Sponsorship & COVID-19

INSIGHTS FOR BRANDS AS WE "RE-BOOT"

Date: September 24th, 2020 - 1pm
Presenter: Norm O'Reilly

PRESENTATION

PLAN FOR THE NEXT 20 MINUTES

- Topic: Sponsorship & COVID

- PART 1: A Bit from 2019's "Glory Days" (what we hope to return to)
  - Canadian Sponsorship Landscape Study, 13th Edition (Pre-COVID)

- PART 2: SPX COVID Studies
  - SponsorshipX Surveys – 4 Rounds: April, May, June, September 2020
  - Industry Expert Input – June 2020
  - Author Experiences/POV

“Glory Days”

13th Annual CSLS

13th ANNUAL

CSLS

CANADIAN SPONSORSHIP LANDSCAPE STUDY

SPONSORSHIP
MARKETING
COUNCIL CANADA

IMI

Lead Author: **DR. NORM O'REILLY**

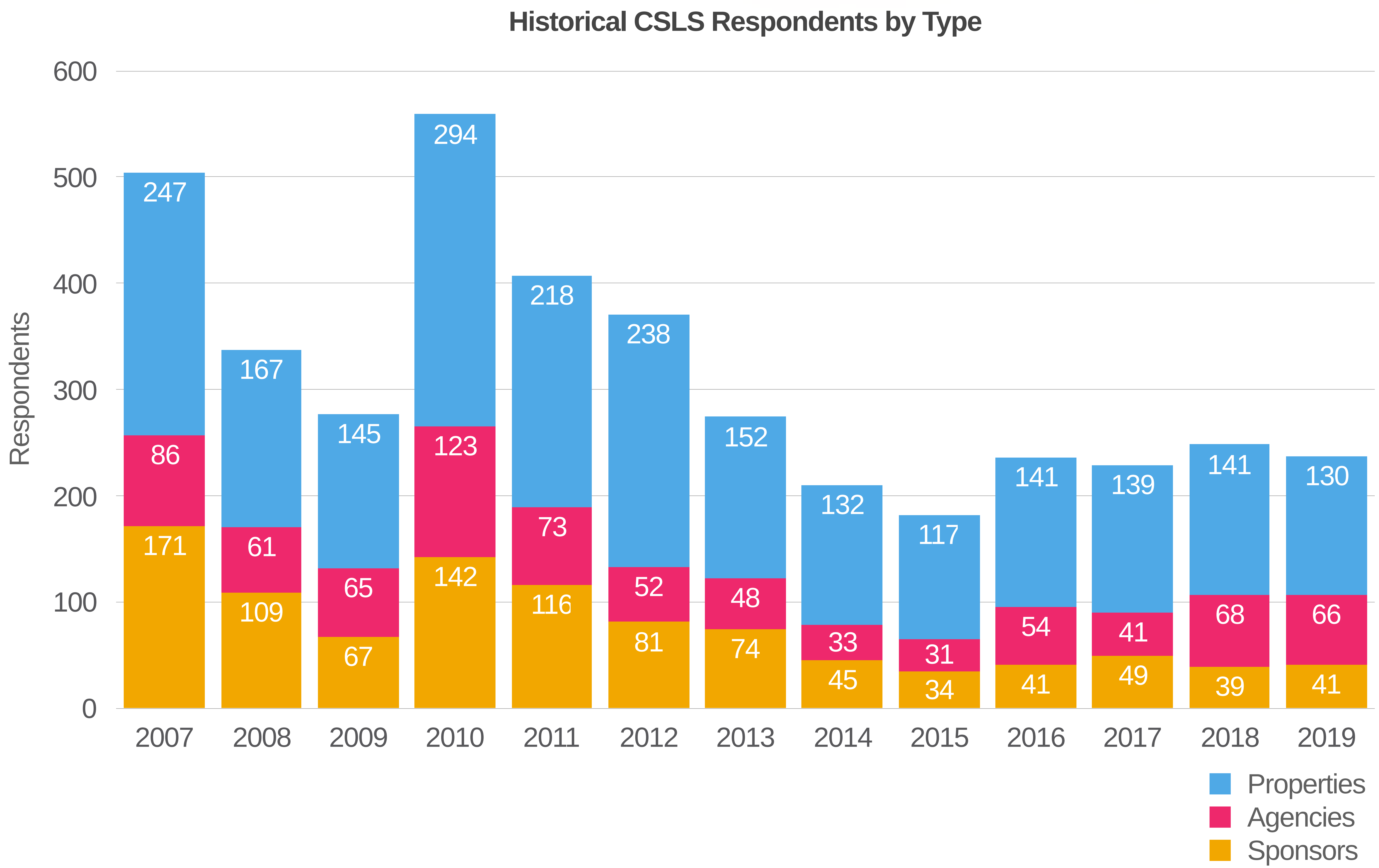
Results Highlights

13th Annual - Full reports at www.sponsorshiplandscape.ca

- ***Smarter?*** | *Activation, Measurement and Servicing*
- ***Balanced?*** | *Rights Fee Spend vs. Activation*
- ***Bigger?*** | *The Big Players Assert Themselves, Return of Bias*
- ***More Advanced?*** | *Gender, Agencies, Objectives*

RESPONDENTS

Historical CSLS Respondents by Type



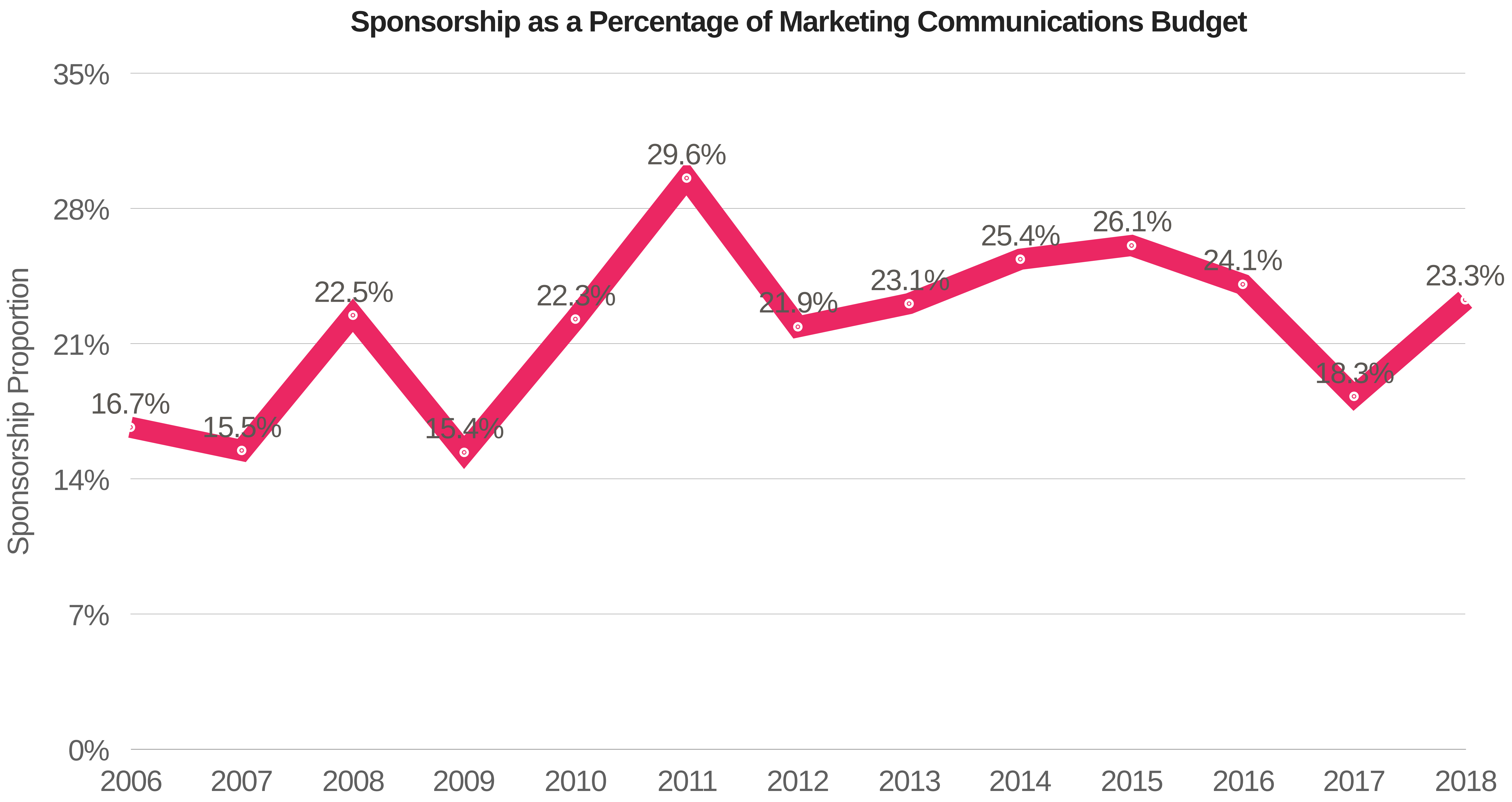
DATA

4,075
Total Respondents

NOTE

After going online in 2010, number of respondents continually declined until a survey redesign in 2016.

PROPORTION OF MARCOM BUDGET



DATA

23.3%
In 2018

NOTE

Among those organizations that use sponsorship, about 1 in 4 marcom $'s are spent on sponsorship.

CANADIAN INDUSTRY SIZE

DATA

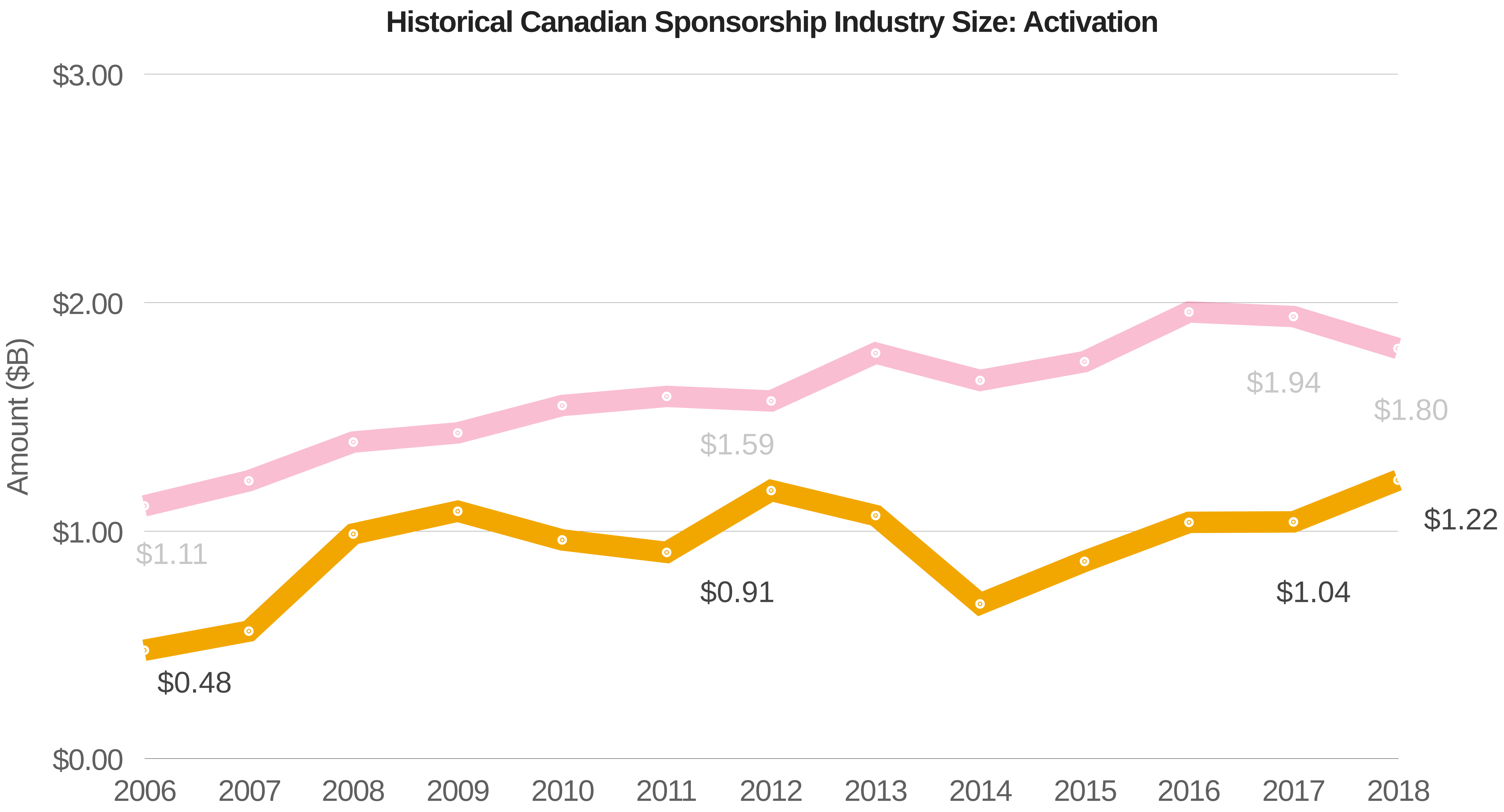
$1.80B

2018 Rights
Fee Spend

NOTE

CAGR of **3.78%**.

CANADIAN INDUSTRY SIZE



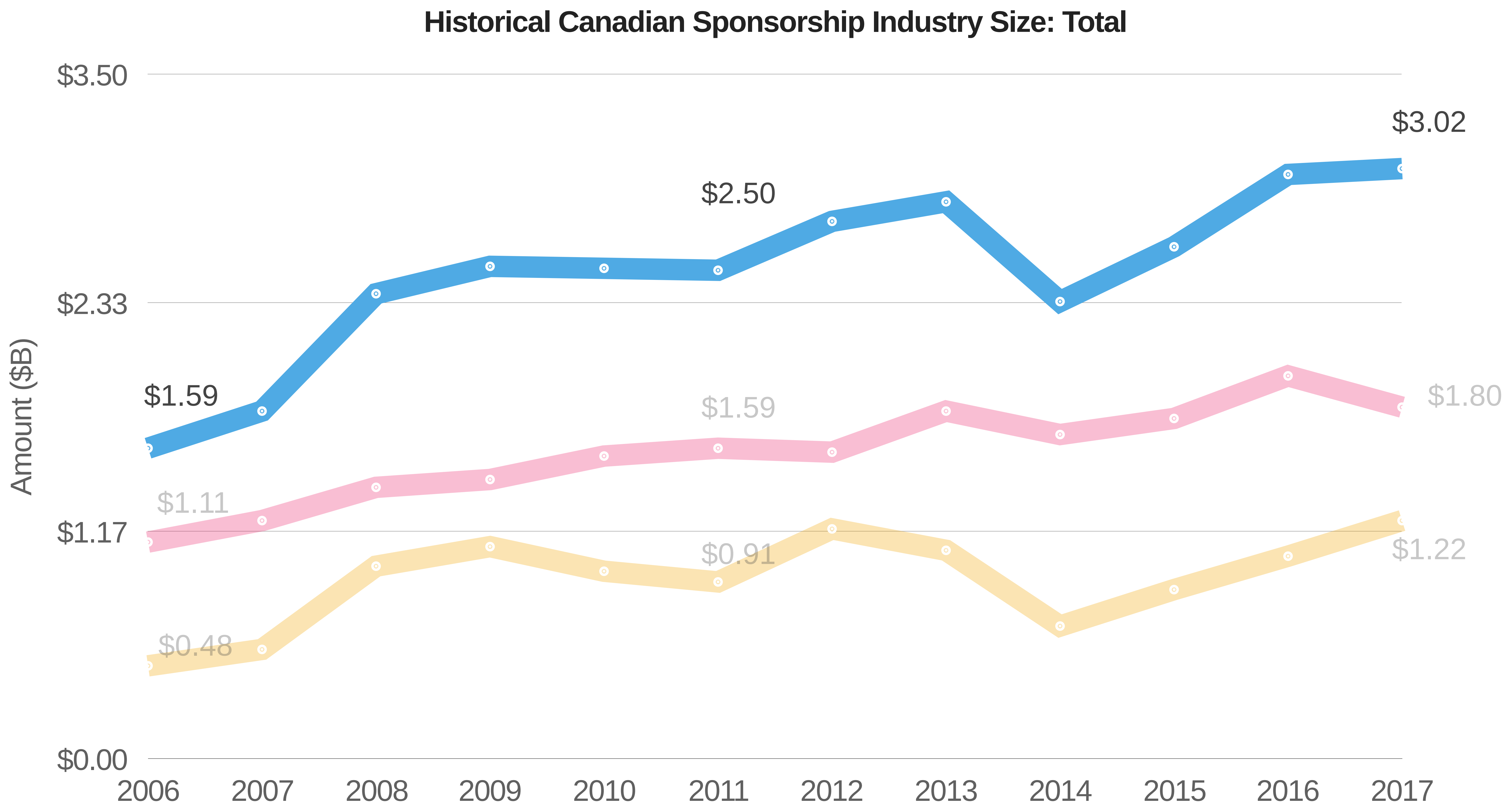
DATA

0.68
Activation to
Rights Fee in 2018

CAGR of
total activation
spend is **7.49%**.

Historically, activation spend has fluctuated considerably more than rights fee spend, but it has increased more relatively than rights fees.

BIG PICTURE: *CANADIAN INDUSTRY SIZE*



DATA

$3.02B

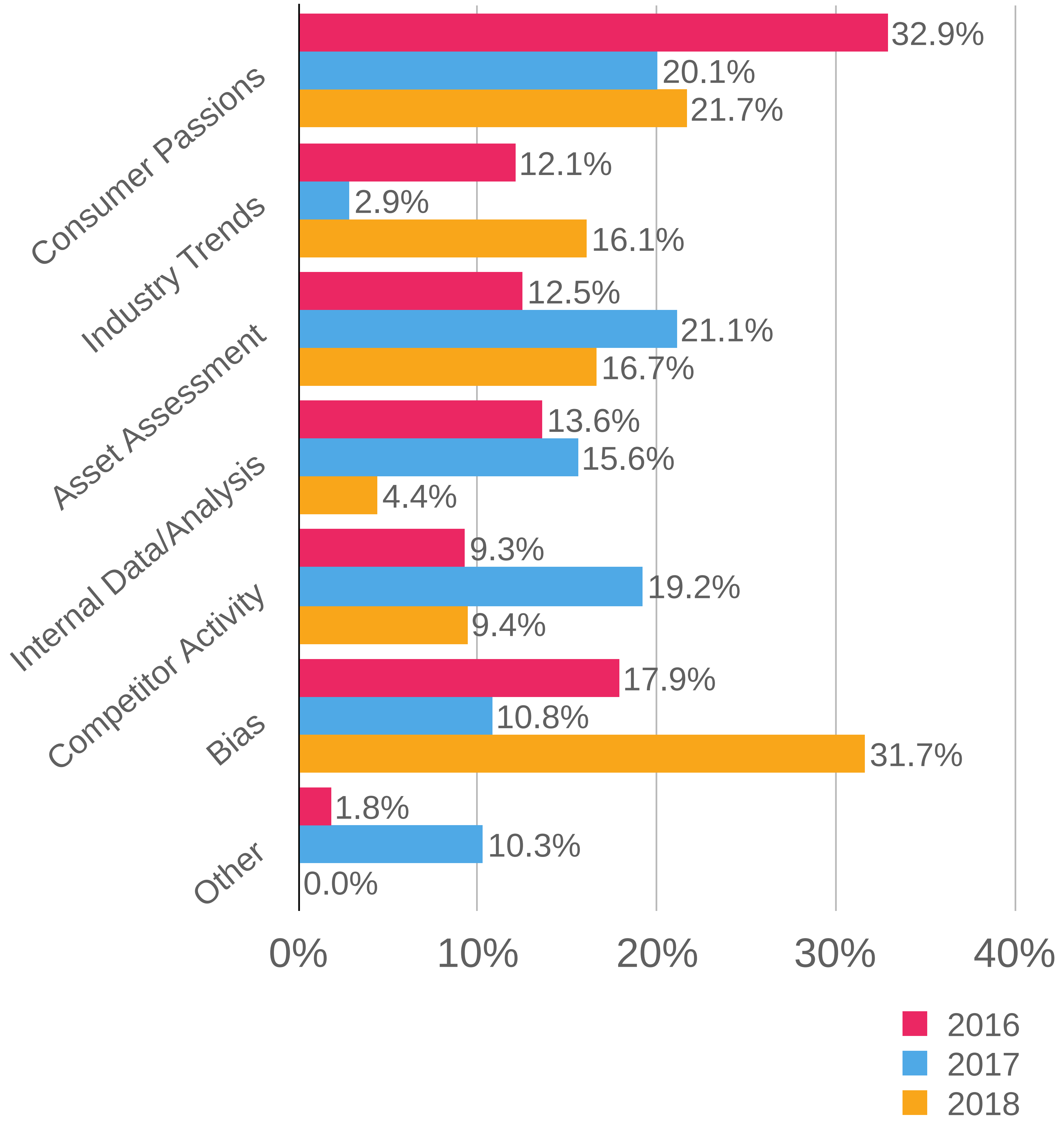
in Total
Industry Spend

NOTE

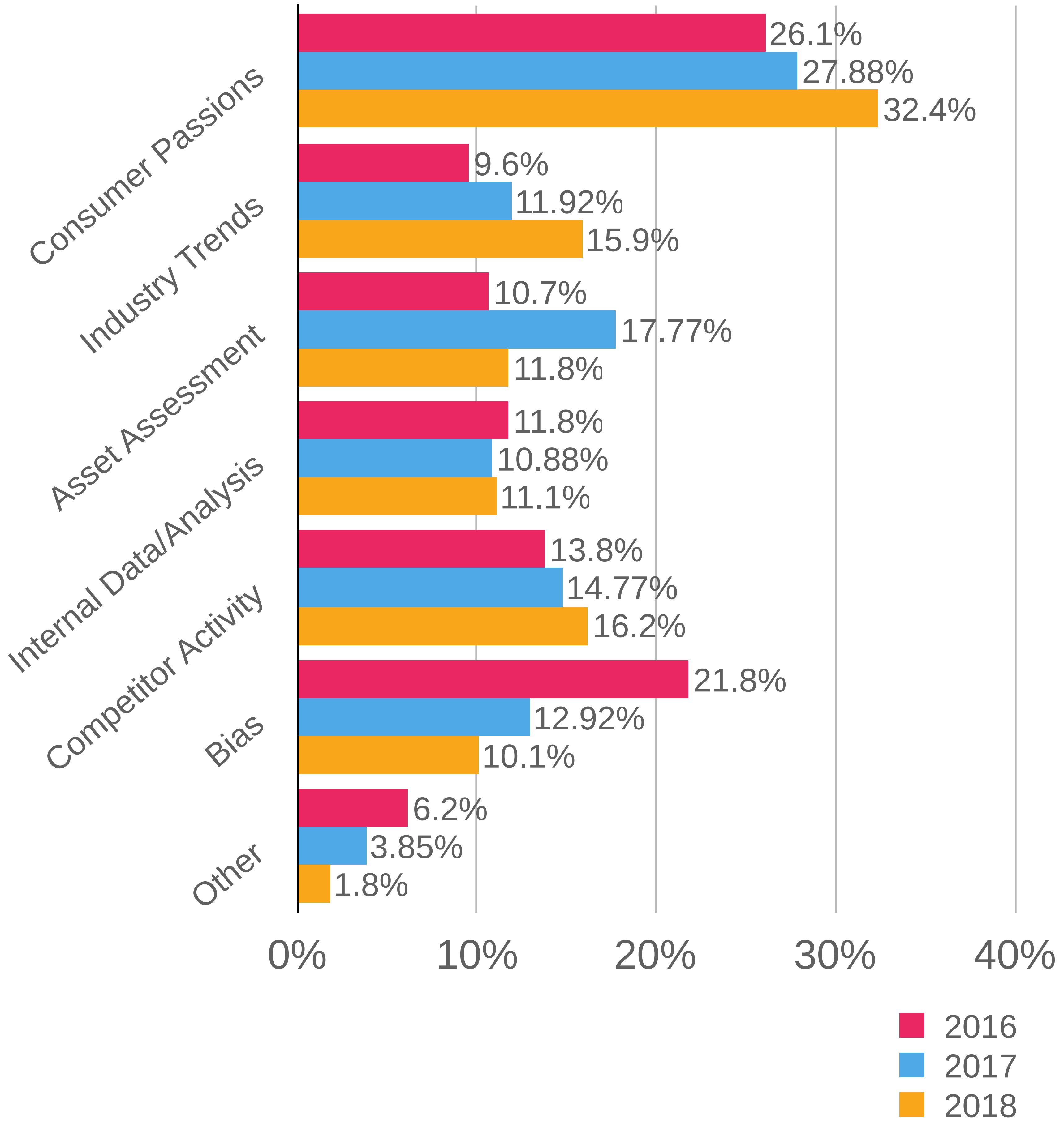
CAGR of rights fees
plus
activation spend
is **5.06%**.

DECISION MAKING

Criteria in Decision-Making:
Sponsors



Criteria in Decision-Making:
Agencies on Sponsors Behalf



DATA

Majority

Of Decisions are About
The Right Factors

NOTE ON 2018

Sponsors report ‘bias’
bounce back
but
agencies disagree and
report very high
“consumer passions”

LARGEST SPONSORSHIP CATEGORY

56%
Pro Sport

23%
Amateur Sport

22%
Arts

DATA

Triple
The size of largest investments in pro sport versus those in amateur sport or the arts

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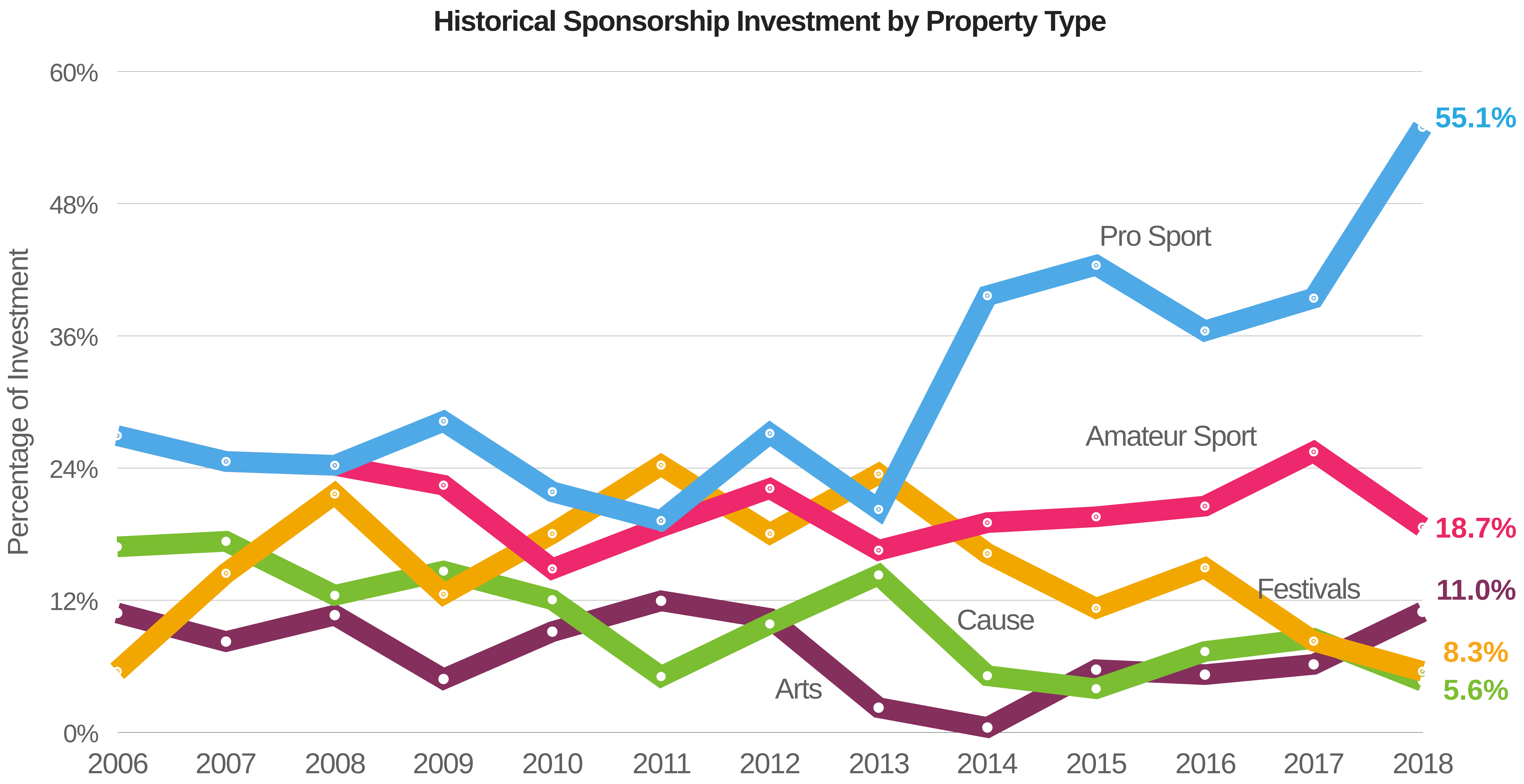
Average Size of Largest Annual Deal: $1.1M

NOTE *Pro Sport: $1.9M*

PROPERTY MIX



DATA

55.1%

of Investment is in Pro Sport

NOTE

Significant shift in 2018 over previous years

SPONSOR INVESTMENT: *PROPERTY REACH*

13-YR AVG | 2018 DATA

“Go Big or Stay Local”

9.6% | 11.8%
International

33.8% | 36.2%
National

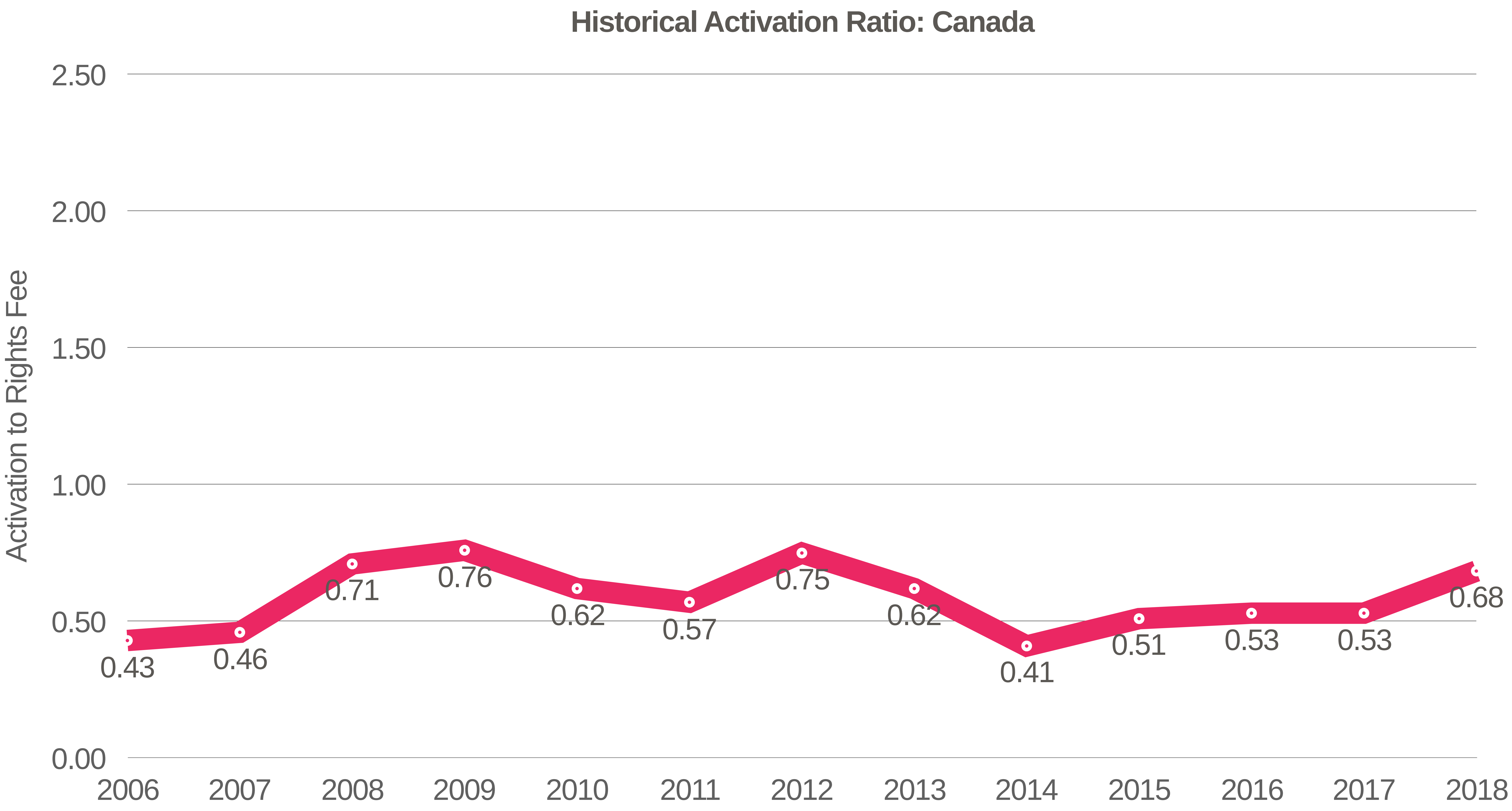
10.3% | 20.4%
Multi-Provincial

17.2% | 7.5%
Provincial

16.2% | 10.4%
Regional

11.9% | 13.7%
Local

ACTIVATION: *RATIO*



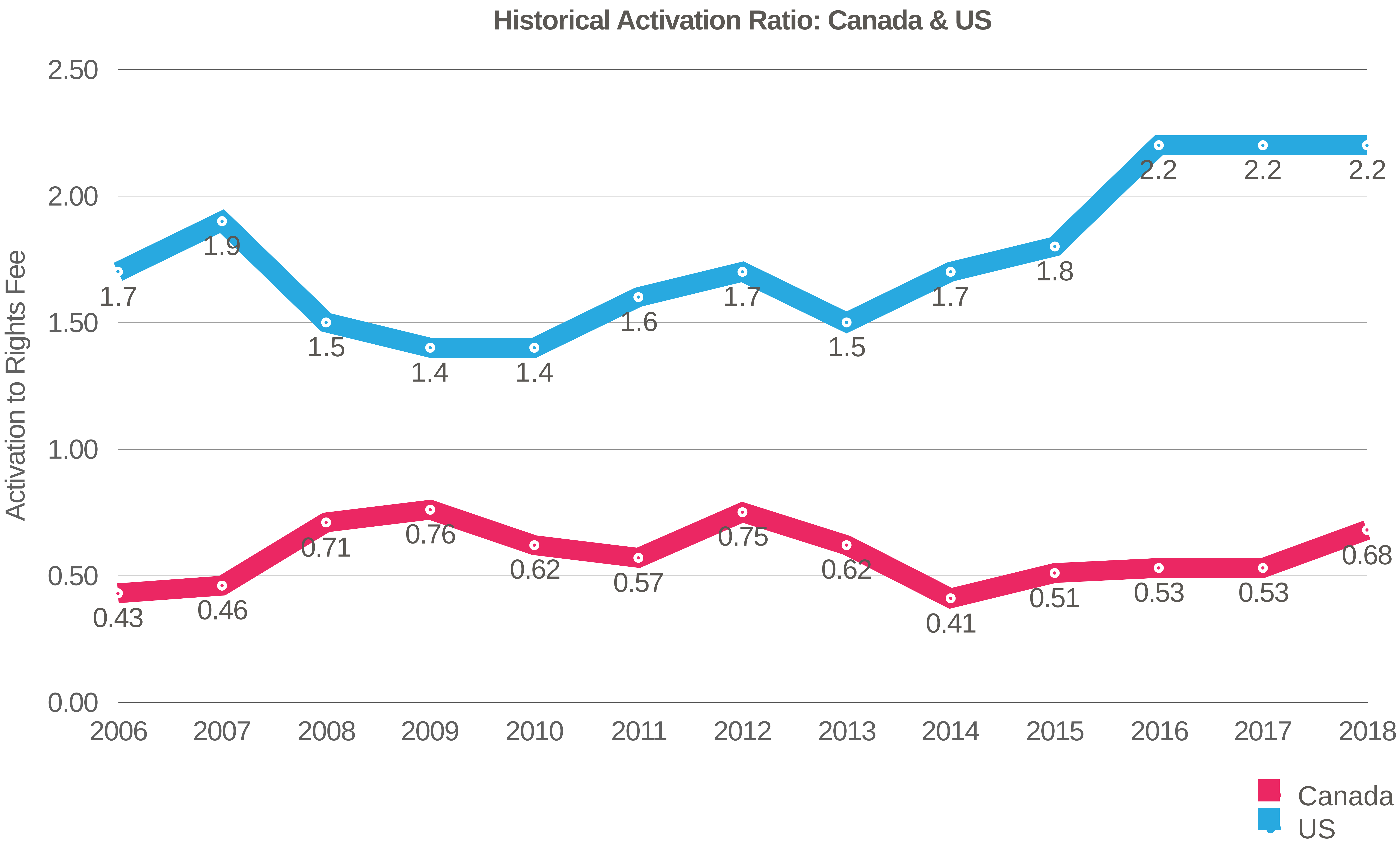
DATA

0.68

Activation to
Rights Fee in Canada.

The highest recorded
number since 2012.

ACTIVATION: *RATIO*



Historical Activation Ratio: Canada & US

DATA

2.2

Activation to
Rights Fee in US

Although improved in 2018, the activation ratio in the US in more than **3X higher** than in Canada.

ACTIVATION: DRIVERS OF ROI - SPONSOR VIEW

#1
Hosting/Hospitality

#1
Product Sampling

#3
Advertising

#5
Athletes

#5
Social Media

#7
Branded Content

#7
Public Relations

#7
Sales/Consumer Promotions

DATA

Shift

Changing of views
in 2018 over 2017

MEASUREMENT IS COSTING US SLEEP

Top Concerns	Meeting Targets*	Demonstrating ROI	Demonstrating ROI	Other*	Demonstrating ROI	Demonstrating ROI	Meeting Targets** Evaluation/Measure
Year	2012	2013	2014	2015	2016	2017	2018

“How to measure ROI on my sponsorship investments.”
- Sponsor

“Delivering on the promised benefits”
- Property

“How to measure its effectiveness.”
- Agency

“Determining the value of social and digital benefits.”
- Sponsor

“Demonstrating sufficient ROI to prospects and clients.”
- Agency

*Demonstrating ROI #2
**Demonstrating ROI #3

SponsorshipX C-19

INSIGHTS FROM SPONSORSHIPX SURVEYS

SPONSORSHIP IS STILL HURTING BUT IMPROVING

ONGOING INSIGHTS FROM EXPERTS

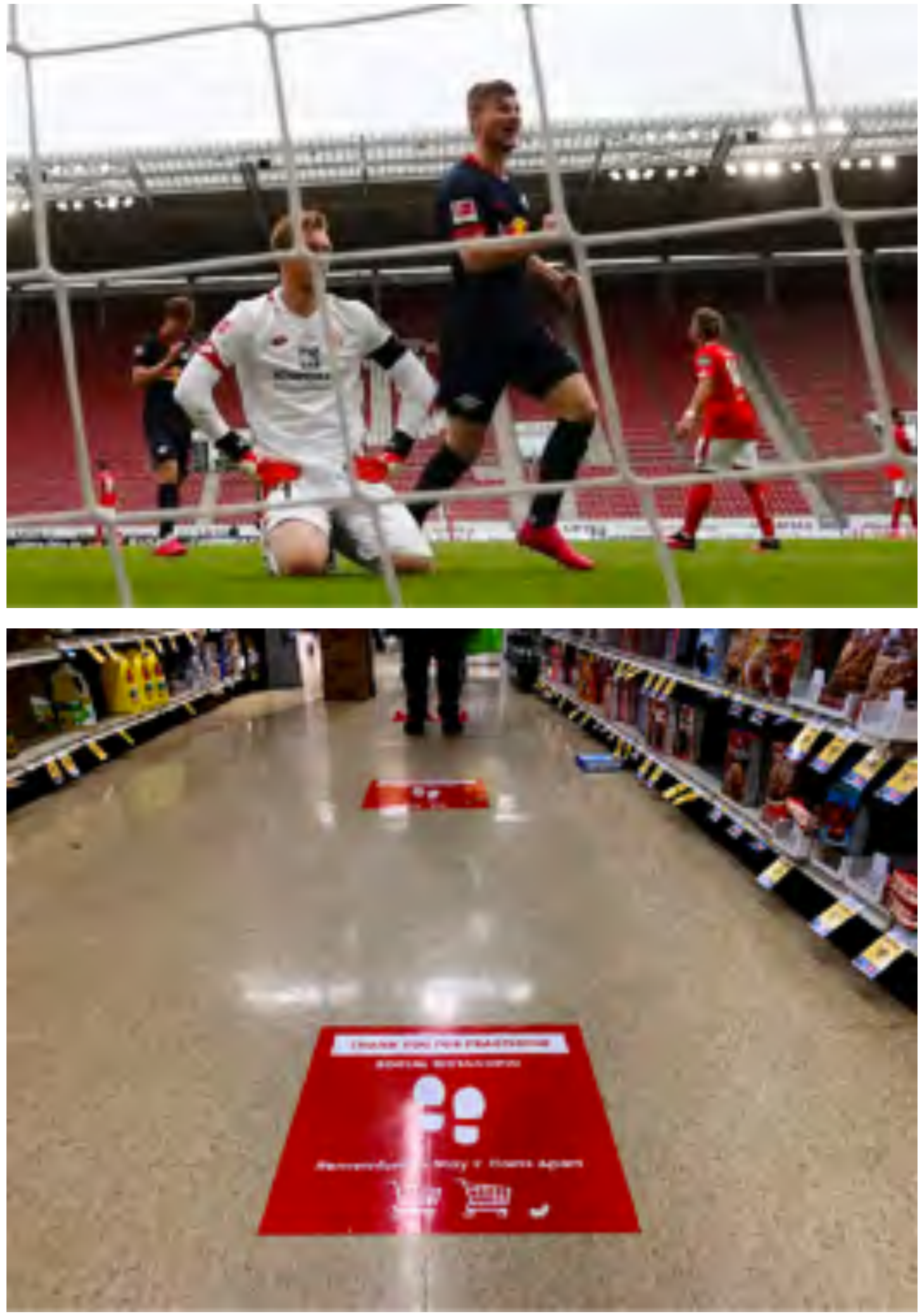
Four versions of the survey

- 627 responses total in April (n=289), May (n=201), June (n=76), and September (n=57)
- Reflective commentary from 10 global executives (May)

SPONSORSHIP IS DOWN BUT NOT OUT

ROUND #1: APRIL 24TH

ROUND #2: MAY 28TH



ROUND #3: JUNE 25TH

ROUND #4: SEPT 10TH

KEY LEARNINGS FROM ROUNDS 1, 2 & 3

From the Survey Data

- April and May: shifting their focus to COVID-19 relief, front line workers, food insecurity and mental health.
- June: added focus of social injustice and growing concern for economy.
- Major reduction in their sponsorship investments, revenues and billings.
- Return to normalcy progressively later with segmented views.
- Esports an alternative only (for the most part) for those already in esports.
- Caution advised around pivoting. Build virtual events/exhibitions where possible.
- For small properties, best approach is to plan, prepare, save and invest.
- Rights fees will do down 50%+ without fans in venue.

KEY LEARNINGS FROM ROUND 2

From the Sponsorship Industry Executives

- “Sponsorship will be back before fans will be back in venues”
- “Expect a big return when sport comes back” and, for some, there is already a “Silver lining”
- “Avoid choosing a theme of the season”, “Don’t try to be clever”, and “Only pivot if it makes sense long term”
- “Properties need to pivot as well” and “Agencies must be true partners”
- “Thoughtful non-endemic sponsorship in esports can work”
- “Brand KPI’s should be the focus of sponsorship efforts”

A Misnomer to Clean Up

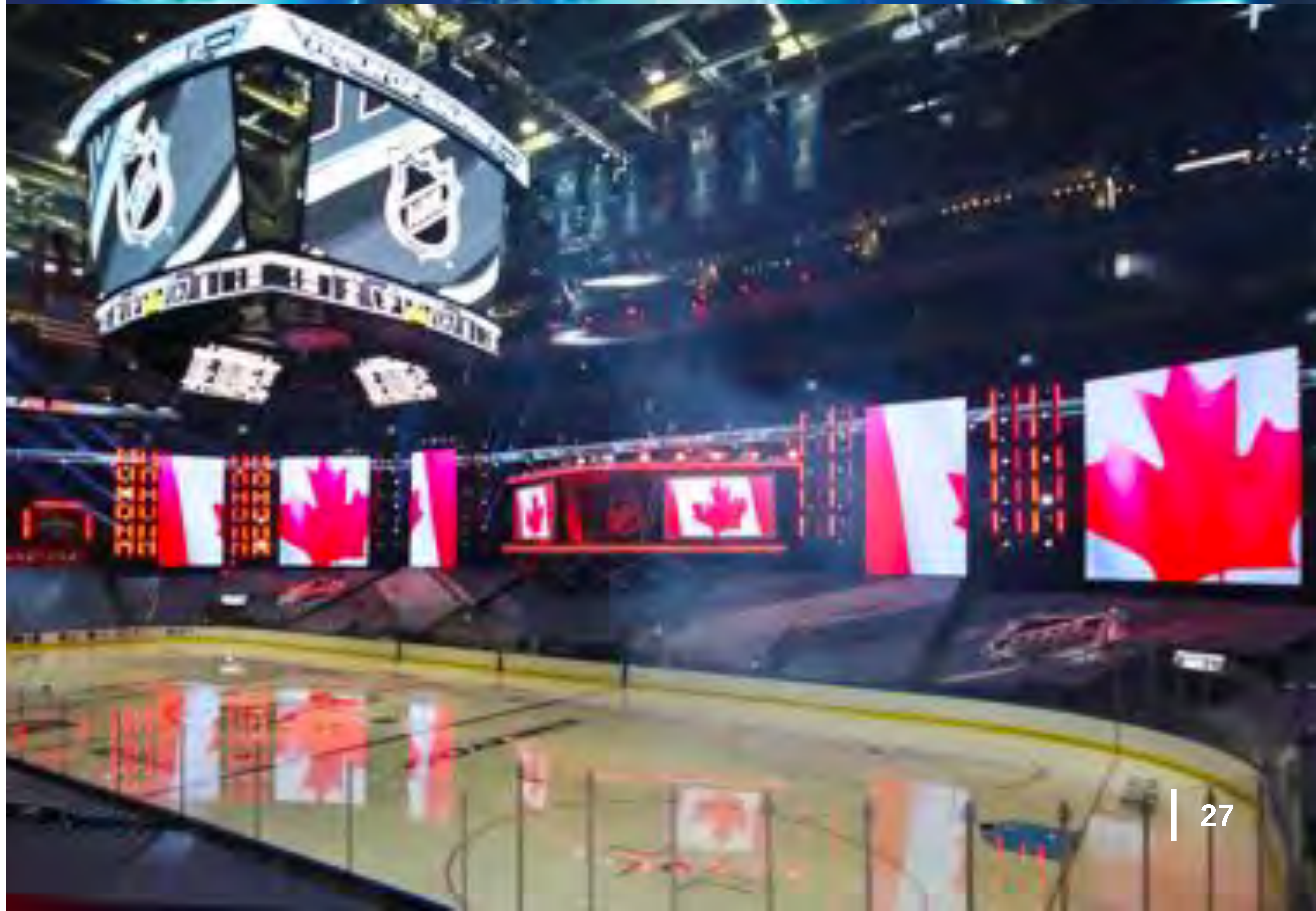
“To say that sport with no fans on site is ‘fanless’, we’ve got a misnomer. To say there are no fans is not accurate. It should be no fans on site. For some properties, partners will have access to thousands, if not millions, of fans via liner and digital channels.”

Stacey Allaster
Chief Executive, Professional Tennis, USTA

KEY LEARNINGS FROM ROUNDS 1, 2 & 3

From our Research

- Mindsets Matter - from physical well-being of ourselves to that of others to emotional well-being to the return of the virus to fear of economic ruin.
- Mindsets Differ - people segment up and have differing views.
- Pandemics and who they work.
- Pivoting - working for hotels, restaurants, digital retailers, but not for everyone.
- What is working?
    - Live Unique Online Viewing/Interactive Experiences
    - Professional Sport Bubbles (but with reduced sponsorship)
    - Focused Entrepreneurship



“NORMALCY”

SPˣ

NORMALCY

Ongoing Pessimistic/Realistic Shift

R1: April
Sept 2020

R2: May
Sept 2020

R3: June
Jan 2021

R4: September
Sept 2021

R4: 2ND MOST POPULAR - APRIL 2021, THEN JUNE 2021

WHY SEPTEMBER 2021?

Most Common Theme:
Live Event Return

“This is when I feel spectators / attendees will be returning to sporting events, festivals, etc.”

“So long as physical gatherings are limited in scope or size, or people continue to perceive them as dangerous, the ripple effects of spending will be felt in all aspects of business, including sponsorship.”

#2 Theme: Vaccine

“There still has not been a vaccine in place that is widely available. Dr. Fauci has said that he is hopeful for a vaccine in early 2021. But once that vaccine is available - how hard will it be to get it?”

#3 Theme:
2nd Wave Certainty

“Malgré les efforts de tous, on se prépare pour une deuxième vague qui peut durer encore une paire de mois.”

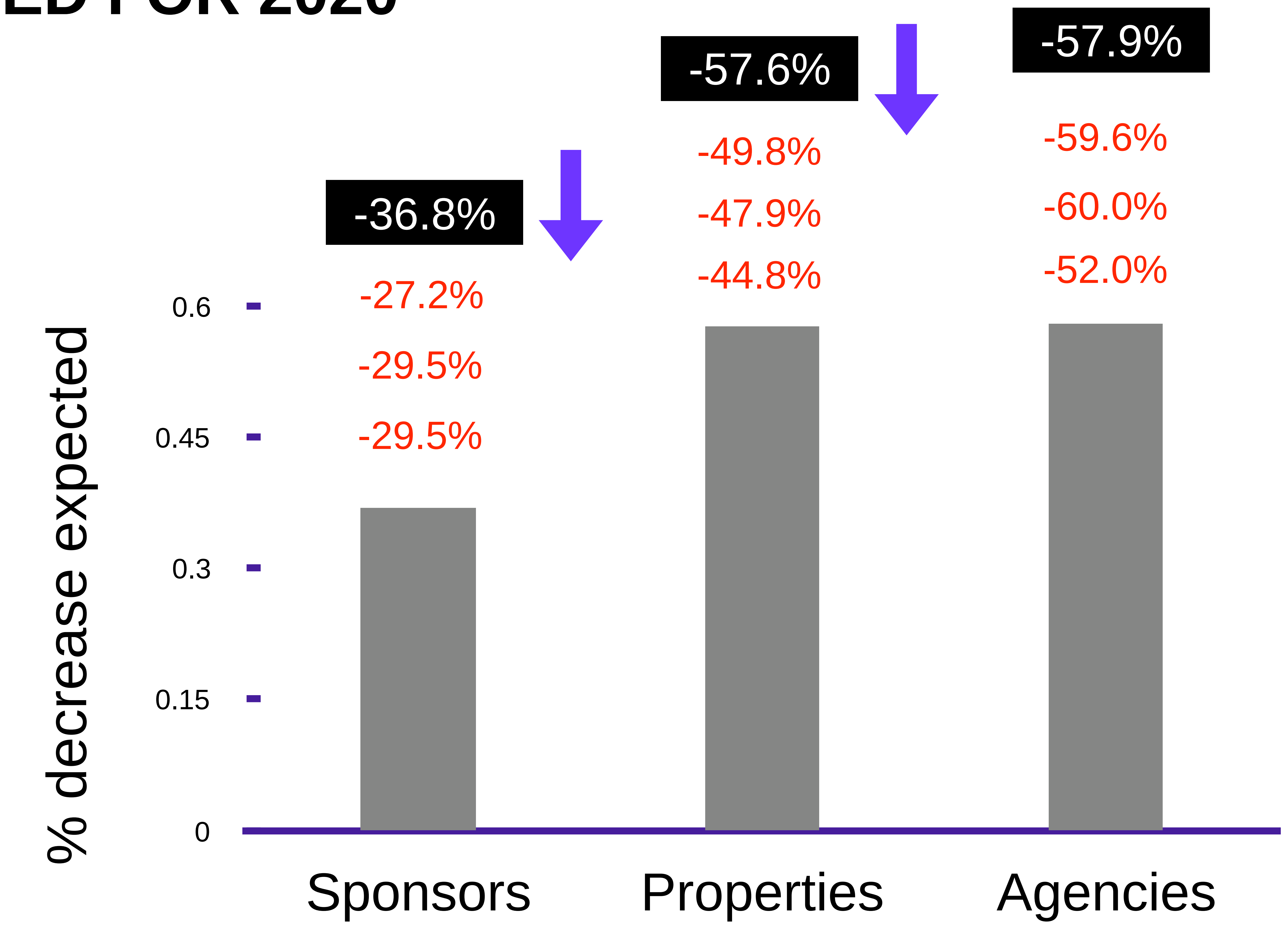
n=57

SPONSORSHIP BUDGETS SLASHED

FORECASTS FOR REDUCTION IN RIGHTS FEES INVESTMENT, REVENUES OR BILLINGS EXPECTED FOR 2020

Shifts Since June

Sponsors - Significant drop
Properties - Significant drop
Agencies - Modest improvement

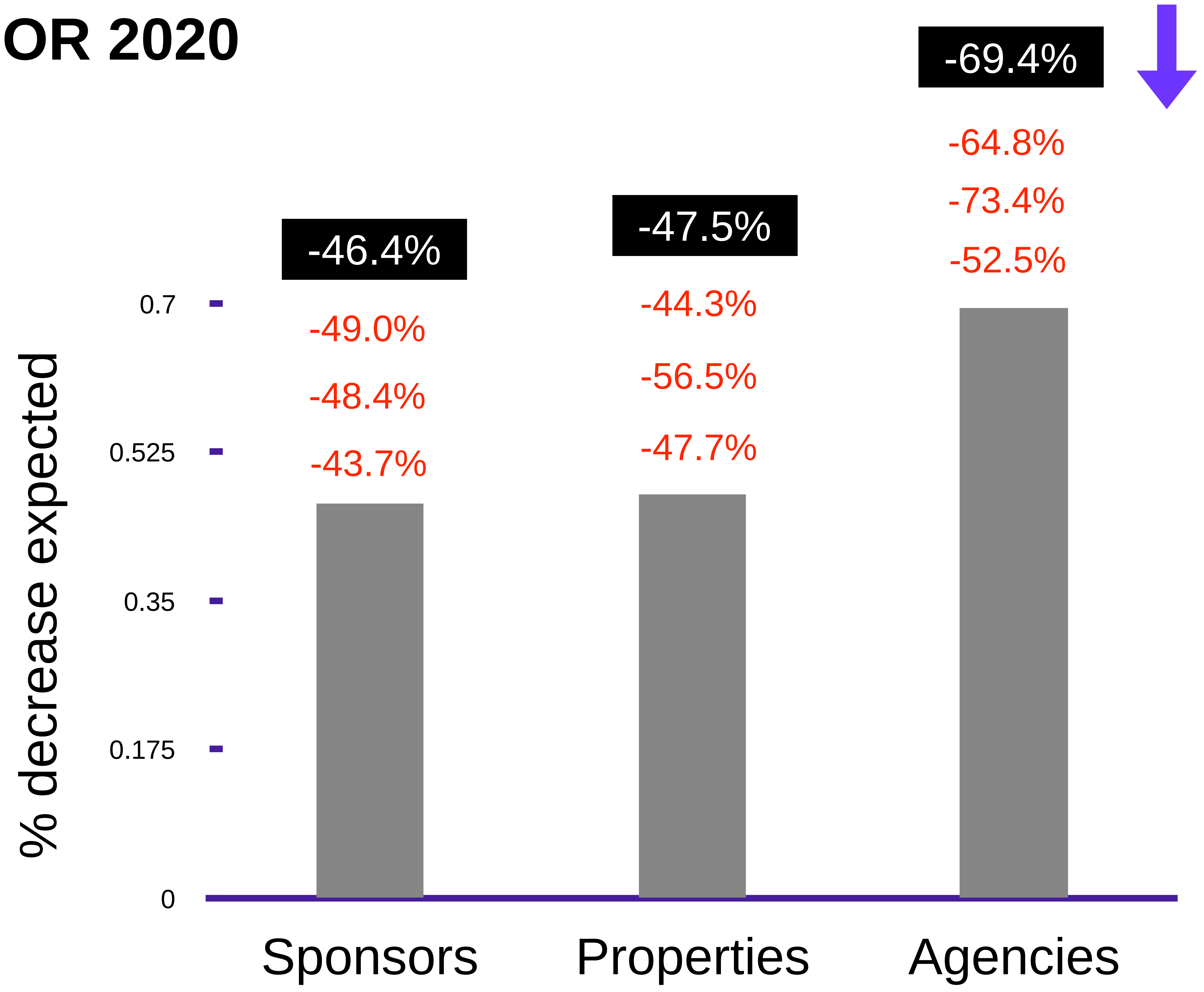


Note: Red Font are Results from Rounds #1, #2, and #3

FORECASTS FOR REDUCTION IN PLANNED ACTIVATION SPEND BY SPONSOR EXPECTED FOR 2020

Shifts Since June

Sponsors - Modest improvement
Properties - Modest drop
Agencies - Drop



Note: Red Font are Results from Rounds #1, #2, and #3

SPONSORSHIP STRATEGY KICK-START

RECOMMENDATIONS FOR A REBOOT

Most Common Theme: Build Creative Sponsorship Assets

“Re-opening conversations; high level planning on new assets for sponsor involvement.”

#2 Theme: Replace Hospitality Based Sponsorship Activities

“Moving activation/hospitality $’s to net new assets, notably digital programs or branded content.”

#3 Theme:
Complete Paradigm Shift

“Look at the world through a different lens. Think of new, innovative ways to reach fans and deploy resources. Use this moment to take risks, and try new ways to connect.”

#4 Theme: Re-Define Exclusivity Windows and ROI

“Understand pivots from physical to virtual…Re-define consumer interactions in a COVID environment - what are key KPIs and how to we re-look at ROI?”

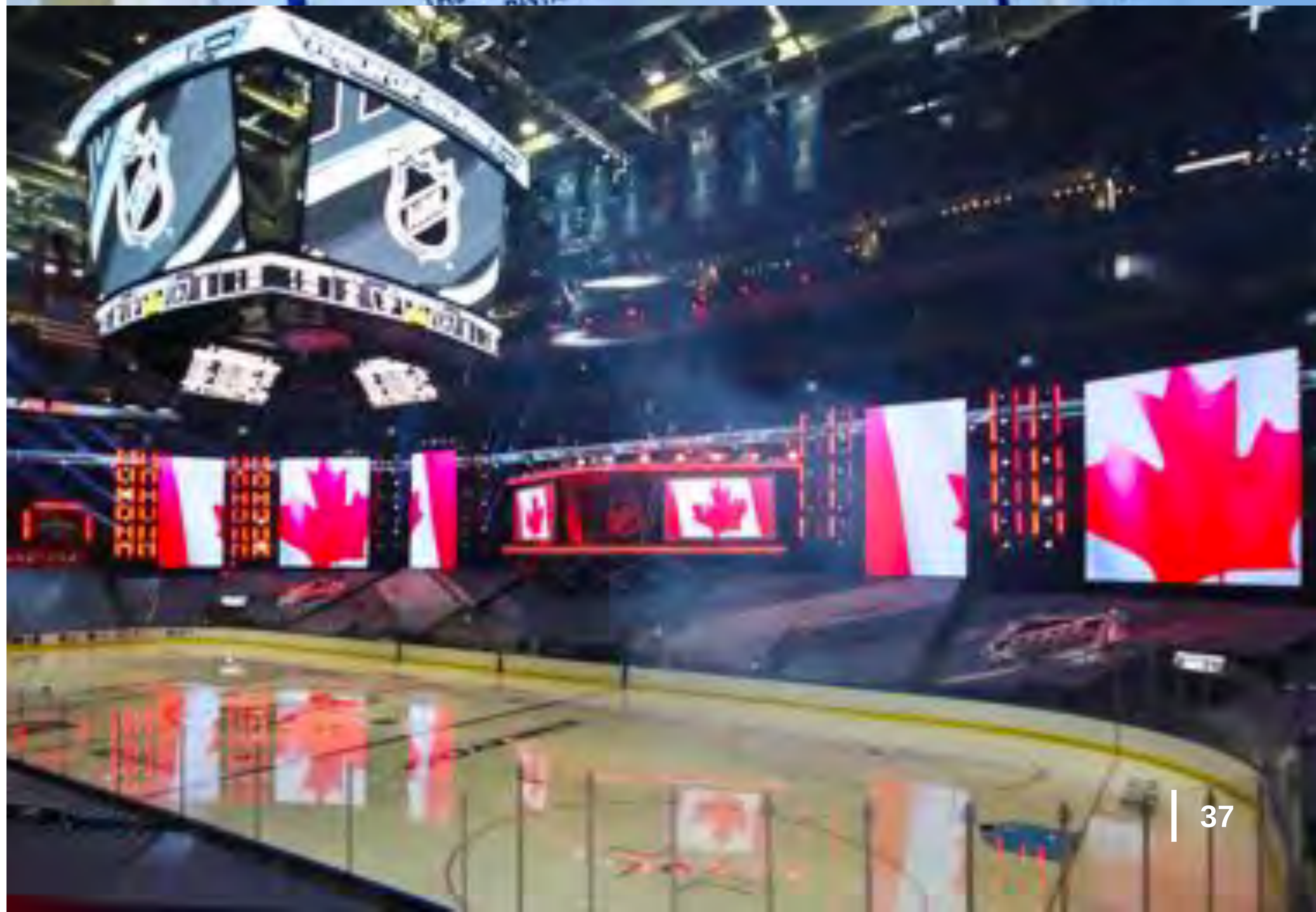
n=57

BEST PROPERTY PIVOT

WHO HAS DONE IT WELL?

Only Two Identified More Than Once:

- NHL/NBA Bubbles (n=47).
- PGA/golf (n=5).



n=57

BEST SPONSOR PIVOT

SPˣ

WHO HAS DONE IT WELL?

Top Answer: Nike

n=57

“Nike created timely content (COVID, BLM), empowered athletes/ambassadors to use their platforms for good. Taken a leadership role (that reflects their market position).”

“Nike (and other sports apparel companies) have managed this well by shifting their messaging.”

“Nike: focusing on community.”

“They have used the pandemic as a means of extending their brand purpose story.”

HOW SHOULD PROPERTIES REBOOT?

IN YOUR OPINION, WHAT SHOULD PROPERTIES DO IN RESPONSE TO COVID-19?

Most Common Theme: A Long-Term Collaborative Stakeholder Approach

“Work in partnership with sponsors, rather than looking out for their bottom line. Deliver value that's mutually beneficial.”

#2 Theme: Direct Communication

“Maintain relationships with their sponsors, work to find alternatives, understand that budgets and being cut and sponsors and trying to find new and cost effective ways to connect with their target audience safely.”

#3 Theme:
Build Innovative New Ways to Reach your Fans, Participants and Followers

“Find creative ways to bring replacement value to partners in the short-term while thinking about how over-delivering on value and objectives in 2021.”

#4 Theme: Don’t Go Back to Old Habits

“Don't fall back to standard digital, social, or broadcasts assets that you have leftover on the shelf. Work with your sponsors and their agencies to create unique content, content, and experiences.”

n=57

SPONSORSHIP ASSETS POST-COVID

CAN YOU THINK OF ANY ASSETS AND/OR ASSET PLATFORMS ADDED DURING COVID-19 THAT WILL STILL BE RELEVANT AFTER COVID-19 PASSES?

"All of the virtual and ship swag to folks' homes stuff."

"Touchless registration, synchronous live streaming of events, with exclusivity heightened for the in person participants - you can charge a LOT more for those precious seats."

"Virtual signage - whole new source of revenue stream that's only just scratching the surface."

"Online conferences/webinar series will stay. Much cheaper to run."

Note: many answers like this

"TikTok. More personable assets vs. Mass approach."

"Enhance online presence capabilities e.g. Drive Ins for film and live music; broader access to entertainment through digital platforms."

"Streaming. Video conferencing. Delivery services."

n=57

RECOMMENDATIONS TO SPONSORS FOR Q4 2020 FOCUS

TOP SPONSOR PRIORITY FOR Q4 2020

All respondents (n=57) provided a response, which grouped into the following themes.

Planning for 2021

Work collaboratively with properties on new assets, creative activations and safety

Focus content on important topics: social injustice, US election, mental health

Build social and digital inventory

SAFETY IN Q4

AS YOU CONSIDER OUTDOOR/ONSITE ACTIVATIONS THIS FALL, HOW CONCERNED ARE YOU ABOUT THE SAFETY OF YOUR ATTENDEES?

All respondents (n=57) provided a response, which grouped into the following themes.

Extreme Concern Related to Safety

Not Relevant in Jurisdiction as Not Allowed

Extreme Concern Related to Brand Risk

EXPERT COMMENTARY

EXPERT COMMENTARY

Sponsorship Normalcy can Happen before Fans are Back in Venues

Robert Zitzmann
Managing Partner, Jung von Matt/SPORTS

EXPERT COMMENTARY

Expecting a Big Return

Steve Tseng
Executive Vice President, Pac-12 Networks

EXPERT COMMENTARY

Choosing a “Theme of the Season” is Not Good Marketing

Matthew Leopold
Head of Brand, PR and Content Marketing, LexisNexis UK

EXPERT COMMENTARY

Properties Need to Pivot

Stacey Allaster
Chief Executive, Professional Tennis, USTA

EXPERT COMMENTARY

Silver Lining

Giulia Zecchini
Commercial Business Intelligence Manager, Formula 1

EXPERT COMMENTARY

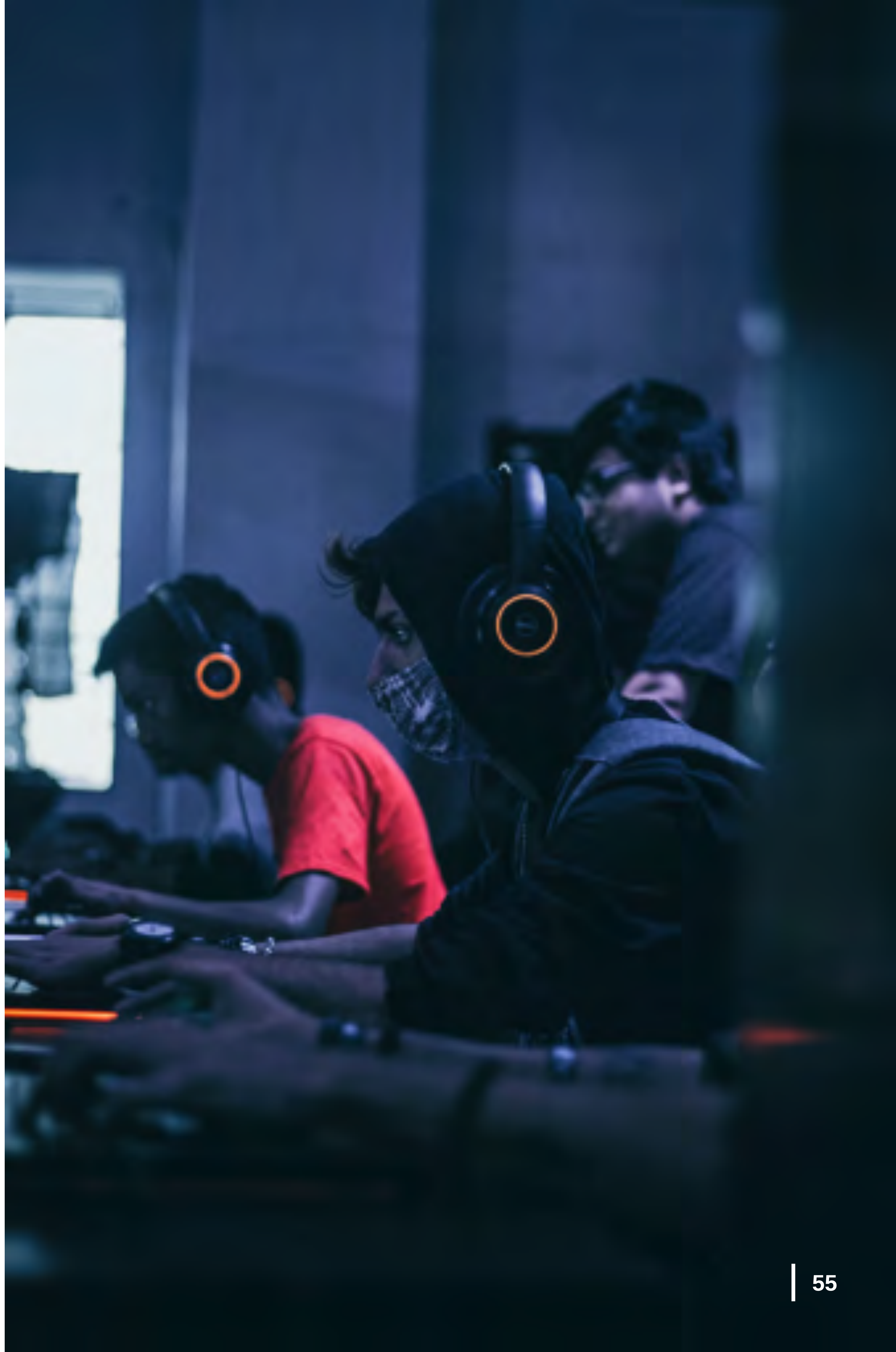
Agencies must Pivot with Agility and as True Partners

Ian Malcolm
President & CEO, Lumency

EXPERT COMMENTARY

Thoughtful Non-Endemic Sponsorship in Esports Can Work

John Pierce
Partner, Player 2 Studios



EXPERT COMMENTARY

Don’t Force Something to be Clever

Bruce Bundrant
CEO & Founder, Riviera Sports Marketing

EXPERT COMMENTARY

No such thing as fanless sport

Stacey Allaster
Chief Executive, Professional Tennis, USTA

EXPERT COMMENTARY

Major Professional Team Sport will be Back Soon but at What Cost?

Luxury boxes, club seats, in-stadium advertising and sponsorship fare are premium.

Robert Boland
Athletics Integrity Officer, Penn State University

EXPERT COMMENTARY

Pivot with your partners and your assets

‘We Are All #Team Canada’

Jacquie Ryan
CMO, Canadian Olympic Committee

Summary

FINAL THOUGHTS

4 iterations of survey over 5 months

1. Sponsorship has been hit hard. It is not getting better. It will be a while…
2. Sponsorship is not tied to live events having fans.
3. We have learned a lot about what to do. Invest in that.
4. Take a “re-boot” philosophy. Don’t go back.
5. There are opportunities and great examples to adopt and/or follow.

THIS WILL END…

Thank you.

How the Sponsorship Industry Can Build Brands and Engage Audiences from a Distance

ENVIRONICS
ANALYTICS

Some Questions We Can Help Answer

How has the PRIZM profile of my customers/donors changed pre versus post-COVID-19? And does that change my partnerships?

Who are my best target customers/donors?

What are the best channels to reach my different Personas?

Which Personas are most relevant within my trade area or market?

Where do I have new and emerging sponsorship opportunities?

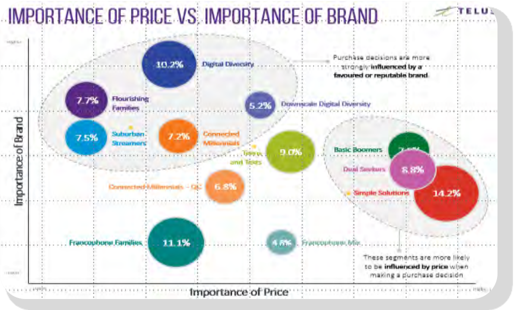
About Environics Analytics

ACTIONABLE DATABASES

High-quality databases

- Over 30,000 data points
- Postal Code Level data
- National coverage
- 360-degree view of customers
- Privacy compliant

ANALYTICS EXPERTISE



Experience and expertise

- Customer profiling
- Segmentation
- Data mining
- Site modeling
- Predictive and
- Custom analytics

ACCESSIBLE OPTIONS

Flexible delivery options

- Data licensing
- Cloud-based analytics platforms
- Project work
- Analytics consulting and custom services

How We Make Data Usable

United States Census Bureau
EQUIFAX
BLS
BUREAU OF LABOR STATISTICS
U.S. DEPARTMENT OF LABOR
homescan
askingcanadians
infogroup
Ipsos Canadian Financial Monitor
IHS
epsilon
AMERICAN COMMUNITY SURVEY
U.S. CENSUS BUREAU
Canada Revenue Agency
National Household Survey
Canada Immigration
vividata
Reading Consumers
UNITED STATES POSTAL SERVICE
NUMERIS
2016
CENSUS · RECENSEMENT
Statistics Canada
BANK OF CANADA

120+ data sources
83 in Canada and 44 in the US

Demographic

Psychographic

Behavioural

Segmentation

Financial

Health

Mobile Analytics

30,000 data points

800,000
postal codes

67,000,000
Zip+4

- Who is your audience?
- What defines them by demographics?
- Where are they and where can we find more likeminded people?
- What do they do in their spare time, aside from attending your events?
- How much disposable income do they spend and on which categories ie. Healthcare, automobile, fitness, telco.
- What kind of media do they consume and how can I reach them and other potential new fans/donors?
- What media channels will produce the greatest ROI in new fan/donor acquisition?
- How does your audience use social media?
- +30,000 more

Our data is privacy compliant and is created with over 100 data sources and partners at the postal/zip code level across North America.

ENVIRONICS
ANALYTICS

Privacy Compliant Data Products

Demographic

CensusPlus
DemoStats
DaytimePop
CrimeStats
AcculturRates

Segmentation

PRIZM NEW
PRIZM QC
DELTA
PRIZM5 Spectra

Mobile Analytics

Mobile Movement NEW

WealthCare

WealthCare New
Vulnerability Index NEW

Financial

HouseholdSpend
FoodSpend
WealthScapes
WealthScapes Lite
WealthTrends NEW
WealthTransfer NEW
AgeByIncome
LiquidAssets
MoneyMatters
Neighbourhood View™

Psychographic

SocialValues

Health

CommunityHealth
Frailty Index NEW
Social Index NEW

Behavioural

Opticks Vividata
Opticks Numeris
Community Life
Giving Back
Homescan® Profiles
Opticks Automotive
CannabisInsights
GreenLiving
Opticks Social
Opticks Mobile
Opticks eShopper (online)

Geographic

Enhanced PCCF
Streets & Boundaries

Postal Code Boundaries

Location

Businesses
Financial Institutions
Spectra Trade Areas
Shopping Centres
Retail Locations
TrafficCounts
Points of Interest

Contact

ResponseCanada Consumer
ResponseCanada Movers
ResponseCanada Pre-Movers

Business

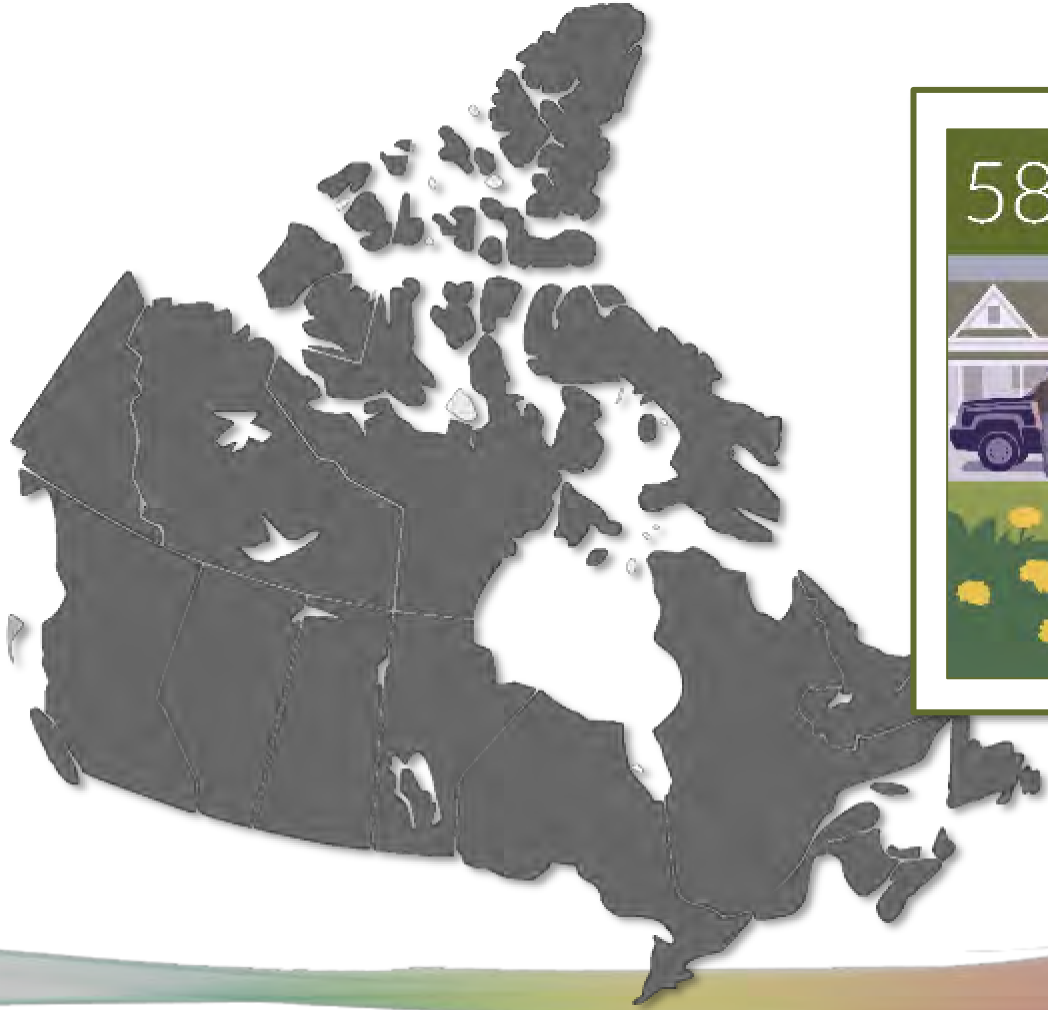
BusinessProfiles

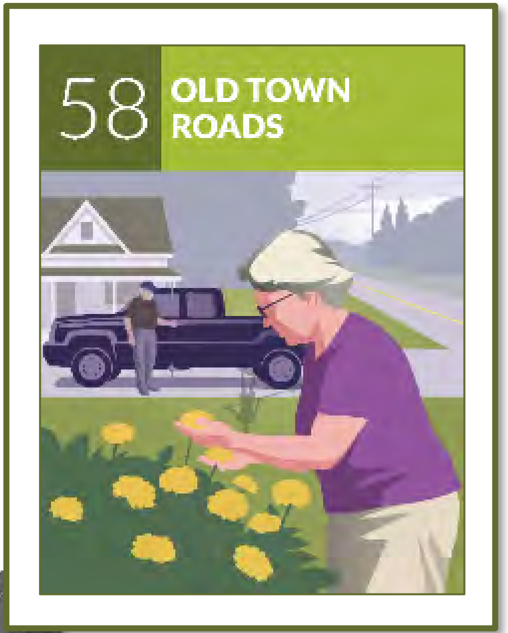
ResponseCanada Business

PRIZM

Canada's leading segmentation system for understanding fans, donors and markets

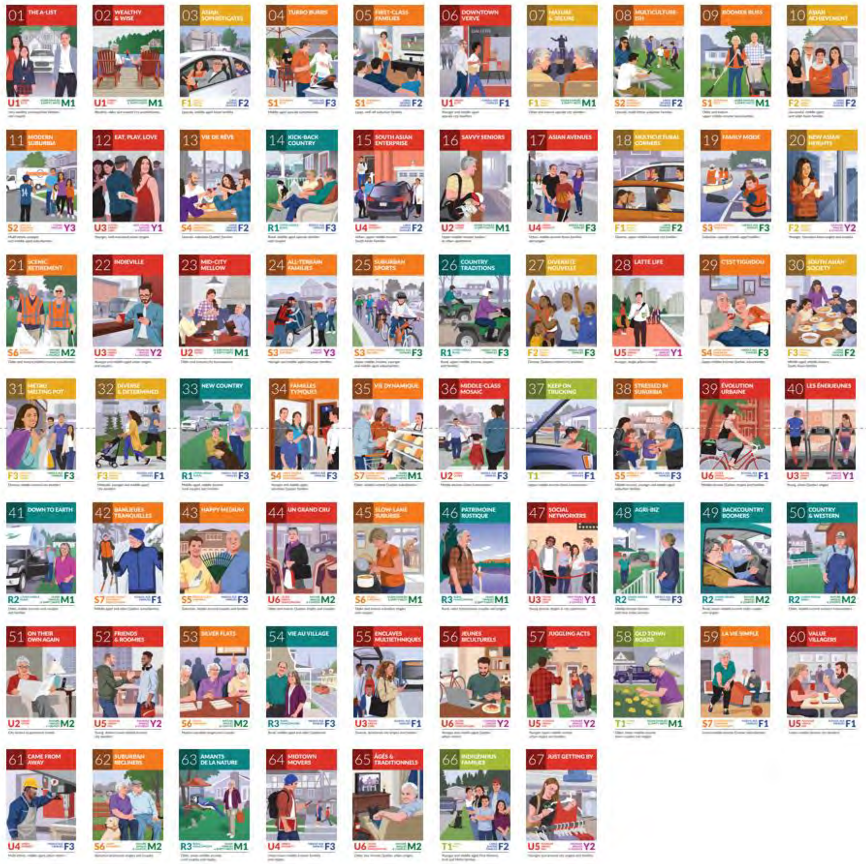
PRIZM: A Lifestage Segmentation Perspective





PRIZM Overview

The PRIZM segmentation system classifies Canada's neighbourhoods at a postal code-level into actionable, lifestyle segments.



PRIZM

Look up your segment!
https://prizm.environicsanalytics.com/

PRIZM Captures:

- Aging population
- Increased cultural diversity
- More urban lifestyles; Emerging urban Fringe
- Emergence of Millennial lifestyles
- Evolving household types
- M4W 3H1 Uniqueness of each 6-digit postal code

- Best in class methodologies and multiple recent data sources combine for a granular view that confirms the big picture from the ground up
- Assigns neighborhoods to a lifestyle segment at a postal code level based on demographics, psychographics, and other behaviours

Source: PRIZM 2020

ENVIRONICS
ANALYTICS

Understanding PRIZM Segment Descriptions

The PRIZM segment of a customer or prospect can provide a wealth of information about them.

SESI (the lower the SESI number, the greater the affluence)

- Income & Education
- Low-Income Indicator
- Dwelling Value
- Net Worth
- Discretionary Income
- Household Size

Social Group (the lower the social group number, the greater the affluence)

New! 20 Social Groups

Urban	U1 – U6
Urban Fringe	F1 – F3
Suburban	S1 – S7
Town	T1
Rural	R1 - R3

Driven by:

- Urbanity
- Affluence
- Age
- Ethnicity
- Dwelling Type

Younger, well-educated urban singles

Segment Name

Segment Icon

Lifestage Group (the higher the Lifestage Group Number, the further the segment is along in their life stage)

8 Lifestage Groups

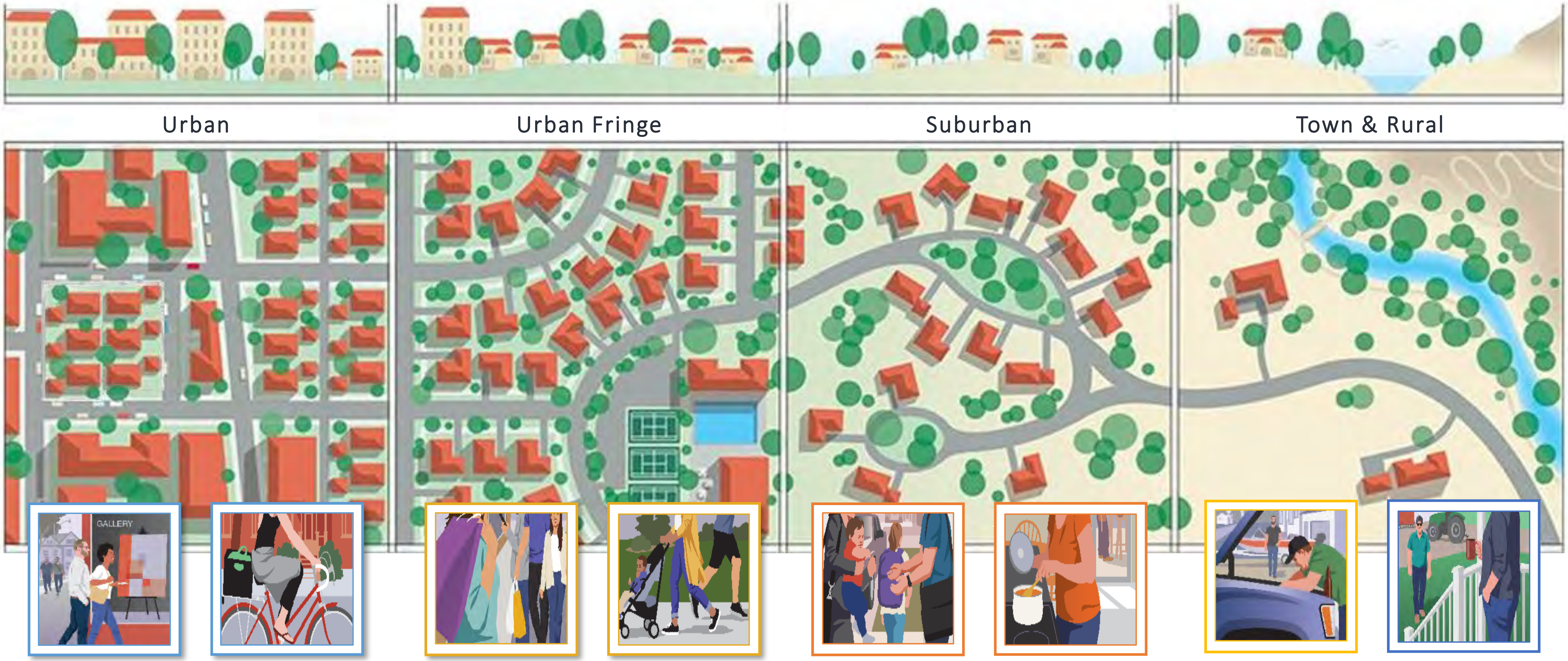
Youth	Y1 – Y3
Families	F1 – F3
Mature	M1 – M2

Influenced by:

- Singles
- Families
- Age of Children
- Age of Maintainer
- Affluence
- Language
- Urbanity

Source: PRIZM 2020

Urbanity



Integrated: For activation

TV and Radio
- Bell Media
- Corus
- Finecast
- Rogers

Out of Home
- Kinetic
- Pattison
- Vistar

Digital, Mobile and Social
- Bell Media
- Connected Interactive
- MiQ
- Rogers

Print Media
- TorStar
- Globe & Mail
- Post Media
- Yellow Pages

Consultants
- BCG
- Buxton
- Deloitte

Market Research
- AskingCanadians
- Dynata
- Environics Research
- Maru/Blue
- Numeris
- Vividata

Email Marketing
- Bell Media
- Epsilon
- Inbox Marketer

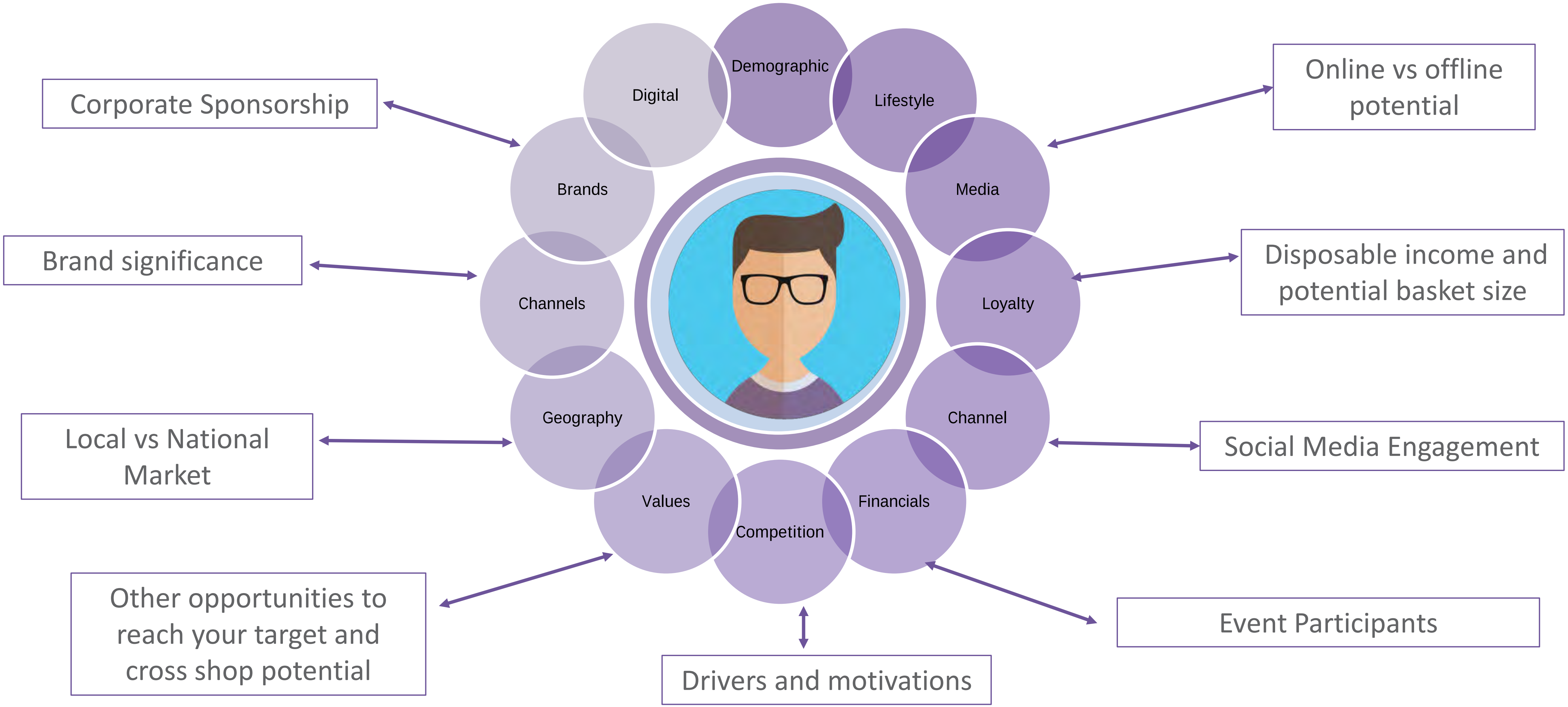
Direct Marketing
- Canada Post
- Cleanlist
- D&B
- InfoGroup

Media Planning
- Clear Decisions
- GroupM
- Omnicom
- Telmar

Translating data insights into action

Taking a deeper dive into data driven partnerships

To build a strategy, it would help to know…



Corporate Sponsorship

Online vs offline potential

Brand significance

Disposable income and potential basket size

Local vs National Market

Social Media Engagement

Other opportunities to reach your target and cross shop potential

Event Participants

Drivers and motivations

Our goal is to give our clients a 360 view of your constituents

How to get started

Understand your Audience through segmentation

+

Demographic

Psychographic

Behavioural

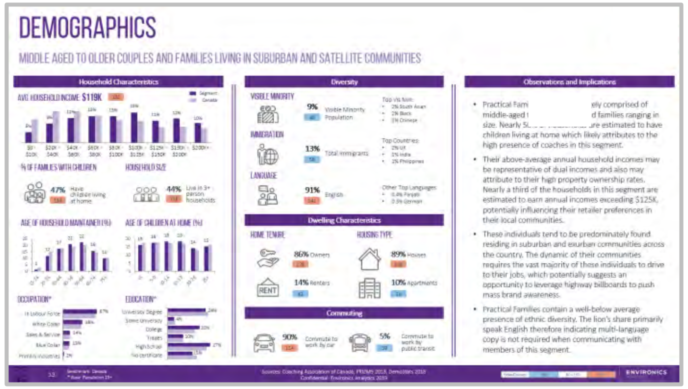
Financial

Client data

BABY BOOMERS

GENERATION Y AND X

MILLENNIALS

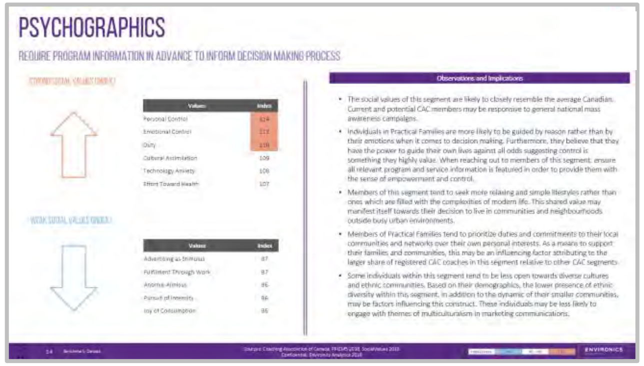


DEMOGRAPHICS

MIDDLE AGED TO OLDER COUPLES AND FAMILIES LIVING IN SUBURBAN AND SATELLITE COMMUNITIES

Observations and Implications

- Practical Fami [redacted] ely comprised of middle-aged t d families ranging in size. Nearly 5 re estimated to have children living at home which likely attributes to the high presence of coaches in this segment.
- Their above-average annual household incomes may be representative of dual incomes and also may attribute to their high property ownership rates. Nearly a third of the households in this segment are estimated to earn annual incomes exceeding $125K, potentially influencing their retailer preferences in their local communities.
- These individuals tend to be predominately found residing in suburban and exurban communities across the country. The dynamic of their communities requires the vast majority of these individuals to drive to their jobs, which potentially suggests an opportunity to leverage highway billboards to push mass brand awareness.
- Practical Families contain a well-below average presence of ethnic diversity. The lion's share primarily speak English therefore indicating multi-language copy is not required when communicating with members of this segment.



PSYCHOGRAPHICS

REQUIRE PROGRAM INFORMATION IN ADVANCE TO INFORM DECISION MAKING PROCESS

Values	Index
Personal Control	124
Emotional Control	112
Duty	110
Cultural Assimilation	109
Technology Anxiety	108
Effort Toward Health	107

Values	Index
Advertising as Stimulus	87
Fulfilment Through Work	87
Anomie-Aimless	86
Pursuit of Intensity	86
Joy of Consumption	85

Observations and Implications

- The social values of this segment are likely to closely resemble the average Canadian. Current and potential CAC members may be responsive to general national mass awareness campaigns.
- Individuals in Practical Families are more likely to be guided by reason rather than by their emotions when it comes to decision making. Furthermore, they believe that they have the power to guide their own lives against all odds suggesting control is something they highly value. When reaching out to members of this segment, ensure all relevant program and service information is featured in order to provide them with the sense of empowerment and control.
- Members of this segment tend to seek more relaxing and simple lifestyles rather than ones which are filled with the complexities of modern life. This shared value may manifest itself towards their decision to live in communities and neighbourhoods outside busy urban environments.
- Members of Practical Families tend to prioritize duties and commitments to their local communities and networks over their own personal interests. As a means to support their families and communities, this may be an influencing factor attributing to the larger share of registered CAC coaches in this segment relative to other CAC segments.
- Some individuals within this segment tend to be less open towards diverse cultures and ethnic communities. Based on their demographics, the lower presence of ethnic diversity within this segment, in addition to the dynamic of their smaller communities, may be factors influencing this construct. These individuals may be less likely to engage with themes of multiculturalism in marketing communications.

- Audience segments, both developed and potential, are created from clustering of PRIZM segments based on similarities in program behaviours, demographics and psychographics.

- Additional data is overlaid onto constituent segments and interpreted.

- Actionable Target Groups

- Detailed view into core groups
- Actionable insights and observations generated in this phase.

Baby Boomers

Demographics

AVG. HOUSEHOLD INCOME: **$254K** 248

VISIBLE MINORITY POP.	TOTAL IMMIGRANTS	ENGLISH ONLY
22% 86	26% 113	77% 112

Top Vis Min:
- 7% Chinese
- 5% South Asian
- 2% Black

HAVE INTERNET ACCESS

91% 104

Other Top Languages:
- 3% Mandarin
- 2% Cantonese
- 2% Italian

HOUSEHOLDS WITH CHILDREN

51% 119 Have children living at home

HOUSEHOLD SIZE

11% 127 Live in 5+ person households

OCCUPATION CATEGORY

Management 159

HIGHEST EDUCATION LEVEL

University Degree 191

SocialValues

BRAND APATHY	96	IMPORTANCE OF BRAND	94
CONFIDENCE IN BIG BUSINESS	88	JOY OF CONSUMPTION	91
SKEPTICISM TOWARDS ADVERTISING	109	CONFIDENCE IN ADVERTISING	91
PERSONAL OPTIMISM	89	EFFORT TOWARDS HEALTH	112
SOCIAL RESPONSIBILITY	99	OBEDIENCE TO AUTHORITY	109
PURSUIT OF INTENSITY	85	PURSUIT OF NOVELTY	85

Brands & Consumption

TOP DEALERSHIPS	%	Index
Toyota/Lexus	10.2	110
Honda	8.4	100
Buick/Cadillac/Chevrolet/GMC	8.4	99

TOP BANKS	%	Index
TD Canada Trust	19.6	134
RBC Royal Bank	16.8	102
CIBC	11.1	115

RESTAURANTS	%	Index
Tim Horton's	64.1	99
McDonald's	50.6	93
Swiss Chalet	32.6	124

TECHNOLOGY	%	Index
Best Buy	48.8	115
Staples	39.8	108

Average Per Household Clothing Expenditure
$8,487
246

Average Per Household Recreation Expenditure
$12,230
257

Average Per Household Transportation Expenditure
$29,276
204

Media

INTERNET

213 Minutes/Day
100

Top Activities:
- Sports Content
- Restaurant Guides
- Real Estate Listings

DIRECT/OUTDOOR

11 Minutes/Day
96

Top DM Formats:
- Flyers
- Info from Websites
- Local Store Catalogues

MAGAZINE

11 Minutes/Day
120

Genres:
- Business & Finance
- News
- Gardening

TV

174 Minutes/Day
93

Top Programs:
- Basketball
- Soccer
- Curling

NEWSPAPER

1.5 Hours/Week
130

Top Sections Read:
- New Homes
- Business
- Travel

RADIO

14 Hours/Week
95

Top Formats:
- Classical/Fine Arts
- All News
- Modern/Alternative Rock

FACEBOOK	73 %	92	YOUTUBE	71 %	103
TWITTER	30 %	112	SNAPCHAT	11 %	82
INSTAGRAM	35 %	106	WHATSAPP	37 %	122
LINKEDIN	54 %	129	BLOGS	17 %	131

Index Colours:	<80	80 - 110	110+

Gen X & Y

Demographics

AVG. HOUSEHOLD INCOME: **$93K** 91

VISIBLE MINORITY POP.	TOTAL IMMIGRANTS	ENGLISH ONLY
17%	23%	83%
67	102	121

Top Vis Min:
- 4% South Asian
- 3% Chinese
- 3% Black

HAVE INTERNET ACCESS

87% 99

Other Top Languages:
- 2% German
- 1% Arabic
- 1% Mandarin

HOUSEHOLDS WITH CHILDREN

23% 58 Have children living at home

HOUSEHOLD SIZE

4% 42 Live in 5+ person households

OCCUPATION CATEGORY

Management 85

HIGHEST EDUCATION LEVEL

University Degree 110

SocialValues

BRAND APATHY	88	IMPORTANCE OF BRAND	107
CONFIDENCE IN BIG BUSINESS	96	JOY OF CONSUMPTION	79
SKEPTICISM TOWARDS ADVERTISING	111	CONFIDENCE IN ADVERTISING	88
PERSONAL OPTIMISM	97	EFFORT TOWARDS HEALTH	123
SOCIAL RESPONSIBILITY	105	OBEDIENCE TO AUTHORITY	83
PURSUIT OF INTENSITY	81	PURSUIT OF NOVELTY	79

Brands & Consumption

TOP DEALERSHIPS	%	Index
Toyota/Lexus	8.9	96
Honda	8.3	98
Buick/Cadillac/Chevrolet/GMC	7.8	91

TOP BANKS	%	Index
RBC Royal Bank	18.2	110
TD Canada Trust	17.1	117
CIBC	11.1	114

RESTAURANTS	%	Index
Tim Horton's	64.9	100
McDonald's	49.6	92
A&W	33.9	107

TECHNOLOGY	%	Index
Best Buy	41.8	98
Staples	39.6	108

Average Per Household Clothing Expenditure	Average Per Household Recreation Expenditure	Average Per Household Transportation Expenditure
$3,020	$4,179	$12,115
87	88	84

Media

INTERNET

202 Minutes/Day 95

Top Activities:
- Use Discount Coupons
- Real Estate Listings
- Restaurant Guides/Reviews

DIRECT/OUTDOOR

9 Minutes/Day 79

Top DM Formats:
- Newspaper Flyers
- Yellow Pages

MAGAZINE

12 Minutes/Day 138

Genres:
- Senior Citizens
- News
- Women's

TV

207 Minutes/Day 111

Top Programs:
- Figure Skating
- Golf
- Curling

NEWSPAPER

1.8 Hours/Week 158

Top Sections Read:
- Classifieds
- New Homes
- Editorials

RADIO

15 Hours/Week 102

Top Formats:
- Today's Country
- Adult Contemporary

FACEBOOK	78 %	98	YOUTUBE	67 %	98
TWITTER	26 %	95	SNAPCHAT	11 %	79
INSTAGRAM	32 %	96	WHATSAPP	27 %	88
LINKEDIN	40 %	96	BLOGS	13 %	99

Area: Canada

Index Colours: <80 | 80 - 110 | 110+

ENVIRONICS ANALYTICS

Millennials

Demographics

AVG. HOUSEHOLD INCOME: **$89K** 87

VISIBLE MINORITY POP. 35% 137

TOTAL IMMIGRANTS 29% 127

ENGLISH ONLY 77% 111

Top Vis Min:
- 9% Chinese
- 6% South Asian
- 5% Black

HAVE INTERNET ACCESS 90% 103

Other Top Languages:
- 4% Mandarin
- 2% Spanish
- 2% Cantonese

HOUSEHOLDS WITH CHILDREN 18% 45 Have children living at home

HOUSEHOLD SIZE 3% 29 Live in 5+ person households

OCCUPATION CATEGORY Management 124

HIGHEST EDUCATION LEVEL University Degree 191

SocialValues

BRAND APATHY	99	IMPORTANCE OF BRAND	110
CONFIDENCE IN BIG BUSINESS	85	JOY OF CONSUMPTION	103
SKEPTICISM TOWARDS ADVERTISING	117	CONFIDENCE IN ADVERTISING	97
PERSONAL OPTIMISM	114	EFFORT TOWARD HEALTH	111
SOCIAL RESPONSIBILITY	96	OBEDIENCE TO AUTHORITY	72
PURSUIT OF INTENSITY	113	PURSUIT OF NOVELTY	117

Brands & Consumption

TOP DEALERSHIPS	%	Index
Toyota/Lexus	9.0	97
Honda	7.1	84
Hyundai	6.3	108

TOP BANKS	%	Index
TD Canada Trust	18.7	128
RBC Royal Bank	16.2	98
CIBC	11.7	121

RESTAURANTS	%	Index
Tim Hortons	59.4	92
McDonald’s	49.3	91
Starbuck	35.7	140

TECHNOLOGY	%	Index
Best Buy	43.4	102
Staples	37.0	101

Average Per Household Clothing Expenditure $3,113 90

Average Per Household Recreation Expenditure $3,676 77

Average Per Household Transportation Expenditure $8,910 62

Media

INTERNET 244 Minutes/Day 115

Top Activities:
- Listen to a Podcast
- Restaurant Guides/Reviews
- Read Online Newspapers

DIRECT/OUTDOOR 11 Minutes/Day 92

Top DM Formats:
- Info from Websites
- Direct Email Offers
- Coupons

MAGAZINE 9 Minutes/Day 98

Genres:
- Alternative weekly
- News
- Business & Finance

TV 178 Minutes/Day 95

Top Programs:
- Basketball
- Sci-Fi/Fantasy
- Cartoons

NEWSPAPER 1.5 Hours/Week 135

Top Sections Read:
- Technology
- Business
- Editorials

RADIO 12 Hours/Week 83

Top Formats:
- Modern/Alt Rock
- Multi/Variety
- News/Talk

FACEBOOK	80 %	100	YOUTUBE	76 %	110
TWITTER	36 %	132	SNAPCHAT	16 %	112
INSTAGRAM	44 %	134	WHATSAPP	47 %	154
LINKEDIN	55 %	133	BLOGS	18 %	143

Index Colours:	<80	80 - 110	110+

Takeaways

Takeaways

- Due to ongoing economic impact of this pandemic across all business industry sectors, organizations are continually searching to find new and innovative ways to engage and retain customers and help their brands stand out from the ever-growing noise in the market and communities they serve.

- Drive your business and partnerships forward using data, numbers and facts. Now is not the time for "gut feel".

- Now, more than ever before, there is an abundance of data being collected by and shared on and about the general population. Ensure you have the right systems and partners in place to best utilize this data and integrate it into your decision- making process.

- Customers values don't change, the manner with which you engage them do!

- When engaging with your partners, ensure that you drive the relationship by providing valuable data on who your audience is, what the market potential is for their brand and offering and use data driven strategies to optimize your engagement and create the greatest ROI for everyone.

QUESTIONS