

PARTNERING BRITISH TENNIS

TIMES HAVE CHANGED!

UK BUSINESS IS DOING WELL...

**...BUT BREXIT, TRUMP AND BRIBERY ACT RESULT IN
UNCERTAINTY AND NON-COMMITTMENT**

BREXIT



**PLUS.. LOTS OF SPORTS PROPERTIES IN THE MARKETPLACE
INCL. PREMIERSHIP RUGBY, SIX NATIONS, CHELSEA FLOWER
SHOW, THE BOAT RACE, ATP FINALS, TEST MATCH CRICKET...**



...AND BRITISH TENNIS

...WITH MORE TO JOIN



**WHICH MEANS IT IS A COMPETITIVE MARKET AND EVERY
PROPERTY NEEDS TO STAND OUT...**



...AND BE HONEST ABOUT ITS WEAKNESSES

**AND WE BELIEVE WE PRESENT A VERY INTERESTING
PROPOSITION TO THE MARKET...**



**IN 2009 BRITISH TENNIS RE-STRUCTURED AND SECURED ITS 1ST
LEAD PARTNER...**



REVENUE TRIPLED.



PRIOR TO THAT, WE'D OPERATED WITH LOTS OF SPONSORS, NONE OF WHOM INVESTED AT SIGNIFICANT LEVELS. IT WAS A CLUTTERED HOUSE.



**SO AEGON CAME IN AND OWNED EVERYTHING.
FROM GRASSROOTS TO THE PROFESSIONAL GAME.**



**AND IT'S BEEN VERY SUCCESSFUL FOR THEM, EVEN SINCE 2015
RECOGNITION CONTINUES TO GROW (+127%).**

IT'S ENABLED US TO INVEST IN MORE THINGS.



**HOWEVER ALL GOOD
THINGS COME TO AN END
AND BOTH AEGON AND
BRITISH TENNIS ARE RE-
FOCUSSING IN 2018**

WHAT WE REALISED IS THAT WE DO SO MANY THINGS...



FROM SCHOOLS TO CLUBS TO ELITE THAT IT'S A COMPLEX OPPORTUNITY FOR ONE BRAND TO...

...AFFORD, LEVERAGE AND SERVICE.



IN PARTICULAR, ONE PLATFORM STOOD APART FROM THE REST...

THE QUEEN'S TOURNAMENT PRESENTS A VERY DIFFERENT PROPOSITION TO THE REST OF OUR TENNIS ACTIVITIES



SO WE SPLIT THE LEAD PARTNERSHIP...

**...TAKING ADVANTAGE OF THE RIGHTS THAT WE HAVE AT OUR
DISPOSAL TO PRESENT TWO VERY DISTINCT AND ATTRACTIVE
OPPORTUNITIES TO THE MARKET...**



**ONE FOR A BRAND WHICH WILL CONTINUE TO DEVELOP THE
QUEEN'S EVENT TO BE ONE OF THE MOST HIGH PROFILE EVENTS
ON THE GB SUMMER CALENDAR...**



...FROM BOTH A SPORTING AND A SOCIAL PERSPECTIVE.

DRIVING HOME ITS UNIQUE STRENGTHS...

- **BEST PLAYERS IN THE WORLD**
- ***BEST TOURNAMENT IN THE WORLD, AS VOTED BY THE PLAYERS***
- **BEST 2016 PLAYER FIELD IN ATP500 HISTORY**
- **11 MILLION UNIQUE TV VIEWERS**
- **IN HEART OF NATIONS CAPITAL**
- **THE STARS ATTENDING**





WITH A RECORD 2016 FINAL ON THE BBC PEAKING AT 3.8M

**AND THE OTHER TO HELP US TO ACHIEVE OUR MISSION TO GET
MORE PEOPLE PLAYING TENNIS MORE OFTEN**



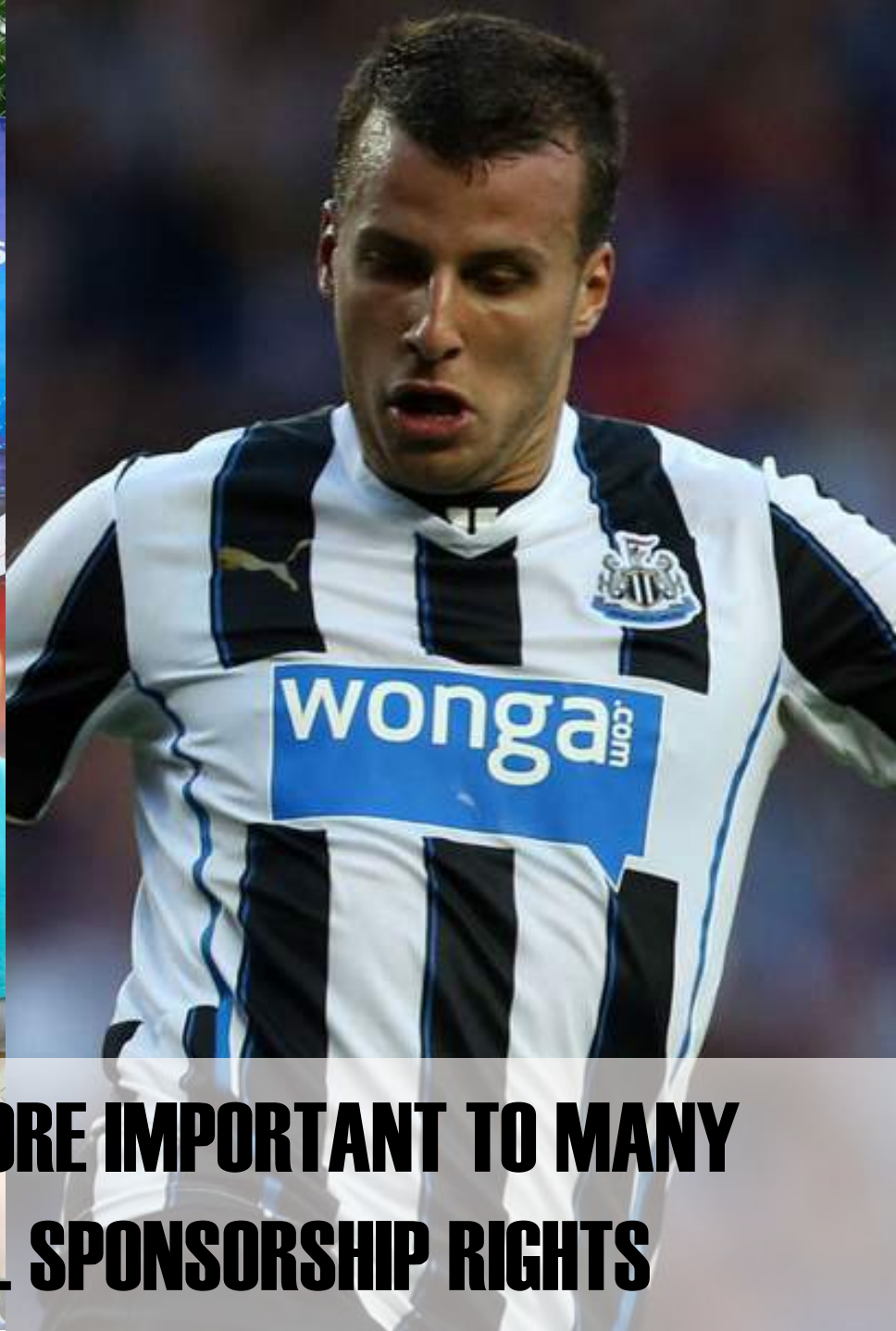
**THAT'S A MUCH MORE COMPLEX
COMMERCIAL PROPOSITION BUT A VERY
POWERFUL ONE.**

**PRESENTING A BRAND WITH AN
OPPORTUNITY TO TARGET THOSE 5
MILLION ADULTS WHO PICK UP A
RACKET AND THE 17 MILLION FANS
OF THE SPORT**





ENABLING THEM TO ENGAGE WITH OUR PLAYING BASE IN A MEANINGFUL MANNER, ENHANCING THE EXPERIENCE OF OUR “CUSTOMERS” WHILE DRIVING THEIR OWN BRAND LOYALTY AND PROPENSITY TO BUY



AND TODAY COMMUNITY IS MORE IMPORTANT TO MANY BRANDS THAN TRADITIONAL SPONSORSHIP RIGHTS

**SO WE'RE LOOKING FOR A BRAND WHICH WILL REALLY
HELP SUPPORT THE SPORT BEYOND THE ££'S. WE'RE
LOOKING FOR A BRAND WHO SPEAKS WITH LOTS OF
PEOPLE ON A REGULAR BASIS.**



WE'RE LOOKING FOR A PARTNERSHIP.

SO WE BELIEVE WE HAVE TWO PROPOSITIONS WHICH WILL APPEAL TO TWO VERY DIFFERENT BRANDS.



AND WHILE THE MARKET IS SHAKY IT HAS NEVER BEEN A BETTER TIME FOR TENNIS...





...VISIBILITY OF THE SPORT UP 41%
PARTICIPATION UP 0.6%
HUGE SUCCESS ON THE PROFESSIONAL STAGE!

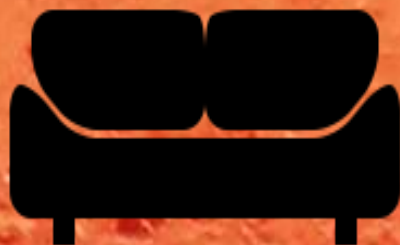
**THE SECOND MOST FOLLOWED
SPORT IN GB...**



WITH...



**5M
CURRENT PLAYERS**



**6M
LAPSED PLAYERS**



**17M
FOLLOWERS**

DELIVERING A SIGNIFICANT TV PLATFORM

BBC

★EUROSPORT

- **13M UNIQUE TV VIEWERS**
- **12 DAYS & 50 HRS LIVE COVERAGE ON BBC**
- **DISTRIBUTED TO 180 TV MARKETS GLOBALLY**
- **BIGGER THAN THE ENTIRE PREMIERSHIP RUGBY SEASON**



IS PLAYED ALL YEAR ROUND...



AND PARTICIPATION IS BIGGER THAN CRICKET, RUGBY UNION AND RUGBY LEAGUE COMBINED!



THANK YOU