



Canadian Association of Fairs & Exhibition 2022 Annual Landscape Study

Prepared For: CAFE

Date: November, 2022

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01

About SponsorPulse

Our Mission

Bringing Transparency to sponsorship

We're a consumer-data company that helps cut through the noise in sponsorship by **bridging the gap between industry and consumer perspectives.**

Every year, we survey hundreds of thousands of people globally on how they think and feel about sport and entertainment properties, how they react to their sponsors, and what they think about the future of the industry.

We support brands, properties, and agencies **through every stage of the sponsorship journey** with solution that inform decisions, value opportunities, connect you to your target audience and measure your in-market success.



The SponsorPulse difference: how we standout



- **Strictly sponsorship-focused**
Products and solutions built with intention for sponsorship buyers and sellers, by sponsorship buyers and sellers.
- **Strictly consumer driven**
We generate our data and insights through a survey-based methodology, speaking with consumers ages 13+ years and with purchasers/intenders across hundreds of categories, big and small.
- **Extensive global industry experience and benchmarks**
We offer a complete understanding of the global sponsorship landscape with proprietary data across thousands of properties among millions of consumers. Our database for sponsorship performance provides access to success comparatives relative to industry standards across hundreds of sponsorship properties.
- **Roster of leading brands and properties in sponsorship**
We work with brands that span all industries (e.g., Coca-Cola, Pernod Ricard, Nissan, Sony PlayStation, TD Bank) and properties that span all types (e.g., NFL, NHL, NBA, WWE, Live Nation, Cirque du Soleil, WWF)
- **Personal touch**
Our team acts as an extension of yours. We have a team dedicated to supporting you at every stage of the journey: informing → valuing → connecting → measuring.

Our Solutions

How we **deliver on your priorities** and bring transparency to sponsorship



Inform

Our Insights Platform provides instant access to real-time data to answer your most pressing questions in sponsorship.



Value

Spend or sell confidently with fact-based guidance on the current & potential value of your sponsorships with our Opportunity Valuation.



Connect

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



Measure

Leverage data to optimize your sponsorship investments and maximize ROI over time with customized Impact Reports.

02

Strategic Partnership: CAFE & SponsorPulse

Demonstrate how **CAFE stands out...**

Co-lead partnership that will
highlight the **true value and
benefits** of Fairs & Exhibitions
in Canada



Background & Methodology

Objectives

Co-led partnership between CAFE and SponsorPulse™ that will highlight the true value and benefits of Fairs & Exhibitions in Canada through an annual landscape state of the nation consumer-based study. Relevant insights include:

- Reach/engagement
- Property emotional connection
- Property importance
- Property momentum
- Sponsorship benefits & opportunities
- Key brand/category engagement

Screening Criteria

Canadian Residents aged 13 to 64

- representative to the Canadian general population

Timeline

- September 19th to September 29th, 2022

Sample

- Total Sample (N=2,000):
- NET CAFE Engaged N=1,060

Agricultural Fairs	Agricultural Exhibitions
Community Fairs	National Exhibitions
Winter/Christmas/Lights Celebrations and Fairs	Regional Exhibitions

Canadian Association of Fairs & Exhibition 2022 Annual Landscape Study

03

Executive Overview

Summary of Key Insights

- 1. CAFE properties experience a truly national and diverse following, providing prospective partners access to numerous target consumers**
- 2. CAFE properties promote a passionate connection with growing interest in relevant exhibitions**
- 3. CAFE fairs and exhibitions were portrayed as eliciting very positive emotions to those engaged, and providing important outcomes**
- 4. Beyond exceptional engagement, CAFE engagers also demonstrate strong sponsorship impact results**
- 5. Key brand user segments and category purchasers represent excellent fits for CAFE**

With approximately **13.5 million Canadian residents** (between the ages of 13-64) **engaged** in the past year, CAFE's portfolio of exhibitions and fairs attract consumers from nearly all demographics..

With such a broad offering of important exhibitions to local communities, **nearly 1-in-3 of CAFE engagers are passionate** about these exhibitions, and even better, almost 50% expressed a growing interest.

In terms of the importance of fairs and exhibitions, four critical themes emerged: **community engagement, economic benefits, family time, and celebrating or showcasing what local communities have to offer.**

Over **1-in-4 Canadian residents engaged** with CAFE properties expressed a **NET increase in their likelihood** of either 1) **purchasing from a partner brand (25%)** or 2) **experiencing elevated feelings towards that brand (28%).**

All **brand user-segments and key purchase categories** showed **exceptional engagement** with CAFE, most notable being these key category purchasers: **equipment/machinery for construction/agricultural/residential purposes**

04

Reach & Engagement

13.5MM

53% of Canadians aged 13 to 64 have **engaged** with CAFE portfolio exhibitions and fairs in the past year



Profile of those Engaged: Though overall, CAFE engagement is consistent with the general population, it does over-index with younger individuals (13-34 y/o), families (kids <18 in HH), non-Canadian-born, and key category purchasers

% Total CAFE Member Portfolio Engaged



Highlight Indicates over index vs. Gen Pop

Base: Total CAFE Engaged/ Total Canada Gen Pop



49%
Male
50% Gen Pop

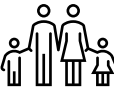
51%
Female
50% Gen Pop



50%
13-34
40% Gen Pop

35%
35-54
40% Gen Pop

15%
55-64
20% Gen Pop



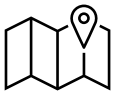
40%
Kids in HHLD <18
33% Gen Pop

60%
No Kids in HHLD
67% Gen Pop



74%
Born in Canada
78% Gen Pop

26%
Foreign Born
22% Gen Pop



35%
West
32% Gen Pop

13%
BC
12% Gen Pop

22%
Prairies
20% Gen Pop

41%
Ontario**
38% Gen Pop

24%
QC + ATL
30% Gen Pop

17%
Quebec
23% Gen Pop

8%
Atlantic Can.
7% Gen Pop



19%
*Key Long-term Category
13% Gen Pop

81%
*Non-Key Long-term Category
87% Gen Pop



31%
Under \$50K
34% Gen Pop

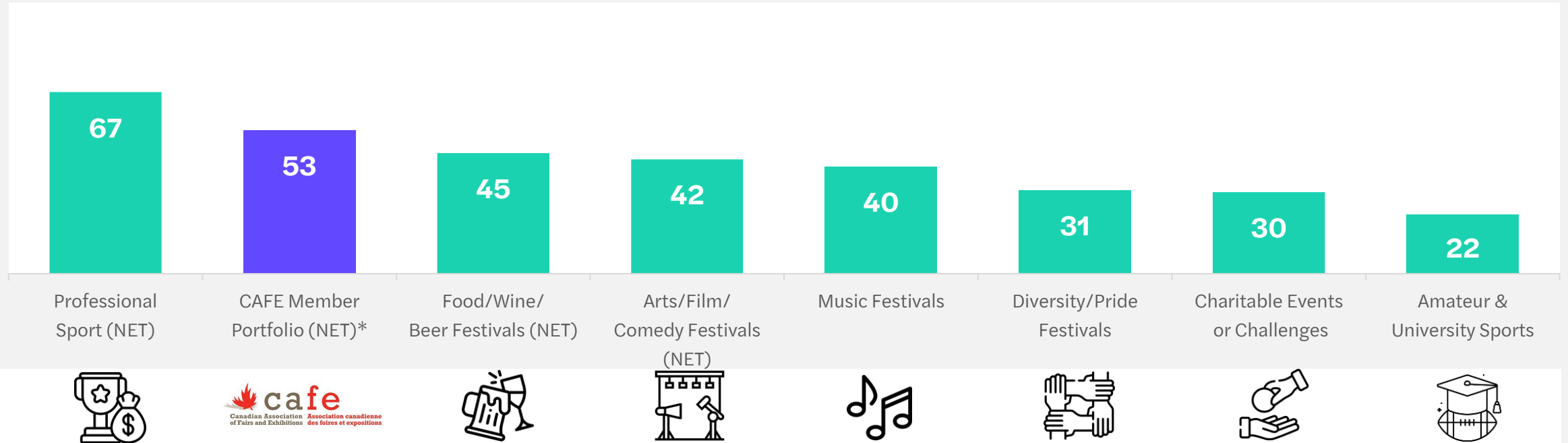
40%
\$50-\$100K
39% Gen Pop

29%
Over \$100K
27% Gen Pop

Against comparable lifestyle and sport properties, the CAFE portfolio sees exceptional engagement, only falling behind pro sport among the Canadian general population

Engagement – Lifestyle & Sport Properties

% Engaged 1+ in P12M, Total Canada

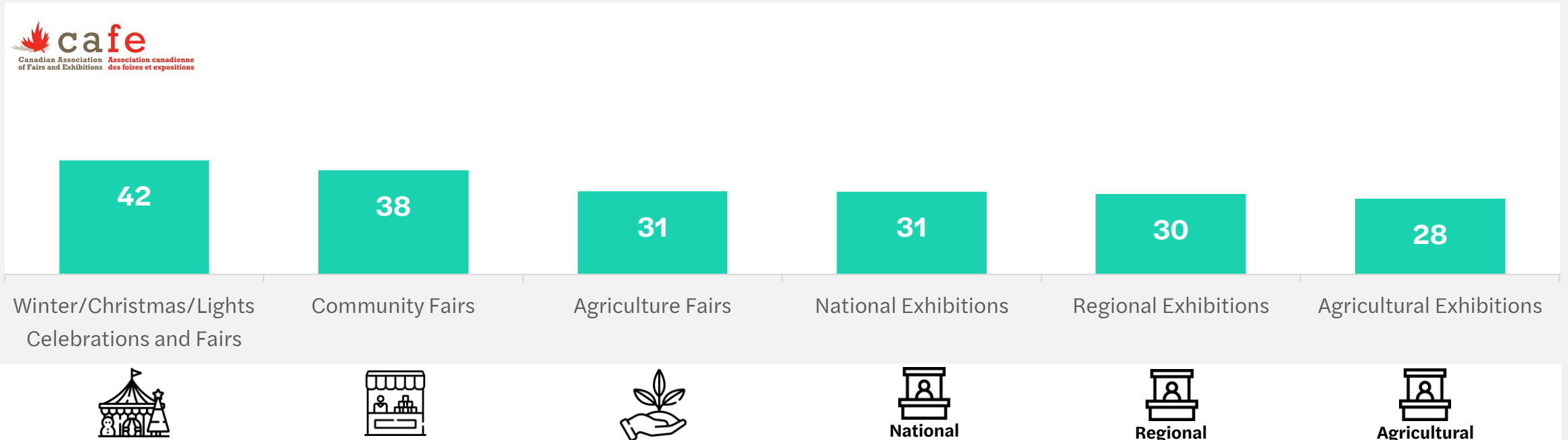


Q. For the following property, have you done the following in the past year?
Base: Canadians 13-64

Within CAFE portfolio properties, Winter/Christmas celebrations and Community Fairs see the highest engagement, while the various Exhibitions show similar levels

Engagement – CAFE Portfolio

% Engaged 1+ in P12M, Total Canada



Q. For the following property, have you done the following in the past year?
Base: Canadians 13-64

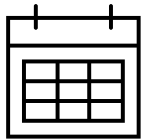
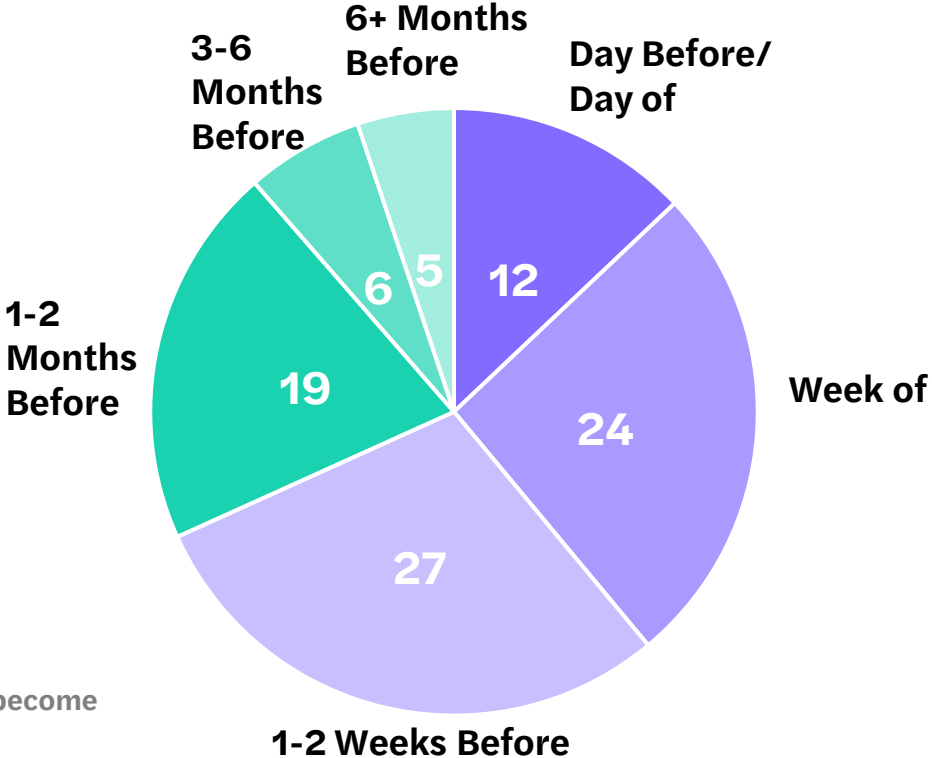
2 IN 3

66% of Canadians engaged with CAFE portfolio exhibitions and fairs have also [attended in person](#).



Attendance Commitment: As outlined below, the majority (63%) of CAFE attendance is driven within 2 weeks of the exhibition or fair itself

Engagement Commitment % Selected, among Canada CAFE Engaged



NET CAFE Attendance Driven:

- Within 1 Week of exhibition/fair: 36%
- Within 2 Weeks of exhibition/fair: 63%
- Within 2 Months of exhibition/fair: 81%

Whenever Tickets become Available: 8%

Q.25 When you attend each of the following, how long before do you typically decide if you're going to attend?
Base: CAFE Engaged in Canada (n=1060)

Attendance naturally drives engagement, but is also notably higher for Winter-based Celebrations and Fairs as well as Community Fairs with less media presence










Engagement – Attend

% Selected, among Canada CAFE Engaged




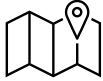

Q.6 For the following entertainment & lifestyle events or programs, have you done the following in the past year? – NET CAFE
 Base: CAFE Engaged in Canada (n=1060)

CAFE Attend Profiles: Demographic profiles of those who attend the various CAFE portfolio fairs or exhibitions are below – females and younger individuals over-index...

CAFE Attend Profiles	NET CAFE	Agriculture Fairs	Community Fairs	Winter/Christmas/Lights Celebrations and Fairs	Agricultural Exhibitions	National Exhibitions	Regional Exhibitions
 Male	49%	41%	42%	37%	40%	47%	48%
 Female	51%	59%	58%	63%	60%	53%	52%
 13 to 34	48%	50%	44%	46%	48%	52%	48%
 35 to 54	36%	31%	40%	36%	31%	34%	32%
 55 to 64	16%	19%	16%	18%	21%	15%	20%
 Canadian-Born	76%	83%	78%	76%	84%	71%	75%
 Foreign-Born	24%	17%	22%	24%	16%	29%	25%
 Kids <18 in HH	39%	40%	38%	39%	40%	35%	33%
 No Kids <18 in HH	61%	60%	62%	61%	60%	65%	67%

Highlight Indicates over index vs. Gen Pop

... along with those who live in the West (BC/Prairies), along with the key category segments

	CAFE Attend Profiles	NET CAFE	Agriculture Fairs	Community Fairs	Winter/Christmas/Lights Celebrations and Fairs	Agricultural Exhibitions	National Exhibitions	Regional Exhibitions
	HHI: <\$50K	27%	29%	25%	27%	28%	27%	27%
	HHI: \$50 - \$100K	40%	36%	41%	38%	40%	39%	38%
	HHI: \$100K+	33%	35%	34%	34%	33%	34%	35%
	BC	14%	13%	16%	16%	15%	16%	14%
	Prairies	23%	23%	24%	25%	21%	16%	21%
	Ontario	42%	41%	43%	43%	34%	52%	38%
	Quebec	14%	12%	9%	10%	20%	10%	17%
	Atlantic Canada	7%	11%	8%	7%	10%	7%	10%
	*Key Category NET	17%	20%	13%	15%	21%	19%	19%
	Key Category – Agricultural	4%	6%	4%	4%	5%	6%	6%
	Key Category – Construction	7%	8%	6%	6%	9%	7%	10%
	Key Category - Residential	11%	12%	10%	11%	14%	14%	12%

05

Passion & Emotional Connection

4.3MM

32% of Canadian Residents that engage with CAFE's portfolio have a strong **emotional connection** to the property



Profile of those **Passionate**: Canadians that report having an emotional connection to CAFE exhibitions and fairs over-index as younger individuals (13-34 y/o), females, families (kids <18 in HH), and key category purchasers

% CAFE Member Portfolio Passionate



Highlight Indicates over index vs. Gen Pop



34%
Male
50% Gen Pop

66%
Female
50% Gen Pop



50%
13-34
41% Gen Pop

32%
35-54
39% Gen Pop

18%
55-64
20% Gen Pop



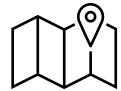
38%
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Ontario**
38% Gen Pop

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35%
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Base: Total CAFE Engaged/ Total Canada Gen Pop

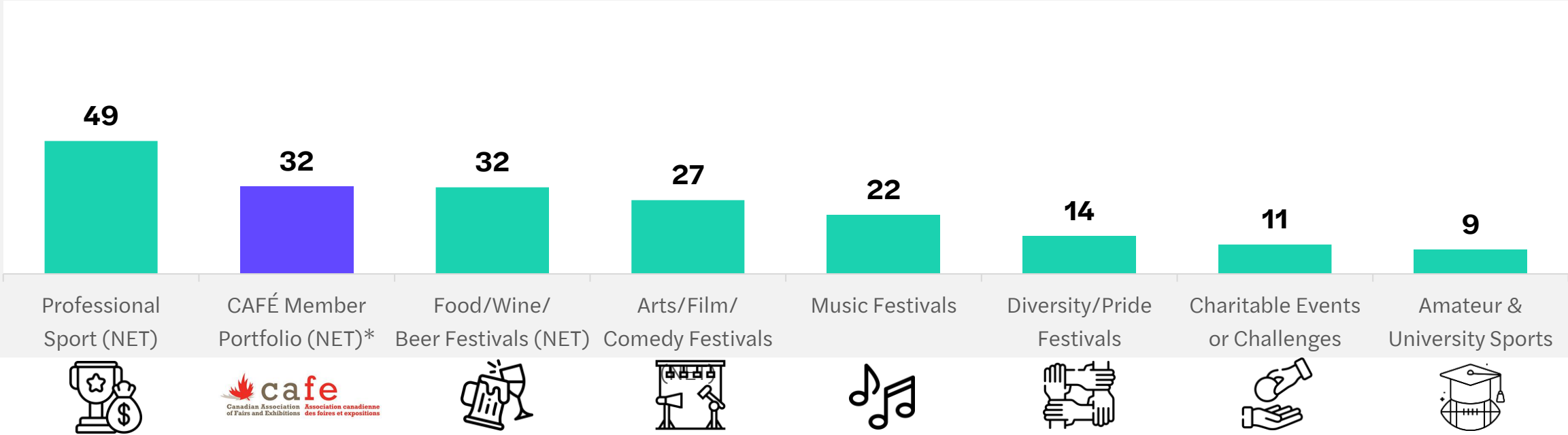
*Key Category NET – Purchase Equipment/Machinery Products (Agricultural, Construction, or Residential Purposes) – N18M

**Southern Ontario: Gen Pop = 22% & CAFE Passionate = 23%

Versus comparable properties, CAFE sees strong passion among Canadians engaged, only falling behind pro sport, and exceeding major properties such as music festivals

Passion – Lifestyle & Sport Properties

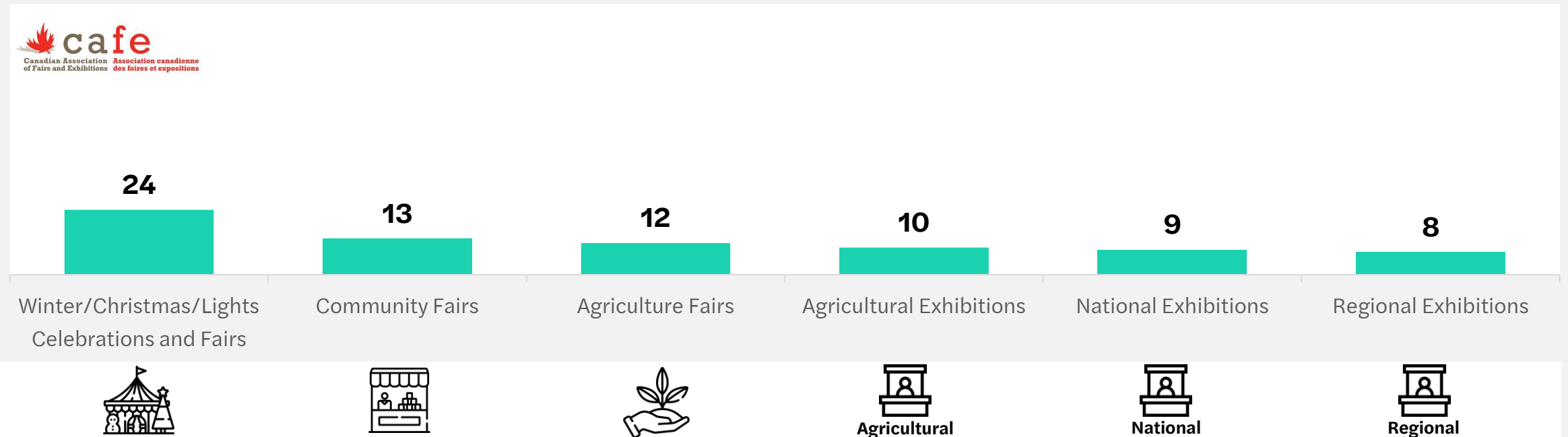
% Engaged 1+ in P12M, Total Canada Engaged with Property



Q.27 Which of the following are you passionate about?
 Base: Canadians 13-64 Engaged with each property

Relatively consistent passion levels are seen across the CAFE portfolio, aside from Winter/Christmas/Lights Celebrations and Fairs

Passion – CAFE Portfolio
% Selected, Total Canada CAFE Engaged



Q. For the following property, have you done the following in the past year?
Base: Total CAFE Engaged Canada (1060)

For fair and exhibition attendees, these experiences generate positive emotions: Happiness, Excitement, and the feeling of having Fun were the top-3 expressed

How Attendees Feel at Fairs & Exhibitions

Among Canada General Population



Q. What are the Top 3 words you would use to describe how you feel while at Fairs & Exhibitions?
Base: Canada General Population

To Canadians, fairs & exhibitions provide value in various ways, including driving activity for local businesses, celebrating the community itself, and bringing families together

Community Engagement



“Helps maintain a sense of community”

“Brings communities together”

Family



“Chance to spend time with friends and family”

“Fun for the whole family”

Importance of Fairs & Exhibitions

Among Canada General Population



Economy/Tourism



“It's good for local business as it brings people to the community.”

“They give the community economy a boost”

Celebrate/Showcase



“An opportunity to showcase art and entertainment”

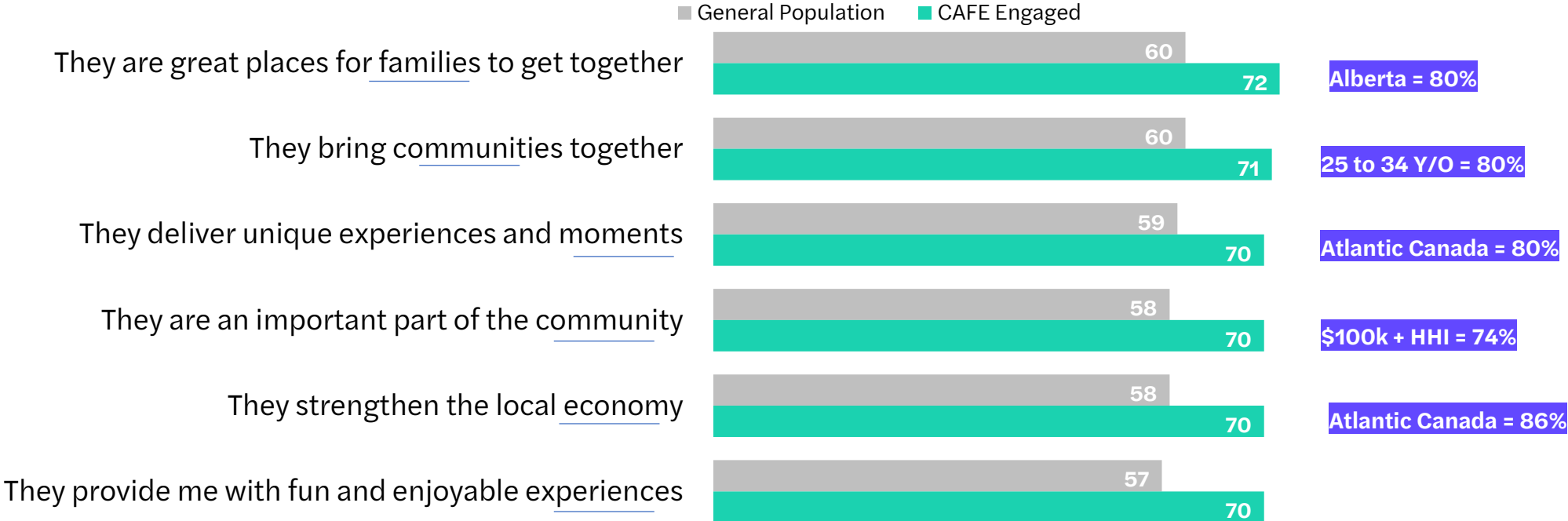
“Part of our culture and heritage”

Q. Why do you believe Fairs & Exhibitions are important to the community?
Base: Canada General Population

Top 6 statements (in terms of agreement) that demonstrate the perceived value: providing experiences, bringing people together, and facilitating economic benefits

Fair & Exhibition Statements – Total Agree (Top 6)

% Agree



Q.21 Please rate how much you agree with the following statements about Fairs and Exhibitions - Summary - Total Agree
 Base: Total Canada (n=2000); Total CAFE Engaged Canada (1060)

Within the CAFE portfolio, engagers with community and seasonal (Winter/Christmas) exhibitions & fairs show some elevated agreement

Fair & Exhibition Statements – Top 2 & Average (All Statements)

% Total Agree, among [Canada Engaged CAFE](#)

CAFE Portfolio	Statement	%	Avg (%)
Agriculture Fairs	They deliver unique experiences and moments	69	63
	They strengthen the local economy	69	
Community Fairs	They are an important part of the community	71	64
	They deliver unique experiences and moments	71	
Winter/Christmas/Lights Celebrations and Fairs	They are great places for families to get together	72	64
	They bring communities together	71	

CAFE Portfolio	Statement	%	Avg (%)
Agricultural Exhibitions	They strengthen the local economy	67	61
	They are an important part of the community	66	
National Exhibitions	They deliver unique experiences and moments	70	63
	They are great places for families to get together	70	
Regional Exhibitions	They deliver unique experiences and moments	69	63
	They are an important part of the community	69	

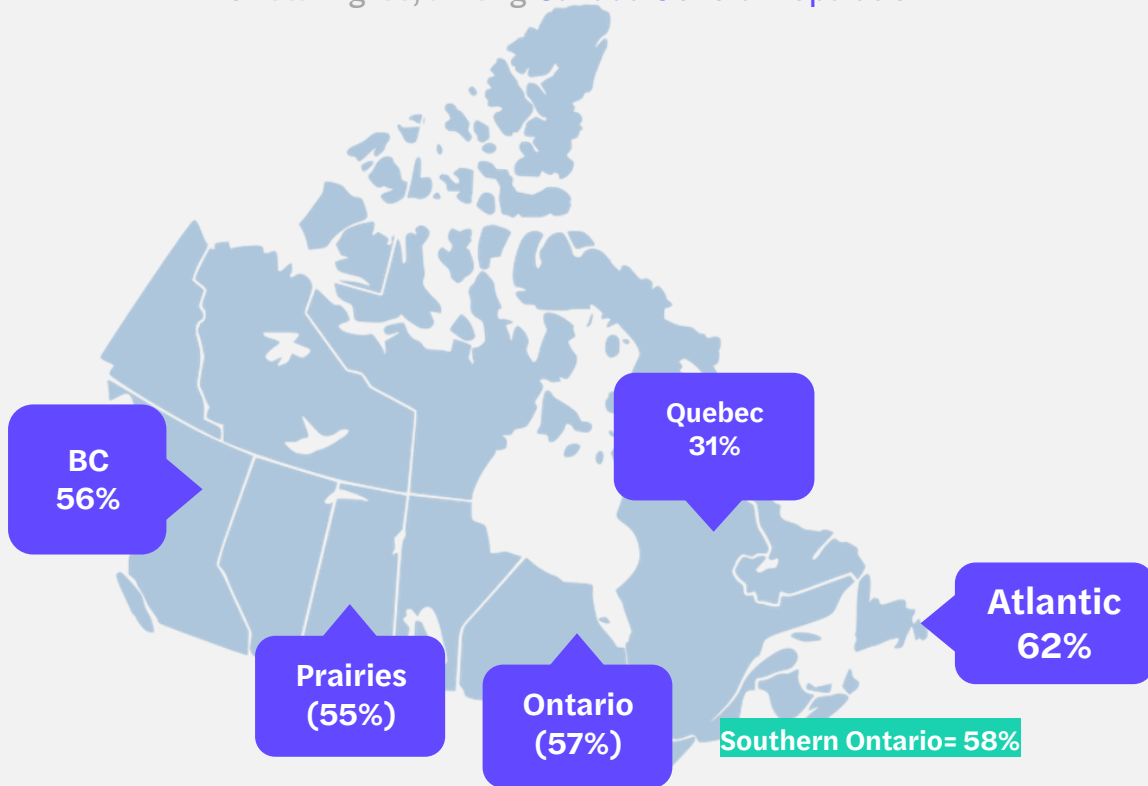
Highlight Indicates over index within CAFE groups

Q.21 Please rate how much you agree with the following statements about Fairs and Exhibitions - Summary - Total Agree
Base: CAFE Engaged (n=1060)

Across all fair/exhibition statements, both with general population and CAFE Engaged, Atlantic Canada residents exhibited strong agreeance on average...

Fair & Exhibition Statements – Average (All Statements)

% Total Agree, among [Canada General Population](#)




Statement Agreement (Top 2) - by Region		
Region	Statement	%
Atlantic Canada	They strengthen the local economy	74
	They deliver unique experiences and moments	72
BC	They are great places for families to get together	69
	They are an important part of the community	67
Prairies	They strengthen the local economy	67
	They bring communities together	66
Ontario	They bring communities together	68
	They are great places for families to get together	68
Quebec	They are great places for families to get together	35
	They deliver unique experiences and moments	34

Q.21 Please rate how much you agree with the following statements about Fairs and Exhibitions - Summary - Total Agree
 Base: Total Canada (n=2000)



When comparing within key demographics, heightened agreeance is seen with females, younger (13-34 y/o), along with families and non-Canadian-born...

Fair & Exhibition Statements – Top 2 & Average (All Statements)


% Total Agree, among **Canada General Population**



Demographic	Statement	%	Avg (%)
Males	They are great places for families to get together	57	49
	They bring communities together	57	
Females	They are great places for families to get together	63	53
	They deliver unique experiences and moments	63	
13-34	They are great places for families to get together	66	56
	They deliver unique experiences and moments	65	
35-54	They are great places for families to get together	59	49
	They bring communities together	59	
55-64	They strengthen the local economy	55	45
	They bring communities together	53	

Demographic	Statement	%	Avg (%)
Canadian-Born	They are great places for families to get together	59	49
	They bring communities together	59	
Foreign-Born	They are great places for families to get together	65	57
	They are an important part of the community	65	
Kids <18 in HH	They are great places for families to get together	66	56
	They bring communities together	64	
No Kids <18 in HH	They bring communities together	58	49
	They are great places for families to get together	58	




Highlight Indicates over index within demographic group

Q.21 Please rate how much you agree with the following statements about Fairs and Exhibitions - Summary - Total Agree
Base: Total Canada (n=2000)


...as well as being slightly higher for high-income earning HHs (\$100k+), with some variation across key category purchasers...

Fair & Exhibition Statements – Top 2 & Average (All Statements)

% Total Agree, among [Canada General Population](#)



Demographic	Statement	%	Avg (%)
HHI: <\$50K	They are great places for families to get together	59	50
	They bring communities together	58	
HHI: \$50 - \$100K	They are great places for families to get together	59	50
	They bring communities together	59	
HHI: \$100K+	They bring communities together	64	53
	They are great places for families to get together	63	



Key Purchase Category	Statement	%	Avg (%)
Agricultural	I like to invite my friends and family to Fairs & Exhibitions	65	57
	They strengthen community connectedness	63	
Construction	They are an important part of the community	67	58
	They are great places for families to get together	66	
Residential	They bring communities together	64	55
	They are an important part of the community	63	

Highlight Indicates over index within demographic/category group

Q.21 Please rate how much you agree with the following statements about Fairs and Exhibitions - Summary - Total Agree
Base: Total Canada (n=2000)

06

Momentum

6MM

45% of Canadian Residents that engage with CAFE's portfolio expect to be **more interested** in CAFE exhibitions & fairs over the next 12 months



Momentum Profile: Engaged Canadians that report increasing interest in CAFE fairs and exhibitions over-index again as younger individuals (13-34 y/o), females, and key category purchasers

% CAFE Member Portfolio Momentum



Highlight Indicates over index vs. Gen Pop



36%
Male
50% Gen Pop

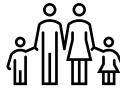
64%
Female
50% Gen Pop



51%
13-34
41% Gen Pop

31%
35-54
39% Gen Pop

18%
55-64
20% Gen Pop



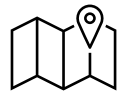
33%
Kids in HHLD <18
33% Gen Pop

67%
No Kids in HHLD
67% Gen Pop



78%
Born in Canada
78% Gen Pop

22%
Foreign Born
22% Gen Pop



37%
West
32% Gen Pop

15%
BC
12% Gen Pop

23%
Prairies
20% Gen Pop

39%
Ontario**
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Quebec
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21%
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30%
Under \$50K
34% Gen Pop

42%
\$50-\$100K
39% Gen Pop

28%
Over \$100K
27% Gen Pop

Base: Total CAFE Engaged/ Total Canada Gen Pop

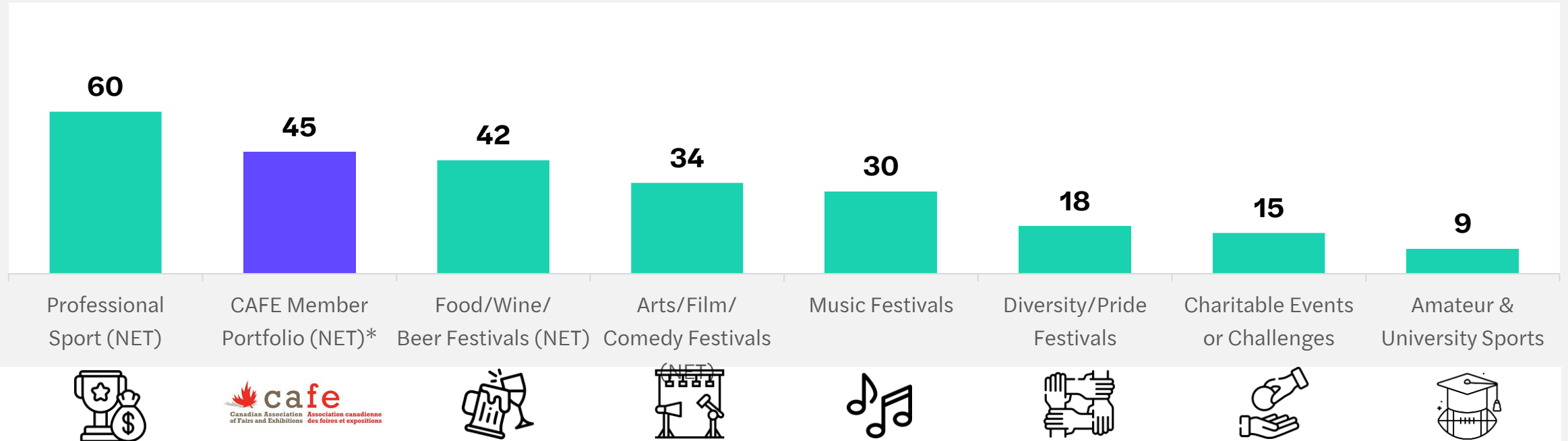
*Key Category NET – Purchase Equipment/Machinery Products (Agricultural, Construction, or Residential Purposes) – N18M

**Southern Ontario: Gen Pop = 22% & CAFE Momentum = 23%

Similar to engagement and passion, CAFE sees impressive momentum results among Canadians engaged, especially compared to other relevant properties

Momentum – Lifestyle & Sport Properties

% Engaged 1+ in P12M, Total Canada Engaged with Property

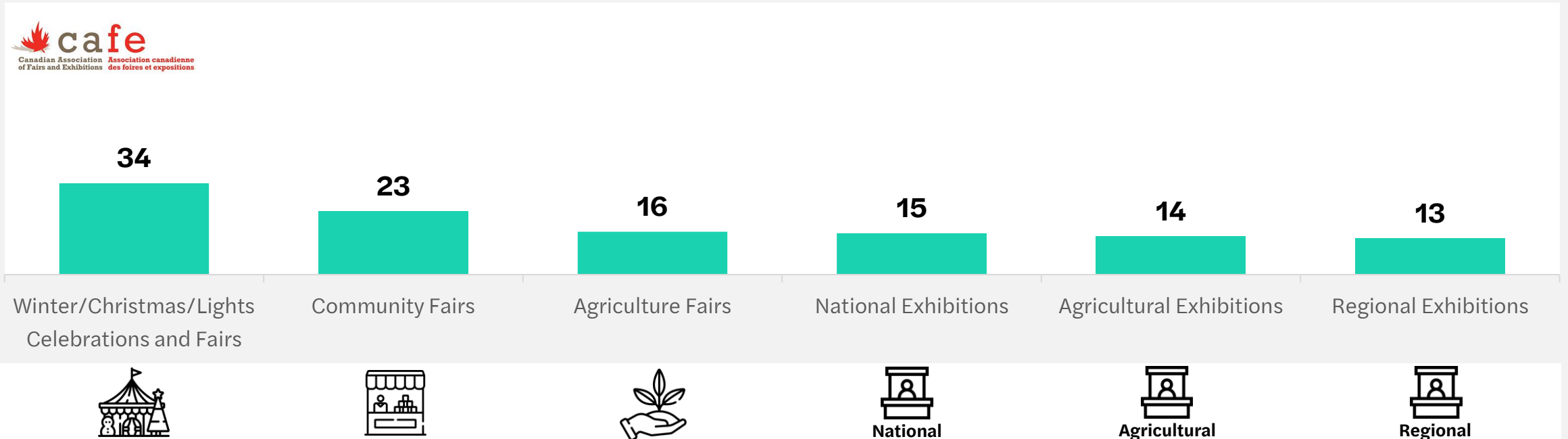


Q.26 In the next 12 months, which of the following will you be more interested in?
Base: Canadians 13-64 Engaged with each property

The Winter-based Celebrations and Fairs continue to stand out among CAFE engagers, with Community Fairs also pulling ahead in terms of growing interest

Momentum – CAFE Portfolio

% Selected, Total Canada CAFE Engaged



Q.26 In the next 12 months, which of the following will you be more interested in?
Base: Total CAFE Engaged Canada (1060)

07

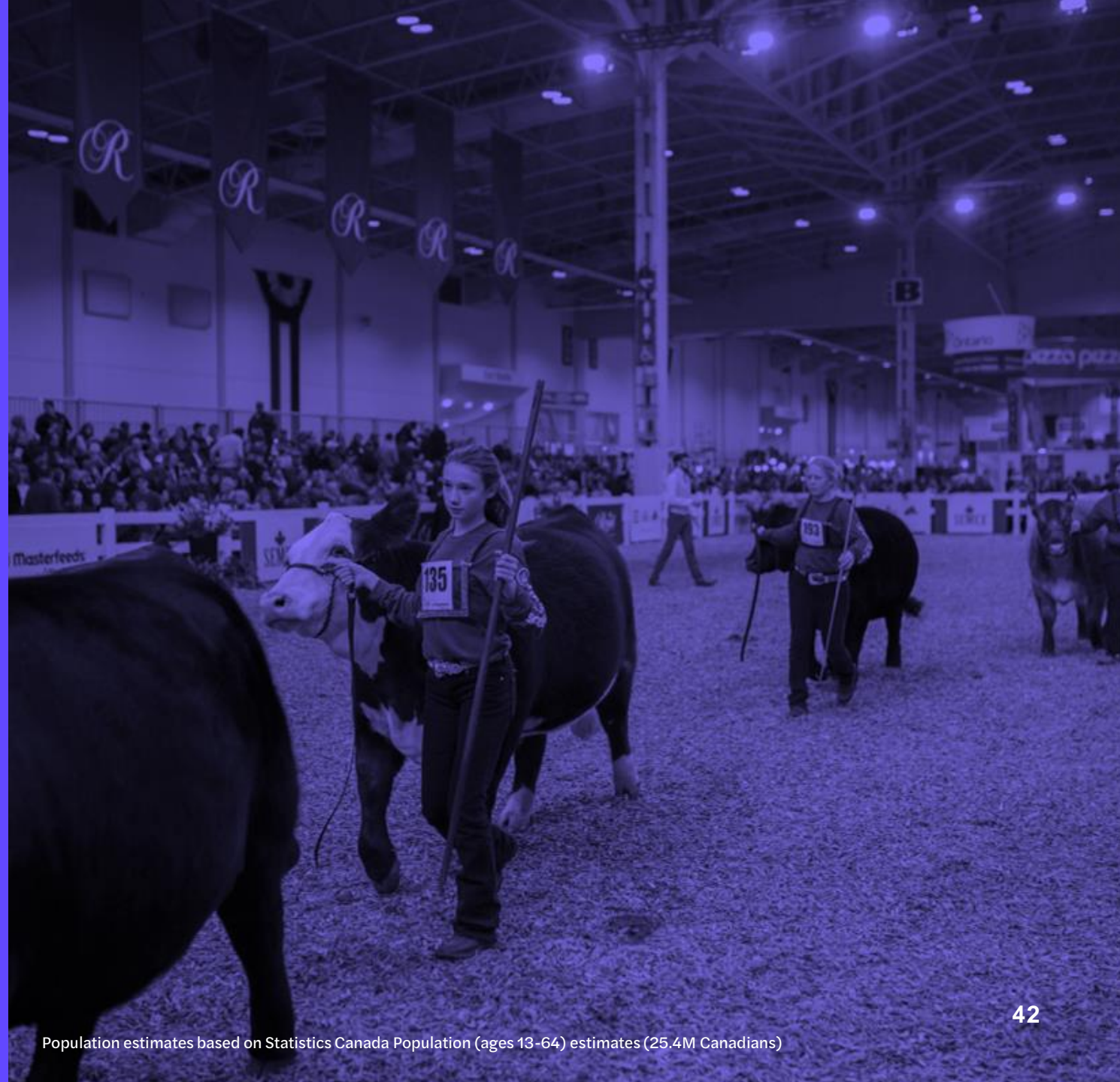
Sponsorship Benefits & Opportunities

7 A

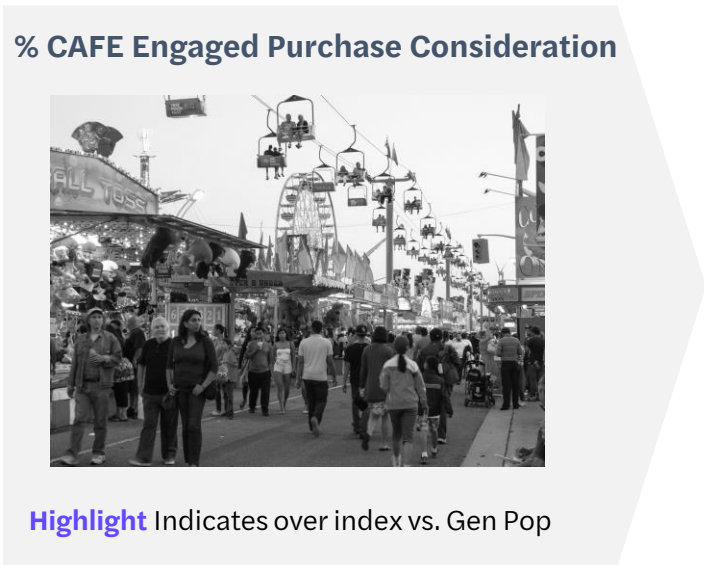
Association Impact Potential

4.7MM

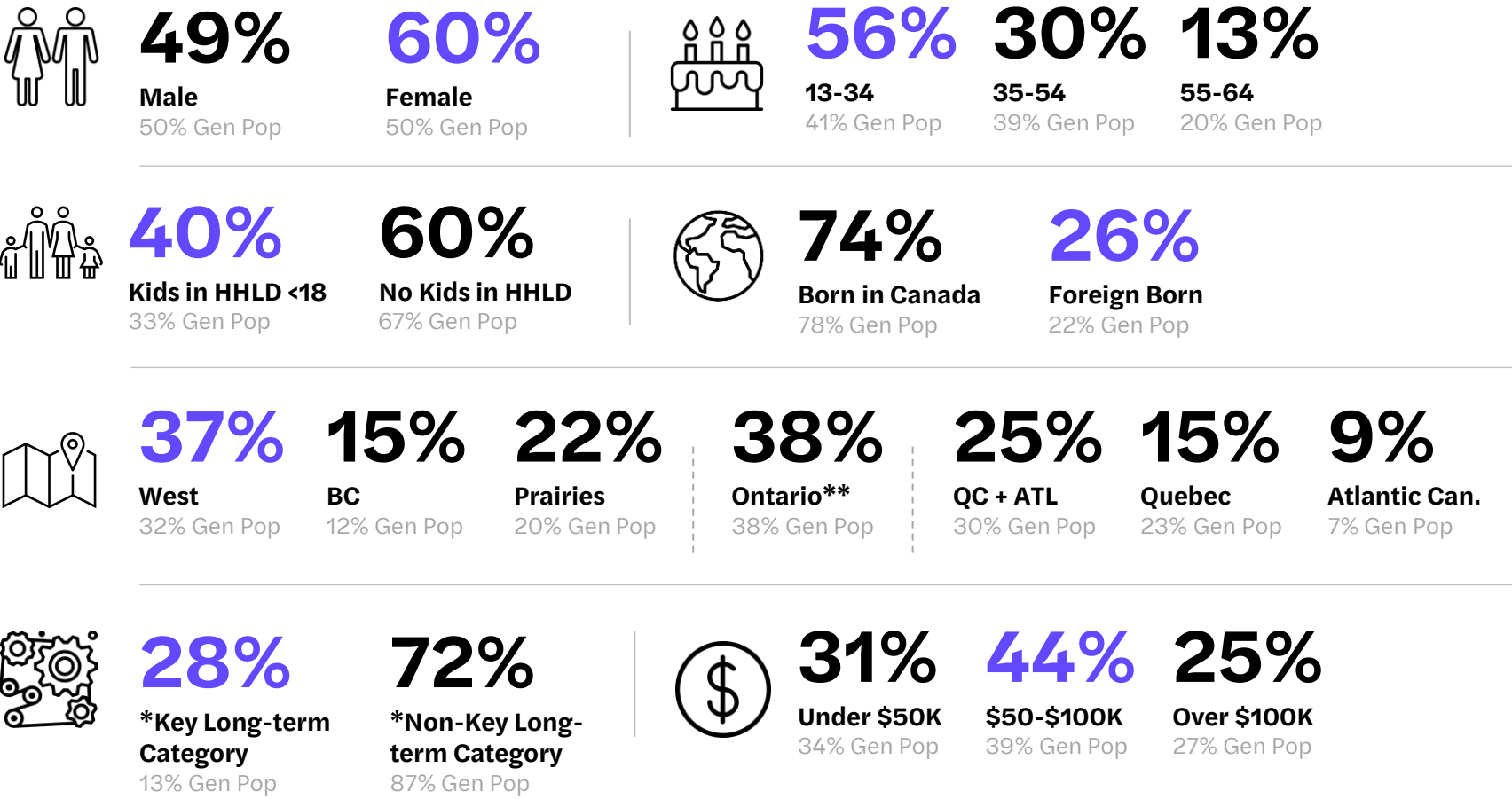
35% of Canadian Residents that engage with CAFE's portfolio expressed enhanced purchase consideration or brand favourability towards CAFE exhibitions and fairs



Purchase Consideration Profile: CAFE engagers that report elevated purchase consideration towards partners of CAFE fairs and exhibitions over-index with similar demographics (female, younger, families, and Western Canada)



Highlight Indicates over index vs. Gen Pop



Base: Total CAFE Engaged/ Total Canada Gen Pop

*Key Category NET – Purchase Equipment/Machinery Products (Agricultural, Construction, or Residential Purposes) – N18M
 **Southern Ontario: Gen Pop = 22% & CAFE Purchase Consideration = 22%

With purchase consideration, CAFE performs well, closer to Pro Sport's level; similar rankings are seen overall, with Arts/Film/Comedy surpassing Food/Wine/Beer fests

Purchase Consideration – Lifestyle & Sport Properties

% NET Increase in Consideration, Total Canada Engaged with Property



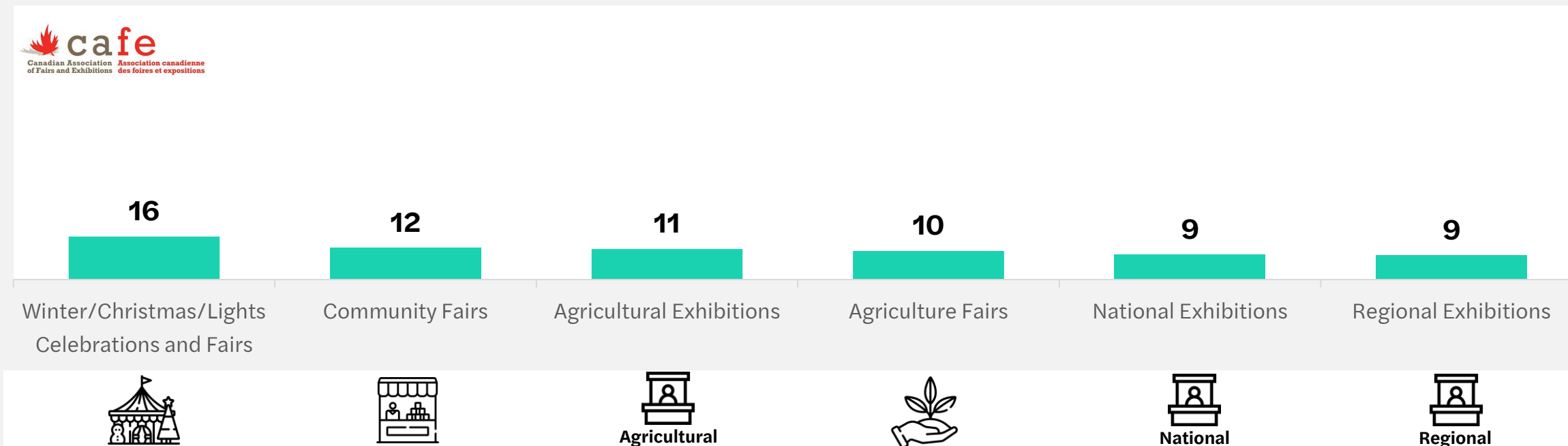
Q.28 Please select the list of properties that apply to the statement below I am more likely to consider purchasing a brand that sponsors this property.

Base: Canadians 13-64 Engaged with Property

Though a similar order of CAFE fairs and exhibitions is seen, aside from Agricultural Exhibitions surpassing Agricultural Fairs, impact levels are close across the portfolio

Purchase Consideration – CAFE Portfolio

% NET Increase in Consideration, Total Canada CAFE Engaged



Q.28 Please select the list of properties that apply to the statement below I am more likely to consider purchasing a brand that sponsors this property.

Base: Total CAFE Engaged Canada (1060)

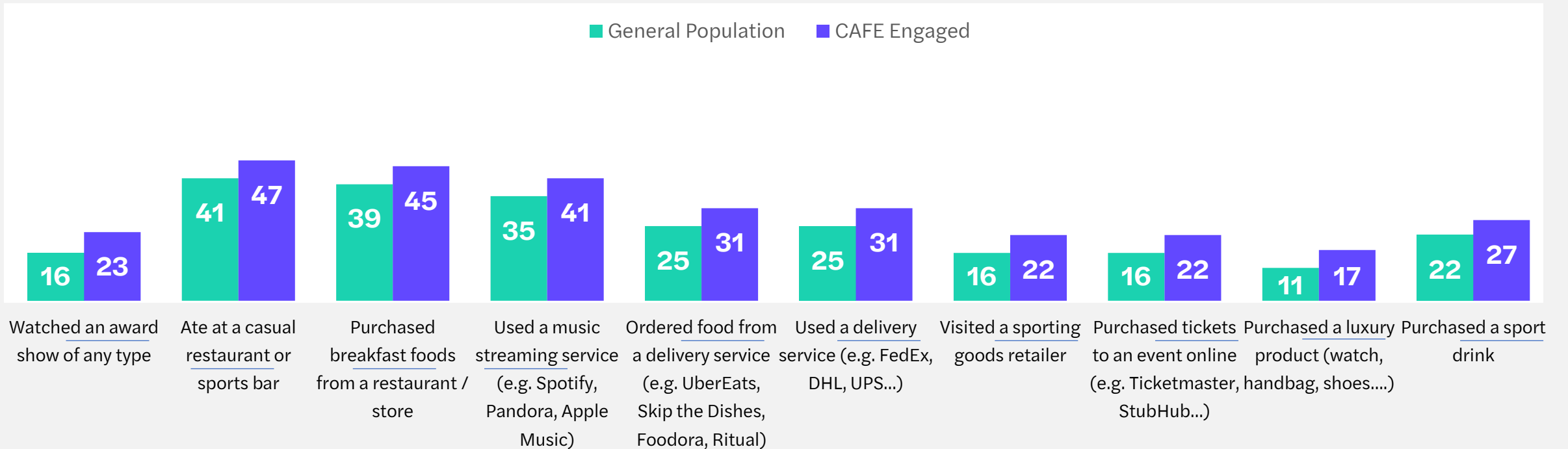
7 B

Category & Brand Targeting

Compared to the general population, CAFE portfolio engagers over-index most with various food and entertainment-based categories...

Top Category Engagement – Top 10 (out of 81 categories)

% Engaged in the P12M



Q.47 Which of the following have you done in the past three months?

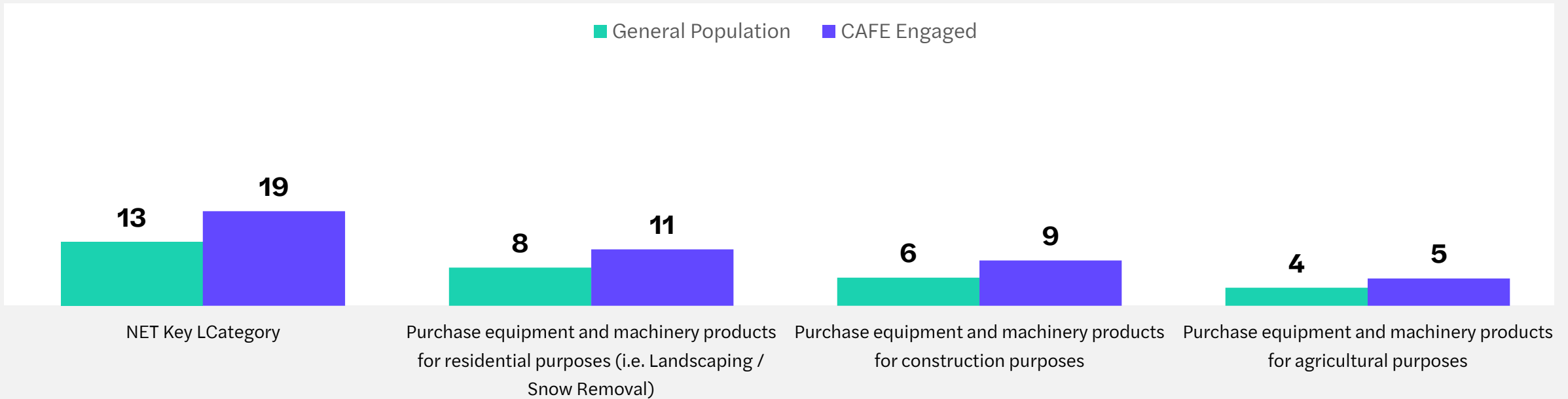
Q.48 Which of the following are you likely to do in the next 18 months?

Base: Total Canada Gen Pop (n=2000); Total Total CAFE Engaged Canada (1060)

...and also over-index with key long-term purchase categories, especially residential and construction-purposed equipment and machinery

Category Engagement – Key Categories

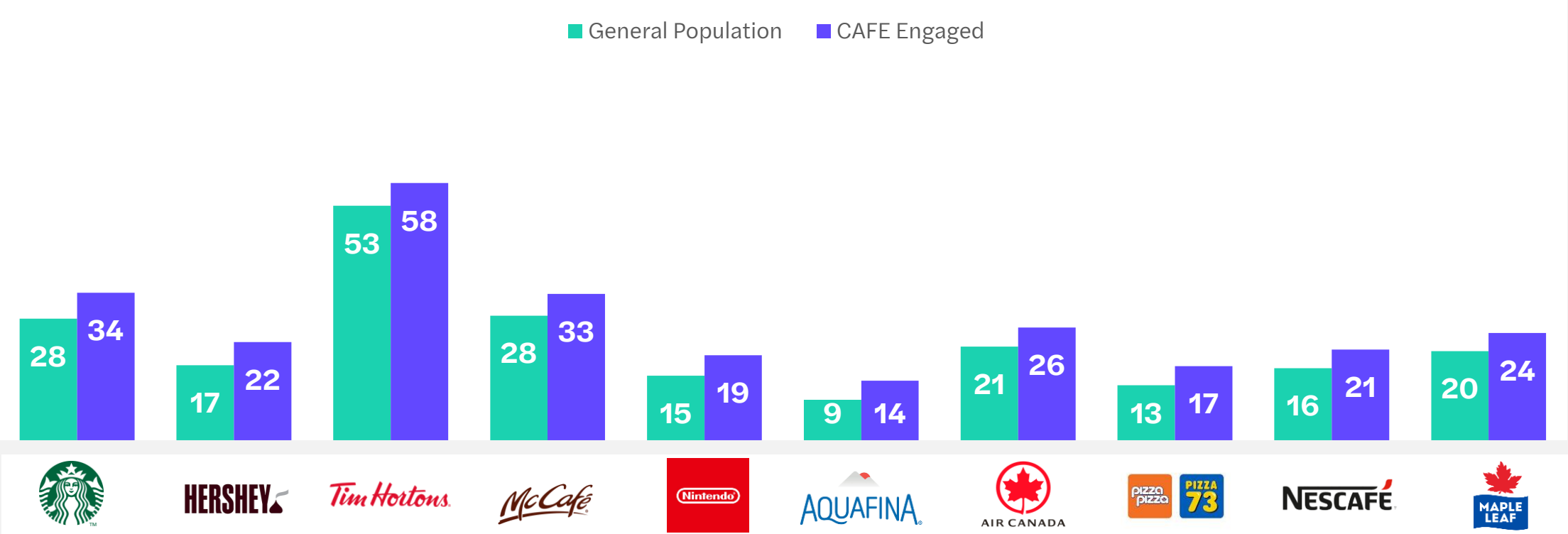
% Engaged in the P12M



The top brands that CAFE engagers over index vs. the general population are shown below, with everyday coffee brands standing out in particular

Top Brand User Engagement – Top 10 (of 125)

% Engaged in the P3M



08

Telling Your Story...

CAFE Overview: By the Numbers

CAFE Engagement & Excitement

13.5MM Total Engaged in Canada
(53% Engaged with CAFE)

8.9MM Excited Engagers
(66% Excited among engaged)

6MM Engagers with Increased Interest
(45% Momentum among Engaged)

CAFE Prospective Partner Incentives

4.7MM NET Sponsorship Impact - Purchase
Intent or Brand Favourability
(35% among Total Engaged in Canada)

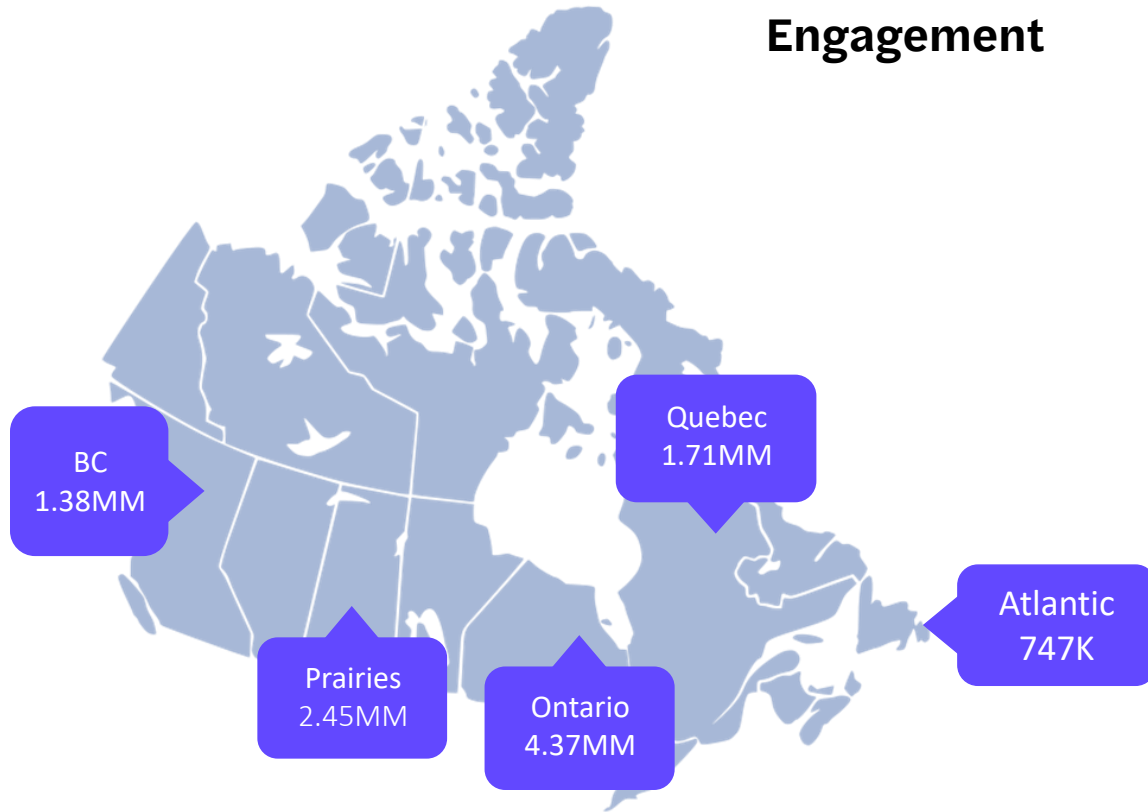
3.4MM Elevated Partner Consideration
(+25% among Engaged)

3.8MM Enhanced Partner Favourability
(+28% among Engaged + Aware)

**All numbers are among ages 13 – 64 years. CAFE engagement among 13 – 64 years (Canada)=13.5MM.

By the Numbers: Winter/Christmas/Light Celebrations & Fairs

Engagement



National

10.7MM

Total Engaged in Canada
(42% Engaged with Agriculture Fairs)

3.6MM

Engagers with Increased Interest
(34% Momentum among Engaged)

2.6MM

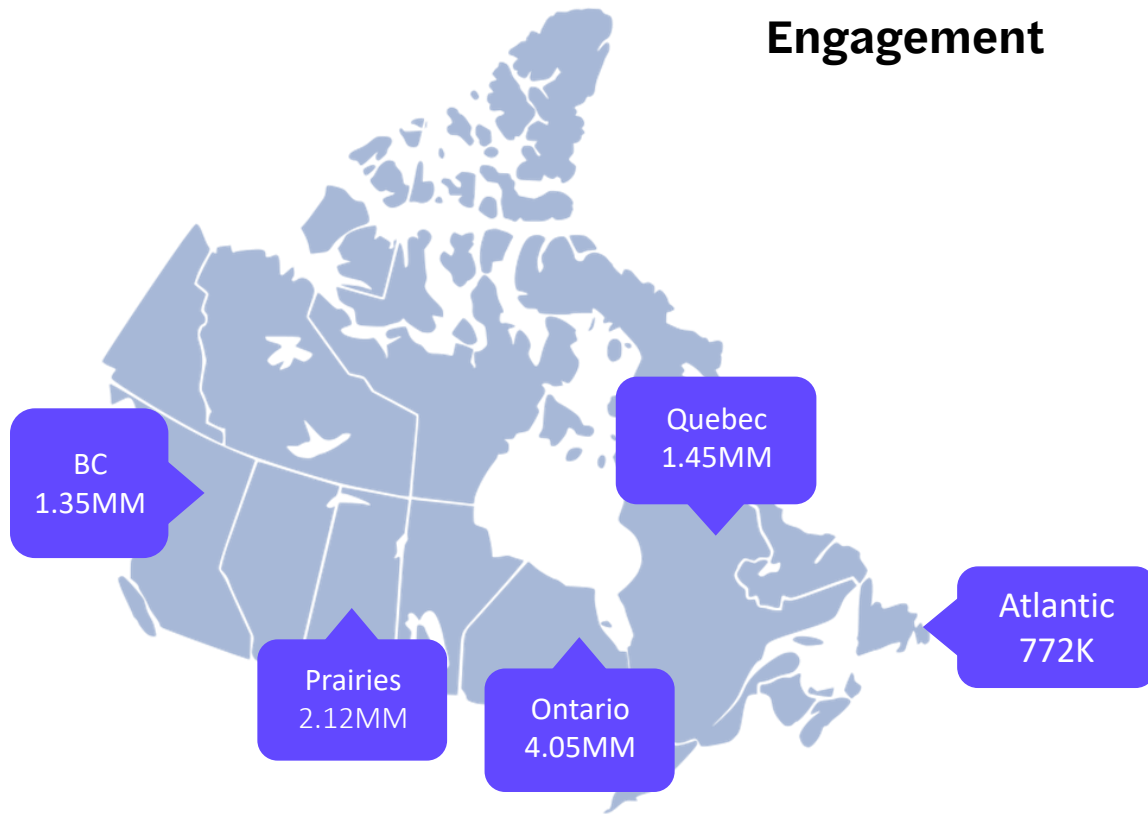
Passionate Engagers
(24% Excited among engaged)

1.7MM

Sponsorship Impact: Purchase Intent
(16% among Total Engaged in Canada)

By the Numbers: Community Fairs

Engagement



National

9.6MM Total Engaged in Canada
(38% Engaged with Agriculture Fairs)

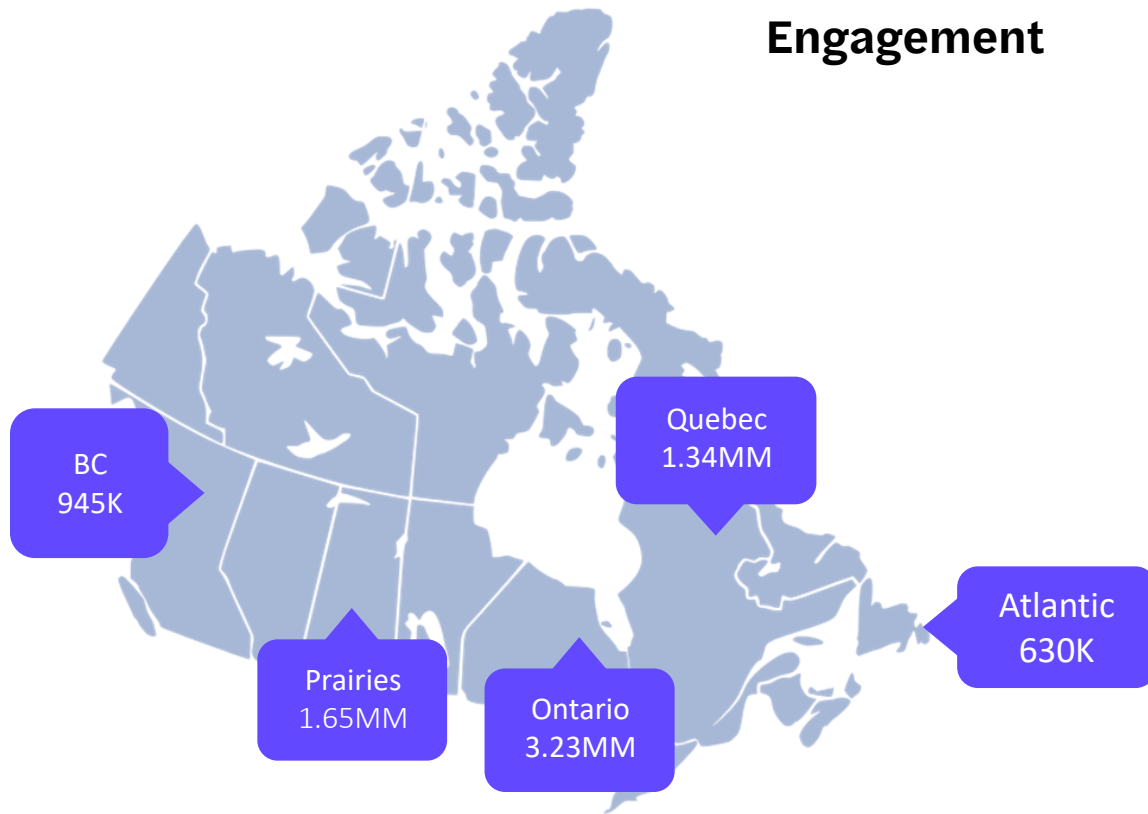
2.2MM Engagers with Increased Interest
(23% Momentum among Engaged)

1.3MM Passionate Engagers
(13% Excited among engaged)

1.2MM Sponsorship Impact: Purchase Intent
(12% among Total Engaged in Canada)

By the Numbers: Agriculture Fairs

Engagement



National

7.9MM Total Engaged in Canada
(31% Engaged with Agriculture Fairs)

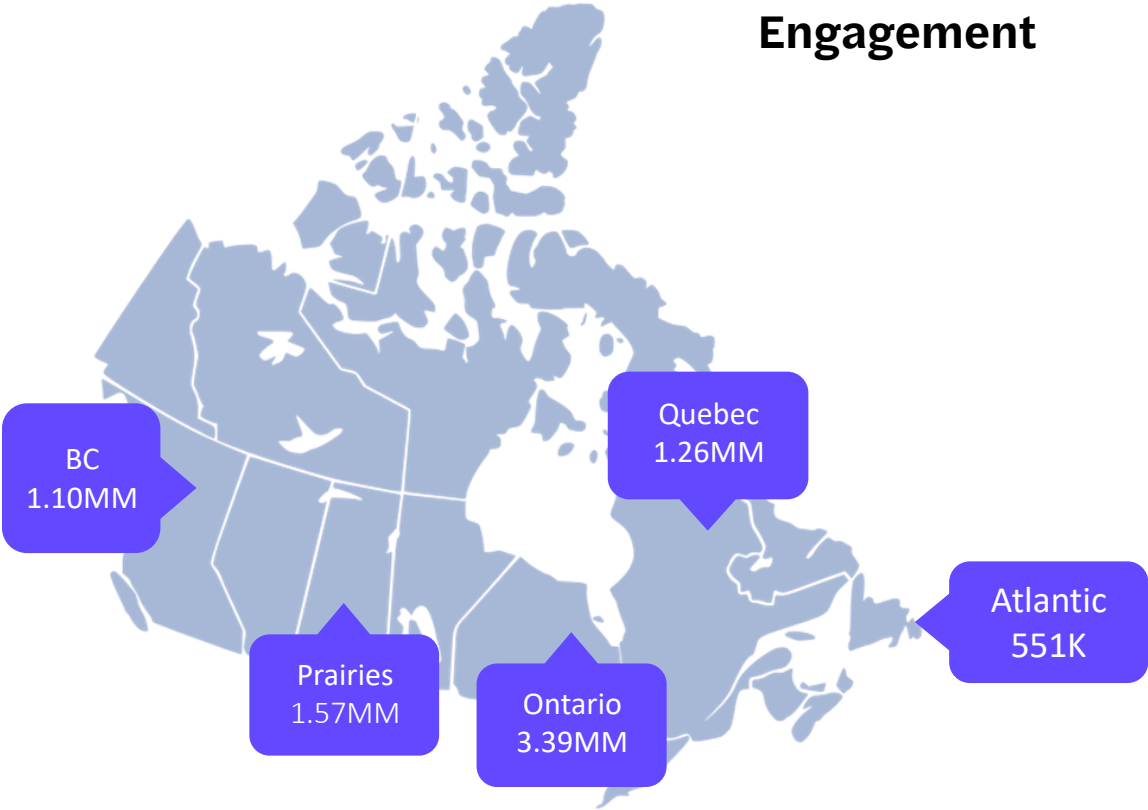
1.3MM Engagers with Increased Interest
(16% Momentum among Engaged)

940K Passionate Engagers
(12% Excited among engaged)

787K Sponsorship Impact: Purchase Intent
(10% among Total Engaged in Canada)

By the Numbers: National Exhibitions

Engagement



National

7.9MM Total Engaged in Canada
(31% Engaged with Agriculture Fairs)

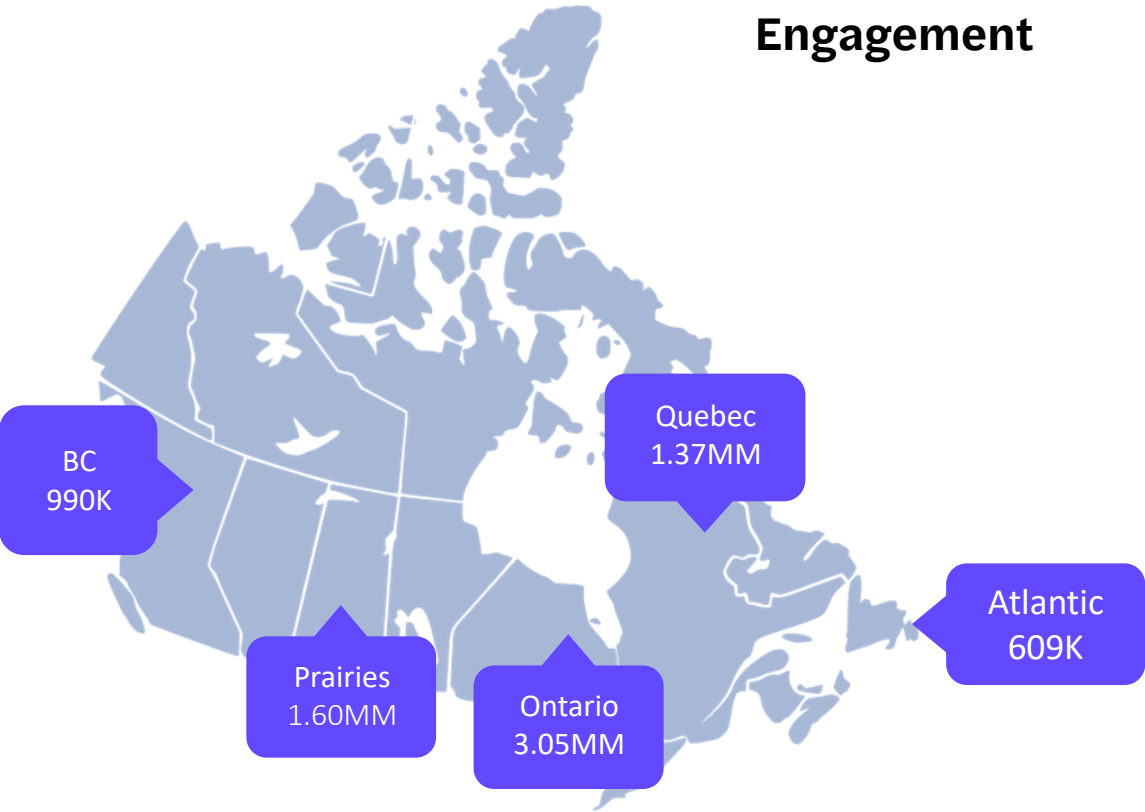
1.2MM Engagers with Increased Interest
(15% Momentum among Engaged)

709K Passionate Engagers
(9% Excited among engaged)

709K Sponsorship Impact: Purchase Intent
(9% among Total Engaged in Canada)

By the Numbers: Regional Exhibitions

Engagement



National

7.6MM Total Engaged in Canada
(30% Engaged with Agriculture Fairs)

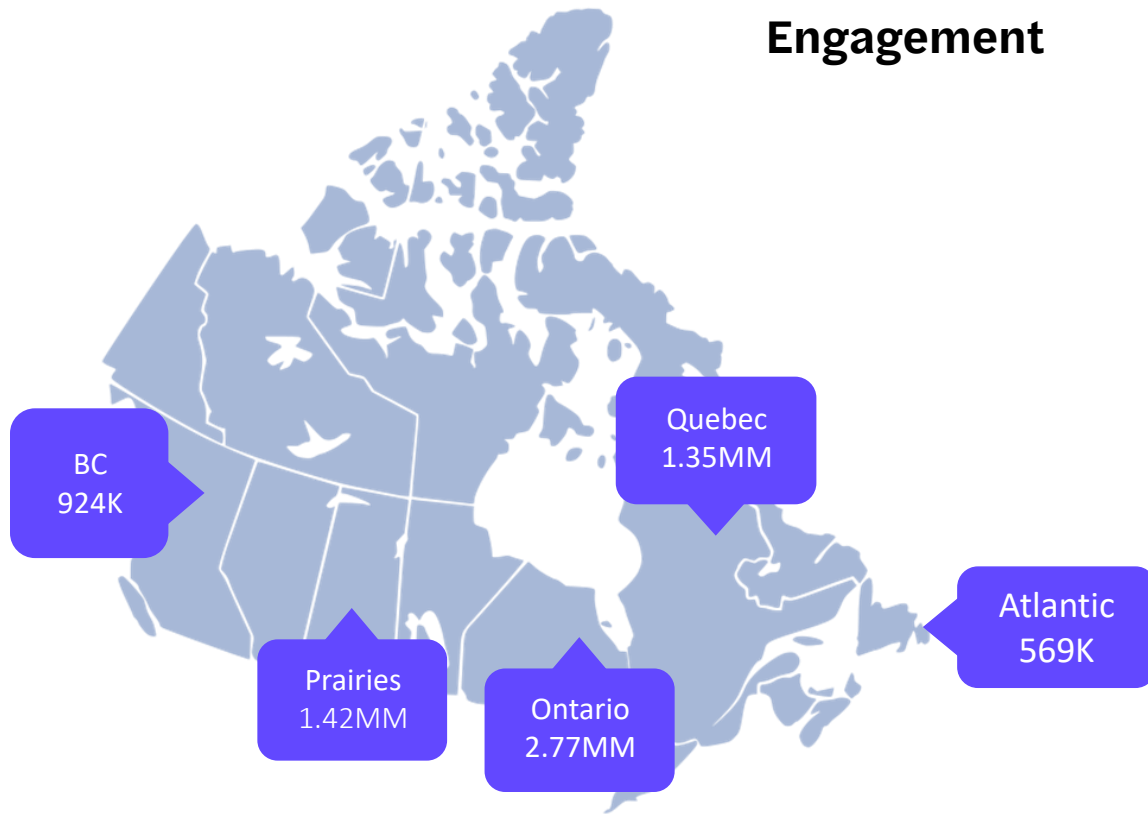
990K Engagers with Increased Interest
(13% Momentum among Engaged)

609K Passionate Engagers
(8% Excited among engaged)

686K Sponsorship Impact: Purchase Intent
(9% among Total Engaged in Canada)

By the Numbers: Agriculture Exhibitions

Engagement



National

7.1MM Total Engaged in Canada
(28% Engaged with Agriculture Fairs)

995K Engagers with Increased Interest
(14% Momentum among Engaged)

711K Passionate Engagers
(10% Excited among engaged)

782K Sponsorship Impact: Purchase Intent
(11% among Total Engaged in Canada)

09

Navigating the Canadian Sponsorship Landscape

The sponsorship industry is **noisy**.



Contending news & views

Data overload & inconsistency

Incomplete storylines

FOMO (Fear of Missing Out)

Every day we're faced with **challenges...**

Growing uncertainty

Proving value for investment

Internal politics

FOBI (Fear of Being Involved)

News cycles would have had us think that the sponsorship industry was **down for the count.**

BUSINESS

COVID-19 crushes Asahi's Olympics sponsorship plans

ON JULY 10, 2021

HOME > RS PRO > MUSIC BIZ FEATURES

DECEMBER 22, 2020 11:32AM ET

When Will Live Music Return?

After a bruising 10 months of Covid shutdown, live music businesses — not to mention artists and fans — are hoping concerts and tours can return in the spring of 2021. But is it a pipe dream?

Tokyo Olympics: Why doesn't Japan cancel the Games?

By Andreas Illmer
BBC News

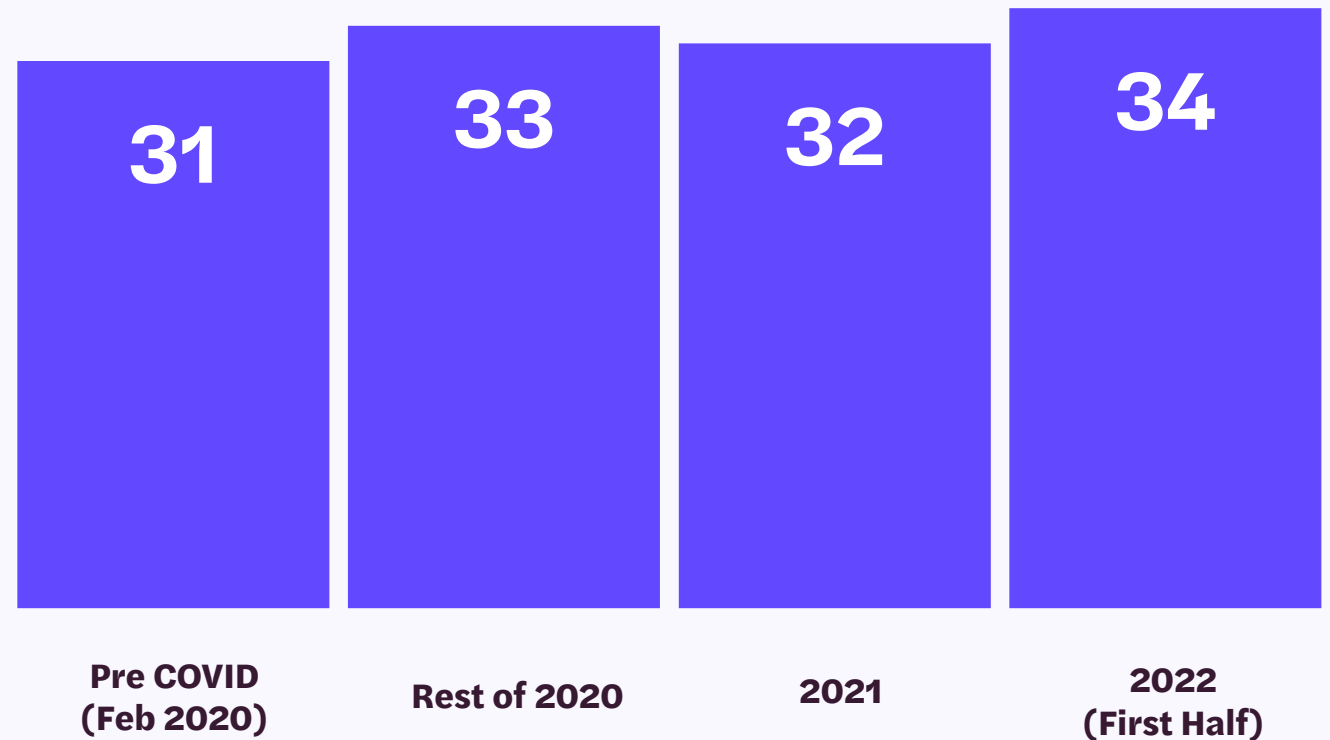
© 15 May 2021

Health expert doubts sports will be played in front of fans before the fall of 2021

Fortune Or Failure? How Covid-19 Will Force Sports Industry To Change

**Impact of sponsorship
on consumers
continues to grow
versus pre-pandemic
levels.**

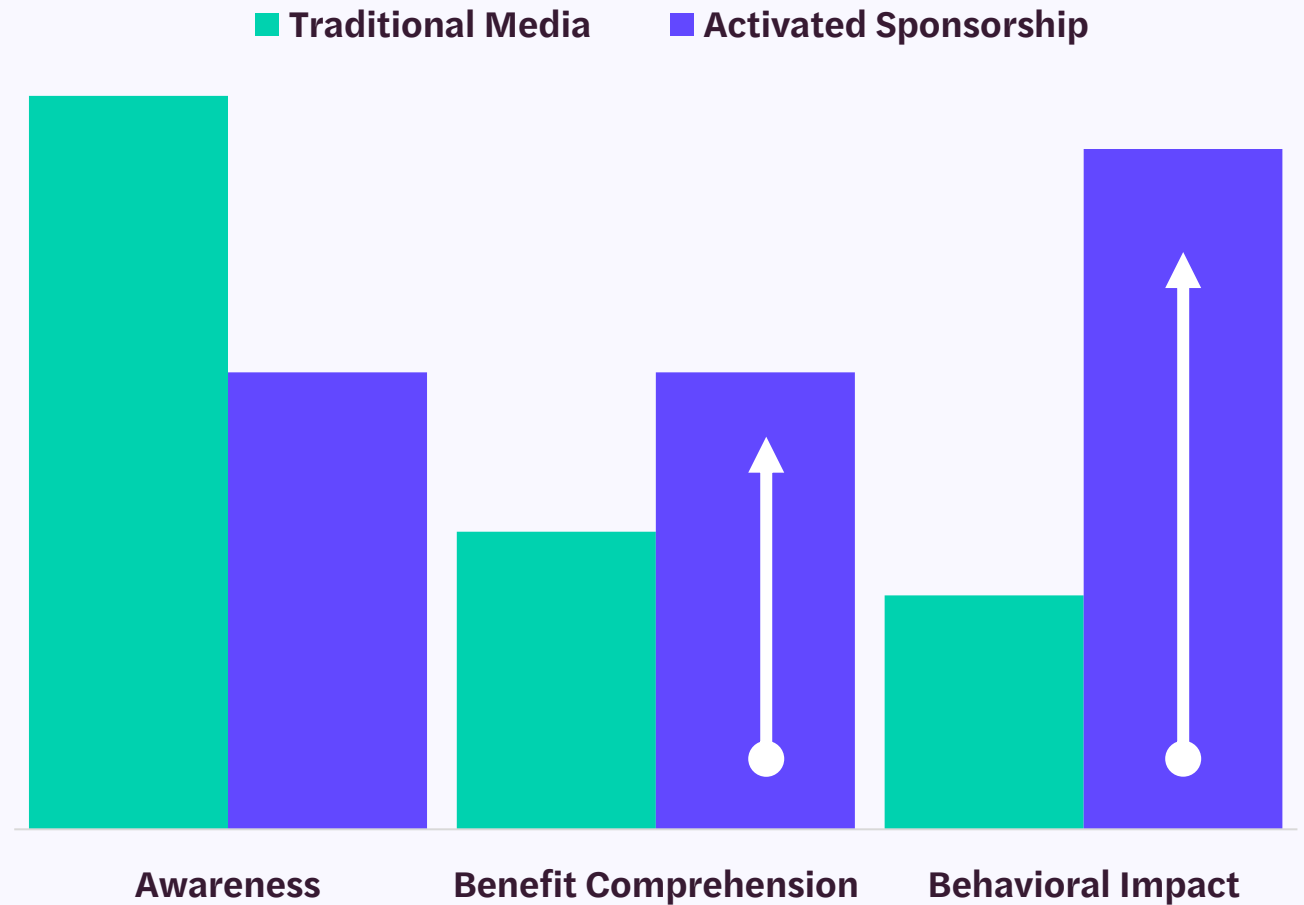
The Impact of Sponsorship in Canada



Why?

Because sponsorship is becoming more **integrated** into marketing as it delivers influence.

Traditional Media vs. Activated Sponsorship Effectiveness Comparison



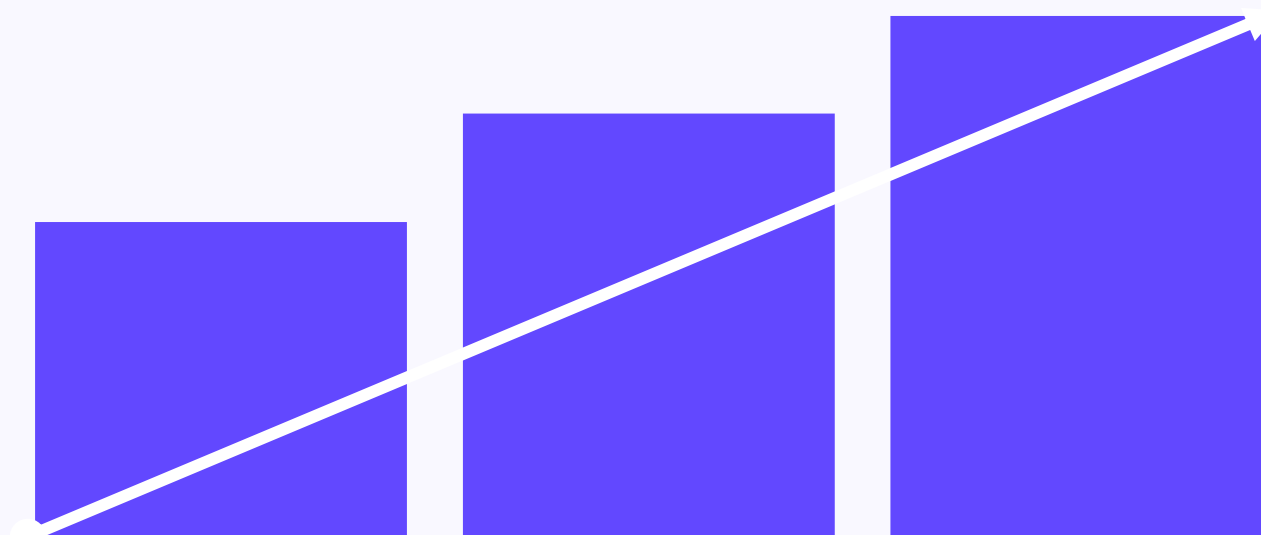
And better recognizing
and integrating the
intersection of consumer
passion-points...



So, what else are
fair & exhibition
visitors
passionate
about?

	Total Population	Fair & Exhibition Visitors	Difference
Play Hockey	19	25	+6%
Buy Cryptocurrency	10	17	+6%
Invest In The Stock Market	33	41	+8%
Focus On Living Today To The Max	69	79	+10%
Donate To A Local Charity	52	63	+11%
Hang Out With Friends	77	89	+12%
Cook With Family	68	81	+13%
Read The Newspaper	56	71	+15%
Use QR Codes	49	65	+16%
Go To A Sit Down Restaurant	69	85	+16%
Play Card Games	59	75	+16%
Listen To Podcasts	40	56	+16%
Garden	56	72	+16%
Camp	36	52	+17%
Make a Wager Online	17	34	+17%
Purchase Because of Sponsorship	32	57	+25%

Activation Impact on Consumers



Association

TV advertising, signage, digital, videoboard, social



Demonstration

Community events, compelling, displays, limited edition, packaging

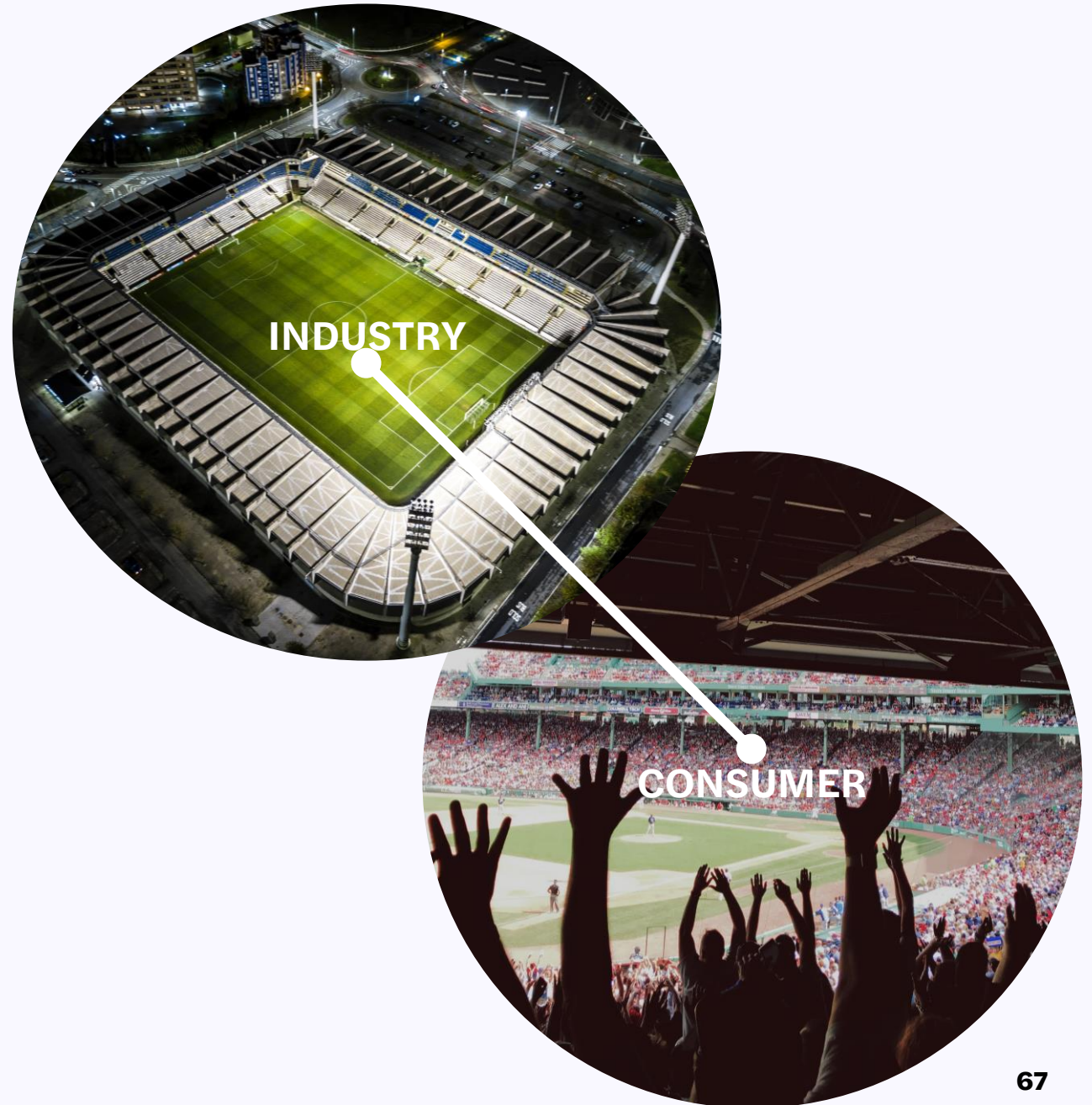


Celebration

Promotions or contests, entertainment areas, causal, integrations

Once we uncover these critical insights, we can develop strategies to connect with our audience and drive greatest gains?

**Bridging the gap
between industry and
consumer perspectives
unlocks key
opportunities.**



10

Exclusive CAFE Member Benefits

Our Solutions

Additional solutions available for each stage of sponsorship decision making and customized to CAFE member needs (at a reduced cost)



Inform

Our Insights Platform provides instant access to real-time data to answer your most pressing questions in sponsorship.

CAFE MEMBER \$2,500 CAD

Rate Card: \$4,500 USD



Value

Spend or sell confidently with fact-based guidance on the current & potential value of your sponsorships with our Opportunity Valuation.

CAFE MEMBER \$12,500 CAD

Rate Card: \$15,000 USD



Connect

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

CAFE MEMBER \$4,500 CAD

Rate Card: \$5,500 USD per



Measure

Leverage data to optimize your sponsorship investments and maximize ROI over time with customized Impact Reports.

CAFE MEMBER \$17,500 CAD

Rate Card: \$25,000 USD



Canadian Association of Fairs & Exhibition 2022 Annual Landscape Study

Prepared For: CAFE

Date: November, 2022





4

Appendix

A 1




Reach & Engagement

CAFE Engagement Member Profiles: CAFE engaged tend to be younger (13-34), Canadian-born, and families. Some variation is seen across CAFE types by gender (i.e., more males attending National/Regional exhibitions vs. females & Seasonal Celebrations/Fairs)

CAFE Engaged Profiles	Agriculture Fairs	Community Fairs	Winter/Christmas/Lights Celebrations and Fairs	Agricultural Exhibitions	National Exhibitions	Regional Exhibitions
	Male	51%	49%	46%	52%	54%
	Female	49%	51%	54%	48%	46%
	13 to 34	55%	50%	51%	55%	53%
	35 to 54	34%	37%	35%	33%	35%
	55 to 64	11%	13%	14%	12%	12%
	Canadian-Born	73%	72%	72%	71%	69%
	Foreign-Born	27%	28%	28%	29%	31%
	Kids <18 in HH	56%	59%	58%	56%	58%
	No Kids <18 in HH	44%	41%	42%	44%	42%

Highlight Indicates over index vs. Gen Pop

Engagement Profiles continued: Higher CAFE engagement is also seen with mid-high income HH's. As seen below, CAFE engagers over-index vs. the general Canadian population in terms of all key categories

CAFE Engaged Profiles	Agriculture Fairs	Community Fairs	Winter/Christmas/Lights Celebrations and Fairs	Agricultural Exhibitions	National Exhibitions	Regional Exhibitions
 HHI: <\$50K	34%	31%	31%	34%	31%	32%
HHI: \$50 - \$100K	39%	40%	39%	39%	40%	40%
HHI: \$100K+	27%	29%	30%	27%	28%	29%
 BC	12%	14%	13%	13%	14%	13%
Prairies	21%	22%	23%	20%	20%	21%
Ontario	41%	42%	41%	39%	43%	40%
Quebec	17%	15%	16%	19%	16%	18%
Atlantic Canada	8%	8%	7%	8%	7%	8%
 *Key Category NET	25%	21%	20%	27%	25%	26%
Key Category – Agricultural	8%	6%	6%	9%	8%	8%
Key Category – Construction	13%	11%	10%	13%	13%	13%
Key Category - Residential	14%	12%	12%	15%	14%	15%

A 2

Passion & Emotional Connection

Key Statements: Variation is seen across custom statements, with the key themes previously seen (family, community, economy) echoed in terms of agreement...

Fair & Exhibition Statements – Total Agree

among Canada General Population



Q.21 Please rate how much you agree with the following statements about Fairs and Exhibitions - Summary - Total Agree
Base: Total Canada (n=2000)



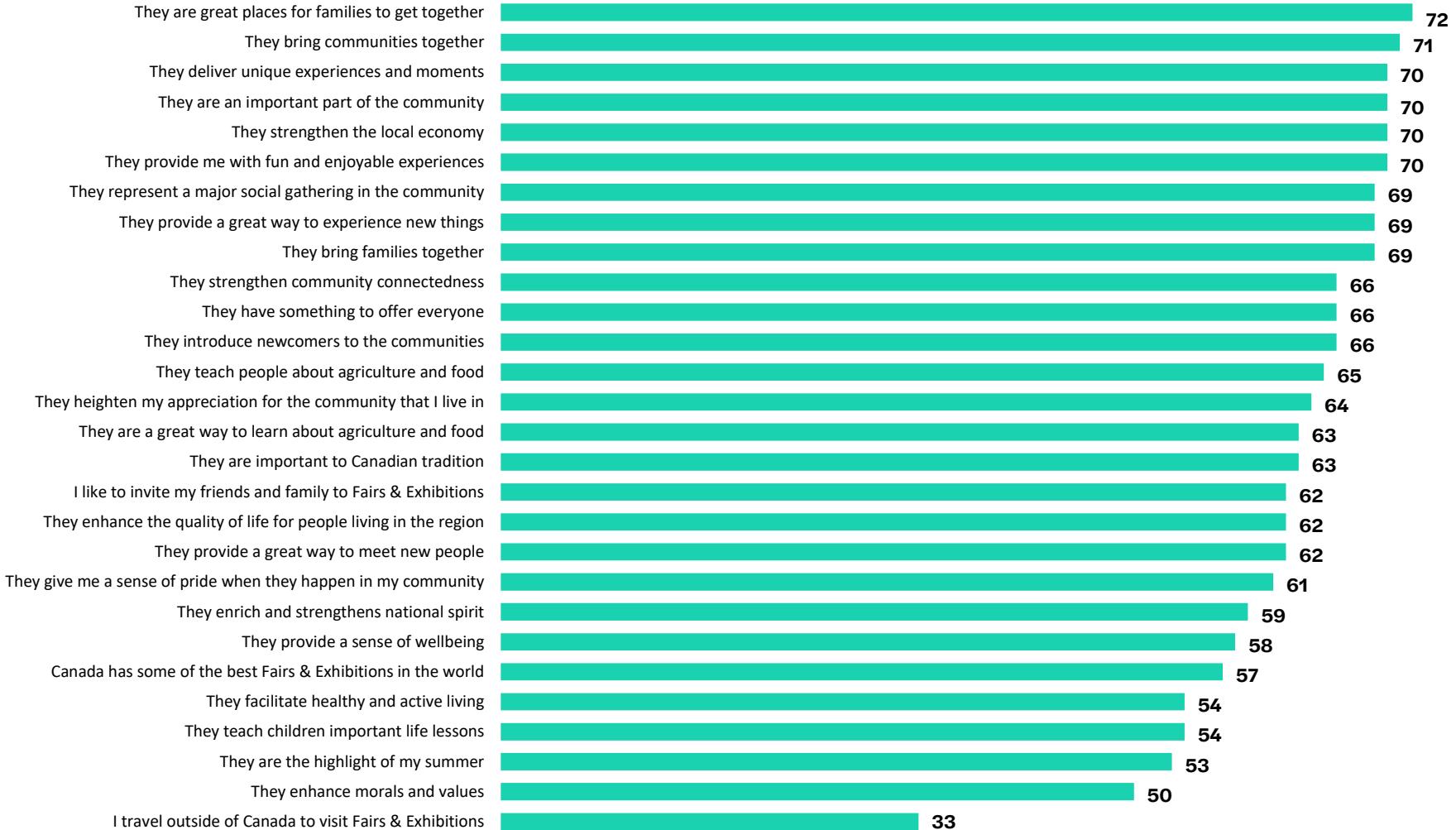
... and similar themes are reiterated among Canadians engaged with CAFE properties, with even higher agreement levels seen across all statements

Fair & Exhibition Statements – Total Agree

among CAFE Portfolio Engaged



Q.21 Please rate how much you agree with the following statements about Fairs and Exhibitions - Summary - Total Agree
 Base: CAFE Engaged (n=1060)



A 3

Association Impact Potential

Brand Favourability Profile: The consistent profile of over-indexers continues among those with elevated brand favourability – females, younger engagers (13-34 y/o), families (kids <18 in HH), mid-high HHIs, and key category purchasers

% CAFE Engaged Brand Favourability



Highlight Indicates over index vs. Gen Pop

Base: Total CAFE Engaged/ Total Canada Gen Pop



42%

Male
50% Gen Pop

58%

Female
50% Gen Pop



51%

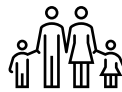
13-34
41% Gen Pop

35%

35-54
39% Gen Pop

14%

55-64
20% Gen Pop



43%

Kids in HHLD <18
33% Gen Pop

57%

No Kids in HHLD
67% Gen Pop

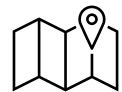


76%

Born in Canada
78% Gen Pop

24%

Foreign Born
22% Gen Pop



35%

West
32% Gen Pop

13%

BC
12% Gen Pop

22%

Prairies
20% Gen Pop

40%

Ontario**
38% Gen Pop

25%

QC + ATL
30% Gen Pop

15%

Quebec
23% Gen Pop

9%

Atlantic Can.
7% Gen Pop



23%

***Key Long-term Category**
13% Gen Pop

77%

***Non-Key Long-term Category**
87% Gen Pop



29%

Under \$50K
34% Gen Pop

44%

\$50-\$100K
39% Gen Pop

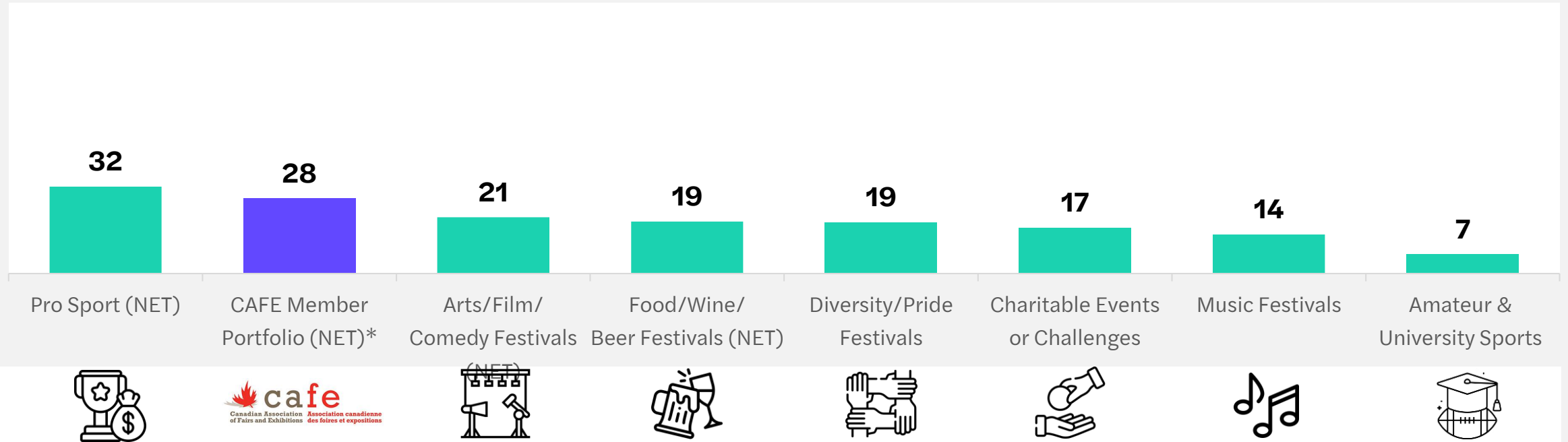
27%

Over \$100K
27% Gen Pop

CAFE engagers show heightened favourability towards exhibition partner brands; at 28%, CAFE nearly matches Pro Sport, while music festivals sees a fall in positioning

Brand Favourability – Lifestyle & Sport Properties

% Engaged 1+ in P12M, Total Canada Engaged with Property



Q.29 Please select the list of properties that apply to the statement below, I feel better towards a brand that sponsors this property.

Base: Canadians 13-64 Engaged with Property

A 4

Category Targeting

CAFE Portfolio Top Categories: Some consistent category over-usage is seen across the portfolio among engagers, with frequency among food, retail, and entertainment

Category Engagement – Top 5

% Engaged in the P12M

#	NET CAFE Portfolio	Agriculture Fairs	Community Fairs	Winter/ Christmas/ Lights Celebrations and Fairs				
1	Watched an award show of any type	23%	Purchase a smart speaker (Amazon Alexa, Google Home...)	18%	Watched an award show of any type	25%	Watched an award show of any type	24%
2	Ordered food from a delivery service (e.g. UberEats, Skip the Dishes, Foodora, Ritual)	31%	Purchase headphones (Bose, Apple, Beats by Dre...)	22%	Purchased tickets to an event online (e.g. Ticketmaster, StubHub...)	23%	Ordered food from a delivery service (e.g. UberEats, Skip the Dishes, Foodora, Ritual)	32%
3	Purchased breakfast foods from a restaurant / store	45%	Purchased a luxury product (watch, handbag, shoes....)	18%	Purchased an energy drink	23%	Purchased tickets to an event online (e.g. Ticketmaster, StubHub...)	23%
4	Ate at a casual restaurant or sports bar	47%	Purchase equipment and machinery products for construction purposes	13%	Purchased high performance apparel from a retailer	17%	Purchased breakfast foods from a restaurant / store	46%
5	Used a delivery service (e.g. FedEx, DHL, UPS...)	31%	Watched an award show of any type	23%	Visited a sporting goods retailer	22%	Purchased a luxury product (watch, handbag, shoes....)	18%

CAFE Portfolio Top Categories continued: Similar top categories occur across the remaining 3 portfolio types – interestingly, the luxury products category is the top performer

Category Engagement – Top 5

% Engaged in the P12M

#	NET CAFE Portfolio	Agricultural Exhibitions	National Exhibitions	Regional Exhibitions
1	Watched an award show of any type	23% Purchased a luxury product (watch, handbag, shoes....)	20% Purchased a luxury product (watch, handbag, shoes....)	20% Purchased a luxury product (watch, handbag, shoes....)
2	Ordered food from a delivery service (e.g. UberEats, Skip the Dishes, Foodora, Ritual)	31% Purchase a smart speaker (Amazon Alexa, Google Home...)	18% Purchase a smart speaker (Amazon Alexa, Google Home...)	18% Purchase headphones (Bose, Apple, Beats by Dre...)
3	Purchased breakfast foods from a restaurant / store	45% Purchase equipment and machinery products for residential purposes (i.e. Landscaping / Snow Removal)	15% Purchased tickets to an event online (e.g. Ticketmaster, StubHub...)	24% Purchase a smart speaker (Amazon Alexa, Google Home...)
4	Ate at a casual restaurant or sports bar	47% Purchase equipment and machinery products for construction purposes	13% Purchase headphones (Bose, Apple, Beats by Dre...)	22% Purchase equipment and machinery products for construction purposes
5	Used a delivery service (e.g. FedEx, DHL, UPS...)	31% Purchase headphones (Bose, Apple, Beats by Dre...)	21% Ordered food from a delivery service (e.g. UberEats, Skip the Dishes, Foodora, Ritual)	32% Purchase a home appliance

CAFE Engagement: All Purchase Categories (%)

#	NET CAFE Portfolio Category	S/L	Gen Pop	NET CAFE	A	B	C	D	E	F
1	Watched an award show of any type	S	16%	23%	23%	25%	24%	23%	23%	23%
2	Ordered food from a delivery service (e.g. UberEats, Skip the Dishes, Foodora, Ritual)	S	25%	31%	29%	31%	32%	28%	32%	29%
3	Purchased breakfast foods from a restaurant / store	S	39%	45%	40%	44%	46%	38%	38%	38%
4	<i>*NET Key LCategory</i>	L	13%	19%	25%	21%	20%	27%	25%	26%
5	Ate at a casual restaurant or sports bar	S	41%	47%	39%	47%	46%	36%	38%	40%
6	Used a delivery service (e.g. FedEx, DHL, UPS...)	S	25%	31%	29%	31%	31%	26%	31%	29%
7	Visited a sporting goods retailer	S	16%	22%	20%	22%	21%	20%	21%	22%
8	Purchased tickets to an event online (e.g. Ticketmaster, StubHub...)	S	16%	22%	21%	23%	23%	20%	24%	23%
9	Purchased a luxury product (watch, handbag, shoes....)	S	11%	17%	18%	17%	18%	20%	20%	20%
10	Used a music streaming service (e.g. Spotify, Pandora, Apple Music)	S	35%	41%	36%	39%	40%	35%	36%	35%
11	Purchased a sport drink	S	22%	27%	25%	28%	28%	24%	27%	26%

Column Abbreviations					
S/L	S: Short-Term Category (3 Months) L: Long-Term Category (18 Months)				
A	Agriculture Fairs	C	Winter/Christmas/ Lights Celebrations and Fairs	E	National Exhibitions
B	Community Fairs	D	Agricultural Exhibitions	F	Regional Exhibitions

**Key Category NET – Purchase Equipment/Machinery Products (Agricultural, Construction, or Residential Purposes) – N18M*

CAFE Engagement: All Purchase Categories (%)

#	NET CAFE Portfolio Category	S/L	Gen Pop	NET CAFE	A	B	C	D	E	F
12	Book travel online or through a tourism agency	L	21%	26%	21%	26%	26%	20%	24%	22%
13	Purchased a consumer electronic (Computer, TV, speakers, headphones...)	S	20%	25%	25%	25%	25%	25%	25%	26%
14	Purchased an energy drink	S	17%	22%	23%	23%	23%	23%	24%	24%
15	Purchased international foods	S	26%	31%	27%	31%	32%	26%	30%	30%
16	Purchased high performance apparel from a retailer	S	10%	15%	16%	17%	16%	16%	18%	17%
17	Stay at a hotel or resort	L	34%	39%	31%	37%	40%	29%	32%	31%
18	Visited recreational or fitness facilities	S	14%	19%	19%	19%	21%	19%	20%	21%
19	Purchase a home appliance	L	18%	22%	23%	22%	23%	22%	24%	25%
20	Purchase headphones (Bose, Apple, Beats by Dre...)	L	14%	19%	22%	20%	19%	21%	22%	22%
21	Purchase a smart speaker (Amazon Alexa, Google Home...)	L	10%	15%	18%	16%	15%	18%	18%	18%
22	Used a streaming service (e.g. Hulu, Netflix, Amazon)	S	53%	58%	51%	55%	57%	48%	50%	49%

Column Abbreviations						
S/L	S: Short-Term Category (3 Months) L: Long-Term Category (18 Months)					
A	Agriculture Fairs	C	Winter/Christmas/ Lights Celebrations and Fairs		E	National Exhibitions
B	Community Fairs	D	Agricultural Exhibitions		F	Regional Exhibitions

CAFE Engagement: All Purchase Categories (%)

#	NET CAFE Portfolio Category	S/L	Gen Pop	NET CAFE	A	B	C	D	E	F
23	Ate at a quick service restaurant (e.g. fast food, coffee shops, etc.)	S	53%	58%	50%	55%	56%	47%	48%	49%
24	Purchase a sporting good from a retailer	L	14%	19%	19%	20%	19%	20%	20%	20%
25	Purchased liquor or spirits	S	36%	40%	34%	38%	38%	32%	34%	33%
26	Purchase new tires for a vehicle	L	17%	21%	22%	22%	22%	21%	20%	21%
27	Visit a casino	L	15%	19%	17%	19%	19%	14%	18%	17%
28	Used a mobile payment provider (e.g. Paypal, BitPay, Google Wallet)	S	32%	37%	34%	36%	36%	32%	35%	34%
29	Purchase a new smartphone	L	26%	30%	27%	29%	30%	28%	29%	29%
30	Purchased a ride from a ride-sharing platform (Uber, Lyft)	S	12%	16%	16%	17%	17%	15%	18%	16%
31	Purchased clothing from a retailer	S	44%	48%	42%	46%	47%	38%	42%	41%
32	Purchased auto parts	S	13%	17%	20%	18%	18%	19%	18%	18%
33	Played video games	S	30%	34%	29%	32%	33%	28%	29%	31%

Column Abbreviations					
S/L	S: Short-Term Category (3 Months) L: Long-Term Category (18 Months)				
A	Agriculture Fairs	C	Winter/Christmas/ Lights Celebrations and Fairs	E	National Exhibitions
B	Community Fairs	D	Agricultural Exhibitions	F	Regional Exhibitions

CAFE Engagement: All Purchase Categories (%)

#	NET CAFE Portfolio Category	S/L	Gen Pop	NET CAFE	A	B	C	D	E	F
34	Interest in purchasing cannabis	L	15%	19%	19%	20%	20%	18%	19%	18%
35	Purchased wine	S	33%	37%	31%	34%	35%	31%	32%	32%
36	Purchased coffee (restaurant, store)	S	51%	55%	47%	52%	53%	45%	47%	46%
37	Purchase airline tickets	L	26%	30%	23%	28%	29%	22%	27%	26%
38	Purchased vitamins or supplements	S	33%	37%	32%	36%	38%	30%	33%	33%
39	**Purchase equipment and machinery products for residential purposes (i.e. Landscaping / Snow Removal)	L	8%	11%	14%	12%	12%	15%	14%	15%
40	Taken public transit	S	24%	27%	23%	26%	27%	22%	28%	26%
41	Switch your banking to another institution	L	8%	11%	14%	13%	11%	14%	14%	14%
42	**Purchase equipment and machinery products for construction purposes	L	6%	9%	13%	11%	10%	13%	13%	13%
43	Purchase or lease a vehicle	L	14%	18%	17%	17%	18%	16%	17%	17%
44	Purchased beer	S	36%	39%	36%	37%	38%	34%	35%	35%

Column Abbreviations					
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**Key Category NET – Purchase Equipment/Machinery Products (Agricultural, Construction, or Residential Purposes) – N18M

CAFE Engagement: All Purchase Categories (%)

#	NET CAFE Portfolio Category	S/L	Gen Pop	NET CAFE	A	B	C	D	E	F
45	Purchased cereal or a snack bar	S	45%	48%	41%	46%	48%	38%	39%	39%
46	Apply for a credit card	L	12%	15%	15%	16%	16%	14%	17%	16%
47	Purchased at-home COVID testing	S	10%	13%	16%	14%	15%	17%	14%	15%
48	Purchased chocolate, gum or candy	S	54%	57%	48%	54%	56%	45%	48%	47%
49	Used a Buy Now Pay Later service	L	7%	10%	12%	10%	11%	12%	13%	12%
50	Purchase a new home/condo	L	7%	10%	12%	11%	10%	11%	11%	11%
51	Use business consulting services	L	4%	7%	9%	8%	8%	10%	10%	10%
52	Rented a vehicle	S	6%	9%	9%	10%	9%	10%	11%	10%
53	Influence decisions for business software/cloud solutions	L	5%	7%	10%	9%	8%	12%	11%	11%
54	Purchased non-alcoholic beer	S	8%	10%	13%	12%	11%	14%	14%	13%
55	Get or renew a mortgage	L	8%	10%	12%	11%	11%	12%	12%	12%

Column Abbreviations					
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CAFE Engagement: All Purchase Categories (%)

#	NET CAFE Portfolio Category	S/L	Gen Pop	NET CAFE	A	B	C	D	E	F
56	Placed bets on a fantasy gaming website	S	5%	8%	9%	9%	8%	10%	10%	10%
58	Purchased personal care products (hair, body, face care)	S	54%	57%	47%	55%	56%	46%	47%	47%
59	Purchase Non-Fungible Token (NFT) or a digital collectible	L	5%	7%	10%	8%	7%	11%	10%	10%
60	Consult with an investment advisor	L	17%	19%	20%	20%	19%	18%	19%	20%
61	Used a dating website or app (Bumble, Tinder, Match...)	S	7%	10%	11%	11%	10%	10%	12%	11%
62	Invest \$25,000 or more in the next 12 months	L	11%	13%	15%	14%	14%	16%	16%	17%
63	Purchase or lease an electric vehicle	L	6%	8%	10%	9%	9%	11%	11%	11%
64	Purchased pet food	S	34%	36%	34%	35%	36%	32%	32%	30%
65	Considering investing in cryptocurrency	L	8%	10%	13%	12%	12%	13%	13%	13%
66	Purchase insurance	L	20%	22%	21%	22%	21%	20%	20%	21%
67	Purchased juice	S	48%	49%	42%	47%	48%	41%	41%	43%

Column Abbreviations					
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CAFE Engagement: All Purchase Categories (%)

#	NET CAFE Portfolio Category	S/L	Gen Pop	NET CAFE	A	B	C	D	E	F
68	**Purchase equipment and machinery products for agricultural purposes	L	4%	5%	8%	6%	6%	9%	8%	8%
69	Purchased from a mass merchandiser retailer (e.g. Walmart)	S	51%	53%	44%	49%	51%	43%	42%	43%
70	Placed bets on a sporting event	S	7%	9%	10%	10%	9%	10%	11%	10%
71	Switch telecommunications providers	L	9%	11%	13%	12%	12%	13%	14%	14%
72	Purchased from an online retailer (e.g. Amazon, AliExpress, eBay)	S	49%	50%	43%	47%	51%	41%	44%	44%
73	Purchased a lottery ticket	S	37%	39%	36%	40%	37%	34%	35%	35%
74	Purchase eyewear	L	24%	25%	26%	26%	25%	23%	23%	24%
75	Purchased a soda / soft drink	S	52%	53%	46%	51%	52%	42%	44%	46%
76	Purchased a paper product (paper towel, toilet paper...)	S	56%	56%	49%	53%	55%	46%	47%	48%
77	Purchased salty snacks or cookies	S	57%	57%	51%	55%	57%	46%	48%	48%
78	Purchase household products	L	45%	45%	40%	44%	44%	37%	36%	39%

Column Abbreviations					
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*Key Category NET – Purchase Equipment/Machinery Products (Agricultural, Construction, or Residential Purposes) – N18M

CAFE Engagement: All Purchase Categories (%)

#	NET CAFE Portfolio Category	S/L	Gen Pop	NET CAFE	A	B	C	D	E	F
79	Purchased gas	S	54%	53%	44%	49%	51%	42%	43%	43%
80	Used a loyalty/rewards program	S	54%	52%	43%	48%	50%	39%	40%	41%
81	Purchased a dairy product	S	59%	56%	46%	52%	53%	43%	44%	46%
82	Purchased a product from a grocery store	S	63%	60%	49%	55%	58%	47%	49%	50%

Column Abbreviations					
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A 5

Brand Targeting

CAFE Portfolio Top Brands: Some differentiation is seen with top brand usage among 3 of the CAFE portfolio types, with key brand Pizza Pizza/ Pizza 73 performing well

Brand Engagement – Top 5

% Engaged in the P12M

#	NET CAFE Portfolio	Agriculture Fairs	Community Fairs	Winter/ Christmas/ Lights Celebrations and Fairs
1	Starbucks	34% Aquafina	14% Pizza Pizza/Pizza 73	18% Starbucks 35%
2	Hershey	22% Dr Pepper	16% Gatorade	23% Hershey 24%
3	Tim Hortons	58% Gatorade	22% Hershey	23% McCafe 34%
4	McCafe	33% Second Cup Coffee Co	10% DASANI	14% Pizza Pizza/Pizza 73 18%
5	Nintendo	19% Hershey	21% Aquafina	14% Aquafina 14%

CAFE Portfolio Top Brands continued: Some top brand consistency is seen among the other 3 portfolio types, though Molson Canadian jumps into the top 5 for the exhibition types

Brand Engagement – Top 5

% Engaged in the P12M

#	NET CAFE Portfolio	Agricultural Exhibitions	National Exhibitions	Regional Exhibitions
1	Starbucks	34% Molson Canadian	15% Pizza Pizza/Pizza 73	20% Red Bull
2	Hershey	22% Pizza Pizza/Pizza 73	17% Monster Energy	12% Molson Canadian
3	Tim Hortons	58% Second Cup Coffee Co	10% L'Oreal	20% L'Oreal
4	McCafe	33% Nescafe	21% Nescafe	21% Pizza Pizza/Pizza 73
5	Nintendo	19% Aquafina	13% Red Bull	14% Aquafina

CAFE Engagement: All Brands (%)

#	NET CAFE Portfolio Brand	S/L	Gen Pop	NET CAFE	A	B	C	D	E	F
1	Starbucks	28%	34%	30%	32%	35%	29%	30%	30%	1
2	Hershey	17%	22%	21%	23%	24%	21%	22%	22%	2
3	Tim Hortons	53%	58%	51%	56%	58%	48%	51%	51%	3
4	McCafe	28%	33%	29%	32%	34%	29%	29%	29%	4
5	Nintendo	15%	19%	17%	17%	19%	14%	16%	16%	5
6	Aquafina	9%	14%	14%	14%	14%	13%	14%	14%	6
7	Air Canada	21%	26%	23%	25%	26%	21%	24%	24%	7
8	**Pizza Pizza/Pizza 73	13%	17%	16%	18%	18%	17%	20%	17%	8
9	Nescafe	16%	21%	20%	20%	20%	21%	21%	21%	9
10	Maple Leaf Foods	20%	24%	23%	25%	24%	24%	24%	24%	10
11	DASANI	9%	13%	12%	14%	13%	11%	12%	12%	11

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*Key Brand

CAFE Engagement: All Brands (%)

#	NET CAFE Portfolio Brand	S/L	Gen Pop	NET CAFE	A	B	C	D	E	F
12	Vitamin Water	10%	13%	13%	14%	14%	13%	13%	13%	12
13	Red Bull	9%	13%	13%	13%	13%	13%	14%	15%	13
14	Gatorade	18%	22%	22%	23%	22%	21%	22%	22%	14
15	Molson Canadian	10%	14%	14%	15%	14%	15%	14%	16%	15
16	Canada Dry	25%	28%	26%	28%	29%	24%	26%	24%	16
17	Colgate	31%	35%	30%	32%	34%	30%	31%	31%	17
18	Home Depot	23%	27%	24%	26%	26%	22%	24%	24%	18
19	Nivea	11%	14%	14%	14%	15%	14%	15%	15%	19
20	Microsoft Xbox	10%	13%	14%	14%	13%	14%	14%	15%	20
21	Mr. Clean	17%	20%	21%	21%	21%	20%	19%	20%	21
22	Nestle	25%	28%	26%	29%	29%	25%	27%	27%	22

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CAFE Engagement: All Brands (%)

#	NET CAFE Portfolio Brand	S/L	Gen Pop	NET CAFE	A	B	C	D	E	F
23	L'Oreal	15%	18%	18%	20%	19%	19%	20%	20%	23
24	Minute Maid	15%	19%	17%	19%	20%	17%	20%	18%	24
25	Post Foods cereal brands (Alpha-Bits, Honeycomb, etc.)	15%	18%	18%	19%	19%	17%	18%	18%	25
26	Budwesier	13%	16%	16%	16%	17%	17%	16%	17%	26
27	Gillette	19%	22%	20%	22%	21%	21%	20%	23%	27
28	WestJet	13%	16%	15%	17%	16%	14%	15%	15%	28
29	Monster Energy	7%	10%	10%	10%	10%	10%	12%	11%	29
30	Second Cup Coffee Co	6%	9%	10%	10%	10%	10%	10%	10%	30
31	Dr Pepper	11%	14%	16%	14%	15%	14%	14%	14%	31
32	Fanta	7%	10%	10%	11%	11%	11%	11%	11%	32
33	Johnson & Johnson	16%	19%	18%	19%	20%	18%	19%	19%	33

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CAFE Engagement: All Brands (%)

#	NET CAFE Portfolio Brand	S/L	Gen Pop	NET CAFE	A	B	C	D	E	F
34	Tide	24%	26%	21%	26%	26%	20%	23%	23%	34
35	Lowe's	7%	10%	11%	11%	10%	10%	11%	11%	35
36	Old Spice	10%	13%	13%	14%	13%	13%	12%	14%	36
37	Diet Coke	15%	17%	17%	17%	18%	17%	19%	19%	37
38	Powerade	10%	13%	14%	13%	13%	14%	13%	13%	38
39	**Pizza Nova	5%	7%	8%	8%	9%	8%	10%	9%	39
40	Dove	27%	29%	27%	29%	30%	25%	25%	26%	40
41	Sony Playstation	12%	14%	15%	15%	14%	14%	15%	16%	41
42	Coca-Cola	33%	35%	31%	35%	34%	30%	32%	30%	42
43	Mountain Dew	9%	12%	13%	12%	12%	12%	12%	12%	43
44	SC Johnson	7%	9%	10%	10%	10%	11%	10%	11%	44

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*Key Brand

CAFE Engagement: All Brands (%)

#	NET CAFE Portfolio Brand	S/L	Gen Pop	NET CAFE	A	B	C	D	E	F
45	Pepsi No Sugar	8%	10%	12%	11%	11%	12%	11%	12%	45
46	Pepsi	26%	28%	25%	29%	29%	26%	27%	27%	46
47	Tropicana	17%	19%	18%	19%	19%	18%	19%	18%	47
48	Pepsi Max	6%	8%	9%	9%	9%	9%	9%	9%	48
49	Enterprise Rent-A-Car	4%	7%	8%	7%	7%	7%	8%	7%	49
50	Kotex	6%	8%	9%	9%	9%	9%	10%	9%	50
51	Huggies	5%	7%	7%	7%	7%	6%	7%	6%	51
52	**Wrangler	3%	5%	6%	6%	5%	6%	6%	6%	52
53	Schneiders	11%	13%	12%	13%	13%	11%	13%	12%	53
54	Sprite	15%	17%	17%	17%	19%	17%	18%	17%	54
55	American Express	8%	10%	8%	9%	9%	9%	10%	10%	55

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*Key Brand

CAFE Engagement: All Brands (%)

#	NET CAFE Portfolio Brand	S/L	Gen Pop	NET CAFE	A	B	C	D	E	F
56	PC Financial	16%	18%	18%	17%	18%	17%	18%	18%	56
57	Cavendish Farms	15%	17%	17%	17%	17%	16%	16%	16%	57
58	**BeaverTails	3%	5%	6%	5%	6%	6%	5%	6%	58
59	Coke Zero	15%	17%	17%	17%	16%	16%	17%	16%	59
60	McCain Foods	24%	25%	22%	25%	27%	20%	22%	21%	60
61	Degree	7%	9%	9%	9%	9%	9%	9%	9%	61
62	Scotiabank	17%	18%	16%	18%	18%	16%	18%	16%	62
63	Microsoft Surface	5%	7%	9%	8%	8%	9%	9%	9%	63
64	Pampers	4%	6%	7%	7%	7%	7%	6%	6%	64
65	Tesla	3%	4%	6%	5%	5%	6%	6%	6%	65
66	Nabob	5%	6%	6%	6%	6%	6%	6%	6%	66

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*Key Brand

CAFE Engagement: All Brands (%)

#	NET CAFE Portfolio Brand	S/L	Gen Pop	NET CAFE	A	B	C	D	E	F
67	Chevrolet	7%	8%	10%	9%	8%	10%	10%	9%	67
68	Bounty	14%	15%	14%	15%	16%	13%	13%	14%	68
69	**Vizzy	4%	5%	6%	6%	5%	6%	7%	7%	69
70	MGD (Miller Genuine Draft)	3%	5%	6%	5%	5%	7%	6%	6%	70
71	Diet Pepsi	13%	14%	14%	15%	15%	15%	13%	14%	71
72	TELUS	18%	20%	18%	21%	20%	19%	18%	19%	72
73	President's Choice	32%	33%	29%	32%	33%	26%	27%	27%	73
74	Folgers	10%	11%	12%	10%	11%	12%	12%	12%	74
75	Axe	6%	8%	8%	7%	8%	7%	6%	7%	75
76	Head & Shoulders	13%	15%	14%	16%	15%	15%	14%	15%	76
77	Kia	4%	5%	6%	5%	5%	5%	5%	5%	77

Column Abbreviations					
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*Key Brand

CAFE Engagement: All Brands (%)

#	NET CAFE Portfolio Brand	S/L	Gen Pop	NET CAFE	A	B	C	D	E	F
78	Canadian Tire	42%	43%	38%	41%	42%	36%	36%	38%	78
79	Budget	3%	4%	6%	6%	5%	6%	5%	6%	79
80	Visa	39%	40%	34%	36%	39%	33%	33%	35%	80
81	**GoGo Squeez	4%	5%	6%	5%	6%	7%	6%	6%	81
82	Ford	8%	9%	9%	9%	10%	9%	8%	8%	82
83	Acura	2%	3%	5%	4%	4%	5%	5%	5%	83
84	Hertz	2%	4%	5%	4%	4%	5%	5%	5%	84
85	**Dippin'Dots	2%	3%	4%	3%	4%	4%	4%	4%	85
86	RBC	19%	20%	18%	19%	21%	17%	18%	17%	86
87	Mercedes-Benz	3%	4%	6%	5%	5%	6%	6%	6%	87
88	Avis	2%	4%	5%	4%	4%	5%	5%	5%	88

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*Key Brand

CAFE Engagement: All Brands (%)

#	NET CAFE Portfolio Brand	S/L	Gen Pop	NET CAFE	A	B	C	D	E	F
89	**VQA Wines	4%	5%	6%	5%	5%	7%	6%	6%	89
90	TD	22%	23%	21%	22%	22%	20%	21%	21%	90
91	BioSteel	3%	4%	6%	5%	4%	5%	5%	5%	91
92	National	2%	3%	3%	3%	3%	4%	4%	4%	92
93	Toyota	12%	13%	13%	12%	13%	12%	13%	14%	93
93	Always	10%	11%	10%	10%	12%	10%	10%	10%	93
94	Michelob Ultra	3%	4%	4%	5%	4%	5%	5%	4%	94
95	Shaw	11%	12%	12%	13%	12%	11%	12%	11%	95
96	MBNA	4%	5%	6%	6%	6%	6%	7%	7%	96
97	BMW	3%	4%	5%	5%	4%	6%	5%	6%	97
98	Infiniti	1%	2%	4%	3%	3%	4%	4%	4%	98

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*Key Brand

CAFE Engagement: All Brands (%)

#	NET CAFE Portfolio Brand	S/L	Gen Pop	NET CAFE	A	B	C	D	E	F
99	GM	4%	5%	6%	5%	5%	6%	6%	6%	99
100	Alamo	2%	3%	4%	3%	3%	4%	4%	4%	100
101	Rona	10%	10%	11%	11%	10%	11%	10%	11%	101
102	Honda	10%	11%	11%	11%	11%	10%	12%	11%	102
103	Nissan	7%	7%	8%	8%	8%	8%	7%	7%	103
104	**John Deere	3%	4%	6%	5%	4%	5%	4%	5%	104
105	Discover	2%	3%	4%	3%	3%	5%	4%	4%	105
106	Audi	2%	3%	4%	4%	4%	4%	4%	5%	106
107	MNP	1%	2%	3%	2%	2%	3%	3%	3%	107
108	Deloitte	2%	2%	4%	3%	3%	4%	3%	4%	108
109	Volkswagen	3%	4%	5%	4%	4%	5%	5%	5%	109

Column Abbreviations					
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*Key Brand

CAFE Engagement: All Brands (%)

#	NET CAFE Portfolio Brand	S/L	Gen Pop	NET CAFE	A	B	C	D	E	F
110	CIBC	17%	17%	18%	19%	18%	18%	17%	16%	110
111	**Kubota	1%	2%	3%	2%	2%	3%	2%	2%	111
112	Zenni	2%	2%	3%	2%	2%	3%	2%	2%	112
113	Crest	23%	24%	19%	22%	23%	18%	18%	20%	113
114	Interac	35%	35%	27%	33%	33%	26%	28%	27%	114
115	PC Optimum Points	44%	44%	38%	42%	43%	35%	37%	34%	115
116	Rogers	18%	18%	15%	16%	18%	13%	16%	15%	116
117	Bell	17%	18%	16%	17%	16%	17%	16%	18%	117
118	Petro Points	15%	15%	15%	16%	16%	14%	14%	14%	118
119	Hyundai	9%	9%	9%	9%	10%	9%	10%	9%	119
120	Aeroplan	13%	13%	11%	12%	13%	10%	10%	12%	120

Column Abbreviations					
S/L	S: Short-Term Category (3 Months) L: Long-Term Category (18 Months)				
A	Agriculture Fairs	C	Winter/Christmas/ Lights Celebrations and Fairs	E	National Exhibitions
B	Community Fairs	D	Agricultural Exhibitions	F	Regional Exhibitions

*Key Brand

CAFE Engagement: All Brands (%)

#	NET CAFE Portfolio Brand	S/L	Gen Pop	NET CAFE	A	B	C	D	E	F
121	BMO	15%	15%	14%	16%	16%	14%	17%	16%	121
122	PayPal	42%	40%	37%	39%	40%	36%	38%	37%	122
123	Mastercard	38%	36%	30%	35%	34%	27%	31%	30%	123
124	Tangerine	11%	9%	7%	8%	10%	8%	9%	9%	124
125	Air Miles	35%	32%	27%	30%	30%	26%	26%	27%	125

Column Abbreviations					
S/L	S: Short-Term Category (3 Months) L: Long-Term Category (18 Months)				
A	Agriculture Fairs	C	Winter/Christmas/ Lights Celebrations and Fairs	E	National Exhibitions
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