

# Sporting Nation

IN THE MAKING VI



Properties

INDIA SPORTS SPONSORSHIP  
REPORT 2019

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# Foreword



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We, at ESP Properties (the Entertainment & Sports division of GroupM), are delighted to present to you our industry initiative, the sixth edition of the **"Sporting Nation in the Making"**

Our first edition had tracked the progress from 2008, which was a watershed year for sports in India with the IPL presenting a new business model. While the cricket league has been on a rising graph since inception, the same template has been embraced by other sports too. Enabling this was an eco-system of a billion sports lovers, entrepreneurs who helped in creation of these properties, talented athletes who have caught the imagination of the public, and businesses who see mileage for their brands through these associations.

On the back of a ten-year growth tale that saw overall sports sponsorship market crossing a billion dollars, 2018 was another year of resounding IPL success. The broadcast rights went to Star India at a staggering amount post which media rates saw a steep rise at this cricketing festival. The Central Sponsorships drove the property to newer heights with Vivo securing title sponsorship at whopping price which was an unbelievable 5.5 times from the previous deal. The Indian cricket team did not have a busy domestic calendar and with no major ICC tournaments being there, On Ground & Media Spends in cricket did face headwinds, which it overcame emphatically to dominate the sports scene yet again.

Other sports too had positive growth signals. The ISL (Indian Super League) over the years had grown into a strong property with a calendar spread over six months. The league for Kabaddi (PKL) continued the good run and the trajectory looks good for them. The Premier Badminton League was held successfully last year with a longer format that saw the addition of the Pune Franchise to the fold. Odisha hosted the Hockey World Cup last year; their support for the game along with the anticipated return of the HIL in a new format are optimistic signals.

Cricketers continued to shine in the endorsement space, as the biggest names in the sport dominated the

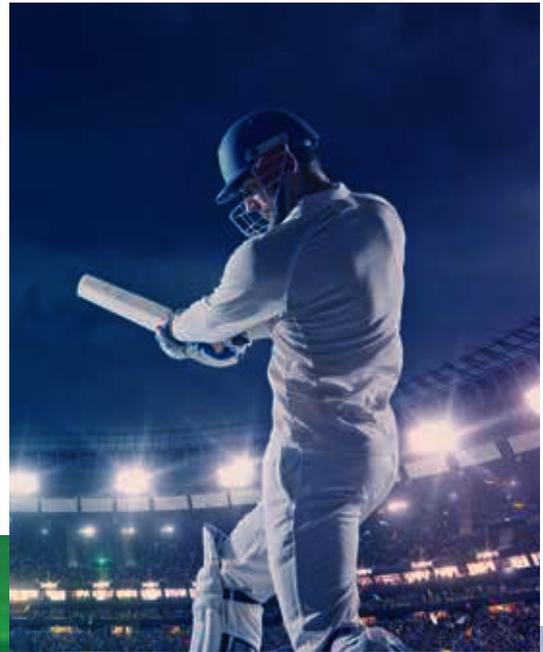
veritable Pareto. Virat and Dhoni alone accounted for 66% of overall endorsement value. While cricket is the biggest draw, it is not the only sport in India as proven by the endorsement success of athletes from other sports too. PV Sindhu and Saina Nehwal had a rally of their own making them the highest non-cricketing endorsers in Indian sports.

As regards media, print spends have been on the decline in sports and digital surpassed it in 2018, a year in which OTT gained significant ground. New media consumption trends are emerging as India warms up to the OTT revolution.

Overall sports sponsorship saw a solid growth as we saw more investments being made and more value being extracted by the brands.

The report covers the sports industry in 4 parts- Ground Sponsorship, Team Sponsorship & Franchise fee, Athlete Management and Media Spends. To provide a perspective, each chapter also covers key investment trends too. The report also captures the digital data (social conversations & search), and the On Air reach & TRPs in each of the leagues (IPL, ISL, PBL, PKL) to increase the utility to Rights Owners, Advertisers, and Agencies. Our report has looked at the events of last year from quantitative as well as qualitative perspectives, to give the stakeholders a clear elucidation of the ground realities as well as useful information that could be acted upon. We acknowledge with gratitude the valuable contributions provided by rights owners, agencies and industry participants who have equipped us with very useful insights and information to support us in preparing this report.

Our efforts have been guided by a resolve to give you a useful and informative report. We will be glad to receive feedback or suggestions that could enrich future editions of this report.



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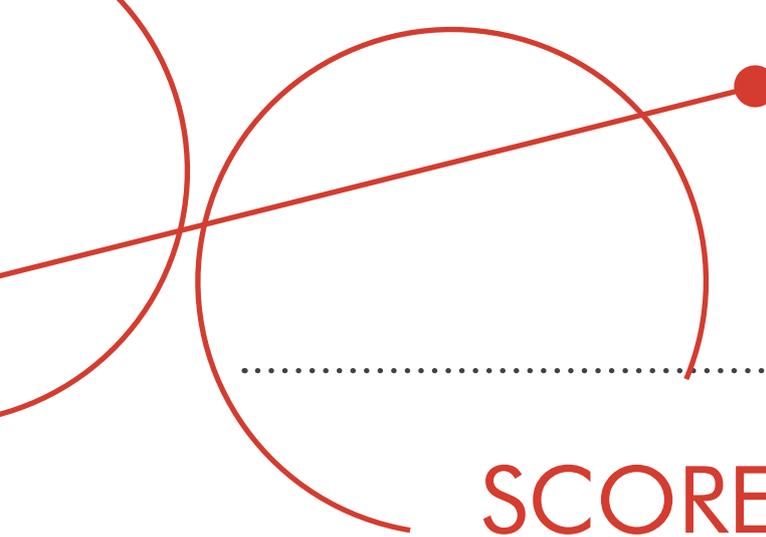
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opportunities



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**SCOREBOARD:**  
**Runs coming**  
**THICK AND FAST**  
**ON A GOOD**  
**batting wicket**

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It has been over a decade since cricket unleashed the powerhouse called the IPL and changed the business of sports in India forever. The growth story continued in 2018 also on the back of a solid performance across different areas of sports sponsorship. IPL continued to rake in big money with media spends reaching an all-time high as Star India procured media rights for the league at an astronomical figure. In spite of the absence of ICC events, cricket had a good year overall with India continuing its good run internationally. As regards athlete endorsements, King Kohli reigned supreme while cricketers dominated the scene; with non-cricketing stars also marking their strong presence.

ESP Properties Sports Sponsorship report looks at the business of sports from the angles of Ground Sponsorship, Team Sponsorship & Franchise Fee, Athlete Endorsement and the big one, Media Spends on sports properties. Our data does not consider Gate Receipts, Players Fee / Salary, Prize Money, Merchandising, Subscription, Sports Goods and Operational Cost.

If we break down the big picture into the focus areas, Ground Sponsorship grew at a strong 20% backed by a good show at the IPL while Team Sponsorship delivered 9% growth over 2017. There was a 22% growth in athlete endorsement while we had 9% more media spends than the previous year. With the IPL completing 10 years in 2017, the franchise fee, amounting to approximately INR 291 Cr (\$43Mn), ceased to be valid in 2018 rendering a y-o-y comparison irrelevant in that area. Netting off this anomaly, overall sports sponsorship gave a healthy growth of 12% last year.

IPL has been a key performance indicator for the business of sports in our country. Star India bagged the broadcast rights for the blue chip cricketing league from 2018 to 2022 at a staggering amount of INR 16347.50 Cr (\$2404Mn). While media rates saw a steep rise last year at this annual cricketing extravaganza, it did not deter brands from flocking to it as TV and cricket continued their winning partnership by scaling new heights. In terms of ground sponsorships too, the foremost sporting league in India contributed heavily last year with the Central Sponsorship value travelling up north with Vivo and other league partners playing significant roles. The IPL upswing propelled cricket to a growth of 34% in terms of on-ground spends in spite of the absence of a lucrative home calendar for the national team. 2018 also saw major growths in IPL team sponsorships, which crossed INR 300 Cr (\$44Mn) for the first time.

Whenever the FIFA World Cup happens, the share of mind for football skyrockets in India, with 2018 being no different. However when we look at the world's most popular sport from the point of view of business in India,

2018 was a year of de-growth. 2017 saw India hosting the FIFA U17 World Cup giving a big thrust to attendance in the stadium and the concomitant upsurge in on-ground sponsorship figures. The absence of a similar event in 2018 saw a major dip on that front. The year started with the tie-ups MRF had with certain EPL teams coming to an end leading to footballing team sponsorship figures going further south. Talking of another 11-a-side team sport, Hockey had given India unparalleled success on the world stage before the game started drifting away from the sub-continent. It was a matter of great excitement that India hosted the Hockey World Cup in 2018. Odisha played the role of the proud host as considerable excitement was generated. Further the Odisha Government announced

**Coming to Team India, the men in blue did not have a big tournament played in India in 2018; this coupled with the fact that the national team had only 11 home matches as against 34 in 2017 contributed to the overall numbers not reaching where they could have ended up, given the strong show put up by the IPL.**

a five-year sponsorship deal with Indian Hockey at approximately INR 150 Cr (\$22Mn). While these were encouraging signs for the game in India, the fact that the Hockey India League could not be held last year was a dampener for the game that once held the imagination of the public. Moving on to Badminton, it is a game that witnessed India becoming a force to reckon with in its own right. We have seen Indians make their mark at the highest level in the women's

game in a big way and also on the men's side to a considerable extent. The Premier Badminton League was held successfully last year with a longer format that saw the addition of the Pune Franchise to the fold. The Pro-Kabaddi League also saw success with significant ground sponsorship growth.

Hockey was not the only game that could not have a league out there in 2018. A successful property needs favorable market forces to begin with; only then can the other pieces of the jigsaw come into place. The Premier Futsal, Super Boxing League, Cue Slams and P1 Power Racing are events that could not be held last year. Needless to mention, there was negative impact on Ground Sponsorship, Team Sponsorship and Franchise Fee because of that.

Cricketers continue to wield major star power in this nation that is crazy about the game. While the number of athletes who got paid for endorsements grew disproportionately to the total money spent on them, a break up of this figure will show an exaggerated skew towards cricket. Virat Kohli, powered by his on-field exploits, continued to go from strength to strength as his brand endorsement kitty swelled to around INR 200 Cr (\$29Mn). M S Dhoni proved last year that there is still a lot of fight left in him, and along with that crossed the INR 100 Cr (\$15Mn) mark. Sachin Tendulkar was the third highest grossing sportsman in a year that saw some young cricketers also making their debut in the brand endorsement space. Virat and Dhoni alone accounted for 66% of overall endorsement value while cricketers accounted for 81% of the same kitty. The highest grossing non-cricketer, as well as the leading female sportsperson, was badminton player P V Sindhu who was India's silver lining at the Rio Olympics; closely following Sindhu in this list was Saina Nehwal, another athlete who brought lots of joy for India in the badminton world.

Cricket and IPL have been driving consumption of sports media and together they have created a huge market with lots of potential. The level of mass following that cricket enjoys and the understanding of the game that the average Indian has, are not matched by other sporting activities. The IPL juggernaut has been rolling on for a few years and with the rising popularity of India's biggest sporting league, media rates have also been on the up. Sony Pictures Network in 2017 in its last year as India broadcaster for IPL, as well as Star India who took over the rights from them in 2018, were instrumental in driving IPL media revenue upwards on the back of steep increase in rates. The attractiveness of the IPL as a media opportunity pulled many brands to be part of it even if it meant that they had to rationalize

their media investments in other sporting and non-sporting properties. Print media has been on the decline and 2018 marked the year in which digital ad spends surpassed print for the first time ever. 2018 also saw OTT gaining significant traction with Hotstar leading the way at the IPL and SonyLiv making its mark at the key overseas assignments for the Indian cricket team and the FIFA World Cup. The onslaught of digital media is expected to intensify as more and more of us will adopt newer technologies and embrace more convenient ways to watch our favorite sports programs.

In spite of a sparse domestic calendar for the Indian cricket team and the absence of marquee ICC events, 2018 witnessed a strong performance from India's favorite sport. The success of the IPL bears testimony to the depth of following cricket enjoys in India. In non-cricketing sporting events too, we had many inspiring success stories, with new stars being born. We are a sporting nation in the making, and 2018 had indeed played a key role in that journey.

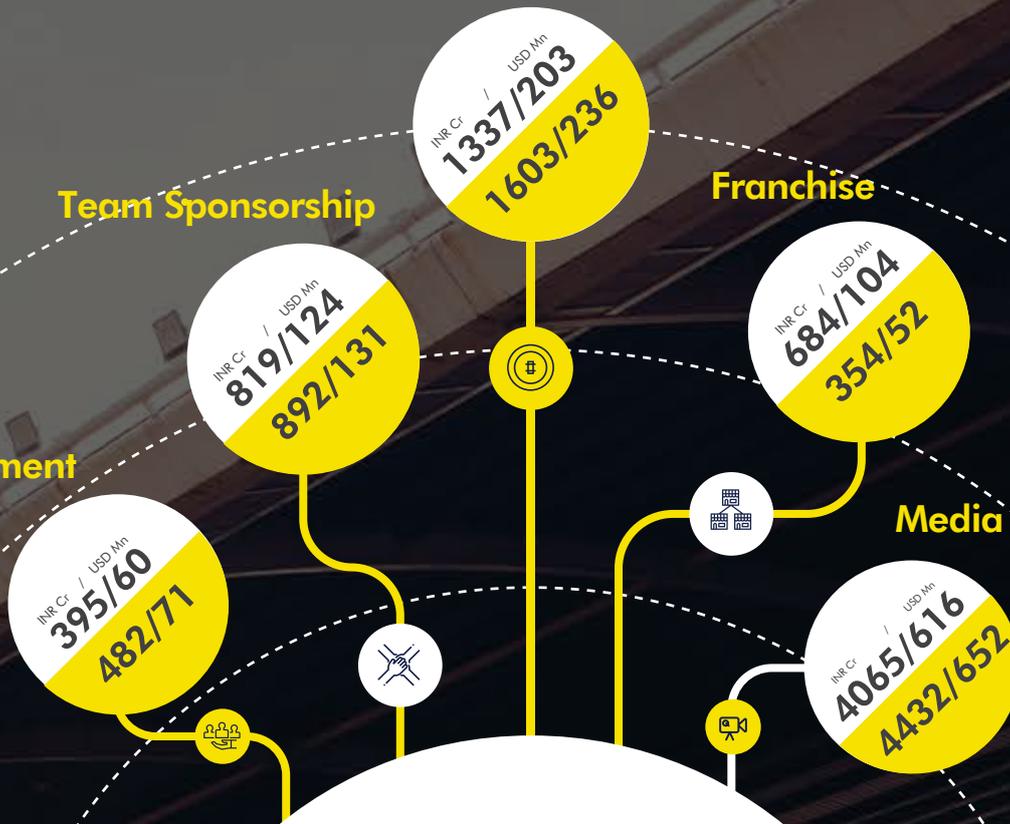
## Ground Sponsorship

## Team Sponsorship

## Franchise

## Endorsement

## Media Spends



# Sports Industry Data

### Total Industry Size

2017 (INR Cr)	2017 (USD Mn)	2018 (INR Cr)	2018 (USD Mn)
7300	1106	7762	1141



2017

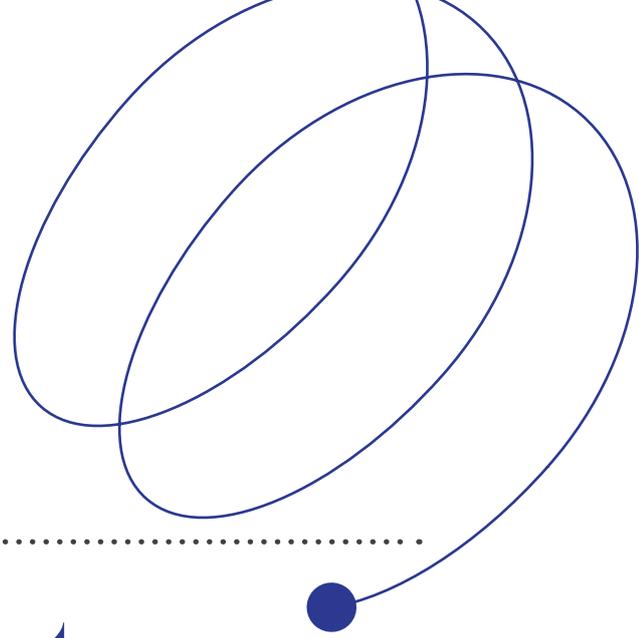


2018

Source – ESP Properties

2017 Conversion Rate 1\$ = Rs 66

2018 Conversion Rate 1\$ = Rs 68



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# Cricket

## GAINING GROUND

### as IPL hits

## A MAXIMUM

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Fuelled by IPL Central Contracts, cricket witnessed significant upsurge in 2018, jumping 6 percentage points to 56% share of the total on ground spends across all sports. While at an overall level the growth was 20%, cricket grew at almost twice that pace, at 34%. While Kabaddi upped the ante, Football declined from the 2017 levels that were bolstered by the U17 FIFA World Cup. Even as cricket continues its juggernaut, it was heartening to see some smaller leagues show promise.

## IPL- In a league of its own

2018 was the year in which India's foremost sports league, the IPL, saw major growths in Central Sponsorship values. Vivo secured the title sponsorship for 2018-2022 at a whopping INR 2199 Cr, (\$324Mn) which was an unbelievable 455% from the previous deal. While Vivo played the lead role, brands like Tata Motors, Future Group and Star India played their roles to perfection as Official Partners. In addition, it was payment time for Paytm in return for the Umpire Sponsorship rights while Ceat Tyres sponsored the ubiquitous Strategic Time Outs. At an overall level, IPL Central Sponsorship contributed to a revenue of more than INR 600+ Cr (\$88+ Mn) in 2018.

The IPL upswing more than compensated for the absence of blue-chip events in India for the men in blue. There were no ICC marquee events in 2018 and to make matters more challenging for the business of cricket; the Indian cricket team played only 11 home matches last year, as against 34 in 2017. The year also witnessed Indian brands investing in series away from home. While India clinched the Nidahas Trophy with a dramatic last ball six, also hitting the ball out of the park was Hero Moto Corp as the title sponsor, ably supported by other on-ground sponsors Amul, Syska, Prayag, Servo, Dalmia Cement, Wild Stone and Skoda. The Asia Cup held in UAE saw on-ground investments from BYJU'S, Skoda, Royal Stag, Haier, Dalmia Cement, Hero Moto Corp and NetMeds.

While the IPL was the vanguard for similar formats in other sports in India, it also inspired the creation of T20 leagues in other cricketing nations too. The fact that Hero Moto Corp continued its association with the Caribbean Premier League as the Title Sponsor bears testimony for the marketability of overseas cricketing events not only in local markets but also with the Indian fans of the game. 2018 also saw two domestic T20 leagues growing in stature. The Karnataka Premier League (KPL) in its 7th season took giant strides in TV viewership with Star Sports providing coverage in English as well as Kannada. The 3rd season of Tamil Nadu Premier League (TNPL) also showed that the event has a lot to look forward to in the future. The success of these domestic leagues bears testimony to the fact that cricket as a sport enjoys enough depth for even domestic properties to become viable; case in point being T20 Mumbai League.

## Foot on the gas or a tale of missed goals

The world's most popular team sport could not push the ball forward in 2018. Football dipped by INR 30 Cr (\$4.4Mn) in 2018 which was a de-growth of 17%. If this data doesn't seem to be following the run of play, then there is a reason for it! India had hosted the Under 17 FIFA World Cup in 2017 when the ground sponsorship amount it generated was a good INR 40 Cr (\$6.1Mn). This gap was difficult to bridge, as there was no other event of that magnitude last year. Hero Moto Corp strengthened its association with Indian Football by continuing to be the Title Sponsor for the ISL through an investment of around INR 50 Cr (\$7.4Mn). Other than the Title Sponsor, the ISL Central Sponsorship kitty got its much-needed fillip by participation from their other partners. Maruti and DHL were Associate Sponsors while Imperial Blue, Bisleri, SF Sonic Batteries, Britannia, Apollo Tyres, Nivea, Zeven and Dream 11 were the Official Partners of the ISL. It is worth mentioning here that football did deliver 17% more on ground revenue than it did in 2016. After all, it is not every year that you get to host a FIFA event!

## Grabbing opportunities, the Indian way

Kabaddi had a good year in 2018 registering an overall growth of 31% over the previous year. Vivo continued its association with the Pro Kabaddi as Title Sponsor. Starting 2017, Vivo had secured the title rights for PKL for INR 262 Cr (\$40Mn) for a period of five years. This was at a 100% incremental value from the right holder's previous ask. While the PKL was Powered by Thums Up, the brands that took on the role of Associate Sponsors were Bajaj Electricals, Tata Motors, Gillette, Dream 11, Honda and R R Kabel. The rights of Official Partners went to UltraTech Cement, Britannia, McDowell's No. 1 and HDFC. All these brands contributed to around INR 90 Cr (\$13Mn) to Central Sponsorship in PKL. This considering the fact that Pro Kabaddi, which was usually a July phenomenon, was moved to October in 2018 courtesy the Asian Games is no mean feat. Cricket no doubt has the biggest money spinner league, but the home-grown contact team sport has shown its potential by surging ahead of football yet again in terms of having the grounds covered.

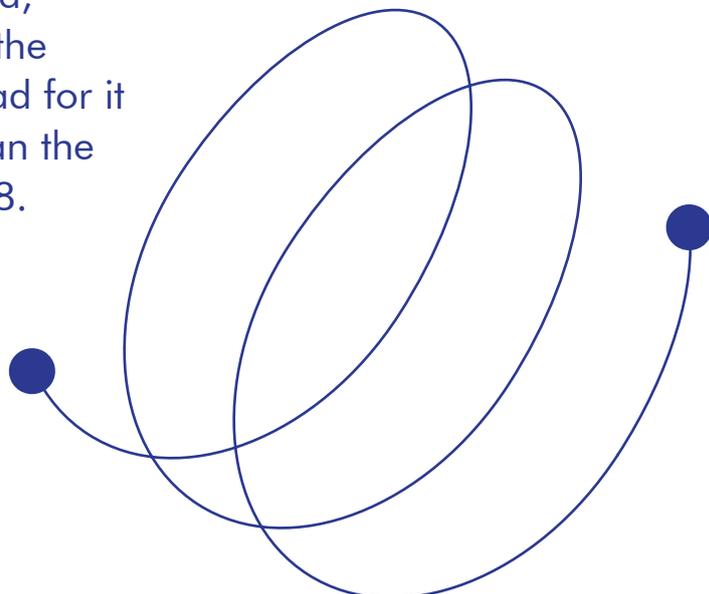
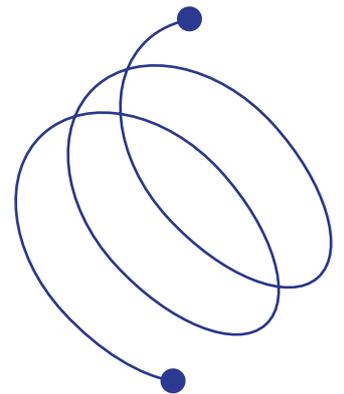
## Miles to go before the tape

Distance running is a trending activity in India that is influencing more and more of us towards a fitness conscious lifestyle. While, it did cross a significant landmark this year – breasting the INR 100 Cr (\$14.7Mn) tape for the first time, growth in this area was restricted to 8% over 2017 contrary to the disproportionate performance one might have envisaged. The enablers for this were the entry of new sponsors as well as increase in prices. Tata Sons had hit the ground running ever since it took over the title rights at the prestigious Mumbai Marathon. That's not all, the Tatas are determined to leave a strong footprint on the Indian Marathon scenario as is evident in the group's presence in other prominent running events in the country. The Title Sponsorship of Kolkata 25K was taken by Tata Steel and the 10K Run of the tech-city Bangalore was sponsored by the IT giant Tata Consultancy Services.

Airtel supported the Delhi Half Marathon while the Amity Group took on the title rights for the Gurugram Marathon. Banking on the growing popularity of long distance running in India, IDBI Federal Life Insurance threw in their hat by organizing Full Marathons in New Delhi and Kolkata and Half Marathon in maximum city - Mumbai. All things considered, Distance Running is here for the long run and the course ahead for it looks set for a faster pace than the growths we witnessed in 2018.

## Some drag even as you flick

Once the symbol of India's sporting glory, Hockey did face a major disappointment in 2018. The Hockey India League that started in 2013 could not be held in 2018 ostensibly because of a conflict of dates with another event; though financial viability to stake holders was also an issue. However, the silver lining to this debacle is that there is a clear promise that the event will be back in 2019; if that happens then 2018 could well just be the period of quiescence in what could turn out to be a typical 'hockey stick chart'. However, the hockey headline of 2018 is the fact that India had hosted the Hockey World Cup in 2018; the event was successfully held in Odisha with a total of approximately INR 20 Cr (\$2.9Mn) being invested by the National Sponsors Hero, BYJU'S, Dream 11, Odisha Tourism, Tata Steel and Sahara. The galleries were packed and great levels of excitement was generated amongst hockey lovers, but it gave a realization that what was at one point of time our golden sport, is now being played out on a smaller canvas.



## Emerging leagues – A mixed bag

India had enjoyed great success on the international scene in Badminton in recent years, hence public interest in the sport is on the up. The fourth season of the Premier Badminton League was held successfully with a longer schedule compared to the previous year. This edition saw Pune 7 Aces marking its entry as a new franchise into the PBL. In 2018 the league had 30 matches as against 18 in 2017. Vodafone continued to be the Title Sponsor for the event and paid extra for the additional matches. The league was Powered by Indian Oil and had Spice Jet, Bisleri and Red Bull as Official Partners. All these brands added around INR 10 -11 Cr (\$1.6Mn) to the league.

The second season of the Ultimate Table Tennis coincided with the World's largest sporting event - the FIFA World Cup. It had a leaner format this year and had Ceat continuing to be the Title Sponsor. Kellogg's was the Powered By Sponsor and along with Myntra, Servo and Stag, all these brands contributed INR 5-6 Cr (around \$0.8Mn). Fighting with these popular sports for public attention was the Pro-Wrestling League which had its 3rd edition in 2018. While the PWL enjoyed growths, The Super Fight League, however, happened without any major sponsorship support.

There was interesting development from the world of tennis with Pune getting an ATP 250 event- the Maharashtra Open Tennis Tournament. It was one of the preparatory tournaments for the Australian Open and Tata Sons gave its blessings to it as the Title Sponsor. 2018 also saw some golfing action too. The Indian Open was held successfully with Hero Moto Corp as the lead sponsor. The largest two- wheeler manufacturer in the world also supported the Women's Indian Open along with DLF, Castrol, Yes Bank, R&A, Asahi Glass, BMW, Calsberg and Ballantines. The PGTI Partners for 2018 were Incredible India, Rolex and WION.

Premier Futsal, which got kicked off amidst lot of fanfare in 2016, did not happen last year. The Super Boxing League, Cue Slam and the Procam supported P1 Power Racing were among the events that could not be held in 2018. It has been a decade since the inaugural IPL changed cricket for ever. While it changed the gentleman's game, it also showcased a business model that could be replicated in other sports as well. The growth curve that started with the IPL is still on the up and by all projections, will continue to be so. With 2019 having many important events in the sporting calendar, the view from the ground is brighter for the business of Indian sports.





Total			
2017 (INR Cr)	2017 (USD Mn)	2018 (INR Cr)	2018 (USD Mn)
1337	203	1603	236



Source – **ESP Properties**

2017 Conversion Rate **1\$ = Rs 66**    2018 Conversion Rate **1\$ = Rs 68**

- On Ground Sponsorship grew by 20%
- Cricket Sponsorship has grown by 34% - Growth in Indian Cricket has come on the back of new IPL deals, more than double the growth at Central Sponsorship
- Football sponsorship de-grown by 17% as there was no U17 FIFA World Cup in 2018
- Slow down in the Non-Cricket Leagues - Hockey India League, Premier Futsal, Super Boxing League, Cue Slam, P1 Power Racing didn't happen

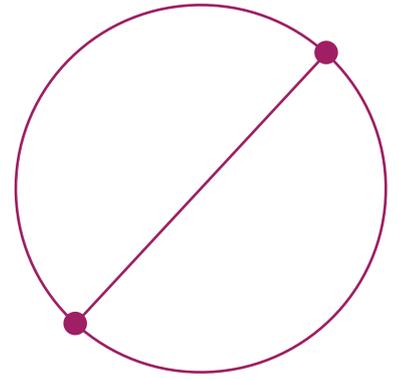
# Leagues



	Indian Premier League	Pro Kabaddi	Indian Super League	Premier Badminton League
TVR	3.0	1.0	0.3	0.0
Reach (in 000s)	414,359	296,786	127,730	132,901
Social Conversations	6,123,238	214,064	322,552	10,294
Search Volumes	174,718,340	5,265,600	11,591,000	271,600
Facebook	20,644,428	1,580,000	4,240,000	1,640,000
Twitter	6,700,000	279,000	668,000	50,300
Instagram	2,100,000	225,000	50,300	80,500

Source – GroupM. Source for TVR and Reach – BARC. TG – 2+, All NCCS, All India

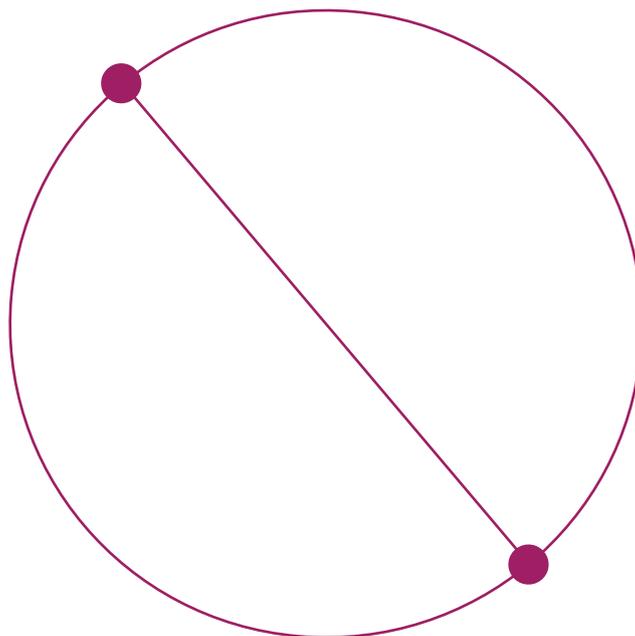
• ISL Data is till December 2018



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# CHANGING LANDSCAPE IN **Sports Ticketing**

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That India is a land where sports heroes are worshipped like their peers in cinema, is a fact well known! Over the past decade and more, we have been pushing the envelope on live sport, the way it is packaged and consumed, thus making our mark and competing with some of the biggest global sporting platforms.



**Albert Almeida,**  
COO - Live Entertainment,  
BookMyShow

The first wave of change in this landscape came with the country's most loved and viewed sport - Cricket! With the advent of the T20 format launched as the Indian Premier League in 2007, the sport has seen a huge buzz filling up stadia across the country as fans remain hungry for more.

The creation of the T20 model in a league format, similar to globally compelling leagues across soccer, basketball, etc and packaged with the relevant Indian and International flavour, caught the fancy of the entire country and much of the diaspora across the world, going onto change the cricketing landscape the world over. The 'live' spectacle of the league with the biggest players from all over the cricketing world, made for an even richer on-air experience for viewers everywhere.

As ticketing partners for IPL across several popular teams such as Mumbai Indians, Kolkata Knight Riders, Chennai Super Kings, Rajasthan Royals, to name a few, we at BookMyShow have seen the league grow its business over 100% in the last 9 years since our partnership in 2010. This growth came, despite venue capacity not really being augmented as much, but reflected largely through demand driving up average ticket prices.

The mind boggling success of the Indian Premier League along with a growing audience interest for other sports, thanks to India making its mark in many of these globally, set the stage for several leagues across other sports including Kabaddi, Football, Badminton, Volleyball and Marathons amongst others.

We see a growing appetite for sports consumption with an increase of almost 15% annually and we see this number growing as some of these newer sporting leagues pick up pace. The rising consumer demand in this ecosystem, has also seen big bucks coming in from sponsors looking for activation platforms they can own and build upon. Organisers are willing to invest across sports, to build large-scale league formats be it in Kabaddi, Football or Badminton.

For instance, the Premier Badminton League, as we have seen on BookMyShow, thanks to its international star power, including many Indian heroes has grown well over 50% on an average, each season across the past 4 seasons, thus showing a growing preference for the league across India.

Having worked closely and being a crucial partner to most of these emerging sporting genres' journey, we, at BookMyShow, have closely witnessed their evolution and transformation into big sporting experiences for Indian audiences. As the number of consumers for other sports like the Indian Super League, Pro-Kabaddi, Premier Badminton League, Pro-Wrestling League continue to grow, India is finally seeing a shift from being a one-sport nation to a multi-sport nation.

The advantage of being listed on a large ticketing platform like BookMyShow has also significantly boosted visibility for newer sporting genres looking to capture significant audience mindshare that eventually results in strong ticket sales.

BookMyShow, with over 200 million visits each month, has been able to drive salience for these properties among relevant audience segments thereby aiding the adoption and demand for these sporting genres. We are committed to working alongside these leagues as partners to make them truly loved and building other formidable sport platforms for audiences and brands beyond cricket.

Our valuable association with Live sporting events, our journey with them over the years - ticketing for and working as partners with most of them and the big one in IPL in 2010 meant that BookMyShow had enough learnings to replicate across other sports and scale newer leagues, not just as a ticketing platform but also



on activations on-ground and execution for them. This has also given us the confidence to work at executing famed and key sporting IPs such as WWE or the NBA which will make its India debut with its first ever pre-season game here in India in 2019.

As producers, promoters or ticketing partners we always strive to achieve a seamless end-to-end consumer experience but we have faced numerous challenges be it with lack of suitable venues or infrastructure. On our part, we have been innovating on several aspects right from ticketing, to on-ground execution as we continue to address the gaps, to the best of our ability while we look to scale this genre in India and bring it at par with global standards.



A key challenge in hosting and ticketing sporting events in India has been the limitation with regard to appropriate venues or the capacity of existing stadia outside of cricket, in India. We hardly have any enclosed arenas that can accommodate between 8,000-10,000 people for a world-class event like the NBA with most stadia typically able to hold only upto 3,000-3,500 people.

Promoting and marketing efforts of the newer leagues across sporting genres is leading to growing numbers with ingress management continuing to be a complex and calculative task for such events, in the country. In a bid to trim long entry lines and lengthy security procedures, BookMyShow has attempted to constantly innovate upon on-ground solutions, be it via reduced human intervention by way of physical barriers such as turnstiles or technologically advanced scanners for handhelds to ease the customer experience as they gear up to watch their favourite match live.

Consumer data accumulated over the years has shown the impact of such solutions coupled with software built in-house, in providing a seamless journey for the customer at various touch points right from the time he/she books online to the time he gets served at the box office and the experience, once he/she is in the arena.

Basis our learnings on-ground, the single most crucial challenge remains the poor quality of in-stadia services which results in a broken consumer experience that does not augur well when one is trying to build an appetite for Live Sport and make it a competitive and compelling entertainment option for Indian audiences. We continue to work with key industry partners to address and solve for these, to help sustain future demand for these newer sporting genres that include new entrants like e-gaming, football, kabaddi and basketball, to name a few. Across the industry, as also on BookMyShow, the e-gaming genre in particular, is finding favour and is expected to grow manifold over the next couple of years.

We are at a crucial juncture in the country's sporting landscape as lesser practiced sports such as Golf, Table Tennis, Cycling, Running are all spiking interest amongst young sport enthusiasts with more and more users willing to consume such events. At BookMyShow, we are super charged as we root for India's sporting wave on its home run!



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# THE **big money** LEAGUE **consolidates** **the innings,** IN THE FACE OF THE TEN 10-YEAR CHALLENGE

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Cricket leads the charge in team sponsorships with a steady performance. The IPL sets the pace as Team India chips in with a supporting knock. However, football dips significantly, leading to a below par growth for the sporting nation at an overall level. With the annual franchise fee for the IPL no longer payable after completion of 10 years, we saw the concomitant drop on that front.

2018 saw Team Sponsorships growing at only 9%. Cricket, which had accounted for 63% of team sponsorship amounts in 2017, rose to 68% in contribution last year. 2018 was the year for Chinese smartphone brands, much like the year before that, as Oppo continued its Team India sponsorship by pumping in its Annual share of INR 1079 Cr (\$158Mn) as part of its deal till 2022. Other than the electronics major, another brand that just did it when it came to continuing its association with team India was Nike. The Indian national men's cricket team played 50 matches last year, slightly lower than the 54 they had in 2017; this led to a sponsorship tally that is just marginally higher than previous year. The IPL Team Sponsorship tally had a better year, touching INR 300 Cr (\$44Mn) for the first time ever. This performance, given the scale of the league and the increment it delivered, makes it the growth champion for Team Sponsorships in Indian Sports in 2018. India's most popular sport grew at a solid 16% over last year.

The IPL Team Sponsorship figures got a shot in the arm with the return of two successful teams which had to sit out for two years -Chennai Super Kings (CSK) and Rajasthan Royals (RR) came back to India's foremost sporting league in lieu of Gujarat Lions and Rising Pune Supergiants. The front jersey sponsorships played the pinch-hitter's role to perfection in the league in 2018. Between the Muthoot Group, the Korean Electronics Giant Samsung and the newbie Eros Now – The big 3 of IPL i.e., CSK, MI & RCB clocked 22% of the team sponsorship pie through the front jersey sponsorship alone.

While cricket is a national obsession in India, footballing action around the world has been gaining in viewership in our country in recent years. The English Premier League has a fan base in India, as it is the most watched of all the European and South American soccer action here. As a result, Indian brands have been investing in EPL teams. In 2015 Wipro had signed a deal with Chelsea to support them with technology-based solutions; a tie-up that came to an end in 2017. Add to it, the one-year contracts MRF had with West Ham, Newcastle and West Bromwich in the previous year were not there in 2018-19 season, leading to a major drop in overall sponsorship figures. On a more positive note, Apollo Tyres, HCL and Gulf Oil continued to associate

with Manchester United. However, this did not improve the picture much, as Football de-grew by 22% in 2018.

While the absence of Hockey India League was a major setback for the game that was once the numero uno in Indian sports, the national team got a fillip with India hosting the premier hockey event, the World Cup 2018. Throwing its weight behind the sport was the Odisha Government that announced a five-year deal with Hockey India that would replace the association of Sahara as the sponsors of the National Hockey team. This sponsorship covers all national teams - junior and, men and women; and is estimated to be around INR 150 Cr (\$22.1Mn).

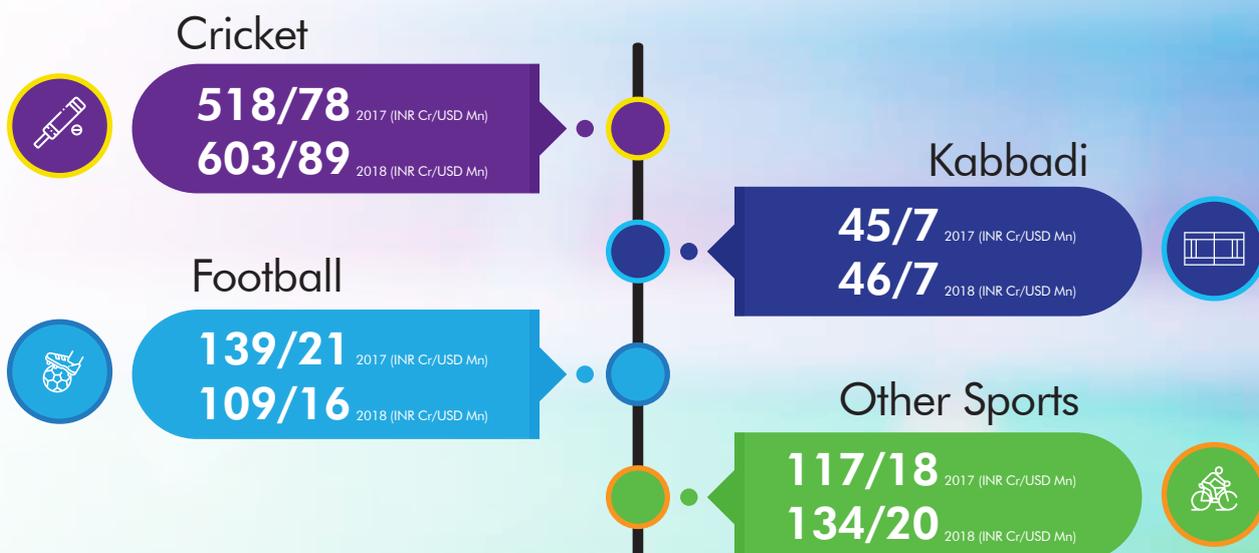
Talking of other sporting events, in a welcome move for wrestling, Tata Motors became the principal sponsor of Indian wrestling in a deal worth INR 18 Cr (\$2.6Mn) for 3 years. 2018 was the year of the quadrennial Commonwealth Games and Asian Games, for which the IOA was able to successfully sign deals with Edelweiss, Li-Ning, Amul, Nippon Paints, Motul, Borosil and Raymond as National Sponsors-cumulatively contributing approximately INR 18 Cr (\$2.6Mn).

The newer leagues did not have any noticeable change in the franchise fee. Indian Super League continued to have 10 teams and Pro Kabaddi continued to have 12 teams; the Franchise Fee remaining the same in both the cases. There was no change in Ultimate Table Tennis with 6 teams, Pro-Wrestling League with 6 teams and Super Fight League with 8 teams. Pune 7 Aces got added to Premier Badminton League making it nine teams in all in the competition, not to mention the slight increment in the franchise fee amounts too.

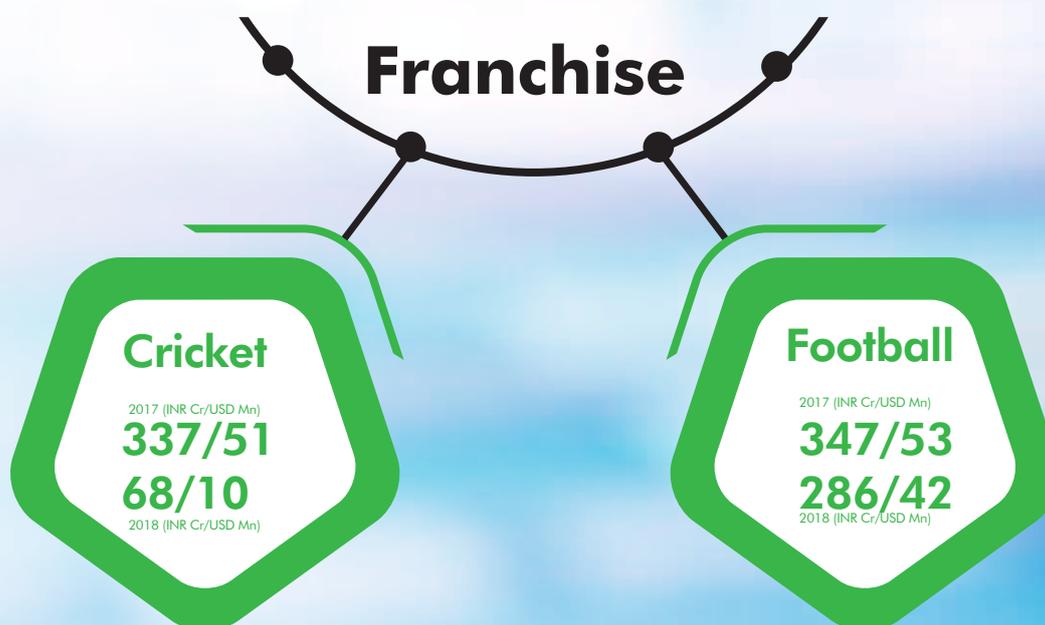
Hockey India League, Premier Futsal, Super Boxing League, Cue Slam and P1 Power Racing are some of the events that started with much optimism but failed to live up to the promise they showed initially. These competitions could not be held in 2018 and needless to mention, they did disturb the sports business scoreboard as well. The de-growth in Franchise Fee figures for 2018 emphasizes the fact that If the big daddy of Indian sports sneezes, then the sporting nation will indeed catch a cold.

**Economics of Franchise-based sporting events truly arrived in Indian sports with the advent of IPL in 2008. As per the terms, Annual Franchise Fee was payable for a period of 10 years; hence they were not paid in 2018. This led to a staggering de-growth of 80% in cricket. The overall Franchise Fee in 2018 shrunk to almost half the 2017 figures with a decline of 48%.**

# Team Sponsorship & Franchise Fee



Total			
2017 (INR Cr)	2017 (USD Mn)	2018 (INR Cr)	2018 (USD Mn)
819	124	892	131



Total			
2017 (INR Cr)	2017 (USD Mn)	2018 (INR Cr)	2018 (USD Mn)
684	104	354	52

Source – ESP Properties

2017 Conversion Rate 1\$ = Rs 66    2018 Conversion Rate 1\$ = Rs 68



- Team Sponsorship grew by 9%
- Cricket Team Sponsorship has grown by 16%
  - IPL Team Sponsorship had shown a growth of 20% touching INR 300 Cr (\$44Mn) Cumulatively for the first time
- Non Cricket Team Sponsorship growth was plateaued
  - Football de-grown by 22%. Major dip was due to Wipro – Chelsea and MRF - West Brom, New Castle, West Ham deals got over
  - Odisha government announced a five-year deal with Hockey India for junior, men and women
  - Tata Motors became principal sponsor of Indian wrestling
- Major dip in Franchise by 48%
- Cricket Franchise de-grown by 80% as the IPL Franchise Fee were applicable for first 10 years
- Hockey India League, Premier Futsal, Super Boxing League, Cue Slam, P1 Power Racing didn't happen. Impacted the Franchise Fee

# IPL Franchises



	Chennai Super Kings	Mumbai Indians	Royal Challengers Bangalore	Kolkata Knight Riders
TVR	3.6	3.2	3.1	3.0
Reach (in 000s)	337,349	302,606	299,752	310,108
Social Conversations	1,226,490	979,305	603,285	443,313
Search Volumes	3,022,500	5,611,600	2,940,500	2,614,600
Facebook	12,200,000	13,000,000	9,242,000	16,000,000
Twitter	4,540,000	4,970,000	3,350,000	4,120,000
Instagram	1,800,000	2,300,000	2,100,000	872,000
	Sunrisers Hyderabad	Kings XI Punjab	Delhi Daredevils	Rajasthan Royals
TVR	3.2	2.9	2.7	2.6
Reach (in 000s)	334,393	293,382	293,919	295,080
Social Conversations	292,018	420,977	818,433	739,988
Search Volumes	2,248,000	1,750,400	1,502,900	1,140,300
Facebook	5,900,000	8,600,000	4,600,000	4,100,000
Twitter	2,020,000	1,910,000	1,320,000	1,090,000
Instagram	775,000	772,000	558,000	423,000

Source – GroupM. Source for TVR and Reach – BARC. TG – 2+, All NCCS, All India

- Search volumes & social media following clearly demarcates the BIG 4 IPL franchises namely CSK, MI, RCB & KKR
- While SRH dethroned KKR in the BIG 4 when it comes to TVR courtesy TOP 2 finish during the '18 season, teams like MI & RCB couldn't draw in viewers on-air thanks to their sub-par on-field performance
- DD & RR generated a lot of social chatter during the '18 season & the reason for the same seem to hover around players like Gautam Gambhir stepping down from captaincy of DD & Ajinkya Rahane taking over RR from Steve Smith in the midst of ball-tampering controversy

# PKL Franchises



	Patna Pirates	U Mumba	Jaipur Pink Panthers	Bengaluru Bulls	Telugu Titans	Tamil Thalaivas
TVR	1.1	1.1	1.0	1.1	1.1	1.0
Reach (in 000s)	178,685	204,667	184,405	162,731	174,757	163,133
Social Conversations	50,083	25,808	15,611	30,314	14,191	46,141
Search Volumes	1,053,700	811,100	1,020,190	1,009,800	1,043,200	537,500
Facebook	681,000	1,050,000	784,000	852,000	526,000	276,000
Twitter	581,000	127,000	124,000	154,000	141,000	83,700
Instagram	133,000	127,400	86,200	125,000	63,900	46,600

	Gujarat Fortune Giants	Bengal Warriors	Puneri Paltan	Dabang Delhi	UP Yoddha	Haryana Steelers
TVR	1.0	1.0	1.0	1.0	1.0	1.0
Reach (in 000s)	178,878	189,755	166,669	171,262	160,479	169,032
Social Conversations	10,254	22,244	29,224	12,699	23,369	25,552
Search Volumes	526,470	458,200	393,400	302,480	298,240	227,950
Facebook	366,000	742,000	925,000	1,100,000	364,000	348,000
Twitter	21,900	74,800	107,000	55,500	20,700	22,000
Instagram	74,500	65,700	84,800	59,600	47,500	58,600

Source – GroupM. Source for TVR and Reach – BARC. TG – 2+, All NCCS, All India

- Traditional favorites Patna Pirates & Telugu Titans racked in eyeballs on-air despite their sub-optimal on-field performance
- While Dabang Delhi & UP Yoddha raided into the Playoffs, their on-air performance was sub-par. In fact, UP Yoddha finished at the bottom of the table in terms of on-air reach (in 000s) followed by eventual champions Bengaluru Bulls
- Interestingly, a lot of fans searched online about their favorite teams i.e. Patna Pirates, Bengaluru Bulls, Jaipur Pink Panthers & Telugu Titans. The avg. search volumes for these 4 teams was well past 1M mark through the season



# ISL Franchises



	Kerala Blasters Football Club	Bengaluru Football Club	Chennaiyin Football Club	ATK	Goa Football Club
TVR	0.4	0.3	0.3	0.3	0.3
Reach (in 000s)	60,792	53,869	54,901	58,414	54,226
Social Conversations	62,585	191,241	204,820	23,305	24,582
Search Volumes	3,170,000	705,400	659,300	99,600	746,700
Facebook	1,110,000	333,000	463,000	1,100,000	446,000
Twitter	1,830,000	249,000	857,000	463,000	324,000
Instagram	851,000	135,000	170,000	145,000	141,000

	Pune City Football Club	Mumbai City Football Club	Delhi Dynamos Football Club	North East United Football Club	Jamshedpur Football Club
TVR	0.3	0.3	0.2	0.3	0.3
Reach (in 000s)	53,620	55,827	51,237	56,587	57,006
Social Conversations	19,722	64,778	13,554	18,010	73,965
Search Volumes	191,900	189,200	149,400	245,800	247,500
Facebook	982,000	584,000	634,000	319,000	98,900
Twitter	150,000	159,000	124,000	422,000	14,500
Instagram	98,500	95,000	69,500	109,000	63,700

Source – GroupM. Source for TVR and Reach – BARC. TG – 2+, All NCCS, All India

- While the avg. TVR for a PKL team is head and shoulders above the avg. TVR for an ISL franchise; when it comes to social conversations, an ISL team generates on an avg. 2.4 times more chatter than its counterpart in PKL
- When it comes to digital, ISL franchises down south have mastered the recipe with CFC leading the charts in terms of social chatter and KBFC sitting on top of the table generating almost 9x more search volumes than its peers in the ISL fraternity
- The 2-time runners-up of ISL seems to have cracked the code on social media; dominating the table in terms of followers on Facebook, Twitter and Instagram. Such is KBFC's aura on social media that the franchise has on an avg. 6x more followers on Twitter & 7.5x more followers on Instagram than the rest of the ISL teams
- ISL Data is till December 2018

# PBL Franchises



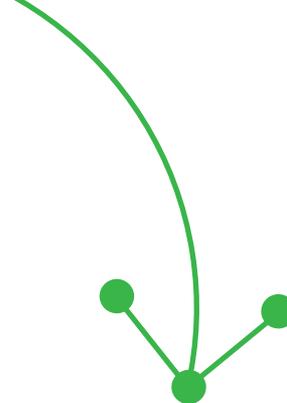
	Awadhe Warriors	Ahmedabad Smash Masters	Chennai Smashers	Hyderabad Hunters	Mumbai Rockets
TVR	0.0	0.0	0.0	0.0	0.0
Reach (in 000s)	47,867	44,695	42,099	50,070	51,919
Social Conversations	1,429	1,628	1,995	4,117	1,914
Search Volumes	5,620	2,290	8,900	11,160	2,990
Facebook	30,766	64,000	6,738	49,000	15,080
Twitter	992	826	6,664	5,704	554
Instagram	N/A	1,424	858	4,320	442

	Bengaluru Blasters	North Eastern Warriors	Delhi Dashers	Pune 7 Aces
TVR	0.0	0.0	0.0	0.0
Reach (in 000s)	48,585	41,629	45,344	48,750
Social Conversations	3,088	1,571	1,603	4,376
Search Volumes	1,020	0	0	0
Facebook	32,969	5,719	323	571
Twitter	549	385	142	468
Instagram	N/A	3	23	4,677

Source – GroupM. Source for TVR and Reach – BARC. TG – 2+, All NCCS, All India

- For a league which is substantially shorter in terms of duration; a PBL franchise on an avg. clocked in approx. 84% of the on-air reach in comparison to its counterpart in ISL
- New entrant i.e. Pune 7 Aces racked in on-air eyeballs & finished 3rd on the table in terms of reach (in 000s) courtesy on-court exploits of their star player Caroline Marin and off-court presence of their star owner Tapsee Pannu
- Just like in ISL, in PBL too franchises down south have established their dominance in digital media. In 2018, Hyderabad Hunters generated digital search queries to the tune of 11K which is at par with the total search volumes of Awadhe Warriors, Mumbai Rockets, Ahmedabad Smash Masters and Bengaluru Bulls combined



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# **Big money** CONTINUES TO CHASE **the king of chases** **as cricket** WIDENS THE LEAD OVER THE REST OF SPORTS

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Brand Virat continued the juggernaut in a year that saw cricket stars endorse significantly higher number of brands whilst other sports had only a slight growth over the previous year. M S Dhoni rediscovered his tricks with the willow as he added more brands to his kitty. While Sachin still sells, two shuttlers showed us that you don't have to be cricketer to be a star in this sporting nation.

2018 saw a 22% growth in Athlete Brand Endorsement Value. Of the INR 482 Cr (\$71Mn) spent by brands on sports stars acquisitions, 81% was accounted just by India's most popular sport. Two cricketers alone, Virat Kohli and M S Dhoni, pulled in 66% of all athlete endorsement monies spent by Indian brands last year. As many as 133 brands had signed with cricketers for 2018, this was against a figure of 90 brands in 2017. If we look at other sports, 86 brands had signed up with non-cricketing stars in comparison with 78 in the previous year. Appearances and social influencer activities are at an all-time high for athletes; brands are increasingly showing an inclination to use them sporadically for campaigns whenever they find the right mix of brand fit and cost leading to new revenue streams getting opened up for smaller athletes. 2018 also saw a trend of smaller and regional brands opting for smaller sportspersons. Cricket also happened to witness the coming of age of a few young talents. A combination of these factors did play a role in a significantly higher number of brands opting for star endorsements even though the ratio of endorsement value to the number of brands being endorsed has come down versus 2017.

Cricket grew by 21% in endorsements. Like in many a successful run chase, two men played a key role in taking 2018 past previous year's figures. The man who is widely considered the best batsman in the world at the moment, not surprisingly, continues to be the biggest draw by quite a distance. As he does on the field, Virat Kohli leads from the front touching an endorsement value of approximately INR 200 Cr (\$29Mn) and while doing so, he has successfully managed to bag a few firsts in his kitty as well. In February of 2017; Virat Kohli became the only Indian celebrity with an INR 100 Cr (\$15Mn) endorsement deal with a single brand; he furthered his solitude in 2018 by becoming the 1st sportsperson to co-own a retail brand, namely One8, with INR 100 Cr (\$15Mn) annual sale. It's hardly surprising that King Kohli and his athleisure Brand One8 is mirroring his great run on-field by foraying into

In a cricket crazy country that has seen a lot of success in the game in recent years, it may strike as a surprise to the uninitiated, that the player with the third highest endorsement value is someone who had retired from the game in 2012. But, if the player happens to be Sachin Tendulkar, then things tend to work differently

business other than sneakers – fragrances, formal footwear, accessories and the list continues. With Brand One8, Virat Kohli has joined the elite group of international sporting icons like Roger Federer (RF) and Cristiano Ronaldo (CR7) who have successfully rolled out their own brands. Leveraging the Virat bandwagon are a wide array of brands from different business sectors; they include well-known names like Puma, Boost, MRF, Royal Challenge, Oakley, Vicks, Manyavar, Tissot, Audi, Shyam Steel, Colgate, Nitesh Estates, Herbalife, Punjab National Bank, Cinthol, Valvoline, Samsonite, Amaze Batteries, Muve Acoustics, TooYum, Hero Moto Corp, Remit 2 India, and Philips. Even as Virat continued to plunder runs and made brands flock to him, his predecessor as the Indian skipper M S Dhoni

turned back a few years at the IPL when he went back to his yellow CSK jersey. As he led his franchise to the title triumph, we also got to see Dhoni 2.0 with the bat. Not surprisingly, he added twelve brands to his kitty and became the second Indian sportsman to hit a century in the endorsement game in 2018, crossing the INR 100 Cr (\$15Mn) mark. Brands endorsed by Dhoni in 2018 include Gulf Oil, TVS Motors, Orient Fans, Lava Mobiles, Grand Midwest Group, McDowell's No 1,

Revital, Spartan, Exide Insurance, Amity University, Zed Black, Dabur Chyawanprash, Sumadhura Group, Panerai, LivFast, Bharat Matrimony, Go Daddy, MasterCard, NetMeds, WardWiz, SRMB, Soundlogic, Dream XI and Star Sports.

The original batting maestro - Sachin Tendulkar continued to be the darling of the advertising world as he held fort with over INR 40 Cr (\$6Mn) worth of endorsement in 2018. The 10 brands he powered last year were UNICEF, BMW, Luminous, Smartron, GM Pens, Aster Pharmacy, DBS Bank, Sony Ten, Smash and Quaker. While the other well-known faces in the Indian cricket team had their share of the endorsement pie, we must mention that fame did follow success for Bhuvaneshwar Kumar, Jasprit Bumrah and Rishabh Pant as they made their debut in the advertising arena.

With Kohli and Dhoni accounting for two-third of all athlete endorsement in 2018 and other cricketers making up one-sixth, where is the other one-sixth coming from? A good part of it is linked with two badminton players who put India firmly on the world map on the distaff side. PV Sindhu and Saina Nehwal had a rally of their own making them the highest non-cricketing endorsers in Indian sports. Pularla Sindhu had a momentous 2018 both on and off the court; while she ended 2018 with creating history by becoming the 1st Indian to win the season-ending BWF World Tour Finals; she topped the leaderboard here too with 11 brands and over INR 35 Cr (\$5.1Mn) worth of endorsements. As she smashed her way to the top, the brands that benefitted were Vizag Steel, APIS Honey, Bank of Baroda, CRPF, Yonex, Myntra, Panasonic, Gatorade, Moov, Bridgestone and Stayfree. Nehwal on the other hand finished 2018 on a personal high as she married fellow shuttler P Kashyap in December 2018.



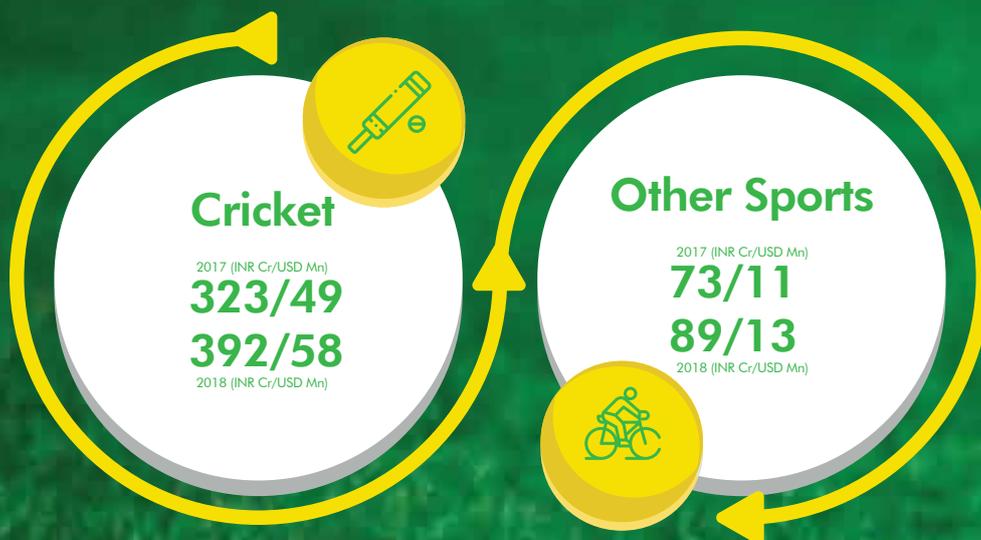
The CWG 2018 Gold Medalist endorsed 7 brands – Edelweiss, Herbalife, Sahara, ITC, Yonex, Fortune Oil and Rasna. While we had cricketers entering the brand endorsement phase of their careers this year, the same happened to Hima Das in the non-cricketing space. The 400m National Record holder made India proud at the IAAF World Under 20 Championships by winning a Gold Medal, catching the attention of sports lovers and media alike. She made her brand endorsement debut in 2018 and now has 4 brands with her – Edelweiss, Adidas, UNICEF and SBI YONO.

The non-cricketing brand endorsement value shoots up when an Indian business with global outlook ties up

world famous stars in their sport, as was the case with the high profile signings of Tiger Woods by Hero Moto Corp and of Lionel Messi by Tata Motors. With both the deals coming to an end we saw a much smaller endorsement pie for the non-cricketing world in 2017; this continued to be case in 2018 also. Even as cricketers accelerated their scoring rate, it was heartening to see a few athletes from other sporting disciplines making their mark too. Women athletes have been doing well for India on the world stage and the endorsement value they command bears testimony to the fact that there is a market for diverse sporting interests in this country.



# Endorsement



Total			
2017 (INR Cr)	2017 (USD Mn)	2018 (INR Cr)	2018 (USD Mn)
396	60	482	71

Source – **ESP Properties**

2017 Conversion Rate **1\$ = Rs 66**    2018 Conversion Rate **1\$ = Rs 68**

- 22% growth in Athlete brand endorsements
- 81% of Total Brand Endorsements have come from Cricketers
- 66% of Total Brand Endorsements are from Virat Kohli & MS Dhoni
- 133 Brands signed up with Cricketers
- 86 Brands signed up with Non-Cricket Athletes

# Athlete



	Virat Kohli	M S Dhoni	Sachin Tendulkar	Rohit Sharma	Hardik Pandya
Social Conversations	6,820,200	4,858,500	2,971,900	2,409,400	683,400
Search Volumes	18,190,000	8,985,000	4,168,000	7,483,000	3,119,000
Facebook	37,200,000	20,600,000	28,900,000	10,000,000	3,300,000
Twitter	28,800,000	7,210,000	28,400,000	1,380,000	3,120,000
Instagram	30,000,000	11,900,000	13,100,000	8,000,000	4,800,000

	Ravichandran Ashwin	P V Sindhu	Saina Nehwal	Sunil Chhetri	Srikanth Kidambi
Social Conversations	301,700	447,800	604,100	552,600	99,800
Search Volumes	669,400	1,448,000	2,158,000	748,200	159,100
Facebook	2,600,000	1,300,000	8,000,000	5,844,000	93,000
Twitter	9,310,000	2,600,000	8,250,000	1,550,000	1,140,000
Instagram	1,600,000	1,200,000	1,300,000	824,000	128,000

Source – GroupM.



# Digital viewing LANDSCAPE & TRENDS Cricket vs Non-Cricket



Here, I must also say how digital streaming has shifted fortunes for multi-sport events in India. Last year, we had two of the biggest multi-sport events- 2018 Commonwealth Games & 2018 Asian Games which garnered a combined viewership of over 30 million. With 14 hours of daily content, 6 simultaneous feeds and 18 disciplines, SonyLIV ushered in a new generation of fans and tapped their widening interest for multi sports.



**Uday Sodhi,**  
Business Head - Digital  
Sony Pictures Networks India Pvt. Ltd.

"I have seen God, he bats at no. 4 for India" - Australian cricketer Mathew Hayden had once said this about our very own Sachin Tendulkar. In hindsight, I believe this underscores the footprint cricket has had in the sports ecosystem. As on today, India's recent Australia tour that went live on SonyLIV emerged as the most watched overseas cricket series for any digital platform in the country with a whopping count of over 50 million viewers.

So, to say, that cricket is the most popular sport on web, isn't an understatement. Improved connectivity and smart phone penetration has altered sports consumption patterns in India and cricket continues to lead this change. With almost 3,000-4,000 live games every year spread across cricket, football, tennis, fight sports, basketball etc, sports content is SonyLIV's most potential consumption driver. Interestingly, cricket leads this pack with over 70% contribution to viewership.

In the last two years we had 4 landmark overseas series namely, India Tour of Sri Lanka, India Tour of South Africa, India Tour of England & India Tour of Australia which collectively accounted for a 5X jump in the time spent. While the South Africa tour was watched by 25 million people, the England tour fetched 30 million followed by the highest ever 50 million digital viewers for the India-Australia series.



But there's more to this story. Over the last few years, we at SonyLIV have been able to bring mainstream attention to other sporting events like Football, Basketball and Tennis. From bringing the biggest of international tournaments to curating impactful consumer engagement campaigns, we have garnered sizeable interest for 'Non-cricket' sports in the country.

Football takes the lead in this category with an organic growth of 4X on SonyLIV. FIFA 2018 was a path breaking tournament that clocked landmark 70 million viewers, the highest-ever football viewership in India. Not only was this a huge feat in a nation of cricket lovers, the tournament went onto break significant records in live sports streaming. Rise of female audience was a remarkable high who contributed to 17% of the viewership and were as hooked onto the game as much as their male counterparts.

Our 6 multi-audio streams in regional languages like Hindi, English, Bengali, Malayalam, Tamil and Telugu worked for the consumers who poured in large numbers from metros like Kolkata, Cochin and even smaller cities like Ahmedabad, Lucknow, Pune and Jaipur. This re-instated the fact that sporting events like FIFA are popular across geographies and should be experimented with.

Basketball follows in line next. Despite not being as massy a sport as football or cricket, digital trends reflect a rising viewership for basketball. Over the last year, we witnessed a 1.6X jump in viewers and a 7X jump in time spent on the sport with 80% of the target audience being youngsters and professionals within the age bracket of 18-35. Though male audience dominates the category accounting for 90% views, indications of a rising female viewership is on the radar.

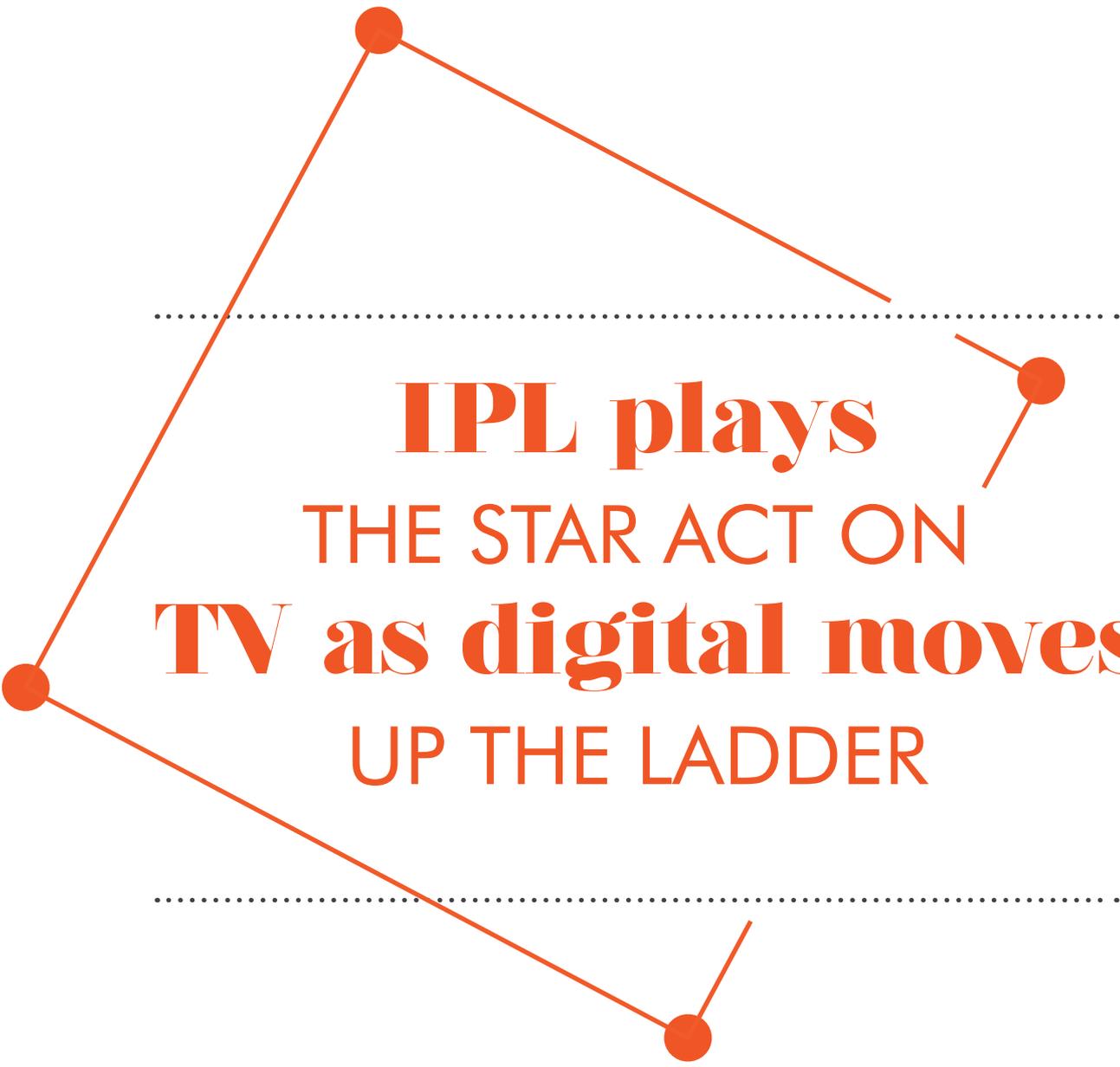
While it's too early to predict its impact, The Pro Volleyball League also made an impressive start in its debut season in terms of viewership. The numbers for the inaugural season of PVL were far better than other sports leagues such as wrestling which proved to be more spectator friendly. It's interesting to note that 35% of the viewership came from Hindi commentary which is a rarity for a sport that's popular in the South. Similar is the case for World Wrestling Entertainment (WWE) event that witnessed a 3X growth in viewership.

In a nutshell, I feel that the digital landscape is reshaping and more importantly retelling India's sports culture. And, we at SonyLIV feel proud to be frontrunners in this development. Breaking the gender bias in sports viewing, ensuring traction from smaller towns and connecting with the audience through second screen initiatives are some of our milestones in this journey. But there's a long way to go and I restate our promise of emerging as the biggest sports destination in India committed to building a new sports environment for one and all.

Cricket may still continue to be a crowd favourite but other sports are also tightening their grip in the ecosystem which is an overwhelming change for a nation of 1.3 billion.







# **IPL plays** **THE STAR ACT ON** **TV as digital moves** **UP THE LADDER**

The winning combination of cricket and TV continues its surge in 2018 on the back of steep media rates at India's big money league. New media consumption trends are emerging as India warms up to the OTT revolution. Print continues to shrink and goes significantly below digital media in terms of ad revenue.

If we thought 2015 was a year we just left behind and that changes from then to now are purely incremental with no significant shifts, then here's a piece of news that might be surprising. Over the three years from 2015 to 2018, advertising spends on TV have more than doubled on sports properties, from INR 1757 Cr (\$270Mn) to INR 3779 Cr (\$556Mn), at a whopping CAGR of 29%. Growing at exactly the same rate over the same time period was digital media that has reached INR 475 Cr (\$70Mn) from a figure of INR 220 Cr (\$34Mn) that it recorded three years back. In the process, digital media overtook print media that declined from INR 840 Cr (\$129Mn) to just INR 178 Cr (\$26Mn). In the previous two editions of the India Sports Sponsorship report we had indicated that digital will surpass print in terms of ad revenue in sports very soon; to just say that this happened in 2018 would be an understatement because not only did digital go past print last year but did so by quite a distance, digital adex for 2018 was in fact more than twice the print tally! This heavy skewing is, of course, triggered by rapid adoption of digital medium by marketers as also by the shift in outlay from print to TV by some big money advertisers.

While the three-year picture has a tale to tell, let us have a look at how the media game was played out last year. 2017 saw Sony Pictures Network ending its 10-year run as the India broadcaster for IPL. In spite of the post-demonetization drag that was felt in the advertising world, they ended the IPL association on a veritable high with increased media rates. With that elevated base already in place, Star India acquired the broadcast rights for the IPL and came up in 2018 with a media rate that was at a steep increase over 2017; leaving brands without enough budgets to spend on other sporting properties after being part of Indian cricket's golden goose. Consequently, on air TV that has been riding a wave in recent times; delivered lower growth in 2018 at 12%. Print advertising, which was a shade higher than digital in 2017, shrunk to half of its own figure in the previous year, as many brands shifted out of it. Digital grew at 44% triggered by Hotstar and SonyLiv as OTT continued to drive adoption and carved a niche for itself.

**85% of all adex in sports happened on TV in 2018. This is indicative of the fact that watching sports on TV the conventional way is by far the most popular way of keeping a close tab on the games you want to see. It wasn't long back when Star India started LIVE streaming of sports and now, with improved Internet connectivity and better smartphone penetration, we are in the middle of a digital revolution.**

Cricket is a national obsession in India and IPL adds that extra verve to it making it a winner all the way. Last year's IPL viewership on TV saw the unique overall reach scaling up to a massive count of 414 Mn. There was 20% increase in Male 15+ SEC AB viewership of IPL whereas in the case of Female 15+ the increment was little lower at 14%. While the marquee event showed unprecedented numbers on TV, the action on the OTT arena wasn't any less exciting either. The homegrown Hotstar that burst on to the scene in the backdrop of ICC World Cup in 2015 dominated India's OTT space. The overall reach for IPL XI on Hotstar was a stunning 202 Mn. In terms of simultaneous online viewership, it set a World Record of 10.3 Mn. The

number of emojis getting shared in a platform is of course a reflection on the level of user engagement and in the case of Hotstar, as many as 2,400 Mn. emojis were shared on the platform in 2018 showing us a glimpse of the potential it holds when it penetrates further. While the IPL spoils went to Hotstar, the other OTT platform which made the most of this emerging trend was SonyLiv. They had the official broadcaster status for the world's most watched sporting spectacle of the year, the FIFA World Cup in 2018. Add to it

the three best overseas tours for the Indian cricket team, to South Africa, England and Australia; and SonyLiv had its own share of viewer acquisition in the OTT space in the year that went by.

With early adopters taking to OTT, it is a question of time before it becomes a mainstream habit and could get enough critical mass to pull in significant amounts of ad revenue on its own. The possibilities in digital media are many and exciting with newer and disruptive technologies emerging. Competition for existing players can come from unexpected quarters too. For instance, La Liga signed a three-year exclusive agreement with Facebook to show all 380 matches to users in India, Afghanistan, Bangladesh, Bhutan, Nepal, the Maldives, Sri Lanka and Pakistan. With huge digital groundswell behind viewership trends, digital media should grow disproportionately in future as wider viewer base will attract more ad revenue.

# Media Spend

Component	2017 (INR Cr)	2017 (USD Mn)	2018 (INR Cr)	2018 (USD Mn)
TV	3379	512	3779	556
Print	356	54	178	26
Digital	330	50	475	70
<b>Total</b>	<b>4065</b>	<b>616</b>	<b>4432</b>	<b>652</b>

Source – **ESP Properties**

2017 Conversion Rate **1\$ = Rs 66**    2018 Conversion Rate **1\$ = Rs 68**

- TV: Spends growth slower as Star managed a steep increase in IPL rates, leaving advertisers with lesser budgets to spends on other sports property
- 50% Decline in Print Spends. Spends shift to digital
- Digital: 44% growth - Thanks to Hotstar & SonyLiv





**EXCITING**  
**action ahead**  
**WITH LOTS OF**  
**scoring**  
**opportunities**

The past decade has been a phase of growth ever since the IPL opened up the commercial potential of sports in India. The annual CAGR over the period has been a solid 14%, which over a ten-year time frame has seen overall sports sponsorship multiply 3.5 times in India. With India's leading sporting league showcasing a new business model, the franchise-based template has been replicated in other cricketing nations, as well as in other forms of sports in India. With the deep-rooted connect cricket enjoys in our mind space, the gentleman's game can still go a lot further in India. At the same time, other sports also have fan following of their own, which is evident from the success enjoyed by certain sporting leagues that took shape in the post-IPL era.

Looking at the history of the World Cup, it is an event in which India pulled off the unbelievable in 1983 by winning against the mighty West Indians in the finals, back in the day when the tournament used to be played only in England, that too in white clothing. That win had provided a lot of impetus for the game in our country and when we won the tournament again in 2011, we felt we truly belonged at the top. Today, the team is a dominant force in the world of cricket and is a strong contender for a third title this year. A tournament win, no doubt will spark off euphoria among fans; some stars will shine brighter and some stars will be created.

The IPL will be starting little earlier this year, so as to get it into the right slot keeping in mind the General Elections in India and also to allow for a reasonable break before the ICC spectacle in England. 2018 saw Star India taking over media rights and riding an advertising wave at cricket's big money league. The IPL central contracts will be going strong this year too as the Dhoni-led CSK look to retain their title and the Virat-led RCB continue their quest for a maiden victory. The franchise fee that stopped coming into play after the first ten years, affected the total sponsorship figures in 2018; that correction is therefore accounted for in the base figure itself and will not be a de-growth factor going forward. So with all the cricketing reasons being in the right place, there are no major non-cricketing reasons that could dampen the economics of the IPL in 2019. All

factors considered, we could expect a lot of runs to be accumulated, as cricket is all set for a solid year to look forward to.

Moving on from cricket, when football went the IPL way in 2014 with the Indian Super League (ISL), we already had a top-tier league in the country. The I-League, in spite of being competitive with lot of local flavour, lacks the commercial eco-system that ISL came with. Since then there has been a state of confused identity between the competing formats. The ISL in the past few years grew strongly as a property with extended seasons and is now accredited by international bodies that govern the game. Attempts to unify the leagues have not been met with much success and the onus is on AIFF to restore the much-needed normalcy. Iconic Kolkata clubs Mohan Bagan and East Bengal have been keen to be part of the ISL and with the entry of Bengaluru FC into the league, some ice seems to have thawed as far as reaching a win-win solution is concerned. Soccer is the most watched game in the world and viewing the Indian sports scenario from the perspective of the game, there is a lot of potential that can be unlocked if structural issues are fixed.

India hosted the Hockey World Cup in 2018 with the Odisha Government giving the game the much-needed fillip. The state hosted the event and while this created lots of buzz and interest, the Hockey India League was conspicuous by its absence last year. Commercial uncertainties led to the event not being held in 2018, which was a big disappointment for lovers of the game. Having said that, things could well turn out to be very different this year for the league. With hockey being a game that is no stranger to changes in rules for years now, the HIL is expected to take things a little further in 2019. The league is expected to be back with a new format that could bring in a fresh wave of excitement. HIL 2019 could see five-a-side hockey with competitions for men and women happening simultaneously. There could also be a combined trophy that will be up for grabs. This could well be the T20-esque route to invigorating a game that Indians had historically connected with, before cricket changed the levels of engagement altogether.

To assimilate what 2019 holds for the sporting nation in the making, we need to take a pause and have a good look at the cricket calendar for the year. We are talking about the most popular sport in our country and our team is among the favorites to win the quadrennial ICC World Cup happening later this year.

India's homegrown sport Kabaddi had a good year in 2018 with the Pro Kabaddi doing well y-o-y. Vivo was the Title Sponsor and with the association being in effect in 2019 also, the contact sport is expected to do well this year. Same is the case with the Premier Badminton League; Backed by a strong system, we can expect more and more talents to mushroom in this racket sport and make most of the opportunity they get to play alongside big international names in the league. Basketball and Volleyball are two sports in which there has been anticipation about league-based competitions for some time now. While the latter joined the party with the Pro Volleyball League in February 2019, there are no strong signals of a franchise-based Basketball League happening immediately in India. Premier Futsal, Super Boxing League, Cue Slam and P1 Power Racing were competitions that could not be held in 2018 and their future remains uncertain.

Unlike 2018, this year doesn't have major sporting events like Asian Games and Commonwealth Games. It is the year before the Summer Olympic Games and hence many events that play the role of Olympic Qualifiers will happen this year. The World Athletic Championships to be held in Qatar later this year is an opportunity for Indian athletes to make a mark on the world stage. The Olympic Games throw up unlikely heroes who catch the imagination of the Indian sports lovers and this year will be crucial for them in the run-up to Tokyo 2020. Of all the sporting events lined up this year, the team for the Cricket World Cup will be carrying maximum weight of public expectations in a nation where the game is a religion. We have a busy sporting calendar in 2019; there will be hits and misses, and highs and lows like in any other season.

2019 is a lovely wicket to bat on, with lots of runs to be scored. It is a year of possibilities for the business of sports, and waiting in anticipation is the sporting nation in the making.



# SUMMARY

Year	2008 in INR Cr	2009 in INR Cr	2010 in INR Cr	2011 in INR Cr	2012 in INR Cr	2013 in INR Cr	2014 in INR Cr	2015 in INR Cr	2016 in INR Cr	2017 in INR Cr	2018 in INR Cr
Overall	2423	2726	4037	5314	4405	4381	4617	5363	6400	7300	7762
% Growth		13%	48%	32%	-17%	-1%	9%	16%	19%	14%	6%
On Ground	426	420	1043	705	712	759	795	1030	1166	1337	1603
% Growth		-2%	150%	-30%	1%	6%	5%	30%	13%	15%	20%
Team	437	445	456	724	669	465	494	558	700	819	892
% Growth		2%	3%	60%	-8%	-30%	6%	13%	25%	17%	9%
Franchise	284	284	284	618	481	527	482	541	548	684	354
% Growth		0%	0%	117%	-22%	10%	-8%	12%	1%	25%	-48%
Athlete	126	127	254	267	293	382	328	416	476	395	482
% Growth		1%	100%	5%	10%	30%	-14%	27%	14%	-17%	22%
Media Spends	1150	1450	2000	3000	2250	2250	2518	2817	3511	4065	4432
% Growth		26%	38%	50%	-25%	0%	12%	12%	25%	16%	9%

Year	2008 in \$ Mil	2009 in \$ Mil	2010 in \$ Mil	2011 in \$ Mil	2012 in \$ Mil	2013 in \$ Mil	2014 in \$ Mil	2015 in \$ Mil	2016 in \$ Mil	2017 in \$ Mil	2018 in \$ Mil
<b>INR - USD Conversion Rate</b>	<b>43</b>	<b>48</b>	<b>46</b>	<b>47</b>	<b>53</b>	<b>59</b>	<b>61</b>	<b>65</b>	<b>68</b>	<b>66</b>	<b>68</b>
Overall	564	568	878	1131	831	743	757	825	941	1106	1141
On Ground	99	88	227	150	134	128	130	159	171	203	236
Team	102	93	99	154	126	79	81	86	103	124	131
Franchise	66	59	62	131	91	89	79	83	81	104	52
Athlete	29	26	55	57	55	65	54	64	70	60	71
Media Spends	267	302	435	638	425	381	413	433	516	616	652

- IPL Franchise Fee ceased to be valid in 2018 rendering a year-on-year comparison irrelevant in that area. Netting off this difference, overall sports sponsorship gave a healthy growth of 12% last year.



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Properties

## About ESP Properties

ESP Properties is a new type of sports and entertainment marketing agency, dedicated to helping rightsholders take advantage of digital and data driven changes in the media landscape. It is part of WPP's GroupM. ESP Properties is dedicated to helping properties better understand their audiences, develop more relevant ways to engage with them, and provide potential brand partners more valuable ways to connect with their communities of fans.

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