b	$2.7b	$1.7b
2005	$30.5b	$12.1 b	$8.5b	$5.8b	$2.5b	$1.6b
2004	$27.9b	$11.1 b	$7.8b	$5.2b	$2.3b	$1.5b
2003	$25.9b	$10.25b	$7.4b	$4.7b	$2.2b	$1.4b
2002	$24.4b	$9.6b	$7.1b	$4.7b	$2.1b	$1.3b
2001	$23.5b					

The USA-based research group, bases its data on wholesale rather than retail values and do not include broadcast sponsorship or sponsorship-in-kind values (IEG classifies "broadcast sponsorship" as media advertising, not sponsorship), hence the difference in values for Europe and overall calculations.

Global Sponsorship Rights Structure: (source*: TWSM[3], published by REPUCOM.)* For more information, visit www.theworldsponsorshipmonitor.com

	Sponsorship Sectors – by committed investment (%)				
	Sports	Arts & Culture	Broadcast	Other[4]	Naming Rights[5]
2012	91%	2%	2%	1%	4%
2011	84%	0.5%	1%	1%	14%
2010	87%	1%	3%	1%	8%
2009	89%	1%	1%	1%	8%
2008	88%	2%	2%	1%	7%
2007	85%	2%	2%	11%	
2006	78%	1%	2%	19%	
2005	91%	1%	1%	7%	
2004	85%	1%	3%	10%	
2003	81%	3%	4%	13%	

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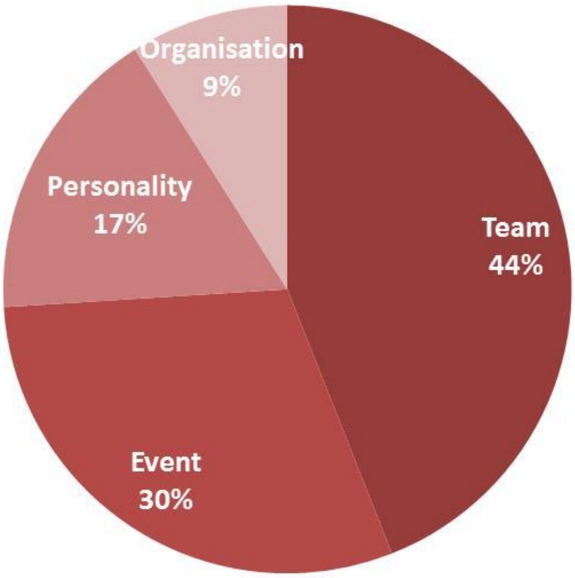
[2] *Figures are based on rights values.*
[3] *Figures for TWSM are based on deals announced in that year and cover only those for $75k or more that are announced in the media. They do not include TV Rights.*
[4] *'Other' category includes Environment, Community, CSR (and Naming Rights up to 2007). Note these are likely to be underestimated due to their lower rights fees and less coverage in the media.*
[5] *Until 2008, Naming Rights were included within 'Other'.*

Deals by Type 2012 (number of deals): (source*: TWSM*[6]*, published by REPUCOM.)* For more information, visit www.theworldsponsorshipmonitor.com



Industry Categories (number of deals): (source*: TWSM*[7]*, published by REPUCOM.)* For more information, visit www.theworldsponsorshipmonitor.com

	2007	2008	2009	2010	2011	2012	2012 (Value)
Cars/Auto	125	156	145	194	210	190	$1,437m
Clothing – Sports	68	100	186	136	152	163	$1,710m
Banking	129	123	98	138	144	120	$1,055m
Insurance	36	49	65	60	71	81	$290m
Telecoms	53	80	99	108	96	80	$603m
Drinks – Beer	76	83	68	98	84	74	$473m
Airlines	46	64	73	78	71	64	$853m

[6] *Figures for TWSM are based on deals announced in that year and cover only those for $75k or more that are announced in the media. They do not include TV Rights.*
[7] *Figures for TWSM are based on deals announced in that year and cover only those for $75k or more that are announced in the media. They do not include TV Rights.*

Sports (number of deals): (source*: TWSM*[8]*, published by REPUCOM.)* For more information, visit www.theworldsponsorshipmonitor.com

	2011	2012
Soccer	403	436
Golf	123	131
Rugby Union	123	85
Venues	97	84
Motorsport – NASCAR	75	73
Basketball	65	80
Tennis		78
American Football	68	66
Olympics	66	66
Cycling	n/a	64

Deals by Value (source*: TWSM*[9]*, published by REPUCOM.)* For more information, visit www.theworldsponsorshipmonitor.com

	2011	2012	% change
$75-149k	**235**	**183**	**-22%**
$150-500k	**459**	**460**	**+0.2%**
$500-999k	**370**	**321**	**-13%**
$1m-2.499m	**336**	**365**	**+9%**
$2.5m-4.99m	**187**	**201**	**+8%**
$5-9.99m	**145**	**174**	**+20%**
$10m+	**214**	**209**	**-2%**
Total Deals	**1,946**	**1,916**	**-1.5%**

[8] *Figures for TWSM are based on deals announced in that year and cover only those for $75k or more that are announced in the media. They do not include TV Rights.*
[9] *Figures for TWSM are based on deals announced in that year and cover only those for $75k or more that are announced in the media. They do not include TV Rights.*

NATIONAL and REGIONAL SPONSORSHIP DATA

European Markets*

	2009	2010	2011	2012	Source
Denmark	€0.110b	€0.120	€0.120b	€0.145b	Dansk Oplagskontrol – Sport Only
France		€1.4b			Sporsora – all sponsorship
Finland		€0.17b	€0.17b (€0.1b)	€0.17b (€0.1b)	Sponsor Insight – all sponsorship – (sport only in brackets)
Germany			€4.20b		FASPO – all sponsorship
Ireland	€0.133b	€0.130b	€0.120b	€0.122b	Onside Sponsorship – Sport Only
Italy	€1.608b	€1.454b (€0.884b)	€1.40b (€0.856b)	€1.288b (€0.782b)	StageUp – all sponsorship (sport only in brackets)
Norway	€0.41b (€0.29b)	€0.44b (€0.32b)	€0.53 (€0.34b)	€0.50b (€0.36b)	Sponsor Insight – all sponsorship (sport in brackets)
Sweden		€0.53b (€0.3b)	€0.69b (€0.35b)	€0.70b (€0.51b)	Swedish Sponsorship & Events Association – all sponsorships (sport only in brackets)

*Estimates from key associations and agencies.

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North American Sponsorship Market (source: *IEG*)

North American Sponsorship Spending By Property Type

NORTH AMERICAN SPONSORSHIP SPENDING BY PROPERTY TYPE	2011 SPENDING	2012 SPENDING	INCREASE FROM 2011	2013 SPENDING (PROJECTED	INCREASE FROM 2012 (PROJECTED)
SPORTS	$12.38 billion	$13.01 billion	5.1%	$13.79 billion	6%
ENTERTAINMENT	$1.85 billion	$1.93 billion	4.3%	$2.03 billion	5.1%
CAUSES	$1.68 billion	$1.70 billion	1.2%	$1.78 billion	4.8%
ARTS	$869 million	$891 million	2.5%	$920 million	3.3%
FESTIVALS, FAIRS AND ANNUAL EVENTS	$804 million	$825 million	2.6%	$849 million	2.9%
ASSOCIATIONS AND MEMBERSHIP ORGANIZATIONS	$532 million	$550 million	3.4%	$572 million	4%

Annual Growth Of Advertising, Sales Promotion And Sponsorship