

WOMEN AND SPORT

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

LIGHT VERSION

WOMEN FANS

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

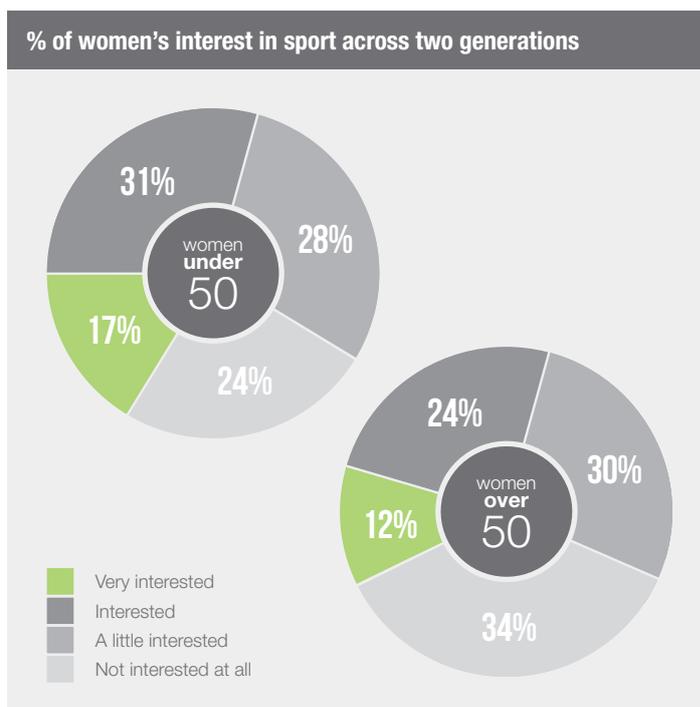
Music, movies and travel generally top the ranking of interests for both men and women around the world. Differences in interest between men and women usually emerge lower down the list with women tending to prefer arts, culture and social interests whilst men focus more on technology and sport.

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

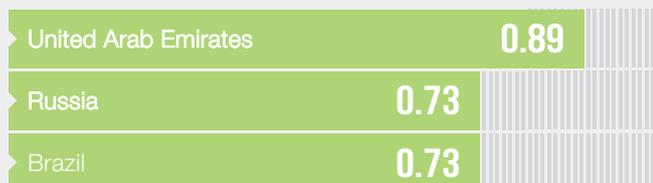


Source: Fan DNA Survey, August 2014, total for eight countries (USA, UK, Germany, Mexico, Malaysia, China, Japan, Australia), respondents aged 16-65 at least a little interested in sport (80-95% of total age group population) n=24,024

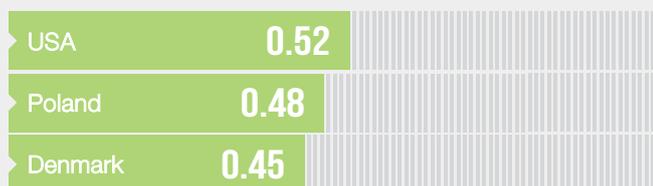
Index of men's and women's interest in watching sports on TV measured across six countries

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

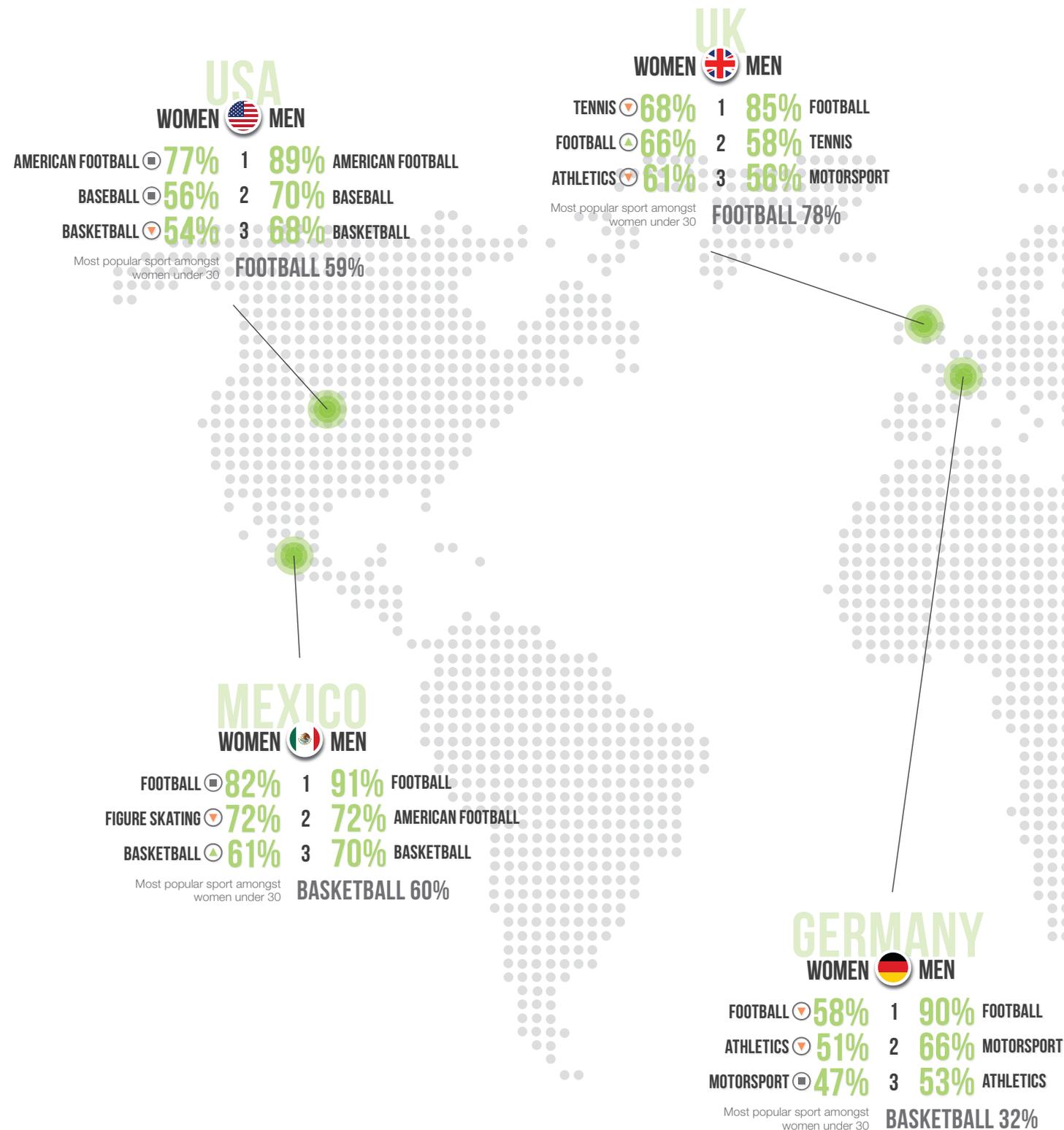
Source: Repucom SportsDNA, May 2014, average of 24 major countries (Argentina, Australia, Brazil, Canada, China, Denmark, France, Germany, India, Indonesia, Italy, Japan, Malaysia, Mexico, Poland, Russia, Singapore, South Korea, Spain, Turkey, United Arab Emirates, UK, USA, Vietnam), respondents at least 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, 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!"

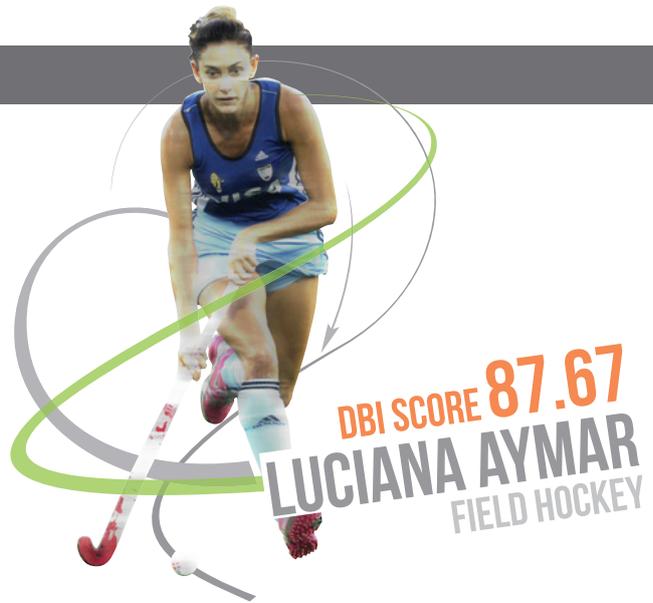
Since the launch last year, of the 1,505 conversations started about the "I Will What I Want" campaign, 286 conversations per day were the peak for the ad featuring Misty Copeland compared to the peak of 156 per day for supermodel Gisele Bündchen. Significantly, although the "I Will What I Want" advertisements 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.

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



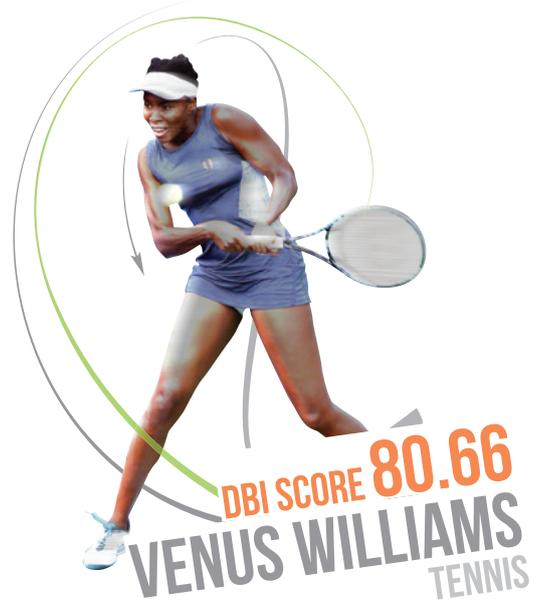
Ochoa is considered the best Mexican golfer in the history of the sport and was the top-ranked female golfer in the world for over three years, from April 2007 until her retirement in May 2010 aged 28. The Mexican golf prodigy won the 2006 Associated Press Female Athlete of the Year award. In 2007, it 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.

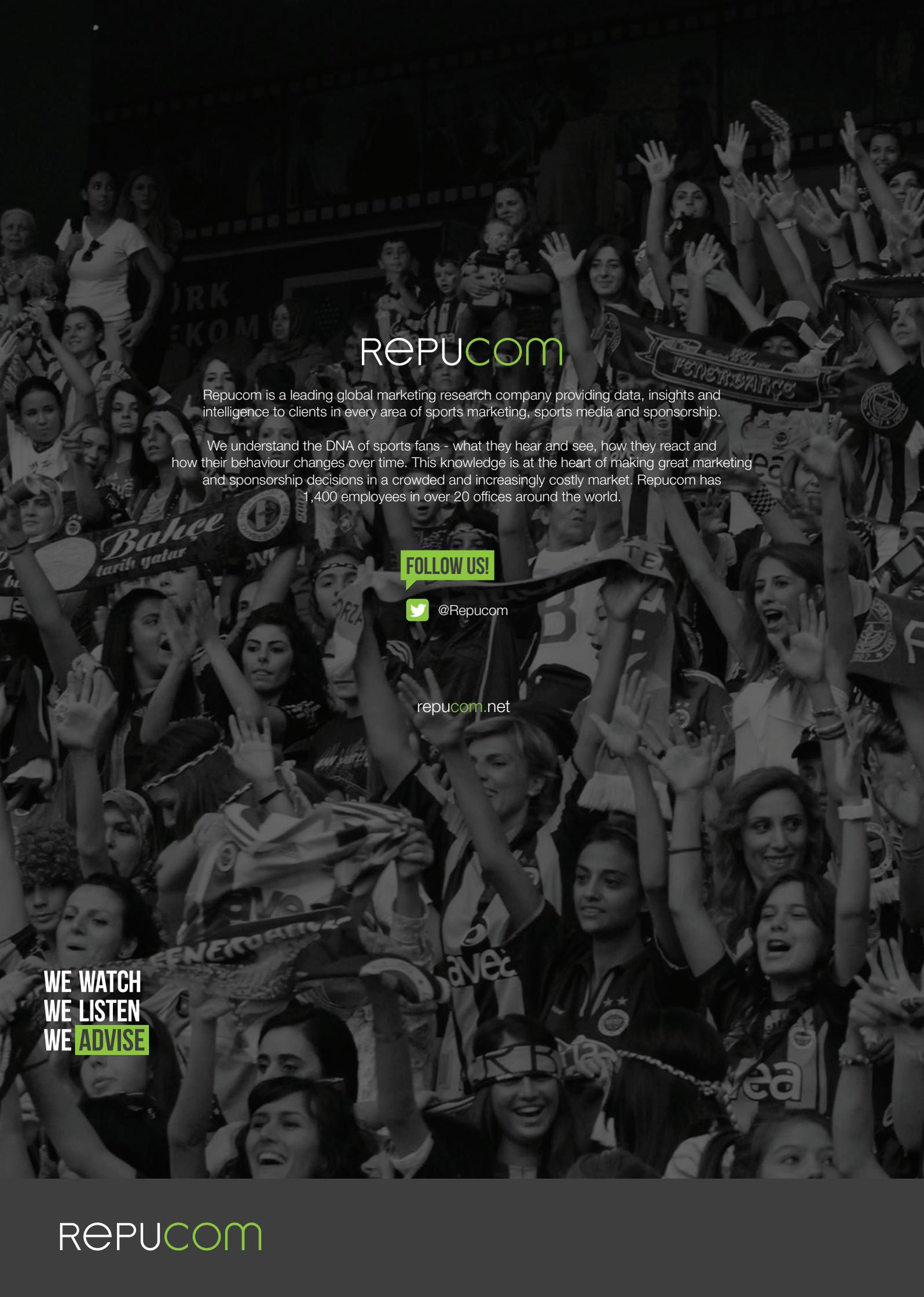
Date of Birth: 14 June 1969
 Birthplace: Mannheim, Germany



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





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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