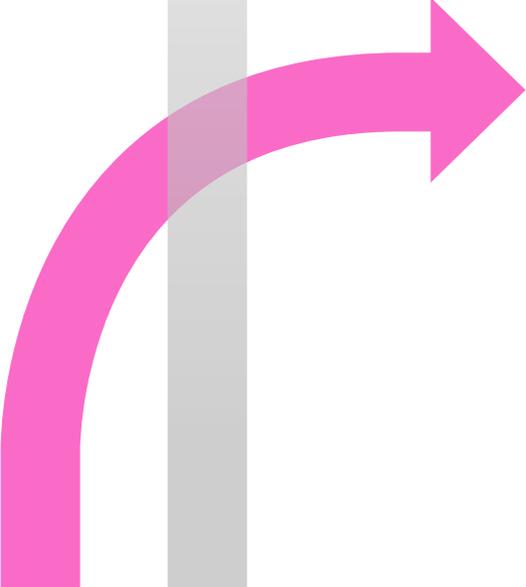




# Sponsorship: In pursuit of greatness





## KEY FINDINGS

- Sponsorship can provide bigger gains for smaller brands
- Brand & programme synergy is crucial in TV sponsorship
- Football tournaments have more commercial potential for brands than the Olympics
- Being an official sponsor is beneficial

Sponsorship has become big business in recent years with seemingly every avenue covered, from TV programmes and channels having individual sponsors, through to the naming rights of sports stadiums costing millions of pounds.

The Brand & Comms team at Opinium have been looking at different approaches to sponsorship, both in the UK and across the globe throughout 2016. This report looks at a summer of sport including sponsorship of Euro 2016 and the Rio Olympics. We also review TV sponsorship of some of the best loved programmes on UK TV and look at the reasons why some partnerships have flourished and others have struggled to make an impact.

## A SUMMER OF SPORT

The summer of 2016 has been fantastic for sports fans with continuous action throughout, from Euro 2016 in France, to Wimbledon, through to the Olympics in Rio, where even though some of the medals were won in the middle of the night, the nation was still gripped by the amazing performance of Team GB.

The Brand & Comms team at Opinium have been monitoring sponsorship activity throughout the summer and have found some clear themes that all brand owners should give thought to in the future when considering whether to sponsor an event or not.

Before, after and throughout both the Euros and the Olympics we asked consumers how strongly they associated brands with these events, which allowed us to see which brands really capitalised on the UK's sporting obsession to the benefit of their brand.

### Under dogs winning on and off the pitch at Euro 2016

As we saw on the pitch, with amazing results for the underdogs Wales and Iceland, it was some of the lesser known brands that really capitalised on their involvement in Euro 2016.



UEFA  
**EURO2016**  
FRANCE

### Euro 2016 UK Brand Ranking

Brand	Last week of tournament	Before tournament
	1	1
	2	3
	2	2
	4	5
	5	15
	6	3
	7	9
	8	12
	9	7
	9	9
	11	6
	12	18
	13	12
	13	8
	15	9
	16	18
	17	12
	18	15
	19	17
	20	18
	20	18

Little-known in the UK, Chinese electronics brand **Hisense** shot up our Euro 2016 brand table, rising from 18th at the start of the tournament to 12th in terms of strength of association to Euro 2016. Brand awareness rose from a paltry 7% to 19% amongst UK consumers, and to a whopping 33% amongst football fans- a rise many marketers would dream of in the space of four weeks.

As always, activation and follow through are crucial in making the most of your sponsorship status. Hisense covered many bases to ensure the first Chinese brand to ever sponsor at the Euros was a success.

This ranged from traditional competitions, Hisense “fan girls” giving out half a million gifts across 51 matches, big screens at fan zones, branded on-screen score updates and ground hoardings. An active social media presence generating over 10 million impressions, tied in with significant product promotions, meant that Hisense’s Euro 2016 exposure in China alone resulted in returns exceeding investment after only the group stage. Hisense’s brand director Zhu Shuqin confirmed that *“it has been the most successful brand marketing campaign in the company’s 47 years of history.”*





Another big winner was **Turkish Airlines**; positioned 15th at the start, moving up to a lofty 5th by the end of the tournament- even ahead of the mighty Nike in 6th. Surprisingly amongst football fans, Turkish Airlines was the 2nd most associated brand with Euro 2016. This is a phenomenal effort in beating the likes of Coca-Cola and McDonald's. The campaign also helped deliver a significant increase in brand favourability. This was driven by a highly effective multi-channel campaign combining in-game exposure, through hostesses welcoming the teams to the pitch at each match, significant social media activity including celebrity endorsement from Didier Drogba, and stunts like taking over the Champs Élysées and repainting the livery of an aeroplane. They also presented the official song for Euro 2016, 'This One's For You' featuring David Guetta ft. Zara Larsson.

The consumer impact that these two brands had shows that the large sporting event is not just the domain of the galactic brands, and in fact, you potentially have more to gain the smaller you are if you commit to firmly supporting your activity across the board.



## BEING OFFICIAL IS BENEFICIAL

In the world of “it’s not that cool to be an official sponsor”, the official brands clearly outperformed the ‘rest’ at Euro 2016. This is evidenced by official big brands such **Adidas** and **Carlsberg** driving a stronger association to the tournament than their “non-official” rivals Nike and Carling. Official smaller brands like **Hisense** and **Turkish Airlines** also did very well compared to the muted response for other brands such as **Vauxhall** and **Lucozade**.

Interesting comparisons can be drawn from looking at how directly competing brands approach sponsorship and activation at the large sporting events. Adidas vs Nike is an obvious pairing to look at.

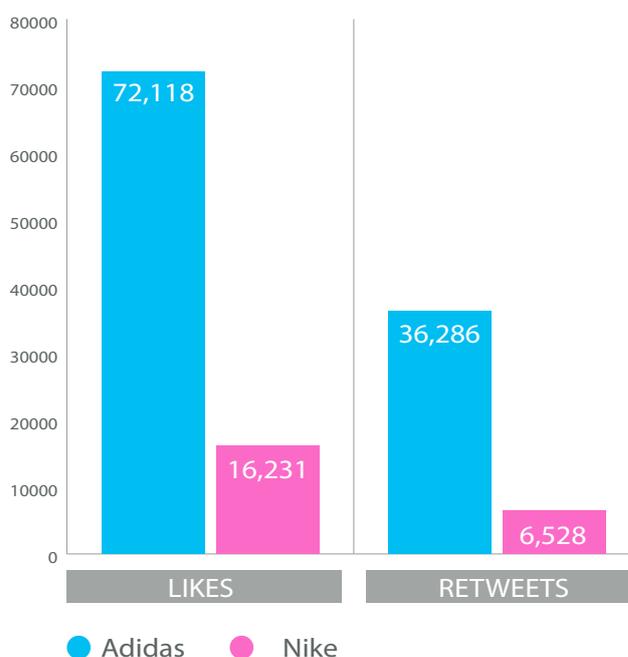
Adidas used official sponsor status with pitch side hoardings and producing the official ball, but it was on social media where they really beat their arch-rival. Despite Nike Football having a much more developed online Fan base than Adidas Football (42 million Facebook followers’ vs 22 million respectively), and having more than twice the number on YouTube (2.7 million vs 1.1 million respectively), it was Adidas that dominated social media throughout the tournament. Adidas beat Nike on 27 out of 30 days in terms of daily online share volume

Adidas and Nike have a similar amount of followers on their Twitter football accounts (3 million vs 2.8 million respectively).

However, Adidas won on this platform, amassing a total of 36,286 retweets for their Euro related tweets (excluding retweets) and 72,118 likes. Nike lagged behind significantly with 6,528 retweets and 16,231 likes.

Video content delivers the highest rates of engagement on social media and this was one area that Adidas excelled in. They consistently released video content throughout the Euros in an easily shareable format. Using their exclusive access to Euro 2016 game footage, they produced original videos of their sponsored players at the matches, interspersing them with their own footage promoting their products.

### Number of likes and retweets on Twitter for Euro 2016 related tweets



Another heavy weight match up that pits an official sponsor against a non-official key rival is Carlsberg and Carling.

## The sheer breadth and depth of Carlsberg's activation totally outgunned Carling.

Carlsberg's campaign made good use of humour and originality to get fans engaged. They struck a fun wager with the supermarket brand 'Iceland' on social media over the outcome of the England vs Iceland match, resulting in Carlsberg delivering beer to Iceland's head office.

Other fun stunts included 'pubstitution', which saw 19 pubs rebranded in a patriotic manner throughout the UK, and producing a tactical press ad in the Metro on the day of the England vs Wales game, imploring bosses to establish a 90-minute break at 2pm for fans to watch the game. The ad stunt received some of the most liked and shared posts on social media out of all of Carlsberg's posts during the tournament.

Their social media video releases were also humorous, including sending Sky Sports pundit Chris Kamara on the London Underground with a walking stick and aged 25 years, giving tickets to those who gave up a seat to him to. They also used promotions, competitions and outdoor advertising to provide a fully integrated campaign.

Carling's social media response was weak at best. Their choice of influencers was not as strong; Paul Ince and Jimmy Bullard lack the more wide spread appeal of Carlsberg's influencers including Stuart Pearce, David James, Steve McManaman, Claude Mackingale, Christian Karembeu, Marcel Desailly, and Peter Schmeichel.

Their social media campaign was also lacking in quality. Many of their tweets involved GIFs of Jimmy Bullard watching the games, which were meant to be comedic, but came across as unauthentic and exaggerated. The average number of retweets and likes they received were five times less than Carlsberg; Carling's Euro related tweets has an average of 23 retweets and 31 likes in comparison to 115 retweets and 124 likes for Carlsberg.



# NOT THE GREATEST BRAND SHOW ON EARTH

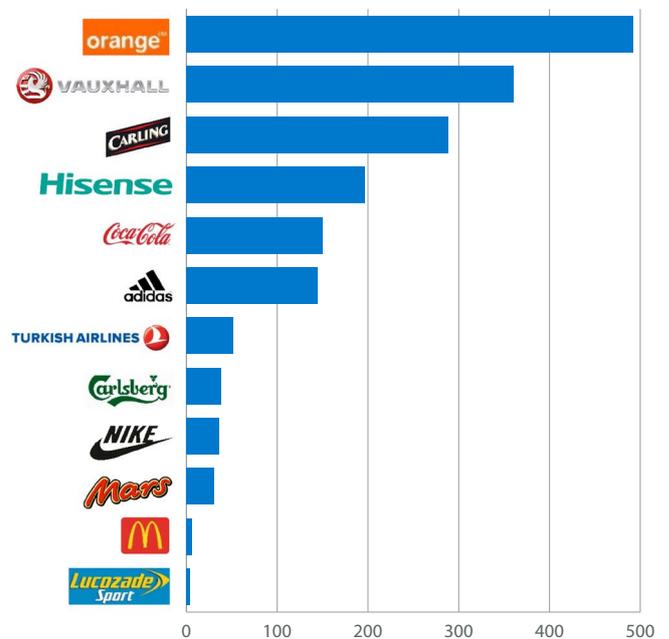
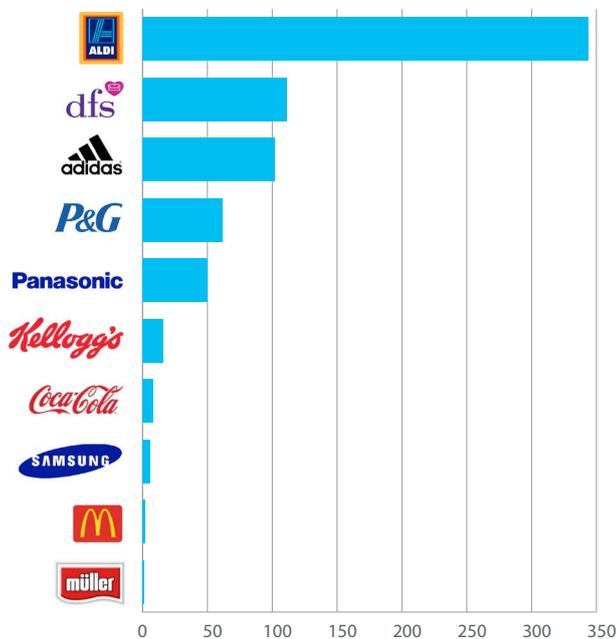
Brand performance at the Olympics is a stark contrast to the Euros. Total brand association increased 65% from the start of the Euros to the end, compared to only a 6% change in brand association during the Olympics. The brands sets are different across the two events, but if we compare performance of 3 big players (McDonald's, Adidas and Coca Cola) at both events it follows the total market with a collective increase of 47% at the Euros vs 5% at the Olympics.

Given the spending power of these three giants who struggled to make the Olympics work for them, and despite the committed audience the Olympics has in the UK (42 million tuned into Rio in the early hours) it clearly struggles to deliver from a commercial brand owner point of view.

Euro related brands were generally more active on social media. As the below graphs show, more brands had over 100 tweets related to Euro 2016 than to the Rio Olympics.

Number of Olympic related tweets

Number of Euro related tweets



For the Olympic data, the UK Twitter accounts of Adidas, Panasonic, Samsung, McDonald's, Coca-Cola, and Müller were used. For the rest of the brands, their global accounts were used.

For the Euro 2016 data, the football related Twitter accounts for Adidas and Nike were used. The sports account for Lucozade was used. The UK Twitter accounts of Coke, Hisense and Carlsberg were used. For the remaining brands, the global accounts were used.

Looking at Adidas' social media activity across the two events, they had higher fan engagement, in terms of likes and retweets, with their Euro related content than their Olympic related ones. They received on average 268 retweets and 465 likes per tweet for Euro related content compared to 123 retweets and 360 likes for Olympic related content.

**When reviewing the campaigns that had been used through both events, those used in the Euros were more fan specific, which allowed for more interaction.**



Orange's whole #orangesponsorsyou Euro campaign narrative revolved around celebrating the fan 'as the focal point of the tournament', as did their social media activity. Their main advert of the campaign, released across 28 countries, featured Zinedine Zidane helping to select the 'world's ultimate fans' by sending scouts to scour the globe for the biggest fans. Through the 'Fan of the Match' competition, Orange and Zidane selected one fan that stood out the most from the crowd, rewarding them with one of the 20 tickets to the final. The giveaways did not just stop there; in total 3,000 tickets and 200 VIP experiences were awarded to fans.

Orange also successfully activated fan engagement through their daily illumination of the Eiffel Tower every day of the games. They monitored social media channels for supportive posts from fans for their team, and transformed this into a larger than life sponsorship activation, lighting up the Eiffel Tower in the colours of the nation that had the highest number of engagement. The nightly unveiling was broadcast by the livestreaming app Periscope and uploaded on their YouTube account. Fan selfies would also appear on the Eiffel Tower activation.

Turkish Airlines #EuropesBest campaign highlighted the best fans from around the world and the lengths they go to in showing their passion and love for their national team.

Carlsberg's promise before the Euros was to 'do it better for the fans', putting fans at the heart of activation. One way they did this was by having fans vote for their man of the match after every game on social media, with a fan given the opportunity to present it. Their global TV campaign showed fans storming the street and uniting for their right to great football, with Marcel Desailley, a former Chelsea footballer, as a French revolutionary shouting "Let Them Drink Beer".



By comparison, Olympic campaigns were nowhere near as interactive or fan-focussed. A couple of Olympic sponsors did have campaign narratives revolving around fans, but they tended to be narrower in focus. For example, P & G celebrated mothers, whilst Coke focused around the concept of friendship. However, Panasonic's campaign was all-encompassing, focussing on #Superfans, which celebrated the fan support of the Olympic Games and Team GB. They had a dedicated Superfans website which collated fan pictures that were shared through the #superfans hashtag on social media.

In addition to being more fan-focussed and having more passionate fans, the Euros had more eye-catching, larger-than-life activation compared to the Olympics. Orange's Eiffel Tower illuminations, Adidas imposing a Paul Pogba façade over the Arc de Triomphe, and Turkish Airlines taking over some key monuments with their branding created news exposure.

From a marketing point of view, the Olympics is potentially too vast and therefore difficult to target and engage with consumers, which ultimately means achieving cut through to land your message becomes increasingly difficult.

## GLOBAL REACH



### Olympics 2016 International Brand Ranking

BRAND	RANK
	1
	2
	3
	4
	5
	6
	7
	8
	9
	10

This ranking is based on data from the following markets: India, China, USA, Mexico, France, Germany, Hong Kong, Australia, South Africa, UK

However, looking from an international perspective, the global reach of the Olympics provides an interesting backdrop to look at the regional strengths of some powerhouse brands and assess how well their sponsorship programmes have worked across markets.

Coca Cola is the No.1 brand that consumers associate with the Olympics across the 10 markets Opinium conducted research in. Interestingly, Samsung and Visa come in ahead of McDonald's. This is mainly driven by a lower ranking for McDonald's from countries such as China and Hong Kong, despite being ranked 2nd from Western markets such as UK, USA and Australia.

Samsung's global footprint clearly outshined competitor Panasonic, attaining 2nd spot in the table. There are definite areas of strength for the Korean tech brand being ranked No.1 in India but as low as 8th in China, compared to Panasonic's 3rd place in China and 5th in India. Omega is another brand with quite differing performance across markets. Omega ranked 2nd in China, France and Germany but then down to 6th in USA and South Africa and 7th in India. General Electric is also a brand that has strength in the attractive Chinese market, with a ranking of 4th compared to an overall ranking of 8th.

So, although there was little movement in association to the Olympics during the games in the UK, we can see that it does still provide a platform for brands to flex their muscles. This is highlighted by Coca Cola being the no.1 brand in 9 out of 10 markets but also for other brands to show their regional strength across the globe.

## WIMBLEDON DELIVERED

Although playing to a much smaller audience, Wimbledon provided a better increase on brand advertising awareness for tournament and player sponsors than the Olympics did. The two events make an interesting comparison; both shown on the BBC and lasting for a two-week period. The brands performing well at Wimbledon tended to be tournament sponsors such as Slazenger, who promoted their long-running heritage with the tournament and had celebrity hook-ups with

Tim Henman on Twitter. Lavazza and Pimms also saw a rise in advertising awareness, with the latter using Judy Murray as their Chief Foliage Officer on social media and a strong in-store promotional presence. Wimbledon also showed the power of superstar endorsement. Despite Novak Djokovic exiting the tournament early, advertising awareness of his sponsors Peugeot and Uniqlo still saw an impressive increase amongst tennis fans.



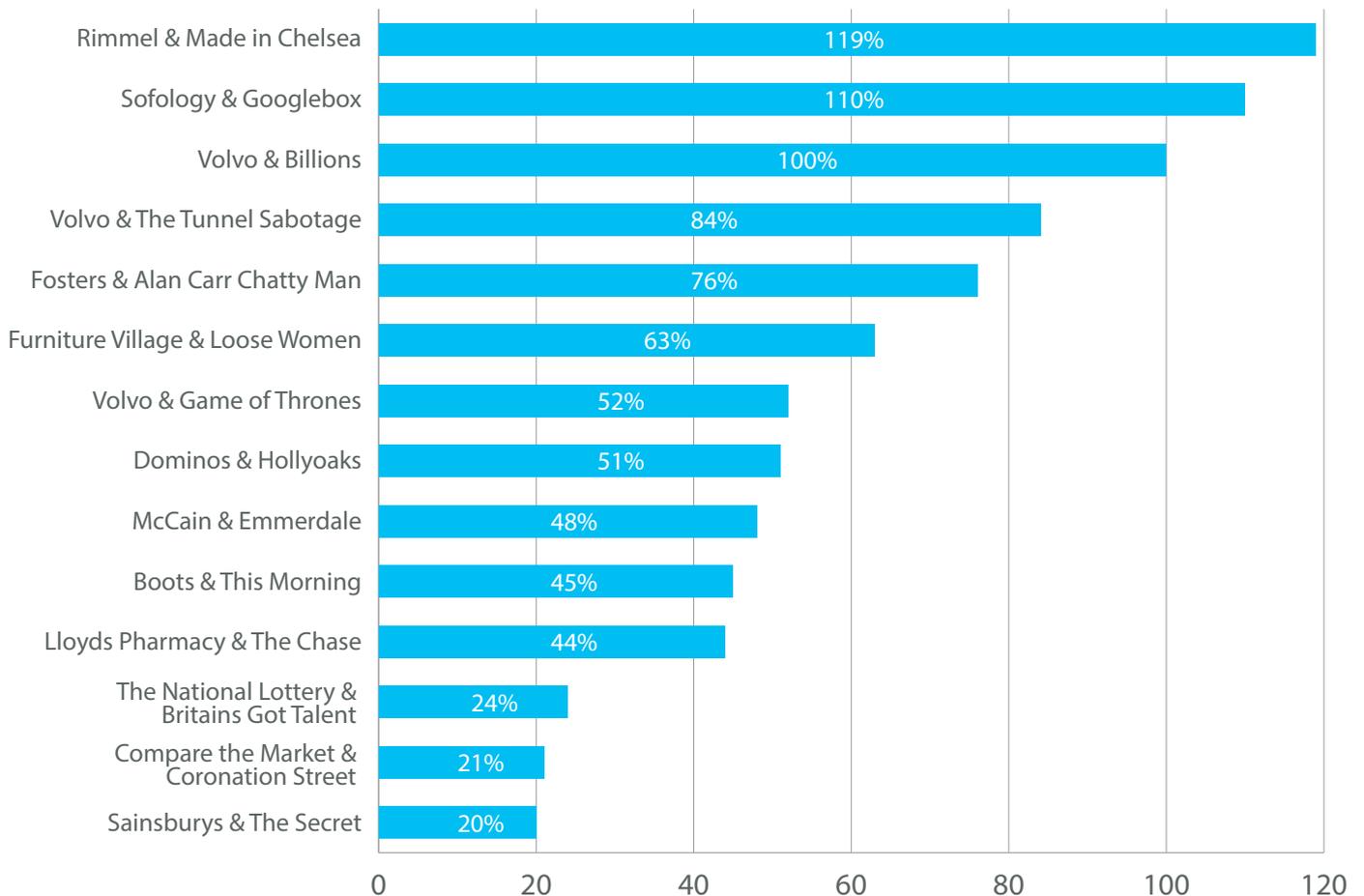
# THE PARTNERSHIP OF BRAND AND PROGRAMME

Moving away from event sponsorship, TV Programme sponsorship has become increasingly popular in recent years, with brands of all shapes and sizes attempting to lodge their brand into consumer minds whilst tuning into their favourite shows.

This form of sponsorship gives a brand a consistent platform to build brand awareness and associations from, but is the repetition a good thing? Are they just talking to the same audience over and over again?

We've looked at the programme sponsors of some of the largest shows on TV; an eclectic mix from Coronation Street and This Morning through to Game of Thrones and Googlebox. The results make for an interesting reading. Of course, any analysis of this type needs to bear in mind the opportunity to see the activity in the first place, so we made sure that we had enough viewers of the chosen programmes and compared the results to the general public.

## % change on advertising awareness - Watch programme vs Nationally representative UK adults



## BRAND & PROGRAMME SYNERGY IS KEY

All of the programme sponsorship covered in the research had a direct effect on advertising awareness for the brands involved. Awareness levels were higher amongst viewers of the programmes vs all adults aware of the brand in question. However, the degree of impact differs hugely. Two of the strongest performers are Rimmel & Made in Chelsea, and Sofology & Gogglebox. Although this might sound obvious, the success of these two campaigns is based on brand and programme synergy, but this key factor is often forgotten, as evidenced by some of the weaker performers – the link between Lloyds Pharmacy and The Chase doesn't appear to be that obvious.



## DEMOGRAPHIC FIT

The demographic fit of brand users and viewers of Rimmel & Made in Chelsea is a good one; advertising awareness for the brand is highest amongst younger adults which matches up well with the core audience of Made in Chelsea being younger.

But of course any brand targeting a younger audience has to have a social media strategy as well. Rimmel London tweeted regularly during airing episodes using the #MadeinChelsea hashtag. Rimmel also uploaded the type of videos on YouTube that would appeal to their prime consumer base - the Made in Chelsea cast getting makeovers as well as #ChelseaStyleSecrets. The Channel 4 online platform also reinforces the brands name with the programme in the minds of Made in Chelsea viewers; it has small Rimmel adverts beneath the make-up tutorial videos featuring the cast with #ChelseaStyleSecrets that take you to the Rimmel website.

Demographic fit also explains the differing performance of Volvo's partnership with Sky Atlantic programmes Game of Thrones, Billions and The Tunnel Sabotage. Volvo is predominately a brand of the middle aged family man, and that is reflected in awareness of the brands activity when analysed by those viewing these three shows in particular. Game of Thrones has the weakest performance, with an audience split equally by gender and with nearly 50% coming from the 18-34 year old age range. Compare this to the viewers of Billions, 63% men, and The Tunnel Sabotage, 57% male and 63% being over aged 35, you can quickly see how the demographic marriage of brand and programme can have a significant effect on results.

## SUBJECT MATTER SYNERGY

A different type of synergy aids Sofology & Gogglebox. Here there is a clear link from the brand and the programme content- a programme featuring people sitting on sofas watching TV being sponsored by a Sofa brand clearly resonates well with the audience of the show.

Sofology were also very active on Twitter, using their mascot Neil the Sloth, who encompasses the brands relaxed attitude, to convey messages about their sofas and to show their partnership with Gogglebox. They used the hashtag #Gogglebox in all their tweets during the shows season, but also tweeted quotes from the show with the hashtag. Their Youtube channel also showed their advert sponsorship of the show and showed idents during the breaks in the show, often using the phrase ‘gogglicious’ to reinforce and connect the viewers to the brand. Furthermore, on Channel 4’s online website, where viewers can watch episodes of Gogglebox, the Sofology branding is used down the sides of the video player

Foster’s association with Alan Carr Chatty Man is also highly successful. This is a strong brand fit, with Foster’s historical advertising having a strong humour element to it, again highlighting the importance of brand fit and how programme content can lead to a more successful partnership for brand owners.

As we have seen from the sports world, sponsorship can deliver significant gains for smaller brands, and it is a similar picture with TV sponsorship with some of the strongest campaigns coming from smaller brands Sofology, Rimmel and Furniture village. However, despite partnering with very popular shows, some of the larger brands like Compare The Market, Sainsbury’s and The National Lottery, see less of an impact on advertising awareness from their sponsorship activity. Of course, these brands have huge budgets and are on our screens a lot already, as is reflected in them having the highest levels of advertising awareness on our list so potentially a re-work of the media plan could be beneficial depending on the financial viability of their current sponsorship campaign.





## THE FUTURE

The world of sponsorship continues to be a huge opportunity to engage with consumers for brand owners and a very lucrative vehicle for content and event providers. However, with every opportunity there is normally a challenge and such is the equation for potential sponsors. Some brand owners can look back with pride at what they have achieved in raising the profile of their brand and improving consumer perceptions through their sponsorship-inspired campaigns. Others will be wishing they had done some things differently. One thing is clear to see though, the consumer pulling power of sponsorship remains phenomenal, and it is down to the brand owner to choose the right vehicle to promote their offering.

*(For more insights into the world of sponsorship: [stevelooney@opinium.co.uk](mailto:stevelooney@opinium.co.uk))*



## **Steve Looney // Research Director**

Steve has over 15 years of experience working in market and consumer research – and has delivered insights for clients from small start-ups through to iconic brands.

He leads the Brand & Comm's team at Opinium and has worked on numerous advertising and communications development projects. Helping clients maximising creative impact across a wide range of media channels, right through to the in market evaluation of campaigns and the effect that activity has had on consumers and brand perceptions.

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What people  
think, feel  
and do.

## **About Opinium**

Opinium is an award winning strategic insight agency built on the belief that in a world of uncertainty and complexity, success depends on the ability to stay on the pulse of what people think, feel and do. Creative and inquisitive, we are passionate about empowering our clients to make the decisions that matter. We work with organisations to define and resolve commercial issues, helping them to get to grips with the world in which their brands operate, by ensuring we develop the right approach and methodology to deliver robust insight, targeted recommendations, and address specific business challenges.

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