



WOMEN AND SPORT

Insights into the growing rise and importance
of female fans and female athletes

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*All monetary values are in US Dollars.

Conversion rates (January 2015): 1€ = US\$ 1.15

WOMEN AND SPORT TODAY

Women and Sport explores the rise in the importance of both female athletes and female fans.

Aside from the digital revolution, the rapid rise in the importance, influence and value of female fans has been one of the most distinctive shifts in the sports marketing landscape in the last 50 years. This has been driven by some major societal and cultural changes around the world, and the increasing participation of women in sport, in particular at school.

We now see the impact of a second generation of young women growing up with a much higher chance of developing an interest in sport, and female sporting celebrities providing role models who are closing the gap with non-sport celebrities and their male counterparts.

Fans are at the centre of the sports marketing equation and one of the primary reasons why sponsors invest in sport, and female fans are of particularly high value to some sponsors given their influence in purchase decisions.

Women and Sport will tap into the vast array of data points Repucom has amassed on women's media habits (TV and digital), the main sponsors associated with women in sport, the most marketable female athletes around the world and the future of women and sport. Utilising data derived from many hundreds of thousands of interviews around the world and Repucom's specialist databases, we look at the commercial and societal implications of a growing female fan population as well as sport formats, which women take part in at both mass participation and elite level.

Female sports competitions, female athletes and female fans present a major opportunity to the business of sports around the world in 2015 and beyond, and so will remain an important focus for Repucom's digital, media, market research and management consultancy practices.

Paul Smith
Founder and CEO, Repucom



WOMEN FANS

A large crowd of women fans is shown from a high angle, filling the frame. Many have their hands raised in the air, some holding up phones to record. They are wearing various sports jerseys and scarves. The overall atmosphere is one of excitement and support. The image is in black and white, with the title text in a bright green color.

From music to museums, theatre to travel, we are all fans of something. Being a sports fan might have been more associated with men in the past, but women are increasingly consuming sports both in terms of attending sporting events and watching sports on TV and other media. The number of women participating in sport is also on the up.

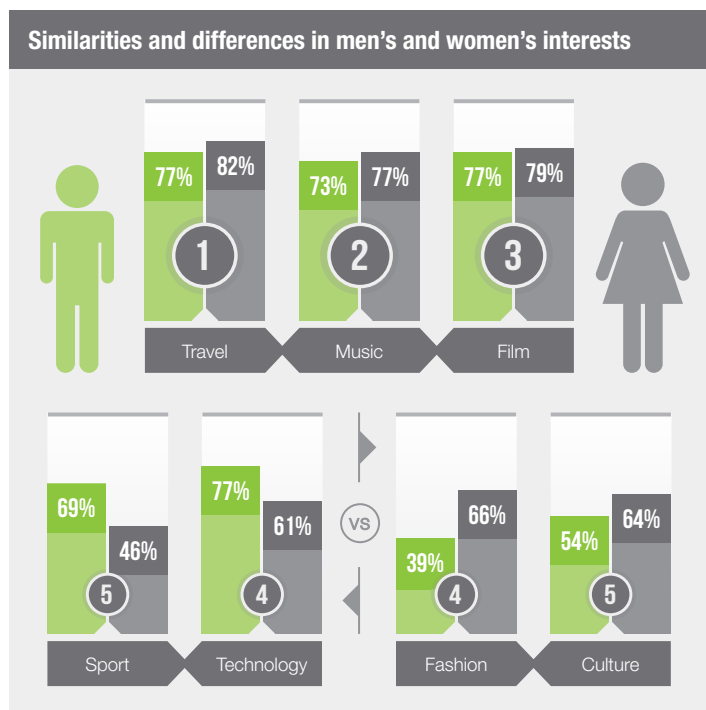
Understanding which sports women watch and how is paramount to sponsors, brands, broadcasters as well as national and international sports bodies in order to further increase attendance figures and participation levels around the world.

WOMEN'S AND MEN'S INTERESTS

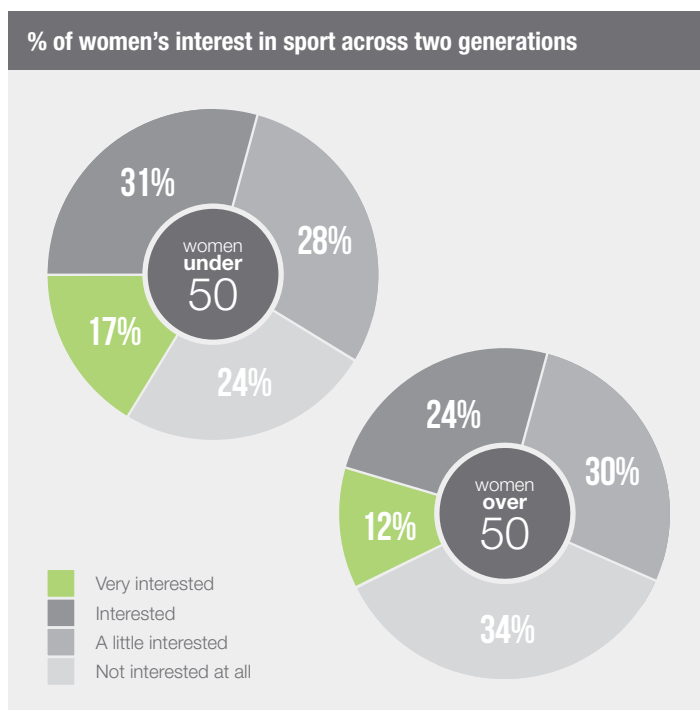
Music, movies and travel generally top the ranking of interests for both men and women around the world. Differences in interest between men and women usually emerge lower down the list with women tending to prefer arts, culture and social interests whilst men focus more on technology and sport.

But the gap between men's and women's interest in sport has narrowed hugely in the last 50 years. On average across 24 major countries representing the Americas, Europe and Asia, nearly half of all women now declare themselves

either interested or very interested in sport compared to 69 per cent of men. And some of the dynamic markets of Asia – UAE, India and Indonesia – lead the field with more than half of all women switched on to sport, particularly sport on TV. Across the rest of the world, Brazil, Russia, Italy, Japan and Turkey all show above average interest in sport amongst women as well. UAE, Brazil, India and Russia are the countries with the smallest gender gaps between male and female interest in sport.



Source: Repucom SportsDNA, May 2014, average of 24 major countries (Argentina, Australia, Brazil, Canada, China, Denmark, France, Germany, India, Indonesia, Italy, Japan, Malaysia, Mexico, Poland, Russia, Singapore, South Korea, Spain, Turkey, United Arab Emirates, UK, USA, Vietnam), respondents aged 16-65 at least a little interested in sport (80-95% of total age group population), n=24,000

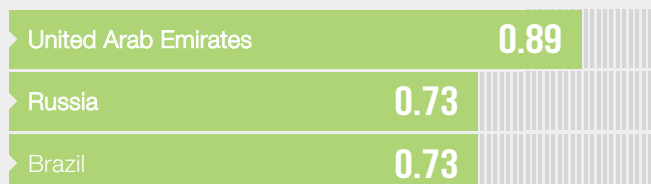


Source: Fan DNA Survey, August 2014, total for eight countries (USA, UK, Germany, Mexico, Malaysia, China, Japan, Australia), respondents aged 16-65 at least a little interested in sport (80-95% of total age group population) n=24,024

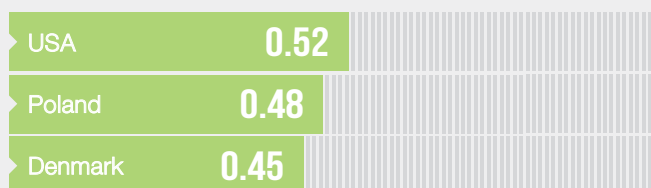
Index of men's and women's interest in watching sports on TV measured across six countries

ACROSS ALL MARKETS **69% OF MEN ARE INTERESTED IN WATCHING SPORTS ON TV COMPARED TO 43% OF WOMEN**

Countries with the **least** difference between men and women interested in watching sports on TV:



Countries with the **largest** difference between men and women interested in watching sports on TV:



Source: Repucom SportsDNA, May 2014, average of 24 major countries (Argentina, Australia, Brazil, Canada, China, Denmark, France, Germany, India, Indonesia, Italy, Japan, Malaysia, Mexico, Poland, Russia, Singapore, South Korea, Spain, Turkey, United Arab Emirates, UK, USA, Vietnam), respondents at least a little interested in sport (80-95% of total population), n=24,000

% of interest amongst men in six key markets

	TOTAL	Brazil	India	Russia	UK	USA	Germany
Sports events	54	56	35	48	62	61	50
Sports on TV	69	64	71	65	73	74	68
Concerts/festivals	52	51	45	48	52	64	54

% of interest amongst women in six key markets

	TOTAL	Brazil	India	Russia	UK	USA	Germany
Sports events	33	34	30	41	36	41	27
Sports on TV	43	47	52	48	39	39	38
Concerts/festivals	57	65	47	68	60	64	56

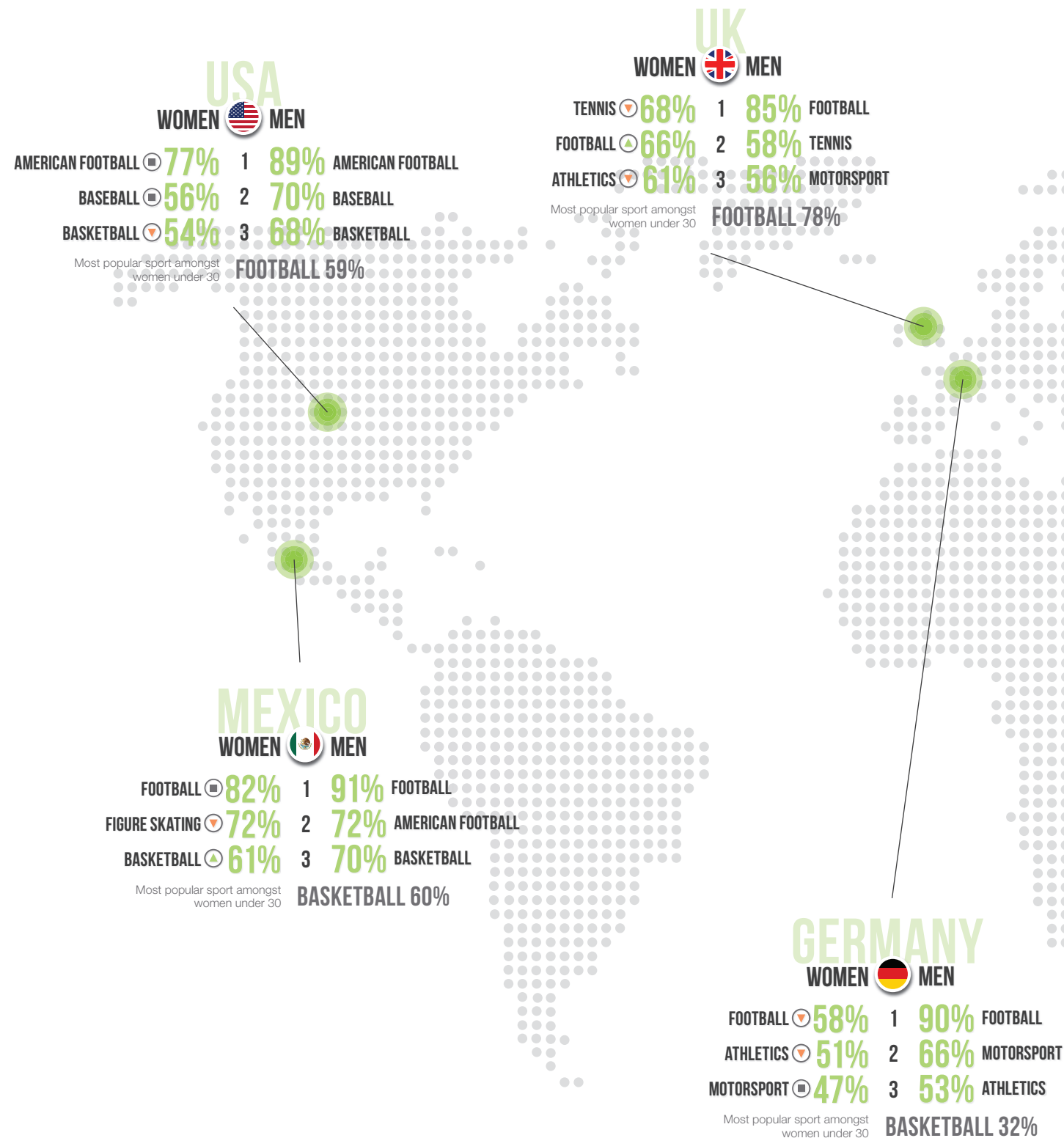
Source: Repucom SportsDNA, May 2014, average of 24 major countries (Argentina, Australia, Brazil, Canada, China, Denmark, France, Germany, India, Indonesia, Italy, Japan, Malaysia, Mexico, Poland, Russia, Singapore, South Korea, Spain, Turkey, United Arab Emirates, UK, USA, Vietnam), respondents at least a little interested in sport (80-95% of total population), n=24,000

WOMEN'S AND MEN'S INTEREST IN WATCHING SPORT ON TV

Whilst tennis and basketball frequently come out as the sports women are most interested in across eight key markets, women report football as the sport they are most likely to watch sometimes or regularly during their respective

seasons – and this is increasingly true with younger women across the world.

% of men and women who sometimes or regularly watch specific sports on TV during their respective on-seasons





The female audience for tennis and Olympic sports such as athletics and figure skating is often actually larger than their male audience. Of the mainstream “global” sports considered here motorsport is the sport with the biggest gender

gap with a female audience less than 70 per cent of the size of the male one on average across these countries.

CHINA

WOMEN  MEN

BADMINTON 	91%	1	88%	BASKETBALL
BASKETBALL 	80%	2	86%	BADMINTON
TENNIS 	78%	3	76%	TENNIS

Most popular sport amongst women under 30

BASKETBALL 80%

JAPAN

WOMEN  MEN

FIGURE SKATING 	77%	1	66%	BASEBALL
FOOTBALL 	46%	2	65%	FOOTBALL
BASEBALL 	45%	3	39%	FIGURE SKATING

Most popular sport amongst women under 30

FOOTBALL 58%

AUSTRALIA

WOMEN  MEN



TENNIS 	64%	1	68%	CRICKET
AUSTRALIAN FOOTBALL 	49%	2	58%	AUSTRALIAN FOOTBALL
CRICKET 	46%	3	57%	TENNIS

Most popular sport amongst women under 30

RUGBY LEAGUE 49%

MALAYSIA




WOMEN  MEN

BADMINTON 	95%	1	89%	BADMINTON
FOOTBALL 	64%	2	86%	FOOTBALL
ATHLETICS 	54%	3	62%	MOTORSPORT

Most popular sport amongst women under 30

BASKETBALL 45%

Demographic Pressure determining the sports women will follow in the future:

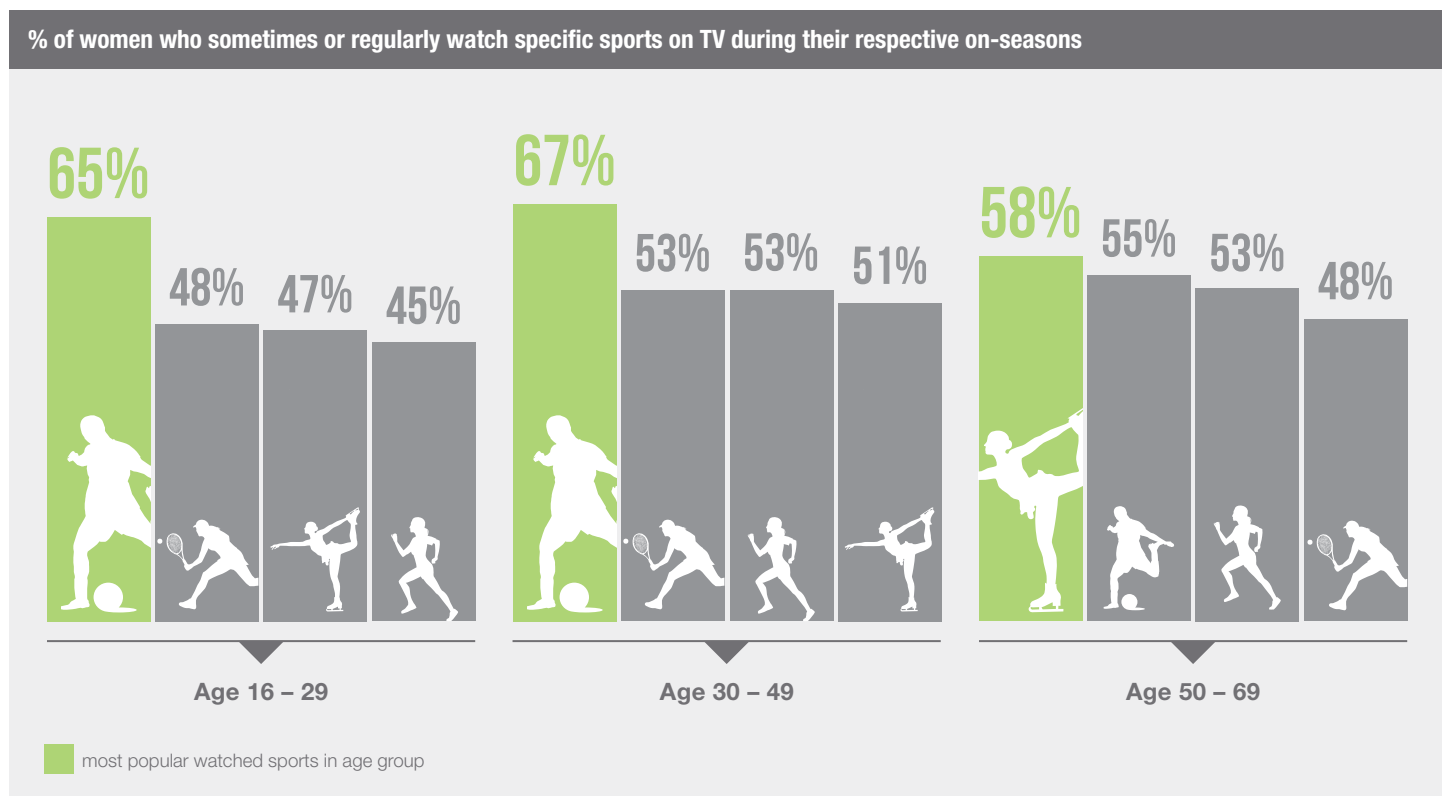
-  arrow is up if women under 30 are more interested in this sport than other women
-  square if women aged 30 to 50 are interested in this sport more than other women
-  arrow is down if women over 50 are more interested in this sport than other women

WOMEN'S SPORTS MEDIA CONSUMPTION

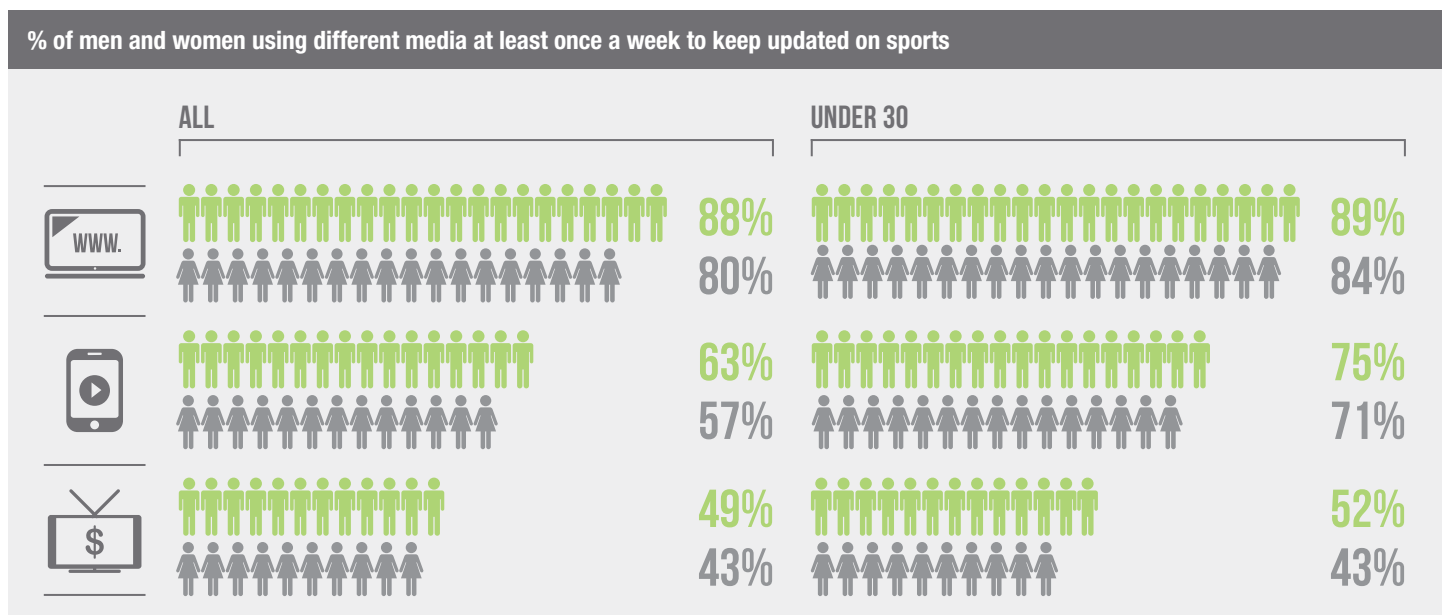
In addition to the diversity of different sports women are interested in across the world, we can see some important changes happening between younger and older women. The most significant of these changes is the rise of the percentage of women who watch football. It is noticeable that women aged 30 to 49 have the highest percentage of interest in sport. And two-thirds of them are at least a little interested in any sport. Subsequently, this age group will often be encouraging their children to participate in sport.

In general, women keep track of their sporting interests in much the same way as men with the internet and free-to-air TV being the most important media on a weekly basis. Across eight key markets women are more likely to be

incorporating radio vs mobile, and free-to-air rather than Pay TV – and younger women are more focussed on internet and mobile apps. When we compare media habits in the under-30 age group, however, we can see that internet and mobile behaviour is converging with fewer differences between men and women than older generations. The gap is not narrowing in Pay TV and thus reflects differences in the types of sports men and women are interested in and the way they can be accessed in different countries.



Source: Fan DNA Survey, August 2014, total for eight countries (USA, UK, Germany, Mexico, Malaysia, China, Japan, Australia), respondents aged 16-65 at least a little interested in sport (80-95% of total age group population) n=24,024



Source: Fan DNA Survey, August 2014, total for eight countries (USA, UK, Germany, Mexico, Malaysia, China, Japan, Australia), respondents aged 16-65 at least a little interested in sport (80-95% of total age group population) n=24,024

THE INFLUENCE OF SPORTS AT SCHOOL

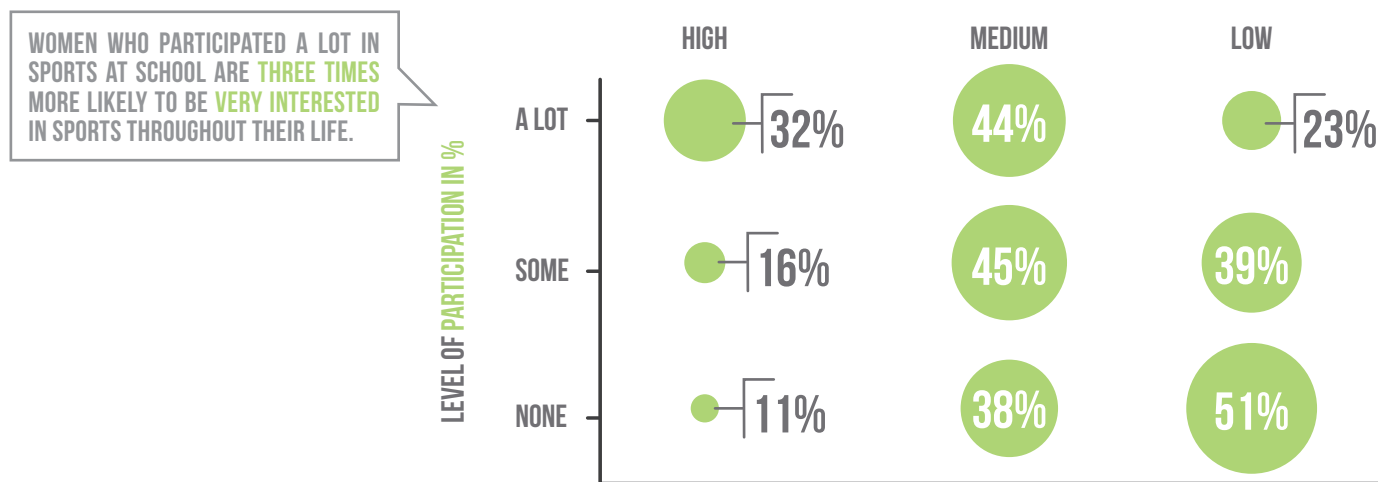
So what is driving these changes in the number of female fans and the type of sports they are interested in? Academic research over the last 50 years shows that the biggest influences on developing sports fans are parents, friends, schools and communities. But, it is the dramatic change in the level of participation of girls in sports at school from the 1970s onwards which has made this aspect the most important driver of change for women (Wann et al 2001).

The daughters of that generation of girls at school in the 70s and 80s are the new generation of female athletes and fans today. In the under-30 group of women across the diverse markets studied here, we see more than 50 per cent participated in sports at school. There are some marked differences between markets though

– with fewer than 15 per cent of young women in China who did not participate to over 84 per cent still not playing sports in Japan. So there is plenty of opportunity left to broaden women's participation further.

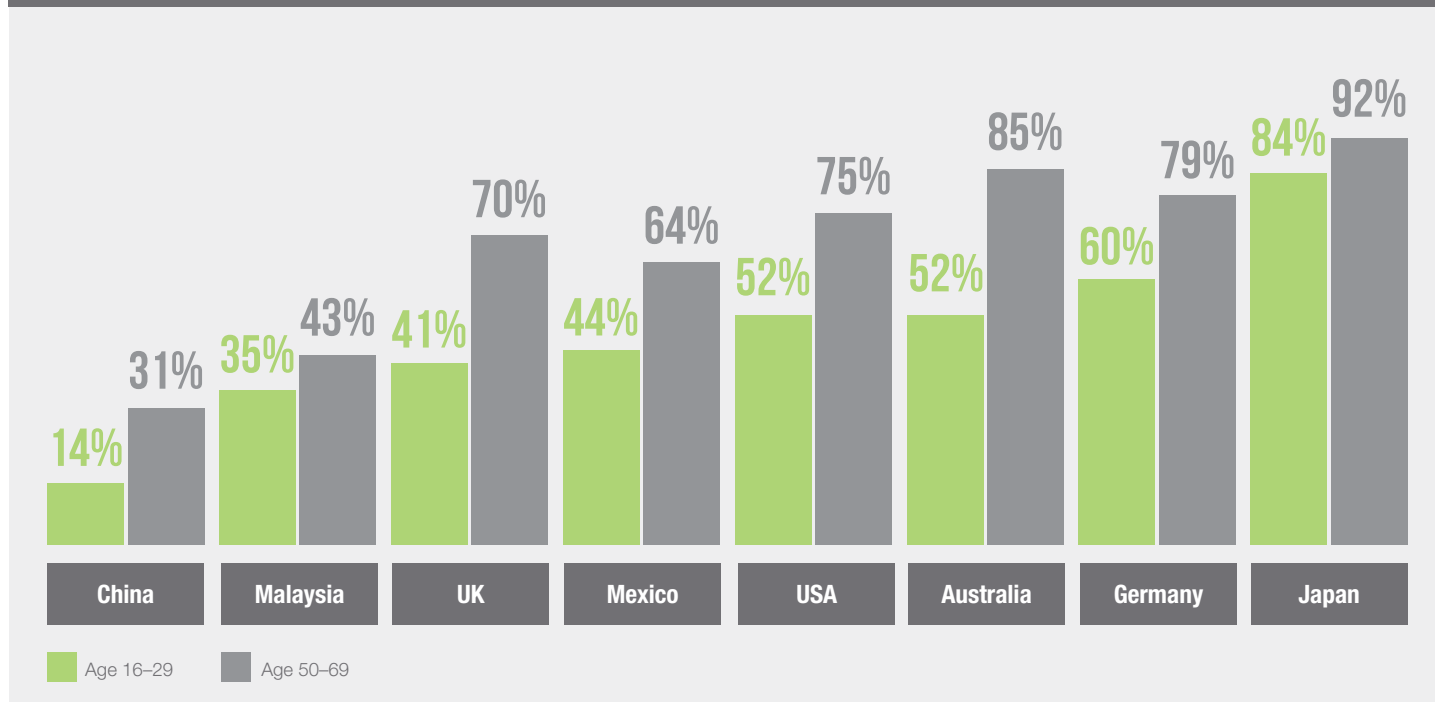
The link between taking part in sport at school for women and their subsequent level of interest as an adult is very clear. Across these diverse markets, a high level of sports participation at school translates to a 76 per cent chance of an enduring interest in sport compared to a less than a 50 per cent chance for those that did not play sports at school.

The influence of participation in sports at school on women's sustained interest in sports now



Source: Fan DNA Survey, August 2014, total for eight countries (USA, UK, Germany, Mexico, Malaysia, China, Japan, Australia)

% of women that did not participate in sports at school



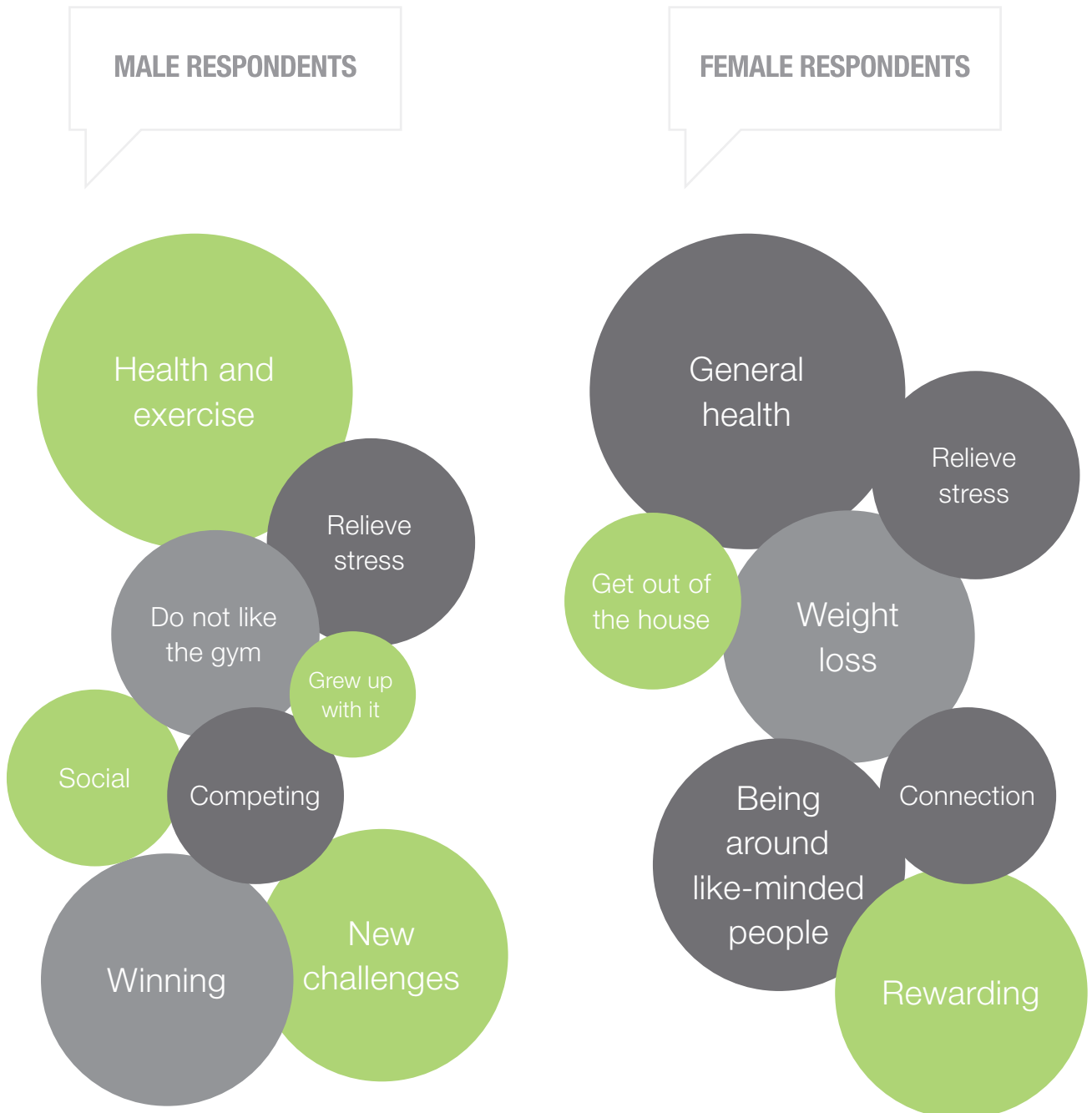
Source: Fan DNA Survey, August 2014, total for eight countries (USA, UK, Germany, Mexico, Malaysia, China, Japan, Australia)

TRIGGERS AND BARRIERS FOR PARTICIPATION IN SPORTS AMONGST MEN AND WOMEN

What about actual participation in sports for adult women? Running and cycling top the league of sports women enjoy most around the world and the explosion of organised mass participation events for running in particular is self-evident. But what triggers women's participation in sport and what holds it back? Repucom qualitative research shows some similarities between men and

women such as the desire for health and stress relief. Men tend to focus more on achievement listing, competing and winning as key drivers, while women are more likely to focus on connection and emotional benefits.

Drivers and triggers for participation

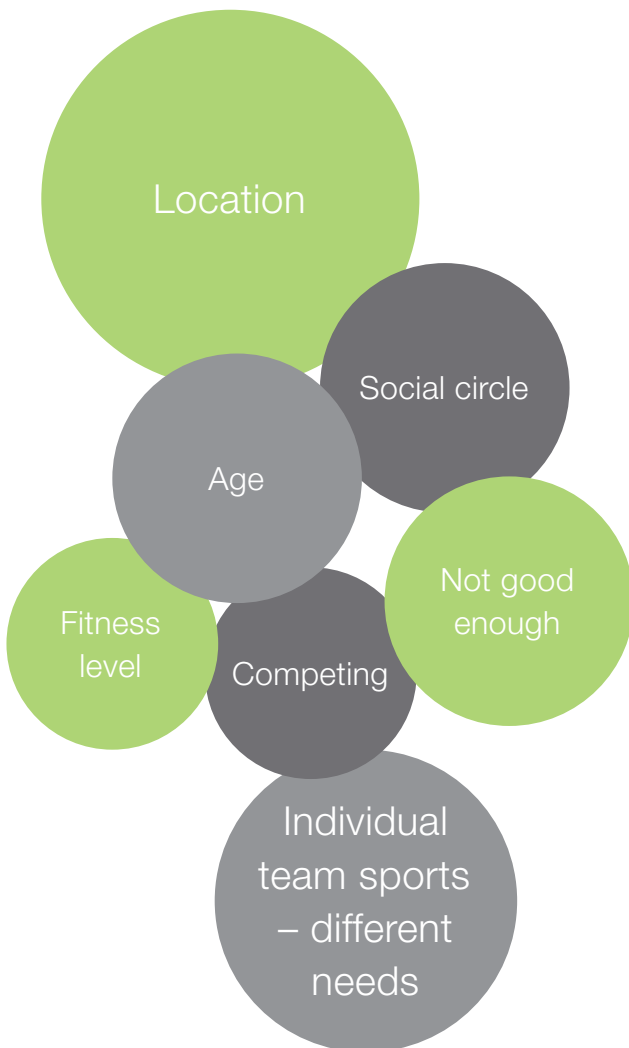


Thinking about barriers to participation, men talk about tangible obstacles such as fitness level, age, location – and whilst women list these too, they are

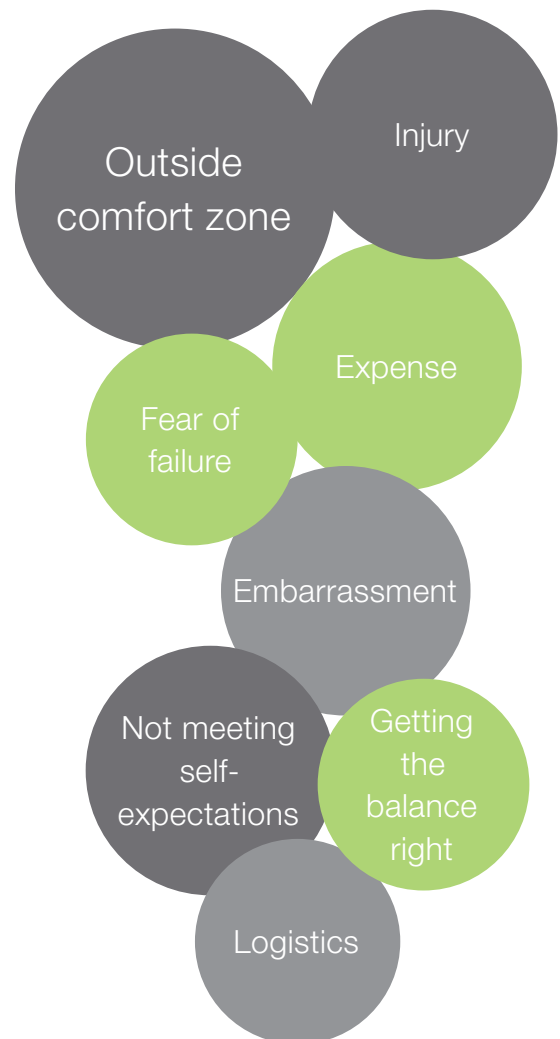
also more likely to cite emotional barriers such as fear of failure and embarrassment.

Barriers for participation

MALE RESPONDENTS



FEMALE RESPONDENTS





WOMEN, SPORT AND SPONSORSHIP

Brands have focussed on sponsorship opportunities with men's individual and team sports for many years. But over the last decade we have seen sponsors and broadcasters engaging more with female athletes at both grassroots and elite levels reflecting a broader realisation of the value of female role models and women's purchasing power around the world.

TURNING OF THE TIDE?

When assessing finances in sport as a whole, women are far from achieving equality in terms of endorsements and sponsorship with their male counterparts. For instance, in UK advertising campaigns that followed on from the London 2012 Olympic Games, the only two British female athletes who featured prominently were athletics star Jessica Ennis-Hill (Santander and PruHealth) and up-and-coming tennis player Heather Watson (BT Sport).

So why do brands continue to underleverage female athletes and teams when they certainly match their male counterparts in terms of success on-field and on-court? One obvious explanation is the media coverage. Sarah Juggins of the UK Sports Journalist Association asserts: "In the past two to three years, there has been a bit of a shift in perceptions about women's sports. The 2012 Olympics did a great job in putting sportswomen on the front and back pages, and in some cases they have remained there. However,

the back pages are still mainly football and racing." But, it is important to note that there is an increasing awareness of women's tennis, women's rugby and particularly women's football in the media, especially as the FIFA Women's World Cup is taking place this summer. Juggins adds: "There is a growing sense of responsibility along the media to give a form of parity to women's sport."

Outside the media, public policy and sports industry forums are concentrating more and more on the women and sport opportunity, and 2015 has seen the launch of Female Sports Group. The agency, an extensive user of Repucom data, are the first sports consultancy in the UK to focus exclusively on mixed gender and female sports.

CASE STUDY

UNDER ARMOUR'S "I WILL WHAT I WANT" CAMPAIGN

American sports clothing and accessories company Under Armour sought to increase female consumers by launching a campaign last year targeting women entitled "I Will What I Want." The global campaign includes a designated website and powerful and emotive adverts aimed at women. The first ad in the "I Will What I Want" series features American ballerina Misty Copeland, who rose to stardom despite not starting ballet until the late age of 13. The advert begins with Copeland warming-up while the voice of a young girl recites rejection letters she received over the years stating that she has the "wrong body for ballet." The commercial displays Copeland in graceful positions with pirouettes, elegant twists, turns and shows that Copeland eventually became a soloist for the fiercely competitive American Ballet Theatre.



Misty Copeland, American ballerina featured in Under Armour's "I Will What I Want" campaign.

Other famous American female athletes in the women-focussed "I Will What I Want" ad campaign include Olympic gold medallist in alpine skiing Lindsey Vonn, national football player Kelley O'Hara, pro surfer Brianna Cope and rising tennis player Sloane Stephens.

Brazilian supermodel Gisele Bündchen is the latest celebrity to feature in the "I Will What I Want" campaign where she is seen swapping the catwalk for an energetic kickboxing workout in the gym.

"The global campaign takes aim not just at female athletes but athletic females," states Under Armour CEO Kevin Plank.

According to Repucom's social media monitoring results, the "I Will What I Want" adverts received 52 per cent positive sentiment when on average an advert receives five per cent positive sentiment. Moreover, the ad campaign only received one per cent negative comments where the average advert receives five per cent. Comments on Twitter include statements such as: "I love the new ad campaign for under armour. I will what I want. Stay strong and live your dream! #IWILLWHATIWANT #IWILL #UnderArmour", "Great Emotional Marketing. Misty Copeland in Under Armour's I Will What I Want Campaign. Still amazed she started @13" and "I'm usually a Nike guy, but I gotta say, the new Under Armour slogan, I will what I want is pretty dang dope!"

Since the launch last year, of the 1,505 conversations started about the "I Will What I Want" campaign, 286 conversations per day were the peak for the ad featuring Misty Copeland compared to the peak of 156 per day for supermodel Gisele Bündchen. Significantly, although the "I Will What I Want" advertisements are targeted at a female audience, many men were impressed with the campaign with 41 per cent of men using social media to discuss the advert.

As we have already seen, football and tennis are incredibly important sports for female fans, so we have looked at the share of the TV audience of two major global events for these sports in 2014 – the FIFA World Cup in Brazil and the Wimbledon Championships. Perhaps unsurprising that these events were particularly popular amongst women in the event's home markets, but more significant is that the female share of audience for the World Cup is now above 25 per cent in markets like the US and Australia where football is not one of the largest national sports. And for Wimbledon, we see women actually have a

larger share of audience than men in Australia and the UK with other major markets not far behind.

Consequently, the huge audience events such as Wimbledon attract no doubt had an impact on the large monetary value of the groundbreaking WTA deal with PERFORM, which was announced at the end of last year.

CASE STUDY

WTA SIGNS RECORD US\$ 525 MILLION MEDIA DEAL WITH PERFORM

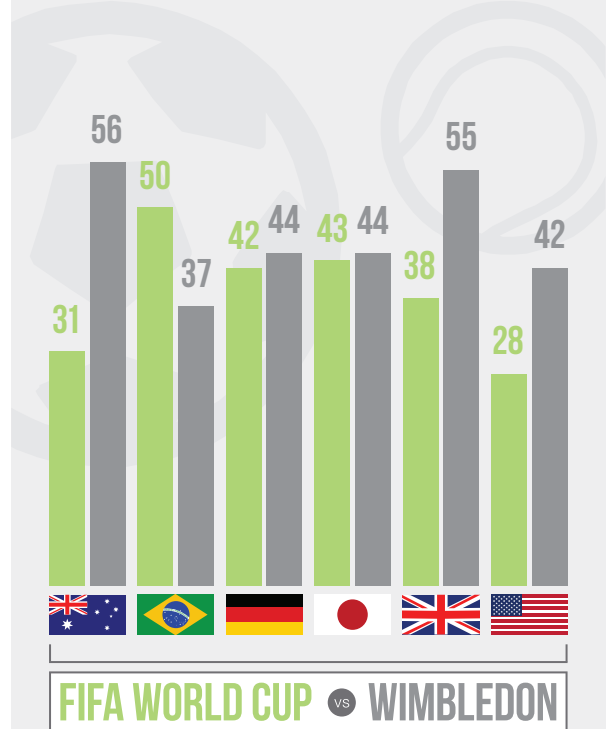
In December 2014, the Women's Tennis Association (WTA) signed a record media agreement with partner PERFORM valued at more than US\$ 525 million. The agreement will span over ten years and could prove to be a monumental achievement for women's sports.

PERFORM commercialises multimedia sports content across internet-enabled digital platforms, driving revenues through a mix of content distribution, advertising and sponsorship, the development and management of subscription platforms and technology and production. The agreement includes the introduction of WTA Media, which is a joint endeavour that will provide premium content to fans. It will also produce magazine shows and increase the presence on social media and in the digital world.

"This is a game-changing and historic moment for our fans and for women's sport," Stacey Allaster, the Chairman and CEO of the WTA, said. "Our new broadcast strategy to produce all 2,000 main draw singles matches in partnership with PERFORM will deliver exponential global exposure for our players, tournaments and partners."

Ultimately, the new deal will make it easier for fans to follow the WTA tour and have complete access to the athletes throughout the season.

% of women's share of total TV audience in 2014



EXPERT OPINION

WHICH COMPANIES DO YOU VIEW AS LEADING THE DEVELOPMENT OF WOMEN AND SPORT IN THE UK?

"A number of high profile, significant brands are now taking women's sport seriously and recognising the fantastic investment and profile building opportunity it represents. Notable examples include Newton Investment Management who not only sponsor the women's boat race, but have been instrumental in getting both the men and women competing on the Tideway, and both races broadcast live on the BBC in 2015.

ZEO has given a boost to the Netball Superleague as has Continental Tyres to the Football Association Women's Football Superleague, and these are just a handful of positive examples. There is a massive opportunity for pioneering, innovative brands and media partners to wake up to the benefits of investing in women's sport."

Ruth Holdaway

CEO of the Women's Sport and Fitness Foundation (WSFF)



The figures above relate to all rated channels available on MyEurodataTV. The monitoring periods used include the dates of the event, and upto one week thereafter. The figures also only relate to programmes whose title specify coverage of that tournament.
Photo of Ruth Holdaway printed with the kind permission of Women in Sport.

WOMEN'S ATTITUDE AND BEHAVIOUR IN RELATION TO SPONSORSHIP

During 2014 Repucom conducted foundational research relating to women's attitudes and behaviour in response to sponsorship and saw some common themes emerge around the world in both similarities and differences to the attitudes and behaviour of men.

Beyond these general statements, there are a number of important variations in women's attitudes to sponsorship in different countries. For example, in the UK, Mexico and Australia, women more than men look to sponsors to contribute expertise as well as money and appreciate when sponsors focus on local small teams and community programmes. In the US, Germany and China women

are more likely to focus only on the biggest events when thinking about sponsorship. Examples of statements in Germany and China show that women are more likely to be sceptical about sponsorship as "a necessary evil" (China) and "ruining the purity of sport" (Germany).

Finally in Japan women are more likely than men to see sport sponsors as "credible" especially when their products "fit" the sport being sponsored. And they are more likely to enjoy prize draws offered by sponsors as well.

Men and women tend to agree that...

"SPONSORSHIP IS JUST ANOTHER FORM OF ADVERTISING"

"IF IT WASN'T FOR SPONSORSHIP, MANY TEAMS WOULD NOT EXIST"

"SPORT PLAYS AN IMPORTANT ROLE IN OUR SOCIETY AND NEEDS TO BE SUPPORTED BY SPONSORSHIP"

Women are less likely than men to say...

"I HAVE A TENDENCY TO BUY PRODUCTS AND BRANDS I HAVE SEEN AS SPONSORS IN SPORTS"

"I ACTIVELY AVOID BRANDS THAT SPONSOR TEAMS I DON'T LIKE"

"SPONSORS INTERFERE WITH THE SPORT I LOVE"

Source: Fan DNA Survey, August 2014, total for eight countries (USA, UK, Germany, Mexico, Malaysia, China, Japan, Australia), respondents aged 16-65 at least a little interested in sport (80-95% of total age group population) n=24,024

CASE STUDY

P&G'S "THANK YOU MUM" CAMPAIGN GENERATED US\$ 500 MILLION IN SALES GLOBALLY

P&G's "Thank You Mum" campaign was brought to life and gained widespread attention in the lead-up to and during the London 2012 Olympic Games. The creative engaged the key buyer of P&G products, mothers, in an emotive way that worked across different countries, cultures and importantly their brands. The campaign came to life with the short advert that celebrates the role that mums play in raising Olympians and great children. There were also videos of the mothers of some of the 150 athletes sponsored by P&G brands.

The campaign was promoted through a host of media channels. A companion in-store worldwide retailer programme was enacted five months before London 2012 and involved four million retailers. It was tied to an effort to raise over US\$ 25 million to support youth sports programmes that would

aid both the Olympic Games and mums everywhere. The promotions involved some 34 P&G brands including Tide/Ariel, Pantene, Pampers and Gillette. In addition, there was a "Thank You Mum" app that allowed people to thank their own mums with personalised content in the form of a video.

Approximately 230 P&G mum videos were created of which 150 were developed by P&G and 80 were user-generated content. In total the videos were viewed 24.6 million times and are estimated to have generated US\$ 500 million in sales globally.

Earlier in the report we discussed how important the participation of women in sport at school has been in changing their level of interest as sports fans and the chances of them taking part in sport in their adult life. Our foundational research in 2014 shows that this change in participation levels has had a profound impact on how sponsorship changes women’s behaviour – with women who fully participated in sport at school three to six times more likely to have subsequently shown “fan behaviour” relating to the brands involved in sport sponsorship.

We also asked both men and women to estimate their annual spend in different aspects of being a sports spectator (buying tickets and merchandise) and a sports participant (clothing and equipment). While men still outspend women in general, it is noticeable that the gap is narrowest with women aged 30 to 49, who actually exceed men’s average spend level on clothing for sport across these countries. Money spent by them on the rest of their family’s sporting activities will be an important factor here.

The influence of participation in sports at school on women’s behaviour in response to sponsorship

% OF WOMEN WHO RECALL DOING THE FOLLOWING THINGS AT LEAST ONCE

WOMEN WHO FULLY PARTICIPATED IN SPORTS AT SCHOOL

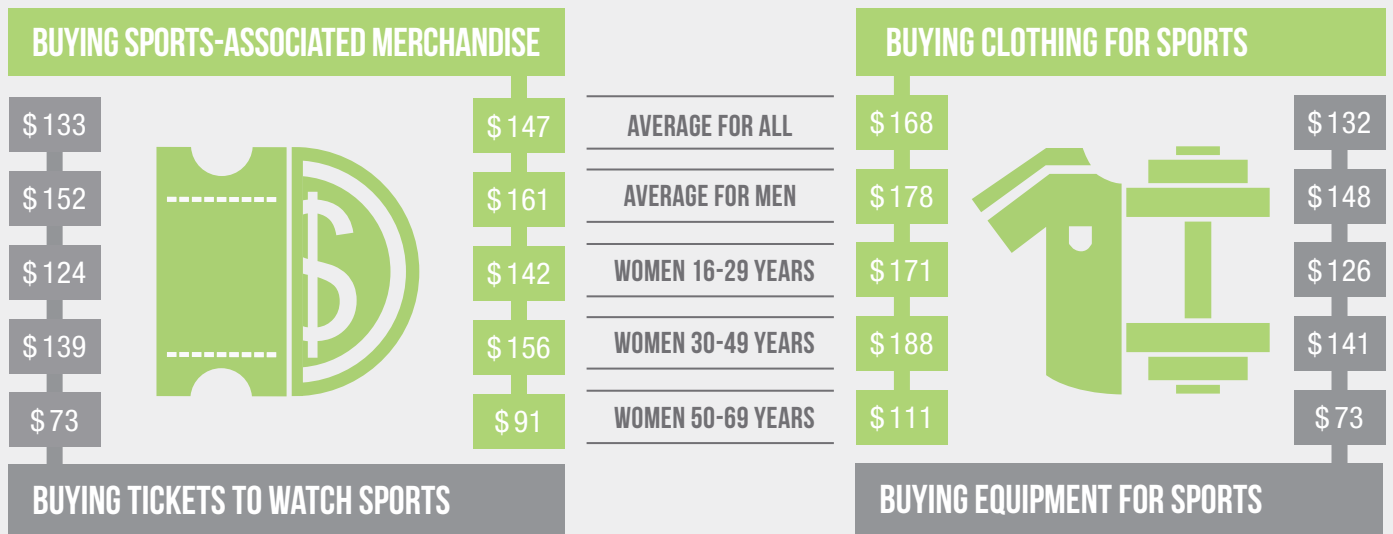


WOMEN WHO DID NOT PARTICIPATE IN SPORTS AT SCHOOL



Recommended a brand that sponsors a team, an event or an athlete that they follow to a friend	36%	6%
Bought products or services from a brand that sponsors a team, an event or an athlete that they follow	43%	14%
Started conversations about a brand that sponsors a team, an event or an athlete that they follow	36%	10%
Became more trusting of a brand that sponsors a team, an event or an athlete that they follow	34%	8%
Visited the website of a brand that sponsors a team, an event or an athlete that they follow	40%	12%
Recommended a brand that sponsors a team, an event or an athlete that they follow to a friend on social media	26%	4%
Researched the products or services of a brand that sponsors a team, an event or an athlete that they follow	30%	10%

Money spent in relation to sport



Average spend per annum on each category
 Source: Fan DNA Survey, August 2014, total for eight countries (USA, UK, Germany, Mexico, Malaysia, China, Japan, Australia), respondents aged 16-65 at least a little interested in sport (80-95% of total age group population) n=24,024

CASE STUDY



NIKE'S "MUSIC RUNS ELLIE" CAMPAIGN

One of the most innovative campaigns relating to women and sport in recent years is the first Nike "Music Runs Ellie" campaign from 2011. Nike wanted to motivate a younger audience to take-up running and selected singer Ellie Goulding to feature in the advert rather than a top female athlete, exemplifying the increasing influence of music as a magnet for sports brands.

The powerful advert created by AKQA sees the British singer on tour in Los Angeles, New York and London combined with training for a half marathon with Nike, which helps her keep track of her performance and allows her to share online updates with fans. The ad features the Jakwob remix of Ellie's hit *Under The Sheets* and is particularly effective as the singer is portrayed as a young woman with a passion for running, thus focussing on the singer and not the brand.

The Nike "Music Runs Ellie" advert was reportedly watched by over 65,000 people within the first two weeks of it being released and rapidly created a high buzz acquiring over 2,490 Likes on Facebook and approximately 11,904 conversations on social media platforms, mainly from the US and the UK. Hundreds of conversations were also sparked from people in Canada, Brazil, France, Mexico and Indonesia. Social media users in Ireland, Singapore, Spain, Australia, Germany, Venezuela, Argentina, New Zealand and China also generated online posts about the visionary advert. Interestingly, these

conversations were started by runners themselves as opposed to the singer's fans. British athletics icons Paula Radcliffe, Mo Farah as well as pop star Jessie J, who has over 6.85 million Twitter followers, praised the Nike advert via their respective social media platforms.

According to Repucom's social media monitoring results, the ad received 38 per cent positive sentiment greatly surpassing the average of five per cent and only four per cent negative comments where the average advert receives five per cent. Comments on video sharing website Vimeo include statements such as: "energetic ad", "Well done Nike" and "awesome ad and great beats!"

In comparison to other digital campaigns, the "Music Runs Ellie" Nike collaboration resulted in vast organic discussions and user-generated content. This highlights the winning formula of a great brand, popular singer and social media and puts passion for running centre-stage, which women can relate to and be inspired by.



MOST MARKETABLE

“It seems logical that the status and prestige given to sport heroes make them ideal role models for those who admire them. We might assume that they are in a position to have considerable influence on their followers.”

HOW TO MEASURE CELEBRITY

Celebrity David Brown Index (DBI) is a tool which sports marketers use to understand the public's perceptions of over 7,000 personalities across 15 markets around the world (currently Argentina, Australia, Brazil, China, France, Germany, India, Italy, Japan, Mexico, Russia, Spain, Turkey, the UK and the USA) representing the views of over 1.5 billion people.

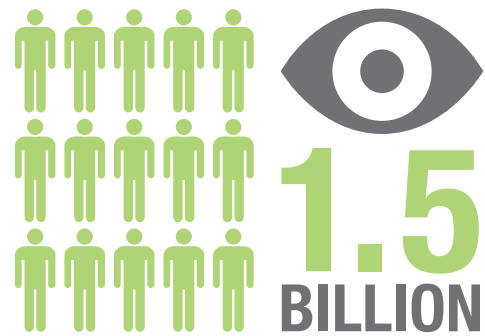
It provides insights into specific demographics including age and income groups to give a clear picture of how audiences consider a personality or athlete. Additionally, it enables users to compare specific markets and show the changes in the perceptions over time-critical considerations for brands unlocking the power of celebrity endorsements.

These perceptions are measured against eight key attributes which, when combined together, give an overview of that person's marketability. The individual attributes also provide key strengths and weaknesses of how the personality is seen in different countries around the world.

All attribute scores are displayed on a scale from 0 to 100 points with 100 points being the highest mark to attain. The calculation of the scores includes all percentage values of the questionnaire's six-point scale and therefore provides results within the group of all respondents.



CELEBRITY DBI TAKES VIEWS OF PEOPLE IN 15 GLOBAL MARKETS



CELEBRITY DBI REPRESENTS THE VIEWS OF 1.5 BILLION PEOPLE

Source: Repucom's Celebrity DBI

WHAT DOES CELEBRITY DBI MEASURE?

AWARENESS

Indicates the percentage of people who are aware of the celebrity either by name or face. Awareness is the baseline. If the target does not know a celebrity, the other attributes are meaningless.

APPEAL

Measures likeability of the celebrity.

BREAKTHROUGH

Indicates the degree to which people take notice of the celebrity when they appear on TV, film or print.

TRENDSETTER

Reflects opinion on the celebrity's position with regards to trends in society.

INFLUENCE

Measures the degree to which people believe the celebrity is an influence in today's world. Does the celebrity impact brand consideration and purchase intent?

TRUST

Indicates the level of trust that the people place in the celebrity's words and image.

ENDORSEMENT

Reflects the degree to which people identify the celebrity as being an effective product spokesperson.

ASPIRATION

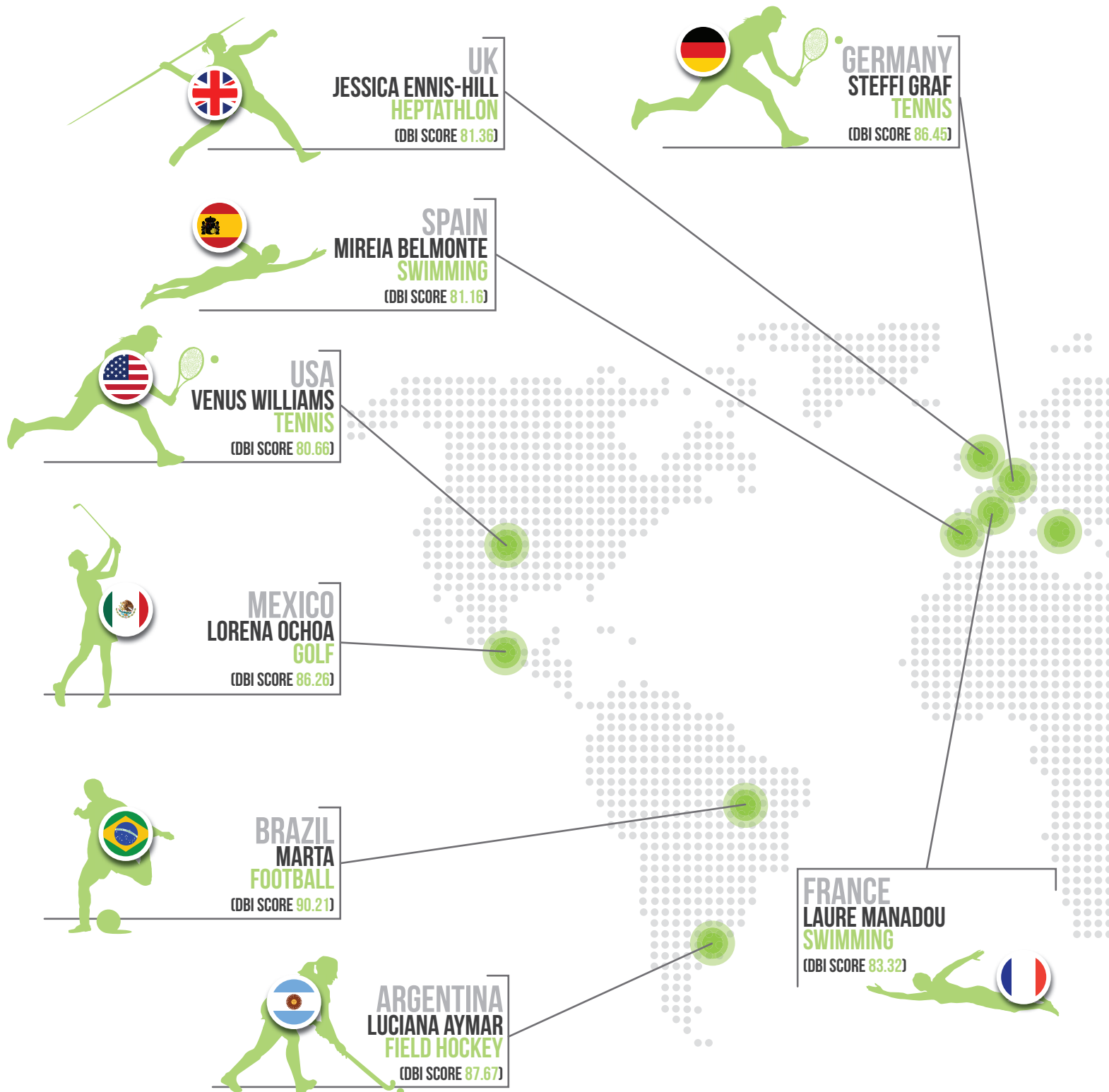
Measures the degree to which people feel the celebrity has a life to which they would aspire.

MOST MARKETABLE FEMALE ATHLETES

With the exception of tennis icons Maria Sharapova being the most marketable female athlete in Turkey and Serena Williams topping the poll in Australia, all

other sportswomen featured here actually hail from the countries where they are the number one most marketable

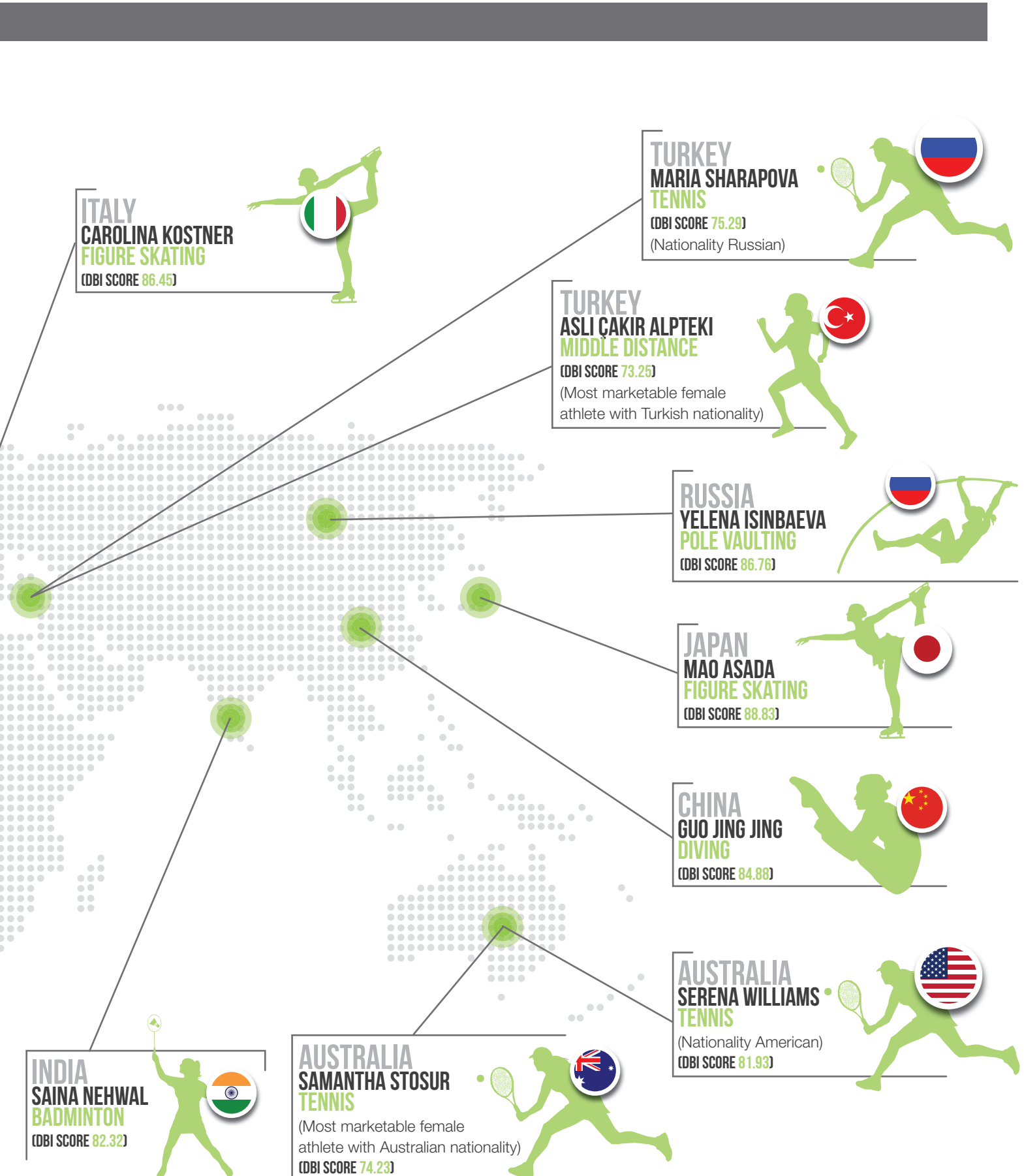
Most marketable female athletes in 15 selected markets



Source: Repucom's Celebrity DBI

female athlete, of which four are retired from their respective sport. As the world map illustrates, tennis, figure skating and swimming are the top sports

in these countries where women reach elite level and are consequently the most marketable.

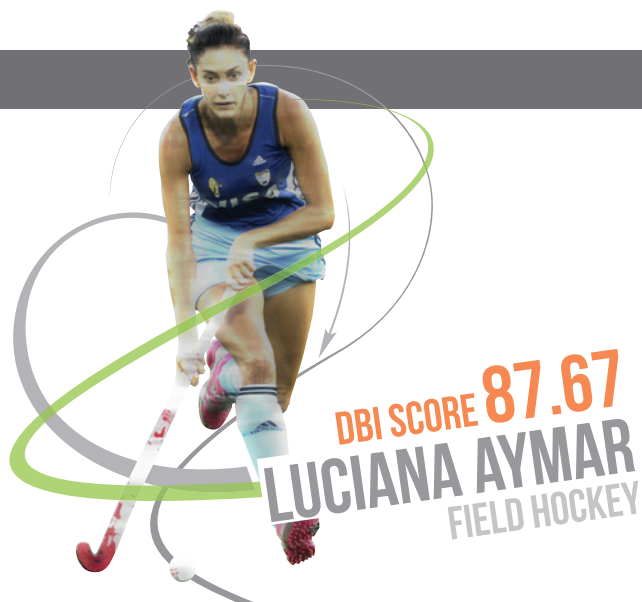


THE AMERICAS

Date of Birth: 10 August 1977
Birthplace: Rosario, Santa Fe, Argentina



Luciana Aymar is often cited as the best female hockey player in history and the only player to receive the prestigious International Hockey Federation Player of the Year Award a record eight times. At the London 2012 Olympics, she led Argentina to silver and became the second Argentine to achieve four Olympic medals. With her remarkable dribbling skills and pace, Aymar is often likened to Argentinian football icon Diego Maradona and is known by the monikers "El Diego," "La Maradona del hockey" and "La Maga" (The Magician). Aymar retired in December 2014 in order to spend more time with friends and relatives and start a family of her own.



Date of Birth: 19 February 1986
Birthplace: Dois Riachos, Alagoas, Brazil



Marta Vieira da Silva, commonly known by her first name, is one of the most talented female football players and tops the all-time Women's World Cup goal scorer list alongside German legend Birgit Prinz. At the 2007 Women's World Cup, Marta won both the Golden Ball and the Golden Boot awards. Marta was named FIFA World Player of the Year five consecutive times between 2006 and 2010. The 28-year old currently plays for FC Rosengård in Sweden. With 97.4 per cent of people knowing Marta in Brazil, it is no surprise that "Pele with skirts" features in Puma's "Forever Faster" campaign with Usain Bolt and Mario Balotelli and is the most marketable female athlete in her home country.

DBI SCORE 90.21
MARTA
FOOTBALL



Date of Birth: 15 November 1981
Birthplace: Guadalajara, Mexico



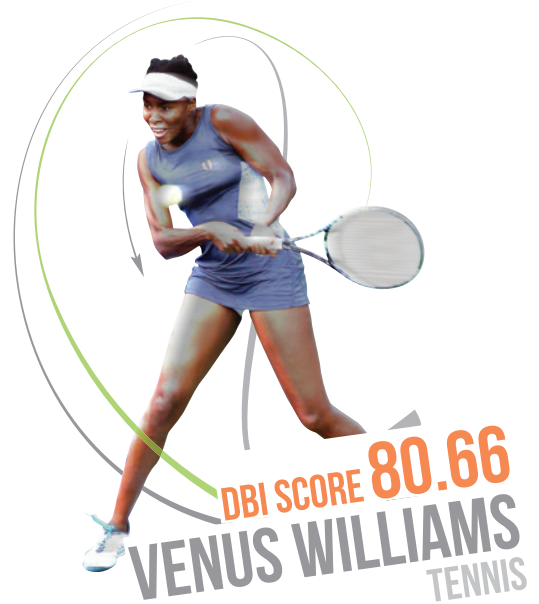
Ochoa is considered the best Mexican golfer in the history of the sport and was the top-ranked female golfer in the world for over three years, from April 2007 until her retirement in May 2010 aged 28. The Mexican golf prodigy won the 2006 Associated Press Female Athlete of the Year award. In 2007, it was widely reported that Ochoa became the first woman ever to earn more than US\$ four million in a single season, surpassing Annika Sörenstam's previous record of US\$ 2,863,904. With sponsorship deals including Banamex, Lacoste, Rolex, PING, Grand Coral and E pura, prestigious and recognised brands have been part of Ochoa's illustrious career.



Date of Birth: 17 June 1980
 Birthplace: Lynwood, California, USA



Venus Williams is the most marketable female athlete in the US. She became the first African-American women's world tennis number one in February 2002 and took the women's game to new heights with more power and athleticism. Although with 43 singles titles, 19 doubles titles and four Olympic gold medals, Venus is less successful than her younger sister, she is more popular than Serena in the US and recognised by nearly 90 per cent of all Americans. Venus wears her own brand "Eleven by Venus" at tournaments and her racquet sponsor is Wilson. She has nearly two million fans on Facebook and is approaching 1.2 million followers on Twitter.



EUROPE



DBI SCORE 83.32
LAURE MANAUDOU
 SWIMMING

Date of Birth: 9 October 1986
 Birthplace: Rhône, France



French Olympic, World and European Champion swimming sensation Laure Manaudou enjoyed a successful career winning three medals at the Athens 2004 Olympic Games including a gold medal in the women's 400-metre freestyle, France's first gold medal in the history of women's swimming. The 28-year old went from the pool to motherhood in 2010 and welcomed daughter Manon. With a colossal 96.6 per cent of awareness in France, Laure is a French icon and has sponsorship deals with Rebok and local French sponsors mondial piscine, envido and Topsec.

Date of Birth: 14 June 1969
 Birthplace: Mannheim, Germany



Despite retiring over 16 years ago, Steffi Graf is the most marketable female athlete in Germany. With 22 Grand Slam singles titles, she holds the all-time record for most Major wins by a tennis player, male or female, since 1968. In 1988 Graf became the first and only tennis player to achieve the Golden Slam by winning all four Grand Slam singles titles. An Olympic gold medal for Germany completed a tremendous year. She retired in 1999 and married fellow tennis legend Andre Agassi two years later. They reside in Las Vegas with their two children. With an enormous 98.41 per cent of people knowing Graf in Germany, the 45-year old attracts endorsement deals with brands including adidas, Longines, Mrs Sporty, Nintendo and Teekanne.

DBI SCORE 86.45
STEFFI GRAF
 TENNIS





Date of Birth: 8 February 1987

Birthplace: Bolzano, Italy

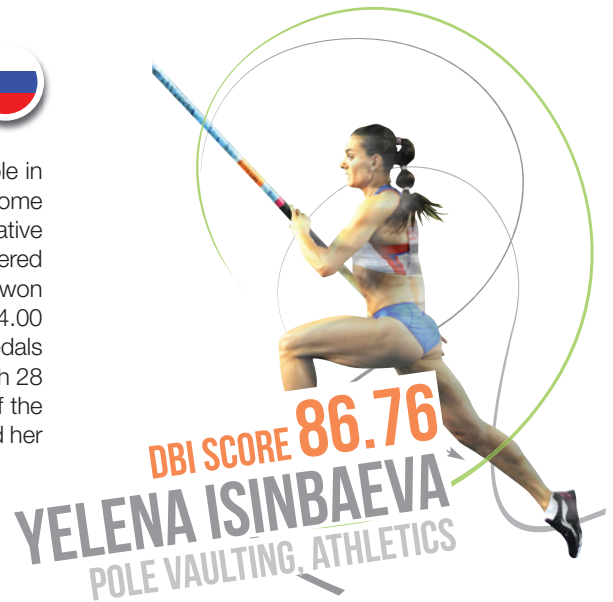


Italian figure skater Carolina Kostner followed in the footsteps of her mother Patrizia, a nationally ranked figure skater in the 1970s. The multi-lingual ice princess won a bronze medal at the 2014 Sochi Winter Olympic Games. Major titles include being the 2012 World Champion, a five-time European Champion, seven-time Italian Champion and 2011 Grand Prix Final Champion. With 96 per cent of awareness in Italy, Kostner is a household name and attracts sponsorship deals from OVS Active Sport Training, Pompadour, Acqua Norda, Grissinbon and Südtirol – Alto Adige.

Date of Birth: 3 June 1982
Birthplace: Volgograd, Russia



Yelena Isinbaeva is recognised by 95.67 per cent of people in Russia and is the most marketable female athlete in her home country. Isinbaeva originally trained as a gymnast in her native Russia until she was 15 and stopped as she was considered too tall. Only six months after taking up pole vaulting, she won the 1998 World Youth Games in Moscow with a height of 4.00 metres. Ten years later she had two Olympic gold medals under her belt and was a three-time World Champion. With 28 world records, Isinbaeva has established herself as one of the most successful athletes of her generation. She welcomed her first daughter in June 2014.



Date of Birth: 10 November 1990
Birthplace: Badalona, Spain



Mireia Belmonte is the first swimmer in Spain's history to win two Olympic medals after winning silver at London 2012 in the 200-metre butterfly and the 800-metre freestyle. The 24-year old recently broke the world record for the 200-metre butterfly and 200-metre individual medley at the 2014 FINA World Cup series in Doha, Qatar. Belmonte has acquired sponsorship deals with brands including Nike, Speedo, Renault, UCA, EDOX, OHL and PageGroup. She currently has 90,000 fans on Facebook and is even more popular on Twitter with 184,000 followers.





DBI SCORE 75.29
MARIA SHARAPOVA
 TENNIS

Date of Birth: 19 April 1987
 Birthplace: Nyagan, Russia



Sharapova rose to the top of women's tennis in 2004 aged 17, when she won Wimbledon. The world number one ranking followed in 2005. With 76.2 per cent of people in Turkey knowing Sharapova, she is more popular than local women's athletics stars Aslı Çakır Alptekin and Elvan Abeylegesse as well as volleyball player Neslihan Danel. Endorsement deals include evian, Nike, Tag Heuer and Porsche. Sharapova is an avid businesswoman and launched "Sugarpova" sweets with flagship stores around the world. The 27-year old reportedly earns in the region of US\$ 15 to 20 million in endorsement deals per season.

Date of Birth: 28 January 1986
 Birthplace: Sheffield, UK



Jessica Ennis-Hill is the most marketable female athlete in the UK. Undoubtedly winning a gold medal at London 2012 has catapulted her popularity and awareness in her home country. Ennis-Hill is the current British national record holder for the heptathlon and the indoor pentathlon. The British athletics ace's impressive records and down-to-earth persona have landed her sponsorship deals with adidas, BP, Omega, Powerade, PruHealth, PruProtect, Bank Santander UK and Sky Sports. The value of her endorsement deals combined is one to two million US\$ per season. With nearly 1.5 million fans on Facebook and 1.4 million followers on Twitter, Ennis-Hill's popularity is set to rise as she combines her track and field career with motherhood.



DBI SCORE 81.36
JESSICA ENNIS-HILL
 HEPTATHLON, ATHLETICS

ASIA PACIFIC



DBI SCORE 81.93
SERENA WILLIAMS
 TENNIS

Date of Birth: 26 September 1981
 Birthplace: Saginaw, Michigan, USA



Although older sister Venus is the most marketable female athlete in the US, Serena is the most marketable in Australia with 94.65 per cent of people recognising the four-time Olympic gold medallist and 18-time Grand Slam champion. Serena became world number one for the first time in July 2002. At 33, she is the oldest world number one in the history of the WTA. With over US\$ 63.5 million in prize money, Serena is the highest earning women's athlete of all-time in all sports. The tennis star attracts sponsors including Nike, Wilson, Gatorade and OPI Products. Her deal with Nike spanning 2004 to 2014 is reportedly worth US\$ 55 million and Serena estimatedly earns US\$ 10 to 15 million in endorsement deals per season. She is active on social media with over 4.52 million Twitter followers and 2.7 million Facebook fans.



Date of Birth: 15 October 1981
Birthplace: Baoding, Hebei, China



Although Guo retired in 2011, with 96 per cent of awareness in China she remains the most marketable female athlete in her home country. Known as “The Princess of Diving”, with six Olympic medals Guo is tied with her partner Wu Minxia for winning the most Olympic medals of any female diver. After the 2004 Summer Olympics, Guo became a Chinese national sport megastar earning a contract with McDonald’s as well as numerous endorsement deals, which she was made to give up by the national team for excessive commercial activities. Guo married Kenneth Fok Kai-kong, the grandson of the late Hong Kong business tycoon Henry Fok in November 2012.

Date of Birth: 25 September 1990
Birthplace: Nagoya, Japan



Mao Asada greatly increased the popularity of figure skating in Japan and is one of the most recognisable figures in her home country with 99 per cent of awareness. At the 2010 Vancouver Winter Olympics, Asada became the only female figure skater to land three triple axels in one competition. She is a three-time World Champion, a three-time Four Continents Champion and a four-time Grand Prix Final Champion. During the 2014 Winter Olympics, Asada became the most mentioned athlete of the Olympics on Twitter ahead of Yuna Kim, T. J. Oshie and Shaun White. She has recently taken time off to pursue studies and a broadcasting career.



Date of Birth: 17 March 1990
Birthplace: Hisar, Haryana, India



Badminton starlet Saina Nehwal is the most marketable athlete in her home country India attaining 83.43 per cent of awareness, which is remarkable considering the population of over one billion people. Nehwal won a bronze medal at London 2012, becoming the first Indian to win a medal in badminton at the Olympics. She is the reigning Indian Champion and was ranked second by the Badminton World Federation in December 2010. Nehwal won the 2014 China Open Super Series Premier. She is active on Facebook with over 4.8 million fans.



MOST MARKETABLE FEMALE ATHLETES VS MALE ATHLETES

Whereas the 15 most marketable female athletes participate in ten different sports, the most marketable male athletes in the 15 markets tested by Celebrity DBI collectively compete or competed in only five sports: baseball, basketball, cricket, football and tennis.

Brazil and Australia are the only countries assessed where the most marketable male and female hail from the same sport: football superstars Pelé and Marta in Brazil and tennis icons Serena Williams and Roger Federer in Australia. The most marketable female athlete in Australia after Williams is Australian tennis player Samantha Stosur, whose local DBI score is 74.23. The most marketable male athlete in Australia after Federer is renowned Australian swimmer Ian Thorpe, whose local DBI score is 83.03.

The most marketable female athlete in Turkey after Maria Sharapova is Turkish middle distance runner Asli Çakır Alptekin, who has a local DBI score of 73.25. The second most marketable male athlete in Turkey is Turkish basketball star Hidayet Türkoglu, whose local DBI score is 89.32.

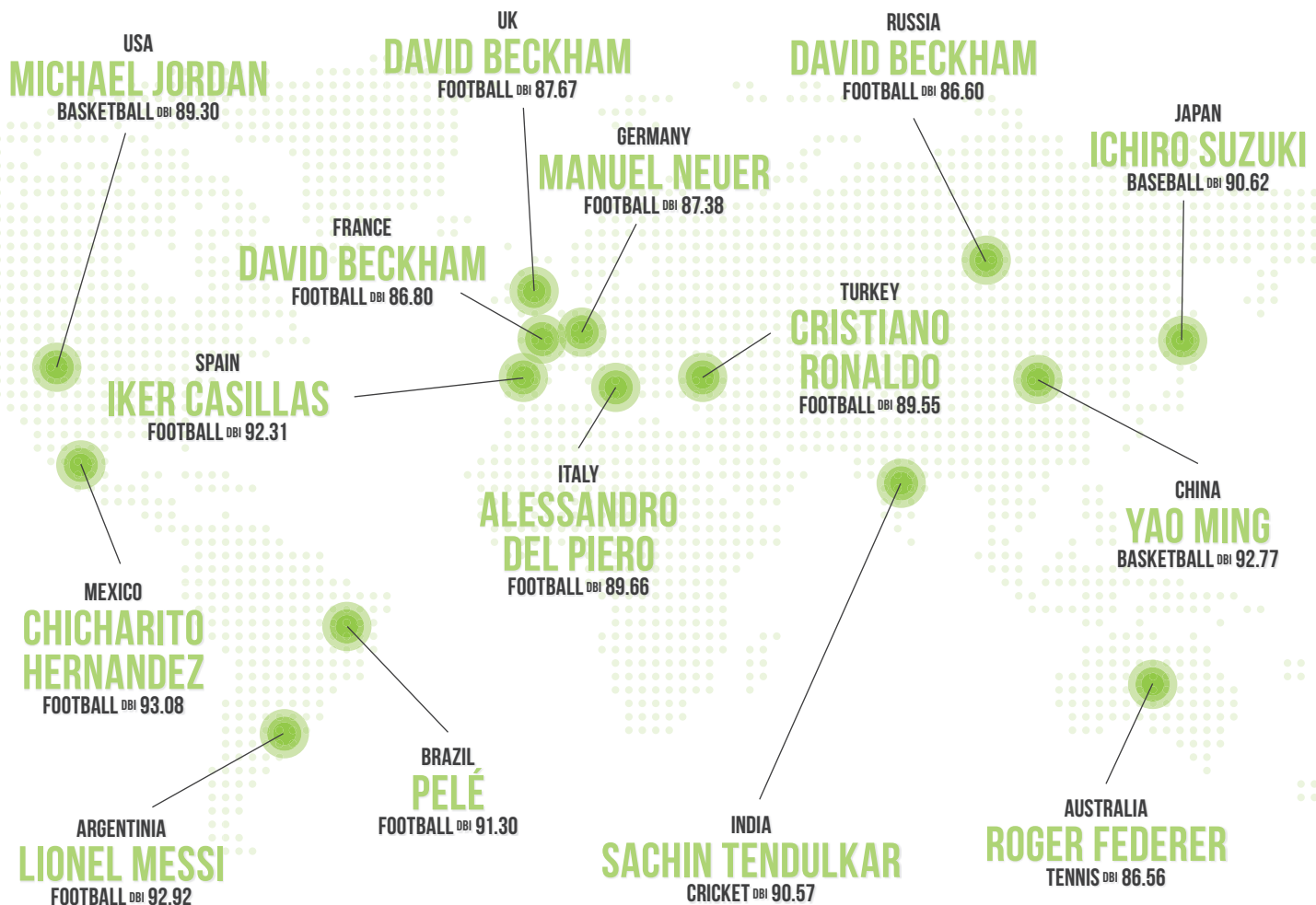
In Turkey, the most marketable male athlete Cristiano Ronaldo attains higher scores in all DBI categories than the most marketable female athlete, Maria Sharapova. This is also the case in the US as retired basketball legend Michael Jordan dominates all categories compared to Venus Williams as well

as Argentina where Lionel Messi scores higher in all eight DBI attributes in comparison to fellow compatriot and most marketable female athlete Luciana Aymar. In addition, Indian cricket hero Sachin Tendulkar acquires higher results in all categories than Saina Nehwal. In Australia, Roger Federer also beats fellow tennis player Serena Williams in all categories. This is also the case in China where Yao Ming is the number one most marketable athlete and has higher scores across all categories than Guo Jing Jing.

In the UK, athletics star Jessica Ennis-Hill scores higher in appeal and breakthrough than David Beckham. Moreover, in France, Laure Manadou also attains higher scores in appeal than Beckham and Russian pole vaulting queen, Isinbaeva acquires better results in appeal and aspiration than Beckham, who is the most marketable male athlete in Russia, France and the UK.

Japan's number one female athlete and celebrity Mao Asada achieves a greater score in appeal than compatriot and baseball star Ichiro Suzuki, whose results are higher in all other attributes. Thus, it can be ascertained that in the UK, France, Russia and Japan female athletes are highly regarded compared to countries such as the US, Turkey, Mexico, Argentina and Spain.

Most marketable male athletes in 15 selected markets



MOST MARKETABLE FEMALE ATHLETES VS FEMALE CELEBRITIES

When looking at the Celebrity DBI scores of all top women stars, only actresses and singers appear in the top ten. In fact, it is only number 25 when the first female athlete, Maria Sharapova, appears in the ranking. Female tennis players are the dominant celebs in comparison to other female sport stars as Serena and Venus Williams come in at 28 and 37 respectively – clearly tennis is a global sport with high media presence.

Angelina Jolie is the most known female celebrity amongst all 7,000 on Repucom's Celebrity DBI database with a global DBI score of 88.13. In some countries such as India, Brazil, Russia, Mexico and Turkey the actress scores much higher than the countries' most marketable female athlete. Yet in the UK, with the exception of the awareness factor, Jessica Ennis-Hill scores higher in every single other category compared to Hollywood icon Angelina Jolie including key attributes like: appeal, aspiration, endorsement, influence and trust.

In Germany, Steffi Graf is the second most popular female celebrity behind American actress Sandra Bullock, who is of part German heritage. In Russia,

Yelena Isinbaeva is the fourth highest ranked celebrity after American stars Angelina Jolie, Julia Roberts and Jennifer Lopez. Argentina also highly regard local female athletes as Luciana Aymar is number 12 amongst celebrities overall. Dynamic diver Guo Jing Jing is ranked tenth in China amongst all celebrities including Angelina Jolie, Anne Hathaway and Madonna. In the US, the highest ranked female celebrity who is an athlete is Venus Williams at 40, thus as opposed to the UK, Americans favour actresses and singers as aspirational female figures rather than athletes.

Conversely, the number one female celebrity overall in Japan is figure skater Mao Asada, who tops the poll ahead of American whimsical singer Lady Gaga and actresses Angelina Jolie and Cameron Diaz.

Most marketable female celebrities worldwide across all categories



Source: Repucom's Celebrity DBI

MOST MARKETABLE MALE ATHLETES VS MALE CELEBRITIES

Compared to female athletes where none appear in the top ten amongst all female celebrities, two male sports icons, David Beckham and Michael Jordan, are in the top ten of most marketable male celebrities globally with the number three and eight ranking. Football and basketball are unsurprisingly the most popular sports featuring male celebrities. With the exception of Australia, India and Japan, all the male athletes from the other 12 markets featured in Celebrity DBI are either football or basketball players.

British former football star David Beckham is the most marketable male athlete dominating three markets: his native UK, Russia and France. Although Yao Ming is the male athlete with the highest Celebrity DBI ranking overall with a score of 92.77 in China, Indian cricket hero Sachin Tendulkar has the highest scores in India in all DBI categories compared to the other male athletes with the exception of endorsement.

In the US, Venus Williams is the first female athlete at number 40 amongst the list of all female celebrities. However, Michael Jordan is number three ahead

of American actors Morgan Freeman and Tom Hanks, which indicates that male sports stars are much more highly regarded than female athletes in America. Additionally, this also shows the high popularity of basketball as opposed to tennis in the US.

In fact, aside from Mexico and Russia, male athletes feature in the top ten in all other 13 countries assessed with Yao Ming in China and Ishiro Suzuki in Japan being the number one celebrities as well as most marketable athletes in their respective countries. Spain is the country with the highest preponderance of sports athletes amongst male celebrities with Spanish goal keeper Iker Casillas being number one, followed by basketball star Pau Gasol and tennis maestro Rafael Nadal occupying the top three spots. Will Smith is the first non-sport star to feature in Spain's top celebrities at number four. Thus, in Spain, China and Japan, male athletes are seen as more credible and more revered compared to other male celebrities such as actors and singers.

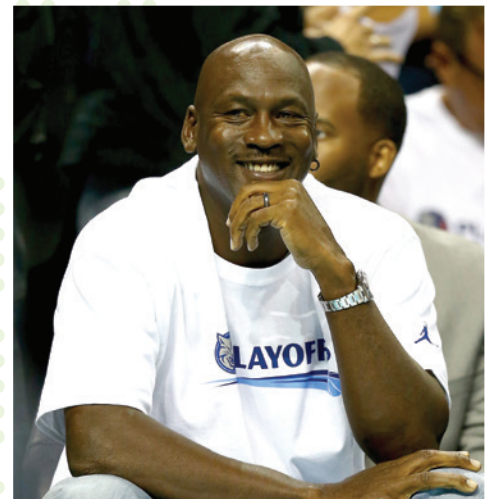
Most marketable male celebrities worldwide across all categories

NO 1 BILL GATES DBI 87.46	NO 6 GEORGE CLOONEY DBI 84.72
NO 2 BRAD PITT DBI 87.20	NO 7 JACKIE CHAN DBI 84.47
NO 3 DAVID BECKHAM DBI 86.76	NO 8 MICHAEL JORDAN DBI 84.00
NO 4 WILL SMITH DBI 86.54	NO 9 TOM CRUISE DBI 83.96
NO 5 LEONARDO DI CAPRIO DBI 85.99	NO 10 MORGAN FREEMAN DBI 83.91

MALE CELEBRITIES



Former football star David Beckham is number three in most marketable male celebrities worldwide.

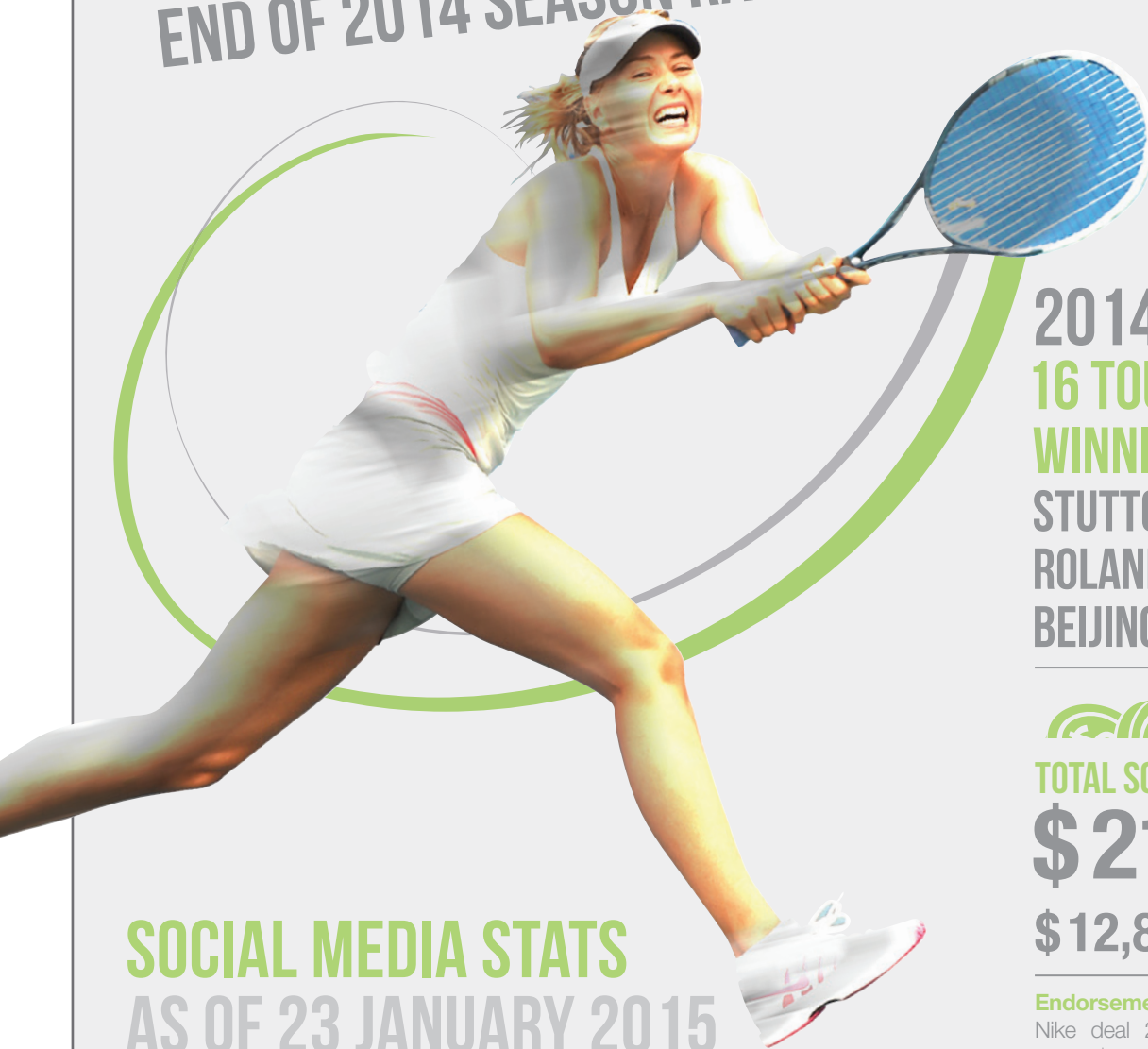


American basketball legend Michael Jordan is number eight amongst the most marketable male celebrities worldwide.

CASE STUDY

BATTLE OF THE SEXES: MOST MARKETABLE FEMALE vs MOST MARKETABLE MALE TENNIS PLAYER

GLOBAL DBI SCORE **74.28**
MARIA SHARAPOVA
END OF 2014 SEASON RANKING: **WORLD #2**



2014 RESULTS:
16 TOURNAMENTS
WINNING 4 TITLES:
STUTT GART, MADRID,
ROLAND GARROS AND
BEIJING

 1 DECEMBER 2014 -
7 JANUARY 2015

TOTAL SOCIAL MEDIA VALUE
\$219,323
\$12,884 per post

Endorsement deals:

Nike deal 2010 to 2017 estimated at US\$ 70 million. Other sponsors include: Head, Cole Haan, Samsung electronics, TAG Heuer, evian, Porsche, Pinkberry and Avon Luck. Reportedly earns US\$ 15 to 20 million per season (including Nike deal).

SOCIAL MEDIA STATS
AS OF 23 JANUARY 2015

 **15,287,563 LIKES** First tennis player to surpass 15 million Likes on Facebook

 **1,440,000 FOLLOWERS**

Source for sponsorship figures: Repucom's Sponsorglobe. Source for media evaluation: Repucom's social media valuation model.

GLOBAL DBI SCORE **80.68**
ROGER FEDERER WORLD **#2**
END OF 2014 SEASON RANKING:



2014 RESULTS:
17 TOURNAMENTS
WINNING 5 TITLES:
DUBAI, CINCINNATI,
SHANGHAI, HALLE AND
BASEL

 1 DECEMBER 2014 -
7 JANUARY 2015

TOTAL SOCIAL MEDIA VALUE

\$188,777

\$ 9,884 per post

Endorsement deals:

Nike deal 2008 to 2017 estimated at US\$ 130 million. Other sponsors include: Credit Suisse, Mercedes-Benz and National Suisse. Reportedly earns US\$ 40 to 50 million per season (including Nike deal).

SOCIAL MEDIA STATS
AS OF 23 JANUARY 2015



14,869,268 LIKES



2,570,000 FOLLOWERS

WOMEN TOMORROW

Repucom has a vast mountain of data tracking shifts in women's attitudes and behaviour in relation to sport over the last decade. The selection of insights in this report shows that these recent changes are the latest development in even bigger differences in our society stretching back to the 1970s and before, which the media revolution in this last decade has accelerated and amplified. In our mobile and digital world, both men and women can access a much broader range of interests, including sport – and the gap between how men and women partake in sport and which sports they are interested in is shrinking.

A major driver of this change is women's participation in sport both as children and adults. Taking part in sport drives life-long interest, but it also drives engagement with the brands associated with sport and the level of behaviour change sponsors can expect to inspire in women. Understanding the triggers and barriers to participation, and how these differ for men and women, is therefore one of the future keys to success in the sports marketing industry.

2015 is the next chapter in the history of women and sport. The FIFA Women's World Cup in Canada this year will be an important marker, but the combination of public policy focus in this area and the underlying need for brands and sports to connect with women in a relevant and authentic way has created unstoppable momentum. The second generation of women in sport has arrived.

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REPUcom

Repucom is a leading global marketing research company providing data, insights and intelligence to clients in every area of sports marketing, sports media and sponsorship.

We understand the DNA of sports fans - what they hear and see, how they react and how their behaviour changes over time. This knowledge is at the heart of making great marketing and sponsorship decisions in a crowded and increasingly costly market. Repucom has 1,400 employees in over 20 offices around the world.

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