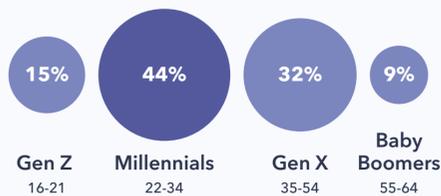


Profiling Rugby Fans

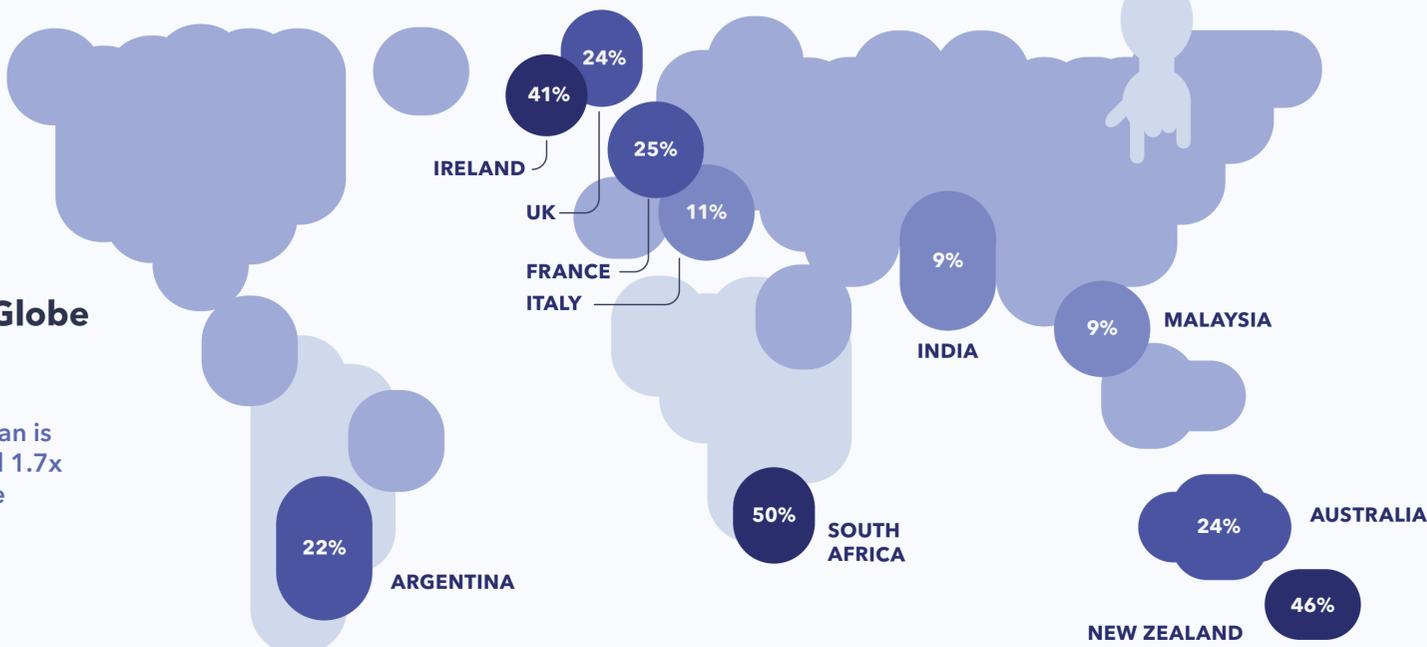
7% of global internet users are rugby fans



Rugby Fans Across the Globe

TOP 10 MARKETS

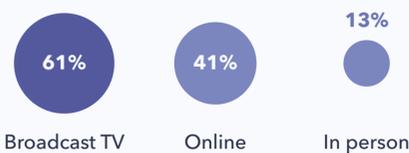
Average rugby fan is 35 years old and 1.7x more likely to be in the top 10% income bracket



VIEWING HABITS

TV sets dominate their viewing habits, but nearly half watch rugby online

% who watch rugby via the following



SPORTS COMPETITIONS WATCHED

% who say they regularly watch the following sporting events/leagues on broadcast TV or online



SECOND-SCREENING ACTIVITIES

% who say they do the following on another device while watching TV

- 49% Use social media
- 47% Chat to/message friends
- 44% Read my emails
- 36% Play games
- 36% Read the news
- 33% Search for products to buy
- 31% Search for info related to what I'm watching
- 24% Share my opinion of a TV show
- 23% Interact with the online content of the show

GENERAL SPORT CONTENT ONLINE

% who say they have done the following last month



1.7x more likely to have posted a sports-related opinion online

ESPORTS ENGAGEMENT

% who say they have done the following last month



They're also 1.8x more likely to have played a sports video game in the last 12 months (42% have)

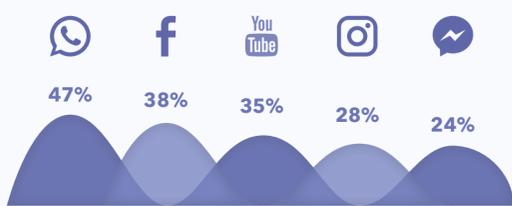
3 in 10 say watching/following sports events is a main reason for using social media

34% follow sports stars on social media

Social media is key while watching rugby, showing their multi-platform deep engagement with the content

SOCIAL PLATFORMS USAGE

% who visit/use the following social platforms more than once a day



BRAND ENGAGEMENT ON SOCIAL MEDIA

% who follow the below on social media

| | |
|--|-----|
| Liked/followed a brand on a social network | 27% |
| Visited a brand's social network page | 26% |
| Used a social networking "share" button on a website | 24% |
| Clicked on a sponsored post on a social network | 23% |
| Asked a question to a brand on a social network | 21% |

SPORTS PLAYED

% who say they regularly play or take part in the following sports



47% of rugby fans play six or more sports

BUYING BEHAVIOR ONLINE

56% say researching products/brands is an important reason for using the internet

TOP 5 BUYING ATTITUDES

% who say they agree or strongly agree with the statements below

| | |
|--|-----|
| I always try to find the best deals | 75% |
| I always like to try new products | 69% |
| I try to buy natural/organic products | 62% |
| I regularly inform friends and family on new products | 62% |
| I would pay more for sustainable/eco-friendly products | 61% |

Their go-to sports brands

% who have bought products from the following sports brands in the last 1-2 years



They seek status and affordability at the same time

TOP 5 BRAND-RELATED ATTITUDES

% who say they agree or strongly agree with the statements below

- Once I find a brand I like I tend to stick to it **65%**
- I would rather spend money on a unique experience than a status brand **62%**
- When buying a product, the price is more important for me than the brand name **56%**
- I tend to opt in for personalized loyalty rewards from brands **55%**
- I am a brand conscious person **53%**

ONLINE COMMERCE HABITS

% who say they have done the following on the internet last month

| | |
|---|-----|
| Visited an online retail site or store such as Amazon | 93% |
| Searched for a product or service you want to buy | 85% |
| Purchased a product online | 75% |
| Used a price comparison service | 65% |
| Visited an online auction site | 64% |
| Posted a review of a product, company or service | 56% |
| Visited a group-buying/deal site such as Groupon | 46% |
| Sold a product online | 44% |

METHODOLOGY

Unless stated otherwise, all figures are taken from our Q3 2018 wave of online research among 113,932 internet users aged 16-64 across 45 countries. Among this cohort, there were 8,728 Rugby Fans - defined as internet users who say they follow or take part in rugby, or watch it on TV, online or in person. Note that China is excluded from percentages relating to specific/named social networks and apps.