

NHL Venues in Canada:

STATE OF THE NATION

October 2023

CONSUMER-BACKED INSIGHTS ON THE STATE OF MAJOR NAMING RIGHTS' DEAL PERFORMANCE IN CANADA.

- 00. Introduction
- 01. At a glance
- 02. Deep dive on Canada's seven NHL venues
- 03. GTA spotlight
- 04. What Canadians value in a venue
- 05. Appendix: About SponsorPulse

INTRODUCTION

00.00

53% of sponsorship professionals agree that **valuing assets** is one of the biggest challenges they face.

Source: www.stateofsponsorship.com



SPORTS

Crypto.com buys naming rights to Lakers' Staples Center in a \$700 million deal

PUBLISHED WED, NOV 17 2021 7:58 AM EST | UPDATED WED, NOV 17 2021 12:22 PM EST



Business

Scotiabank pays big for arena naming rights, but did it break the bank?



Brand exposure sure to benefit, but it will take more than that for it to pay off in profits

[Pete Evans](#) · CBC News · Posted: Sep 04, 2017 5:00 AM ET | Last Updated: September 4, 2017

The fans are back. The deals are **bigger** than ever.

Premiere venues across the world have now been packed after the disruption of COVID. **But what drives the quality of a venue in the minds of Canadians? And what about the name on the side of the building?**

Naming rights deals north and south of the border are getting more dollars – and attention – than ever before.

Let's dive in on whether these headline making arrangements are delivering the benefit to the brands that put their names on these buildings.

Naming rights deals covered in this report



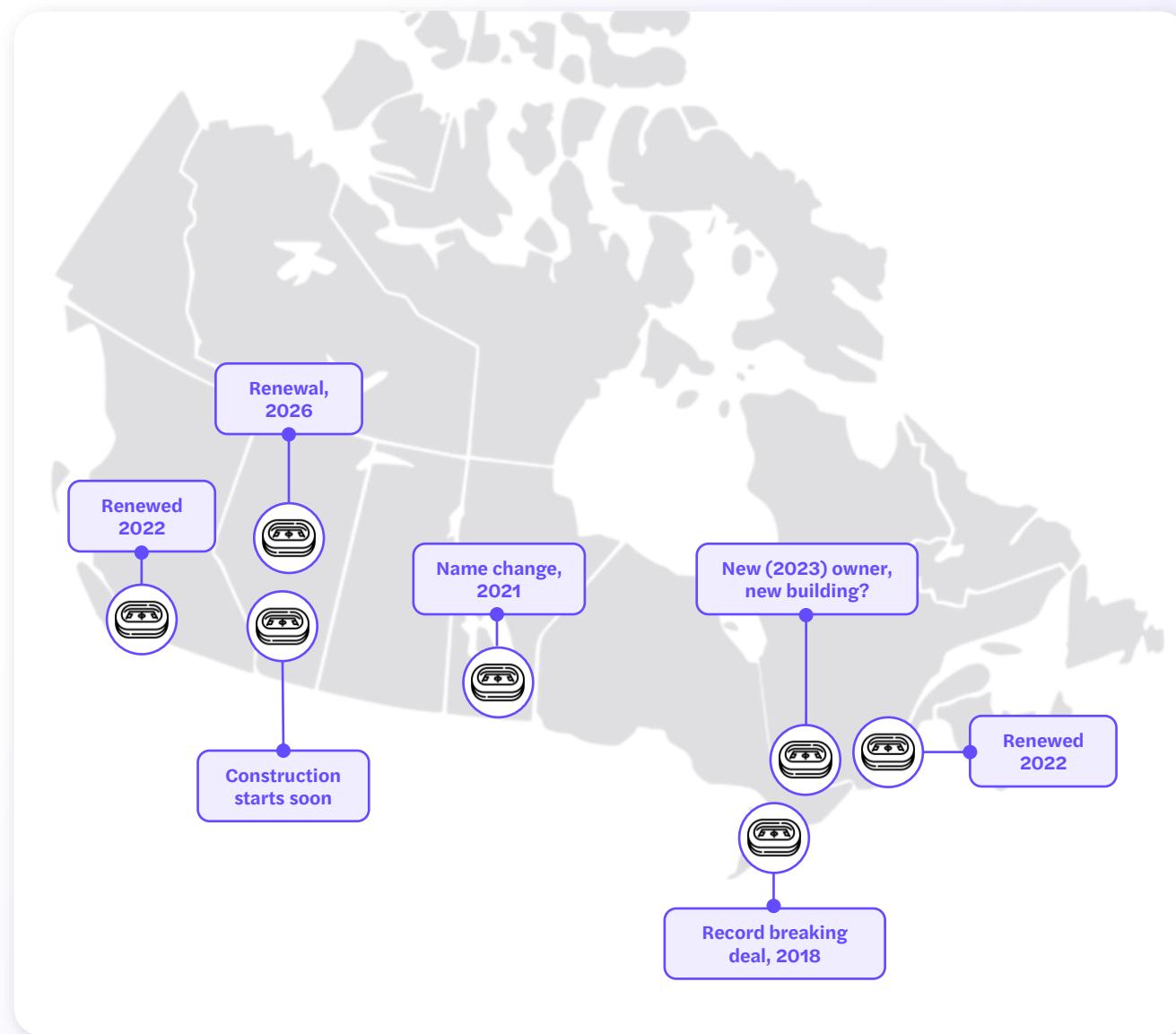
With additional perspective on Toronto area venues



AT A GLANCE

01.

We're in a very active period for **high-profile** naming rights opportunities, with billions of dollars at play.



But what about the value of these record-breaking deals?

- Do they reach consumers **nationally**?
- Do name changes **confuse** consumers and reduce **impact for brands**?
- Which venues do consumers stubbornly **refuse** to call by their new names?

Three **key findings** we'll explore in this report

1

Rogers' dominance is clear. The brand boasts the **#1** Favourite Venue in Canada (Rogers Centre), as well as the **#1** (Edmonton) and **#2** (Vancouver) performing NHL naming rights deals.

2

Canadians value **comfort** and **convenience of location** above all else when it comes to a venue – no doubt why Rogers Centre recently got a fan-experience makeover, and there's discussion of the Ottawa Senators moving closer to the city's core.

3

With potentially **two new NHL buildings** on the horizon, the importance of establishing a name as early as possible is clear.

Generic & past names continue to cloud the connection with the current naming partner at Canadian venues, especially in Winnipeg and Calgary.

Though there's evidence (Ottawa, Vancouver, Toronto) that **continuity** can overcome these challenges.

CANADA'S NHL ARENA VENUES: NAMING RIGHTS IMPACT

02.

Four KPI's for a consumer-driven evaluation of naming rights outcomes

Name Recognition in Local Market

What % of local residents name the branded venue name when asked where the local team(s) play their home games?

Name Recognition Nationally

What % of Canadians across the country cite the branded venue name?

Name Utilization

What % of local market residents *a/ways* use the current name with the brand included?

Noise

Is there misattribution to other brands, or past names, that still have significant equity?

Ranking the seven Canadian NHL venue's naming rights performance

1

 **ROGERS PLACE**

With its name announced three years prior to opening, there's been nothing but clear air for Rogers to establish its connection with the building and the Oilers. A clear #1 performer.

2


**ROGERS
ARENA**

With the name established for well over a decade at this point, Rogers Arena demonstrates strong performance and national reach – tied for 1st in terms of national recognition of the team's home venue's name.

3

 **CANADIAN TIRE CENTRE**

Despite several past names, the now-ten-year-old arrangement shows what's possible as the past brands and names fade from the local community's memory.

4

**Scotiabank
Arena**

This record-breaking deal has excellent recognition nationally, but only five years past its name change, there's still plenty of equity in "ACC" in the local market – and misattribution to Rogers from casual fans.

5

**Centre
Bell**

Strong recognition nationally, but somewhat softer in the local market, where the power of Molson remains in the foreground of consumer's minds.

6


**Scotiabank
Saddledome**

The generic name "Saddledome" (without Scotiabank) has presented challenge in consumer uptake on Scotiabank's ownership of the asset – but a new building will be ready soon.

7

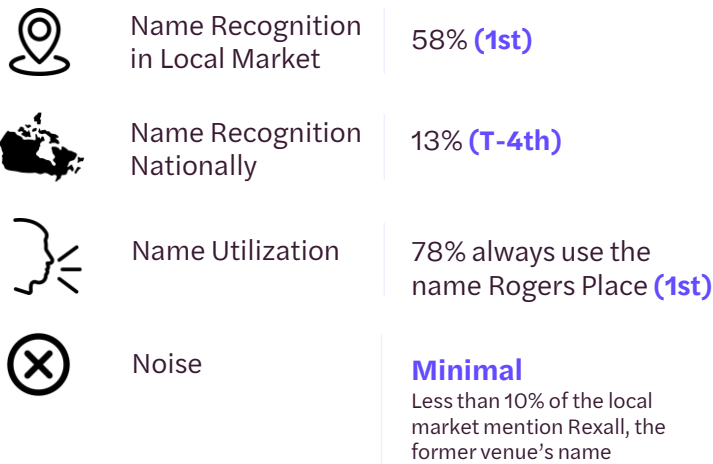
canada life centre

With a modest national footprint and very recent name change, it will take some time for relatively new player in the space (Canada Life) to establish a firm hold in the minds of Jets fans and national consumers.

Naming Rights Performance

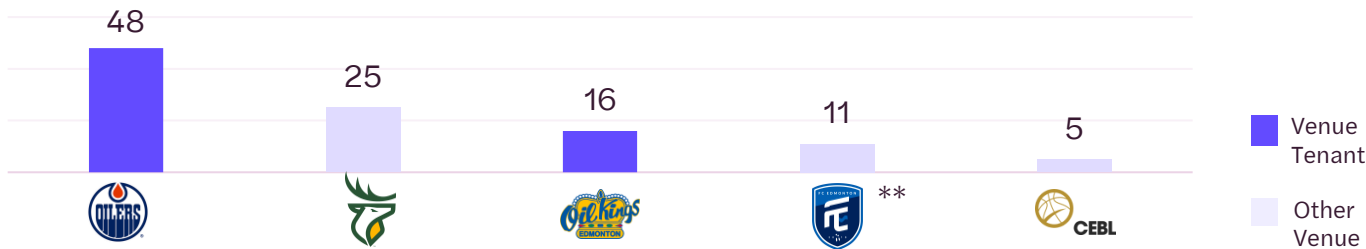


KPI Outcomes



Location	Edmonton, AB	Past Names	None		
Metro Area Population	1.5MM	Capacity	18,347	Opened	2016
				Named Since	2016, 10-year deal
				Published Deal Values	"\$1 million annually is not even in the ballpark."*

Sponsorship Opportunity Score (Key Tenants)



Results among Alberta general population, 13-64. Opportunity score combines multiple metrics (engagement, intensity, momentum, passion, excitement, and impact on sponsors) into one number that represents the sponsorship potential of a property.
** Did not play in 2023

Naming Rights Performance



Rank **among**
NHL venues
in Canada

#2

KPI Outcomes



Name Recognition
in Local Market 44% **(3rd)**



Name Recognition
Nationally 43% **(T-1st)**



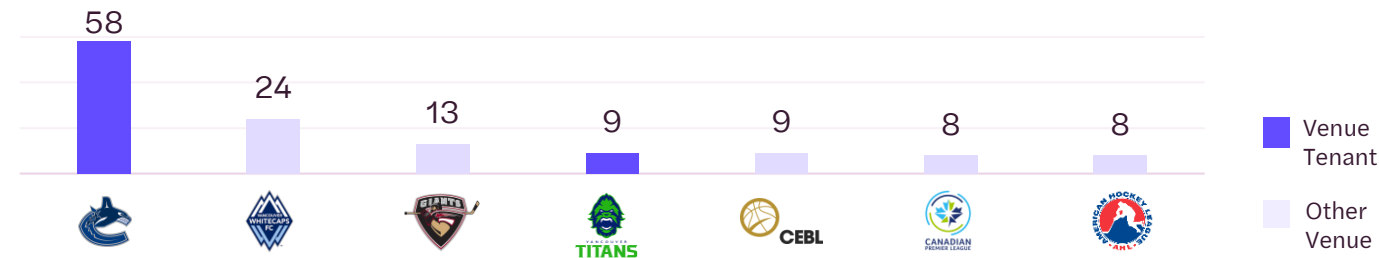
Name Utilization 64% always use the
name Rogers Arena **(2nd)**



Noise **Minimal**
General Motors (former name,
2010) is associated by 5% of
local market

Location	Vancouver, BC		Past Names	General Motors Place	
Metro Area Population	2.5MM	Capacity	19,700	Opened	1995
				Named Since	2010 Renewed in 2022 until 2033
				Published Deal Values	Previous partner (GM): 20 years \$18.5MM*

Sponsorship Opportunity Score (Key Tenants)



Results among B.C. general population, 13-64. Opportunity score combines multiple metrics (engagement, intensity, momentum, passion, excitement, and impact on sponsors) into one number that represents the sponsorship potential of a property.

Naming Rights Performance



Rank **among**
NHL venues
in Canada

#3

KPI Outcomes



Name Recognition
in Local Market 47% **(3rd)**



Name Recognition
Nationally 13% **(T-4th)**



Name Utilization 40% always use the
name Canadian Tire
Centre **(T-4th)**



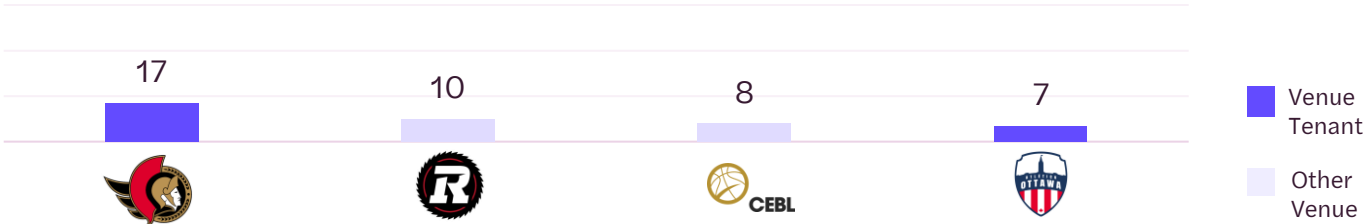
Noise

Minimal

Despite several past names,
Canadian Tire is far and away
the top brand mentioned

Location	Ottawa, ON		Past Names	Scotiabank Place, Corel Centre, Palladium	
Metro Area Population	Capacity	Opened	Named Since	Published Deal Values	
1.4MM	18,652	1996	2013, original eight-year term with renewals	“\$1.5-\$2MM per season”*	

Sponsorship Opportunity Score (Key Tenants)



Results among Ontario general population, 13-64. Opportunity score combines multiple metrics (engagement, intensity, momentum, passion, excitement, and impact on sponsors) into one number that represents the sponsorship potential of a property.

Naming Rights Performance



Rank **among**
NHL venues
in Canada

#4

KPI Outcomes



Name Recognition
in Local Market 33% **(4th)**



Name Recognition
Nationally 17% **(T-1st)**



Name Utilization 37% always use the
name Scotiabank
Arena **(T-5th)**



Noise

Notable

Both Rogers (18% misattribution)
and former name (Air
Canada/ACC – 11%) show equity

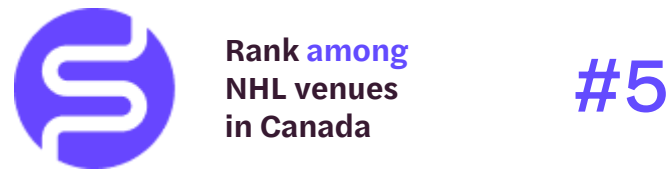
Location	Toronto, ON		Past Names	Air Canada Centre	
Metro Area Population	5.9MM	Capacity	20,511	Opened	1999
				Named Since	2018, 20-year deal
				Published Deal Values	\$800MM*

Sponsorship Opportunity Score (Key Tenants)



Results among Ontario general population, 13-64. Opportunity score combines multiple metrics (engagement, intensity, momentum, passion, excitement, and impact on sponsors) into one number that represents the sponsorship potential of a property.

Naming Rights Performance

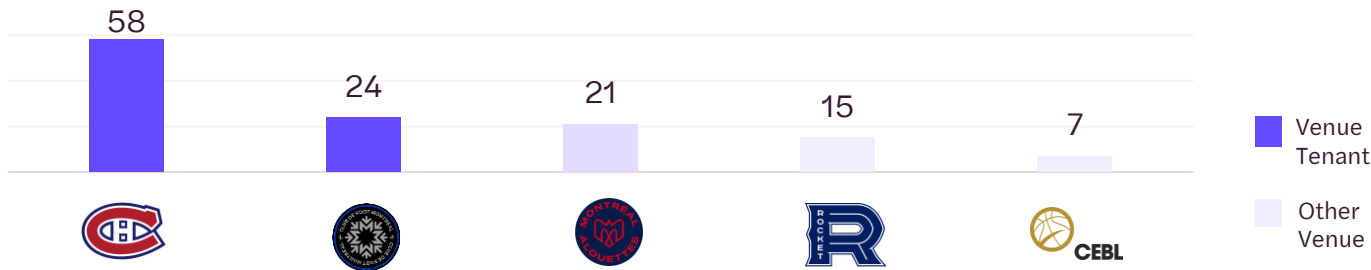


KPI Outcomes

	Name Recognition in Local Market	23% (7th)
	Name Recognition Nationally	17% (T-1st)
	Name Utilization	38% always use the name Centre Bell (T-5th)
	Noise	Notable Molson (12%) is still mentioned by nearly half as many who mention Bell

Location	Montreal, QC	Past Names	Molson Centre
Metro Area Population	4.0MM	Capacity	21,105
		Opened	1996
		Named Since	2002, 20-year deal, renewed through 2028
		Published Deal Values	“ \$100 million US” (original deal)*

Sponsorship Opportunity Score (Key Tenants)



Results among Quebec general population, 13-64. Opportunity score combines multiple metrics (engagement, intensity, momentum, passion, excitement, and impact on sponsors) into one number that represents the sponsorship potential of a property.



Naming Rights Performance



Rank **among**
NHL venues
in Canada

#6

KPI Outcomes



Name Recognition
in Local Market 28% **(5th)**



Name Recognition
Nationally 11% **(6th)**



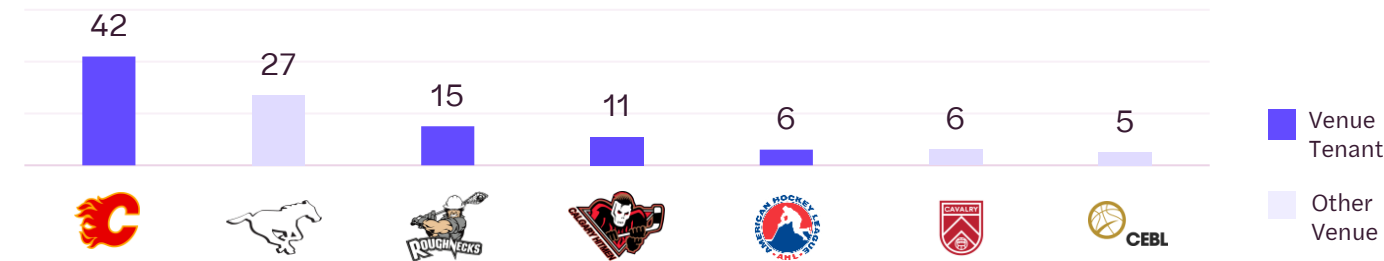
Name Utilization 44% always use the
name Scotiabank
Saddledome **(3rd)**



Noise **Notable**
18% local residents simply
refer to it as Saddledome,
without Scotiabank

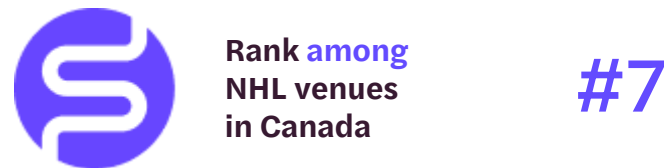
Location	Calgary, AB		Past Names	Olympic Saddledome, Canadian Airlines Saddledome, Pengrowth Saddledome	
Metro Area Population	Capacity	Opened	Named Since	Published Deal Values	
1.3MM	19,289	1983	2010	None	

Sponsorship Opportunity Score (Key Tenants)



Results among Alberta general population, 13-64. Opportunity score combines multiple metrics (engagement, intensity, momentum, passion, excitement, and impact on sponsors) into one number that represents the sponsorship potential of a property.

Naming Rights Performance

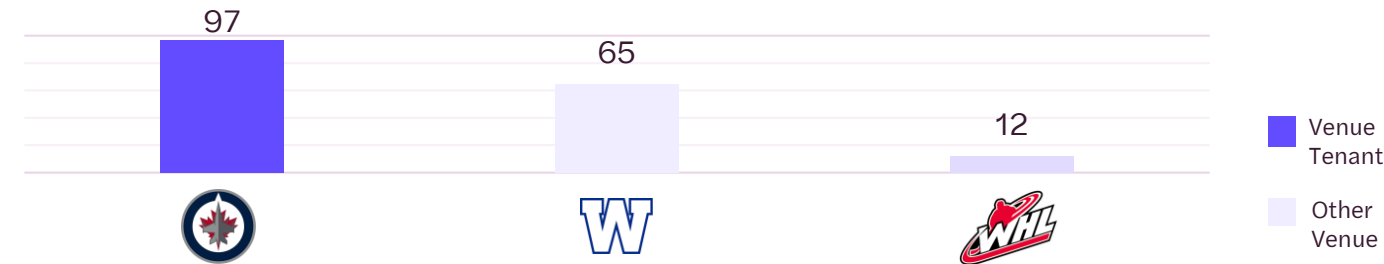


KPI Outcomes

	Name Recognition in Local Market	26% (6th)
	Name Recognition Nationally	5% (7th)
	Name Utilization	15% always use the name Canada Life Centre (7th)
	Noise	Significant Former partner Bell (34%) has stronger equity with the building than current partner Canada Life

Location	Winnipeg, MB		Past Names	MTS Centre, Bell MTS Centre	
Metro Area Population	Capacity	Opened	Named Since	Published Deal Values	
840K	15,000	2004	2021, 10-year deal	None	

Sponsorship Opportunity Score (Key Tenants)



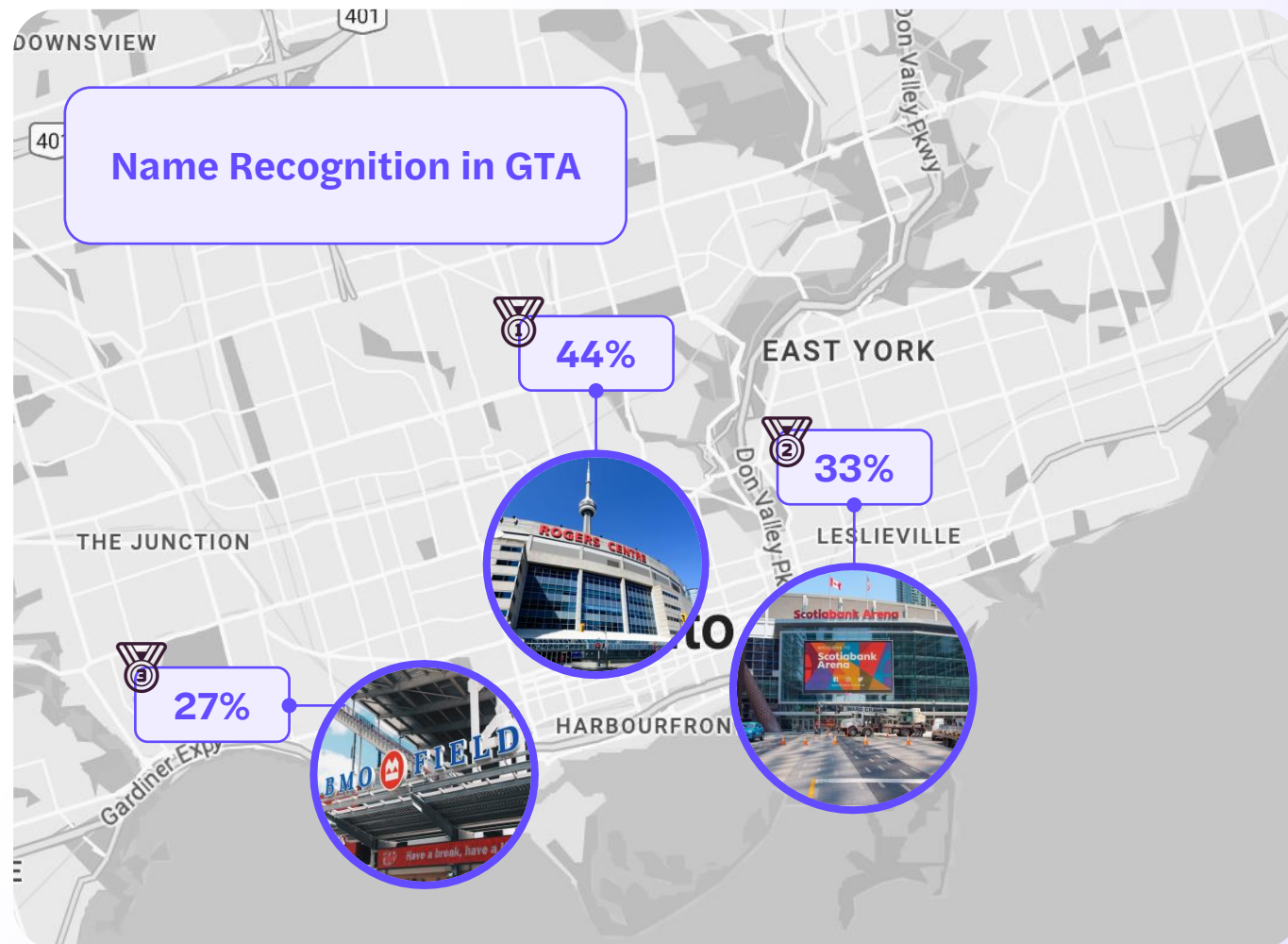
Results among Manitoba general population, 13-64. Opportunity score combines multiple metrics (engagement, intensity, momentum, passion, excitement, and impact on sponsors) into one number that represents the sponsorship potential of a property. Sample too small for CEBL and AHL in Manitoba.

GTA SPOTLIGHT

03.

With three high-profile venues in the GTA that cover NHL, MLB, MLS, and CFL, there's a lot for Torontonians to keep in mind.

All three achieve recognition with nearly 1 in 3 residents – or more.



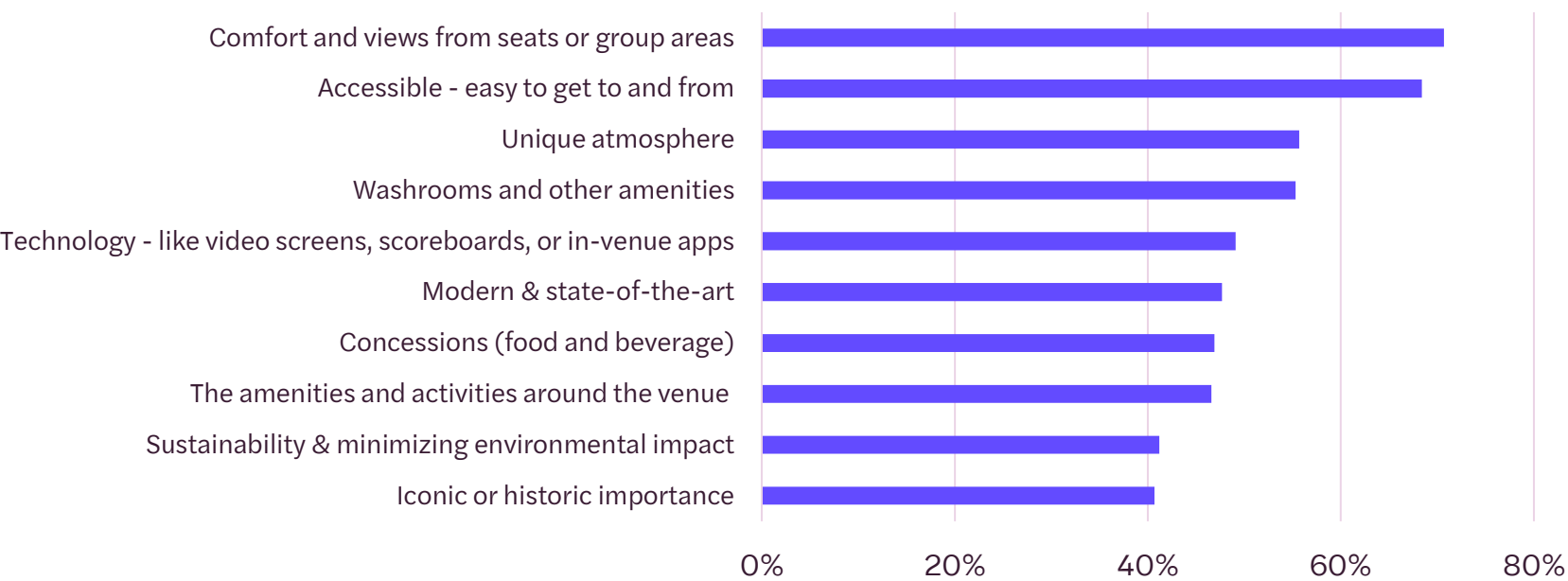
WHAT CANADIANS VALUE IN A VENUE

04.

Canadians value comfort and ease of access above all else – but **atmosphere** and **technology** play a role, too

Drivers of venue visitation beyond the event itself

% ranking 4 or 5 out of 5



Even prior to 2023 renovations, **Rogers Centre** is Canada's favourite venue

Of the stadiums, arenas, or venues you have attended, which is your favorite?

1



Home of the
Toronto Blue Jays,
in Toronto, ON

2

**Scotiabank
Arena**

Home of the Toronto
Maple Leafs and Toronto
Raptors in Toronto, ON

3

Centre
Bell

Home of the
Montreal Canadiens
in Montreal, QC

APPENDIX ABOUT SPONSORPULSE

05.

SponsorPulse helps sponsorship marketers **maximize impact** by enabling data-driven decisions at every stage of the sponsorship journey



Property Selection

We monitor hundreds of potential sponsorship opportunities across sport, entertainment, cause, and music – to assess a new opportunity's fit and benefit.



Valuation

Buy and sell confidently with fact-based guidance on the current & potential value of your sponsorships with our Opportunity Value.



Activation

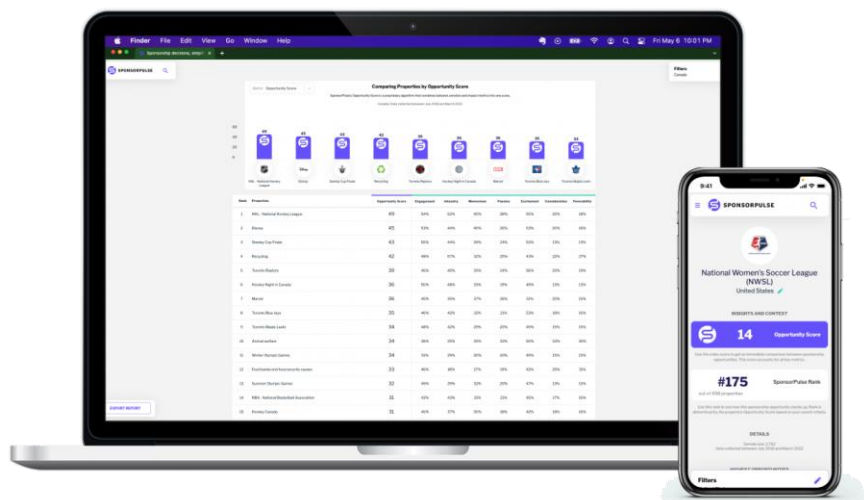
Increase the efficiency of your ad spend through the creation of targeted audience segments using the SponsorPulse Audience Network.



Impact Management

Leverage data to demonstrate outcomes for your brand or your partners with a consumer-first focus.

How we **standout** in an industry in need of evolution



1

Sponsorship-focused

Products and solutions built with intention for sponsorship buyers and sellers, by sponsorship buyers and sellers.

2

Consumer driven, at your fingertips

Our insights are derived from our proprietary global consumer database and Insights Platform, to provide a deep understanding of consumer passions with a few simple clicks.

3

Transparent, actionable, and accessible

The sponsorship industry has needed a credible source of consumer truth for the industry to rely on, and SponsorPulse delivers that.

4

Global industry experience and benchmarks

We offer a complete understanding of the global landscape across thousands of properties, among millions of consumers, and have built ROI benchmarks for continuous optimization.

5

Personal touch

Our team acts as an extension of yours. We have a team dedicated to supporting your success at every stage of the journey.

The company we're proud to keep



"The speed of change today often requires data-informed decisions with near immediacy. SponsorPulse delivers outstandingly on both, bringing confidence in decision making."

Mike Armstrong
Chief Marketing Officer, Juventus FC



"The SponsorPulse team has been a long-standing trusted insights and strategy advisor to TD Bank. Being subscribed to a variety of SponsorPulse's product and service solutions (in particular, the SponsorPulse platform and SponsorPulse Impact Reports) helps us approach our sponsorship decision making with enhanced confidence. We definitely value our partnership!" ."

Kristen Eyre
AVP, Brand Sponsorships & Regional Marketing, TD Bank





Want to see more detailed results?
Other venues?
Get in touch.

Eddy Sidani, Strategic Partnerships Lead



esidani@sponsorpulse.com



[\(905\)-401-9387](tel:(905)-401-9387)



www.sponsorpulse.com