



# THE REEL

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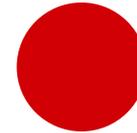
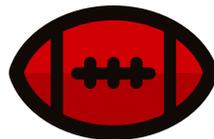
# ABOUT

“Sports PR is a specialist area of PR practice that reveals particular insights into the role that PR plays in contemporary society. The role and practice of PR, which includes media relations, promotion, corporate communication, issues and crisis management, advocacy and public affairs and lobbying, is therefore an important aspect of sports business. PR and sports are both facilitators of communication and relationships and sport is a focus of strategic societal interventions by a variety of actors.”

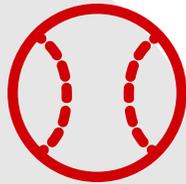
- Jacquie L’Etang, Ph.D. and author of several PR books.

“Sport is a global language that all can understand, regardless of background.”

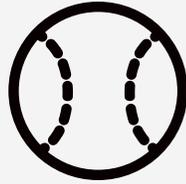
- Rachel Froggatt, Paralympics Commercial & Marketing Director



# DEFINING **THE** SEGMENT



**PASSION**



**COMMONALITY**



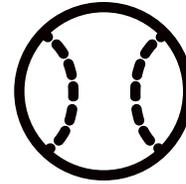
**GLOBAL**



**CULTURAL**



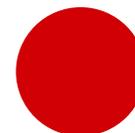
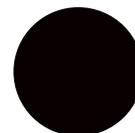
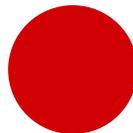
**ACROSS MEDIUMS**



**MULTIPLE AUDIENCES**



**RAPIDLY GROWING**



# PR INDUSTRY

## Market size - Revenue

2016 revenue for the industry and specific sectors

U.S. agencies - \$5.2B

Consumer PR - \$423M

Healthcare PR - \$292M

Technology PR - \$250M

# HOW DO SPORTS PR AGENCIES COMPETE?



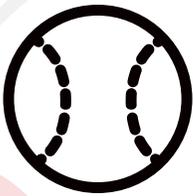
**HIGH PRIORITY VS.  
LOW PRIORITY:**

Importance of sports  
PR to the agency's  
overall business



**INDIRECT VS. DIRECT  
LEVEL OF INVOLVEMENT:**

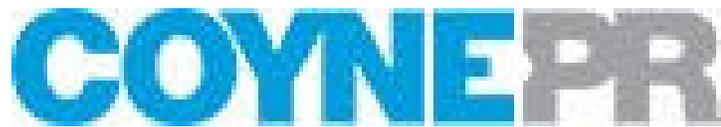
Sponsorships/partnerships  
versus engaging a sports  
client (i.e. NBA player  
representation)



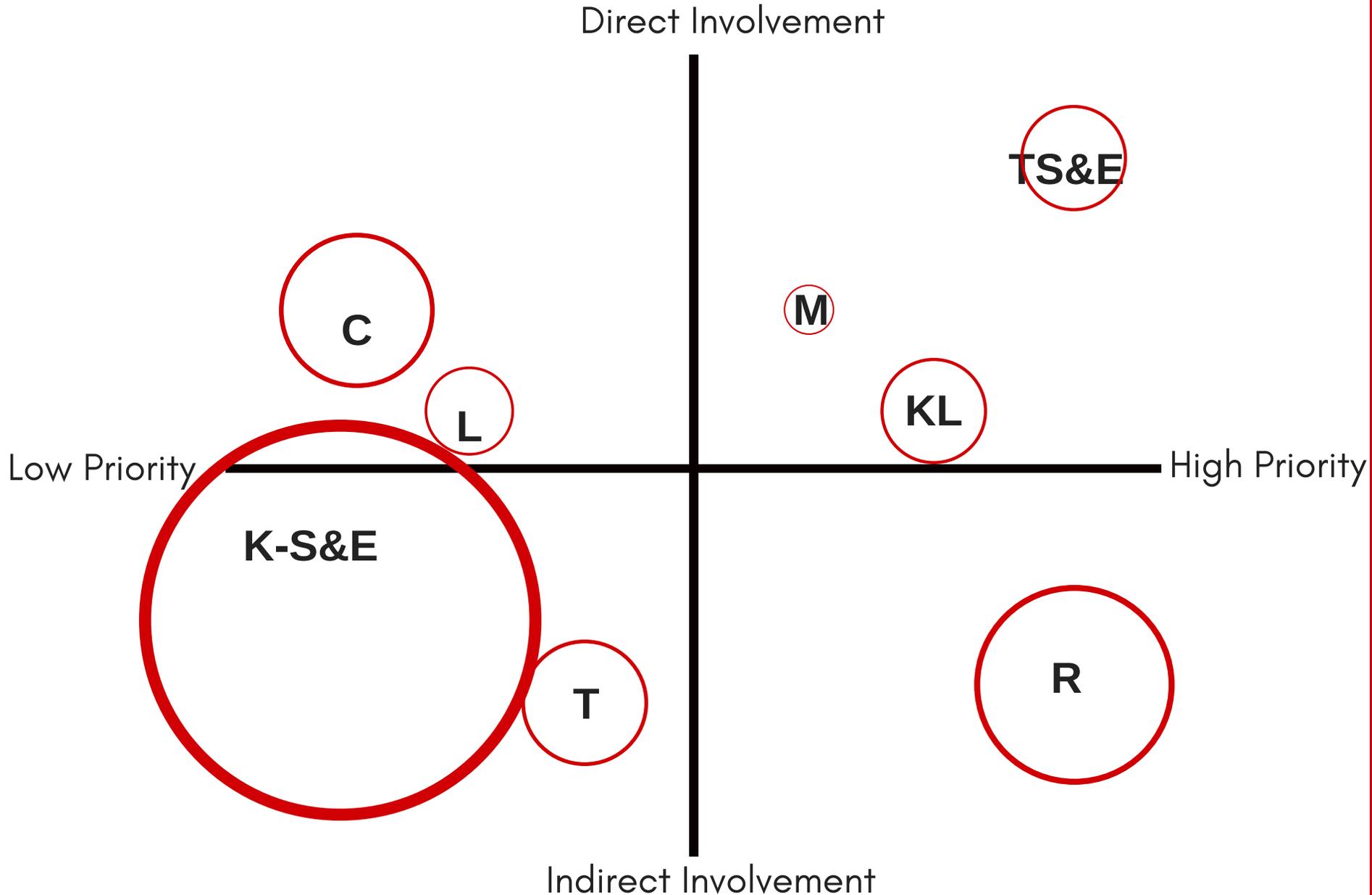
**OVERALL AGENCY  
SIZE:**

Number of employees

● **KEY AGENCIES** ●



# PERCEPTUAL MAP OVERVIEW



## KEY

C= Coyne PR

**TS&E**= Tandem Sports & Entertainment

M= Macesport

**KL**= KemperLesnick

R= Revolution

**T**= Taylor

**K-S&E**= Ketchum Sports & Entertainment

**L**= Levick

**\*Circle size correlates to the number of employees\***

# COYNE PR



## About:

A public relations firm with expertise in PR, social, digital and advertising. Spanning nearly 20 industry verticals, Coyne's client roster includes many of the most respected companies in the world and those who want to be, including The Walt Disney Company, Hard Rock International, Shell Oil, Chrysler, Timberland, Pfizer, VTech, Allergan and the United States Golf Association, among others.

## Value Propositions:

- Numerous high priority clients which increases credibility
- Specializes in crisis management in addition to traditional services

**Clients:** Olympics, USA Swimming Foundation, Red Bull Arena

**Estimated Revenue:** \$5M

**Case Studies:** USTA

# KEMPERLESNIK

**About:** A creative PR, sports marketing and events agency. Clients turn to KemperLesnik to drive the conversation in key markets and to increase brand loyalty through integrated campaigns.

## Value Propositions:

- Sports expertise - extensive experience working in the golf, basketball and sports media industries
  - Golf expertise - KemperSports - built Kemper Lakes Golf Course, which received national acclaim as the host of the 1989 PGA Championship, the first public access course to do so in history
- Capabilities - hone in on PR, sports marketing and event management
- Business-oriented - website constantly reinforces campaigns help drive sales

**Estimated Revenue:** \$7.4M

## Clients:

RESTORE BY  
KATONA

BMW  
CHAMPIONSHIP

NFL DRAFT

POWERADE  
JAMFEST

# KETCHUM - SPORTS & ENTERTAINMENT (KSE)

## About:

Helping brands connect with their audiences' passions in sports & entertainment to deliver their company's story and drive business by staying on top of the latest trends in entertainment and sports and bringing established relationships across the industry to clients

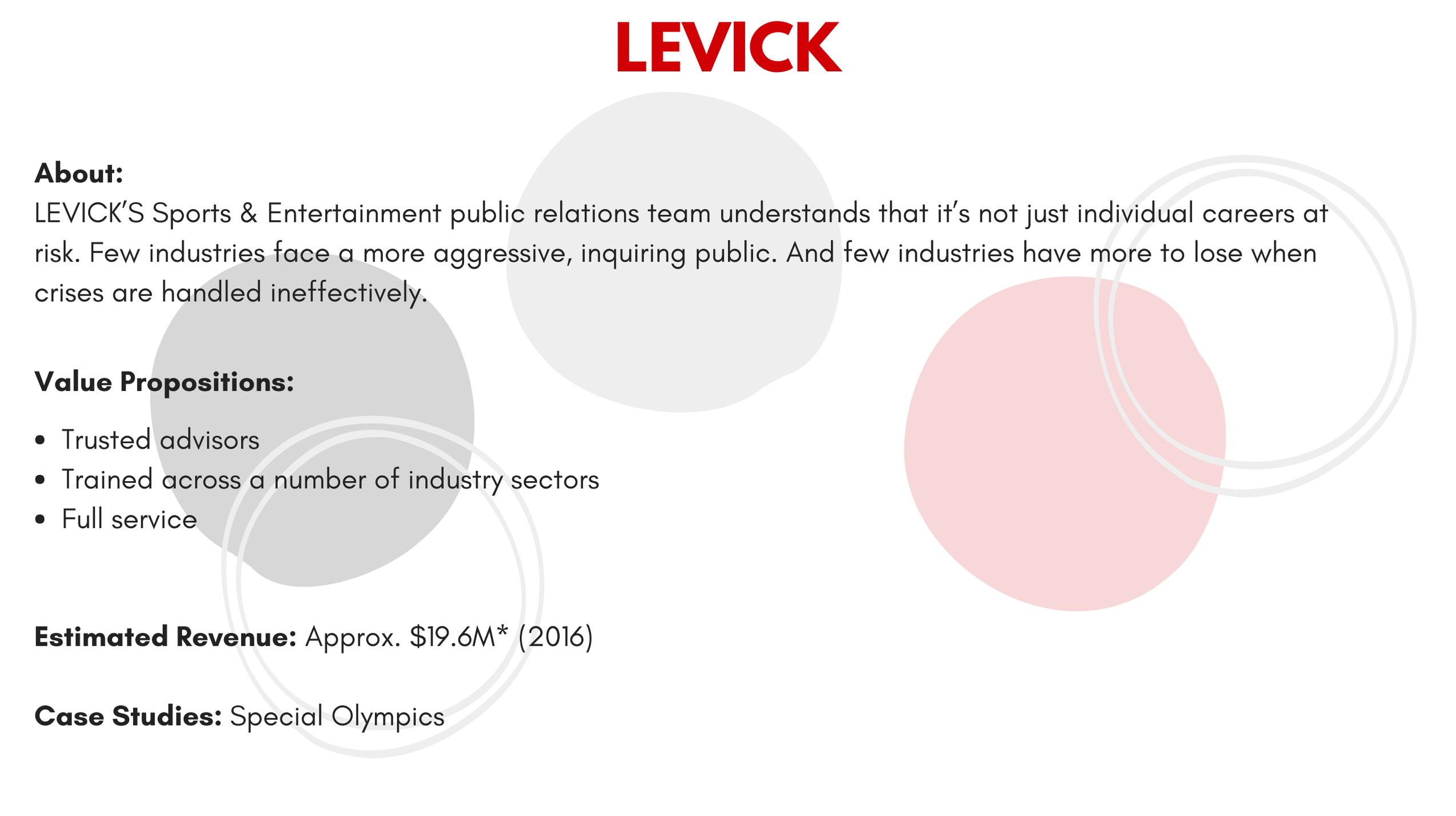
## Value Propositions:

- Global relationships
- Experience across related segments of the business
- Full Service
- Ketchum Game Plan Program

**Estimated Revenue:** Global \$500M; US \$300M (2016)

**Case Study:** KSE Helps Save Olympic Wrestling

# LEVICK



## About:

LEVICK'S Sports & Entertainment public relations team understands that it's not just individual careers at risk. Few industries face a more aggressive, inquiring public. And few industries have more to lose when crises are handled ineffectively.

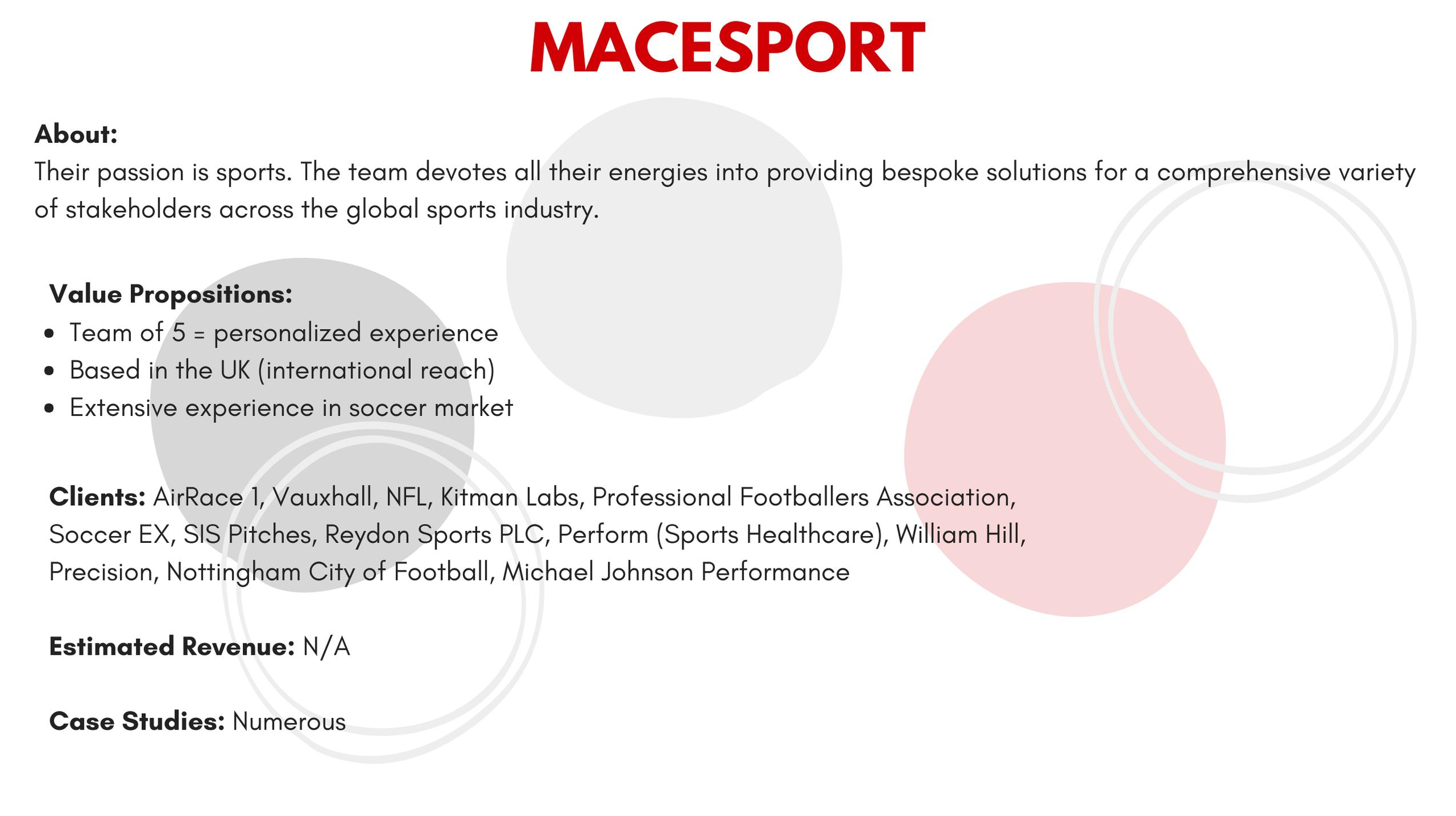
## Value Propositions:

- Trusted advisors
- Trained across a number of industry sectors
- Full service

**Estimated Revenue:** Approx. \$19.6M\* (2016)

**Case Studies:** Special Olympics

# MACESPORT



## About:

Their passion is sports. The team devotes all their energies into providing bespoke solutions for a comprehensive variety of stakeholders across the global sports industry.

## Value Propositions:

- Team of 5 = personalized experience
- Based in the UK (international reach)
- Extensive experience in soccer market

**Clients:** AirRace 1, Vauxhall, NFL, Kitman Labs, Professional Footballers Association, Soccer EX, SIS Pitches, Reydon Sports PLC, Perform (Sports Healthcare), William Hill, Precision, Nottingham City of Football, Michael Johnson Performance

**Estimated Revenue:** N/A

**Case Studies:** Numerous

# REVOLUTION



## **About:**

A unique collective of marketing experts, built to move the needle for brands looking to leverage sports as a means to successfully achieve business goals. Navigating the sports marketing landscape requires experienced insiders, like those at rEvolution, who speak the language and make things happen.

## **Value Propositions:**

- Focuses solely on sports
- Specializes in integrated sports marketing for brands

**Clients:** Chipotle, Youtube, Samsung, Nickelodeon

**Estimated Revenue:** \$25M

**Case Studies:** A Night On The Runwade

# TANDEM SPORTS + ENTERTAINMENT

## About:

A full-service sports and entertainment agency with expertise in athlete management, talent representation, marketing, communications and publicity services.

## Value Propositions:

- Agency approach - sports and entertainment representation, marketing and brand development, Tandem Communications Group and philanthropy
- Employee expertise - collectively the agency has over 100 years of experience in the sports and entertainment industry

**Estimated Revenue:** \$6M

## Clients:

Grant Hill, Co-host  
NBA Inside Stuff

Jeremy Lin,  
Brooklyn Nets

Alana Beard, Los  
Angeles Sparks

David Hale, Los  
Angeles Dodgers

# TAYLOR

## About:

With over 30 years as brand counselor and public relations partner to the world's leading sports marketers, they have unmatched knowledge and insights of the fan experience as it relates to social media behavior around sporting events.

## Value Proposition:

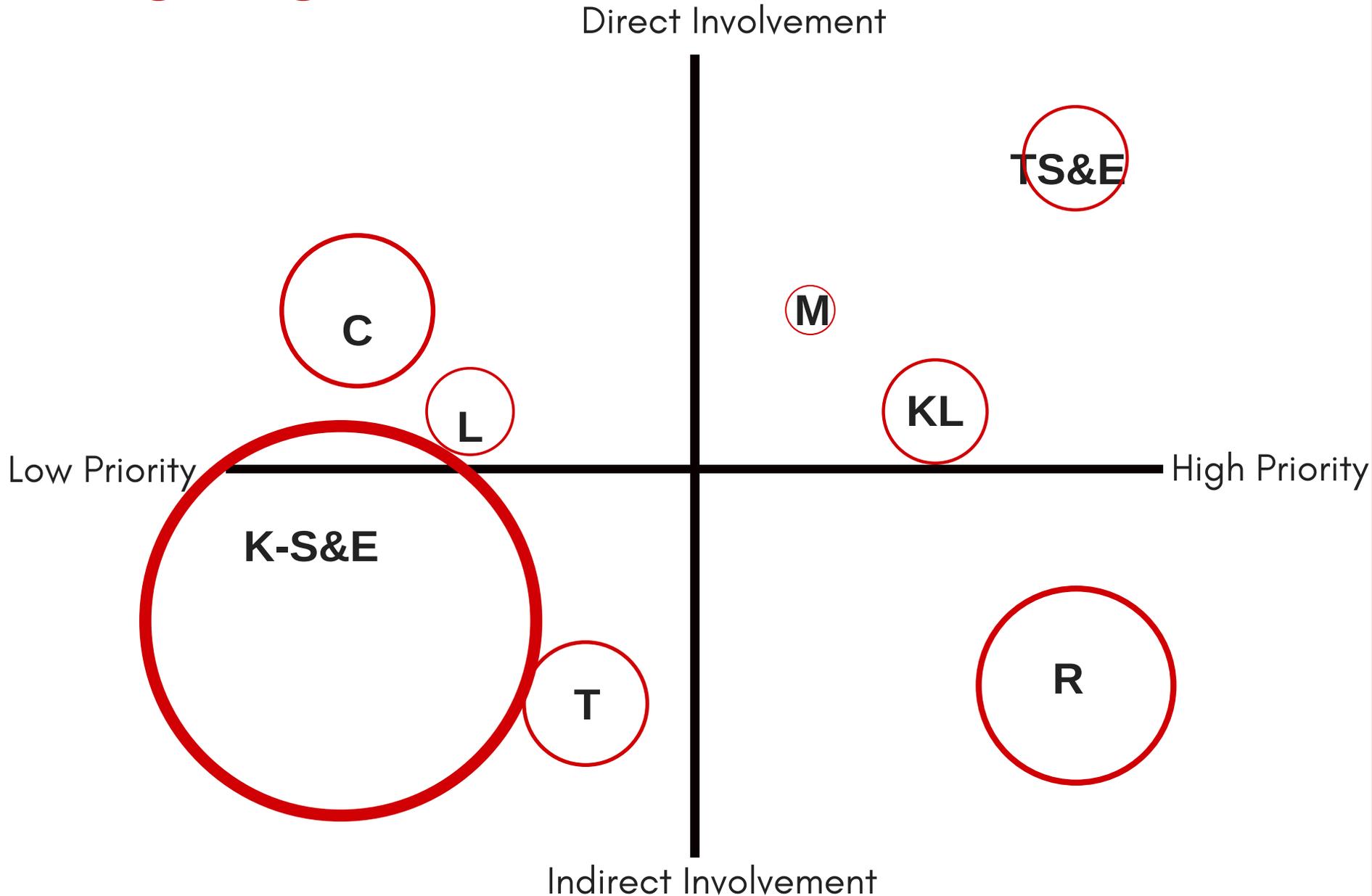
- Consumer brands with sports partnerships

**Clients:** Draft Kings, Panini (sports collectibles), Nike/Jordan Brand

**Estimated Revenue:** \$9.8M

**Case Studies:** Tide Super Bowl Ad, Crown Royal sponsored event at NASCAR, Mercedes-Benz partnership with New Orleans Saints to honor Hurricane Katrina victims, Bounce for Men at NFL training camp

# PERCEPTUAL MAP



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# 2018

## TOP TRENDS



- eSports/ Gaming
- Social media and the “follower phenomenon”
- Targeting female audiences
- Globalization of sport fan bases
- Smart arenas
- Merchandising
- Digital marketing
- Virtual reality (VR)
- Associating with a social cause
- Reaching out to all

The background features several overlapping circles and double-lined rings. On the left, there are two solid grey circles and one double-lined grey ring. In the center, there is one solid light grey circle. On the right, there is one solid light red circle and one double-lined grey ring. The text 'THANK YOU!!!' is centered horizontally across the middle of these shapes.

**THANK YOU!!!**