

The Shirt Sponsorship League 2015



How brands engage with fans through their football shirt sponsorship deals

August 2015

Welcome to 'The Sponsorship League' Report

An estimated £200m a year is currently being paid by various brands to sponsor the shirts of the 20 Premier League clubs for a single season. That's roughly 10 times what the 24 Championship clubs receive from their shirt sponsors in a year.

It's good business for the clubs – particularly those in the top flight – but is it good business for the companies putting their brands on the shirts?

For many of those sponsors – such as Emirates, Etihad Airways, American Express, Air Asia and King Power – the shirt sponsorship is part of a much wider sponsorship deal with the club or is directly linked to the club's ownership. In other words, the logo on the shirts is just part of the package.

From a marketing perspective, the 'brand awareness' benefits are obvious. The Premier League says its matches reach more than 200 territories around the world and are watched in around 650 million homes. Then there's the Champions League, Europa League, FA Cup and League Cup viewing figures to add into that. And we haven't even counted the 360,000 who actually go to Premier League games every week.

The figures for the Football League Championship are rather more modest. The average live game attracts around 400,000 Sky Sports viewers, with around 1 million tuning into the BBC's weekly highlights show (Channel 5 recently won the rights for those). More than 20 countries around the world show either live Championship games or highlights.

But is that awareness enough to justify the investment?

Awareness vs Engagement

Football is one of the world's most brand-saturated markets.

In addition to the main shirt sponsors, there are often secondary sponsors on the backs of the shirts. Then there's the clubs' other commercial partners, who appear on the TV interview backdrops alongside the competition's commercial partners. On top that, there's all the brands shelling out for perimeter advertising in the stadia, plus the brands advertising during the commercial breaks (or as part of the TV company's own sponsor packages). And so it goes on... and on.

Brands want more than awareness. They want loyalty and advocacy from their existing customers, and they want to open up channels to new customers for their products and services. To do both, they need to communicate their brand values and personality.

But it's the same for the fans. They want the brands sponsoring their clubs – or football in general – to share their passion, to give something back, and to build a relationship with the fans. They need to understand, and have an affinity with, the brand's values.

In football, as with any sport, for the sponsorship to work effectively consumers need to know more than the brand's name. They need to understand how and why the brand fits into their lives. That applies whether it's a local, national or global brand.

That's why relying on advertising to leverage the sponsorship is both passive and unproductive.

Our research

So we set out to discover which brands have been prepared to put more effort into engaging with their audience through the shirt sponsorship, and which brands have tended to rely on football's own marketing to generate simple brand awareness.

We looked at the information available publicly on the sponsorship activation programmes of every main shirt sponsor in both the Premier League and Football League Championship over the past three seasons.

We considered how (if at all) each brand communicated with fans throughout the sponsorship term – through events, promotions, offers, community programmes and CSR.

We also assessed how effectively each sponsor had used the media (including social media) to communicate its brand values and sponsorship objectives to the fans, and how the sponsorship was used to help generate new customers and drive customer loyalty.

In measuring the overall effectiveness of the sponsorship, we took into account the brand's profile and the length – and extent – of its commercial relationship with the football club.

We excluded any sponsorship activities that could not be directly attributed to the shirt sponsorship.

Our start-point was the 20 clubs competing in the 2015-16 Premier League season, and the 24 clubs in the 2015-16 Football League Championship. To be included in the report, the sponsor had to have been involved with the club for at least 12 months.

Where the shirt sponsorship deal covered only the 2014-15 season (and there is a new sponsor for the forthcoming season), we also researched the sponsors for the 2013-14 and 2012-13 seasons.

Where the sponsorship covered the 2014-15 and 2013-14 seasons, no other sponsor's activities for that club were taken into account.

For any sponsor whose relationship with the club extends beyond those two years, we have indicated the length of that sponsorship.

What the scores mean

Based on the research, scores (out of 10) have been allocated to each club's sponsor(s). Where more than one brand is represented per club, the score is based on the combined sponsorship performance of those brands.

8.0 and above	A very active sponsor demonstrating strong and consistent engagement with fans
6.0 – 7.5	Clear evidence of an activation programme and some engagement success
5.0 – 5.5	Largely reliant on awareness via the shirt presence
Below 5.0	Little or no evidence of any audience engagement

The Sponsorship League – Results

Premier League

The Champions

Veho (Southampton, since 2014) 9 out of 10

Electricals company Veho certainly doesn't fall into the category of lazy sponsor. It's based in Southampton, and boss Steve Lewis is a lifelong Saints fan who tweets about the club a lot.

In theory that's an ideal match, and Veho hasn't been slow to take advantage of the opportunity to engage with Saints fans, from competitions to win tickets and the chance to experience a PL game from a swish corporate box, to a hunt to find matchballs hidden around the county that proved extremely popular with fans. It has also run an offer for anyone buying a Veho product, with chance to win an invite to an exclusive event at St Mary's.

Veho has also organised charity matches at St Mary's and zorbing relay races on the pitch, and given local kids a football experience via the club's Academy.

Despite all that, some fans think the club should be more global in its outlook and attract a bigger sponsor. Be careful what you wish for.

The Rest

Aviva (Norwich City, since 2008) 8.5

Aviva (formerly Norwich Union) is the biggest private sector employer in Norfolk, with some 6,000 staff. It's been the Canaries' shirt sponsor for the past seven years.

You name it, Aviva has done it: goal of the season competitions; fan of the year awards; fan events; local sports activities; videos for new kits with celeb fans such as Stephen Fry and ticket giveaways on social media. The company has also maintained a tradition of giving away a shirt sponsorship to a charity for one game a season.

No surprise, therefore, that it's pretty popular with fans.

Standard Chartered **(Liverpool, since 2013)** **8.0**

Standard Chartered doesn't have much of a presence in the UK, but does have significant business elsewhere – particularly in the Far East – so the link-up with Liverpool makes commercial sense.

What the bank hasn't done, however, is to allow the TV networks to do its marketing job. Instead, it's launched a series of initiatives with fans around the world, as well as charitable and community-based campaigns. Fans, players and club staff have supported Standard Chartered on issues such as preventable blindness (the 'Seeing is Believing' week included putting the campaign logo on players' shirts for the Tottenham game).

Around the world, Reds fans got the chance to watch their team via events in several city locations, with spot prizes of autographed merchandise, and also a 'fan of the month' competition. There was also a 'Tribute to the Captain' campaign to mark the departure of Steven Gerrard, with the chance for a fan to win a trip to Anfield for his final game.

Chang Beer **(Everton, since 2005)** **7.5**

Chang's 10-year sponsorship of the Toffees isn't surpassed in the Premier League.

It has engaged with fans through ticket giveaways on social media and promotions on packs of beer, but more creatively it produced an EFC artwork using 5,000 bottle tops.

Chang also launched a 'Live the Life' campaign to give supporters the opportunity to live the life of a Premier League footballer for a weekend. The 'money-can't-buy' prize included luxury travel, a stay in one of the city's top hotels, a chauffeur driven Audi and meeting the players at Everton's training ground, followed by VIP matchday hospitality.

Samsung **(Chelsea, 2005-2015)** **7.5**

The Chelsea sponsorship helped Samsung become a truly global brand (in three years it built up a 30% share of the European flat screen TV market) with a more premium positioning, but the electronics giant didn't rely on the club's worldwide pull.

It ran a number of grassroots and CSR initiatives, including a 'Dream The Blues' campaign in 2013 that gave kids around the world the chance to be coached by Chelsea Foundation coaches, and youth football camps that attracted more than 5,000 youngsters.

Samsung also launched a Chelsea app with lots of club content, plus CFC-branded cameras. They also had ambassadors at games, giving away free team posters and generally keeping the brand as close as possible to the fans.

Neteller & GAC**(Crystal Palace, 2005-15) 6.5**

US-based Neteller (a finance company, not a nutty chocolate spread) signed a two-year deal with Palace in 2014, but a year on it's been replaced by Mansion.

Neteller actually did quite a lot to promote the investment, with competitions to win VIP experiences at Selhurst Park, and lunch with manager Alan Pardew. The brand was also very active on social media, with ticket giveaways being unsurprisingly popular. More controversially, Palace allowed Neteller to announce the news that Neil Warnock had replaced Tony Pulis as manager.

GAC, a logistics company, was sponsor for nine years but was less visible. Its biggest engagement was donating its shirt space to the UN's World Food Programme. GAC has also been involved with many other sports, including golf, sailing and American Football.

Chevrolet**(Manchester Utd, 2014-) 6.0**

It's not been the best of relationships between football club, fans and sponsor. Last year, for instance, Chevy provided 15 cars for the players' use at the Carrington training complex, but players reportedly refused to drive them (they do now, apparently, following 'encouragement' from the club). On top of that, some fans took a dislike to the Chevrolet logo on the 2014-15 kit.

United give Chevrolet a global reach, and that's reflected in much of the sponsorship activation work. The chevroletfc.com site – “bringing play to the world” – isn't specific to Manchester United, as the brand also sponsors the US women's team.

But it's used United stars to talk about the “impact of play”, their sporting heroes etc. It also runs #askmanutd Q&A sessions on social media, and in 2013 auctioned a car signed by the players to raise money for the Manchester United Foundation.

King Power**(Leicester City, 2010-) 5.5**

It's a familiar scenario. Billionaire buys club. Billionaire renames stadium after his company. Billionaire puts his company logo on the shirts.

King Power is Thailand's biggest travel group, although few outside the Far East (and Leicestershire) probably know that. But boss Vichai Srivaddhanaprabha has done a better job of engaging with fans than many other owners in the Premier League.

The most popular move was giving a free pint to every fan to celebrate City avoiding relegation, but King Power has also organised initiatives such as the chance for fans to play a match on the pitch.

AIA and Spurs established a series of junior training programmes in key Asian markets, with club coaches working with underprivileged children to further develop their interest and participation in football. AIA also supports a youth football development programme in China, and Spurs players promoted it by wearing specially-designed shirts in a league game last season.

Bet365

(Stoke City, 2012-)

5.0

The Potters are now inextricably linked with Bet365, the Stoke-based online bookie run by club owner Peter Coates and his wife.

So it's impossible to look at Bet365 simply as a shirt sponsor, or to separate Coates the owner from Coates the local multi-millionaire businessman. The Bet365 Foundation is certainly active in the area, supporting a lot of causes, but you suspect they'd be doing that even if they weren't club sponsors. Still, Coates is well-liked by Stoke fans these days, so perhaps they're doing enough?

Sports Interactive

(Watford, 2012-15)

5.0

SI used its sponsorship deal with Watford to promote its Football Manager game, with the company freely admitting that the exposure was about building the brand internationally, rather than engagement specifically with Hornets fans.

As a result, it was a fairly low-key relationship between sponsor and supporters, although Watford fans did like the fact they knew the brand and could at least see the fit.

Bidvest 3663

(Sunderland, 2013-2015)

4.5

The South-Africa based foodservice company has more than 100,000 employees across four continents, so building a greater foothold on Wearside was never going to be top of its list of sponsorship priorities.

Bidvest used its Sunderland links to organise coaching sessions for kids in South Africa, while a teenage player from the company-supported Bidvest Wits under-17s in South Africa was invited to the Stadium of Light to train with the Premier League club. The deal gave Sunderland a greater presence on the African continent, but it still strikes as an unnatural tie-up.

Alpari (West Ham Utd, 2013-15) 3.5

It's not that they didn't try, but linking a foreign exchange (FX) broker with hardcore Hammers fans was never going to be easy. For example, Alpari created a 'Get in the game' video to promote the 2014-15 kit launch that tried to show the links between scoring a Premier League goal and making a deal on the FX markets, and offered free ebooks to West Ham fans showing how they could make a fortune on FX.

Alpari UK went bust earlier this year, and the Hammers have now signed up with Betway.

Energy Consulting (Bournemouth, 2012-15) 3.5

The boss of Energy Consulting is said to be a close friend of the club's Russian owner, Maxim Demin.

EC had been involved in AFC Bournemouth for some time prior to taking on the shirt sponsorship in 2012. They did, for example, fund a European pre-season tournament at Dean Court. It was also reported that in 2011 they tried to buy 50% of the club. But otherwise there was little activity to note, and now the Cherries are in the Premier League they've been replaced by Mansion Group.

GWFX (Swansea City, 2013-) 3.0

Another foreign exchange broker, Goldenway Global, has been the Swans' shirt sponsor for the past two years.

Its sponsorship activities have included a video of Swansea players practising Chinese to wish fans a happy 'Year of the Goat', and wearing Chinese New Year shirts for their game with Manchester United. GWFX has also been involved with the club's supporters' trust and has organised 'get to know us' events at the Liberty Stadium, but with some fans reckoning the logo is unreadable it's clear there is still work to do.

Dafabet (Aston Villa, 2013-15) 3.0

Dafabet has jumped ship to Sunderland and Blackburn Rovers, but for the past two seasons the betting brand was Villa's main shirt sponsor.

OK, being a bookie does restrict what sponsorship activities you can carry out, but Dafabet was clearly one of those sponsors happy to bask in the TV exposure – fan engagement was minimal.

Its cause wasn't helped last year when it inadvertently retweeted a spoof tweet from a fake Villa account offering best odds on Villa to be relegated.

Wonga

(Newcastle Utd, 2012-)

2.0

Is any shirt sponsor disliked by a club's fans more than Wonga? The backlash towards the payday lender has extended to Toon fans launching their own club shirt without the Wonga logo, and openly celebrating on social media the announcement of big losses by the lender.

The Supporters Trust even launched a scheme with local credit unions aimed at providing an alternative source of loans to firms like Wonga.

Wonga tried to smooth the waters last year by unveiling a mural featuring 2,000 images of fans from around the world cheering on the team, but then scored an own goal in May by unveiling a new logo – just hours before the club launched its new kit featuring the old Wonga branding.

Football League Championship

The Champions

Marathonbet

(Fulham, 2013-)

9.0

Just when you think online betting companies get into Premier League shirt sponsorship deals simply for the worldwide exposure, along comes Marathonbet.

The agreement started when Fulham were in the top flight, but – to the company's credit – has continued since relegation to the Championship. And the engagement with Fulham fans has been impressive.

Fans have been offered the usual "money-can't-buy" prizes, such as VIP matchday treatment, half-time challenges on the pitch and signed shirt giveaways, but Marathonbet has also been more creative in its activities. Two hundred fans got free travel to Sunderland (billed the 'Marathon Trip'), with a reveal of the new third-choice kit on the way and drinks served in a pub by Cottagers favourite Louis Boa Morte. And fans also got the chance to play at Craven Cottage as part of the Marathonbet Cup.

The Rest

Ramsdens (Middlesbrough, 2010-) **8.5**

The UK's largest independent pawnbroking chain has been a model shirt sponsor, using social media and experiential activities to build a strong relationship with Middlesbrough fans, and in doing so create a positive reputation with football fans in general.

Ramsdens set up an online video portal (Ramsdens.TV) to promote the sponsorship, and signed up Boro old boy Craig Hignett as an ambassador. It has run competitions to win shirts, footballs and other merchandise, and has also used signed shirts to raise money for local charities. Ramsdens is active on social media, even extending to Google+ hangouts with players.

Skyex  (Brentford, 2012-2015) **8.0**

Skyex – West London's largest cab and courier firm – clearly saw the Brentford deal as a way to strengthen its relationships in the local community, so the sponsorship activities were geared towards that. For a community-focused football club, it was a great fit.

Community events were held regularly at the club, and hundreds of match tickets were given to local kids and their families. Skyex also staged a charity game at Griffin Park and held a community day at the stadium to raise money for a West London charity.

What House (Wolves, 2013-15) **7.0**

Although a national brand, What House was prepared to invest in a fan engagement programme to promote its Wolves sponsorship.

Signing up former keeper Matt Murray as an ambassador was a shrewd move, and a competition for one Wolves fan to have their mortgage or rent paid for six months (by taking pics of their personal 'shrines' to the club) secured good exposure. The brand also did plenty of the usual array of half-time challenges, player of the month awards and signed merchandise, along with some good community engagement in the Wolverhampton area.

Air Asia (QPR, since 2012) **7.0**

It's been a tough year for Air Asia, but the company (run by Hoops owner Tony Fernandez) has maintained strong links with QPR.

From setting up coaching clinics for young players both in the UK and the Far East, to setting up selfie kiosks at Loftus Road and having cabin crew on the pitch with t-shirt cannons, Air Asia has been a very visible sponsor. Recently it was announced the Alzheimer's Society would be given the shirt sponsorship for an upcoming league game, after Rangers legend Stan Bowles was diagnosed with the disease.

RSG (Bristol City, 2014-) 6.0

Recruitment company Resource Solutions Group was reasonably active in the first season of its sponsorship, organising monthly golden ticket prizes, online competitions to guess the score, and lots of free tickets for staff.

RSG is also cementing its community links in the city via a sponsorship deal with the Bristol Flyers basketball team.

Parkgate Shopping Centre (Rotherham Utd, 2009-) 6.0

For a community-based club like the Millers, the association with the local shopping centre makes perfect sense.

Parkgate first sponsored the club back in the 1980s, when it first opened, and has been the main shirt sponsor for the past six years. The centre has given away VIP matchday packages to fans and has worked with the club on various community initiatives.

Zapaygo & Nicolites (Birmingham City, 2013-15) 5.5

Birmingham-based Zapaygo signed a two-year deal with the Blues in 2014 – taking over from Nicolites – but after one season the sponsorship has switched to long-term club supporters Eze Group.

Zapaygo ran a fan competition to win a new replica shirt delivered by a Brum player, and also hosted Q&A events with players. Fans who downloaded the Zapaygo payments app also had chance to win match tickets. E-ciggie brand Nicolites had the shirt deal the previous season, but did little to support it and some fans objected to the association.

Enterprise Insurance (Leeds United, 2011-15) 5.0

In keeping with the off-field shenanigans at Elland Road in recent years, Enterprise's four-year association with Leeds United as shirt sponsor has ended in acrimony, with a dispute over the contract and who's to blame.

Enterprise – whose boss, Leeds fan Andrew Flowers was involved in a failed consortium bid to buy the club – did at least promote the sponsorship through fan discounts, signed shirts and competitions for kids to win mascot places.

Virgin Trains (Preston NE, 2014-) **5.0**

For a brand as active and as creative as Virgin Trains, its two-year shirt deal with Preston has got off to a low-key (and not always positive) start.

Travel discounts for season tickets holders have gone down well with fans, but having to publicly apologise for a lack of trains for the Wembley play-off final in May was tough. But this new season following promotion gives Virgin Trains a bigger stage to play on.

Just Eat  (Derby County, 2014-) **4.5**

Just Eat, the online takeaway service, is about to kick off the second season of its three-year sponsorship deal with the Rams.

Hopefully the brand will build on a fairly quiet first season (discounts for fans and surprising fans at home with free meals being the ‘highlights’) with more creative activity to engage with fans – which might assuage those supporters who say they’re being mocked by rivals for the shirt logo.

American Express (Brighton & Hove Albion, 2013-) **4.5**

Amex has built strong community links (it’s the largest private sector employer in Brighton and Hove) through its sponsorship of the Seagulls.

The Amex Stadium is just four years old, and the financial services giant took on the shirt sponsorship in 2013. Its sponsorship activation work has focused on community events rather than engaging with football fans.

University of Greenwich (Charlton Athletic, 2014-) **4.5**

A good reason for a local business to agree to sponsoring its local football club is the opportunity to build its community credentials. With Charlton Athletic, it was the other way round.

The Addicks are near neighbours of the University of Greenwich, so the club thought a tie-in with the world of academia would help strengthen that community bond. Not surprisingly, therefore, the university’s been closely involved with the club’s community trust since the sponsorship began.

Waitrose (Reading, 2008-2015) 4.5

Waitrose was Reading's main shirt sponsor for seven years – which included one season in the Premier League, plus an FA Cup semi-final appearance – and will retain an involvement with the club by putting its logo on the back of players' shirts.

The fairly limited activation work included a Waitrose FanCam, capturing 360-degree images of fans at the Madejski Stadium, and special offers for season ticket holders.

Rekorderlig (Hudd'field Town, 2012-15) 4.0

The premium Swedish cider brand had three years as the Terriers' shirt sponsor, but their end-of-deal report would have to read "could have done better".

OK, offers, promotions and brand awareness activities are always tricky for alcohol brands, but Rekorderlig made very little impact on Town fans, and almost none on football generally. Which, after three years of sponsorship, is a real shame.

12Bet & Cash Converters (Hull City, 2011-15) 4.0

12Bet settled for awareness rather than engagement when it came to their sponsorship last season, when Hull were in the Premier League. They did produce a video to promote the sponsorship, but it had just a handful of views on YouTube. Oh, and referring to the club as the Hull City Tigers was never going to endear them to the fans.

The most high-profile activity Cash Converters did during their sponsorship was to involve the fans in the annual 'Movember' campaign, changing the kit sponsor for one game to 'Tash Converters'. Which, we have to admit, was cute.

Suzuki (MK Dons, since 2014) 4.0

Perhaps it's because being in League One didn't create many opportunities to drive home the brand messages, or maybe it's due to MK Dons not having the biggest following in the Football League, but Suzuki have made a fairly quiet entrance into football.

There were a few images posted on social media, and Suzuki also supported the club's Sports & Education Trust, but not much more. Perhaps a season in the Championship will give them more of an incentive.

Fawaz Refrigeration (Nott'ham Forest, 2013-15) 3.5

Fawaz Refrigeration is the company of club owner Fawaz Al Hasawi, who is something of a Marmite figure in Nottingham.

A few years ago he was lauded for 'saving' the club, but more recently he's been at the centre of rumours concerning naming rights at the stadium and plans to sell the club, which he's denied. That may explain why Fawaz Refrigeration is such a low-key sponsor.

Fibrlec (Bolton Wanderers, 2013-15) 3.5

Fibrlec, a local sustainable energy company, sponsored the Trotters for two seasons.

It was a very low-key sponsorship, with very little obvious activity apart from support for community match days. But the fans did at least seem to like last season's kit.

Fun88 & Premier Range (Burnley, 2012-15) 3.0

Asian gaming operator Fun88 introduced Burnley fans to the 'Fun88 Angels' (look them up if you don't believe us!), but otherwise they relied on the Premier League's TV rights to promote their sponsorship.

Online kitchen retailer Premier Range had the shirts deal for the previous two seasons, and its key activity was rewarding one fan per game with a VIP experience. There was also a video of then-boss Sean Dyche talking about the company, but that's best forgotten.

Zebra Claims, RFS & Probiz (Blackburn Rovers, 2012-15) 2.5

Rovers have changed shirt sponsor on a regular basis in the past few seasons, but none has been able to engage with fans successfully.

Zebra (a PPI claims business) launched its deal with a video featuring a well-known Rovers fan in the new kit, but the association with PPI claims led some fans to compare the sponsorship to that of Wonga's at Newcastle United.

Our conclusions

Almost a third (30%) of Premier League shirt sponsors and nearly half (46%) of Championship sponsors are demonstrating little or no audience engagement, and they include such well-known brands as American Express, Waitrose and Suzuki.

It's not surprising that the most active and engaged shirt sponsors – particularly in the Premier League – are those that have been involved with their clubs for a considerable length of time. They have built strong relationships not only with their clubs' fans but also with football fans in general, both in the UK and across the world.

Veho are an exception to that rule, having only sponsored Southampton since 2014, but they are the best-possible example of the benefits of a community-based sponsor: the opportunity to build an affinity with the club's fans and to create a strong relationship with the community.

Hot on the heels of Veho are Aviva, who have a long-term and successful relationship with Norwich City that has survived the club's relegations from, and promotions to, the Premier League. It would be hard to argue against the Norwich-based insurer being regarded as the perfect sponsor.

Our research also leads us to the conclusion that sponsoring one of the world's biggest football clubs does not necessarily mean a lazy sponsor.

While the likes of Chevrolet, AIA and GWFY may see their sponsorships of Manchester United, Tottenham and Swansea City respectively as global billboards, others are prepared to invest in marketing programmes to engage with fans.

Samsung's associations with Chelsea FC have helped it become one of the world's leading electronics brands, but Samsung has also been active – and creative – in how it has engaged with Chelsea's worldwide fanbase. Liverpool sponsor Standard Chartered has taken a similar approach.

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