THE MOST ACTIVE SPONSORS IN THE AUTO CATEGORY: WHO DOES WHAT

Mixed bag of activity among top ten U.S. auto sponsors, as half hold line on spending, others boost budgets.

Toyota Motor Sales, U.S.A, Inc. (“How Toyota Is Using Live Streams To Drive Sponsorship Success” 06.13.16) is the most active U.S. sponsor in the auto category, according to IEG research.

Thirty-four percent of properties with a sponsor in the auto category report a sponsorship with a Toyota brand, according to the research. Ford follows with 19 percent and General Motors is third with 18 percent.

Not surprisingly, sports receive the largest share of spending in the category (64 percent). The rest is spent on festivals (11 percent), causes (11 percent), entertainment (10 percent) and the arts (four percent).

MOST ACTIVE AUTO COMPANIES

<table>
<thead>
<tr>
<th>Auto Company</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>TOYOTA</td>
<td>34%</td>
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<tr>
<td>FORD</td>
<td>19%</td>
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<tr>
<td>GENERAL MOTORS</td>
<td>18%</td>
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<tr>
<td>FIAT CHERYLER</td>
<td>8%</td>
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<td>HONDA</td>
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<td>VOLKSWAGEN</td>
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<td>HYUNDAI</td>
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<td>MERCEDES-BENZ</td>
<td>5%</td>
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<td>KIA</td>
<td>4%</td>
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<td>BMW</td>
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WHERE AUTOMAKERS SPEND MONEY

- **Sports:** 64%
- **Festivals:** 11%
- **Cause:** 11%
- **Entertainment:** 10%
- **Arts:** 4%

Thirty-four percent of U.S.-based properties with a sponsor in the auto category report a sponsorship with a Toyota Motor Sales U.S.A., Inc. brand.
SIDEBAR

WHO DOES WHAT: AUTOMOBILE MANUFACTURERS

Below, details on sponsorship activity for the ten most active U.S. sponsors in the auto category:

**Toyota Motor Sales, U.S.A., Inc.**
Estimated 2015 U.S. sponsorship spend: $195 million-$200 million

Top Properties In Terms Of Spending:

- Joe Gibbs Racing
- Michael Waltrip Racing*
- Toyota Center, Houston
- NASCAR
- New England Patriots

*MWR ceased full-time racing after the 2015 NASCAR season

WHERE TOYOTA SPENDS MONEY

Outside of auto racing and pro sports, Toyota has four national sponsorship platforms: action sports (Dew Tour, Nitro Circus, etc.) endurance sports (Rock ‘n’ Roll Marathon Series, etc.), music festivals (Lollapalooza, Voodoo, etc.) and fishing tournaments (Bassmaster Elite Series, etc.).
The company uses action sports and music festivals to build preference among Millennials, endurance sports to reach women, and fishing tournaments to engage existing and potential truck buyers.

Toyota is doubling down on live streams as a sponsorship activation platform. The automaker this year sponsored first-ever live streams at two music festivals—Sasquatch and Firefly—as well as the live stream for the Stagecoach music festival.

The activations paid off: millions of consumers watched the Stagecoach and Sasquatch streams, with each user spending more than 14 minutes on average with the brand, according to the automaker. Toyota also generated tens of thousands of engagements with its “Music Moves You” Tumblr content for each festival.

On the global front, parent Toyota Motor Corp. recently became the founding partner of the Olympic Channel, the International Olympic Committee’s new digital platform. Toyota in 2015 signed a ten-year deal with the IOC to become a worldwide TOP sponsor.

**Ford Motor Co.**
Estimated 2015 Sponsorship Spend: $155 million-$160 million

Top Properties In Terms Of Spending:

- American Idol
- AT&T Stadium, Dallas
- Roush Fenway Racing
- Professional Bull Riders
- Penske Racing

**WHERE FORD SPENDS MONEY**

Ford has expanded its sponsorship portfolio for 2016 on the experiential and digital marketing fronts.

New ties this year have included June’s Copa America Centenario soccer tournament and more than 25 fairs and festivals on behalf of the Ford Experience Tour, a program the company is using to promote the 2017 Ford Escape, F-150 Raptor and other vehicles.
On the digital front, Ford signed title of The Runner, an interactive reality competition on Verizon’s Go90 streaming platform. The tie-in offers product integration on behalf of the 2017 Ford Escape and brand integration via AOL.com and Xbox.

Ford sponsors The Professional Bull Riders (Built Ford Tough Series), Toby Keith, American Quarter Horse Assn. and other properties on behalf of F-Series trucks. In addition, the company this year is sponsoring more than ten fairs and festivals on behalf of the all-new 2017 Ford Super Duty truck.

Ford sponsors the Tribeca Film Festival presented by AT&T and other arts-centric properties on behalf of its luxury Lincoln brand.

**General Motors Co.**
Estimated 2015 Sponsorship Spend: $150 million-$155 million

Top Properties In Terms Of Spending:

- Hendrick Motorsports
- Major League Baseball
- World Golf Championships—Cadillac Championship
- Walt Disney Parks and Resorts
- National Collegiate Athletic Assn.

WHERE GENERAL MOTORS SPENDS MONEY

General Motors was the only one of the top 10 U.S. auto sponsors to decrease spending in 2015 as a result of dropping its mid-eight-figure NFL partnership.

GM primarily sponsors on behalf of three brands, each of which focuses on one or more marketing platforms: Chevrolet (Major League Baseball and country music), Cadillac (film and fashion); and Buick (college athletics).

Chevy this year renewed its 11-year-old partnership with Major League Baseball and added country music star Luke Bryan as an ambassador for Chevy trucks.

Cadillac over the past two years has expanded its sponsorship portfolio to build relevancy among cultural tastemakers, including a partnership with the Council of Fashion Designers of America. The automaker this year
used the sponsorship to promote Cadillac House, a new branded space on the ground floor of Cadillac’s new global headquarters in New York City.

**Hyundai Motor America**
Estimated 2015 Sponsorship Spend: $80 million-$85 million

Top Properties In Terms Of Spending:

- Hyundai Tournament of Champions PGA Tour tournament
- IMG/24 NCAA Colleges
- GRAMMY Awards
- Houston Texans
- Hyundai Sun Bowl

**WHERE HYUNDAI SPENDS MONEY**

With an expanding vehicle lineup and growing sales, Hyundai is going big with sponsorship.

The company in 2015 replaced General Motors as the official vehicle of the National Football League, adding to a portfolio that includes three other national sponsorship platforms: college sports, music and golf.

Hyundai 2017 will shift its title sponsorship of the PGA Tour’s Tournament of Champions in Hawaii to the Tour’s longtime tournament at the Riviera Country Club in Los Angeles in support its corporate headquarters in nearby Fountain Valley, Calif.

The company will use the golf tournament to promote its new Genesis luxury vehicle.

**Mercedes-Benz USA, LLC**
Estimated 2015 Sponsorship Spend: $55 million-$60 million
Top Properties In Terms Of Spending:

- USTA U.S. Open
- PGA of America
- Mercedes-Benz Superdome, New Orleans
- The Masters
- PGA Championship

WHERE MERCEDES-BENZ SPENDS MONEY

Mercedes-Benz in 2015 dipped its toe further into the naming rights waters with sponsorship of Atlanta’s Mercedes-Benz Stadium. The venue—slated to open in 2017—will be home to the NFL Atlanta Falcons and MLS expansion Atlanta United as well as other sports and entertainment events, including the NCAA Men’s Final Four in 2020.

The announcement followed the July relocation of MBUSA’s corporate headquarters from northern New Jersey to metro Atlanta.

Mercedes-Benz in 2015 dropped its long-running sponsorship of New York Fashion Week.

American Honda Motor Co.
Estimated 2015 Sponsorship Spend: $40 million-$45 million

Top Properties In Terms Of Spending:

- Honda Classic PGA Tour tournament
- Honda Center, Anaheim, Calif.
- National Hockey League
- Disneyland
- Indy Racing League
Honda sponsors a range of properties to reach different audiences, with music and millennials taking center stage.

The company in 2014 built on its long-running involvement in music (Honda Civic Tour, etc.) with the Honda Stage, a digital music program created in conjunction with Live Nation Entertainment, iHeartRadio, YouTube, Vevo and Revolt.

Honda in 2016 extended its Disney partnership, around which it sponsors Disneyland Resort’s Autopia attraction.

**Kia Motors America, Inc.**  
Estimated 2054 Sponsorship Spend: $35 million-$40 million

Top Properties In Terms Of Spending:

- National Basketball Assn.
- New York Rangers
- New York Knicks
- Kia Classic LPGA tournament
- Chicago Bulls
With sports representing nearly 85 percent of its sponsorship portfolio, Kia allocates more money to sports than any other auto company.

Much of that activity is driven by Kia’s partnership with the NBA, a multi-faceted sponsorship that includes the end-of-season Kia Performance Awards, Kia All-Star MVP Award and, new this year, branding on player jerseys at the 2016 All-Star Game.

The automaker sponsors the NBA and 12 teams on behalf of the Kia Optima mid-sized sedan.

Kia leverages its sponsorship of the Billboard Music Awards with the “Kia’s One to Watch” video series. The company uses the sponsorship to promote the Optima and Sportage compact sport utility vehicle.

Kia in 2016 is in its second year as an official sponsor of Telemundo’s el Maestro web series, in which Latin GRAMMY winner Luis Enrique mentors three up-and-coming artists in the music industry. The series features Enrique and the artists reflecting on their music journey while taking “inspirational rides” in the Optima sedan and Soul urban passenger vehicle.

**FCA US LLC**
Estimated 2015 Sponsorship Spend: $25 million-$30 million

Top Properties In Terms Of Spending:

- Pro Rodeo Cowboys Assn.
- X-Games-Winter Games
- Motley Crue “Final Tour”
- Kentucky Derby
- Detroit Pistons
Fiat Chrysler Automobiles in April announced a multi-faceted partnership with NBCUniversal and The Secret Life of Pets on behalf of the all-new 2017 Chrysler Pacifica. The partnership includes multi-episode custom content pieces featuring Late Night host Seth Meyers and other NBCUniversal talent.

FCA sponsors the Academy of Country Music Awards, FLW Outdoors and other Western-centric properties on behalf of Ram Trucks, and the World Surf League, USA Basketball and other properties on behalf of Jeep.

**BMW of North America, LLC**

2015 Sponsorship Spend: $25 million-$30 million

Top Properties In Terms Of Spending:

- BMW Championship PGA Tour tournament
- U.S. Olympic Committee
- Houston Texans
- BMW Golf Cup International
- Golden State Warriors
BWM uses its long-running involvement in golf and the arts to support its premium positioning and brand promise of creativity and innovation.

The company often leverages sponsorship to promote its engineering prowess.

Similar to the bobsled it created for the U.S. Olympic team at the 2014 Sochi Olympics Games, BMW created a racing wheelchair for the U.S. Paralympic Track & Field team in Rio. The carbon fiber wheelchair features a redesigned chassis and aerodynamic engineering.

BMW will give up its Olympic marketing rights in 2017 when Toyota assumes worldwide rights at part of its deal with the International Olympic Committee.

On the local level, BMW this year expanded its involvement in endurance sports with title sponsorship of the Dallas Marathon. BMW is leveraging the December 11 event with a promotion dangling a trip for two and guaranteed reservation for one to the 2017 BMW Berlin Marathon. To enter, consumers must run in the BMW Dallas Marathon, half marathon or Behringer Relay and at least one social run.

**Volkswagen Group of America, Inc.**
Estimated 2015 Sponsorship Spend: $20 million-$25 million

Top Properties In Terms Of Spending:

- US Ski & Snowboard Assn.
- Yankee Stadium
- Museum of Modern Art, New York
- Television Academy (Emmy Awards)
- BNP Paribas Open ATP/WTA tournament
The 2015 emissions scandal appears to have had limited impact on Volkswagen’s sponsorship strategy.

The U.S. unit of Volkswagen AG continues to focus on cycling (USA Cycling, etc.) and soccer (Major League Soccer), the latter of which supports corporate’s long-running involvement in the sport.

Volkswagen sponsors the USSA on behalf of the Audi brand.
ABOUT IEG AND ESP PROPERTIES

IEG has shaped and defined sponsorship over three decades. It is the globally recognized source for industry insights, trends, training and events via sponsorship.com, its annual conference, online publications, trend reports, surveys and webinars.

IEG is part of ESP Properties, a WPP company. As a commercial and creative advisor for rightsholders, ESP Properties helps organizations unlock greater value from their audiences and brand partnerships.

Our consulting team assesses and advises how to grow the value of rightsholders’ commercial programs. We do this through a full range of services across data, digital and content development to better understand audiences and create more relevant ways to engage with them. This provides brand partners with new ways to connect with communities of fans and followers, growing the potential value of commercial partnerships.

Our sales team provides partnership strategy and sales representation to the world’s most active sponsors, within and beyond the WPP network of brand clients. Through WPP we have extensive contacts and deep insights into what it takes to create successful partnerships.

For more information about IEG and the sponsorship industry, please visit www.sponsorship.com, www.espglobal.com, or call +1 312 944 1727.