



EUROPEAN FOOTBALL

NATIONAL TEAMS,
TOURNAMENTS, SPONSORS
AND PLAYERS UNDER
THE MICROSCOPE

EUROPEAN FOOTBALL 2016

Football is overwhelmingly the dominant sport across Europe, capturing fan interest and vast audiences virtually on a year round basis.

The continent's major clubs and leagues are some of the biggest and most recognised sports properties in the world; indeed they have become some of the world's biggest brands full stop. Much of what is great about European football is the fact that the club game forms the base with its intense tribalism and storied histories. But several times during each season and then one summer in every two club loyalties are put to one side, to be replaced by national pride and a new level of passion.

FIFA World Cups and, as this summer, UEFA European Championships have become landmark events in their own right – staging them requires significant infrastructure, often including new and improved stadiums, and major investments in security and logistics – and guarantee huge coverage inside and outside Europe. Success or failure of a national team in a competition like UEFA Euro 2016 can impact upon the national morale and potentially generate an economic uptick.

With fan interest of competing countries at '11 out of 10', significant media coverage and tapping into a wave of national fervour, these tournaments have inevitably held a magnetic attraction for sponsors – as partners of the event itself, of one of the competing teams and their national football association, or even as an advertiser or sponsor of broadcast coverage.

This report considers the national team landscape in European football, the opportunities for sponsors and players at UEFA Euro 2016 and beyond and the changing media habits of football fans across a continent where football continues to stand out from the crowd.



Paul Smith
Founder and CEO,
Repucom

CONTENTS

- 04 | **TOURNAMENT**
France prepares for its biggest sporting event since the 1998 FIFA World Cup.
- 08 | **SPONSORS**
Opportunity knocks in an expanded European Championships.
- 12 | **PLAYERS**
The impact of winning, breakout performers and established stars.

DOMINATING THE SPORTING LANDSCAPE

In terms of profile, coverage, interest and tribalism, football dominates the European sports landscape. At club level, the continent's biggest names are some of the world's biggest brands and have transformed themselves from mere sports team into major retailers, broadcasters, content producers and distributors, sales houses, digital activation agencies, hospitality providers and community hubs. They are some of the biggest brands on the planet, many playing in leagues that have become huge global brands in their own right.

While there may be fewer fixtures on the international football calendar, national federations and associations responsible for national teams find themselves playing many of the same roles – as well as developing and funding the grassroots programmes that are the lifeblood of the sport's participation base. The clubs may wield great influence but each season is peppered with protected international matchdays, either friendly games or major tournament qualifiers, and the major tournaments every two years – the FIFA World Cup and, as this season, the European Championships – retain a huge pres-

tige, generating the greatest interest and inspiring feelings of national pride and enthusiasm.

For this year's European Championships, television schedules across the continent and beyond will be cleared. Brands – as partners of federations, individual players or the tournament itself – will fight for cut-through and engagement as a result of their sponsorship activations and look to optimise and maximise their returns on investment. An expanded tournament format in France for Euro 2016 offers the opportunity for new players, teams and brands to make a mark across more platforms than ever before this summer. For the 24 teams and their associated national federations, a potentially huge opportunity beckons. The continent – and the wider world – will be watching.

The Euro 2016 qualifiers

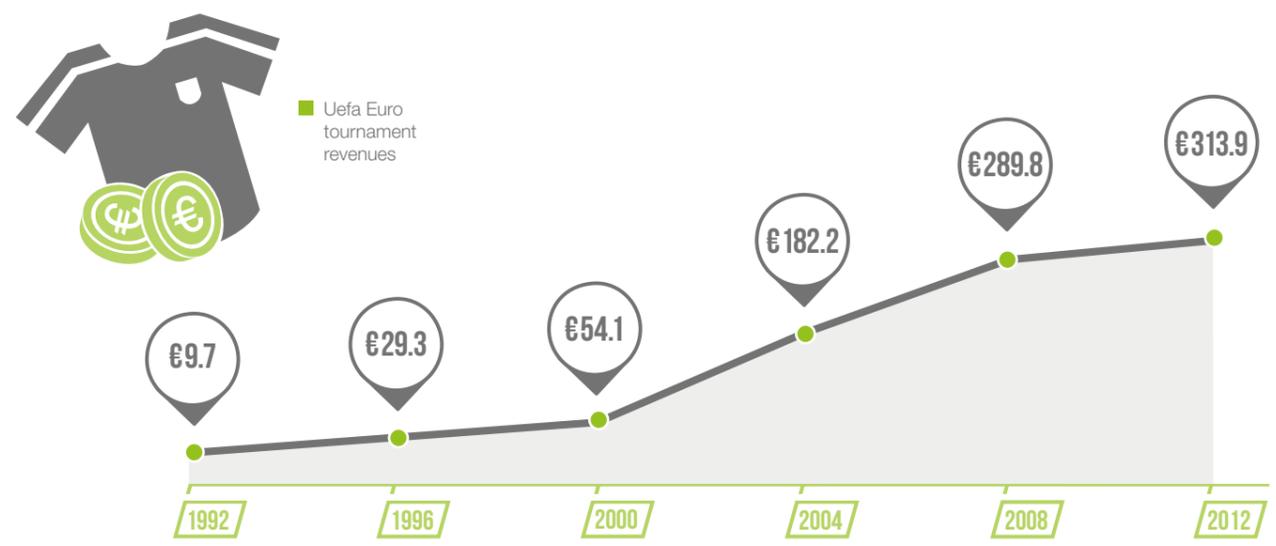


EURO 2016: BIGGER THAN EVER

UEFA Euro 2016 is the 15th edition of the European Championships. France is staging the competition for the third time, after hosting the first tournament in 1960 and the 1984 edition. An expanded line up of 24 teams, eight more than participated in the tournaments between 1996 and 2012, means some 51 matches, 20 more than in 2012, will be played. UEFA, European football's governing body, anticipates an audience of 2.5 million fans in stadiums, 1.5 million foreign visitors travelling to France and live television coverage in 230 territories.

Games will be played in 10 stadiums, many new or renovated for the tournament, across the country, with the final at Paris' Stade de France, the stadium built for the 1998 FIFA World Cup. The other host cities are Marseille, Lyon, Lille, Bordeaux, Saint-Etienne, Nice, Lens and Toulouse. Four stadiums are new for the tournament, with five others upgraded for 2016.

Uefa European Championship sponsorship revenues (1992 – 2012)



Source: UEFA financial reports; UEFA.com

TOURNAMENT

The 15th European Championships will be the biggest yet, with 24 teams playing 51 games in 10 stadiums across France.

Nice's Allianz Riviera Stadium, opened in 2013, is one of 10 venues for UEFA Euro 2016.

Estimated Euro 2016 revenues

- €1 BILLION**
TV RIGHTS
- €400 MILLION**
SPONSORSHIP
- €500 MILLION**
TICKETING AND HOSPITALITY

Source: UEFA.com

Number of employees in local organising committee

- END OF 2013: 17
- END OF 2014: 65
- END OF 2015: 145
- MARCH 2015: 226
- JUNE 2016: 650 + 6,500 VOLUNTEERS

Source: UEFA.com

CASE STUDY

PLAYING HOSTS: FEDERATION FRANÇAISE DE FOOTBALL

Interview ► While UEFA is in charge of the organisation of Euro 2016, a major football tournament on French soil opens up a major opportunity for the host national federation. **François Vasseur**, Marketing Director at the Federation Française de Football, explains how the organisation intends to make the most of this summer.

How are the FFF's preparations for Euro 2016 going?

François Vasseur ► I think we are ready to deliver a huge event and a great tournament for the French national team and for all of French football. When the event will take place in France, the whole of France will be involved. We have already done significant work on grassroots football and we have helped the grassroots clubs to develop, using the perspective of Euro 2016. The FFF helped them to construct new pitches, new programmes, new lighting systems to be ready to welcome some new players after the Euro. Today we have more than two million players registered in France and due to the preparation of the Euro 2016 we are waiting for a strong increase. The FFF has also done a lot of work to better understand our fans. Today, we have more than 120,000 members in our official supporters club. We created this club just before the last FIFA World Cup in Brazil; the success has been huge. Even when the French team won the World Cup in 1998, we've never had more than 12,000 supporters – now it's much bigger.

How are you able to use all that information, from a commercial standpoint?

F.V. ► Data is key for all our marketing and sponsorship programmes. The sponsorship world is changing. We used to propose visibility to our sponsors on shirts, on advertising boards, on the pitch. Now, we have developed our CRM programme significantly. We have lots of data and more and more customer knowledge. The FFF is now a powerful media. We have big communities, more than five million fans on Facebook, two millions on Twitter, we are strong on Instagram, Snapchat and YouTube. Our audiences are big, and we are working on more and more content programmes. For our sponsors it's a new way to create value. Partners such as Repucom are helping us to develop the measurement and valuation of all the digital visibility for our sponsors, and to evaluate digital assets – it's really a new kind of sponsorship.

What kind of conversations have you been having with partners, in the build-up to the tournament?

F.V. ► For the first time, we developed a marketing plan together, it's a movement called '#Proud to be blue'. It's a big marketing movement and programme that we constructed with all our sponsors. The FFF and partners communications have the same branding, although of course all our sponsors have their own objectives. We are ready to involve and motivate the whole French population!

For our sponsors, the main issues now are business and image due to the French national team. There are a lot of opportunities around digital

and that will be the most visible part of our programme. We have discussed what we can all do together to maximise revenues and develop the engagement of our fans, with social media for example.

How important is it that the FFF's partners build in a grassroots, participatory element into their activations?

F.V. ► Local activation and social activation is vital: all our sponsors are doing that. The big difference between the sponsorship of a professional team like PSG or Marseille and the sponsorship of the French federation is that you have a really big local presence, all across the country. Partners want to give meaning to what they do and they help the French grassroots clubs. In France, the clubs are key for social activity, for the kids after school for example. They help a lot of kids who are maybe not successful at school or have a challenging family environment; it's really important. We have 17,000 clubs in France and more than two million players. Perhaps 70 per cent of them are kids. Socially, it's really significant and important to have those soccer clubs for development.

How important is a successful French national team?

F.V. ► It's so important. Sometimes it's frustrating to work in the sports business, because sport is uncertain. But that makes it exciting, too. We know that the most important thing is to win, with good spirit and good behaviour. We hope the fans will dream and if the results are good, people will be more involved and it will be good for our partners, our sponsors, TV and everything.

What, if any, impact do you expect the security issues around the tournament to have on the way your partners activate these partnerships?

F.V. ► It's not our decision and we have of course to follow the government measures and decisions. The main issue is really the security of the event. Some events and marketing operations have been cancelled or reduced by sponsors or by us. We will not be able to do everything we had planned in the host cities. But we found others solutions, and UEFA did a great work to propose other disposal in



“DATA IS KEY FOR ALL OUR MARKETING AND SPONSORSHIP PROGRAMMES.”

the fans zones, with digital, through TV and at the stadiums it will be really great. I think – I hope – it will be ok, but for sure it's not the easiest environment to organise a tournament like this.

“WE HAVE DISCUSSED WHAT WE CAN ALL DO TOGETHER TO MAXIMISE REVENUES AND DEVELOP THE ENGAGEMENT OF OUR FANS.”

What do you expect the major legacies of UEFA Euro 2016 to be?

F.V. ► Legacy is hugely important when you organise big competitions. We want to ensure a legacy for all of French football. We hope that we will have a great increase of young players – we will try to welcome all of them, although in our clubs there are always a large number of kids who want to play football. It will be important to recruit new football fans

The image issue is also important. It's sometimes hard for professional football, for the French national team, for the clubs' image because football players sometimes don't have the best reputation, for a variety of reasons. We hope that the relationship between the players, the team, and all the French fans will be successful. We hope the French people will love this team more and more.

What impact do you expect the raft of new and refurbished stadiums across France to have?

F.V. ► The French federation is not in charge of that, the clubs are professional organisations, but I hope the new stadiums will allow them to develop revenues. We want French football to have a better championship, with better players and lots of fans. It's great to have these kind of stadiums but the competition between the European leagues is really high – in England, for example, there are huge revenues, so it is hard to keep players in France. But we hope this will be a virtuous circle after this fabulous event.

What will your own role be during the tournament?

F.V. ► In Brazil for the World Cup, we had a lot of work – and I expect the same! We are not organising the competition – that's UEFA – so we will follow the team and we will work a lot on social media. I will be following the team, really stressed during the French team matches – but it will be fun, I hope!



Super Victor, UEFA Euro 2016's official mascot.

SPONSORS

The European Championships represent a golden opportunity for brands to tap into the passion and pride of national team competition.

TAILORED ACTIVATION TO ACHIEVE CUT-THROUGH

Unsurprisingly, national football federations and associations tend to strike deals with domestic partners keen to tap into the pride and passion associated with a team representing a country. In Spain, for example, the reigning European champions have major sponsorships in place with Spanish firms Cruzcampo, Iberdrola and Movistar; world champions Germany have a longstanding relationship with Mercedes-Benz, plus agreements with Bitburger, Commerzbank and T-Mobile. At the other end of the spectrum, the five debutant teams in Euro 2016 all have partnerships with local brands – from Tennant's Lager in the case of the Northern Ireland national team, to the Icelandic FA's deal with Icelandair.

With more teams and more sponsors, either utilising official rights or looking to align themselves with the tournament in other ways, achieving cut-through in a cluttered market and a rapidly changing media environment will likely be more critical than ever. Tailoring activations and mapping a way through an evolving global and local fan landscape is essential. In 2014, Repucom developed Fan DNA™, a pioneering behavioural approach that identifies fans across the world

who will respond strongly to different sorts of sponsorship activation; in simple terms, providing the missing link between what fans say and what they do.

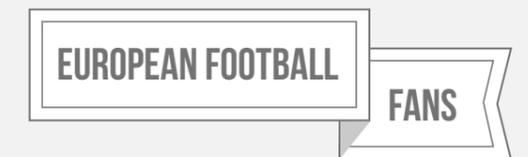
Repucom identified seven distinct fan types, each with their own characteristics. The highest proportion of European football fans fall into the 'Connection Fan' group – 'Connection Fans' principal underlying motivation for being a fan is the opportunity to enjoy sport with friends and family; a tournament stirring national passions like a European Championships is ideal in this respect. 'Connection Fans' also spend the most amount of money on sports-related goods and tend to be responsible for purchase-making decisions. They respond well to activations promoting or celebrating family, community and causes, while a player wearing a particular brand acts as a personal recommendation.

How football fans in Europe's major markets consume sports info

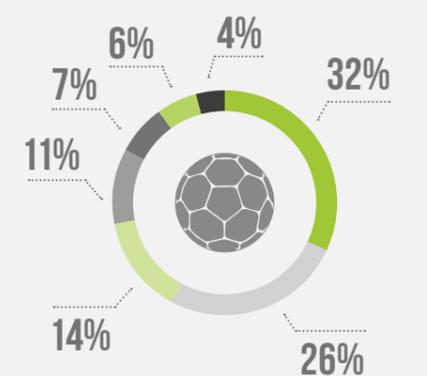


Source: Repucom Sports DNA (November 2015)

Fan DNA™ Segments



- Trend Positive
- Armchair Fan
- Connection Fan
- Busy
- Game Expert
- Disengaged
- Cynic



Source: Repucom SDNA May 2015, Europe = average across UK, DE, IT, ES, FR

French players celebrate scoring a goal in front of a raucous crowd in Paris.

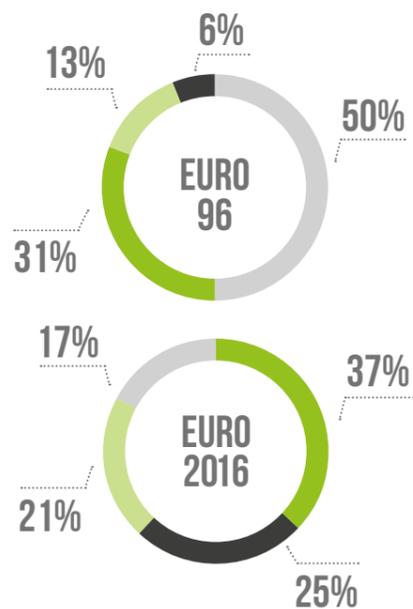
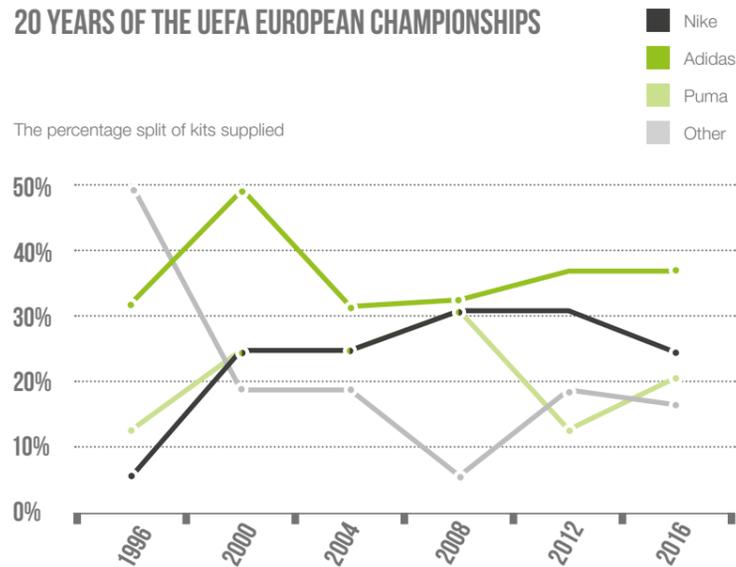
ADIDAS V NIKE: A FIERCELY CONTESTED COMMERCIAL BATTLE

Adidas has supplied kits to the winners of the last five European Championships and holds a central contract with UEFA for the tournament. It also has the lion's share of teams in this year's competition under contract – 37 per cent of the total, compared to Nike which is supplying a quarter of the teams. A comparison with the same tournament 20 years ago suggests that the biggest brands in the sector are getting bigger: whereas half the teams were kitted out by brands other than Nike, Adidas and Puma at Euro 1996, Euro 2016 will see

17% of teams wearing kits made by other manufacturers. The battleground between Nike and Adidas is online and data from Facebook, captured between January-April 2016, suggests that while Nike has significantly more followers than its rival, it is Adidas' video-heavy content strategy which is paying off with nearly nine times the engagement rates.

The sportswear giants – head-to-head

THE KITS – LOOKING BACK AT THE LAST 20 YEARS OF THE UEFA EUROPEAN CHAMPIONSHIPS



HOW NIKE AND ADIDAS KITTED-OUT THE HOSTS AND WINNERS OF THE UEFA EUROPEAN CHAMPIONSHIPS 1996 – 2016

HOSTS KITTED-OUT BY NIKE

- FRANCE ▶ 2016
- POLAND ▶ 2012
- PORTUGAL ▶ 2004
- BELGIUM ▶ 2000
- NETHERLANDS ▶ 2000



HOSTS KITTED-OUT BY ADIDAS

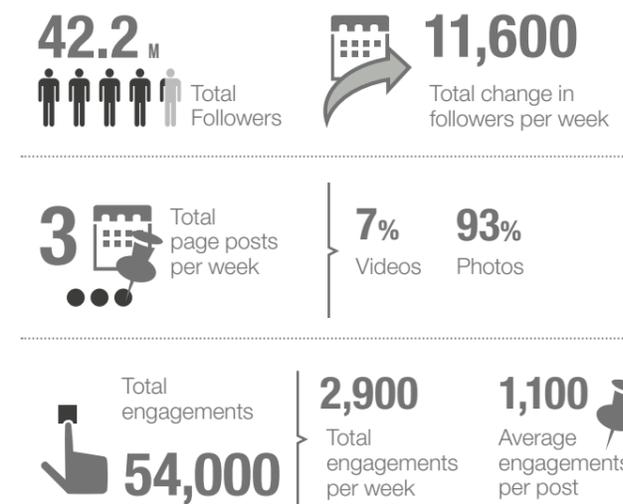
- UKRAINE ▶ 2012



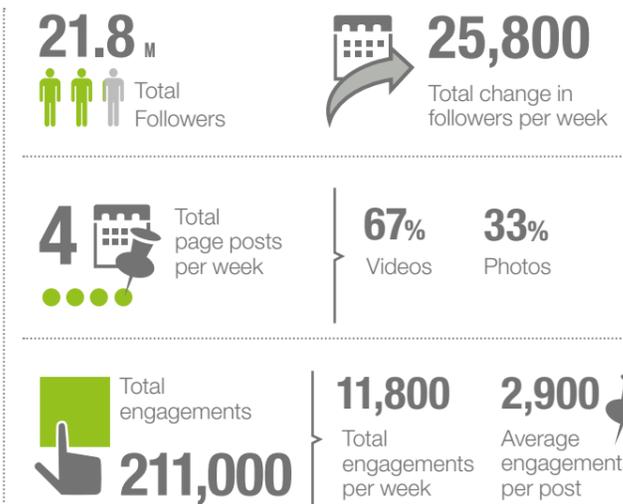
Adidas and Nike are preparing for another major tournament battle.

SOCIAL MEDIA – FACEBOOK (2016 SO FAR)

f / NIKEFOOTBALL



f / ADIDASFOOTBALL



Source: Repucom Digital Services / Source Repucom Market Intelligence (Data taken from 1 Jan 2016 – 25 April 2016)

Paul Pogba, of Juventus and France, is set to be one of the stars of the tournament.



PLAYERS

552 players will participate as squad members in Euro 2016. From established stars to breakout youngsters, surprise performances to memorable moments, the tournament promises to create a host of new commercial options for brands.

MEASURING CELEBRITY

Celebrity Davie Brown Index (DBI) is a tool which can measure the public's perceptions of over 7,000 personalities across 15 markets around the world, (including 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 can look at specific demographics, including age groups and income groups, to give a clear identification of how audiences consider a personality or sportsperson. 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 provide an overview of that person's marketability. The individual attributes also provide telling strengths and weaknesses of how the personality is seen in different countries around the world.

The impact of winning – and the commercial window to maximise it

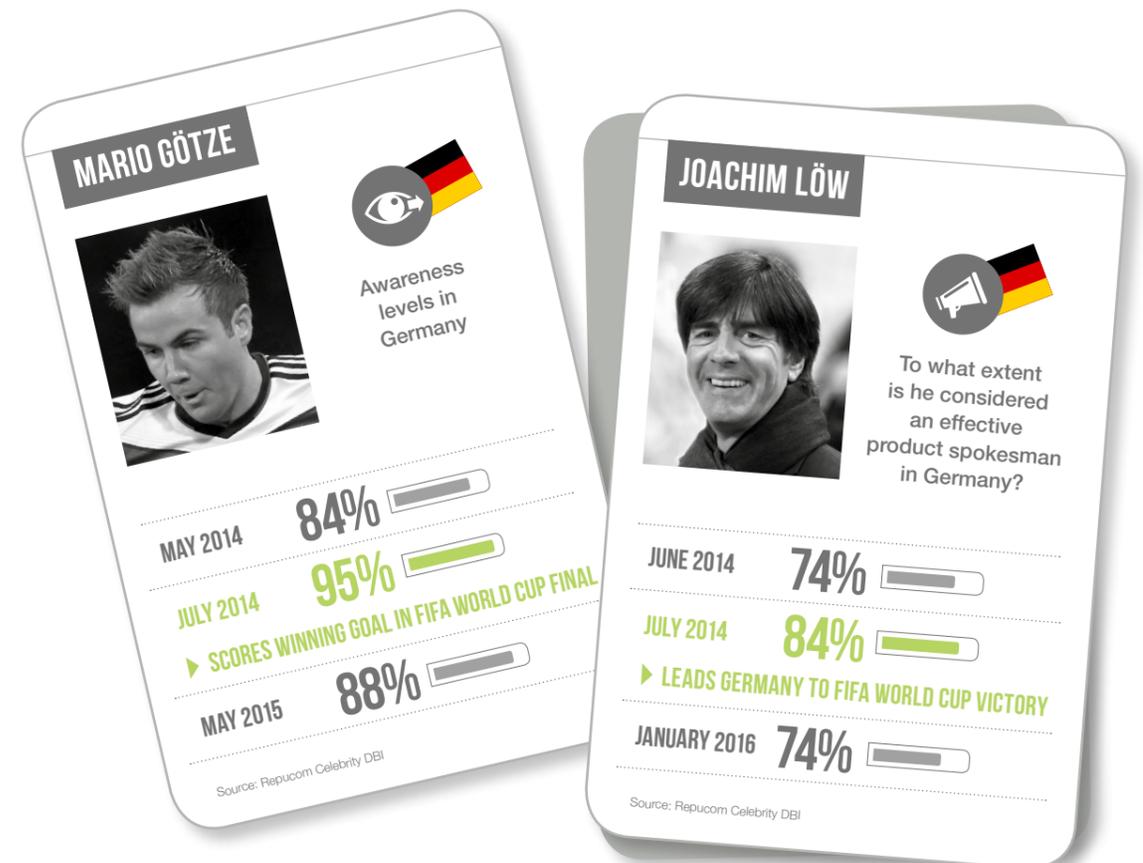
GERMANY AND THE 2014 FIFA WORLD CUP

When Mario Götze scored what turned out to be the winning goal in Germany's 1-0 extra-time victory over Argentina in the 2014 FIFA World Cup final, it propelled the then- 21 year old to new commercial heights. The Bayern Munich player, whose personal corporate partners include Audi, Nike and Beats, was already well-recognised in his homeland, but his starring role in the world football's biggest game saw his awareness in Germany increase from 84% as the tournament began in May 2014 to 95% on the day after the final in July, according to Repucom's Celebrity DBI tool.

A year later, however, his awareness level in Germany had dipped slightly, to 88%, underlining that both a commercial window exists for brands to take advantage of a players' success, fame and influence as an

endorser, and the importance of major national team tournaments in creating a spike in interest and profile.

Similarly, of those in Germany who recognised German national team coach Joachim Löw immediately before the 2014 FIFA World Cup, 74% considered him an effective product spokesman, with the potential to impact brand consideration and purchase intent. (Löw is a long-time brand ambassador for skin-care product brand Nivea). By the time Germany had lifted the World Cup trophy a few weeks later, that figure had risen to nearly 84%.



Top of the table

CRISTIANO RONALDO: COMMERCIAL POWERHOUSE

At the top of world football, two stars have shone brightest for nearly a decade. Between them, Lionel Messi, of Argentina and FC Barcelona, and Cristiano Ronaldo, of Portugal and Real Madrid, have won the past nine Ballon d'Or awards, the most prestigious individual honour in the game.

With Messi representing Argentina in this summer's Copa Centenario, however, the European stage has been left to Ronaldo. Indeed, in commercial terms Ronaldo dwarfs all other Euro 2016 players. In addition to his multi-million dollar, long-term Nike contract, he has a roster of partners with brands including Pestana Hotel Group, Herbalife, Clear, Sacoor Brothers, Tag Heuer, Pokerstars and XTrade, as well as his own range of CR7-branded underwear, shirts, fragrances and footwear.

The social platform Ronaldo can offer brands is clear: as of mid-May it included access to his 42.4 million followers on Twitter, 59 million Instagram followers and 111.59 million Facebook fans.

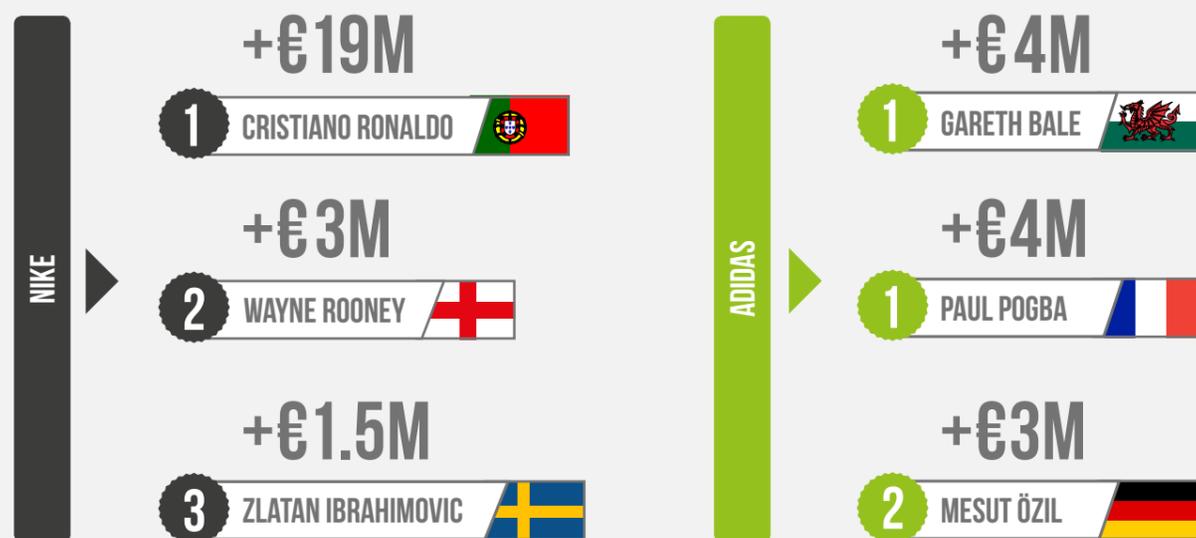
Awareness of the Portuguese player is, of course, enormous across the continent but the



international appeal and potential of European football – at club and international level – is underlined by the proportion of those in non-European territories who recognise the 31 year old. Unsurprisingly, Ronaldo has almost blanket awareness in football-dominated markets such as Brazil and Argentina. According to Celebrity DBI, he is recognised by 82% of the Chinese population, 84% of people in Japan and 78% in India.

Perhaps the most interesting opportunity for further commercial growth lies in the USA. Emphasising the rising interest in football in the United States, driven by the national team's exploits, the growth of Major League Soccer and increasing coverage of European leagues on television, Ronaldo's recognition level in the country rose from 29% to 39% in the year between May 2014 and May 2015, a period which saw him participate in the FIFA World Cup and win the UEFA Champions League with his club.

The biggest personal deals in European football



Source: Repucom Digital Services / Source Repucom Market Intelligence (Data taken from 1 Jan 2016 – 25 April 2016)

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