

**Best Use of Research and Evaluation in a Sponsorship Campaign**  
**Barclays and iris Worldwide**

Criteria	Barclays and iris Worldwide
<b>Sponsorship scope and objectives</b>	Barclays Premier League – title sponsorship objectives: 1. Drive brand engagement with Customers & Clients 2. Increase levels of Colleague engagement and Pride in the organisation 3. Drive revenue across the business Global property, focussed on core markets in UK, North East US and Africa.
<b>Aim of the evaluation</b>	To evaluate the value of the sponsorship against corporate objectives – set out in the Barclays Balanced Scorecard – and to identify key opportunities for development
<b>Scope of evaluation activities</b>	Evaluation activity took the form of engaging research partners, internal focus groups and surveys, digital analysis, interviewing key stakeholders, AVE research, commercial analysis, econometric modelling, brand tracking.
<b>Evaluation design considerations</b>	Give a holistic view of performance aligned to corporate objectives. Take into account the varying importance of different objectives. Don't just evaluate impact – diagnose how it can be improved. Allow comparison across different metrics and with other sponsorships.
<b>Brief outline of data/collected/generated</b>	The data collected split into two categories, Tangible data and Subjective input. An outline of the split of data sources is included on the framework to show the construct of the evaluation. The tangible data is data that has been formally researched and collected, while the subjective input distilled anecdotal feedback from key stakeholders through a series of consistent questions. This ensured that we didn't completely ignore aspects which we couldn't measure with total rigour.
<b>Conclusions drawn and actions taken</b>	The evaluation dial helped to shape the future direction of sponsorship, identifying key opportunities for development. Greater focus is now being given to non-traditional sponsorship focuses such as colleagues and Citizenship.

**[Aim of the evaluation]**

This submission is across Barclay's portfolio of sponsorship properties, but focuses on the Barclays Premier League. Barclays has created a Balanced Scorecard that defines what the organisation needs to achieve in order to become the 'Go-To' bank. The Balanced Scorecard clearly defines what success looks like across the 5Cs of:

- Customer & Client, Colleague, Citizenship, Conduct, and Company

The aim of the evaluation was to assess the value which the sponsorship provides against each of those categories and to identify key opportunities for development.

**[Sponsorship scope and objectives]**

To prove the value of sponsorship to the organisation, the evaluation is focused on how sponsorship contributes to the corporate level goals set out in the Balanced Scorecard. In partnership with iris Worldwide, and through the use of iris' sponsorship evaluation framework, Barclays defined the focus areas against the 5 categories in the Balanced Scorecard, and assigned a weighting to each category. Using the Premier League as an example, Barclays' key objectives of the sponsorship are;

1. Drive brand engagement with Customers & Clients
2. Increase levels of Colleague engagement and Pride in the organisation
3. Drive revenue across the business

With those objectives in mind, the following structure was defined to evaluate the objectives of the sponsorship;

- 30% Customer & Client, 20% Colleague, 10% Citizenship, 10% Conduct, 30% Company [Figure 1.1]

**[Scope of evaluation activities]**

By using the framework, the scope of the evaluation was the sponsorship as a whole over the previous year. Under each of the 5C categories are relevant evaluation metrics, outlined in Figure 1.2. These metrics were then weighted to reflect their differing levels of importance for the Premier League sponsorship. Taking such a step ensured that the sponsorship was evaluated against what Barclays was trying to achieve with it - it was not 'penalised' for failing to perform against irrelevant evaluation criteria, as shown in Figure 1.3.

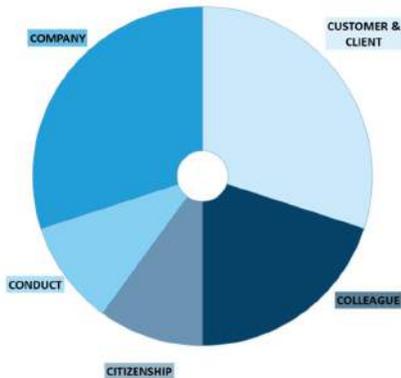


Figure 1.1 | Objective setting

METRIC	
CUSTOMER & CLIENT	EXPOSURE
	AUDIENCE FIT
	PARTICIPATION
	HOSPITALITY
	AWARENESS
COLLEAGUE	BRAND ENGAGEMENT
	PRIDE
CITIZENSHIP	PARTICIPATION
	EXPOSURE
CONDUCT	INITIATIVES
	IMPACT
	APPROPRIATENESS
COMPANY	BRAND VALUES
	BRAND PURPOSE
	EXCLUSIVITY
	TANGIBLE ASSETS
COMPANY	PRODUCT INITIATIVES
	HOSPITALITY VALUE
	DI RECT REVENUE
	INDIRECT POTENTIAL REVENUE
	MEDIA VALUE

Figure 1.2 | Evaluation metrics



Figure 1.3 | Evaluation metrics aligned to objectives

**[Evaluation design considerations]**

The initial consideration of building the framework was that the evaluation needed to be diagnostic and not just a review of the sponsorship’s impact. By including activity metrics (such as hospitality and customer participation) alongside business impact metrics (such as direct revenue), it is possible to identify what must be tangibly done so that the sponsorship can support the business more effectively.

Evaluation without context is only half of the story. When you get a score of 7, is that good? It is only possible to evaluate properly when performance is shown in context, for example is the score 7/10, 7/100 or 7/1,000? Upper-limits were set across all evaluation metrics, either via Barclays' internal targets or from iris' proprietary database of sponsorship performance data.

By indexing performance against a target or benchmark, the model was able to give a score out of 100 for each metric. This means that scores can be compared and makes interpreting relative performance clearer; the evaluation dial demonstrates the performance and the importance of the metric in a concise output.

Figure 1.4 displays the evaluation output for one of Barclays' sponsorship properties. The width of the segments shows the importance of that metric to the objectives of the sponsorship. The extent to which it is filled shows how the metric performed against the target or benchmark. Where white space exists, there is an opportunity for further development.

Performance has been capped at 100 (where performance exceeds the target or the external benchmark) to ensure that the evaluation is not biased by a single metric (excluding the ROI calculation that sits outside of the dial).

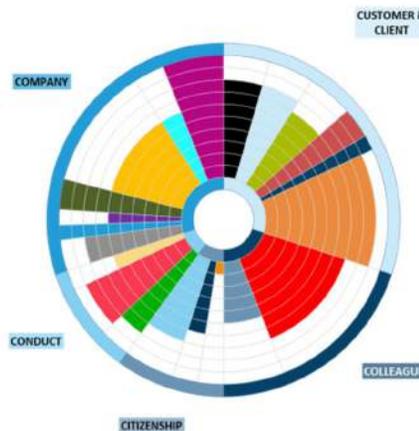


Figure 1.4 | iris sponsorship evaluation dial

**[Brief outline of data collected/generated]**

Barclays already collected large amounts of data on their major sponsorships, particularly for the Premier League. However, data was inconsistent across the portfolio and the previous evaluation focused on what data was held, ignoring any gaps entirely.



Figure 1.5 | Independent research

For the Premier League, tangible data was collected for over 80% of metrics, to show the impact of the sponsorship on the key areas of;

- Customer & Client = Audience figures, participation figures, hospitality attendance, sponsorship awareness and association, consumer brand engagement
- Colleague = participation figures, sponsorship pride
- Citizenship = Volume of initiatives, volume of people impacted, consumer perception of Barclays’ community impact
- Conduct = consumer perception of Barclays’ alignment to the Purpose and Values
- Company = Econometric modelling, attribution modelling, market valuation, AVE

This was collected from a wide variety of sources, most notably media and brand-tracking conducted by Kantar and an internal colleague survey run by Barclays directly. Where tangible data could not be collected (for example, in evaluating the exclusivity of the property), subjective input was distilled to complete the data collection, giving a view on performance across all relevant evaluation metrics. The framework consolidated all of the data and provided a clear and simple report on the sponsorship.

**[Conclusions drawn and actions taken]**

The dial can be used to understand both areas of strength and weakness, and to focus strategic direction by allocating time and effort to the wider segments that have the most white space.



Figure 1.6 | Scores at 5C level

The evaluation demonstrated that Barclays was performing strongly against traditional sponsorship focuses such as Customer & Client and Company. However, it identified that there was further opportunity for development in terms of Colleagues and Citizenship. As a result, the sponsorship team is currently considering how colleagues can be more closely involved in the sponsorship (in order to drive pride) and whether it can be more closely integrated with existing Citizenship initiatives and activities.

More broadly, the evaluation tool gives Barclays the ability to aggregate sponsorship performance across the portfolio to understand if it is delivering against corporate objectives. The evaluation process is the same across the portfolio. However, the output is bespoke to each sponsorship and its associated objectives (as shown in Figure 1.7).

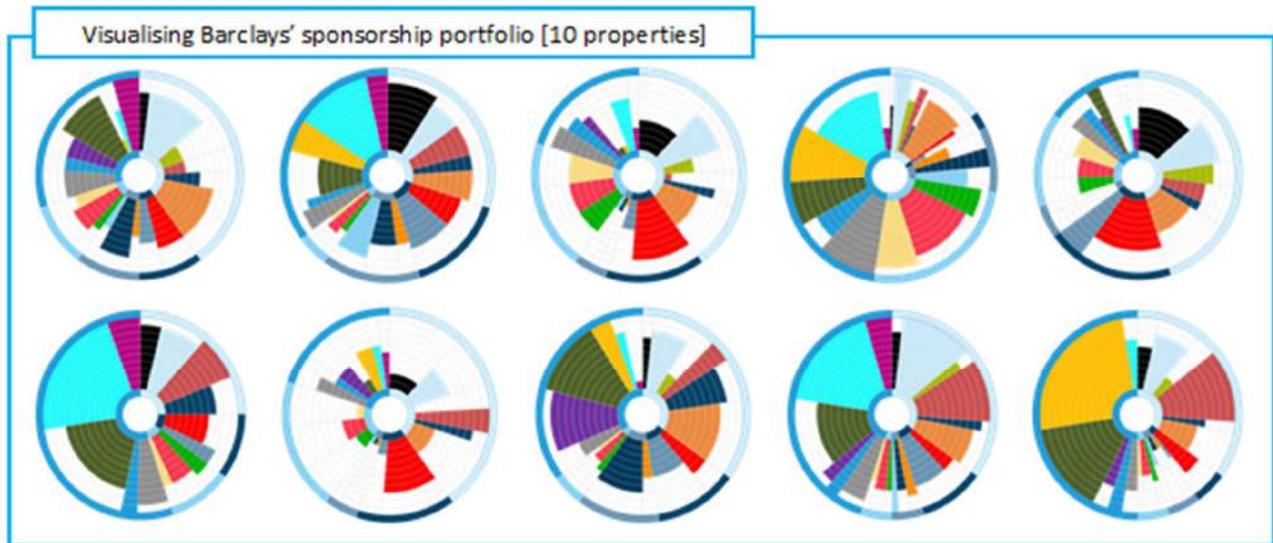


Figure 1.7 | Objectives and performance across a portfolio

The framework has created a common language throughout Barclays in terms of sponsorship evaluation, and this has helped clarify objectives and aid in strategic planning. Having visibility of the properties' strengths and weaknesses has helped to shape activation plans and enable Barclays to articulate their goals and to define success.

In summary, the evaluation framework has given Barclays a tool that helps across a broad range of business areas:

- Sponsorship strategy development
- Sponsorship objective setting
- Cross organisation knowledge sharing
- Common sponsorship language
- Portfolio level discussions
- Contract negotiations
- Sponsorship property review & selection
- Defined process and roles & responsibilities
- Optimisation and planning tool
- Structure for on-going review and development
- Stronger partnerships with rights holders

The framework has already helped crystallise the objectives for each of Barclays' sponsorships, and driven change in the strategic direction of some of the properties. Activations have shifted from areas of "maximum" performance and have been focused on the white space of the dial i.e. the previously under nourished areas of the sponsorship.