

## Nike And Barclays Are Most Associated With Grass Roots Sport

New research from SMG Insight into the relationship between brands and the grass roots development of sport will make mixed reading for sponsors of the London 2012 Olympics.

While Olympic sponsors Adidas, Coca-Cola and McDonald's all saw increased awareness of their activities in the three months surrounding London 2012, the two brands most associated with supporting grass roots sport were Nike and Barclays.

Across the period April to November 2012, Nike topped the SMG Insight poll (monthly survey, Apr-Nov number of respondents=10553) at 25.8% average awareness, peaking at 31% in July. Barclays came second with 22% - but stayed within a range of 21-24% across the entire period of the survey.

The next best performer was Adidas, which recorded an average of 20.9% across the survey period but peaked at 26% in August. Coca-Cola and McDonald's also peaked in August.

Perhaps the most interesting aspect of the table is the huge drop off that comes after McDonald's – with Aviva in sixth position recording awareness at about half the level of McDonald's. One possible conclusion from this is that it was not the Olympics that boosted recognition of grass roots activities but pre-existing relationships with soccer. It's no coincidence, for example, that McDonald's, Adidas and Coca-Cola were also global partners of Euro 2012 – while Nike and Barclays are long-term and heavily committed soccer sponsors.

Support for this thesis comes from two aspects of the survey. Firstly, the number of football-related brands in the top 20 (Mars, Lucozade, Carlsberg, Sky and Umbro, for example). Secondly, and more interestingly, the fact that big-spending

Olympic sponsor Lloyds TSB appears so low in the rankings – with just 4.7% average awareness across the period. While Lloyds TSB will measure the success of its investment across a range of areas, the fact that its grass roots awareness score only started to rise after the London 2012 Games was over will be a cause for concern. In July, for example, Lloyds TSB (4%) was scoring no higher than rival brands like Nationwide (4%).

One area where Olympic-related sponsorship did seem to have an impact was Sainsbury's support for the Paralympic Games, which it carried through into a commercial partnership with broadcaster Channel 4. The impact, which was also evident in Sainsbury's sales figures, is apparent in the September spike of 6% - compared to a usual score of 1-2% (see table). If there's a downside it's that there was an immediate fall off in October, suggesting that TV exposure is a key driver in recognition.

As for other insights revealed by the survey, it's worth noting that recognition of O2's commitment to grass roots sports development has risen from 3% to 10% across the period, suggesting that some aspect of its England Rugby Sponsorship is firing on all cylinders at the moment.

Frank Saez, Managing Director of SMG Insight commented: "These figures show the significant opportunities available to Olympic sponsors to promote their grass roots activity – albeit the most successful ones were those who used their Olympic sponsorship to complement an already strong portfolio of sporting activities."

For more information, please visit [www.smg-insight.com](http://www.smg-insight.com)

**Top 30 brands associated with the grass root development of sport (April-November 2012, highlighted brands are London 2012 Olympic sponsors)**

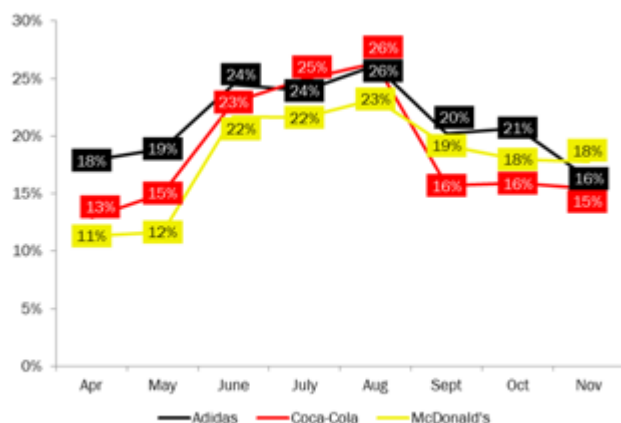
Q1) Now, thinking about the many brands (sponsors) associated with sport we would like you to provide the name of up to 3 brands who are, in your opinion, the most recognized as supporting the Grass Roots Development of sport. [open-ended]

|        |                        |       | Apr  | May  | June | July | Aug  |
|--------|------------------------|-------|------|------|------|------|------|
|        |                        |       | 1376 | 1570 | 1272 | 1199 | 1193 |
| BASES: |                        |       | 23%  | 21%  | 29%  | 31%  | 30%  |
| 1      | Nike                   | 25.8% | 23%  | 22%  | 21%  | 22%  | 22%  |
| 2      | Barclays               | 22.0% | 18%  | 19%  | 24%  | 24%  | 26%  |
| 3      | Adidas                 | 20.9% | 13%  | 15%  | 23%  | 25%  | 26%  |
| 4      | Coca-Cola              | 18.4% | 11%  | 12%  | 22%  | 22%  | 23%  |
| 5      | McDonald's             | 17.8% | 11%  | 9%   | 7%   | 7%   | 7%   |
| 6      | Aviva                  | 9.3%  | 12%  | 11%  | 6%   | 6%   | 4%   |
| 7      | Royal Bank of Scotland | 7.8%  | 3%   | 3%   | 6%   | 5%   | 6%   |
| 8      | O2                     | 6.1%  | 5%   | 4%   | 8%   | 7%   | 5%   |
| 9      | Lucozade               | 6.1%  | 4%   | 4%   | 8%   | 7%   | 6%   |
| 10     | Mars                   | 5.7%  | 3%   | 3%   | 3%   | 4%   | 4%   |
| 11     | Lloyds TSB             | 4.7%  | 6%   | 5%   | 4%   | 4%   | 3%   |
| 12     | Nationwide             | 4.3%  | 4%   | 5%   | 3%   | 4%   | 2%   |
| 13     | NatWest                | 3.5%  | 2%   | 2%   | 3%   | 5%   | 3%   |
| 14     | Carlsberg              | 3.4%  | 2%   | 2%   | 4%   | 3%   | 4%   |
| 15     | Sky                    | 3.3%  | 6%   | 5%   | 1%   | 1%   | 2%   |
| 16     | Carling                | 3.2%  | 1%   | 2%   | 3%   | 3%   | 2%   |
| 17     | Guinness               | 3.0%  | 2%   | 2%   | 4%   | 4%   | 3%   |
| 18     | Umbro                  | 2.9%  | 2%   | 2%   | 4%   | 4%   | 3%   |
| 19     | Tesco                  | 2.7%  | 2%   | 2%   | 4%   | 4%   | 3%   |
| 20     | Vodafone               | 2.6%  | 4%   | 5%   | 1%   | 2%   | 1%   |
| 21     | Sainsbury's            | 2.5%  | 2%   | 2%   | 2%   | 1%   | 2%   |
| 22     | National Lottery       | 2.3%  | 1%   | 1%   | 2%   | 2%   | 4%   |
| 23     | Santander              | 2.3%  | 4%   | 4%   | 1%   | 1%   | 1%   |
| 24     | Reebok                 | 2.2%  | 3%   | 3%   | 2%   | 2%   | 2%   |
| 25     | British Gas            | 2.1%  | 3%   | 3%   | 2%   | 3%   | 2%   |
| 26     | Red Bull               | 2.1%  | 3%   | 4%   | 2%   | 1%   | 0%   |
| 27     | Visa                   | 1.7%  | 2%   | 2%   | 2%   | 1%   | 2%   |
| 28     | BT                     | 1.3%  | 1%   | 1%   | 1%   | 0%   | 1%   |
| 29     | EDF Energy             | 1.0%  | 1%   | 1%   | 1%   | 1%   | 1%   |
| 30     | Samsung                | 1.0%  | 1%   | 1%   | 0%   | 0%   | 1%   |

Note:

The other London 2012 Olympic sponsors which were not mentioned in the Top 30 brands associated with grassroot sport development were Acer, Atos, BMW, BP, British Airways, Dow, GE, Omega, Panasonic and P&G.

**Top 3 London 2012 Olympic sponsors linked with grass root development of sport (Apr-Nov 2012)**



**Top 10 sports linked with sponsors in grass root development (April-November 2012)**

Q2) You identified <<sponsor>> as a brand you associate with the development of sport at a grass roots level. Which sports in particular do you most associate <<sponsor>> with the development of? (Please select all that apply) [open-ended]

|    |              |       |
|----|--------------|-------|
| 1  | Football     | 66%   |
| 2  | Athletics    | 39%   |
| 3  | Rugby Union  | 21%   |
| 4  | Tennis       | 18%   |
| 5  | Swimming     | 10%   |
| 6  | Rugby League | 10%   |
| 7  | Cricket      | 10%   |
| 8  | Basketball   | 9%    |
| 9  | Cycling      | 9%    |
| 10 | Gymnastics   | 7%    |
|    | BASE         | 10553 |