

Since our last report in 2021, women's sports growth has not slowed down. Records continue to be broken across the board – attendance, viewership, sponsorship revenue, purse sizes, etc.

Women's sports are here to stay and it's time for more brands to tap into them to unlock new, valuable demographics.







HIGHEST ATTENDED WOMEN'S SPORTING EVENT IN THE WORLD

5



FIFA.

SIMONE BILES BECOMES FIRST GYMNAST IN HISTORY TO WIN 8 U.S. ALL-AROUND TITLES!

#BECAUSEOFTHEMWECAN

2023 ICC Women's T20 World Cup

ENDEAVOR ANALYTICS 3



+ + +

2:11:53 TIGST ASSEFA MARATHON



2023 WAS A RECORD-BREAKING YEAR FOR WOMEN'S SPORTS

JANUARY 2023

14-year-old Gaon Choi became the youngest X Games snowboard halfpipe champion, beating out Chloe Kim's record by 6 months

MARCH 2023

The Women's NCAA Basketball Round of 16 viewership increased 73% from 2022, while the Elite Eight increased 43%

2.5

towa 22

MAY 2023

Roku launches "Women's Sports Zone" with dedicated access to women's games and on demand content

FEBRUARY 2023

The ICC Women's T20 World Cup was the most watched ICC women's event ever, with global viewing hours increasing 44% from 2020

APRIL 2023

The Women's NCAA basketball final drew 9.9M viewers, up over 100% from the 2022 final

JUNE 2023

The Women's Ashes was watched by 5.3M viewers – double the 2019 viewership

JULY 2023

U.S. sees most-watched LPGA U.S. Women's Open since 2014, up 118% from 2022

SEPTEMBER 2023

Coco Gauff's U.S. Open final win drew 3.4M viewers – a 92% increase over 2022 and to beat the men's final by over 1M viewers

NOVEMEBER 2023

Emma Hayes became the highest-paid women's football coach when she signed with the USWNT

AUGUST 2023

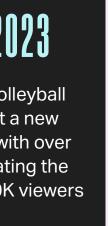
Simone Biles wins her 8th all-around title to break the record for most title wins set in 1933

OCTOBER 2023

Attendance during the A-League Women opening weekend broke multiple records

DECEMBER 2023

The 2023 NCAA Volleyball Championship set a new viewership record with over 1.69M viewers, beating the previous high by 400K viewers



KEY TAKEAWAYS

- Women's sports fans have strong concerns they want sponsors to address, including 43% wanting sponsors to commit to equal support of men's and women's sports
- Women's sports fans are more receptive to sponsors than men's sports fans by an average of 4.7% points across key responses to sponsorship, including 2.1% more likely to purchase the sponsor's product/service
- Brands are continuing to lean into women's sports. For example, the personal care category has seen over a dozen sponsorship deals signed with women's sports leagues and teams, and several deals with individual female athletes

ACROSS THE GLOBE, WOMEN'S SPORTS LEAGUES AND TEAMS ARE SURGING

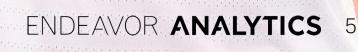
- Fandom has increased dramatically over the past year the WNBA and NWSL have seen increases in fandom of 7% and 11%, respectively
- Broadcasters are starting to meet the demand
 - India's Women's Premier League signed a \$23.2M/year broadcast deal
 - The NWSL recently signed a new media rights deal for \$60M/year a 40X increase from the previous deal
 - NCAA women's sports set viewership records for March Madness, Women's College World Series, and Women's Gymnastics
- Attendance continues to soar

 - 13 of the highest attended women's soccer matches globally were in the last two years, including Barcelona vs. Wolfsburg with over 91K attendees,
 - NWSL attendance saw 36% growth in the 2023 season
 - The Women's World Cup saw a 42% increase in average match attendance from 2019

FEMALE ATHLETES ARE CONTINUING TO SEE SPONSORSHIP DEALS ROLL IN

- Investment in female athletes has increased 49% from 2017 to 2022, with an 18% increase from 2021 to 2022 alone
- The number of deals for female athletes has grown an average of 24% per year since 2012
- Female NCAA athletes are taking advantage of NIL Livvy Dunne is the highest paid female athlete with a \$3.2M NIL valuation, followed by Angel Reese at \$1.7M

• The Nebraska women's volleyball match against University of Nebraska Omaha set a global women's sports record attendance of over 92,000



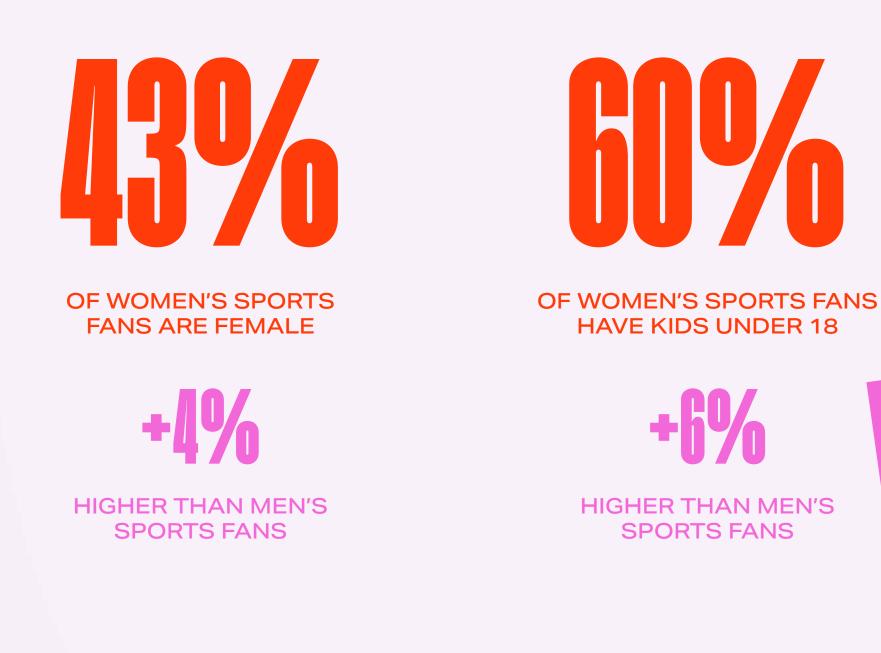




WHY DO WOMEN'S SPORTS FANS MATTER?

Championing women's sports extends beyond financial backing; it offers a platform for commitment to equality and transformational change in the world of sports.

Women's sports fans skew more female, are younger, and have younger children compared to their various male counterparts, offering unique and new engagement opportunities for brands. They are passionate about their favorite teams, leagues and, when executed correctly, their sponsors.



Source: Women's Sports Trust; The Office for Women in Sport and Recreation; GWI Sports



"THE DIFFERENCE BETWEEN MEN'S AND WOMEN'S SPORT FANS IS EYE-OPENING,"

-TAMMY PARLOUR, CEO AND CO-FOUNDER OF THE WOMEN'S SPORT TRUST

> FOR EVERY \$1 CORPORATE SPONSORS INVEST IN WOMEN'S SPORTS, THEY SEE AN AVERAGE **CUSTOMER VALUE RETURN OF \$7.29**



IF VOU AIR IT, THEY MILL MATCH

Historically, access to women's sports broadcasts has been limited, leading to low viewership and overall awareness of matches. Women account for 40% of sports professionals globally, but only receive 4% of sports media coverage. But there is demand for more.

OF COMMITTED WOMEN'S SPORTS FANS WANT MORE NON-LIVE WOMEN'S SPORT CONTENT AVAILABLE

OF THE U.S. GENERAL

POPULATION WANT MORE MEDIA EXPOSURE FOR WOMEN'S SPORTS



OF COMMITTED WOMEN'S SPORTS FANS WOULD PAY A SUBSCRIPTION FEE TO ACCESS A **DEDICATED WOMEN'S SPORTS-ONLY CHANNEL**

WHEN WOMEN'S SPORTS ARE **BROADCAST, FANS WATCH**

10.4M HOURS

OF THE 2023 WOMEN'S SIX NATIONS WAS WATCHED – THE MOST WATCHED TOURNAMENT ON **RECORD BY NEARLY 3M HOURS**

4 - 111111

AVERAGE VIEWING TIME OF WOMEN'S SPORTS PER PERSON IN 2023 - A 28% INCREASE FROM 2022

2.9M FANS

WHO HAD NOT WATCHED ENGLAND'S MEN'S OR WOMEN'S TEAMS PLAY **CRICKET BEFORE WATCHED THE** 2023 WOMEN'S ASHES

131% YEAR-OVER-YEAR INCREASE **IN WOMEN'S SPORTS**

VIEWING IN THE U.K.

OF THE NETBALL WORLD CUP – AN INCREASE OF **OVER 1M VIEWERS**

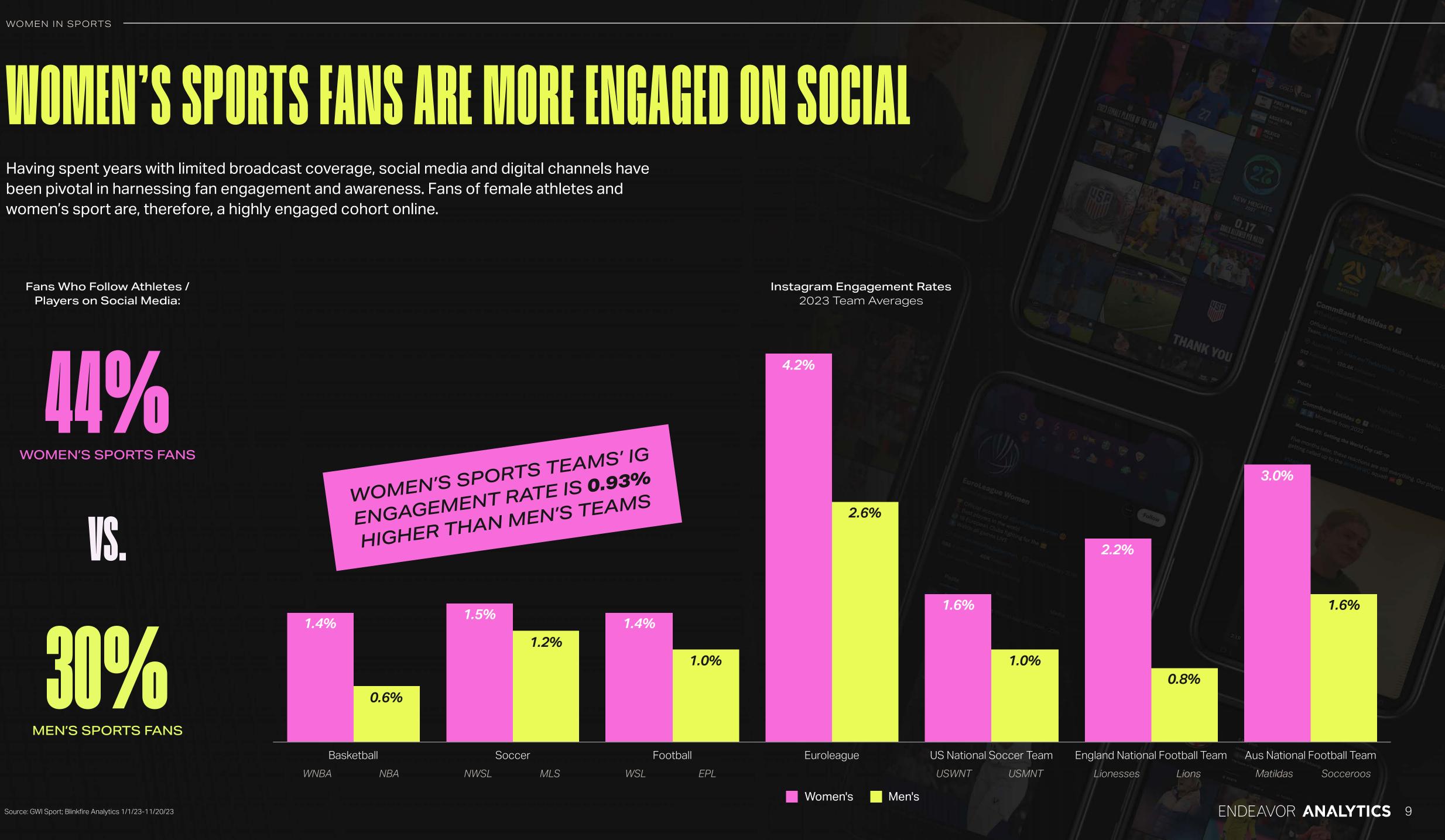
OF THE SOLHEIM CUP'S VIEWERS DID NOT WATCH THE RYDER CUP - SHOWCASING A UNIQUE AUDIENCE FOR WOMEN'S GOLF

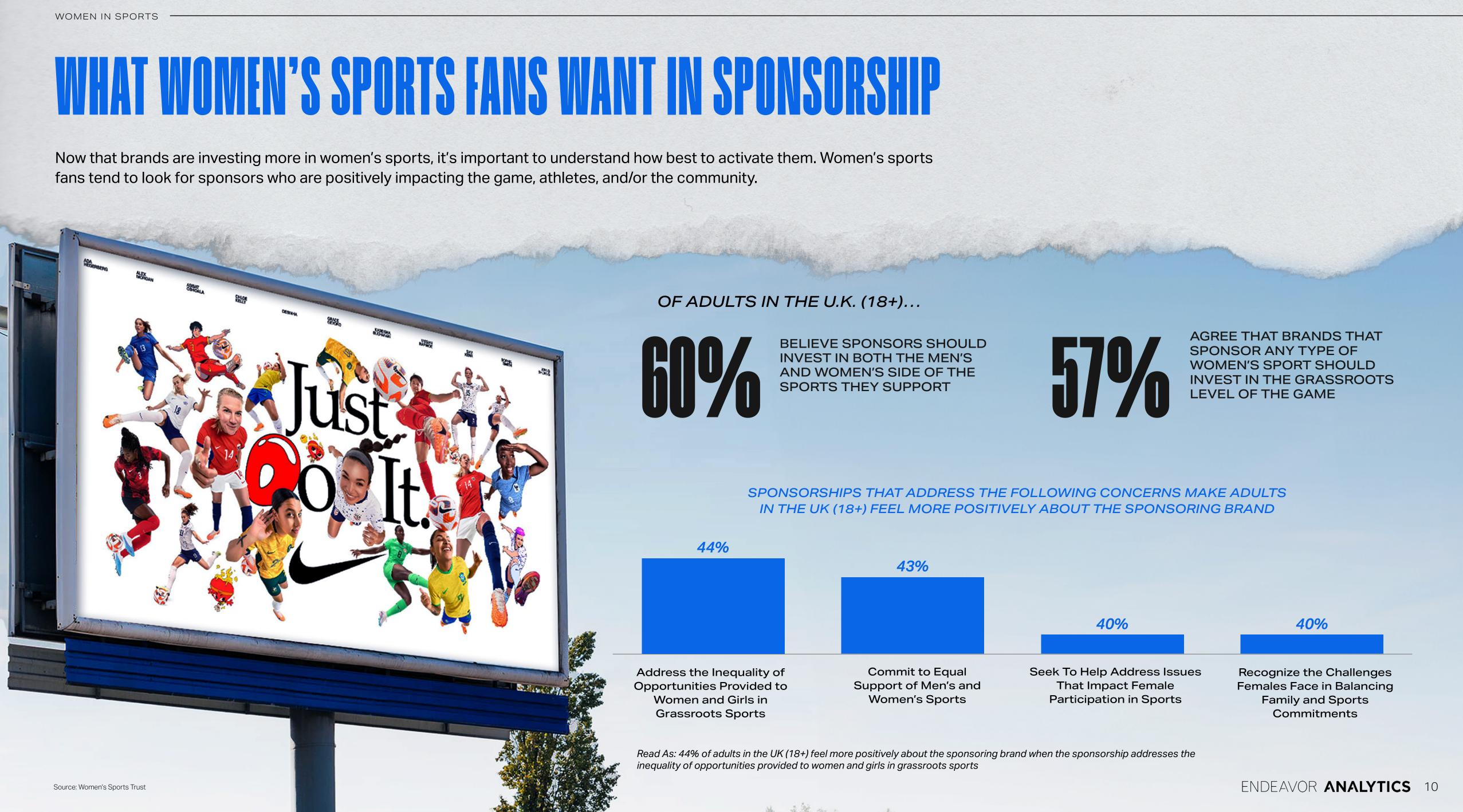




WOMEN'S SPORTS FANS ARE MORE ENGAGED ON SOCI

been pivotal in harnessing fan engagement and awareness. Fans of female athletes and







DMEN'S SPORTS FANS ARE MORE RECEPTIVE TO SPONSORS THAN MEN'S **SPORTS FANS**

Actions Taken After Seeing a Sponsorship

ON AVERAGE, WOMEN'S SPORTS FANS ARE 4.7% POINTS HIGHER THAN MEN'S SPORTS FANS FOR POSITIVE RESPONSES TO SPONSORSHIP



36%

42%



Consider the Brand More Than Competitors

Engage With the Brand

+5.8%

Purchase the Brand

+2.1%

Men's Sports Fans

+4.3% +4.5% +2.4% 7.9% 47% 45% 45% 44% 43% 41% 40% 36% **Research the Brand**

See the Brand as Integral to the Development of my Favorite Team/League

Talk to Family/Friends About the Brand

More Positively

Women's Sports Fans





WOMEN IN SPORTS · ENDEAVOR ANALYTICS · WOMEN IN SPORTS · ENDEAVOR ANALYTICS · WOMEN IN SPORTS · END

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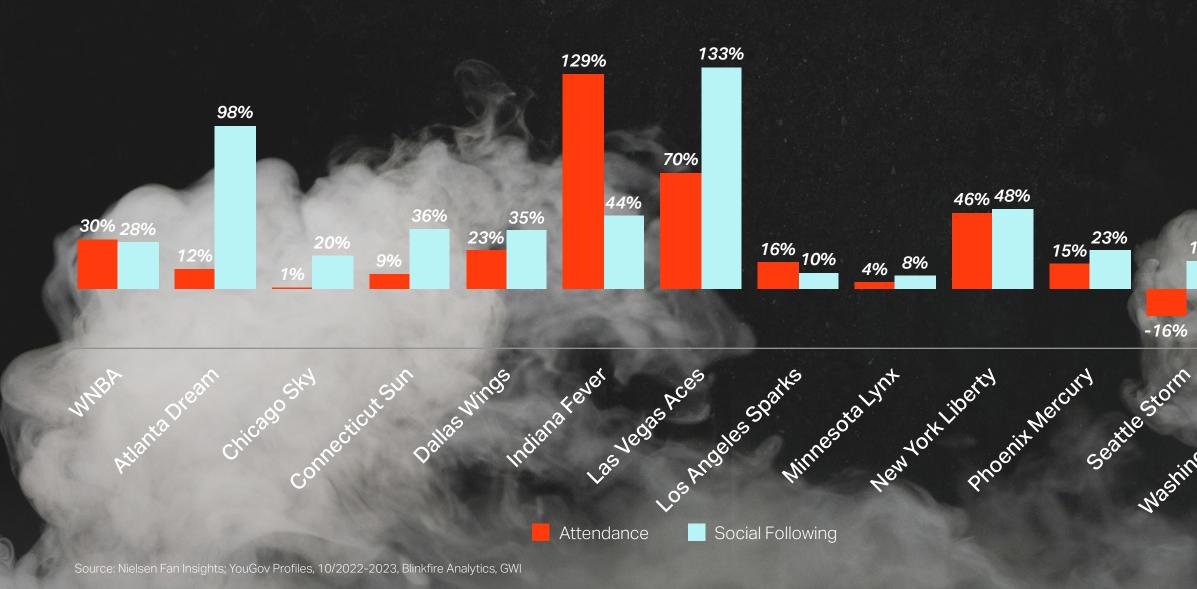
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2023 was an an extraordinary year of growth for the WNBA. Overall WNBA league fandom increased 7% from October 2022 to 2023, while avid WNBA fans increased by 12%. Team social following grew by an average of 44% from 2022. The league was also expected to achieve **\$200M** in revenue in 2023 - a **100%** increase from 2019.

WNBA fans are 6.5% points more receptive to sponsors than NBA fans across key receptivity questions, including 4% more likely to purchase a sponsor's product, 7.3% more likely to talk about the sponsor to friends and family, and 13% more likely to consider the sponsor integral to the development of their favorite teams/leagues.

WNBA fans represent **\$1.3T** in purchasing power which only continues to grow as the league surges and represents immense opportunities for sponsors to tap into.



WNBA Attendance and Social Following Growth From 2022-23

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2023 SEASON KEY STATS

- THE 2023 WNBA DRAFT PRESENTED BY STATE FARM AVERAGED 572K VIEWERS ON ESPN -AN INCREASE OF 42% OVER 2022 AND THE **MOST-WATCHED DRAFT SINCE 2004**
- BRITTNEY GRINER'S RETURN DREW 638K AVERAGE VIEWERS – THE MOST-VIEWED **REGULAR SEASON WNBA GAME ON CABLE IN 24 YEARS**
- THE AT&T WNBA ALL-STAR GAME SAW AN AVERAGE VIEWERSHIP OF 850K ON ABC - THE MOST-VIEWED WNBA ALL-STAR GAME IN 16 YEARS
- THE 2023 SEASON WAS THE MOST WATCHED WNBA REGULAR SEASON ACROSS ABC, CBS, AND ESPN IN 21 YEARS WITH 505K AVERAGE VIEWERS
- THE WNBA ANNOUNCED THE FIRST NEW **EXPANSION TEAM SINCE 2008 TO BE IN THE** BAY AREA, STARTING TO PLAY DURING THE 2025 SEASON
- THE 2023 WNBA FINALS AVERAGED 728K VIEWERS PER GAME, UP 36% FROM 2022 AND GAME 4 AVERAGED 889K VIEWERS, MAKING IT THE HIGHEST VIEWED GAME 4 ON RECORD, AND REPRESENTS A 124% INCREASE **OVER 2022**

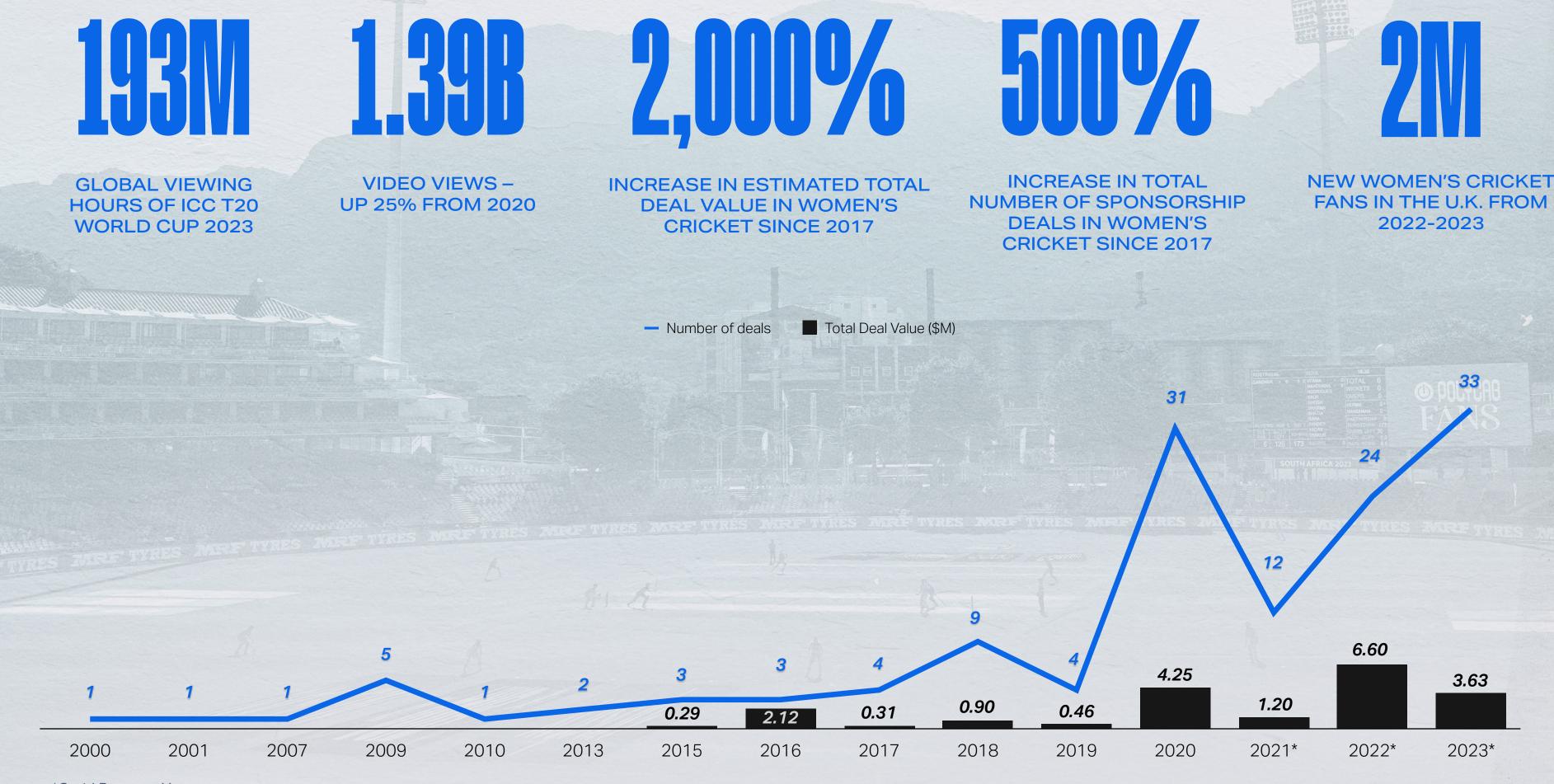






SPOTLIGHT ON: CRICKET

In January 2023, India's Women's Premier League received a \$580M investment in five franchises and signed a \$116M broadcasting deal over five years. In February 2023, the ICC Women's T20 World Cup 2023 was the most watched ICC women's event to date.



*Covid Recovery Year

Source: ICC, GlobalData, Women's Sport x BBC Sport, October 2023



FANS IN THE U.K. FROM

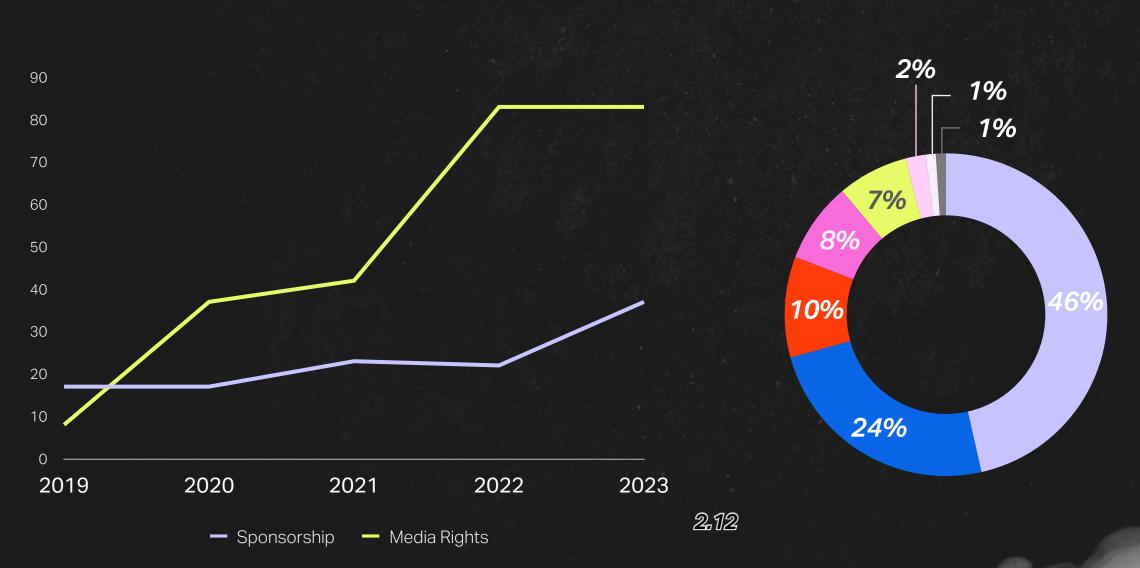


SPOTLIGHT ON: MIDDLE EAST & AFRICA

Two major women's tournaments took place in South Africa in 2023: the ICC Women's T20 World Cup and the Netball World Cup 2023. The first time the latter event has ever been hosted by an African nation.

South Africa saw an 130% increase in live coverage of the ICC Women's T20 World Cup in 2023, with the final broadcast on free-to-air television. An increase in broadcast coverage in the region was spearheaded by SuperSport who struck a new deal covering 52 Africa territories earlier in the year.

In Saudi Arabia, PepsiCo owned Lay's was announced as the first-ever headline sponsor for SAFF's women's league ahead of the 2023/24 season, while the AI Ittihad Ladies also made its first splurge in international talent signing Nigerian national and Leicester City defender Ashleigh Plumptre. The SAFF Women's Premier League also landed an international broadcast rights agreement with DAZN.



Number of Deals With Female-Focused MEA Rightsholders

Share of Deals by Rightsholder Country

Qatar
 United Arab Emirates
 South Africa
 Tunisia
 Morocco
 Kenya
 Saudi Arabia
 Cameroon

Ons Jabeur became the first African woman to reach a Grand Slam final at Wimbledon in 2022. In the Iast 12 months, she has gained over 768K new followers across Instagram, Facebook, and Twitter.

> Nigerian and FC Barcelona soccer player Asisat Oshoala currently has 1.1M followers on Instagram, 19K on TikTok and 432K on Twitter*, having seen 12% growth on TikTok over the last 12 months. She has also benefitted from growing endorsements, with four new sponsorship deals since 2019 –



SPOTLIGHT ON: F1 AND SAILGP: MAKING WAY FOR WOMEN

FORMULA 1 ACADEMY



POSITIVE SOCIAL SENTIMENT

Positive Negative

PARTNER SPOTLIGHT: AMERICAN EXPRESS

MARTA GARCIA

2023 F1 ACADEMY CHAMPION

- 2023 Spanish driver for Prema Racing
- First F1 Academy Champion
- After 2023 F1 Academy season, signed a fully funded seat with Prema Racing for the 2024 Formula Regional European Championship
- Previously raced in **Spanish F4 Championship** & W Series
- **262,000+** social followers

McLaren sign F1 Academy's Bianca Bustamante as first female member of Driver Development Programme

F1 Academy: First-ever season concludes on United States GP weekend live on Sky Sports F1

Watch F1 Academy live for the first time from Friday afternoon on Sky Sports F1, ahead of three races across Saturday and Sunday; Spain's Marta Garcia the big favourite for the maiden title and says series growth is "going to give a lot of opportunities to young

AS PART OF ITS REGIONAL PARTNERSHIP WITH FORMULA 1. AMERICAN EXPRESS WILL BE A AMERICAN EXERCISE MEEDER SUPPORTING PARTNER OF THE FORMULA 1 ACADEMY

SAILGP WOMEN'S PATHWAY

MEET HANNAH MILLS

- Strategist for Team GB in SailGP
- 2 Time Olympic Gold Medalist
- 8 Time World Championships Medalist
- Founder of the **Big Plastic Pledge**: a foundation centered around athletes and the sporting community uniting to tackle single use plastic in sport
- **19,000+** social followers

SINCE ITS LAUNCH IN SEASON 2 OF SAILGP (2021), THERE HAVE BEEN FEMALE ATHLETES ONBOARD ALL TEAMS IN 100% OF RACES

IN EARNED MEDIA **VALUE IN SEASON 3**

IN EARNED MEDIA **REACH IN SEASON 3**



In 2023, UFC celebrated the 10th anniversary of having female fighters. In just a short time, female fighters have become an integral part of the sport and are driving high viewership and fan engagement.

17%

GROWTH IN THE NUMBERS OF FEMALE **FIGHTERS SINCE 2019**

30%

OF 2023 EVENTS WERE HEADLINED OR CO-HEADLINED **BY FEMALE FIGHTERS**



FEMALE FIGHTERS ON THE ROSTER IN 2023 REPRESENTING...

IN SEPTEMBER 2023, UFC CELEBRATED MEXICAN INDEPENDENCE DAY WITH THE INAUGURAL NOCHE UFC EVENT, HEADLINED BY AN EPIC MATCHUP BETWEEN ALEXA GRASSO AND VALENTINA SCHEVENKO. THE EVENT BECAME:

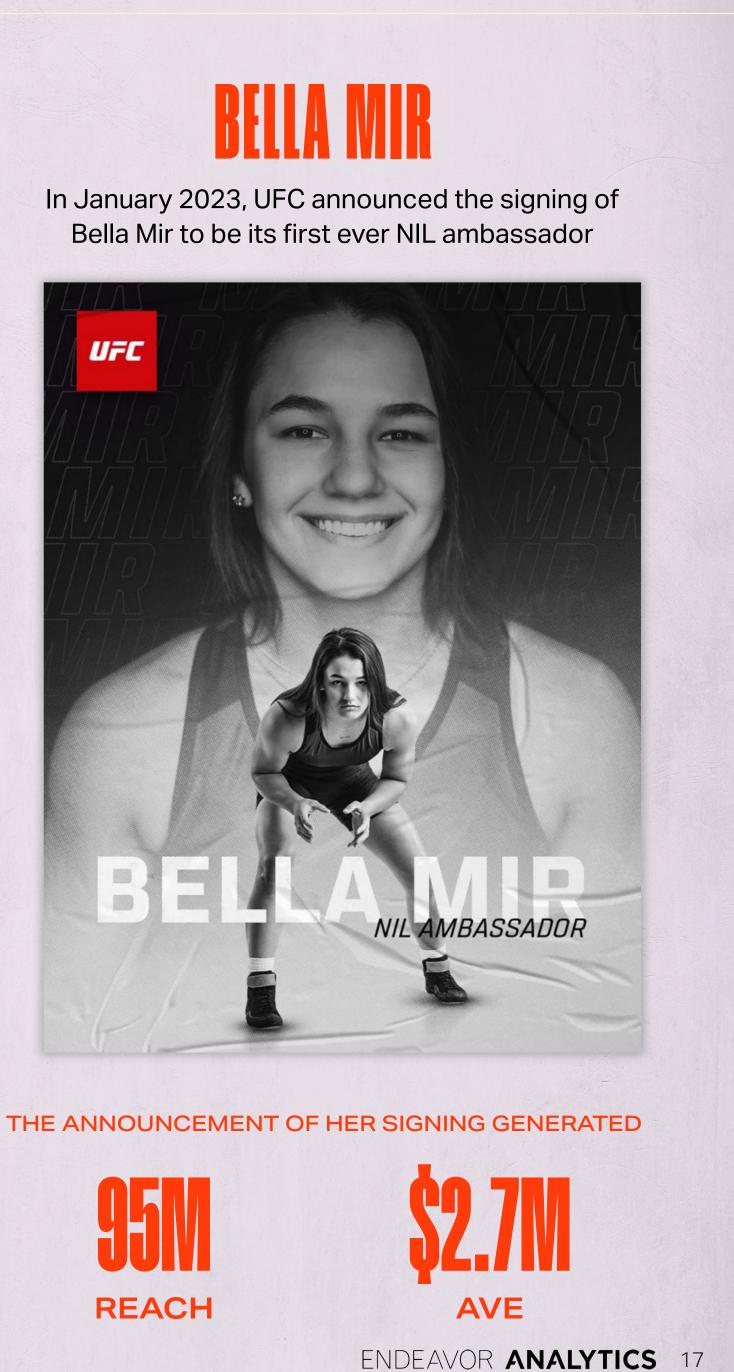
- The most viewed UFC Fight Night of all time on ESPN+
- The second most viewed UFC Fight Night in 2 years on ESPN Deportes
- The second highest driver of UFC.com visits for a single Fight Night in 2023

SINCE 2013, UFC HAS HAD GENDER PARITY ACROSS...

- RULE SETS
- EQUIPMENT
- ROUND LENGTH
- PLAYING FIELD
- PAY REGULATIONS
- PROMOTION

COUNTRIES









SPOTLIGHT ON: NGAA SPORTS

.Women's collegiate athletics is constantly breaking records, both on and off the court. Tournaments are breaking viewership records, and single games are breaking attendance records, while ticket sale growth indicates this trend isn't slowing down either.

IN ATTENDANCE FOR NEBRASKA'S **VOLLEYBALL MATCH – WORLD RECORD** ATTENDANCE FOR ANY WOMEN'S SPORTING EVENT



VIEWERS ON BIG10 NETWORK

2023-10-06

Nebraska's Women's Volleyball Twitter Followers



Sources: Blinkfire, ESPN, Nielsen, MVP, SponsorUnited

2023-08-07

2023-08-03

2023-08-05

.08.01

AND THAT WAS ONLY THE START....

VIEWERS FOR THE LOUISVILLE-IOWA ELITE EIGHT GAME ON ESPN. **MORE THAN ANY 2022-2023** NBA GAME ON ESPN



SEASON TICKETS SOLD FOR LSU'S **2024 GYMNASTICS SEASON**

AFTER HAVING SOLD 7,400 SEASON TICKETS FOR THE 2023 SEASON, LSU SOLD OUT OF IT'S 2024 ALLOTMENT **OF SEASON TICKETS**



AVERAGE VIEWERS WATCHING 2023 WCWS CHAMPIONSHIP TITLE GAME (7% INCREASE YOY)



OF THE AD INVENTORY FOR THE WOMEN'S 2024 MARCH MADNESS TOURNAMENT HAD BEEN SOLD BY **MID-NOVEMBER 2023**

IOWA HAWKEYES



AVERAGE VIEWERS FOR 2023 NCAA WOMEN'S GYMNASTICS CHAMPIONSHIP (10% INCREASE YOY)

> **FEMALE VIEWERSHIP UP 11%** (COMPRISING AROUND 60%) OF THE AUDIENCE)



NINX

SPOTLIGHT ON: OLYMPIC SPORTS

Women showed up at the 2020 Olympics - 9 records were broken by women out of the 20 total records broken.

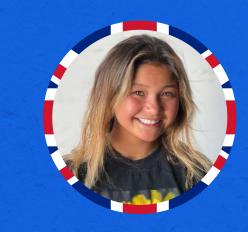
The top five mentioned athletes on Twitter were all female and female athlete-led posts drove 50% more engagements than male athlete led posts.

Looking forward, Paris 2024 will be the first Olympics to have the same number of females participating as males. Additionally, 50% of the members of IOC Commissions positions have been held by women since 2022 (up 30% from 2020).



Sources: YouGov Profiles, Olympics.com













OLYMPIANS OF NOTE

SKY BROWN GREAT BRITAIN | SKATEBOARDING

- Youngest (current age: 15) medalist for Great Britain by winning a bronze medal in the 2020 Summer Olympics
- 1.37M Social followers

SIMONE BILES **USA | GYMNASTICS**

- Has five moves named after her
- Most decorated gymnast in history

SYDNEY MCLAUGHLIN-LEVRONE

USA | TRACK & FIELD

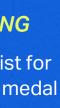
• Broke her own world record to win the 400M Hurdle Gold in the 2020 Olympics

YULIMAR ROJAS VENEZUELA | TRACK & FIELD

- Broke triple jump world record in 2020 Olympics
- Became the first woman from Venezuela to win an Olympic gold medal

ISABELL WERTH GERMANY | EQUESTRIAN

• First rider to win seven equestrian Olympic gold medals











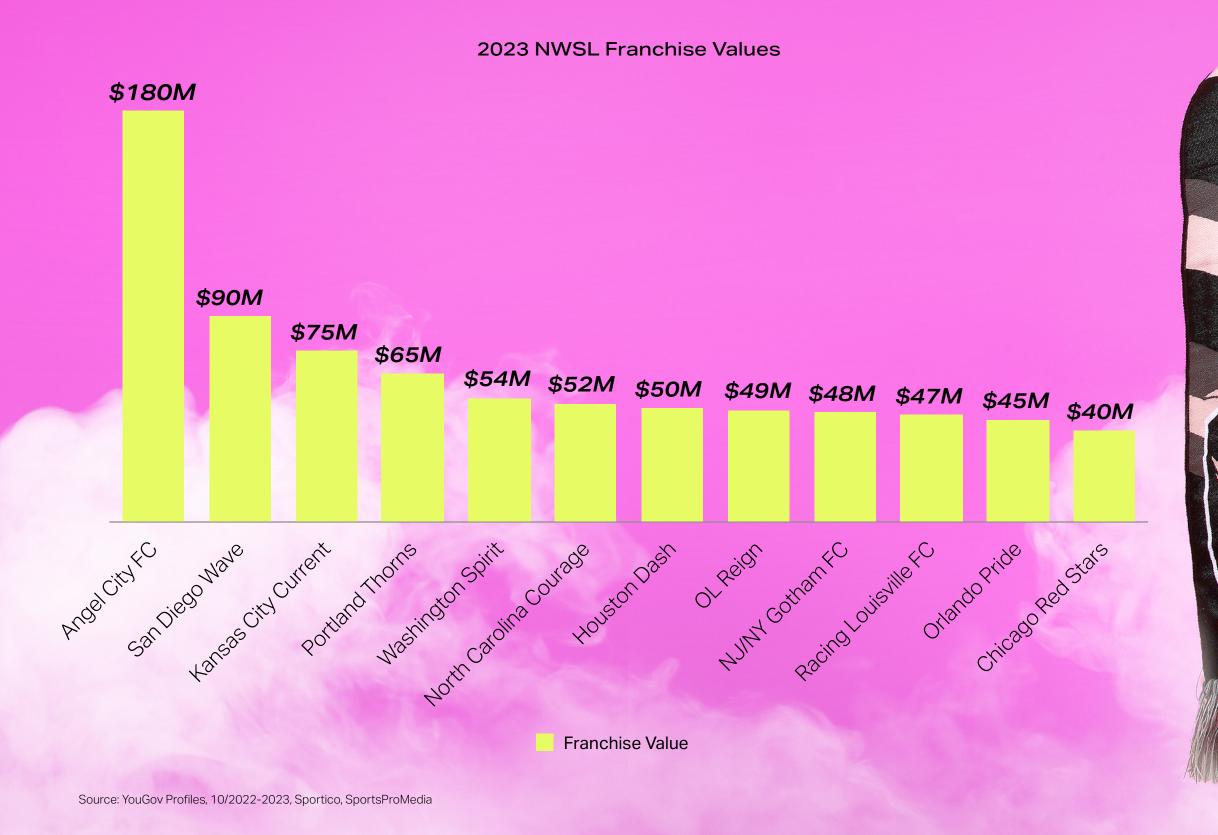




SPOTLIGHT ON: NWSL

The NWSL surged across numerous metrics in 2023, with fandom seeing an 11% increase over the past year. The league's social following has grown 28% since January 2022, while the team average has grown 32% (excluding San Diego who grew 428%).

Franchise values are also on the rise. Angel City FC's value reached \$180M in 2023 – higher than the two lowest English Premier League teams. NWSL teams are also averaging a 7.1X value-to-revenue multiples – beating out MLB, NHL, Formula 1, and EPL



2023 SEASON KEY STATS

- THE 2023 SEASON OPENING WEEKEND SAW OVER 90,000 ATTENDEES, INCLUDING OVER 30,000 AT THE SAN DIEGO WAVE'S HOME OPENER
- THE NWSL SET A LEAGUE RECORD OF 1.39M ATTENDEES ACROSS THE SEASON, A 36% GROWTH OVER THE 2022 SEASON
- 9 OF THE LEAGUE'S TEAMS HAD GAMES WITH OVER 10,000 ATTENDEES
- THE 2023 SEASON CHAMPIONSHIP MATCH SAW OVER 25,000 ATTENDEES AND AVERAGED 817,000 VIEWERS

DOORDASH

- THE NWSL ANNOUNCED 3 NEW EXPANSION TEAMS – UTAH ROYALS FC AND BAY FC WILL BOTH BEGIN PLAY IN 2024 AND NWSL BOSTON WILL START PLAY IN 2026
- THE LEAGUE SIGNED A NEW MEDIA RIGHTS DEAL THAT WILL SEE GAMES AIRED ON CBS, ESPN, AMAZON, AND SCRIPPS. THE DEAL IS \$60M A YEAR – A 40X INCREASE FROM THEIR PREVIOUS DEAL

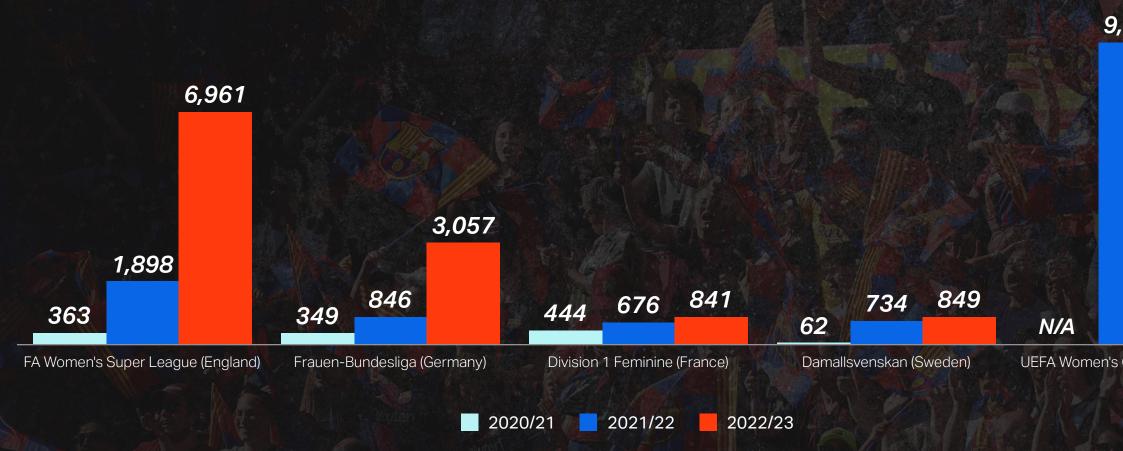


SPOTLIGHT ON: SOCCER IN EUROPE

The 2022 UEFA Women's Euros set precedence for the following months of major growth, particularly in England. 2023 also saw the build-up to the WWC providing various avenues of growth from attendance to sponsorship deals to a record-breaking transfer window in the WSL.

In the UK, 3/5ths of adults now consider themselves fans of women's soccer – 10M more than in October 2021. Additionally, European women's football is projected to reach **\$736M** in annual commercial returns by 2033.

The UK government and FA have announced they'll be investing a total of \$31.7M to create 30 new state-of-the-art pitches and facilities that prioritize grassroots women and girls football opportunities.



Average Match Attendance of Select Women's Soccer Leagues in Europe From 2020/21 to 2022/23

Source: Two Circles via Statista, FourFourTwo via Statista, GlobalData, Sky Sports, Forbes, Women's Sport x BBC Sport, October 2023, The Athletic.

23

10,800

9,043

UEFA Women's Champions League

THE DESCRIPTION

2023 SEASON KEY STATS

- ARSENAL MADE TWO WORLD-RECORD BIDS FOR ENGLAND STRIKER RUSSO - THE SECOND BELIEVED TO BE JUST UNDER £500,000
- CHELSEA REPORTEDLY MADE A £250,000 BID, WHICH WAS TURNED DOWN BY ARSENAL, FOR WINGER KATIE MCCABE
- TOTTENHAM ALSO SPLASHED OUT A BRITISH RECORD £250,000 FOR BETHANY ENGLAND EARLY IN THE WINDOW
- ARSENAL BECAME RECORD HOLDERS
 WITH 47,367 FANS IN ATTENDANCE FOR
 THE NORTH LONDON DERBY
- IN THE FIRST HALF OF THE 22/23 SEASON, CROWD NUMBERS WERE UP BY 267%, CREDITED TO PLAYING BIGGER GAMES IN THE LARGER STADIUMS
- THE WSL ARE ONE YEAR AHEAD OF SCHEDULE FOR THEIR WOMEN'S PROFESSIONAL GAME STRATEGY, IN WHICH THEY TARGETED AN AVERAGE ATTENDANCE ACROSS THE WSL OF 6,000 BY 2024



SPOTLIGHT ON: SOCCER IN EUROPE

Attendance figures for soccer globally have been continuously broken in recent years.

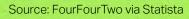
13 of the highest-attended women's soccer matches worldwide were in the last two years, five of which were more recently during the Women's World Cup in **Stadium Australia.**

Two of the top-most attended matches were at the club level, both taking place in Camp Nou, Barcelona in 2022.

Of the highest attended matches, five were at the club level. Arsenal and Barcelona are two clubs who have generated record attendance at their home stadiums in the past two seasons.

Barcelona vs Wolfsburg (Camp Nou, April 2022) Barcelona vs Real Madrid (Camp Nou, March 2022) United States vs China (Rose Bowl, July 1999) England vs Germany (Wembley Stadium, July 2022) England vs Brazil (Wembley Stadium, April 2023) United States vs Japan (Wembley Stadium, August 2012) England vs Germany (Wembley Stadium, November 2019) Chelsea vs Manchester United (Wembley Stadium, May 2023) Australia vs Denmark (Stadium Australia, August 2023) Australia vs Ireland (Stadium Australia, July 2023) Australia vs England (Stadium Australia, August 2023) Spain vs England (Stadium Australia, August 2023) England vs Colombia (Stadium Australia, August 2023) Great Britain vs Brazil (Wembley Stadium, July 2012) England vs Austria (Old Trafford, July 2022) France vs Japan (Wembley Stadium, August 2012) Atlético Madrid vs Barcelona (Metropolitano Stadium, March 2019) Arsenal vs Wolfsburg (Emirates Stadium, May 2023) United States vs Netherlands (Parc Olympique Lyonnais, July 2019) Club Level Matches

4-0 @



Highest-Attended Women's Soccer Matches Worldwide as of August 2023







MOMEN'S MORLD GUP BY THE NUMBERS



VIEWERS OF THE WOMEN'S WORLD CUP THAT DID NOT WATCH THE MEN'S

\$110M

2023 PRIZE MONEY – OVER 3X THE 2019 FUND



EXPECTED VALUE OF THE MATILDAS, MAKING IT THE MOST VALUABLE SPORTS TEAM IN AUSTRALIA



VIEWERS IN CHINA WHO WATCHED ENGLAND VS CHINA **1.98M**

ATTENDEES – UP 1.1M FROM 2019

PEAK AUDIENCE DURING THE FINAL – THE HIGHEST-EVER AUDIENCE FOR WOMEN'S SOCCER IN THE UK



VIEWERS OF ENGLAND VS SPAIN - SECOND MOST WATCHED BBC **BROADCAST IN 2023 AFTER THE** CORONATION

42%

INCREASE IN AVERAGE MATCH ATTENDANCE FROM 2019



VIEWERS OF USWNT VS **NETHERLANDS – THE MOST** WATCHED WWC GROUP STAGE MATCH IN THE U.S.



VIEWERS THROUGHOUT THE TOURNAMENT ON MENA **BROADCASTER BEIN SPORTS**





\$135M



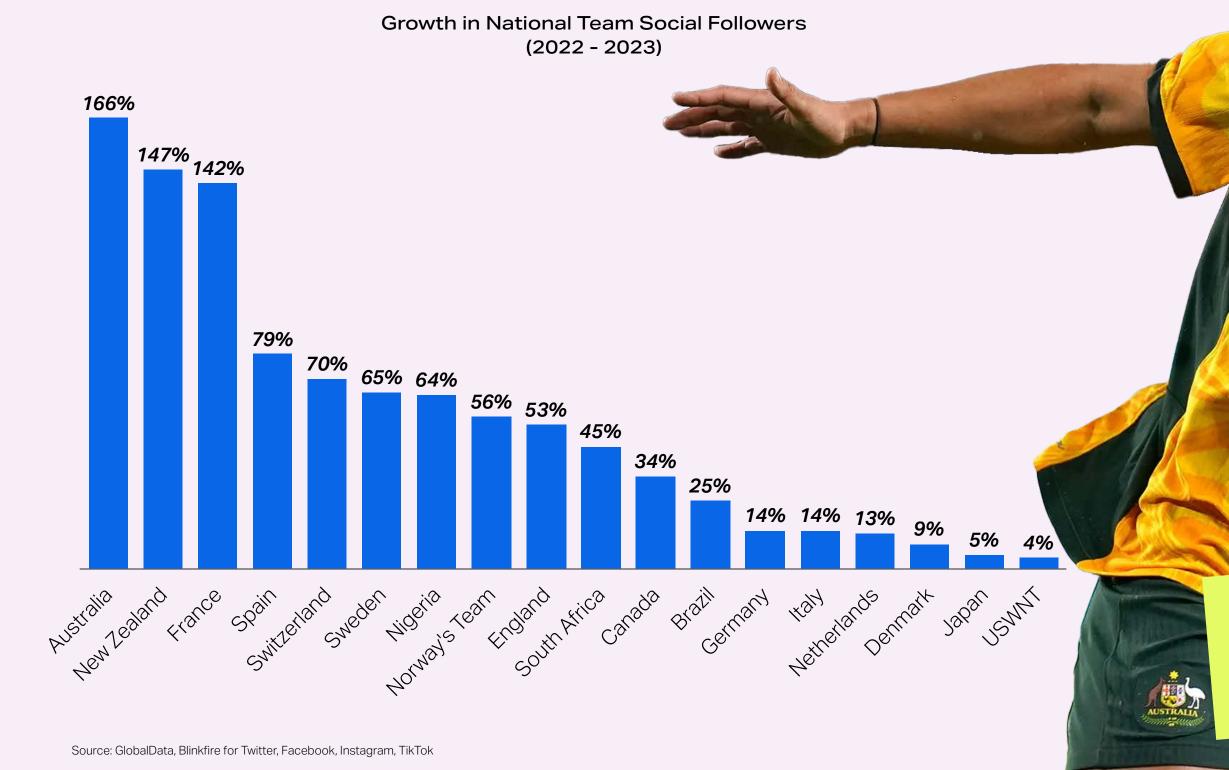


DEAVOR



THE WOMEN'S WORLD CUP HELPED SOCIAL FOLLOWING FLOURISH

New fans flocked to social media to follow their new-found favorite national teams and athletes. This plethora of new followers provides an even larger platform for teams, individuals and ultimately brand partners, who in turn are going to generate greater value off the back of this growth.



FRANCE, SPAIN AND SWITZERLAND SAW THEIR SOCIAL FOLLOWING SKYROCKET AN AVERAGE OF 97%, SPURRED BY THE TEAMS' ON PITCH PERFORMANCE

Équipe de France féminine 🔰

Compte officiel de l'Équipe de France féminine de

@ equipedefrancef

See Translation

football 🔮 #FiersdetreBleues

2 I-fff.co/3RxtbKr and 1 more

FIFA WOMEN'S WORLD CUP SAW 68% GROWTH IN THEIR TOTAL FOLLOWING ACROSS SOCIAL MEDIA IN THE SIX MONTHS LEADING UP TO AND DURING THE WORLD CUP

> fifawomensworldcup 🔹 🖸 1.4M

> > Posts Followers Followin

FA Women's World Cup

ifawomensworldcup

The official account of the #FIFAWWO

POST TOURNAMENT, AUSTRALIA (+3.1%) AND PHILIPPINES (+18.5%) HAVE LARGER TOTAL SOCIAL FOLLOWING COMPARED TO THEIR MALE COUNTERPARTS





ILTE 🗐

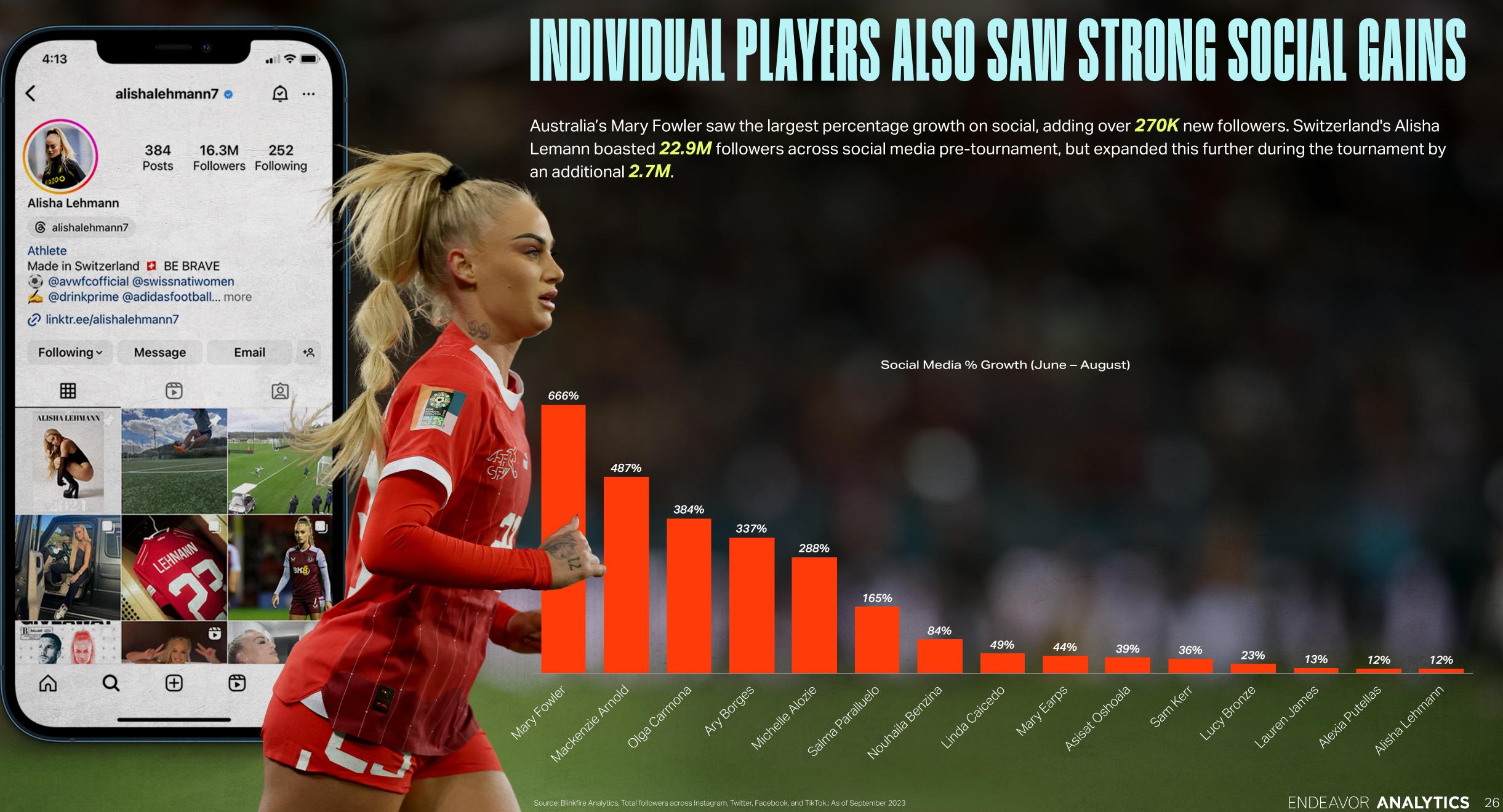
P

99

pedefrancef 🧔

360K

Posts Followers Following







USWNT VS USMNT FAN COMPARISON

Getting the advertising message correct is important, and men's and women's sports fans want different things from sponsors.

OF USWNT VIEWERS....

TZY6 LIKE WHEN COMPANIES HAVE A MORAL MESSAGE 63%

LIKE WHEN BRANDS ARE WILLING TO GET INVOLVED IN SOCIAL ISSUES 50%

WISH THEY COULD SEE MORE ADVERTISEMENTS WITH FAMILIES LIKE THEIRS

+7% HIGHER THAN USMNT VIEWERS



HIGHER THAN USMNT VIEWERS



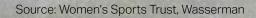
HIGHER THAN USMNT VIEWERS

PARTNERSHIP WITH USWNT GENERATED AN UPLIFT IN POSITIVE INTERACTIONS:









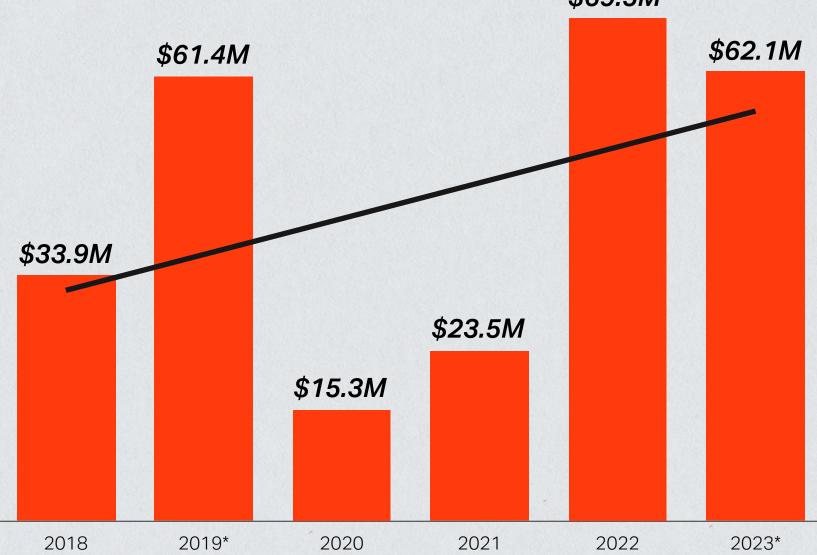


THE MONEY IS STARTING TO FLOW IN

Investment in women's soccer in Europe has continued to rise, with post-Covid recovery in 2022.

World Cup and Euros years have generated the greatest sponsorship value to-date.

> Deal Value in Women's Soccer Europe (By Deal Start Year)



\$69.5M

*Represents WWC year Source: FIFA; Global Data;



TOTAL REVENUE GENERATED AT THE 2023 WOMEN'S WORLD CUP -THE HIGHEST EVER GENERATED AT THE TOURNAMENT



WOMEN'S SPORTS SPONSORSHIP YEAR-OVER-YEAR GROWTH IN 2022



2023 WOMEN'S WORLD CUP TOTAL ANNUAL SPONSOR VALUE



EXPECTED REVENUE GENERATED BY BRITISH WOMEN'S SPORTS BY 2030



AVERAGE ANNUAL VALUE OF EACH PARTNERSHIP LINKED TO THE 2023 WOMEN'S WORLD CUP

POTENTIAL ANNUAL PAY **INCREASE FOR TOP MATILDAS** PLAYERS FROM A NEW DEAL WITH FOOTBALL AUSTRALIA

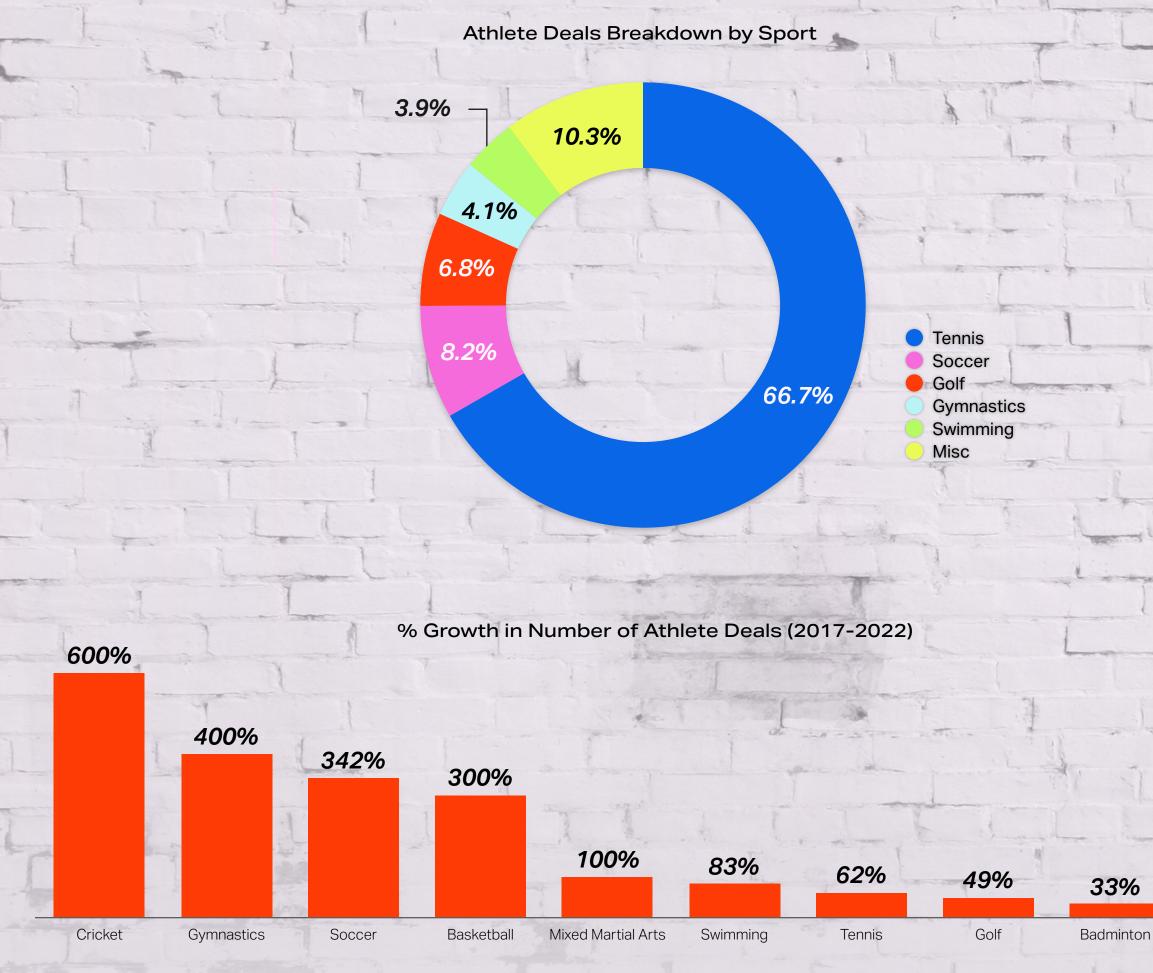






THE VALUE OF FEMALE ATHLETES

Not only do tennis players dominate in endorsement values, but the overall sport generates the most deals for female athletes (67%). Individual sports continue to beat out team sports, accounting for 89% of female athlete deals.



Source: GlobalData; SponsorUnited

"I THINK THE MAIN THING TO AVOID WHEN IT COMES TO PARTNERING WITH ATHLETES IS PUTTING US IN ONE CATEGORY. WE ARE SO MULTIDIMENSIONAL AS FAR AS OUR BACKGROUND, UPBRINGING, SPORT, APPEARANCE AND PERSONALITY, BUT AUDIENCES WILL ALWAYS BE ABLE TO CONNECT WHEN YOU ALLOW ATHLETES TO EXPRESS WHO THEY ARE."

-IZZY HARRISON

on Athletics



NI S NORKING FOR FEMALE ATHETES

While NIL was once thought to inevitably hurt collegiate sports, female athletes are flourishing in the NIL market. Women athletes' social engagement rates are surpassing male athletes, indicating that the NIL power of female athletes is still growing.



SOFTBALL **TOTAL ENGAGEMENT%**



BASEBALL **TOTAL ENGAGEMENT%**



WOMEN'S BASKETBALL **TOTAL ENGAGEMENT%**



WOMEN'S SOCCER **TOTAL ENGAGEMENT%**



MEN'S SOCCER TOTAL ENGAGEMENT%



WOMEN'S GOLF **TOTAL ENGAGEMENT%**

MOST ACTIVE SPORTS

By deal count*

- FOOTBALL
- MEN'S BASKETBALL 2.
- WOMEN'S BASKETBALL З.
- SOFTBALL 4.
- 5. BASEBALL

- WOMEN'S GYMNASTICS
- 7. TRACK & FIELD
- 8. HIGH SCHOOL ATHLETES
- WOMEN'S VOLLEYBALL
- 10. WOMEN'S SOCCER

*Based on over 2,000 deals in 2021/22 in the SponsorUnited database Sources: Blinkfire, ESPN, Nielsen, MVP, SponsorUnited

MEN'S BASKETBALL **TOTAL ENGAGEMENT%**

48.2%

MEN'S GOLF TOTAL ENGAGEMENT%

TOP CATEGORIES By deal count*

FEMALE SPORTS

- **APPAREL & ACCESSORIES**
- **CONSUMER PRODUCTS** 2.
- TECHNOLOGY 3.
- RETAIL 4.
- **BEVERAGE NON-ALCOHOLIC** 5.
- QSR 6.
- FOOD PRODUCTS 7.
- **FINANCIAL** 8.
- LEISURE & RECREATION 9.
- **10. AUTO**

TYPICALLY A MALE ORIENTED CATEGORY, AUTO CRACKS THE TOP 10 FOR FEMALE ATHLETE NIL DEALS BUT NOT FOR MALE ATHLETES

MALE SPORTS

- **APPAREL & ACCESSORIES**
- **BEVERAGE NON-ALCOHOLIC** 2.
- RETAIL 3.
- QSR 4.
- LEISURE & RECREATION 5.
- **TECHNOLOGY** 6.
- FOOD PRODUCTS 7.
- **FINANCIAL** 8.
- HOTEL, RESTAURANT, LEISURE 9.
- 10. CONSUMER PRODUCTS



THE QUEENS OF THE NIL



HIGHEST RANKED WOMAN ON ON3'S NIL RANKING (BEHIND ONLY BRONNY JAMES & SHEDEUR SANDERS)





FOLLOWERS ON SOCIAL

THE LIVVY FUND:

- Supporting LSU female athletes
- Educate female athletes on marketing partnerships
- Fund will place emphasis on equitable access to deals & funds



"WITH THE MAJORITY OF NIL COLLECTIVE PAYOUTS GOING TO MALE SPORTS NATIONWIDE, IT'S VITAL FOR OUR FAN BASE AND **BUSINESSES TO HELP US** GROW OPPORTUNITIES FOR LSU FEMALE ATHLETES," **BAYOU TRADITIONS** FOUNDER CARLOS SPAHT SAID

ANGEL REESE

SECOND HIGHEST RANKED WOMAN ON ON3'S NIL RANKING (OVERALL RANK #7)





FOLLOWERS ON SOCIAL

NIL FOR GOOD:

- Angel C Reese Foundation:
- Empowering women through sports, education and financial literacy
- Alma Mater Tuition Donation
- Donated an entire year's tuition for her high school's women's basketball team
- Back to School Giveback Block Party
- Block party at her alma mater
- Gave away school supplies, backpacks, food & person hygiene items



RANKED #4 FOR WOMEN'S NIL ACCORDING TO ON3



FOLLOWERS **ON SOCIAL**

IOWA

IMPACT OFF THE COURT:

Coralville Community Food Pantry

- One of her largest deals that she doesn't get paid for
- Raised over \$22K

"I WANT MY LEGACY TO BE THE IMPACT THAT I CAN HAVE ON YOUNG KIDS AND THE PEOPLE IN THE STATE OF IOWA" -CAITLIN CLARK

PAIGE BUCKERS

MISSED THE ENTIRE 2022-2023 SEASON BUT THAT HASN'T SLOWED HER NIL MOMENTUM





NIL VALUATION ACCORDING TO ON3

ON SOCIAL

NOTABLE DEALS DURING HER INJURY:

- Ibotta
- Nike
- GoArmy
- Leaf Trading Cards

ALWAYS GIVING BACK:

- Husky Harvest Food Pantry:
- Chegg & Paige teamed up to donate \$50k to the UConn community food bank
- Partnered with Dunkin' to contribute \$15k to the food pantry







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WOMEN IN SPORTS · ENDER



CASE STUDY: ALLY 50/50 PLEDGE

Ally announced in 2022 a commitment to reach equal media spend across men's & women's sports within 5 years. Here's just a few ways they've acted on that pledge:



ATTENDANCE

Features:

- \$150,000 NIL Fund set up by **Charlotte Sports Foundation**
- Gifting Suites for players the night before

AND SO MANY MORE



Sources: Meltwater, 11/7/2022-11/7/2023; TW, FB, IG









EARNED MEDIA REACH

Features:

- Increased media spend with CBS to move the 2022 NWSL Championship to prime time
- Jersey sleeve patch for every team
- Player Impact Focus Program portion of the sponsorship fees will go directly to NWSL players

Roster:

- Ali Krieger
- Ashlyn Harris
- Deja Kelly
- Jess Long
- Julie Foudy
- Kasey Choma

Merritt Mathias

TOTAL SOCIAL MEDIA FOLLOWING

- Michelle Cooper
- Nneka Ogwumike
- Sophia Chang
- Sophia Smith















CASE STUDY: ARSENAL AND STELLA MCCARTNEY

A first in women's soccer in the UK, Arsenal, adidas and Stella McCartney collaborated for the first ever individual women's kit launch ahead of the 2023/24 WSL season.

The eight-piece collection launched on Arsenal's shop sold out shortly after the drop across both men's and women's fits.



EARNED MEDIA REACH IN WEEK OF LAUNCH





CASE STUDY: VITALITY

According to Women In Sport, only 1 in 5 women (20%) have ever participated in grassroots sports compared to almost half of men (46%).

Investing in partnerships that encourage people to be active is at the heart of Vitality's sponsorship strategy.

For Vitality, this includes a focus on building women's sports from grassroots to top-flight teams and events.

Beyond their professional level partnerships, Vitality partners with running communities such as This Mum Runs, community-based initiatives with Back to Netball and Back to Hockey, as well as partnering with Women in Sport, whose purpose is to give every woman and girl the opportunity to take part in sport and inspire her to do so.





ECB



POR





THIS MUM RUNS



ENERGING GATEGORY: PERSONAL

Women's sports have historically stayed away from traditionally "female-focused" categories like skincare, haircare, and makeup. 2023 has changed that trend, however, with over a dozen leagues and teams signing new personal care sponsorships.

> "AS A BRAND THAT'S REALLY LOOKING TO SERVE THE UNDERSERVED, I FOUND IT VERY COMPELLING FOR US TO REALLY PARTNER WITH A LEAGUE THAT QUITE FRANKLY HAS BEEN UNDERSERVED."

-OMAR GOFF, PRESIDENT OF MIELLE JULY 2023

MIELLE WNBA

THE WNBA SIGNED MIELLE AS THEIR "OFFICIAL TEXTURED HAIR CARE PARTNER" OF THE LEAGUE

THE LOS ANGELES SPARKS SIGNED URBAN DECAY AS THEIR "OFFICIAL BEAUTY PARTNER"

URBANDECA'







MIELLE ALSO SIGNED A PARTNERSHIP WITH HOWARD UNIVERSITY'S SWIMMING AND DIVING TEAM



NYX LAUNCHED ITS FIRST EVER SPORTS SPONSORSHIP WITH THE NEW YORK LIBERTY AS THEIR "OFFICIAL MAKEUP PARTNER"





FC BARCELONA'S WOMEN'S SOCCER AND BASKETBALL TEAMS SIGNED RILASTIL TO BE THEIR "OFFICIAL SKIN CARE & SUN **PROTECTION PARTNER**"

ENDEAVOR ANALYTICS 39

EMERGING CATEGORY: PERSONAL CARE

Female athletes have also been leaning into the personal care category, with several major deals being signed in the past couple of years.



CLINIQUE

IN DECEMBER 2022, CLINIQUE PARTNERED WITH ENGLAND RUGBY UNION STAR HOLLY AITCHISON AND LAUNCHED THE #GAMEFACE CAMPAIGN Glossier.

IN AUGUST 2023, GLOSSIER PARTNERED WITH CHICAGO SKY'S IZZY HARRISON TO LAUNCH HER OWN SET OF MAKEUP PRODUCTS

400VC-3

"NOWADAYS, GIRLS DO THE FULL GLAM TO RACE, AND I LOVE IT BECAUSE IT FEELS LIKE YOU'RE GETTING READY FOR WAR AND PUTTING ON YOUR WAR PAINT." -SYDNEY MCLAUGHLIN-LEVRONE

Neutrogena

IN SEPTEMBER 2023, OLYMPIC **RUNNER SYDNEY-MCLAUGHLIN-**LOVRONE BECAME NEUTROGENA'S FIRST ATHLETE AMBASSADOR

Neutrogena

Ultra Sheer body mist

70

HYDRO

BOOS

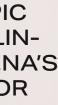
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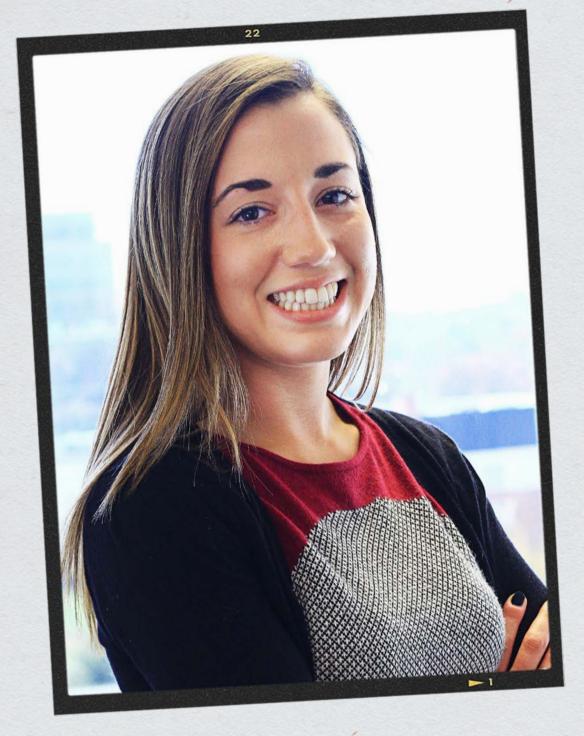
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REBECCA HENDEL VICE PRESIDENT, VALUATION, ENDEAVOR ANALYTICS

Rebecca Hendel has over 10+ years of sponsorship valuation experience. Since joining the Endeavor Analytics Sponsorship Valuation team in 2018, she has spearheaded a wide variety of valuation work on the brand and property side, including ongoing work for MLB, Ford, Marriott, and DP World, as well as naming rights and jersey patch analyses for Inter Miami, St. Louis Cardinals, Brooklyn Nets, Angel City FC, and Inter Milan. She has also worked extensively on international projects, such as with Etihad, AELTC, HSBC Women's World Championship, The Pyramids at Giza, and MetLife Dome.

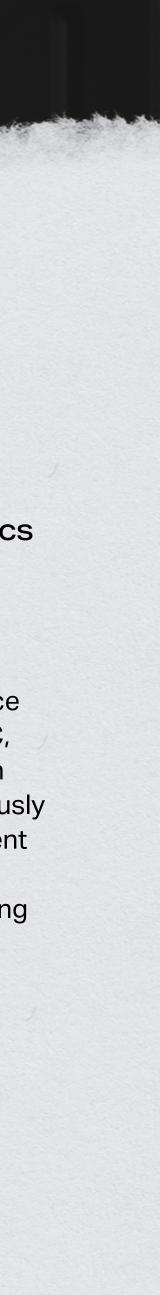




AMY PAINTER SENIOR ANALYST, ENDEAVOR ANALYTICS

Amy Painter has 6 years of experience working in insights and analytics, both brand and property side. She joined Endeavor Analytics in 2022 and has since worked across projects including AELTC, SailGP, Marriott, PUMA and EA Sports. In her time at Endeavor, Amy has continuously championed equality through involvement in Employee Resource Groups such as Women of Endeavor, as well as supporting other diversity and inclusion initiatives.

FOR MORE INFORMATION, PLEASE EMAIL RHENDEL@ENDEAVORCO.COM



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*** USA



JANUARY 2024

