



NIELSEN SPORTS

# POWER OF ONE

ATHLETES AS ENDORSERS



**LEADERS™**

*Worth Knowing*

nielsen  
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## INTRODUCTION

Sponsorship in sports is a \$60B+ industry globally. Lucrative personal endorsement contracts covering sectors such as sportswear, beverages, automobiles, financial services, technology, electronics companies and fashion have become a significant revenue stream for the world's top athletes. Deals ranging from long-term, fully integrated partnerships to shorter-term, more tactical arrangements around a particular event or achievement.

Four of the world's top 10 highest paid athletes, according to *Forbes*, (Roger Federer, LeBron James, Stephen Curry and Kevin Durant) have higher endorsement income than salary or winnings from their sport. They are all also over 30 years old.

For this special report, in collaboration with Leaders, Nielsen Sports has focused on a younger generation of athletes, using its social valuation scorecard to evaluate the commercial potential of a group competing in a variety of sports around the world, all of whom are under 25.

Nielsen Sports developed the Social Scorecard in 2017 with leading brands invested in sports to help identify opportunities and assess the performance of athletes as endorsers. For individuals as opposed to teams, leagues or events, social media audience and content is the most important asset a brand is acquiring.

Nielsen Sports uses over 30 social and digital data points to create these scorecards and it is an approach that's fully customizable based on brand business and marketing objectives.

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***For brands that are focused on social media-first activation and reaching Generation Z consumers, athletes and celebrities are becoming increasingly attractive parts of sponsorship strategy. Not only can there be more flexibility when planning campaigns versus dealing with leagues and teams, but more importantly, individuals are more influential in changing brand perception and promoting purchases for the majority of younger consumers.***

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**Max Barnett**  
Senior Vice President, Head of Digital  
Nielsen Sports

COVER IMAGE: Kylian Mbappe during the UEFA Nations League A group one match between France and Germany, October 16, 2018, Paris, France. (Photo by Matthias Hangst/Bongarts/Getty Images)

**IN THE FOLLOWING CASE STUDY** Nielsen has weighted the scorecard for a brand that is targeting female consumers, based in the U.S., who are interested in health and fitness. Nielsen Sports works with clients directly to customize weightings and data inputs based on client objectives.



### REACH

takes into account the number of social media followers, momentum/growth of followers during the measurement period, and the quality of the reachable audience



### RELEVANCE

refers to the demographics that are selected for the study including topic affinity, gender affinity, and geography affinity



### RESONANCE

takes into account the engagement rate on the athlete's social media posts, sentiment around the athlete, and number of people talking about them during the given time period

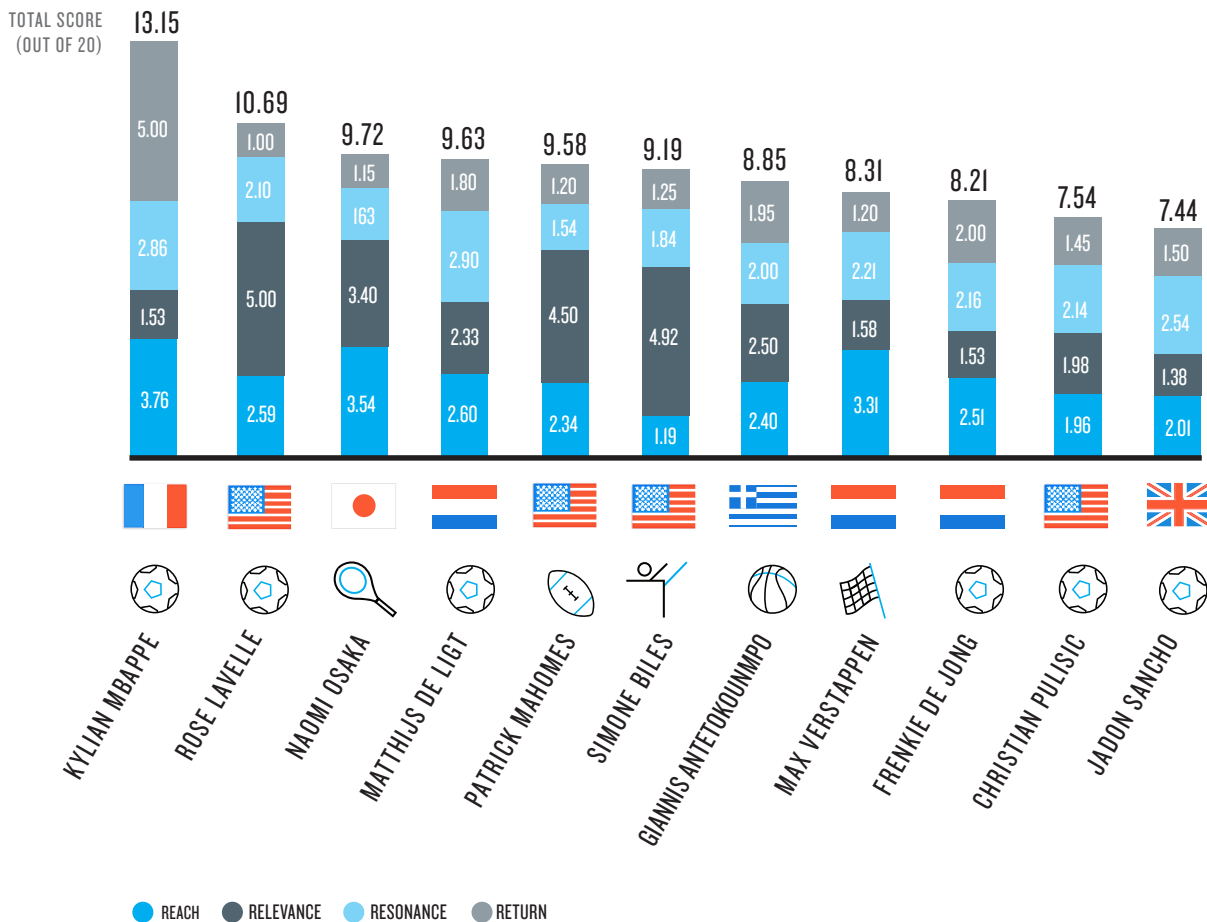


### RETURN

is the value a brand would receive from partnering with an athlete on their social media channels

## NIELSEN SPORTS SOCIAL SCORECARD

Select athletes under 25 (July 1, 2018 - July 1, 2019)



Based on Instagram posts that the athlete made during the measurement time frame

## NIELSEN SPORTS SOCIAL SCORECARD INSIGHTS

French Paris Saint-Germain phenom and 2018 FIFA World Cup winner, Kylian Mbappe, is the most valuable of the 11 globally-known athletes under 25 analyzed in this study, with a final social score of 13.15. He ranks No. 1 across both the 'Reach' and 'Return' metrics.

Another FIFA World Cup winner, Rose Lavelle, comes in an interesting second, with a 10.69 score. She was part of the victorious U.S. women's team in France earlier this year, and her final score in this study is driven heavily by her perfect score in the 'Relevance' category.

Four of the top five athletes in the study—Mbappe and Lavelle plus tennis Grand Slam winner, Naomi Osaka, and Juventus defender, Matthis de Ligt,—have opportunities to appeal to and gather a global social media fan base via international competition with both club and country. By contrast, Kansas City Chiefs quarterback, Patrick Mahomes, plays in a major U.S. league, the NFL, but doesn't have the global recognition of international football (soccer) stars.

The scorecard also shows female athletes Lavelle, Osaka and Biles performing better across affinity metrics, underlining for brands the importance of finding the right ambassador. Selecting the player with the highest follower count doesn't necessarily translate to a good performance with a brand's target market.

**BASED ON THEIR SOCIAL SCORECARD PERFORMANCE**, we can predict the average value per branded content social media post. Mbappe, with his tremendous social media following, generates



**1.2 MILLION**

**in media value per post**

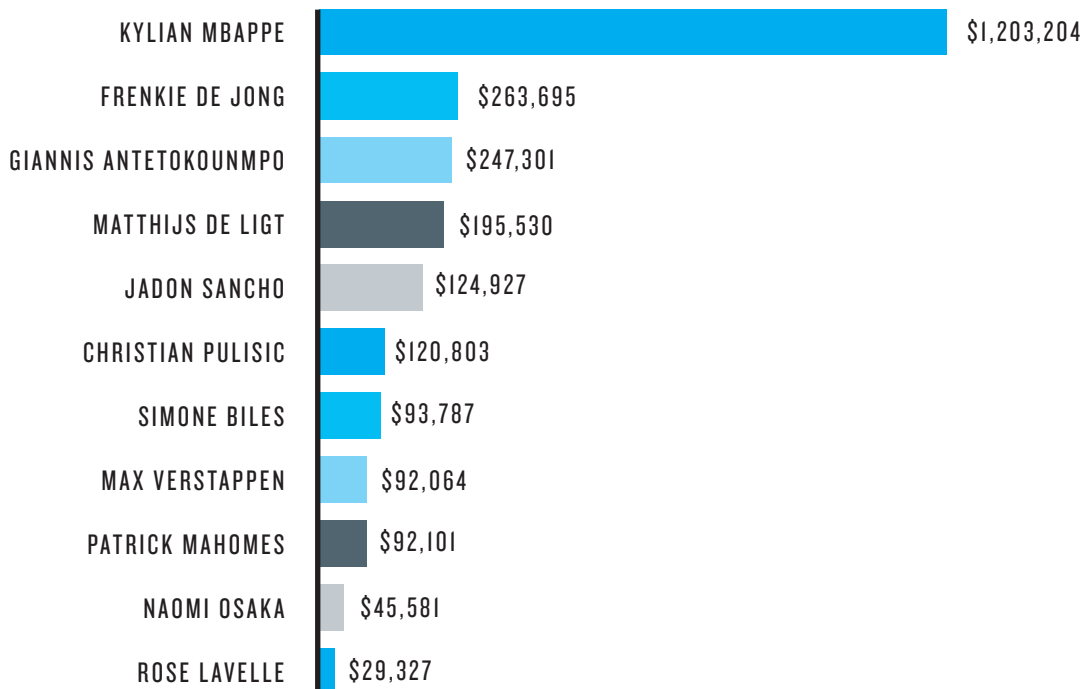
(based on Instagram posts that the athlete made during our measurement time frame)

The global prominence and ability for athletes to dominate a sports news cycle makes a large difference in the exposure received by brands associated with the athletes. For example, soccer stars received a generous boost during the selected monitoring period because of the 2018 Men’s and 2019 Women’s World Cups, as well as their ability to play a year-round season.

Meanwhile, Simone Biles has to wait every four years when the Olympics takes place to make a worldwide impact, and even that is a short one because of the typical length of a gymnast’s career. In contrast, international soccer players like Mbappe, de Jong and de Ligt also have increased opportunities to generate value for partners because of their ability to reach fans of their club and county.

## PREDICTED VALUE FOR SOCIAL MEDIA POSTS WITH BRANDED CONTENT

Based on measurement period July 2018 - July 2019

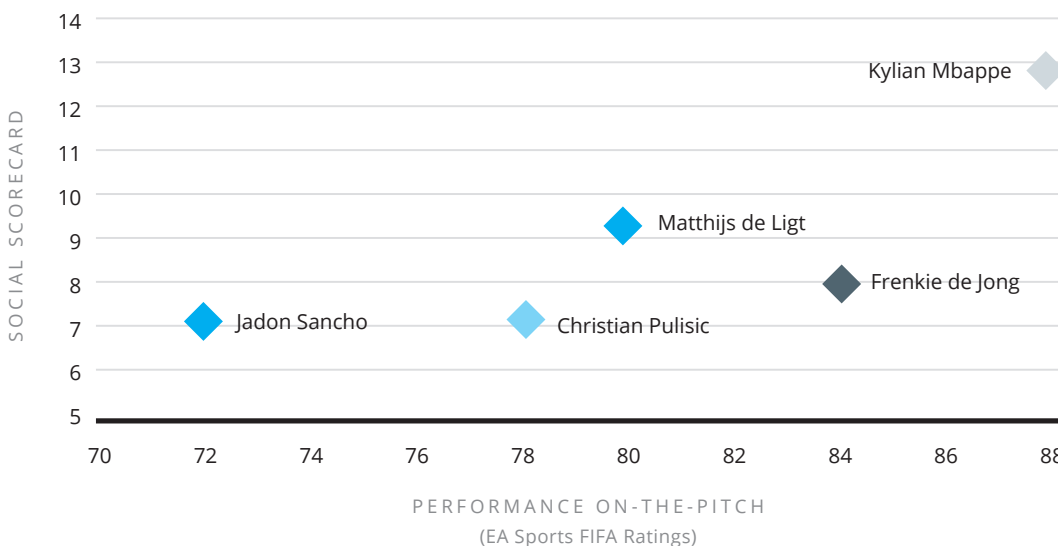




Christian Pulisic during match between Borussia Moenchengladbach and FC Chelsea at Borussia-Park on August 03, 2019, Moenchengladbach, Germany. (Photo by Christof Koepsel/Bongarts/Getty Images)

**WHEN LOOKING AT SEVERAL YOUNG FOOTBALLERS**, we see that Mbappe is in a league of his own—both on-the-pitch and through his social scorecard performance. Mbappe outperforms the average relationship between social score and performance, showing that although he'll be expensive to endorse, he has the overall social attributes to be a very effective partner for brands. Christian Pulisic is a bit of an outlier where his performance has exceeded his social scorecard standing. Note, Pulisic, as an American in the world of global football (soccer), has great potential for endorsement power growth given his arrival in the Premier League.

## SOCIAL SCORECARD AND ON-THE-PITCH PERFORMANCE COMPARISON



# RISING STARS



Kylian Mbappe during the UEFA Champions League match between Manchester United and Paris Saint-Germain February 12, 2019, Manchester, England. (Photo by Michael Regan/Getty Images)

## KYLIAN MBAPPÉ

Age 20

France

**Ligue 1:** Paris Saint-Germain

**FIFA:** France men's national team

**Highest 'Reach' among athletes with nearly 39 million social media followers**

**Endorsements:** Nike, Hublot, Good Gout, Bulk Homme

### CAREER HIGHLIGHTS\*

- Mbappé is one of only two teenagers to have scored in a World Cup final. The other is Pelé.
- He was the leading goalscorer in the 2018/19 Ligue 1. He netted 33 goals in 29 league appearances.
- Mbappé received the Young Player Award at the 2018 World Cup. His international teammate Paul Pogba had won the award four years earlier.

## MATTHIJS DE LIGT

Age 20

Netherlands

**Serie A:** Juventus

**FIFA:** Netherlands men's national team

**Highest 'Resonance' among athletes tracked**

**Endorsements:** Adidas

### CAREER HIGHLIGHTS\*

- De Ligt became the youngest person to play for Netherlands in a competitive match when he made his senior international debut in a 2-0 World Cup qualifying defeat against Bulgaria in March 2017 at age 17 years and 225 days.
- He scored 25 minutes into his competitive debut for Ajax, a 5-0 home win versus Willem II in the Dutch Cup first round in September 2016.
- De Ligt became the youngest person to start a major European final when he played in Ajax's 2-0 defeat against Manchester United in the 2016/17 Europa League final, aged 17 years and 285 days.



Matthijs de Ligt during the UEFA Nations League match between the Netherlands and England. June 06, 2019, Guimaraes, Portugal. (Photo by Jan Kruger/Getty Images)



**PATRICK MAHOMES II**

Age 23  
U.S.

**National Football League:** Kansas City Chiefs

**Endorsements:** Adidas, Oakley, Hunt’s Ketchup, Head & Shoulders

**CAREER HIGHLIGHTS\***

- Patrick Mahomes was named 2018 NFL MVP, becoming the youngest winner of the award since Dan Marino in 1984.
- In 2018, Mahomes became only the third quarterback to reach 50 passing touchdowns in a single NFL season, after Tom Brady and Peyton Manning.

Patrick Mahomes of the Kansas City Chiefs during the AFC Championship Game. January 20, 2019, Kansas City, Missouri. (Photo by Ronald Martinez/Getty Images)

**ROSE LAVELLE**

Age 24  
U.S.

**National Women’s Soccer League:** Washington Spirit

**FIFA:** U.S. Women’s National Team

**Highest ‘Relevance’ among athletes tracked**

**Endorsements:** New Balance

**CAREER HIGHLIGHTS\***

- Rose Lavelle scored the second U.S. goal in a 2-0 win against Netherlands in the 2019 World Cup final in Lyon.
- She won the Bronze Ball at the 2019 World Cup, an award given to the third-best player of the tournament.
- Lavelle was the No. 1 overall pick at the 2017 NWSL college draft by the Boston Breakers.



Rose Lavelle during the USWNT Victory Tour against Republic of Ireland. August 03, 2019, Pasadena, California. (Photo by Katharine Lotze/Getty Images)







Naomi Osaka during the Western & Southern Open at Lindner Family Tennis Center on August 15, 2019. (Photo by Matthew Stockman/Getty Images)

## NAOMI OSAKA

Age 21

Japan

**WTA:** 2019 Australian Open Champion,  
2018 U.S. Open Champion

**Endorsements:** Nike, Nissin, Mastercard, Nissan, P&G, Citizen, ANA, Bare Minerals, Yonex, Shiseido, BODYARMOUR, Hyperice, Muzik

### CAREER HIGHLIGHTS\*

- Naomi Osaka became the first Japanese player to win a Grand Slam tournament when she was victorious in the women's singles at the 2018 U.S. Open.
- Osaka beat Serena Williams in the women's singles final at the 2018 U.S. Open. She was born 11 days before Williams played her first official match.
- After winning the 2019 Australian Open, Osaka became the first player from Asia to be ranked No. 1 in singles in either the ATP or WTA rankings.

## SIMONE BILES

Age 22

U.S.

**Artistic Gymnastics**

**Endorsements:** Beats, Caboodles, Core Power, GK, Mattress Firm, Spieth America

### CAREER HIGHLIGHTS\*

- Simone Biles equaled the record for most gold medals by a female in artistic gymnastics at a single Olympic Games when she won four golds in Rio de Janeiro in 2016. She was the fifth female to achieve this.
- Biles won four gold medals at the 2018 World Championships in Doha. It took her tally of world titles to 14, a record for a male or female.
- She is one of only three multiple winners of the Laureus World Sports Award for Sportswoman of the Year, alongside Serena Williams and Yelena Isinbayeva.



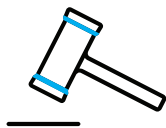
Simone Biles competes during the Women's Senior competition of the 2019 US Gymnastics Championships on August 11, 2019. (Photo by Jamie Squire/Getty Images)



Jeron Smith talks on-stage at May's Leaders Sport Business Summit in New York.

## JERON SMITH: HOW STEPH CURRY TRANSITIONED FROM ENDORSEMENTS TO ENTERPRISE

Three-time NBA champion Stephen Curry became the latest globally renowned athlete to create his own media production company, Unanimous Media, in 2018. The Golden State Warriors star hired former Nike and White House executive Jeron Smith as Chief Executive and quickly agreed to a multi-year partnership with Sony Studios. As Smith explains, it's all part of an evolving approach to Curry's commercial activities, a move from 'endorsements to enterprise.



### UNANIMOUS VERDICT

"Stephen is blessed to have an incredibly successful career. That's afforded him an incredible platform. Authenticity is everything and he now wants to use that platform to drive his purpose and his passion. When we first started chatting about what he wanted to do, he really homed in on this idea of inspiration, impact and empowering others. There was no more effective way to inspire and impact than through the sharing and dissemination of content. When it comes to operationalizing that, we landed on the idea of Unanimous Media. To do it effectively you need partners, and we have a deal with Sony Studios, which spans film, television and digital content—what we like to call experiential media. The reason they landed at Unanimous is because they understood the strategic pillars of our business, that authenticity was everything. They have the executives and expertise to help deliver against that."



### ACCESS ALL AREAS

“We have a new partnership with Facebook Watch. We executive produced a series which dives deeper into Steph’s life. He hates the word brand because ‘I am who I am,’ but when you look at those brand pillars – faith, family, sport – this series dives into each of those. Initially he was a little hesitant to do this. Our deal with Sony is Steph mostly behind the camera, as an executive producer, reading scripts, providing notes on creative, but this is him in front of the camera, an intimate look into his life – something where you’re not always super-comfortable with the cameras being around. But when we had the discussion about whether we were going to do Stephen versus the game with Facebook, it really came back to that initial conversation around what he wanted to use this platform to do. He is doing that by giving the audience an intimate look at his life.”



### SEARCHING FOR SYNERGIES

“One of the main purposes of trying to evolve Stephen’s portfolio was moving from a traditional endorsement model to more of an enterprise model – that hat trick of an athlete endorsement is equity, royalties and cash. It’s tough to get all three, but it’s beautiful when you do. It’s looking for synergies across the portfolio – Under Armour and our deal with Sony are great examples of us taking an enterprise approach to partnerships.”



### GETTING STRATEGIC

“You talk about the use of analytics, quantitative or qualitative, on social platforms and what resonates with Steph’s audience, and it starts with partnerships. You want to have partners that have shared values and values that align with your mission vision. The rare times that doesn’t happen you can get into creative disagreements and you point to the analytics, the KPIs on your platforms to help encourage your partner to understand and see what works well with your shared consumer demographic is always helpful and effective. The first thing I do when sitting down with a partner – sometimes a partner will come to you with a vision but sometimes you’re taking a concept to a brand – is understand the strategic objectives of that partner. Every organization has a three-year, five-year plan with high level objectives. It starts there. When you find that synergy, you fall into a great partnership.”

## CONCLUSION

Relationships between athletes and brands are becoming more meaningful, more integrated and more measurable, in many cases moving far beyond the traditional and straightforward product endorsement.

Brands tend to have clearer strategic objectives, while the top athletes—guided and advised by professional experts—have a more defined set of values and ambitions for how they wish to be perceived off the field, pitch or court.

There have never been more ways for an athlete—and a partner brand—to speak directly to fans. Social media platforms, in particular, have opened up all sorts of opportunities for authentic and meaningful content but also present certain risks. Recent history is littered with examples of ‘social media fails,’ from mistaken posts to controversial views, often inevitably followed by the early termination of brand relationships.

There are other considerations in any athlete-brand relationship: is there, for example, a conflict between the personal endorsement and any commercial partnership already in place with the team for which the athlete plays? Are deals global or do they just cover a certain territory? How should athletes balance branded content and a peek behind the scenes of their life on their various social channels? And at a polarizing time, how does the partner brand feel about an athlete commenting on a political, social or ethical issue?

# NIelsen SPORTS PRODUCTS & SERVICES



## SPORTS MEDIA VALUATION SUITE

Combines expert analysis, deep data sources and advanced AI to determine fair market value of sports sponsorships for rights holders and brands.



## FAN INSIGHTS

Offers a deep understanding of sports fans, including their engagement, attitude, behaviors and perceptions, paired with data about what people watch, listen to and buy.



## RESEARCH & CONSULTING

Transforms large datasets into actionable insights that give rights holders and brands the intelligence to maximize the value of their sports property and sponsorship.

**For more information on identifying endorsement potential or social media valuation, contact us at [know@nielsen.com](mailto:know@nielsen.com).**

## ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global measurement and data analytics company that provides the most complete and trusted view available of consumers and markets worldwide. Our approach marries proprietary Nielsen data with other data sources to help clients around the world understand what's happening now, what's happening next, and how to best act on this knowledge. For more than 90 years Nielsen has provided data and analytics based on scientific rigor and innovation, continually developing new ways to answer the most important questions facing the media, advertising, retail and fast-moving consumer goods industries. An S&P 500 company, Nielsen has operations in over 100 countries, covering more than 90% of the world's population. For more information, visit [www.nielsen.com](http://www.nielsen.com).

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