

Are sponsors connecting with fans? If so, which fan segments have the strongest connection? For all the money sponsors spend on marketing, can fans correctly pick them out of a lineup? And which sports properties have the most sponsor-loyal fans?

Those are some of the questions we set out to answer by analyzing three years' worth of sponsor loyalty studies conducted in partnership with Turnkey Intelligence. The studies, conducted since the summer of 2007, were designed to identify key trends such as fans' recall of official sponsors, and trial and consumption of products.

Since beginning the studies, SportsBusiness Journal has published the results of 15 individual surveys of MLB, NASCAR, NBA, NFL and NHL fans. When we revisited all three years' worth of data, we identified several top-line trends and behavior patterns among specific demographics.

The most visible trend we discovered was that brands can expect a better return on their sports marketing objectives if they target fans age 18-34, non-Caucasian fans, and/or households with kids.



For example, 59 percent of MLB fans in the 18-34 bracket were more likely to consider trying a product or service from an official sponsor, compared with only 36 percent of fans age 35 and older.

Younger fans back up their enthusiasm with knowledge as well. For example, younger NBA fans correctly identified Sprite as an official partner 25 percent of the time, compared with just 6 percent for the 35-and-older age group.

Fifty percent to 60 percent of non-Caucasian fans across the team sports were likely to try a sponsor's products or services, compared with 30 percent to 40 percent of Caucasian fans.

When it comes to recognizing specific partners, 35 percent to 46 percent of Caucasian fans across the team sports indicate they are not sure who the league soda partner is. Conversely, among non-Caucasians, the number falls below one-quarter. And the percentage of non-Caucasian NFL and MLB fans who say it is very important for them to be aware of league sponsors has doubled since 2007.

Similarly, half of NFL, MLB, NBA and NHL households that have at least one child are likely to use a sponsor's products or service, compared with 30 percent to 40 percent for households with no children.

## Methodology

Turnkey Sports & Entertainment, through its Turnkey Intelligence operation, conducted national consumer surveys among a sample of at least 400 members of the Greenfield Online Omnibus panel who were at least 18 years old.

Each survey was conducted during a period that ended with the final weeks of each league's playoffs, based on suggestions made in 2008 by representatives from each league.

Respondents were screened and analyzed based on their general avidity levels of each specific sports property. Fans were categorized as "avid" or "casual" based on their responses to a battery of questions regarding their consumer behavior. For the sake of this three-year analysis, avid and casual fans' responses were combined within each league.

The margin of error for each individual season-ending report was +/-4 percent.

In fact, two-thirds of the fans who fit into all three of those demographic subsets — age 18-34, non-white fans, and living in a household with children — are likely to use a league's official sponsor or product, compared with 43 percent of the fans who are age 35 and older, white and have no children.

"Activating against segments of a fan base offers potential for much stronger return on investment and objective," said Steve Seiferheld, vice president of Turnkey Intelligence. "Demographics represent merely one way to identify segments with higher sponsor engagement."

Of course, we would normally never lump fans from these five properties together to make one blanket statement, but with the demographic trend lines so clear across the leagues, it does help paint one of the pictures that emerged.

**Overall, NASCAR in all demographic subsets continues to have the most loyal and knowledgeable fan base when it comes to sponsors. Sixty-eight percent of fans age 18-34, 63 percent of non-Caucasians and 60 percent of households with children are likely to use a sponsor's product or service, highest in those categories among all properties.**

"This study again validates how NASCAR fans of all demographics are attuned to sponsor messages," said Andrew Giangola, NASCAR's director of business communications. "They're not only aware of the companies in the sport but also consciously support their brands."

From a brand perspective, tenure played a critical role in recognition rates. Anheuser-Busch, for example, has a partnership dating to at least 1998 with MLB, the NBA and the NHL, and was one of the brands most likely to be correctly identified as such by fans of each of those leagues. The beer manufacturer is also still reaping the benefits of a two-decade NASCAR partnership that ended prior to the 2008 season.

Similarly, Visa saw its awareness numbers increase each year, coinciding with renewals of long-term commitments to the NFL (since 1995) and NASCAR (1999). MasterCard's MLB partnership (since 1997) also saw an improvement in fan recognition.