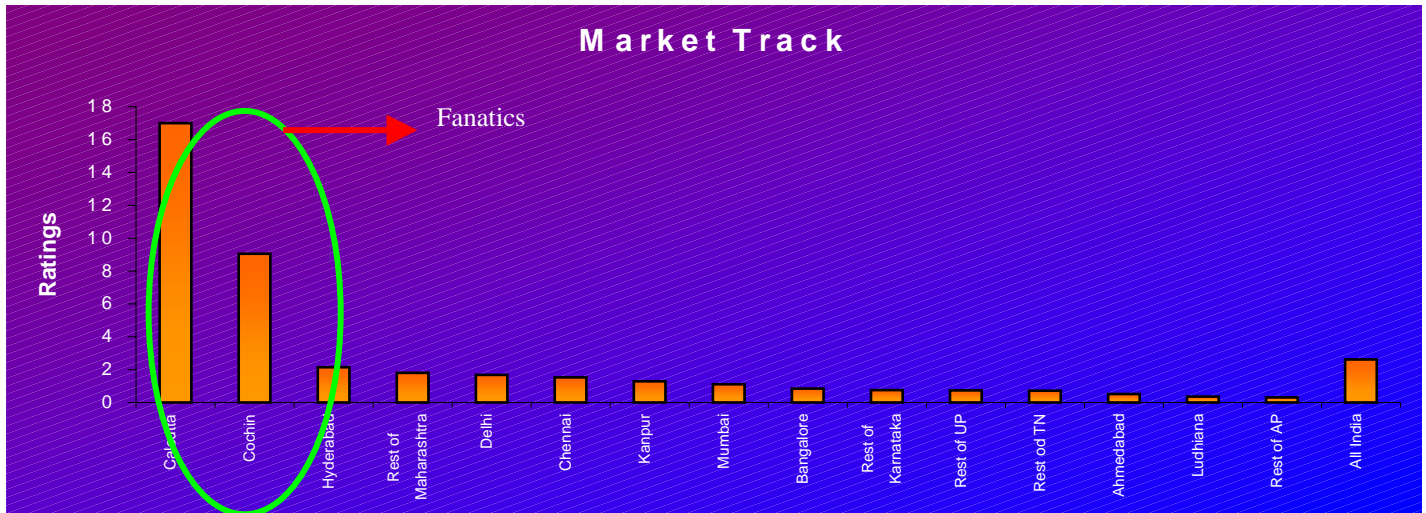


FIFA World Cup- A Compilation

June 2002 witnessed India being invaded by the 'Soccer Fever' frenzy of the FIFA World cup. The event was embraced by a plethora marketing and media activity. In this country where cricket enjoys cult status, diverting the marketing and media spends was indeed a gamble for the media planners and buyers. This fact is more accentuated if one considers that, Ten Sports, the channel that was to telecast the event was a new entrant in the Indian market. As the event that captured the imagination of an entire nation including the advertising, media and entertainment fraternity drew to close, advertisers and media specialists are rushing to understand what actually happened. In this report, we seek to answer all such questions.

'Most Watched' markets

The viewership of the event did not follow a uniform pattern across markets.



* Finals have not been included in the above analysis

- **Fanatics**: The above viewership ladder clearly indicates that Calcutta and Cochin emerged as the most football fanatic markets. The tournament enjoyed a near cult status in Calcutta with the average viewership nearly double than the next highest viewing market, Cochin.
- **Enthusiasts**: The fans in Hyderabad, Delhi, Chennai, Kanpur, and Mumbai. Rest of Maharashtra, that is urban Maharashtra except Mumbai, has recorded the fourth highest viewership. This has dispelled the myth that football viewership is a metro –driven phenomena.
- **Laggards**: Bangalore, Rest of Karnataka, Rest of UP, Rest of TN, Ahmedabad and Ludhiana remain at the bottom of the viewership ladder.

The interesting point to investigate at this time would be to note the effect of football on the general entertainment mass channels like Star Plus, Sony and Zee TV.

Calcutta

Channel Shares -Live FIFA Telecast			
Channel	Before FIFA	During FIFA	% Change
Star Plus	7.1	4.86	-32
Sony	2.65	2.07	-22
Zee TV	2.27	1.82	-20
Ten Sports	0.07	36.8	52471

Delhi

Channel Shares -Live FIFA Telecast			
Channel	Before FIFA	During FIFA	% Change
Star Plus	27.4	23.96	-13
Sony	5.27	5.39	2
Zee TV	6.16	6.14	0
Ten Sports	0.19	6	3058

Mumbai

Channel Shares -Live FIFA Telecast			
Channel	Before FIFA	During FIFA	% Change
Star Plus	14.46	12.36	-15
Sony	7.07	6.64	-6
Ten Sports	0.46	3.9	748
Zee TV	7.5	7.23	-4

Target Audience: Cable & Satellite SEC AB 15 years and above

Source :TAM MEDIA RESEARCH

The tables above depict the effect of the live telecast of football matches on the general entertainment channels. The channel shares above depict that the Star Plus, Sony and Zee TV have lost considerable shares during the FIFA phenomena. The key markets of Mumbai and Delhi show that Star Plus has taken a plunge in viewership.

Top World Cup Matches

Top League Matches-All India		Ratings				
Rank	Match	All India	Calcutta	Cochin	Mumbai	Delhi
1	Argentina Vs. England	4.88	32.55	20.38	1.53	3.34
2	Brazil Vs. China	3.43	27.2	9.97	1.2	1.57
3	France-Uruguay	3.32	21.74	12.46	0.64	3.09
4	Brazil -Turkey	3.2	26.71	10.1	1.28	0.69
5	Argentina Vs.Nigeria	3.03	25.07	14.73	0.59	0.992
6	France Vs. Senegal	3	24.42	16.06	0.06	1.46
7	Mexico Vs. Italy	2.83	19.35	17.28	0.4	3.17
8	Cameroon Vs. Germany	2.62	17.25	14.7	0.91	1.38
9	Spain Vs. Paraguay	2.52	16.38	8.32	0.78	2
10	Costa-Rica Vs. Brazil	2.52	17.15	14.55	1.57	1.86

Target Audience: Cable & Satellite SEC AB Males 15 Years and above

SOURCE: TAM MEDIA RESEARCH

From the above table, it is clear that maximum viewership was attracted for matches with the top teams like Brazil, Argentina and Germany. The market-wise performance further provides a glimpse of the manic interest in Calcutta and Cochin as compared to the other key markets.

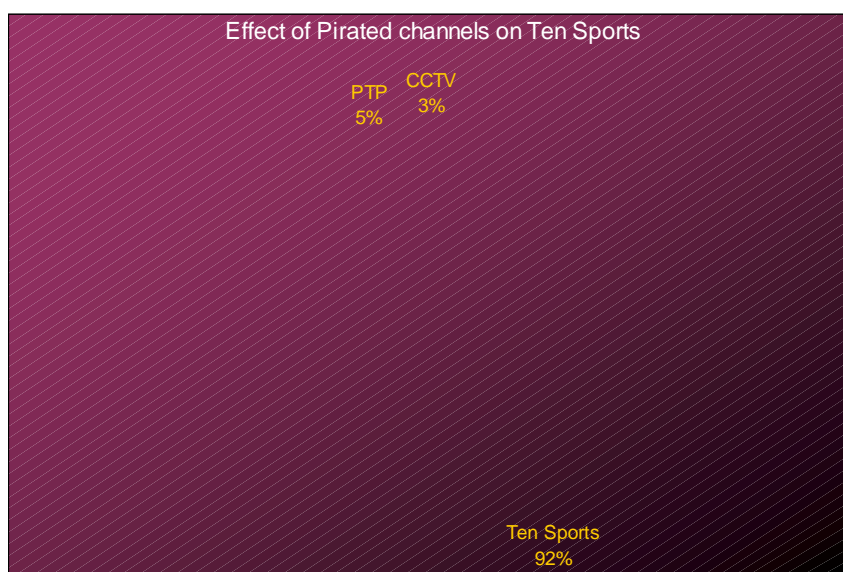
Knock-Out Matches	Ratings				
	Match	All India	Calcutta	Cochin	Mumbai
Finals: Brazil Vs. Germany	10.5	54.7	18.8	2.3	2.4
Semi Finals-Brazil Vs. Turkey	7.02	33.75	19.46	4.92	7.33
Semi Finals-Germany Vs. Korea	6.6	32.35	22.01	3.81	3.02
Qtr Final-Senegal Vs. Turkey	5.52	32.29	10.6	3.04	3.87
Qtr. Final-England Vs. Brazil	5.44	34.04	16.96	4.05	2.64
Qtr. Final-Spain Vs. Korea	4.9	22.65	11.01	3.79	3.79
Qtr. Final-Germany Vs. USA	4.62	25.99	18.58	2.61	1.25
Round 16-Brazil Vs. Belgium	6.28	42.41	16.65	3.47	2.81
Round 16-Korea Vs. Italy	4.9	31.04	11.16	2.45	2.5
Round 16-Spain Vs. Ireland	3.73	24.98	9.58	1.62	1.76
Round 16-Sweden Vs. Senegal	3.59	19.24	11.84	1.63	4.47
Round 16-Denamrk Vs. England	3.44	25.89	6.63	1.03	1.83
Round 16-Germany Vs. Paraguay	2.92	18.14	7.72	0.5	3.72
Round 16-Japan Vs. Turkey	2.54	15.14	6.96	1.81	0.31
Round 16-Mexico Vs. USA	2.21	10.87	10.85	2.24	1.74

SOURCE: TAM MEDIA RESEARCH

The viewership built up as the tournament progressed to the knockout matches. Brazil seems to be the most watched team across markets with a stupendous 42.41 rating in Calcutta in the Knockout stage itself.

Pirated channels erode the shares of Ten Sports

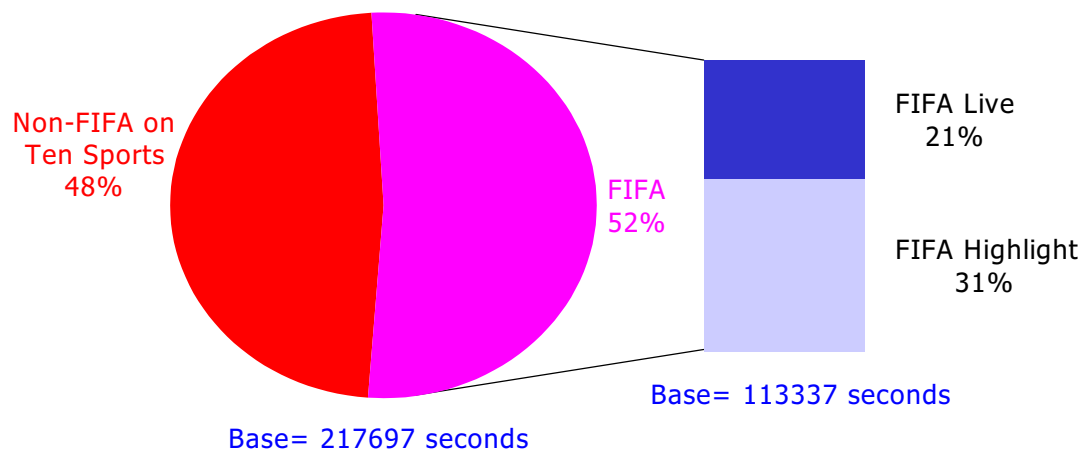
Across India, more than 2.5 million people tuned into the live telecasts of the world cup football on Ten Sports. With the exclusive rights of the football world cup, Ten Sports has tried to entrench itself a major contender for sports viewership in India along with ESPN, Star Sports, Set Max and DD Sports. The event was also a major revenue source as Ten Sports is a pay channel, that means, the cable operators have to pay a per subscriber fee to the channel.



Instead of signing a deal with Ten Sports, some operators in Mumbai, Calcutta and Rest of UP aired foreign language channels like PTP and CCTV that were telecasting the world cup. Out of the total football viewership during the live matches, these pirated channels managed to erode a considerable 8% viewership from Ten Sports.

Live telecast Vs. Highlights!

As per TAM ADEX figures, the advertising pattern on Ten Sports is in favour of the match highlights as shown in chart below.



SOURCE :TAM ADEX

Higher viewerships were expected for Highlights, which were to be telecast in prime time.

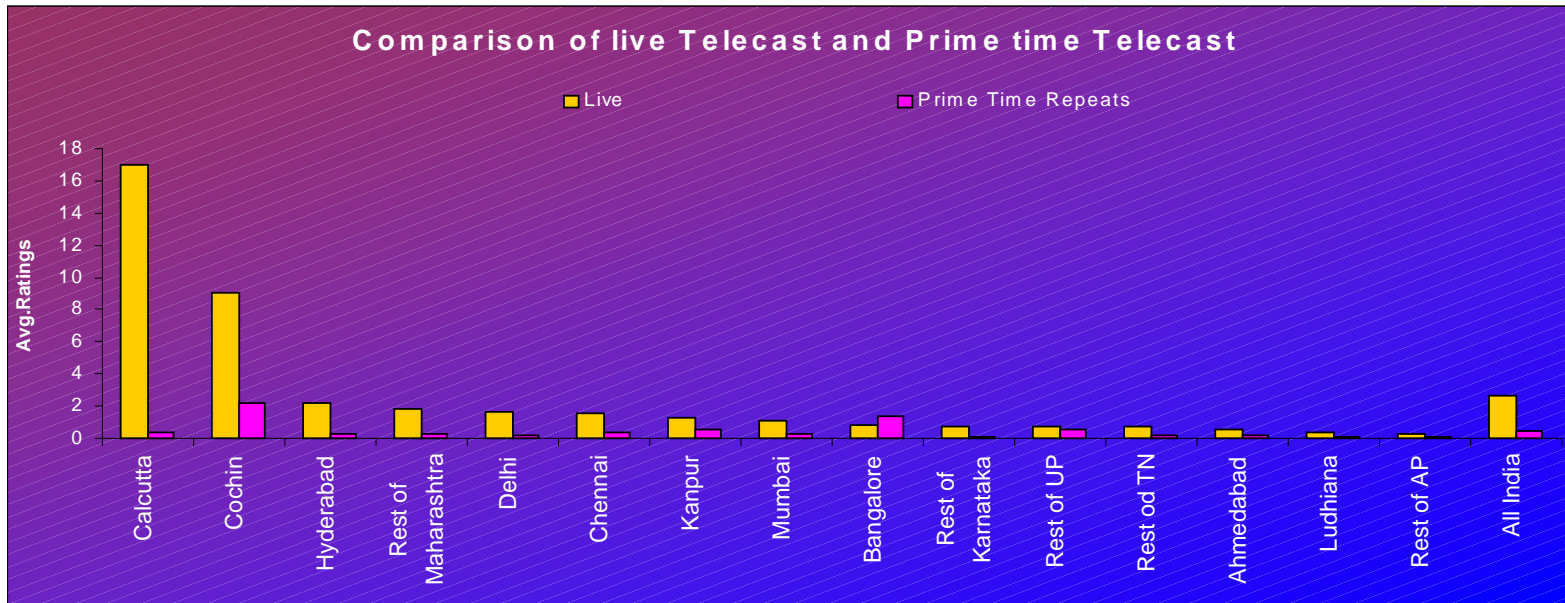
The top brands on FIFA

Rank	Brand	Total Time Bought (Seconds)	Live		Highlights	
			(Secs)	%	(Secs)	%
1	Pepsi	22819	7410	32%	15409	68%
2	Videocon Bazzon	11056	6163	56%	4893	44%
3	Akai Black Belt	9880	5160	52%	4720	48%
4	Electrolus Kelvinator	8390	420	5%	7970	95%
5	Kenstar Tumble Top	5335	3105	58%	2230	42%
6	Sansui Core Series	5225	2760	53%	2465	47%
7	Mastercard	3875	1695	44%	2180	56%
8	DSP Merrill Lynch	3660	1180	32%	2480	68%
9	Mirinda Orange	3451	1350	39%	2101	61%
10	Prudential ICICI	3180	1120	35%	2060	65%

SOURCE : TAM ADEX

The brandwise analysis is extremely interesting. For instance, the chart above shows the top 10 advertisers on Ten Sports in terms of secondages bought on FIFA. While Pepsi, DSP, Mirinda and Pru ICICI display a preference for match highlights, Videocon Bazzon, Akai, Kenstar and Sansui seem to prefer the Live event. The actual viewership data disproves the belief that Highlights would do

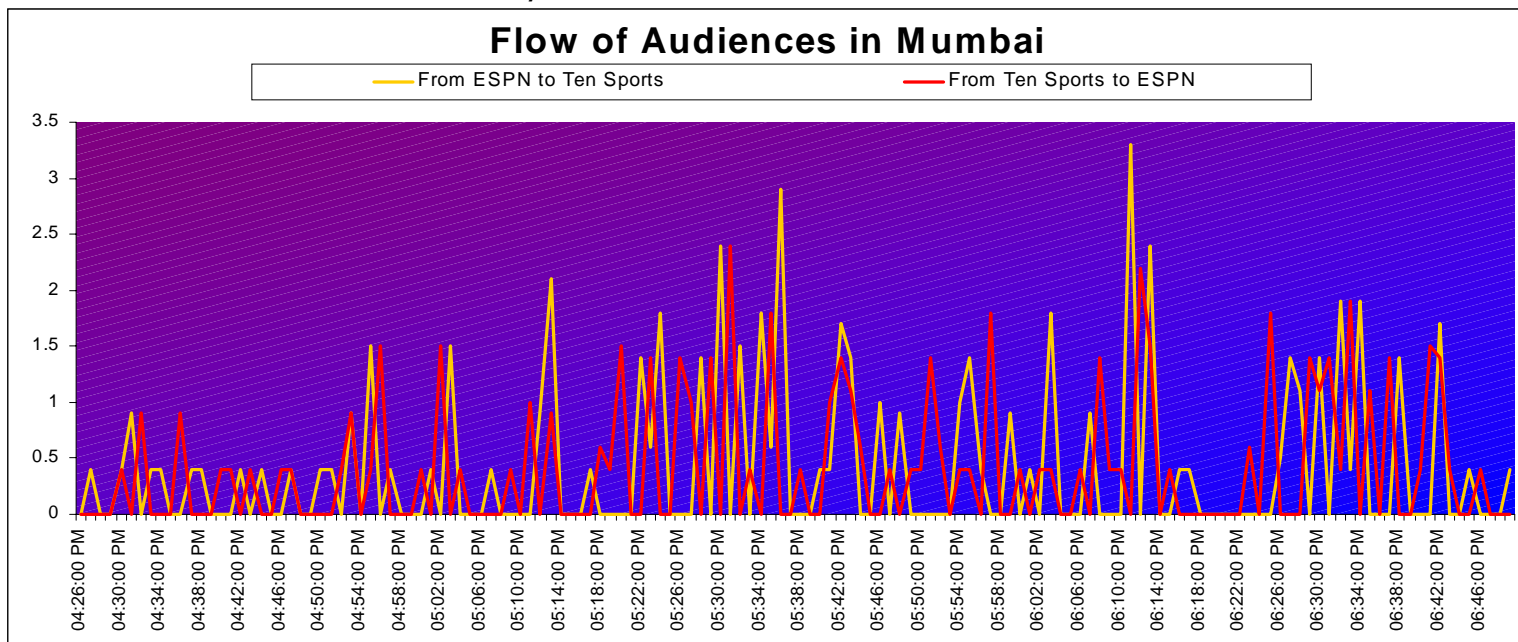
better with all centres with the exception of Bangalore recording higher ratings for the Live event itself as seen below.



Target Group: Cable & Satellite Audiences 15 years and above

SOURCE : TAM ADEX
Cricket versus FIFA

The world cup final was even more interesting from the viewership perspective. Brazil Vs. Germany final was competing against ESPN's telecast of India Vs. England cricket match. This presented a rare and crucial moment for advertisers to gauge the preferences of sports fans across markets. In Mumbai, the ESPN match scored a rating of 7.2 among CS Males 15 Years and above while the football finals scored only 4.6.



Target Audiences: Cable & Satellite Audiences SEC AB Males 15 Years and above

The chart above shows the movement of audiences between the two channels. One can see a high level of chaotic movement of audiences between the two channels. This also throws open a point that the audiences are not shifting just between the breaks but at sporadic intervals.

But then there were those who just didn't play ball! Of all those people who were watching Television in Bangalore during the time of the FIFA Finals, there were 93% who did not glance even for a minute at Ten Sports, PTP or CCTV (or didn't have access to any of the channels)! This number was 73% in Delhi and 58% in Mumbai. Even in Calcutta, of all those who were in front of their TV sets during the time corresponding to the FIFA final, there were 16% audiences who did not come onto viewing FIFA indicating the fact that not all the Calcuttans are Football fans!

Profile of Cricket lovers versus Football Fans

The profile of the 2 show marked differences

Profile of audiences for FIFA World Cup		
Profiles	Avg.Rating	Index
CS 4+ Yrs	1.31	100
SEC A	2.14	164
SEC B	1.60	123
SEC C	1.18	91
SEC D/E	0.63	48
Males	1.63	125
Females	0.94	72
4-14 Yrs	0.74	57
15-24 Yrs	1.14	88
25-34 Yrs	1.40	107
35+ Yrs	1.74	133

Profile of audiences for ICC Cricket Cup		
Profiles	Avg.Rating	Index
CS 4+ Yrs	2.07	100
SEC A	2.27	109
SEC B	2.31	111
SEC C	2.32	112
SEC D/E	1.62	78
Males	2.47	119
Females	1.62	78
4-14 Yrs	1.67	80
15-24 Yrs	2.33	112
25-34 Yrs	1.87	90
35+ Yrs	2.32	112

SOURCE : TAM MEDIA RESEARCH

The above tables depict the skew of audiences that watched the FIFA World Cup as compared to the skew of audiences for the ICC Cricket. The average ratings of the Cable & Satellite audiences 4 years and above have been considered to be 100, and indices calculated for the subsequent target groups. The key points emerging from the analysis are as follows:

- Football viewing is skewed towards SEC A viewers indicating more upmarket viewers. Cricket has more mass appeal with audiences spread across the different strata.
- The viewership in both sports is Male-dominated.

- Though football attracts viewers aged 25 years and more, the highest skew is towards audiences aged 35 years and above. Cricket, on the other hand, attracts more audiences aged above 35 years, cricket viewership percolates to the younger audiences.

FIFA In a Nutshell

Implications for Broadcasters:

- As the FIFA Cup has shown us, distribution, one of the key elements of marketing mix, should be tackled adeptly.
- The share erosion of the viewers of Ten Sports by other foreign channels emphasises the synergistic relationship between the Broadcaster and the MSO's.
- Pricing for a broadcaster is a function of viewership. With the imminent emergence of CAS, pay channels will have to be more prudent to build a loyal base of audiences.

Implications for Advertisers:

- Emphasis on the quantum of advertising in a single event is extremely crucial. Too much exposure of a single brand on a high loyalty event like FIFA culminates into wastage.
- Bulk deals and high secondage buys on events like FIFA can be optimally utilised by advertisers that have multiple brands under their umbrella. This means that not only will the same viewers be exposed to the mother-brand but also the various sub-brands leading to advertising message being registered effectively.
- The fact that some of the markets were not enthused by the world cup at all demonstrates the clarity of prioritising the markets for the advertising activity. Example, Ahmedabad in the west and the interior markets in most of the South States did not show much response to the event.
- Apart from marketing, at the time of a deal, it is imperative for an advertiser to be aware of other elements of the channels marketing mix such as the channels distribution, pricing etc. as all this together would eventually effect viewership.
- This event had dispelled the belief that only prime time attracts audiences. This is evident by the dismal performance of the highlights of the matches. Strategic buying and scheduling is the mantra for future events.