

A large crowd of people is seated in a stadium, filling the background. In the foreground, a person wearing a white cap and a dark shirt is holding a flag. The word "NAVIGATE" is overlaid in large, bold, orange letters across the center of the image.

NAVIGATE



We are a trusted advisor in sports and entertainment. We use data and analytics to fuel insights and strategy.

The Industry Leader

Unparalleled experience + expertise

Primary and Secondary Research Storytelling is the backbone of Navigate. In our 12+ years of experience, none of our competitors match our people or projects.

Realistic results + actionable insights

Navigate provides actionable results, not big puffy number or “media equivalency.” Our methodology produces the true Fair Market Value, along with expert recommendations.

Best-in-class service

Our goal is to be an extension of your team, collaboratively strategizing to increase sponsorship revenues and overall efficiencies.

Forbes
10 BEST ORGANIZATIONS
TO WORK FOR IN SPORTS

SPORTS BUSINESS
DAILY GLOBAL JOURNAL
FORTY UNDER 40
AWARDS 2015

**NATIONAL
BEST AND
BRIGHTEST**
COMPANIES
TO WORK FOR

CHICAGO'S
**101 BEST AND
BRIGHTEST**
COMPANIES TO WORK FOR

Our Expertise

We believe in **evidence based decision making**.
Our research and consulting focuses on three areas:



Partnerships



Fans



Media

Properties



Brands



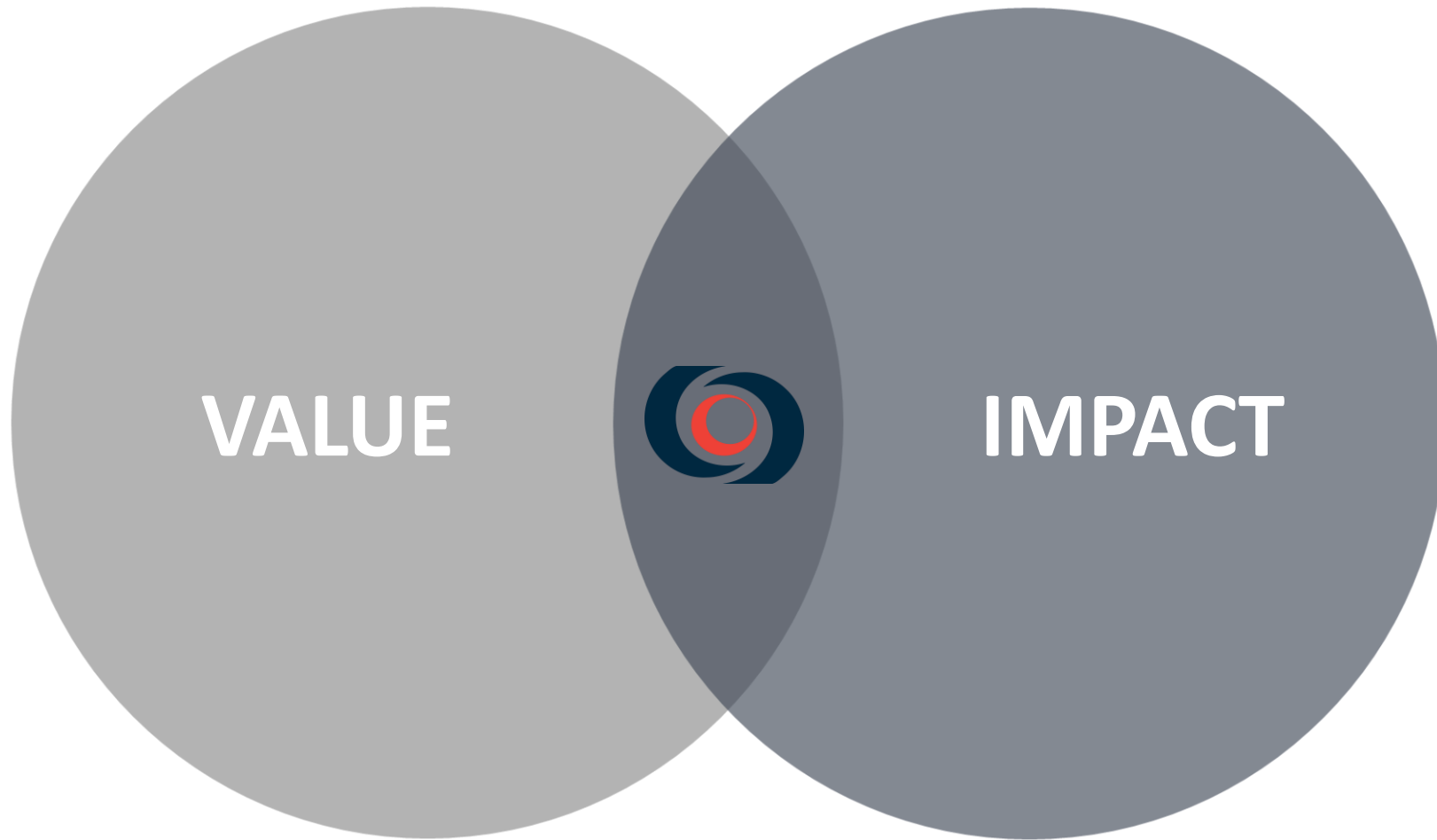
Agencies



Networks



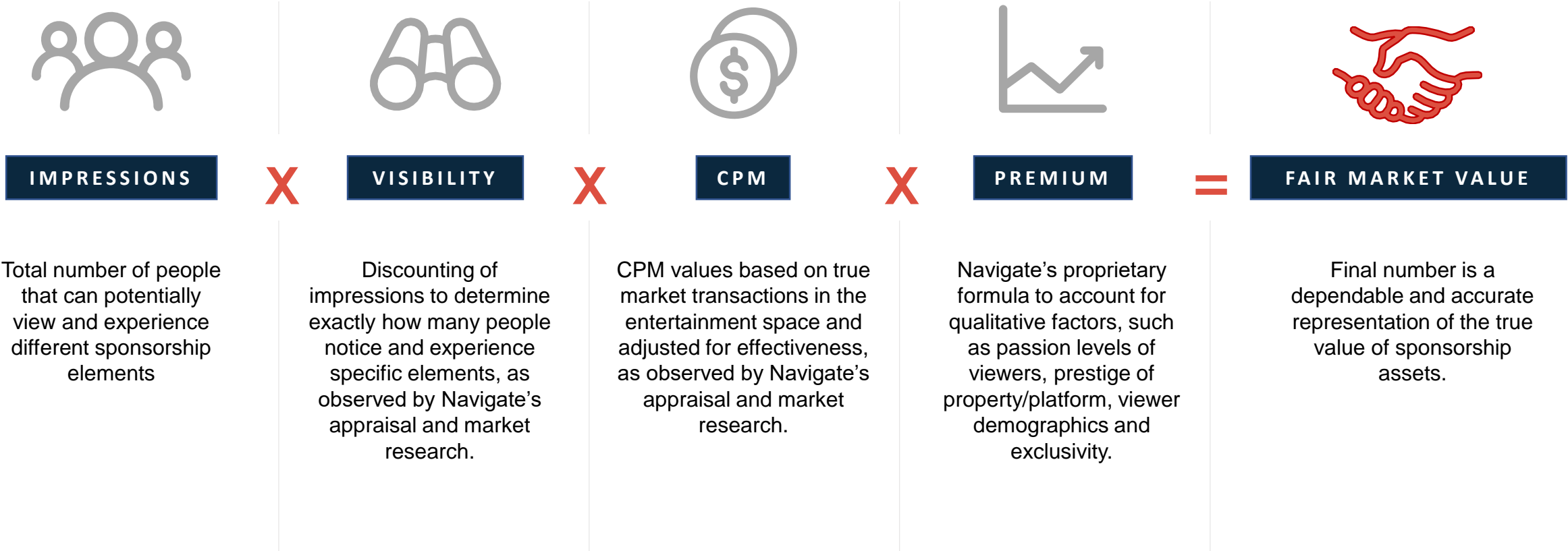
Partnership Evaluation



VALUE

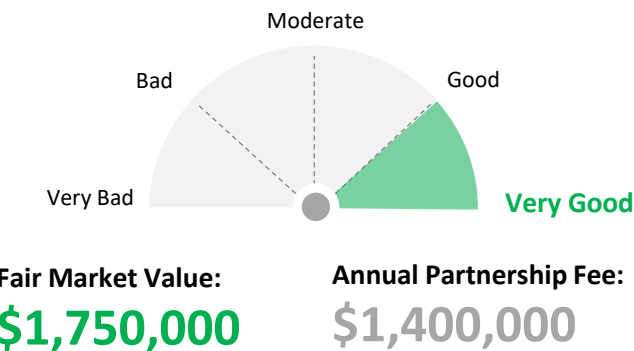
Asset Valuation Methodology

Over **\$4 billion** in sponsorship transactions valued at a **95% confidence** interval with a **+/- 5% error**.



Valuation Summary

Valuation gauge



Fair market value segments

Fair Market Value of BRAND’s Presenting Partnership of the TEAM is estimated to be \$1.75M, or 25% higher than the Annual Partnership Fee. This level of value above the fee is categorized as ‘Very Good’ compared other marketplace transactions. Roughly 40% of the deal value is from the Presenting Partnership of the team while 25% is from Signage, 20% is from Media and the remaining 15% is from Hospitality and other elements.

Media type segments

Various Media Types are being activated through this Partnership with Signage being the predominant messaging method accounting for 45% of the Fair Market Value. Paid Media packages make up another 22% of the value with Radio adding 14%, TV adding 6%, Social Media adding 4% and Other elements adding the remaining 9%.

KEY ASSUMPTIONS (ANNUAL)

1M

1.5M

500k

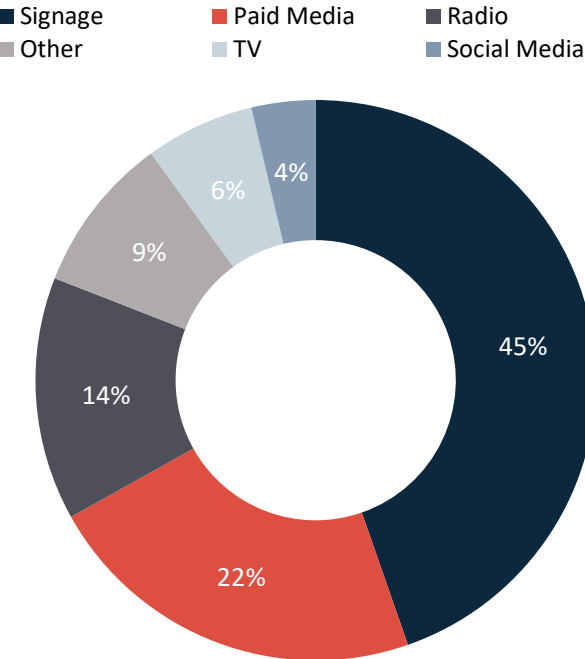
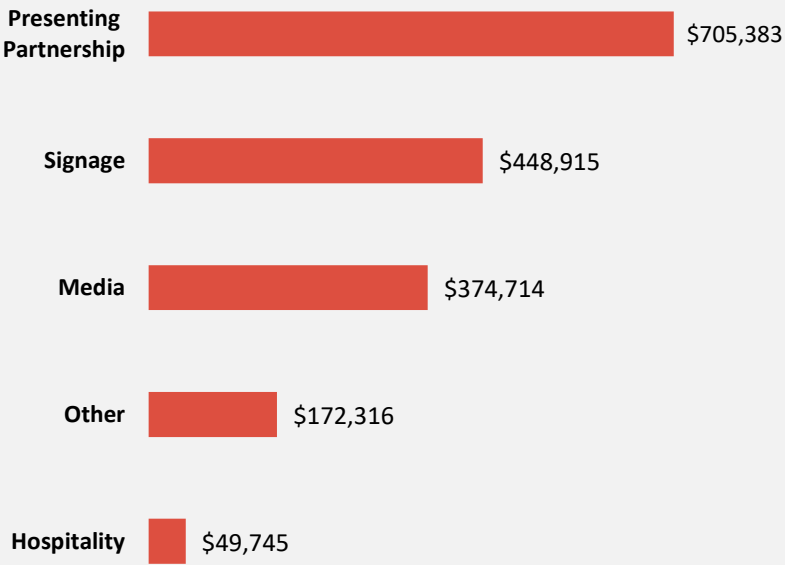
HOSPITALITY PACKAGE VALUE:
\$100,000

ANNUAL PAID MEDIA:
\$3,000,000

ATTENDANCE:
700k

10.5M
RSN BROADCAST VIEWERS

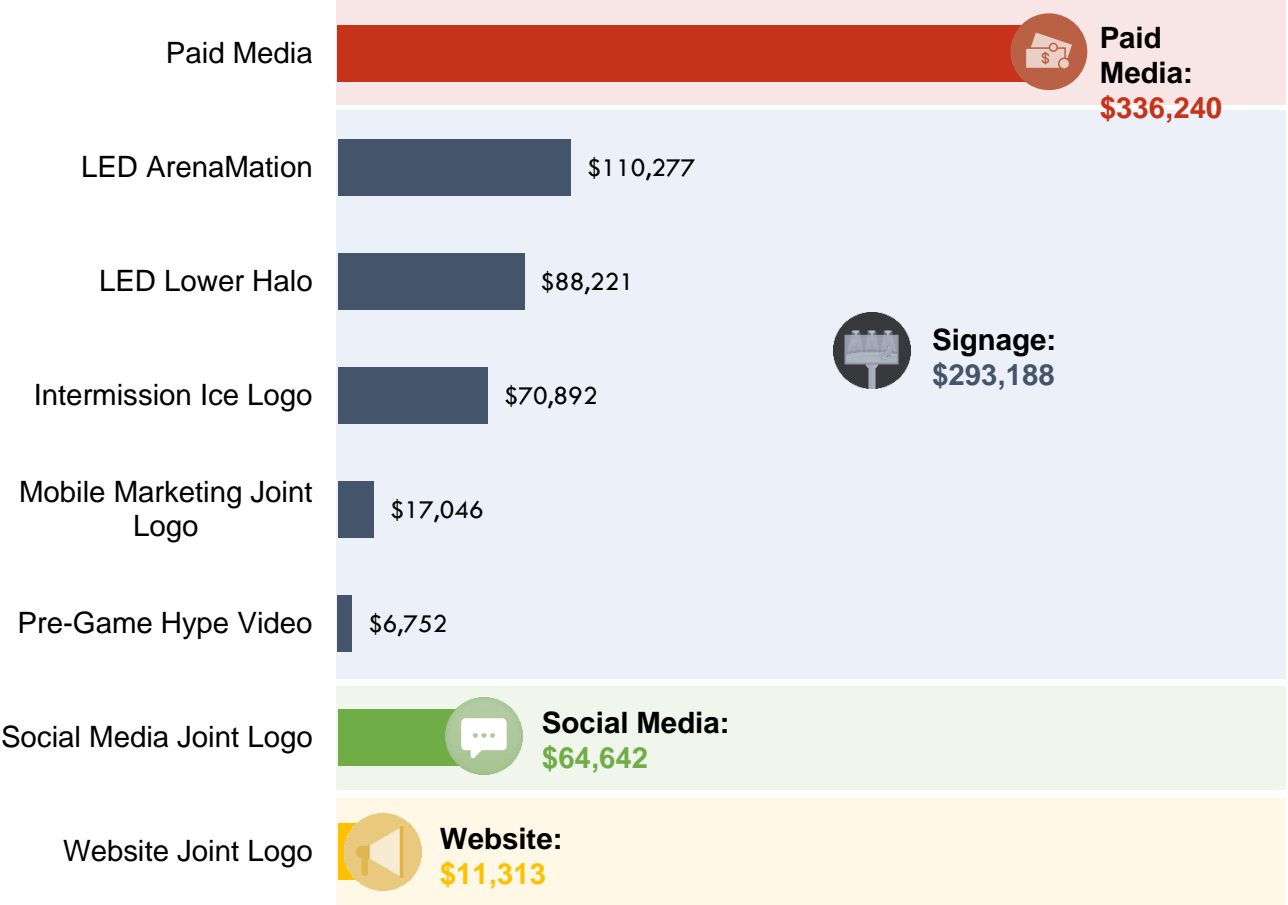
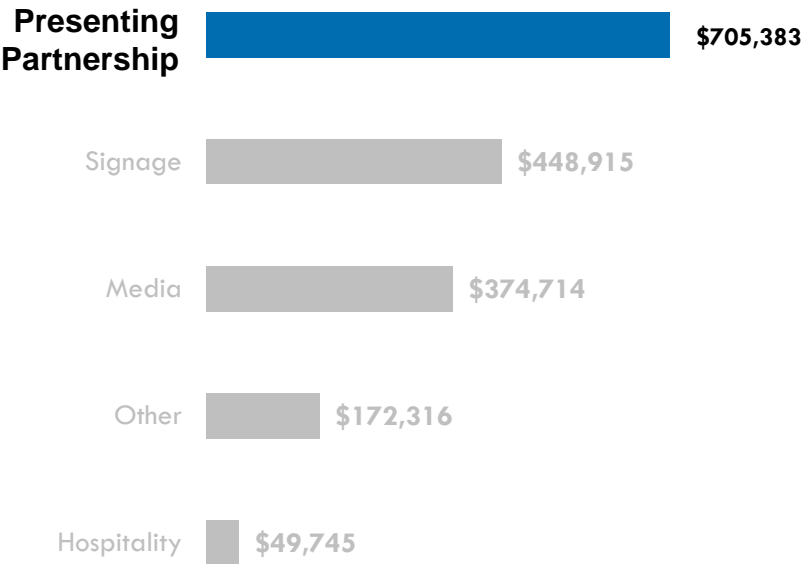
20M
WEBSITE PAGE VIEWS



Category Breakdown

FAIR MARKET VALUE SEGMENTS

The Presenting Partnership segment is very diverse in that it includes several different Media Types. Most of the value is coming from Paid Media where the BRAND's logo is included with the TEAM logo for most team activation. Signage is also a major driver of the value as BRAND X is given pre-game exposure on LED signage locations. Social Media recognition also adds material value through BRAND X's logo included with the TEAM logo on most of the team-generated posts.



Asset by Asset Valuation, Media Buyer



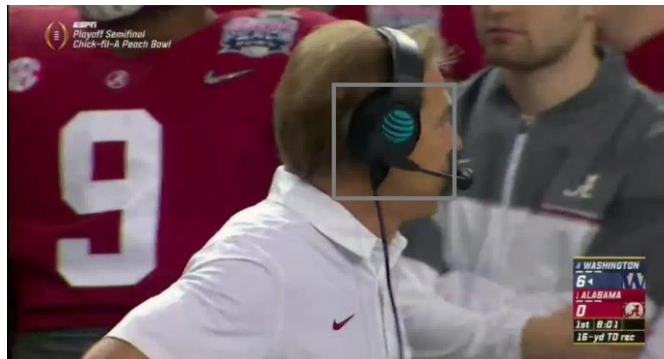
CHAMPIONSHIP GAME
TOP LEFT HAND GRAPHIC
\$X | 114.6 MINS

Though relatively small, the top left hand text graphic is visible for the longest amount of time.



VERBAL MENTIONS
\$X | 83 (QTY)

Verbal mentions reflects hosts and announcers mentioning AT&T during studio shows, bowl games, and the National Championship Game.



HEADSET
\$X | 28.7 MINS

The logo visible on the ears of the headset as well as text on the band across the top of the coaches' heads.



SCREEN GRAPHIC
\$X | 11.2 MINS

The Screen Graphic was a prominent graphic displayed during various studio shows and bowl games.



BLIMP GRAPHIC
\$X | 0.6 MINS

Though visible for less than a minute, the blimp was prominent on-screen.



COUNTDOWN TO KICKOFF TEXT GRAPHIC
\$X | 354.4 MIN

Though the text is small, the amount of time it is visible makes the text along the bottom the longest exposed asset and very valuable.

Benchmarking Methodology

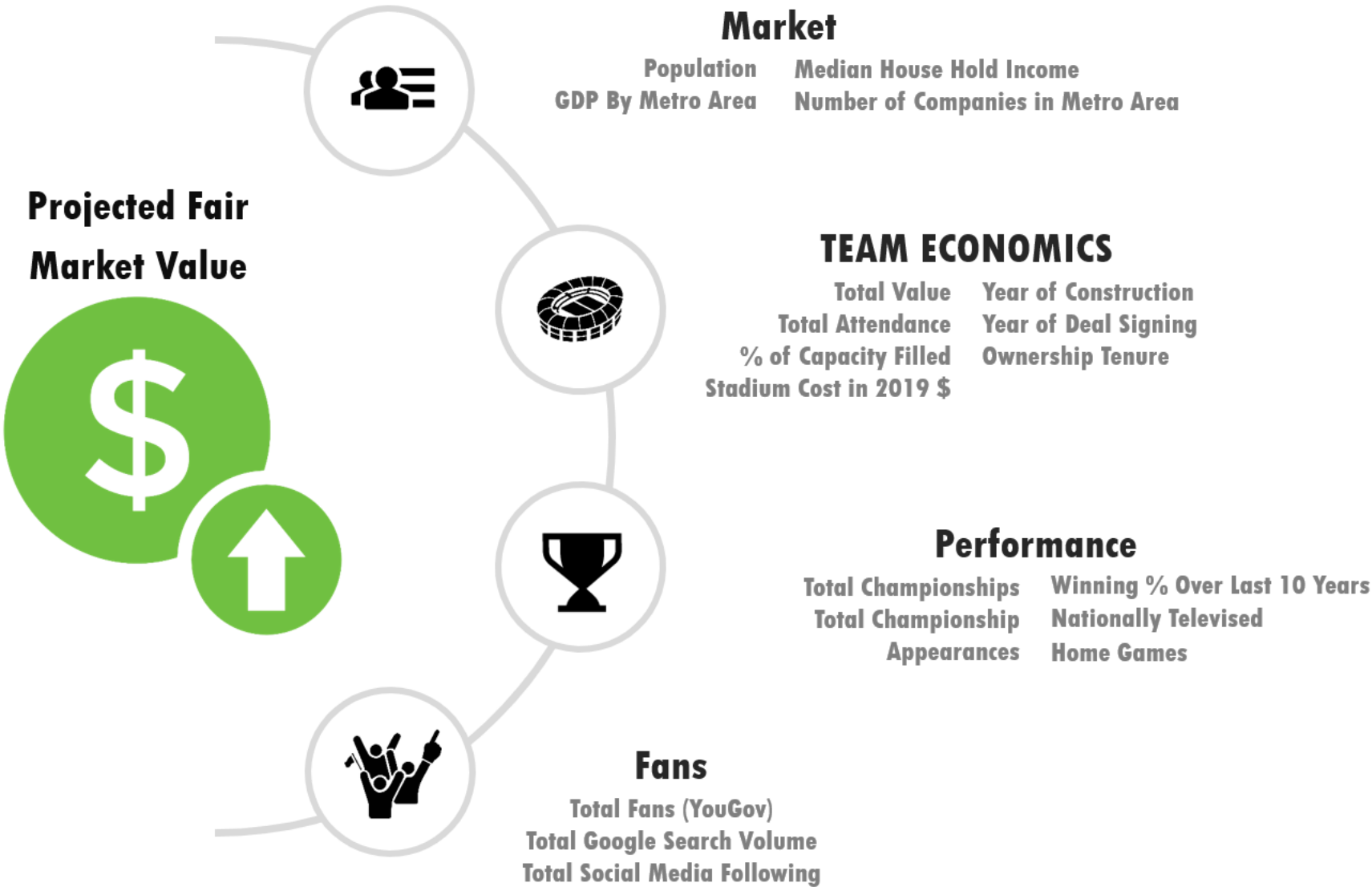
A top-down approach to estimate the value based on current marketplace deals



Identifying Influential Variables

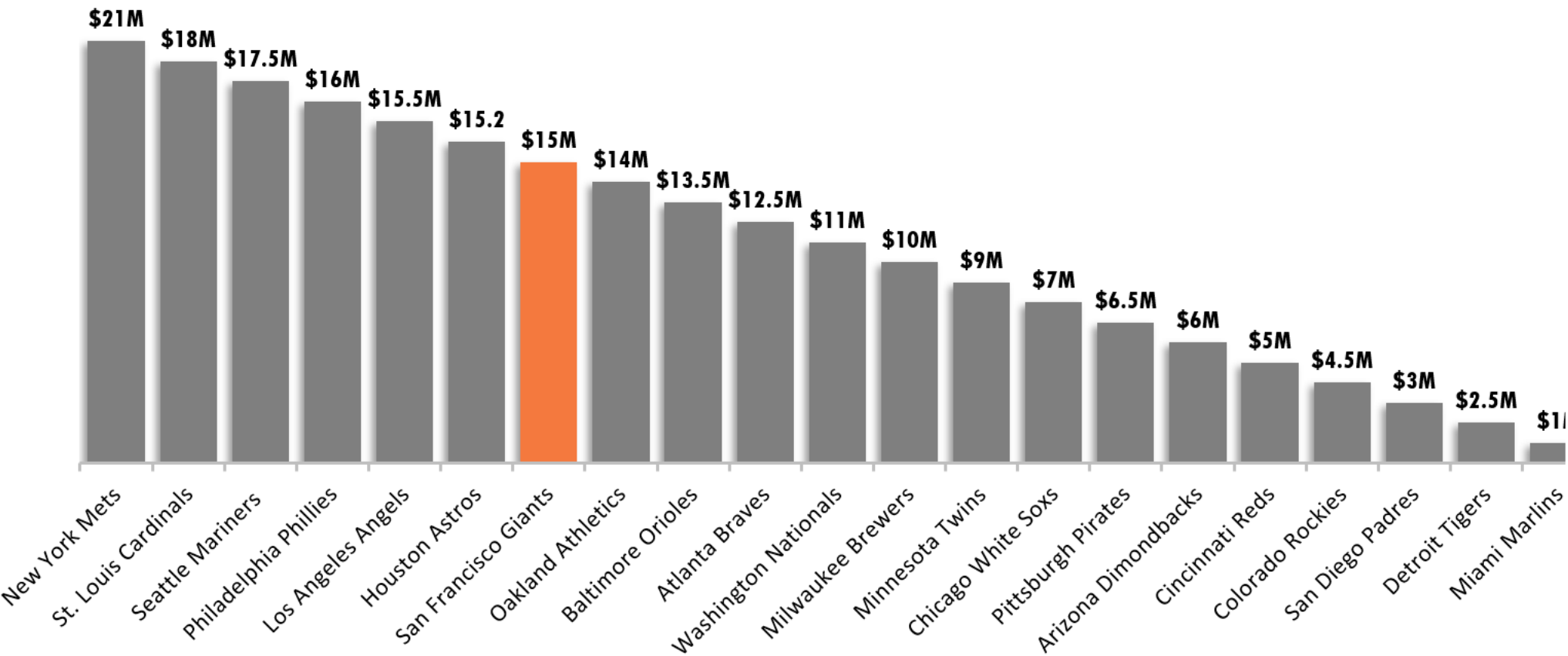
WHAT VARIABLES WERE CONSIDERED?

Variables categorized into four separate clusters were found to be correlated with the average annual value of current MLB naming rights sponsorships.



Benchmarking Result

ACTIVE MLB Naming Rights Deals

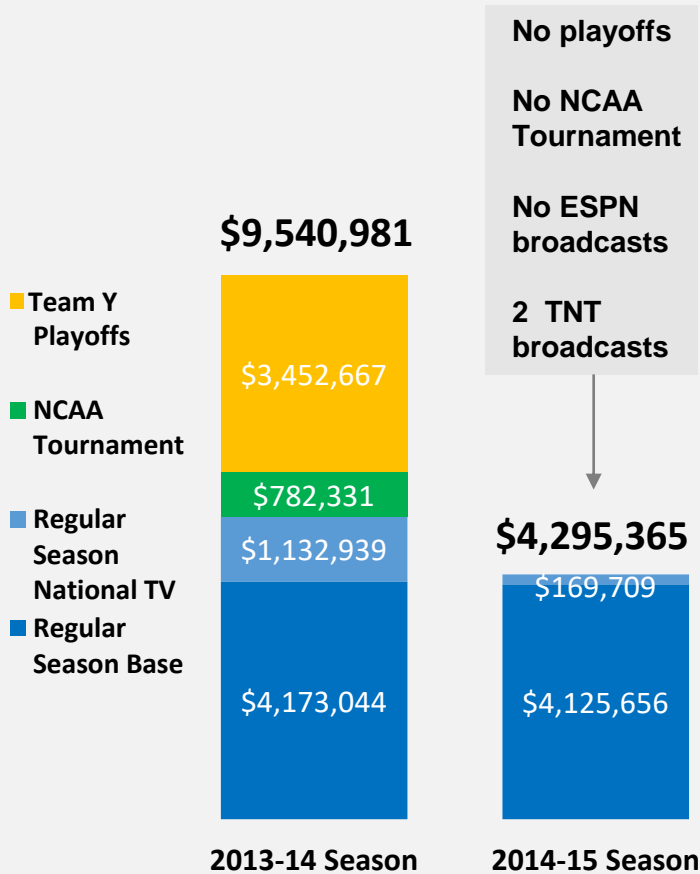


*Giants Projected Fair Market Value vs. currently established deals within the league.

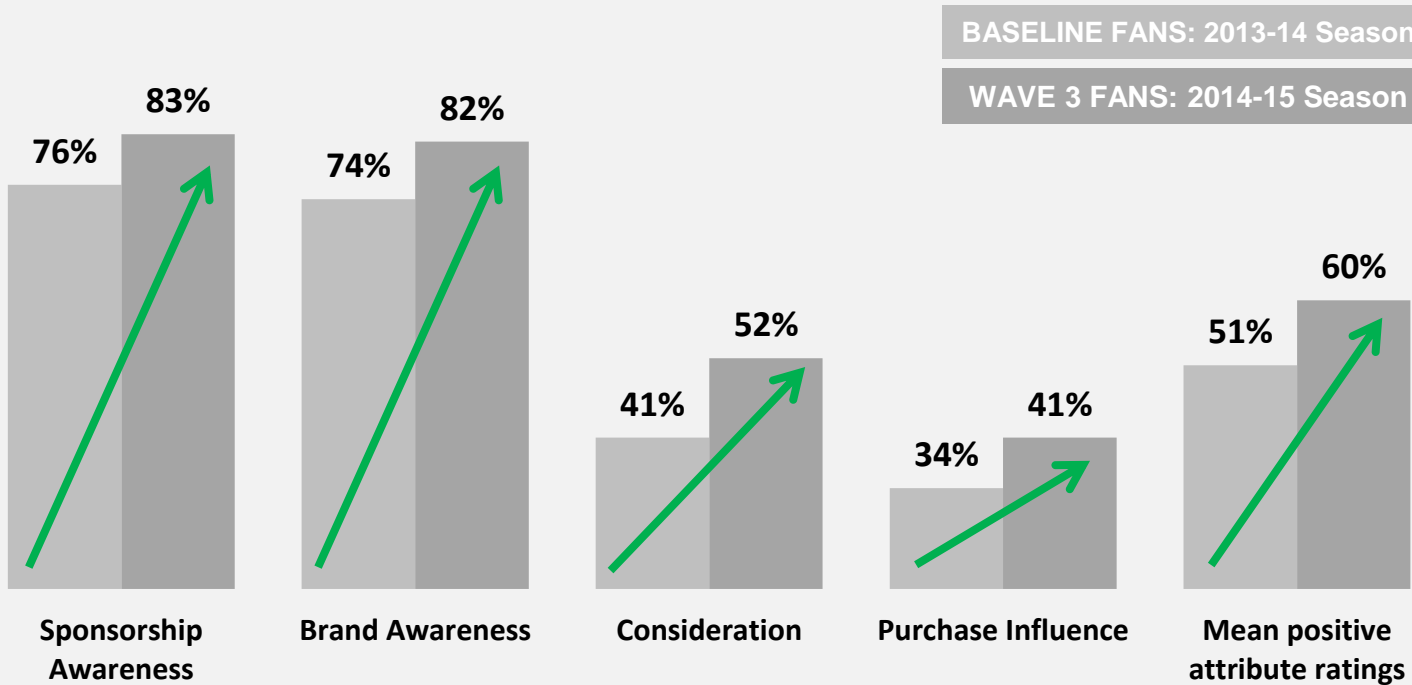
Value v. Impact



Fair Market Value of exposure **fell 55%**



Sponsorship performance **rose in several metrics**



Case Study: Keurig Dr. Pepper



OBJECTIVES

With a comprehensive sports sponsorship portfolio across several markets, professional teams and college teams, KDP wanted to establish a consistent approach to the measurement, evaluation and selection of their deals, including fair market value of their sponsorship deals as well as the actual impact.



SOLUTION

Navigate helped KDP establish a three-pronged approach to sponsorship analysis. First, Navigate estimated the fair market value of their major deals to truly understand if they were paying the proper fees for their deals. Second, we quantified the impact of their major deals by measuring purchase funnel KPIs in some major markets. Third, we assembled a proprietary scoring algorithm using both primary and secondary data points to help KDP identify the best and worst performers within their portfolio.



RESULTS

Through utilizing Navigate's new three-pronged approach, KDP is continuously making smarter decisions surrounding renewals and new sponsorship opportunities.



A large crowd of people is seated in a stadium, filling the background. In the foreground, a person is seen from the side, wearing a white cap and a dark shirt, holding a flag. The overall scene is dimly lit, with a blue tint.

IMPACT



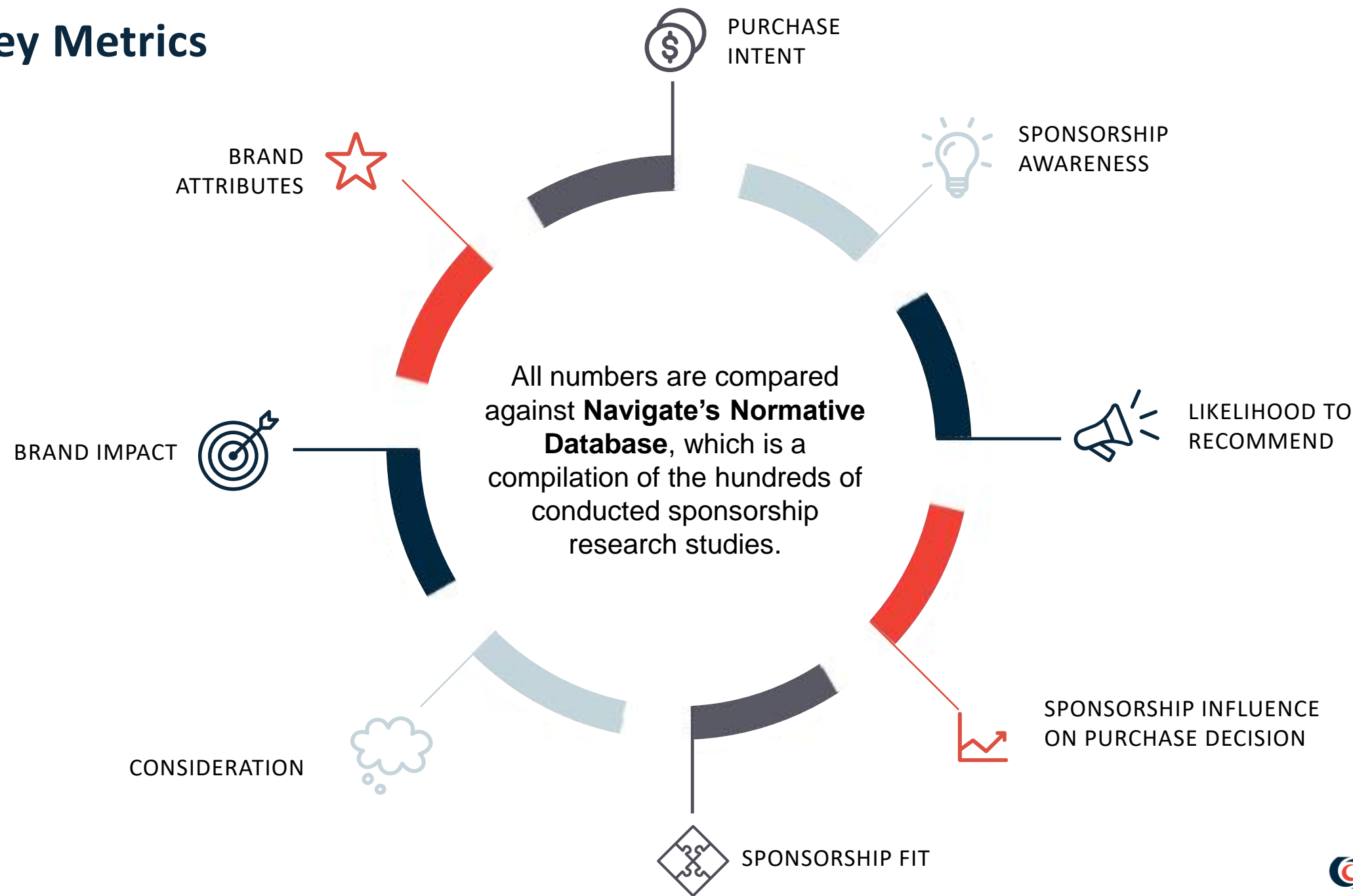
Aware fans are **3x** more likely to purchase
and **2x** more likely to recommend.

Break through the clutter...

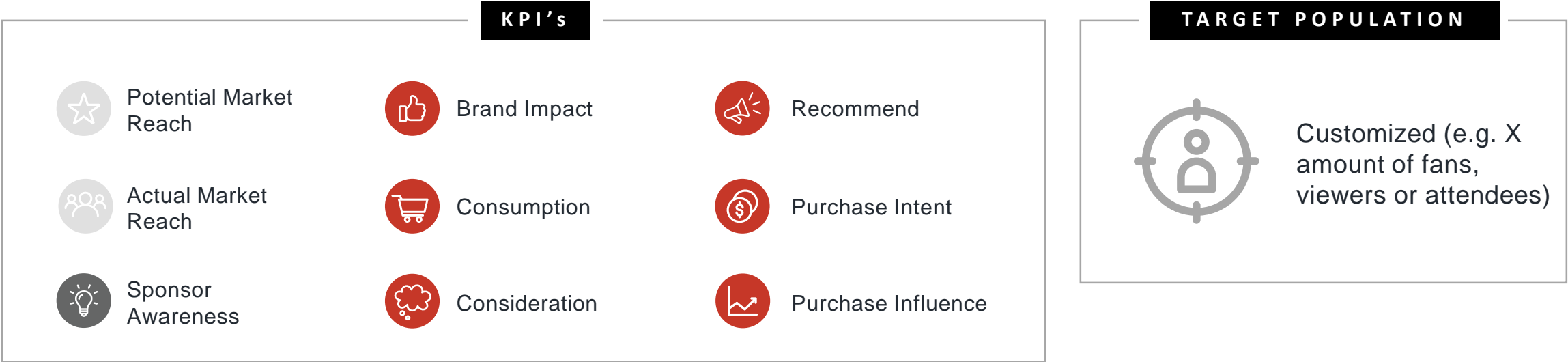
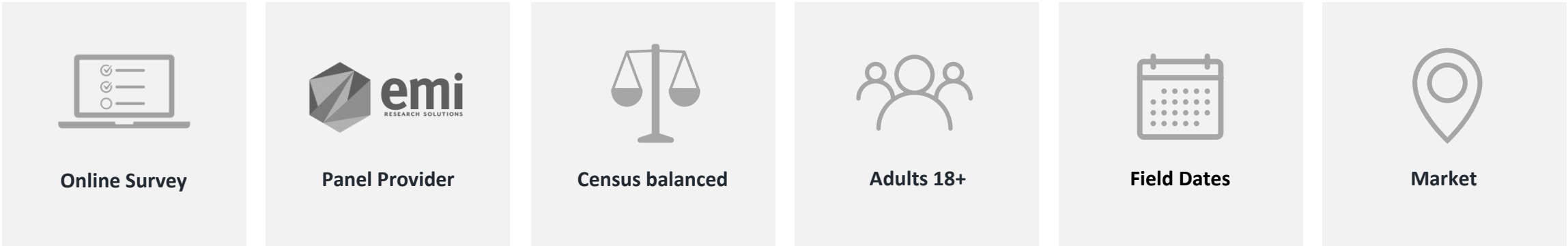
Activation vs. Rights

\$.50 for every **\$1**

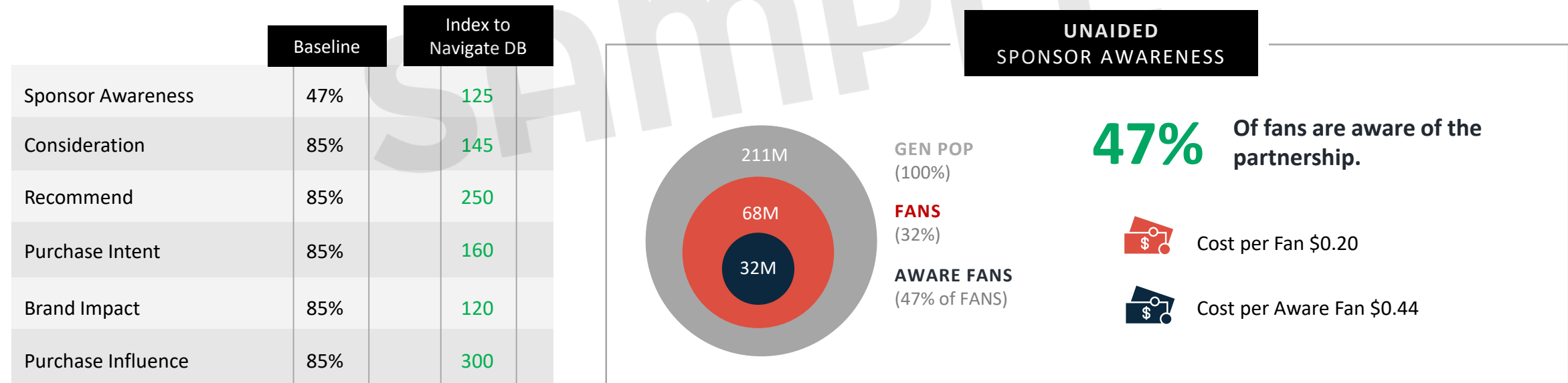
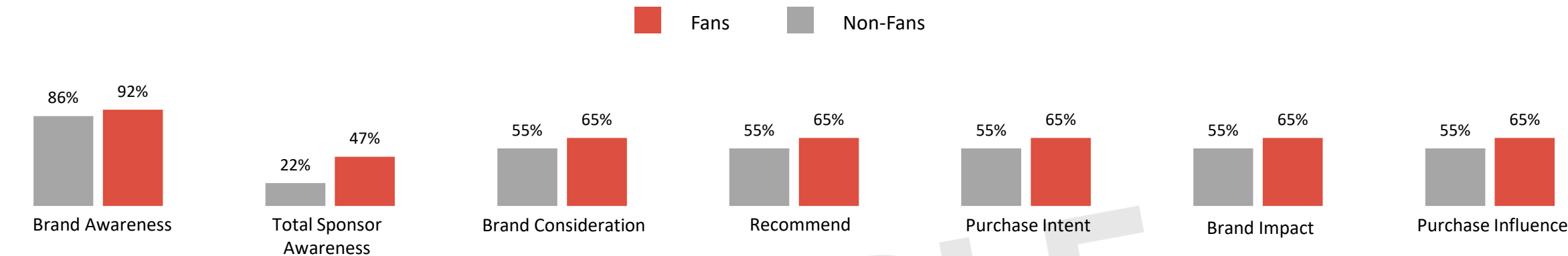
Key Metrics



Impact Research Methodology



KPI Impact Among Exposed Population

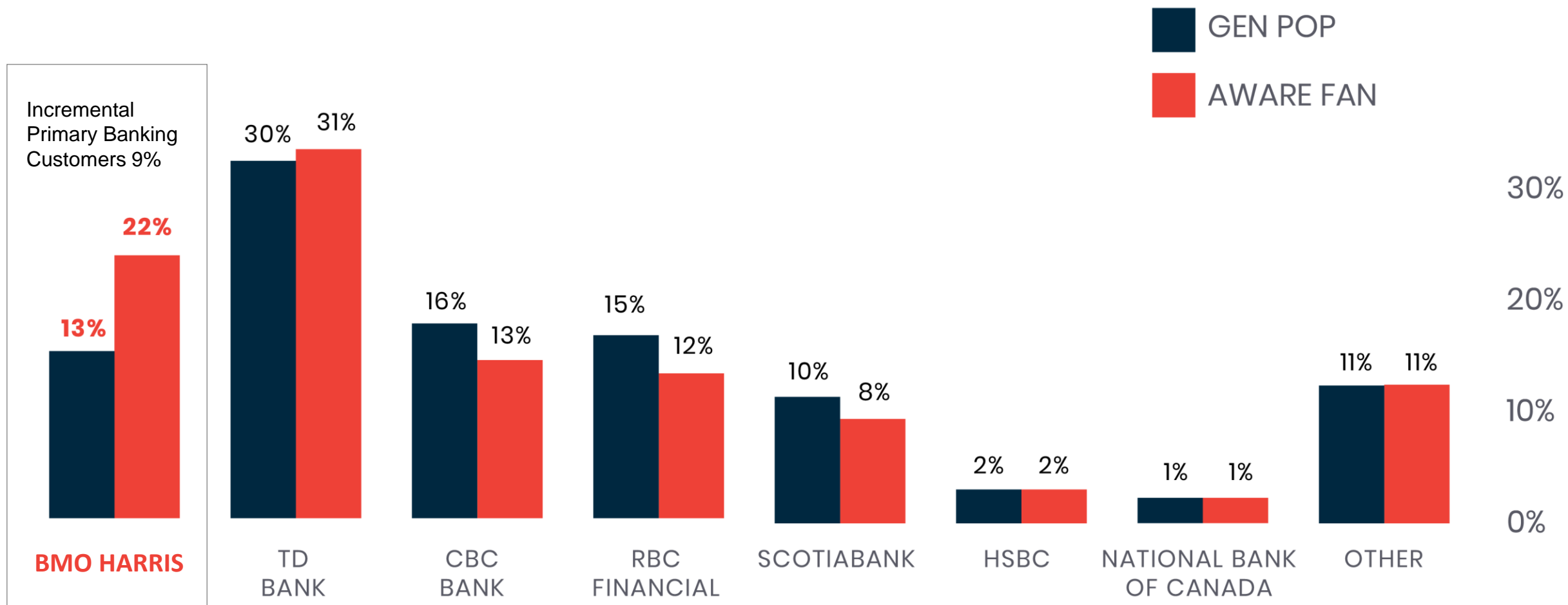


Sponsor Awareness = Fans;
Other KPI's = Aware Fans

Multi-Property Impact Research Summary

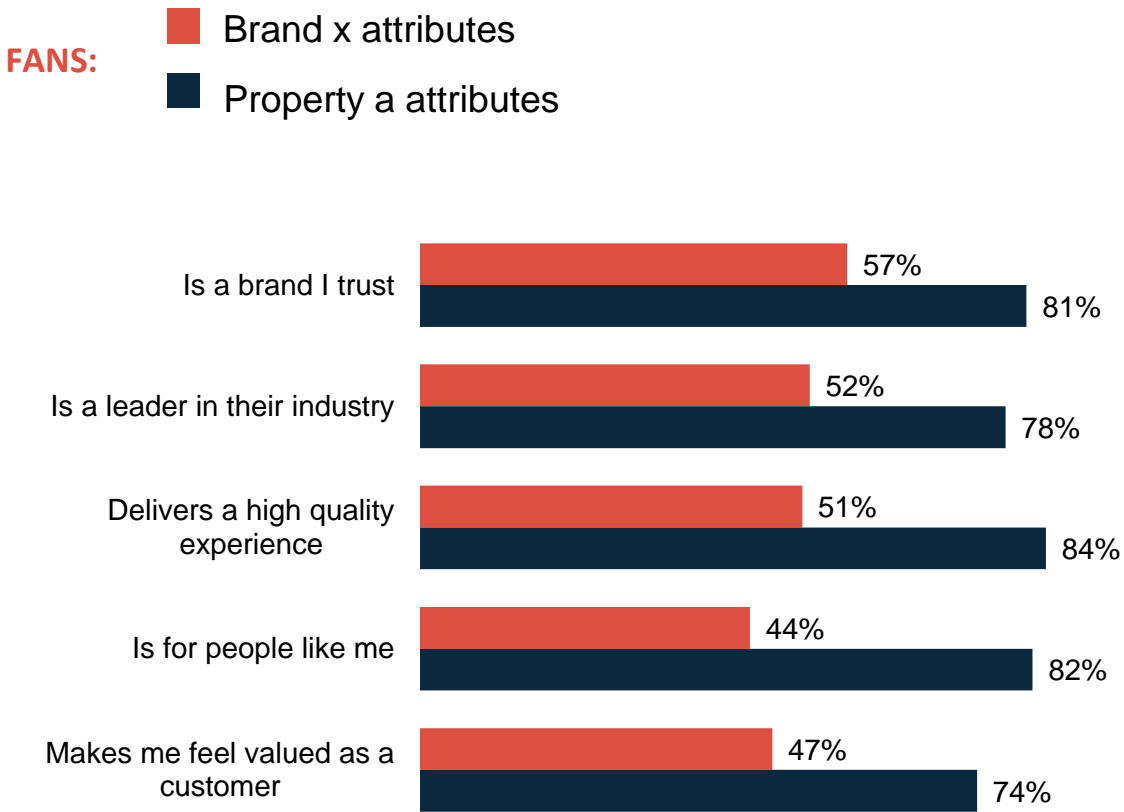
		<div>OVER PERFORMING NAV DATABASE</div> <div>ON PAR WITH NAV DATABASE</div> <div>UNDER PERFORMING NAV DATABASE</div>				
		Over performing = Index > 119 On Par = Index 81-119 Under performing = Index < 81				
		<div>FAN</div> <div>AWARE FAN</div>				
		Property A	Property B	Property C	Property D	Property E
REACH	Aware fans	~15,000,000	~145,000	~15,300,000	~37,000,000	~27,900,000
	Cost per fan	\$0.19	\$0.27	\$0.09	\$0.16	\$0.12
	Cost per aware fan	\$0.57	\$2.74	\$0.54	\$0.33	\$0.29
KEY METRICS	Sponsorship Awareness	34%	10%	17%	50%	41%
	Consideration	66%	83%	55%	78%	88%
	Purchase Intent	n/a	n/a	n/a	52%	79%
	Recommend	78%	53%	59%	68%	75%
	Brand Impact	84%	63%	63%	68%	72%
	Purchase Influence	66%	40%	47%	71%	52%
	Importance	71%	47%	n/a	n/a	n/a
	Brand Fit	75%	50%	57%	61%	62%

Case Study: Maple Leaf Sports & Entertainment

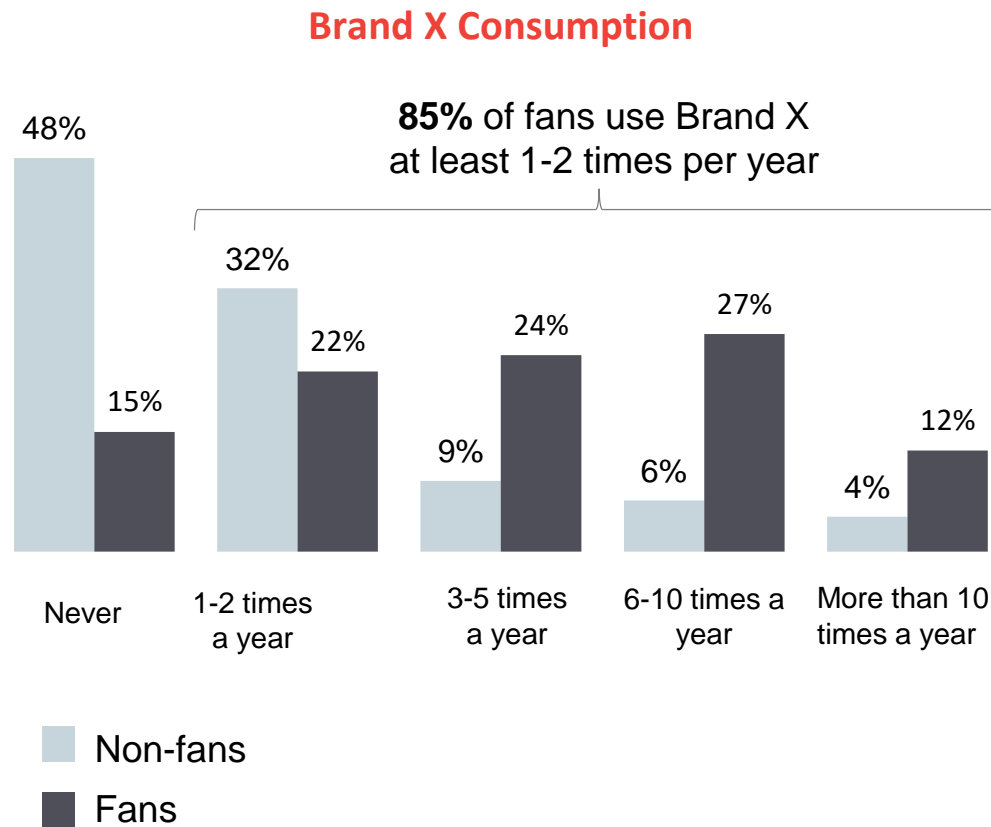


Brand Attribute & Consumption Lift

Brand X's partnership with Property A returns some of the most positive brand attribute results we have seen



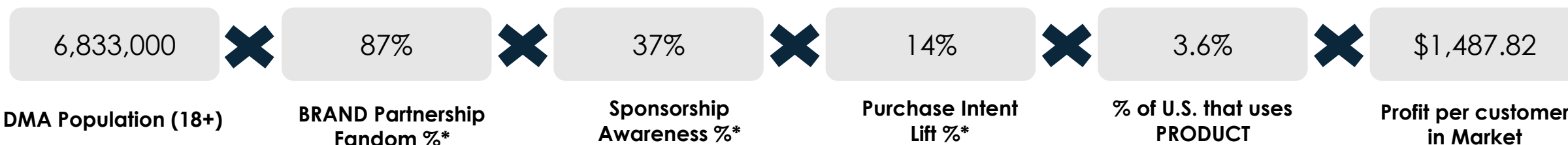
Brand X has built a loyal customer base of Property E fans











ROI Methodology – Step 1



Navigate used the collective DMA performance in the Chicago DMA to estimate the incremental profit BRAND gains from the entirety of its Chicago portfolio. Navigate then developed a proxy for uniqueness of each fanbase (using the primary research fan data) to allocate estimated incremental profit for each team.



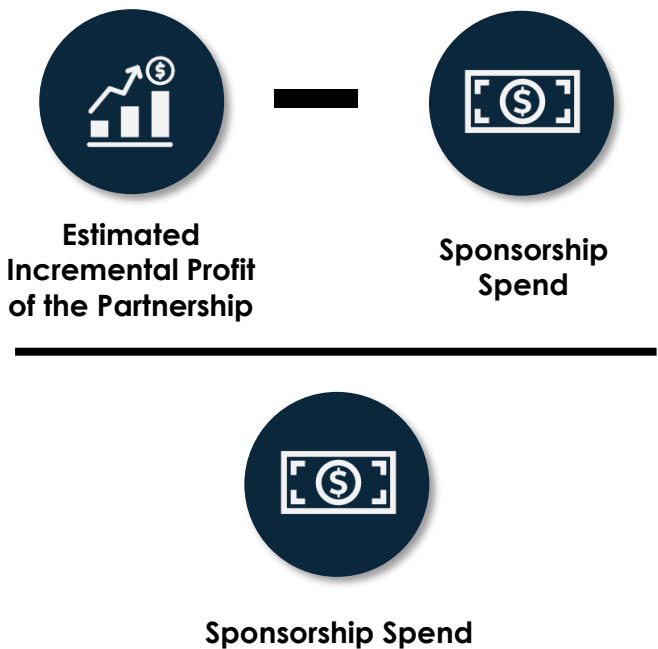
Estimated Incremental Profit:
\$16,760,793

Property	Fandom Uniqueness**	Estimated Incremental Profit
 Chicago Bears	22.7%	\$3,800,633
 Chicago Blackhawks	17.2%	\$2,888,481
 Chicago Bulls	16.6%	\$2,774,462
 Chicago White Sox	13.2%	\$2,204,367
 Northwestern University	8.2%	\$1,368,228
 University of Illinois at Urbana-Champaign	7.9%	\$1,330,222
 University of Illinois at Chicago	6.8%	\$1,140,190
 Northern Illinois University	7.5%	\$1,254,209









ROI Methodology – Step 2

Navigate believes the positive ROI %s are an indication that BRAND is **effectively reaching fans with multiple touchpoints**. Collectively, the Chicago market is generating \$5.37 in profit for every dollar spent on sponsorships. The college partnerships look to be among the top performing deals; however, this can mainly be attributed to the halo effect from other partnerships in the market and the low cost associated with each college.

ROI% FORMULA



Estimated Incremental Profit for Chicago DMA: \$16,760,793

Property	Estimated Incremental Profit	BRAND Annual Spend	ROI %
 Chicago Bears	\$3,800,633	\$610,017	523%
 Chicago Blackhawks	\$2,888,481	\$463,500	523%
 Chicago Bulls	\$2,774,462	\$705,373	293%
 Chicago White Sox	\$2,204,367	\$431,833	410%
 Northwestern University	\$1,368,228	\$255,348	436%
 University of Illinois at Urbana-Champaign	\$1,330,222	\$103,000	1191%
 University of Illinois at Chicago	\$1,140,190	\$36,500	3024%
 Northern Illinois University	\$1,254,209	\$27,500	4461%

Case Study: NBA Partnership Impact



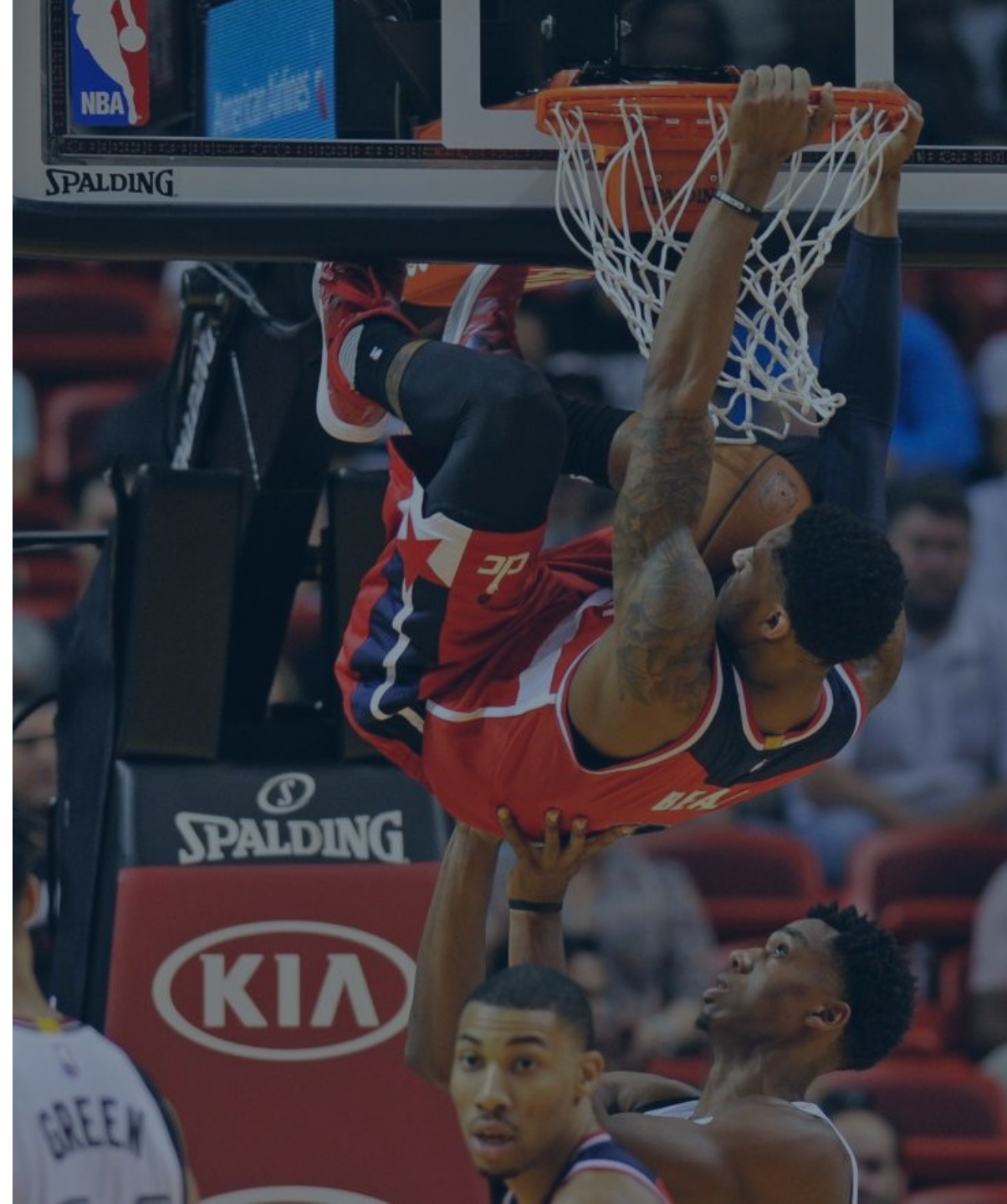
SCOPE

The NBA sought a comprehensive understanding of the value and benefits that five of their key partners were receiving through their sponsorship agreements, to help with renewal negotiations and to be used as a sales tool for new sponsors.



RESULT

Navigate completed ten Partnership Impact studies (pre and post-wave), assessing the impact of the partnerships, including awareness, consideration, purchase intent, sponsorship fit, etc. The impact studies provided the NBA with valuable information pertaining to the effectiveness of each of its partnerships, as well as new activation ideas to assist in successful renewals



Case Study: Enterprise Rent-A-Car

OBJECTIVES



Enterprise Holdings (EH) needed to establish a consistent method for measuring partnerships across each brand in its portfolio (Enterprise, National, Alamo) to understand over- and under-performing partnerships and inform renewal priorities. Enterprise also wanted to understand how key sponsorship metrics shifted over time.

SOLUTION



Navigate conducted tracking research on sponsorship impact over a three year period for sponsorships of the NCAA and NHL (Enterprise), 8 MLB teams and NFL (National), and Disney Parks (Alamo). Navigate's proprietary sponsorship impact comparative database helped give context to EH's results across the sponsorship landscape as well as internally.

RESULTS



Enterprise used Navigate's research and counsel to inform portfolio decisions such as its recent NHL league partnership renewal and expanded Navigate's services to include evaluation of European soccer partnerships as they break into that market.



Case Study: Anheuser-Busch Inbev



OBJECTIVES

Anheuser-Busch InBev needed to evaluate its current US partnership portfolio and identify whether there are sports or entertainment properties across the country that would strong partnership opportunities that they had previously overlooked.



SOLUTION

Navigate designed custom primary research across all of A-B's priority U.S. markets to understand how passion points differ across markets as it relates to sports, music, food, travel, outdoor activities, and more. We then paired the primary research results with secondary research and internal A-B data to create a sponsorship priority scorecard for sports and entertainment properties in each market.



RESULTS

A-B used Navigate's scorecard and consulting to develop five year sponsorship gameplans for each market. Once the strategies were established, A-B used Navigate's research to generate buy-in for the local strategies from regional heads and distributors.



THANK YOU!

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