

# International Weightlifting Federation

Partner Taxonomy

March 2016



# IWF

INTERNATIONAL  
WEIGHTLIFTING  
FEDERATION



# Agenda

## **Taxonomy of Partners - Overview**

**a. Sponsors**

**b. Media Partners**

**c. Sports & Media Agencies profiles**

**Backup (Case Studies)**

# Two overarching partnership models are prevalent in the global sports industry



The IWF can also choose to affiliate itself with the Partner through a Joint-Venture (JV) organization, with clearly defined responsibilities and outcomes for all parties involved.

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## Backup (Case Studies)

# The Sponsor-model equals receipt of funding or equipment in exchange for advertising

**World sports sponsorship market is worth an estimated \$50 billion/year**

1

## Funding

Sports Federations receive on average more than \$2 billion/year in sponsorships, with the average deal value amounting to \$4.6m

2

## Equipment

This type of sponsorship comes in all forms (apparel, accessories, gear, facilities, specialist equipment, etc.), from global, regional and event partners which support the international sports federations in delivering top-tier sporting experiences to all involved parties

3

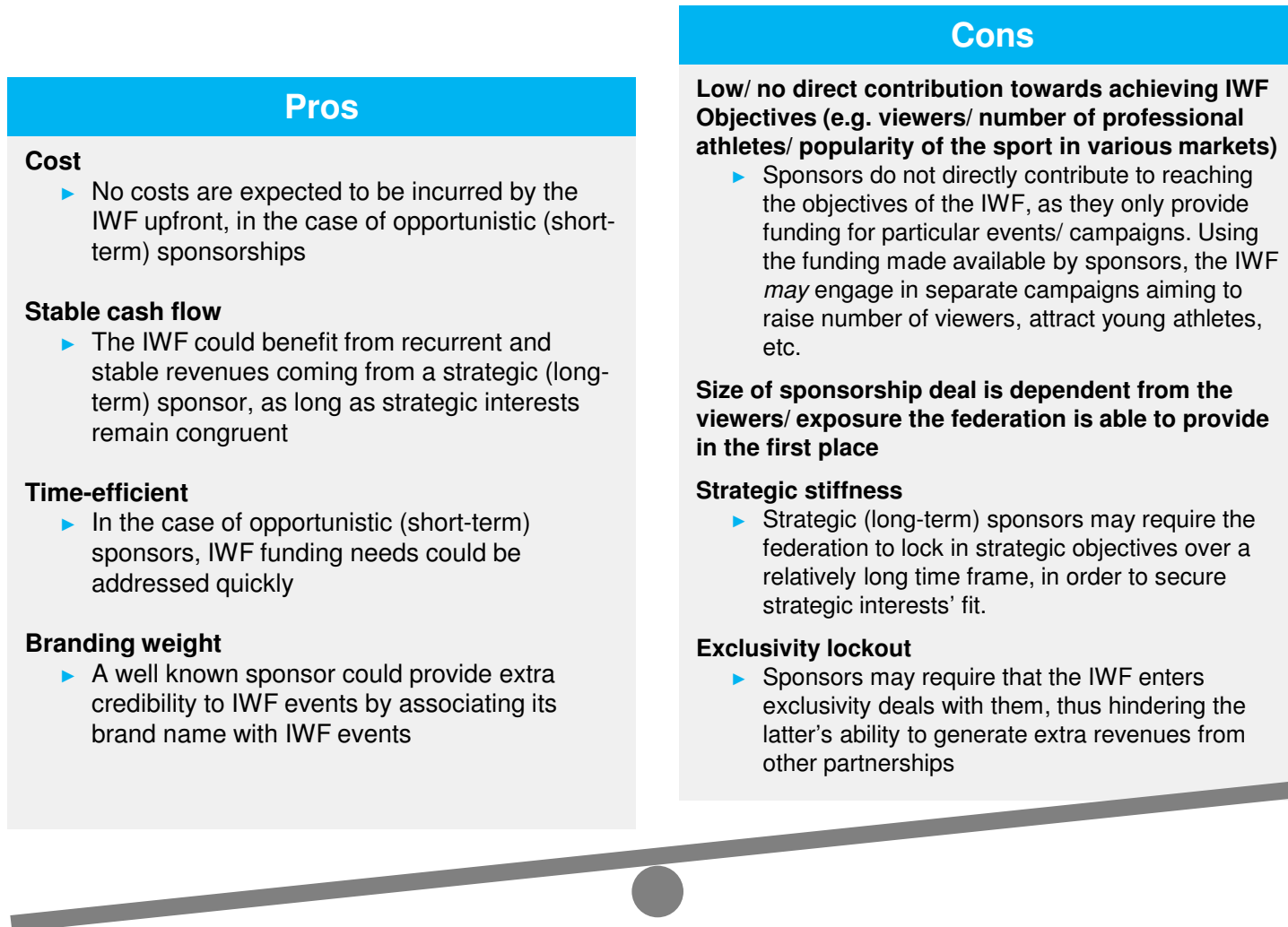
## Merchandising

Supplements revenues and converts event participation, alongside serious fan-base support, into extra sales of original merchandise and souvenirs in order to show an enthusiastic involvement with the sport













### Umbrella Programme

All of the above sponsorship opportunities give companies the chance to be considered “primary suppliers” and, in return for an inclusion fee, they gain premium access to events organized by the Federation













# Finding an opportunistic Sponsor could be cheap and fast, but a long-term deal requires clear strategic objectives



# Top Sports Sponsorships in 2015 (1/2)

Sport Federation	Sponsor	Facts and figures
		▶ Toyota signs \$1.63bn deal with IOC over 8 years, from 2017 to 2024
		▶ AB InBev signs \$1.4bn deal with the NFL over 6 years, from 2017 to 2022
		▶ Nike signs \$1bn deal with the NBA over 8 years, from 2017-18 to 2024-25
		▶ Adidas signs \$940m deal with Bayern Munich over 15 years, from 2015-16 to 2029-30
		▶ Verizon signs \$400m deal with the NBA over three years, from 2015-16 to 2017-18
		▶ Adidas signs \$330m deal with the Spanish Football Federation over 11 years, from 2015-2016 to 2025-2026

# Top Sports Sponsorships in 2015 (2/2)

Sport Federation	Sponsor	Facts and figures
		▶ Majestic Athletic signs \$275m deal with Major League Baseball over 5 years, from 2015 to 2019
		▶ Nike signs \$250m deal with the University of Texas over 15 years, from 2017 to 2031
		▶ Adidas signs \$238.7m deal with Juventus over 6 years, from 2015-16 to 2020-21
		▶ US Bank signs \$200m deal with the Minnesota Vikings over 20 years, from 2016 to 2035
		▶ Hyundai signs \$200m deal with the NFL over 4 years, from 2015-16 to 2018-19
		▶ Shell signs \$200m deal with Ferrari over 5 years, from 2016 to 2020



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## Taxonomy of Partners - Overview

a. Sponsors

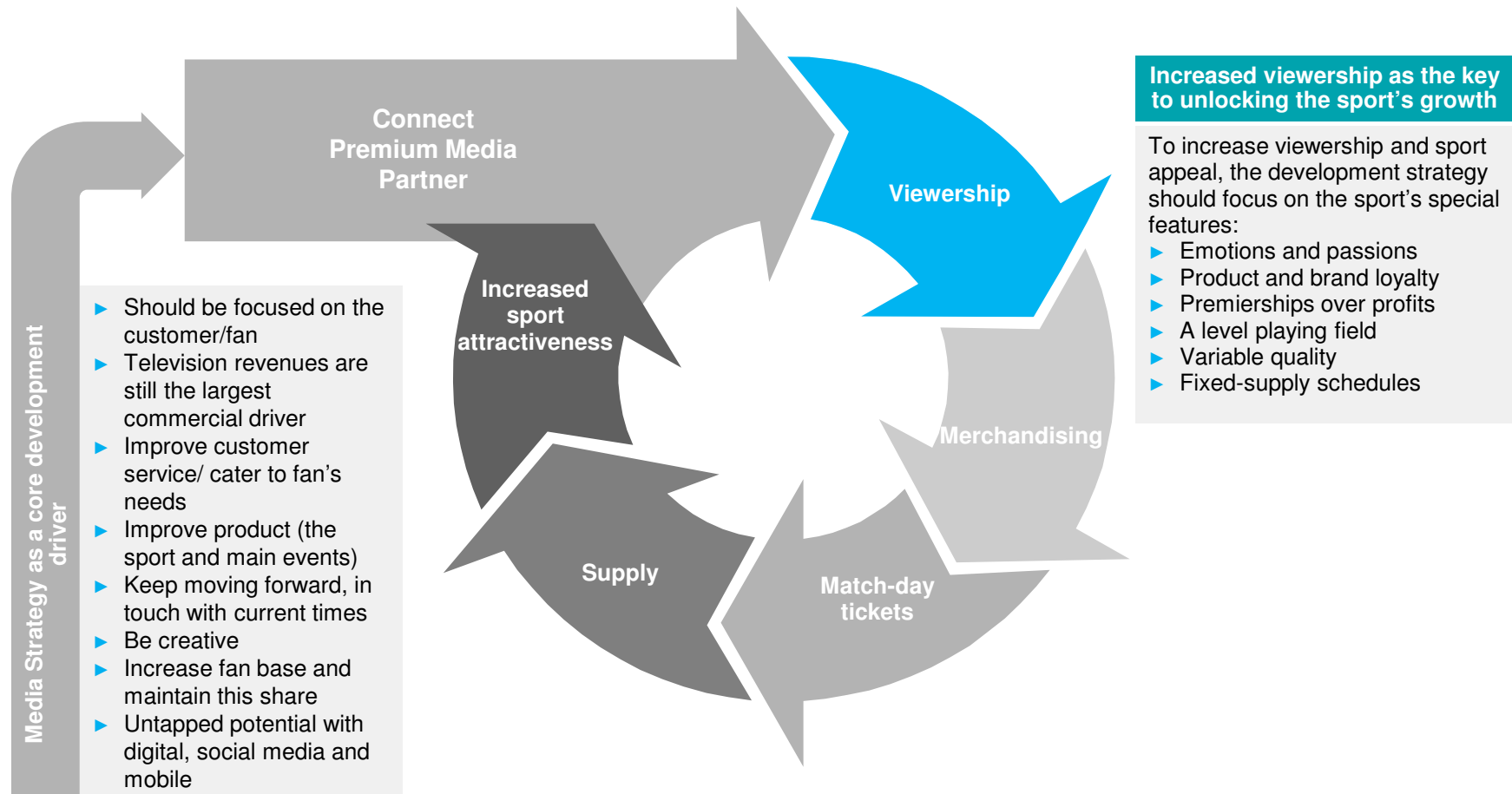
**b. Media Partners**

c. Sports & Media Agencies profiles


**Backup (Case Studies)**

# Media Partners focus on increasing viewership as the main revenue driver

## High-level overview of the indirect revenue generation model



Response	Percentage
Doing a good job	45%
Not doing a good job	55%

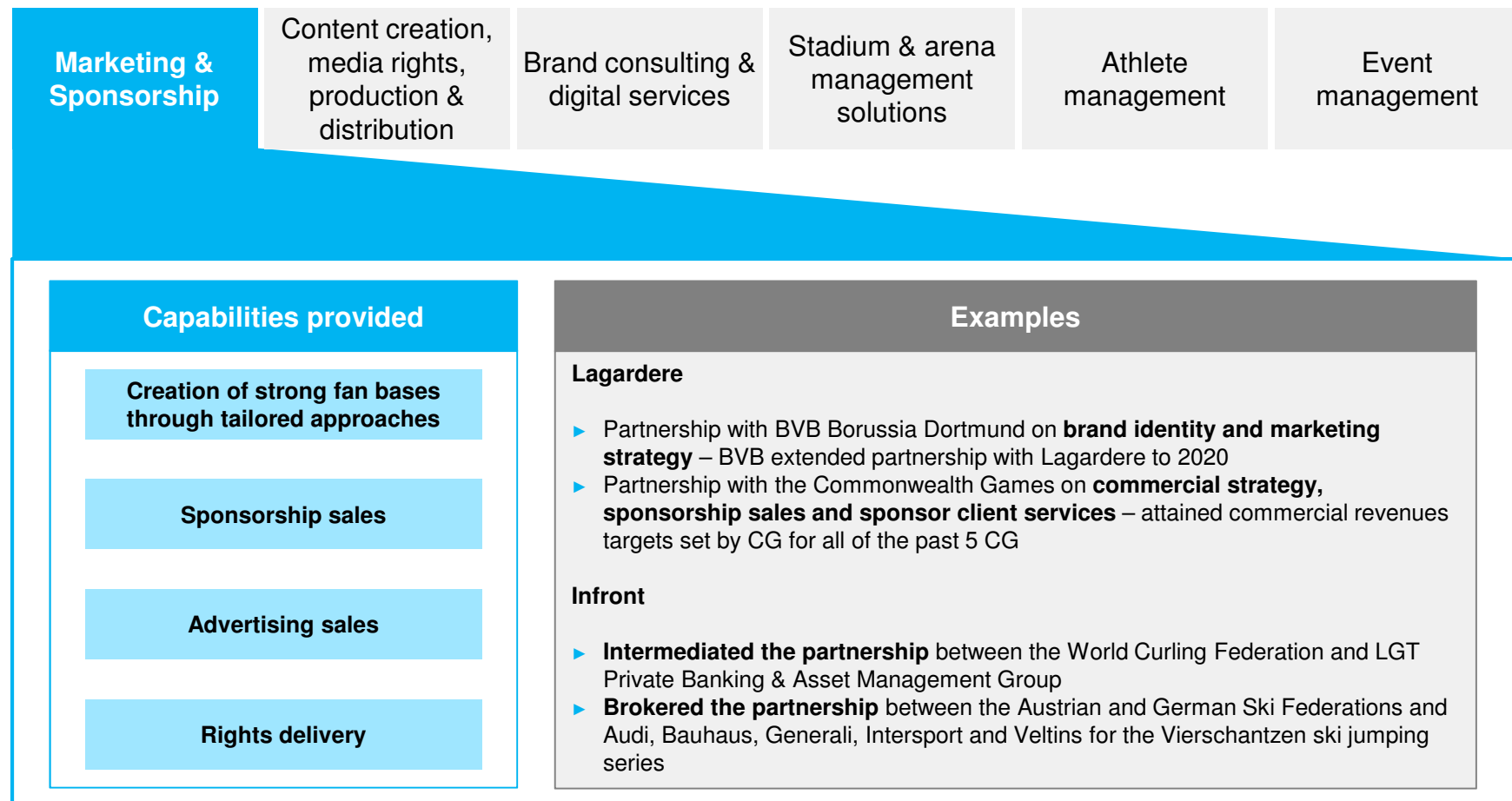


The diagram is shaped like a house. The roof is a light gray triangle with the text "Media Partner" centered in bold black font. The base of the house is a gray horizontal bar. Below this bar are six teal-colored rectangular boxes, each containing white text. From left to right, the boxes contain: "Marketing & Sponsorship", "Content creation, media rights, production & distribution", "Brand consulting & digital services", "Stadium & arena management solutions", "Athlete management", and "Event management".

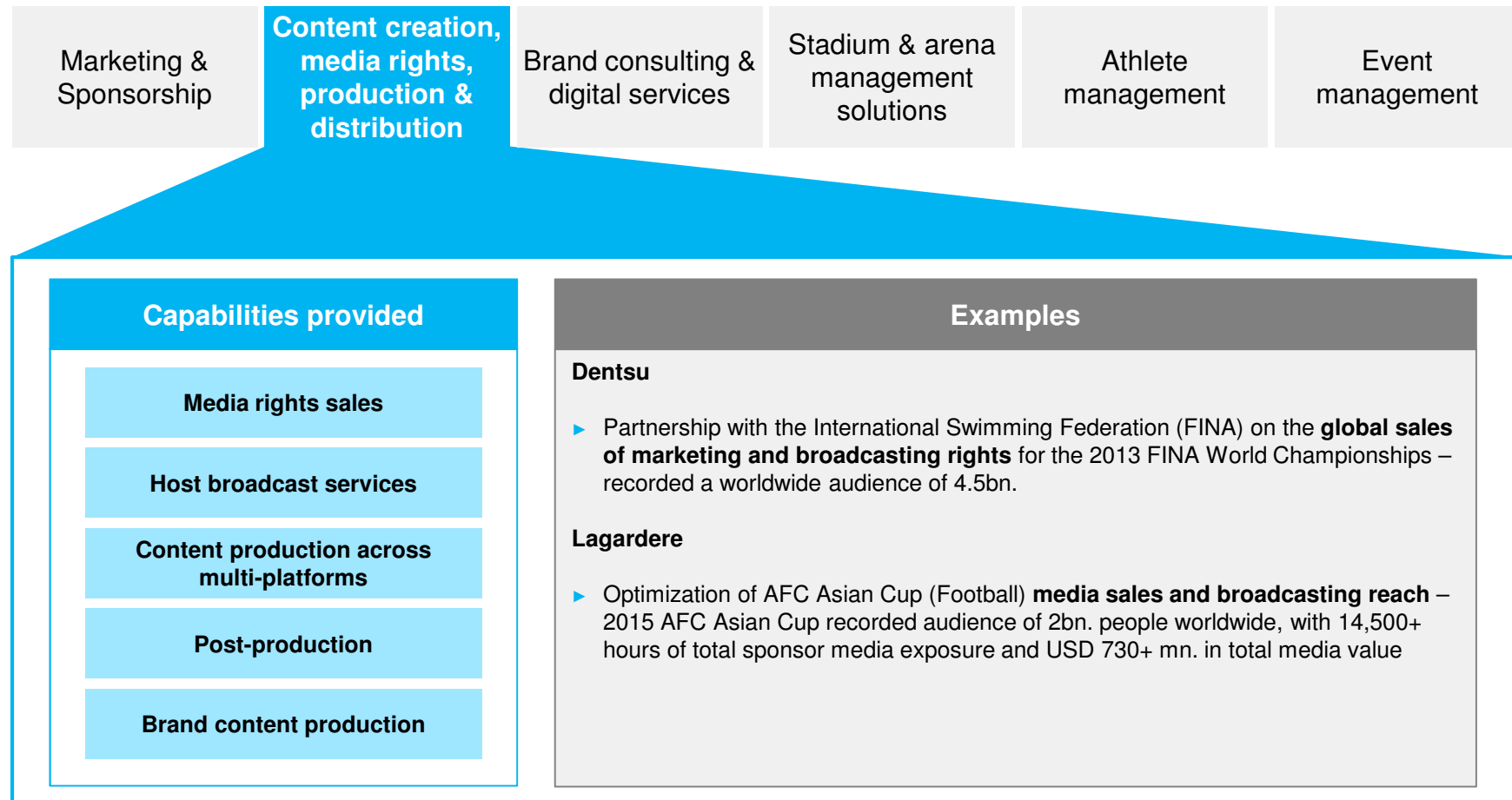
Media Partner					
Marketing & Sponsorship	Content creation, media rights, production & distribution	Brand consulting & digital services	Stadium & arena management solutions	Athlete management	Event management



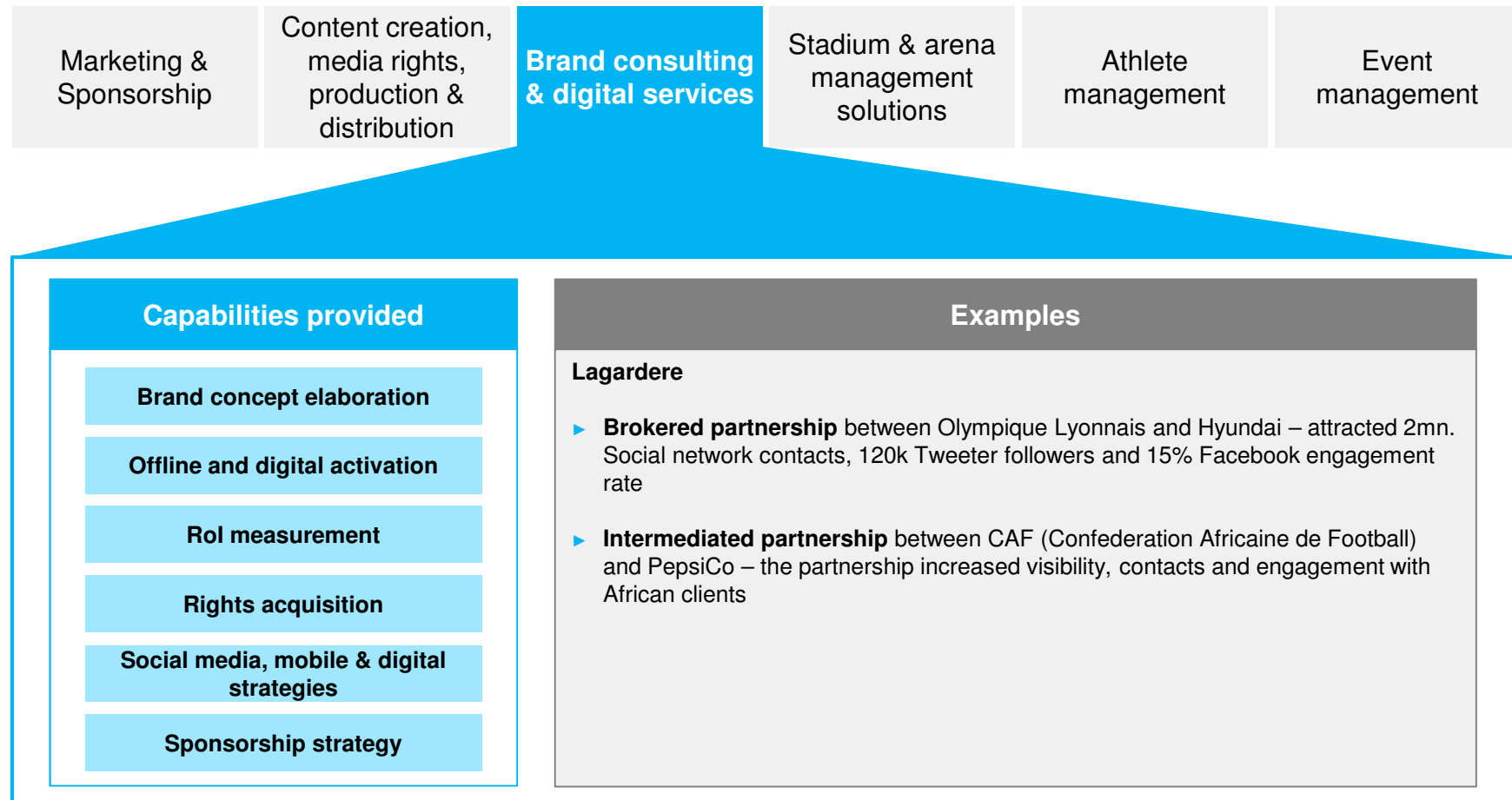
# Sports & Media Agency value chain activities (1/6)



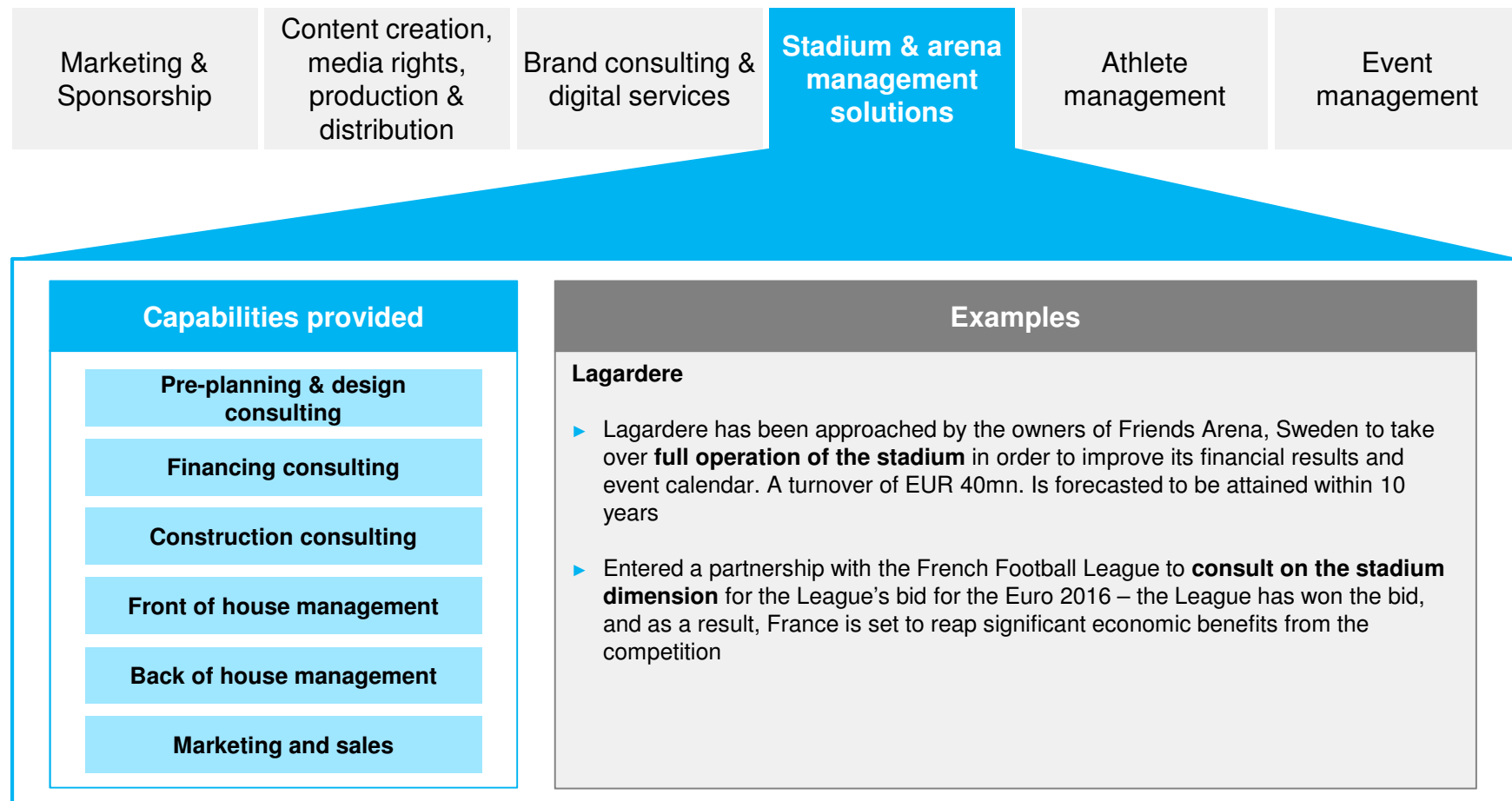
# Sports & Media Agency value chain activities (2/6)



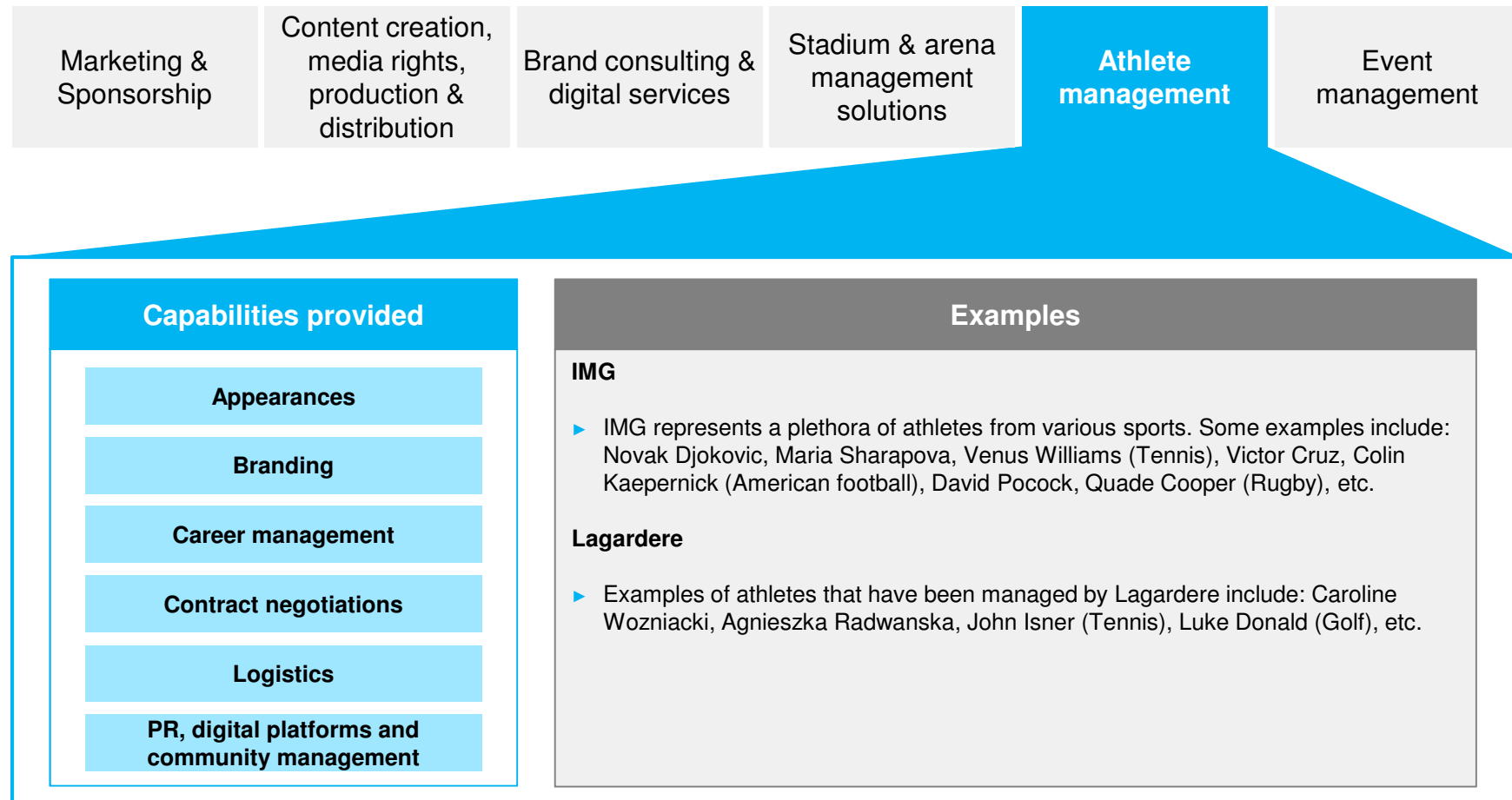
# Sports & Media Agency value chain activities (3/6)



# Sports & Media Agency value chain activities (4/6)

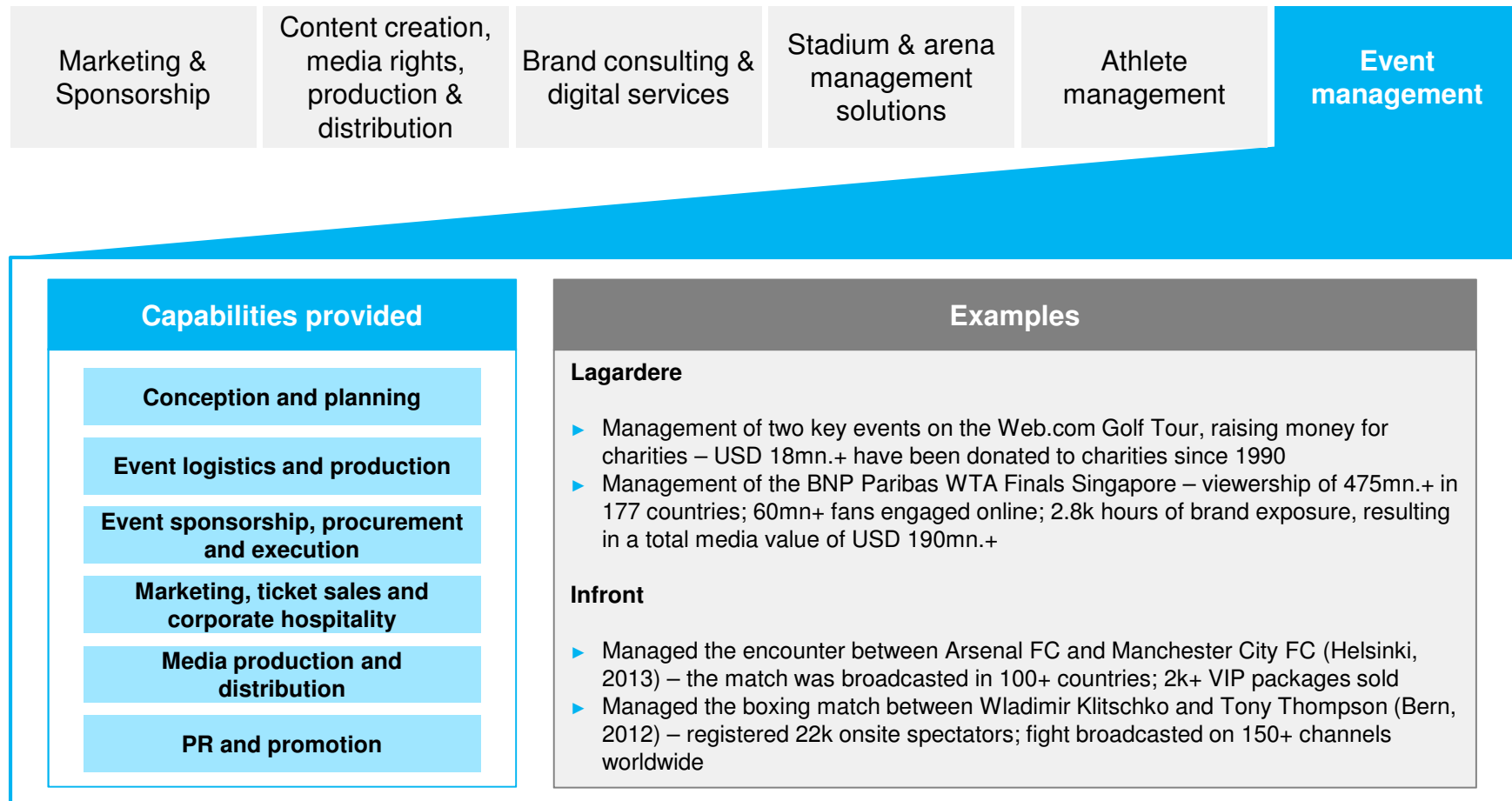


# Sports & Media Agency value chain activities (5/6)

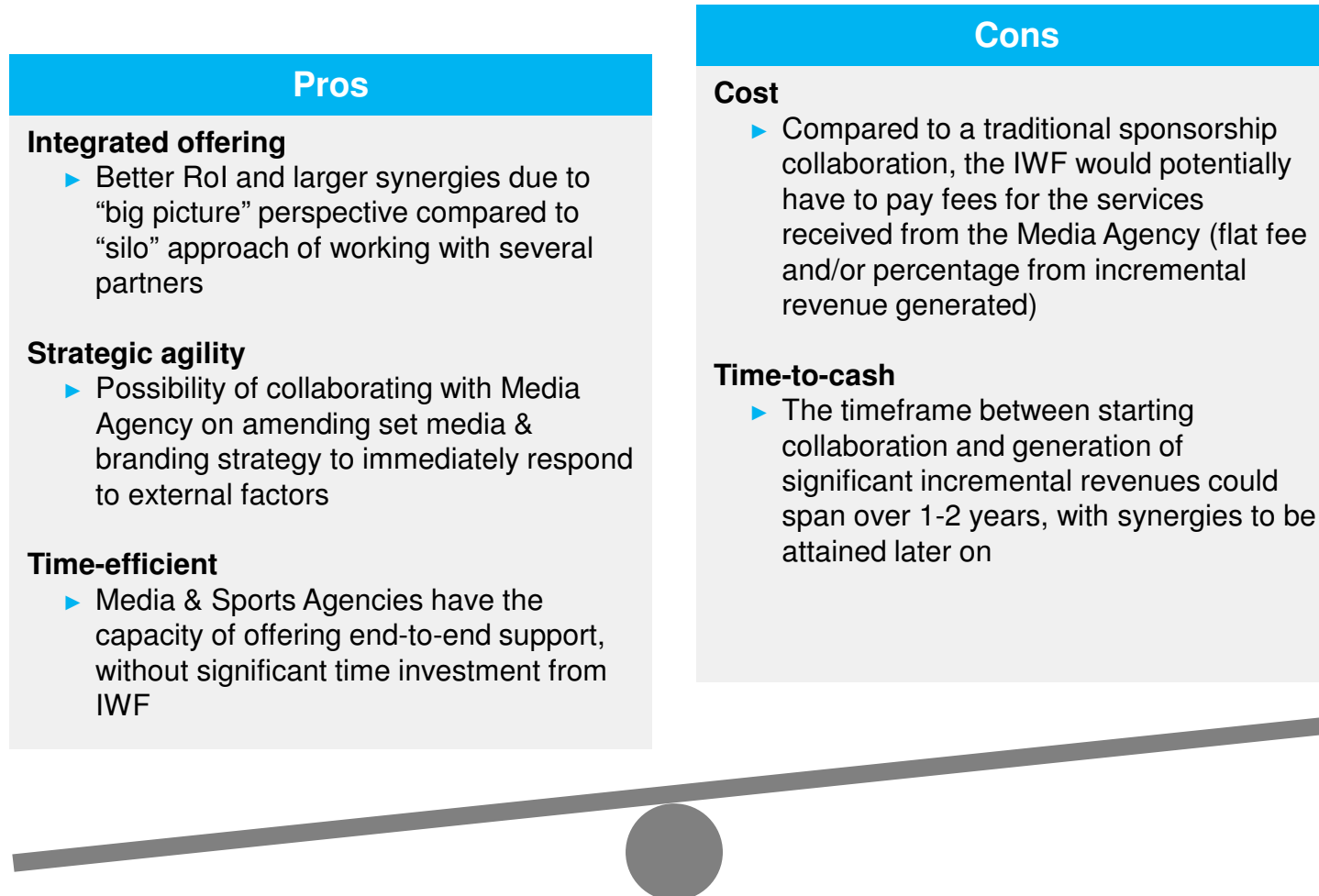
















# Sports & Media Agency value chain activities (6/6)



# Partnering with a Media & Sports Agency could cover most of IWF's current pain points, albeit in a longer time frame



# During the previous years, international sport federations established strategic partnerships with media agencies

Sport Federation	Promoting agency	Facts and figures
 International Association of Athletics Federations		<ul style="list-style-type: none"> <li>Promotion contract for the next 15 years (2014-2029) guaranteed the IAAF <b>11million pounds a year until 2019 and 14 million pounds annually over the following decade.</b></li> </ul>
 International Bobsleigh and Skeleton Federation		<ul style="list-style-type: none"> <li>Over the last eleven years, under Infront's tenure there has been a <b>49 per cent increase in the cumulative audience</b> across all FIBT World Cup disciplines.</li> </ul>
 Asian Football Confederation		<ul style="list-style-type: none"> <li>The new eight-year contract, that will be renewed this year (2015) with Lagardère Sports <b>will surpass the current US\$1 billion agreement</b>, concluded in 2009.</li> </ul>
 Badminton World Federation		<ul style="list-style-type: none"> <li>BWF has appointed IMG Media to handle all media rights for BWF Major Events in all territories, across all five continents in 2011. Since then <b>BWF total income increased by 52%</b> (this includes regular revenues without those related to Olympic games).</li> </ul>
 World Curling Federation		<ul style="list-style-type: none"> <li>3-year partnership agreement concluded in 2008 (contract renewal valid until 2018). <b>Since then sponsorship revenues have doubled.</b></li> <li>The cumulative worldwide audience attracted to the world championships in 2011 made up more than 58 million.</li> </ul>
 International Table Tennis Federation		<ul style="list-style-type: none"> <li>In a <b>multi-year deal worth over \$20 million</b>, TSA will handle all global television rights for ITTF events as well as sponsorship rights for the global tour events.</li> </ul>

# Agenda

## Taxonomy of Partners - Overview

a. Sponsors


b. Media Partners

**c. Sports & Media Agencies profiles**

Backup (Case Studies)

# IMG is the world’s largest independent producer and distributor of sport media

## IMG Company Profile

Overview		Company Key Facts			
	<b>Headquarters</b> 200 5th Avenue, 7th Floor New York, NY 10010	<ul style="list-style-type: none"><li>▶ Owns, manages and represents 600+ sports in 25+ countries</li><li>▶ Relationships with 30+ events and associations in the Asia Pacific region, including the Chinese Basketball Association, IPL Cricket League, Rugby World Cup, CCTV and Beijing Olympics</li><li>▶ Covers sports training, league development, marketing, media and licensing for brands, sports organizations and collegiate institutions</li></ul>			
<b>CEO</b> George Pyne	<b>Employees</b> 1200+ employees, 33 offices				
Clients include		Presence			
					
Marketing & Sponsorship	Content creation, media rights, production & distribution	Brand consulting & digital services	Stadium & arena management solutions	Athlete management	Event management

# Among European sports and media agencies, Lagardere has the strongest global footprint

## Lagardere Sports & Entertainment Company Profile

### Overview



#### Headquarters

4 rue de Presbourg  
75116 Paris, France

#### CEO

Arnaud Lagardère

#### Employees

1600 employees

### Company Key Facts

- ▶ Operations and offices in 25+ countries in the Americas, Europe, Africa, the Middle East, and Asia-Pacific
- ▶ Market leader in football rights management and marketing services for 25 years
- ▶ Partner to 70+ European football clubs and 2 FIFA confederations and manager of a portfolio of 280+ athletes
- ▶ Expertise in sponsorship and corporate hospitality has led to over USD 3 bn. in revenue raised for its clients over the last 4 years

### Clients include



### Presence



Marketing & Sponsorship

Content creation, media rights, production & distribution

Brand consulting & digital services

Stadium & arena management solutions

Athlete management

Event management

# Infront is the leader of full service sports marketing companies in the world

## Infront Sports & Media Company Profile

### Overview



#### Headquarters

Grafenauweg 2 6302 Zug  
Switzerland

#### CEO

Philippe Blattere

#### Employees

900+ employees in over 35 offices

### Company Key Facts

- ▶ Infront delivered 4,100+ event days, including 20+ World Championships in 2015
- ▶ Provides services covering all sports marketing areas in 15+ countries: rights distribution, host broadcast, digital media, brand development, event management and sponsorship
- ▶ With a diversified portfolio of top sports rights, it has successful partnerships with 180+ rights holders in 25 sports and hundreds of sponsor brands and media companies

### Clients include



### Presence



Marketing & Sponsorship

Content creation, media  
rights, production &  
distribution

Brand consulting & digital  
services

Stadium & arena  
management solutions

Athlete management

Event management

# Dentsu Group is the world's largest advertising company

## Dentsu Group Company Profile

### Overview

**dentsu**

#### Headquarters

1-8-1, Higashi-shimbashi  
Minato-ku Tokyo 105-7001, Japan

#### CEO

Tadashi Ishii

#### Employees

47300+ employees

### Company Key Facts

- ▶ Provides a comprehensive range of advertising and marketing services such as on-site promotions, events, PR, media and advertising, to broadcasting rights management, sponsorship sales, merchandising, licensing, and event and athlete representation
- ▶ With business operations in 140+ countries and territories, and Dentsu Group is ranked as the fifth largest advertising company in the world

### Clients include



### Presence



Marketing & Sponsorship

Content creation, media  
rights, production &  
distribution

Brand consulting & digital  
services

Stadium & arena  
management solutions

Athlete management

Event management



# TSA is Asia's global leader in sports content and branding solutions

## TSA Company Profile

### Overview



#### Headquarters

Level 20-1, CP Tower, 11,  
Jalan 16/11 46350 Petaling  
Jaya, Selangor Malaysia

#### CEO

Marcus Luer

#### Employees

100+ employees

### Company Key Facts

- ▶ The core business activities include media rights distribution, TV production, sponsorship/licensing, events management, branded real estate and consulting
- ▶ Over 25 years of experience in Sports, News and Entertainment production
- ▶ The company's strength lies in creating innovative ways to bring sports properties closer to fans and consumers, while generating maximum exposure and demand for its clients' brands

### Clients include



### Presence



Marketing & Sponsorship

Content creation, media  
rights, production &  
distribution

Brand consulting & digital  
services

Stadium & arena  
management solutions

Athlete management

Event management

# Leverage Agency is a full-service sports, entertainment and media marketing agency

## Leverage Agency Company Profile

### Overview



**Headquarters**  
515 Madison Avenue  
14th Floor Suite A, New York

**CEO**  
Benjamin Sturmer

**Employees**  
50+ employees

### Company Key Facts

- ▶ The company has expertise in creating 360° marketing partnerships through branded packaging, sponsorship sales, content creation and distribution, public relations, social media, digital, experimental marketing and asset valuation/ROI analytics
- ▶ It specializes in building corporate partnerships with professional sports leagues, stadiums, television media properties, and national events
- ▶ It has sold over USD 100 mn. worth of sponsorship deals

### Clients include



### Presence



Marketing & Sponsorship

Content creation, media rights, production & distribution

Brand consulting & digital services

Stadium & arena management solutions

Athlete management

Event management

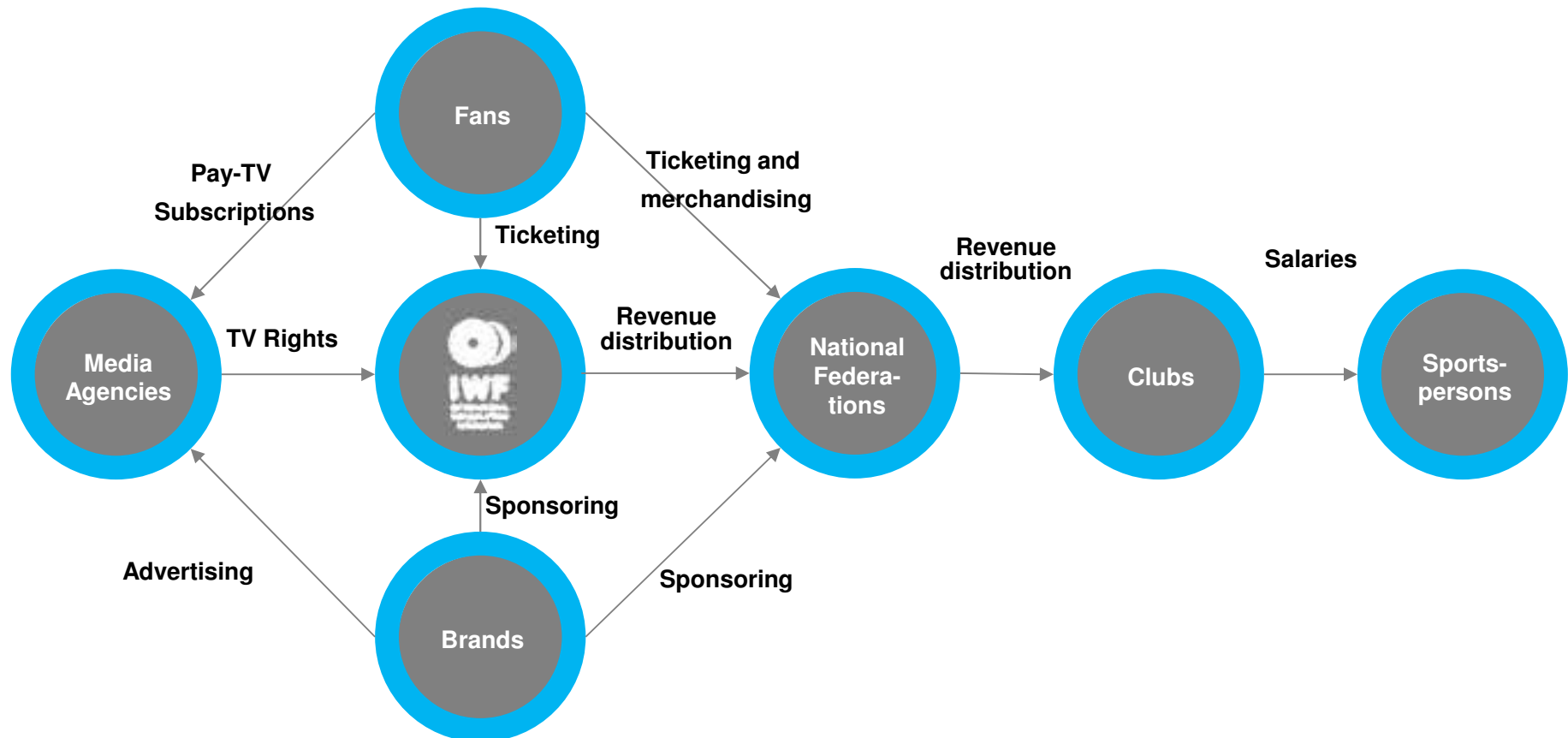
# Agenda

**Taxonomy of Partners - Overview**

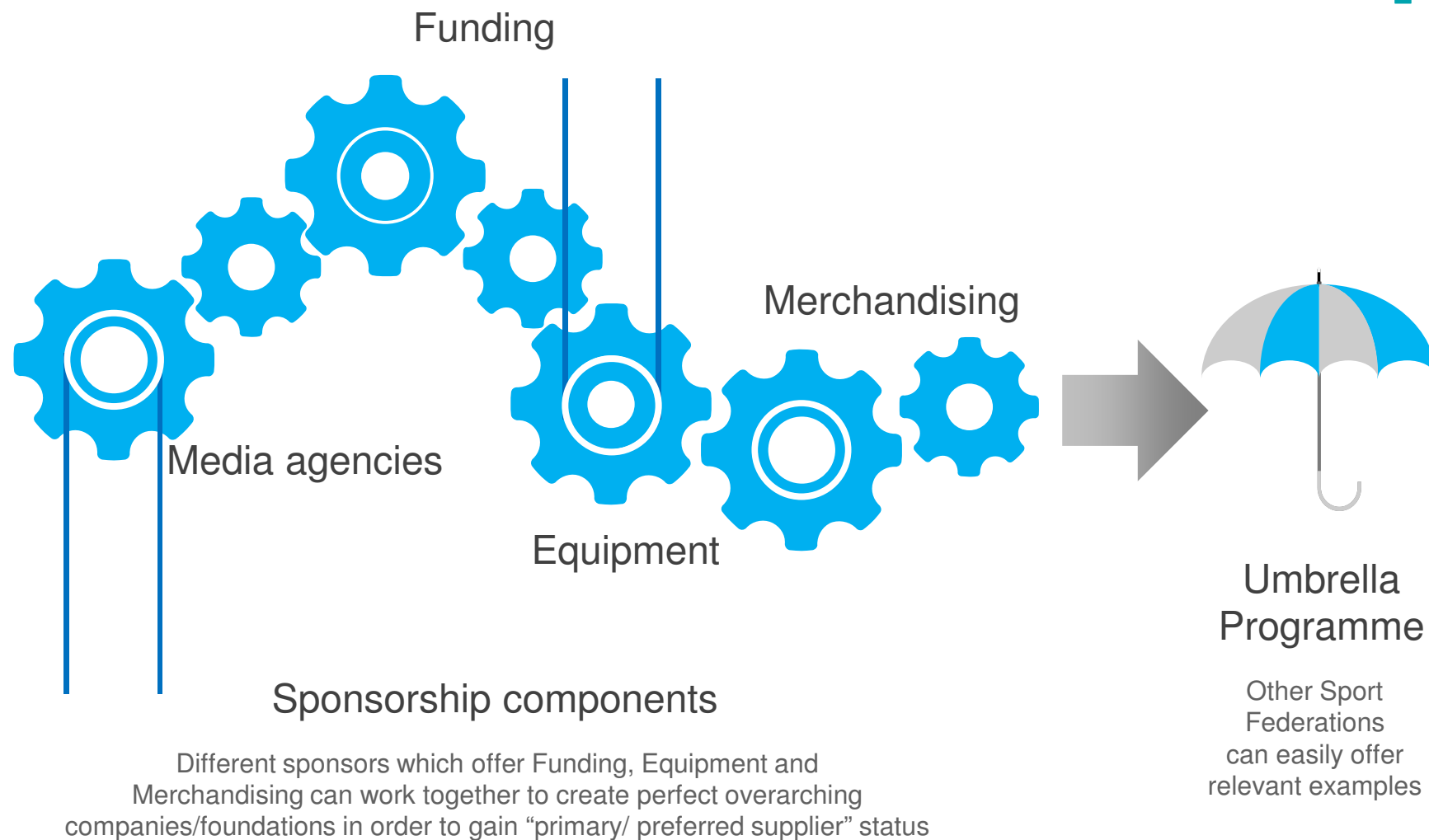
**Backup (Case Studies)**

# Partnering with both Media Agencies and Sponsors could potentially maximize IWF revenues...

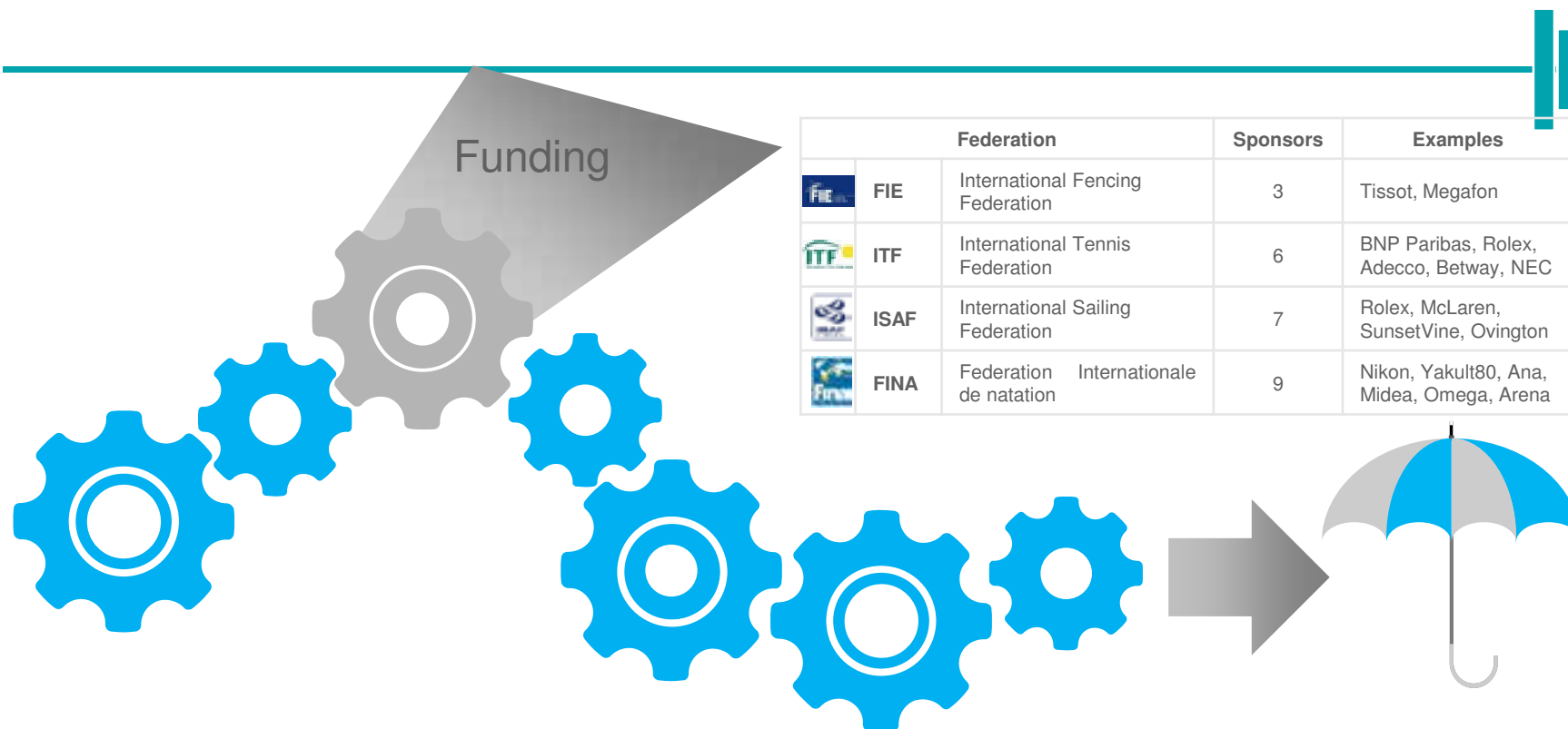
## Overview of the sports ecosystem money flows



# Sponsorship components (Overview)



# Sponsorship components examples – Funding



		Federation	Sponsors	Examples
	FIE	International Fencing Federation	3	Tissot, Megafon
	ITF	International Tennis Federation	6	BNP Paribas, Rolex, Adecco, Betway, NEC
	ISAF	International Sailing Federation	7	Rolex, McLaren, SunsetVine, Ovington
	FINA	Federation Internationale de natation	9	Nikon, Yakult80, Ana, Midea, Omega, Arena








	WA	World Archery	5	Hyundai, Sportoto, Fila, TurkishAirlines, Longines
	BWF	Badminton World Federation	8	RedBull, Chery, Li-Ning, IMG, ESG, Total, MetLife
	IBSF	International Bobsleigh & Skeleton Federation	4	BMW, Gazprom, Omega, Cristall Lefortovo
	ICC	International Cricket Council	11	Oppo, Nissan, MRF Tyres, Emirates, MoneyGram, Pepsi, Reebok, LG, SAP

	IIHF	International Ice Hockey Federation	2	Nike, Tissot
	FIVB	Federation Internationale de Volleyball	4	Honda, Rosetta Stone, DB Schenker, Asics
	UCI	Union Cycliste Internationale	12	Shimano, Tissot, Beko, Mapei, GoPro, Tacx, Pro Gate, Elmoto
	FISA	World Rowing Federation	4	BMW, VEB, Parmigiani Fleurier, Elmec

# Sponsorship components examples – Equipment



Federation		Suppliers	Examples
	<b>FIE</b>	10 Suppliers	Absolute Fencing, Chevalier d'Auvergne, Kabcom, Prieur
	<b>ITF</b>	30 Suppliers/ Manufacturers ( <b>The "ITF Foundation"</b> )	Artengo, Dunlop, Gamma, Slazenger, Sporter, Wilson
	<b>ISAF</b>	9 Suppliers & Partners ( <b>"Connect to Sailing" program</b> )	Mbrands, Icom, Hobbie Cat, LaserPerformance, Spinlock
	<b>FINA</b>	4 Official Suppliers	Duraflex, Malmasten, Mikasa, Nusslie

	<b>WA</b>	5 Official Partners + Special category suppliers: <b>Gold</b> (2 partners), <b>Red</b> (1 partner), <b>Blue</b> (6 partners)	DHL, Hoyt, Easton, Pilla, Axcelsights • Danage, Rinehart • Rosa • Matthewsinc, Krüger, Fivics
	<b>IBSF</b>	3 Official Suppliers/ Partners	Joska Bodenmais, Conceptul, Sport Logistics, Skinfir
	<b>FIVB</b>	4 Suppliers	Mikasa, Jinling Sports, Gerflor, Asics
	<b>UCI</b>	5 Suppliers	ProGate, Elmoto, SantiniSMS The Sufferfest, Tacx
	<b>BWF</b>	15 Approved Shuttles suppliers 26 Approved Flooring suppliers 7 Preferred Equipment suppliers 8 Approved Nets suppliers 12 Approved Net Posts suppliers	Babolat, FZ Forza, Kumpoo Conica, Gerflor, Tinsue, KTL Li-Ning, Kenko, Yonex ApacsSports, Protech, Harrod AFN Sport, Ogawa, Tsumura,
	<b>IIHF</b>	16 Suppliers ( <b>"The Supplier Pool"</b> )	Bauer, Busch, CCM, Easton, Reebok, Tackla, Koho, Graf
	<b>FISA</b>	20 Official suppliers 5 Official Services providers 5 Official Licensing partners	Hudson, Flippi, Croker Cravens, GPS, Supervision Joyforce, RegattaSport, JSA

# Sponsorship case studies (1/3)

## Examples from the Wrestling world

### United World Wrestling

#### **MusclePharm as official sponsor**

- ▶ Nutrión company with all certified products free of banned substances
- ▶ April 2015 signed a major two-year sponsorship deal
- ▶ Focus of the partnership is to improve the education of wrestlers about nutrition and use of supplements
- ▶ The company is proud to be the official sponsor of UWW and believe that their commitments to excellence and quality are aligned

#### **2015 Wrestling World Championships broke viewing records**

- ▶ Active marketing, sponsorships and rights fees helped secure record viewing numbers
- ▶ 3 million visitors to the UWW's official website and over 16 million page views across the six days of competition
- ▶ \$1.1 million in ticket sales
- ▶ ESPN and Fox Sports responsible for the USA and the European Broadcasting Union for Europe (and other regions)

#### **Taishan sponsorship**

- ▶ Important wrestling mat provider signs large deal with the Federation until 2020

#### **Federation hopes to boost TV appeal with new colour mats and uniforms**

- ▶ Reform to improve the appeal of the sport (online and television viewership experience)
- ▶ Traditional wrestling mat colours, yellow and red (since 1972 Olympics) will be replaced with dark blue and orange
- ▶ Wrestling uniform designs in a variety of colours, not just red and blue
- ▶ Referees to wear polo shirt and trousers (instead of suit and tie)
- ▶ "We are taking the steps to ensure that wrestling is attractive to viewers" (Nenad Lalovic, president of UWW)



# Sponsorship case studies (2/3)

## Examples from the Wrestling world

### USA Wrestling

#### Record high for corporate sponsorship combined cash and value-in-kind revenue (2012-2013)

- ▶ Hewlett Packard Financial Services **upgraded the IT components** of the Federation: high-end and top of the line servers, laptops, monitors, docking stations
- ▶ ASICS was the biggest **corporate supporter** on all levels of the sport
- ▶ Liberty Mutual Insurance offered **both cash sponsorship and program activation**:
  - “Responsible Sports” educational platforms and community grant program
  - USA Wrestling website transfer from and to Liberty Mutual site more than doubled its prospected internet traffic goal
  - 4 wrestling clubs won each \$2,500 grants from the company
  - Liberty Mutual provided valuable discounts on insurance to USA Wrestling members

- ▶ Maximized Living, **corporate sponsor** since 2009, offers
  - Financial support
  - Chiropractic services and overall wellness to athletes at all US events
- ▶ Cliff Keen Athletic, **corporate partner**, donated thousands of T-shirts to serve as “wearable billboards” to “Keep Olympic Wrestling”
- ▶ Matguard USA, **corporate sponsor**, leader in the prevention of skin diseases, helps develop more and better tools for coaches, parents and wrestlers to stay free from skin infections
- ▶ NYU Langone Medical Center, Hilton Hotels, BLUEO4® and Tanita round out USA Wrestling’s **corporate sponsors**

# Sponsorship case studies (3/3)

## Example of a company's international reach

### Taishan Sports Industry Group

#### Official Supplier of SportAccord

- ▶ November 2014 - 4-year long commercial partnership to provide all sports equipment and supplies, including surfaces to all SportAccord events,

#### Official Supplier of the Olympic Games

- ▶ Appointed as sole supplier of Mats for Judo, Wrestling and Taekwondo for the 2016 Rio Olympics
- ▶ They were the official supplier of equipment for the 2008 Beijing Olympics and Paralympics

#### Other achievements

- ▶ Sole sports engineering builder in China that first passed the FIFA certification
- ▶ Highest special certification of International Hockey Federation

#### Partnership with The International University Sports Federation

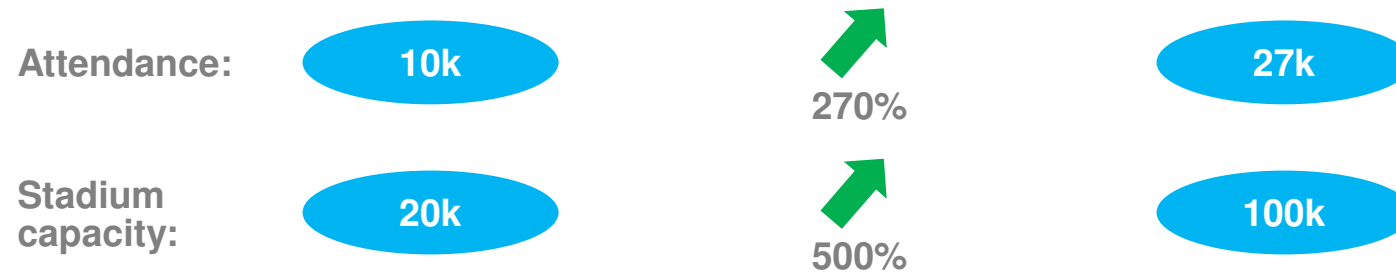
- ▶ November 2015 - 3-year partnership deal to develop joint-projects in:
  - Sports & Innovation (Idong)
  - Sports Equipment & Brand Promotion (FISU Events)
  - Sports & Knowledge (Taishan R&D Centre)
- ▶ The deal involves:
  - Sponsoring for sports in The 2016 and 2018 World University Championships,
  - Sponsoring for sports in The 2017 Summer Universiade in Taipei City
  - Several testing platforms for the physical education department of Universities

# In 2003, cricket organizers shortened the typical game from several days to a few hours

## Changes in game format...

From	To
First-class cricket	Twenty20
<ul style="list-style-type: none"><li>▶ Duration: 3 or more days</li><li>▶ Each team has 2 innings with no maximum “overs”</li><li>▶ Using traditional dressing rooms and long breaks before switching batting teams</li><li>▶ All classic rules apply to cricket matches</li></ul>	<ul style="list-style-type: none"><li>▶ Duration: 3 hours (75-90 min. inning + 10-20 min interval)</li><li>▶ Each team has 1 inning with maximum 20 overs</li><li>▶ Using a “bench” to switch between batting team</li><li>▶ Most of the normal rules apply, but time constraints are imposed</li></ul>

## ...resulted in increased viewership and revenues



### Prizes grew as a result of financial backing

- ▶ **2006** “Stanford 20/20” US\$1,000,000 in prize money
- ▶ **2008** “Stanford Super Series” US\$280,000 prize money
- ▶ **2016** Men’s event will carry a total prize money of \$5.6 million