SPORTING NATION
IN THE MAKING V

ESP PROPERTIES - SPORTZPOWER
INDIA SPORTS SPONSORSHIP REPORT 2018
This edition examines the happenings in the India Sports Sponsorship market during calendar year 2017, which despite the drag on the larger economy caused by end-2016’s demonetisation and the introduction of General Sales Tax (GST) mid-year, has turned out to be remarkable one in more ways than one.

Let’s start at the top. Cricket and the Indian Premier League (IPL) had its best ever season. Paradoxically, in part due to the disruption caused by demonetisation, which put a big squeeze on consumption that the cricket carnival was able to cash in on. The first big release of all that pent up demand was leveraged by brands during the IPL.

There is also the argument that 2017 was the first TRULY big year for sport beyond cricket. And not surprisingly it has been football and kabaddi, specifically Pro Kabaddi and Indian Super League, that laid down the markers.

Both PKL and ISL added teams and extended their seasons. A 12-team PKL stretched from a four-week event to a 13-week one, while the ten-team ISL with a run time of 18+-weeks compared to ten weeks earlier on, now allows their respective promoters to look to growing the all-important fan loyalty/engagement quotient going forward.

Football had added momentum going for it from the increased attention that came its way as India hosted its first ever FIFA U-17 World Cup that became the most attended in the history of the event.

That movement is reflected on the Ground in the numbers delivered by Football, but with the tenth season of IPL having its best ever season in terms of revenues generated for host broadcaster Sony Pictures Networks and Team India playing twice the number of home internationals than 2016, Cricket’s dominance was only further embossed.

All things considered, it is creditable that not only did the industry survive the bouncers thrown at it by extraneous economic anomalies, but still grew a solid 14.1% to hit INR 7,300 Crore and in the process breach the $1 billion barrier. This report covers the size of sports industry of India in 4 parts — On Ground Sponsorship, Team Sponsorship & Franchise, Athlete Management, and Media Spends. Each chapter also covers key trends on investment in order to provide a perspective. 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) in order to increase its utility to Rights Owners, Advertisers, and Agencies.

This edition of the report goes beyond the numbers, and combines our knowledge and insights to analyze and present the key developments that move the industry so that all stakeholders are aware of ground realities that could affect their business.

We gratefully acknowledge the valuable inputs provided by rights owners, agencies, and industry participants who have provided valuable information and support during the preparation of this report.

We hope that you will find this report useful and informative. Any feedback or suggestions to enhance future editions of this report are most welcome.

FOREWORD

We are glad to bring to you the fifth edition of the SPORTING NATION IN THE MAKING, an industry initiative between ESP Properties (the Entertainment & Sports arm of GroupM) and SportzPower (India’s leading provider of sports business news).

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PLATFORM allows brands to build more personal and meaningful relationships with sports fans. Additionally, WPP owned Kantar World Panel and TGI, Light Speed Research mobile survey data and IMRB’s iProspect data all come together with countless other attributes to help identify fans at an individual level and find other consumers who resemble them. Finally, WPP’s Data Alliance, a WPP company that supports the Group’s data business, works horizontally with these agencies and others like Wunderman and Ogilvy, to provide resources and data partnerships, build use cases and execute audience insights that help drive these types of opportunities.
INDIAN SPORT STEPS UP ITS BIG LEAGUES GAME

Good governance and transparency. The holy grail for sports is still a good distance away in India as a general principal but the needle IS shifting in fits and starts, with and without judicial intervention.

2017 kicked off with the Supreme Court appointing a four-member Committee of Administrators led by the former Comptroller and Auditor General (CAG) Vinod Rai to function as the new interim boss of the Board of Control for Cricket in India (BCCI). The CoA’s mandate - to run the day-to-day administration of the world’s richest and most powerful cricket body.

That the four-member panel had become a two-member one by year-end was not exactly the best advertisement for the manner in which the CoA itself was being run. But that is at par when one talks of matters of governance in India, so suffice to say that net net, there were positive takeaways from the whole exercise by the time 2017 came to a close.

For the purposes of this report, however, what is of most importance is where the various leagues in the country, new and old, well governed or not, stand in the popularity stakes? In that regard there is an argument that 2017 was the first TRULY big year for sport beyond cricket. And not surprisingly it has been football and kabaddi, specifically Pro Kabaddi and Indian Super League, that laid down the markers.

First Pro Kabaddi, which, as per television ratings, is the second-most popular league in India after the Indian Premier League. For the fifth season, the tournament expanded, both in terms of participating teams and duration. The original eight franchises were buttressed by the addition of four new teams - Gujarat Fortunegiants, Tamil Thalaivas, UP Yoddha and Haryana Steelers.

In terms of time span, Pro Kabaddi stretched from a four-week event to a 13-week one. While there have been questions raised on whether the league’s transformation from a compact high-on-action tournament to an expanded proposition has delivered on the intent of creating a product that remains a prime-time broadcast for a longer period of time, the truth is that when viewed from a big picture perspective, it has worked. That is the message that comes through from the franchise owners and sponsors.

As for the ISL, 2017 saw the entry of Jamshedpur FC, owned by Tata Steel, and Bengaluru FC (parent company Jindal South West Holdings Ltd) into the league, making it a ten-team championship. A ten-team championship that with a run time of 18+ weeks compared to ten weeks earlier on, will allow promoters Football Sports Development Ltd to grow the all-important fan loyalty/engagement quotient in the coming seasons.
In the more immediate here and now though, the big upshot for the Beautiful Game was delivered by India hosting its first ever FIFA tournament. The 17th edition of the U-17 World Cup in India became the most attended in the history of the event that has been variously described as a watershed moment, a tipping point for Indian football, a springboard to take the game to new heights in the country. Hyperbole aside, and paraphrasing Star India managing director Sanjay Gupta in an interview he gave to SportzPower, “So one big movement (in the last few years) has been that multi sports, or sports beyond cricket, have got a certain level of recognition from a viewer point of view.”

That movement is reflected on the Ground in the numbers delivered by Football, but with the tenth season of the Indian Premier League having its best ever season in terms of revenues generated for host broadcaster Sony Pictures Networks and Team India playing twice the number of home internationals than 2016, Cricket’s dominance was more pronounced in 2017 than the prior year.

Looked at from a big picture perspective, India’s advertising investment in 2017 stood at INR 61,263 cr ($9282 million), growing by a massive 63.8 per cent, due to in some measure to the drag on the economy caused by demonetisation in November 2016 and the implementation of the Goods and Services Tax (GST) in July 2017.

It was a milestone year on the Sports Sponsorship front, however, as the $1 billion mark was breached for the first time. Overall growth in Sports Sponsorship stood at an impressive 14.1 per cent, touching INR 7,300 cr ($1106 million), a solid step up from the INR 6,400 cr ($941 million) garnered in 2016.

While On Ground Sponsorship grew from INR 1165 cr ($171 million) to INR 1337 cr ($203 million); Team Sponsorship went up from INR 700 cr ($103 million) to INR 819 cr ($124 million); Franchise Fees rose from INR 548 cr ($81 million) to INR 684 cr ($104 million). It was not all positive though, with Endorsements down from INR 476 cr ($70 million) to INR 395 cr ($60 million).

As always, making up the biggest quantum of Sports Sponsorship investments was Media Spends accounting for 55.68 per cent of overall spends. Growing 15.8 per cent, they were up from INR 3511 cr ($516 million) to INR 4065 cr ($616 million).

Looking at the highs of 2017, IPL carried forward the momentum from 2016 and soared even higher, both ratings and revenue-wise. India’s Money League mopped up INR 1200 cr+ ($182 million) NET in ad sales revenues for Sony Pictures Network India, compared to INR 1020 cr ($150 million) net in 2016.

IPL’s 2017 season garnered 411 million viewers, as per data provided by BARC, up from 361 million for IPL 9.

As for India’s second biggest sport by participation and attendance, Football has grown by a massive 63.8 per cent. This was mainly on the back of the ISL becoming a 10-team league with an 18+weeks season which saw Hero MotoCorp renew its Title Sponsorship till 2019 at a 196 per cent incremental value over the previous cycle.

There was also the U-17 World Cup which pulled in over INR 40 cr ($6 million) worth of sponsorships from a clutch of local partners.

Speaking of U-17 World Cup, India’s hosting of the FIFA youth football tournament also meant that questions around the future structure of club football in India got pushed for some resolution into 2018. The temporary solution that FIFA and continental body AFC endorsed was that ISL and the struggling to stay afloat I-League would run simultaneously for the 2017-2018 season.

Staying with Football, what didn’t make money for a second season running was Premier Futsal, a league that looked to channel money into Football’s short–form format and had international star power simply did not have a convincing tale to tell potential partners, it would seem.
And Premier Futsal was not the only franchise-based league that failed to pull in the moolah. Super Boxing League, Super Fight League and Cue Slam, all of which made their debuts in 2017, had negligible sponsor support in their inaugural seasons.

There were also leagues on the plus side of the earnings lane – Hockey India League, Premier Badminton League, Pro Wrestling League, as well as newlybies Ultimate Table Tennis and P1 Powerboat Indian Grand Prix of the Seas all managed to raise sponsor revenues to varying degrees.

As for Kabaddi, the league marginally de-grew by 6.6 per cent. The decision by Star India, Pro Kabaddi League’s principal owner, to have only one extended season and 12 franchises competing in 2017 instead of the two seasons that were seen in 2016, as well as the fact that in 2016 the Kabaddi World Cup was held in Ahmedabad, are the twin reasons why sponsorship support for the sport contracted in absolute terms.

Overall, Kabaddi generated INR 114 cr ($17 million), down from INR 122 cr ($18 million) in 2016. The more pertinent news from India’s home grown contact team sport though, was that Title Sponsorship for Pro Kabaddi was sealed by Chinese smartphone major Vivo for INR 262 cr ($40 million) for 5 years, starting 2017 – at 100 per cent incremental value from rights holder Star Sports’ previous ask. Clearly, 2017 was not without challenges. So all the more reason to believe that the momentum that is/has been building these past few years is an unstoppable force.

In Cricket, the force remained with Virat Kohli, who is setting new benchmarks and breaking records by the day. Indian Cricket is no more a triumvirate of Kohli, MS Dhoni and Sachin Tendulkar. The Indian captain in all formats is today the Big ONE, standing in a league of his own with endorsement deals that tote up to more than twice what the other two endorsement titans of Indian sport pull in. Staying with the money discourse, and accounting for the challenges that 2017 threw up, net, net, the picture certainly looks bright. And while Cricket upped the ante on all fronts, Non Cricket made a BIG statement with the title sponsorship deals that Pro Kabaddi and ISL negotiated in 2017. All of this forms the preamble for the fifth edition of the ESP Properties - SportzPower India Sports Sponsorship Report.

The Report examines advertising investments in Indian Sport in the calendar year 2017 from four angles – On Ground, Team Sponsorship, Athlete Endorsement, and Media – while also noting how franchise revenues impacted the overall sponsorship pie. It bears noting that the Sports Industry Data provided in this report DOES NOT include: Gate Receipts; Players Fee / Salary; Prize Money; Merchandising; Subscription; Sports Goods; Operational Costs. As stated, Sports Sponsorship grew across the board by an impressive 14.1% in 2017, to INR 7,300 cr ($1106 million), a big jump up from the INR 6,400 cr ($941 million) garnered in 2016, and comparing brilliantly well to the sub 10 per cent growth in overall ad spends the Media Sector as a whole registered in the year to stand at INR 61,263 cr ($9282 million).

And while demonetisation and GST has hit overall ad expenditure in 2017, the Sports sector has been able to ride the storm more than well. Summing up, with ad spending in India touching INR 61,263 cr ($9282 million) in 2017, Sports Sponsorship makes up 11.9 per cent of the overall advertising pie, a step up from the 11.5 per cent market share registered in 2016.
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*Source – ESP Properties*

2016 Conversion Rate 1$ = INR 68

2017 Conversion Rate 1$ = INR 66

Sports Sponsorship grew by 14.1%

Sports Sponsorship Size 11.9% of AdEx
DATA MANAGEMENT PLATFORMS & SPORTS MARKETING: A READY OPPORTUNITY FOR THE TAKING

As technological innovation continues to transform the world of sports advertising, Data Management Platforms (DMPs) present a new, revenue yielding, opportunity to create fan-based audience segments.

Imagine connecting a single sports fan to the number of games they have watched, digital content they consume, place where they reside, organization they work with, online and offline transactions, and any other behavior based on browsing habits—such as intent to purchase. The permutations to create consumer segments are endless, and this opportunity currently exists. Combined with the ability to target media via SMS, display, video through their various devices and screens in real time via programmatic platforms, we can come to understand the consumer as a well-rounded individual.

To give some context, statistical data and market research analysis have always been used to study athlete performance and popularity, in order to gain a larger share of wallet from brands with reinforcement in form of supporting facts and figures. While this practice has evolved over a longer period, and is supported by many technological advances, the formulae to calculate monies have not changed much. We have reached an apex, we are plateauing. We must look to other avenues for capitalizing untouched, valuable data sets: fans and partnerships.

When we try to find sports fans, our ability to seek them is generally out of a myopic view. We tend to look for people either on sports publications online, watching TV content, or live in stadia for offline activities. However, an average sports lover in India consumes other digital content and that unearths untapped advertising opportunities. With the help of DMPs, we can find that an average sports lover also spends time on movies, business, and health related activities. Reaching these users during these other moments capitalizes on beneficial purchasing power. With the help of polygon geo fencing around areas of interest, we can then extract AdID and IDFA from mobile devices for an immersive and rich in-app experience. Finally, to come full circle, we use all this information to reach the specific individual while they are consuming unrelated content, at the right moment via an OTA partner—a targeted, personalized approach.

Although there are many Data Management Platforms in market which allow for the enterprise to manage their CRM first party data and create meaningful audience segments from 3rd party data assets available, GroupM’s [m]PLATFORM is the only DMP that goes above and beyond by...
adding ad exposure, transactional activities, media consumption and market research data to the equation. [m]PLATFORM allows brands to build more personal and meaningful relationships with sports fans. Additionally, WPP owned Kantar World Panel and TGI, Light Speed Research mobile survey data and IMRB’s iProspect data all come together with countless other attributes to help identify fans at an individual level and find other consumers who resemble them. Finally, WPP’s Data Alliance, a WPP company that supports the Group’s data business, works horizontally with these agencies and others like Wunderman and Ogilvy, to provide resources and data partnerships, build use cases and execute audience insights that help drive these types of opportunities.

Top digital behaviours of an average sports enthusiast in India:

- **Health & Fitness**: 74%
- **Personal Finance**: 45%
- **Travel**: 59%
- **Movies**: 68%
- **Business**: 52%

These segments open the umbrella of opportunities for targeting and also help us understand the overall persona of a user. In-turn using these insights to improve offline campaigns.
Consider one last example of how sponsorship intelligence was improved in 2016 by taking segment data and matching it to Facebook likes, to plan sponsorships for the Olympics. WPP was tasked with helping the client understand how best to appeal to a key segment, as part of the planning process. Without surprise there was a match of 40K between the client’s Segment Data with Context Data (Facebook Likes). The ‘likes’ were mined by segment to understand affinities by page and category.

Relative Top Music Likes

Music v. Sports/Athletes

"Earlier we only had music genre data, now we can get deeper engagement with specific artists for commercials and promos." – Financial Services Client

From the actionable insights mined, it was learned that Athletes/Sports may not be the right place to focus on for content creation. Instead, the focus should shift to the Top Liked category, Music, which represented 11% of all likes. As a result of this shift, the brand was able to tell their live-events partner the top liked artists per segment to incorporate into promotional planning. In appealing to real tastes, the client was eager to understand the tastes of key segments to help in researching alignment with past Olympics and specific sports & athletes for sponsorships and/or ad campaigns for Rio 2016. Context highlighted that all customer segments over indexed in music vs. Sports/Athletes.

Similarly using a Sport Data Management Platform can substantially unearth previously unknown facts about Sports Audiences and allow for finer attribution and thereby enabling agencies to build better communications, dynamic campaigns catered to specific audience subsets and lead to higher ROI’s.
FOOTBALL STEPS UP A BIG NOTCH; CRICKET HAS 50% OF THE GROUND COVERED

The Big Daddy of Indian Sports had much to crow about in the Chinese Year of the Rooster. Growing at a solid 18.9%, On Ground sponsorship in Cricket crossed the magic $100 million mark for the first time, closing the year more than INR 100 crore to the good over what 2016 delivered.

The short answer to how On Ground sponsorship shot up to INR 669 crore ($101 million) from INR 563 crore ($83 million) in the previous year is - more home game time. Team India faced international teams in 34 games all told in 2017, exactly twice the number of home matches the Boys in Blue played in 2016.

As for India’s Big Money league, there was no change in IPL Central Sponsorship, ergo revenues accrued - at approximately INR 235 crore ($36 million) - remained unchanged.

Among IPL Central Sponsors, there was Vivo (Title), Official Partners Vodafone, Yes Bank, Maruti and Future Group’s value fashion brand fbb and Ceat as Strategic Time-Out Partner.

A point of note is that fbb became an official partner after Snapdeal-owned digital payments platform FreeCharge surrendered the final year of its two-year on-ground IPL sponsorship rights over to the Future Group.

The same was the case as far as ICC Central Sponsorship was concerned. These include Global Sponsors MRF, Nissan and Oppo, along with Event Partner Moneygram, collectively accounting for approximately INR 140-150 crore ($21 - 23 million) that comes directly from the Indian market. It needs noting that Emirates Airlines, which is also an ICC Global Sponsor, is not included in the calculation as the sponsorship is coming from the UAE.

One advantage that 2016 had over 2017 in terms of revenue accruals, however, was that there were two more tournaments in the year - Asia Cup (Bangladesh) and Masters Champions League (UAE). Though neither was held in India, all the sponsor deals of note were from Indian brands.

Cricket also had two state run franchise based leagues that added to the overall sponsorship pie.

The second season of the Tamil Nadu Premier League had India Cements pumping in INR 4 crore ($0.6 million) while remaining the title sponsor, as well as Birla Super White, Equitas Bank, TechPlay, and Tata Gluco Plus on board as associate sponsors generating INR 6.45 crore ($1 million) as central sponsorship revenue for the N Srinivasan-controlled Tamil Nadu Cricket Association.

Not too far behind TNPL was the Karnataka Premier League, where Karbon Mobiles took title rights for INR 3 crore ($0.4 million) while Cycle, Vimal, SBI and Titan pitched in as associate sponsors; pumping in INR 6.3 crore ($1 million) in all as central revenues.
From cricket to the two team games that offer the immediate next lower rung of money league propositions in India - Kabaddi and Football. It was a straight swap in terms of monies mapped up between the country's home grown team contact sport and the world's most popular team game.

It was not just a swap though, but a major shift that took place, with Football surging well ahead of Kabaddi in its On Ground game. While Football has grown by a massive 63.8% in 2017, Kabaddi saw a contraction, down 6.6% over 2016.

A significant contributor to the BIG year that Football was centred of course around India hosting its first FIFA tournament - the Under-17 World Cup - which kicked off on 6 October 2017, running through till the final on 28 October at Kolkata's iconic Salt Lake Stadium.

That the wider public took to the event was more than validated in spectator numbers. Attendance for this World Cup was a record 1,347,333, surpassing China's 1985 edition where it was 1,230,976.

And while fan attendance was a revelation, what also set records was the Mission 11 Million football initiative that the Union government got fully behind, which was aimed towards taking the game to 12,000 schools in 37 cities across the country. The ball was set rolling by then Union Sports Minister Vijay Goel and president of the All India Football Federation (AIFF) Praful Patel at New Delhi’s Nehru Stadium in early February 2017.

The state governments of the six cities chosen as host venues for the U17 World Cup pulled their weight as well, leaving a lasting legacy of world class stadiums in Navi Mumbai, Margao, Kochi, Kolkata, Guwahati and New Delhi.

None more so than Salt Lake though. The West Bengal government spent more than INR 100 crore ($15 million) in its refurbishment before temporarily handing it over to FIFA’s control for 50-odd days till the World Cup was done and dusted. After the final, the state government reclaimed what can now justifiably be called its pride.

For the purposes of this report, however, what is relevant is the On Ground sponsor monies that the tournament managed to pull in. ‘National Supporters’ Hero Moto Corp, Bank of Baroda, Coal India, NTPC, Dalmia Cements and Byjus collectively spent over INR 40 crore ($6 million) on the World Cup.

As the numbers show, it was clearly not the World Cup that moved the needle that resulted in a 63.8% positive swing in On Ground sponsorship for Football.

That honour actually belongs NOT to a football property, but to a brand – Hero MotoCorp. After being associated with the Indian Super League since its inaugural edition as a title sponsor, the world’s largest two-wheeler manufacturer renewed its lead partner positioning with ISL for another three years till 2019 at 196 percent incremental value from the previous cycle. Not just that, Hero is also the title sponsor of the I-league, the Federation Cup and lead sponsor of the Indian national teams to boot.

All told, Hero’s financial commitment to Indian football stands at upwards of INR 48 crore ($7 million) a year.

Having said that, at INR 38 crore ($6 million), it is the ISL that makes up the highest value proposition in Hero’s football sponsorship and is a massive increase from the INR 18 crore ($3 million) the Delhi-based two-wheeler giant was paying in the earlier cycle.

Hero’s increased outlay is of course due to the fact that the ISL is a much bigger proposition now, what with JSW Steel owned Bengaluru FC and TATA Steel owned Jamshedpur FC joining its ranks to make for a ten-team league from the 2017-2018 season on. Even in terms of run time the ISL is now an 18+ week league as compared to ten weeks in the first three seasons.

And what of the I-League? Well, it is clearly living on borrowed time as far as its (at least for now) notional status as the country’s top tier club competition is concerned.

The scheduling change that was made on account of the U-17 World Cup where the ISL and I-League ran concurrently rather than one following the other as was the case earlier, in actual fact set the template on what can be expected going
forward. Which is that, as is the case across the world, the different tiers of India's football leagues will run concurrently. So while much faux hair splitting may continue on what status the I-League has in the current scheme of things, like it or not the objective reality on the ground is that it is the second tier league of Indian club football.

On the subject of second tier, that Kabaddi dropped in 2017 to no. 3 from the second spot it held behind Cricket in 2016 has everything to do with the reasons detailed above. But Kabaddi's drop in absolute terms from INR 122 crore ($18 million) to INR 114 crore ($17 million) came in spite of Pro Kabaddi controlling stakeholder, Star India finally getting a title sponsor on board in vivo for INR 252 crore ($40 million) for 5 years starting 2017.

It bears noting that Star India had gone through four editions of Pro Kabaddi without a title sponsor as it refused to budge on its asking price of INR 25 crore ($4 million). That when it did finally sign on a title partner it was at a 100% incremental value from its previous ask is quite remarkable.

Of course the more than doubling in the value of title sponsor price came on the back of Pro Kabaddi adding four new franchises with big name owners in Iquest Enterprises Private Limited (N Prasad & Sachin Tendulkar), Adani Wilmar Limited (Adani Group), GMR League Games Private Limited (GMR Group) and JSW Sports Private Limited (JSW Group). The bunching up of Pro Kabaddi from an eight-team league to a 12-team one meant PKL 2017 was a 12-week league playing out 138 matches compared to 5 weeks and 60 matches in the earlier seasons.

All of this also meant more monies coming in from associate sponsors TVS Tyres, Bajaj Electricals, Mutual Fund Sahi Hai, Manyavar and Gillette as well as official partners Nissin, Royal Challenge, RR Kabel and Ultradeck, collectively contributing over INR 62 crore ($9 million+).

In terms of sponsorships, therefore, Pro Kabaddi 2017 was clearly up over the two editions that were delivered in 2016.

That it still fell short of the 2016 numbers is because in 2016 there was also the Kabaddi World Cup, which generated approximately INR 20 crore ($3 million) in sponsorship monies from Amazon, Patanjali, Syska, Voltini as associate sponsors, and Thumbs Up, Skill India and Nissin as official partners.

Moving on from the Top 3 in the On Ground game to the "best of the rest", the Distance Running ecosystem continues its upward trajectory, growing 22% to INR 99 crore ($15 million), up from INR 75 crore ($11 million) in the year prior.

The numbers tell their own tale, as Anil Singh, managing director of Procam International (one half of the brother duo that pioneered distance running in India) informed SportzPower in a recent interaction, “Now there are over 800 of them (timed running events held in India annually), which means on an average there are more than two taking place each day.” Singh noted.

As for the Other Sports, it grappled with negative growth in 2017, dropping from INR 296 crore ($44 million) to INR 275 crore ($42 million).

As was the case in 2016, the main contributor remained the Hockey India League, which had Coal India (Title), Airtel, Hero MotoCorp and Lava mobiles as associate sponsors and Indian Oil and ONGC as official partners, collectively pulling in INR 10-11 crore ($1.5-1.7 million). There was also the Odisha Men's Hockey World League Final Bhubaneswar 2017, which had only Hero MotoCorp as leadership partner.

Coming in behind HIL was the third edition of Premier Badminton League. Vodafone commenced its association as title sponsor, Maruti Suzuki was the “powered by” partner, Amazon & Bajaj Electricals associate and Bisleri partner, all of which accounted for INR 8.5-9 crore ($1.3 - 1.4 million) going behind PBL.

Interestingly, next in line on the On Ground revenues front was NOT the Pro Wrestling League, into its second season, but a powerboat series launched by marathon specialists Procam International The P1 Powerboat, Indian Grand Prix of the Seas, boasting Nexa as title sponsor and Nautica as official partner raked in INR 6.5 crore ($1 million).

As for PWL, even as governance issues continue to dog the event, the mass support the sport enjoys in North India in particular ensured organizers Pro Sportify were able to secure sponsor buy ins from Patanjali (title), Amul (co-sponsor), Essco Bathware, Sunflame, Piccadilly and Bisleri (associate sponsors) to the tune of INR 6 crore ($1 million).

P1 Powerboat, was not the only franchise based league to test Indian waters in 2017. Leagues around Table Tennis, Boxing , MMA and Cue Sports all made their respective debuts. Among the four newbies, it was only Ultimate Table Tennis (promoted by Vita Dani’s 11Even Sports Pvt. Ltd) that could manage a title sponsor in CEAT.

Neither Super Boxing League, nor MMA promotion Super Fight League, fronted by British businessman and sports enthusiast Bill Dosenjha and two-time world champion boxer Amir
There was some good news for Tennis fans though. India’s only ATP 250 tournament was assured of staying in the country after Maharashtra government stepped in following the demise of Tamil Nadu state chief minister J Jayalalithaa. Owned by IMG and organized by IMG Reliance, the annual tournament known till 2017 as the Chennai Open, had been played in the Tamil Nadu capital since 1996. But it was no secret that the renewal in 2016 of the Chennai Open contract for a further three years, though signed between IMG, IMG-Reliance and the Tamil Nadu Tennis Association, was in operation essentially because Jayalalithaa stood guarantee.

Jayalalithaa’s passing meant that the tournament had to find another patron or would move out of India, and fortunately Maharashtra government agreed to perform the role of white knight.

In summation, the On Ground sponsorship pie, at INR 1,337 crore ($203 million) grew by a healthy 14.7% in 2017, up from INR 1,165 crore ($171 million) the previous year.

Expect 2018 to only get bigger, not just on the back of growth from the leagues that are now up and running, but also from new kids on the block that are debuting in the year – Volleyball being a notable one.
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<tr>
<td>Marathon</td>
<td>75</td>
<td>11</td>
<td>99</td>
<td>15</td>
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<tr>
<td>Other Sports</td>
<td>296</td>
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</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>1337</td>
<td>1165</td>
</tr>
</tbody>
</table>

Source – ESP Properties
2016 Conversion Rate 1$ = INR 68
2017 Conversion Rate 1$ = INR 66

- On ground sponsorship has grown by 14.7%
- India Cricket has grown by 18.9% as India played more matches in 2017
- Football has grown by 63.8%.
  - FIFA Under 17 World Cup was successfully held with 6 Indian Sponsors
  - Hero MotoCorp renewed ISL Title Sponsorship at 196% incremental value from previous year
- While the other sports saw a decline due to No Olympics and IPTL in 2017; new leagues like the UTT, SBL, SFL, Cue Slam, Power Boating contributed to overall growth
<table>
<thead>
<tr>
<th>Leagues</th>
<th>Indian Premier League</th>
<th>Pro Kabbadi</th>
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<tbody>
<tr>
<td>Social Conversation</td>
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<td>316,198</td>
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<td>Twitter</td>
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</tr>
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<td>Reach</td>
<td>411,083,000</td>
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<table>
<thead>
<tr>
<th>Leagues</th>
<th>Indian Super League</th>
<th>Premier Badminton League</th>
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<tr>
<td>Reach</td>
<td>158,866,000</td>
<td>35,027,000</td>
</tr>
</tbody>
</table>

Source – GroupM
ISL data is till 31st Jan 2018
Source for TVR and Reach - BARC
TG: 2+, All NCCS, All India

- 12x jump seen in monthly social conversations volumes for Top 4 Sports Leagues during season; PBL being the highest at 18x and ISL related social conversations are the lowest gainers at 4x
- While IPL & PBL search volumes peak in the start months of the league, PKL & ISL peaks around the middle in terms of search volumes
- 22x jump seen in monthly search volumes for Top 4 Sports Leagues during season; IPL being the highest at 33x and PKL is at the lower rung in during season search volume gains at 17x
ANALYTICS TAKES MIDFIELD IN SPORTS

The past decade in sports has witnessed an evolutionary shift towards leveraging analytics to deliver excellence in performance in almost all games and fitness activities. Power and fitness have been the core drivers of this change. Technology, sophisticated data analytics and machine learning algorithms have accelerated this trend at an exponential pace.

You name a sport and we see cutting-edge analytics deployed at its best:

**Cricket:**
Average high scores are increasing every season – it’s all analytics, whether getting the right customized gear to help the impaired cricket legends to play and yet break their existing records again. Or analyze the bowler’s hand movement and simulate the action to practice for better performance.

**NFL/NBA:**
Player selection, on-ground team dynamics to improve individual player performance and overall team scores by addressing their weakness. Should you improve your jump shot or not – such scenarios are now simulated with opponent team player dynamics (in/out member kinematics) to help the players practice with real time challenges.

**Tennis:**
The most significant innovations in the design of racquets with the shift from wooden to graphite and composite material have seen the drift in game strategy from the days of Ashe to the era of Roger Federer and Serena Williams. Did it ever occur to you that the fashion/aesthetics shift in attire from tight shorts to long baggy shorts was proven mathematically to drive controlled movement assisted by loose fitting kit? Interesting!

**Formula One:**
Analyzing petabytes of data produced in a single Formula One championship weekend is one of the major investments for the research teams to better their machine efficiency and performance, which helps them win by nanoseconds every season.

**Olympics:**
Michael Phelps, the most decorated Olympian of all times (28 medals), how does he do it every time and yet again after every 4 years? He is one of the top athletes of the world, who has reached the elite level where every movement of his is measured and analyzed by performance trainers. A dedicated analytics team deploy video analytics and simulat possibilities to perfect his streamline posture using body ratio (legs compared to torso size), kick angle, etc. – these tools generate 100s MB of physiological data everyday tracking heart rate, heart rate variability, skin conductivity, ambient temperature, accelerometry, etc. to design training and recovery sessions.
The amount of dedication, time, investment and reward associated with sports today is immense. Whether it’s the players, coaches, managers, team owners, all have realized the importance of hawk-eyed observation, analysis and evaluating individual player sport skills to improve their edge on the game. Data is fascinating, its impressive the amount of information they have access to, through wearable devices, drone cameras, IoTs- tracking every on-field movement, hand/wrist/leg movement, etc.

Sports analytics excites its audience and users in whichever form used or deployed. From the basic presentation skills resulting in new interesting metric designed by the broadcasters, to engage and excite the audience for the upcoming match teams e.g. the heatometer by Star Sports channel to define the match excitement index for the teams playing is innovative.

The amount of money involved in today’s sporting activities from marketers to betting (legal/illegal) has raised the demand for forecasters more than ever. It’s the precision of their forecast of how the IPL team will perform on a Sunday night match in humid summer evening in the city of Mumbai that makes them “Wanted”.

It all starts from the beginning of the season, team selection – do I have the right mix? Oops! this was my star performer last season picked up by KKR this year, who should I replace this loss with? Are we spending the right amount for this spinner? And yes, analytics helps you make this decision, a much “informed one”. Moneyball was all about this, and decision makers are making use of the most sophisticated algorithms to analyze the player’s past performance before getting them on board.

What are the odds? We played as a team until the last season, we are playing against them this season. What should be my strategy? What should be my playing order? How do I improve my team performance to turn the game to my favor?

And the worst nightmare of the marketers, which team to sponsor? Which match to be on? We at WaveMaker took a stab at making it easy for their clients. Let’s leash the data and see what the new team composition entails. Analyze historical player performance (past 10 IPL season data), inherent fan following, and live game dynamics is an attempt to get as much accurate reach as possible scientifically/statistically.

We have built models that tested it for the last five seasons, from previous to the next and we could predict the reach for 25% of the IPL matches at 95% accuracy, and 90% of the matches in more than 80% accuracy. We built multilevel ensemble models to predict the static fan following for each of the 8 teams individually and the dynamic factor for each of the two teams playing – 56 matches (including player performance, bowler impact, field/pitch – home away stadium, pitch type, weather effect, reach by day and night time) to get it right to the second decimal point.

A highly competitive sports arena has made it a necessity to use the most advanced analytical techniques for deeper insights to perfect that one shot/stroke/hand movement of the players to have the highest level of control on every move the athlete makes. Those who bring it to use are the ones who prove it again and make the new records. Match outcome is not easy to predict, since there are so many moving variables in any live sport. We deploy highly advanced machine learning algorithms to minimize the error at each level to get it close.

Leverage sports analytics, make it a reality. Convert your weakness to strength, every notch you improve takes you closer to success. It is not by chance but you master it, to do it every time henceforth.
NEW FRANCHISES, LEAGUES MAKE FOR A HEALTHY BREW

In a year where the aftershocks of demonetisation were still being felt, and the rollout of GST was a drag on the overall economy, came five new franchise based leagues. It was also a year when two established leagues added new teams to their respective rosters. And one that saw the unfortunate but much-expected demise of an existing league.

This, however, was not the “You must be kidding me” moment of 2017. That moment was provided by Oppo Mobiles, when the Board of Control for Cricket in India (BCCI) announced that the Chinese smartphone firm had made the highest bid ever for Team India sponsorship. Oppo’s winning bid worked out to INR 1,079 crore ($163.48 million) over five years or INR 4.61 crore ($0.70 million) per bilateral match and INR 1.56 crore ($0.24 million) for an ICC tournament match that Team India plays between April 1 2017 and March 31 2022. Incidentally, BCCI’s reserve price was INR 538 crore ($81.52 million).

For some context, Oppo’s bid was 2.4 times what previous sponsor Star India had paid (INR 203 crore, $30.76 million) over the three years it held the rights (at INR 1.92 crore ($0.29 million) per bilateral match / INR 0.61 crore ($0.09 million) per ICC match).

That the only other player in the race was sister smartphone brand Vivo (both are subsidiaries of BBK Electronics Corp), with a INR 768 crore ($116.36 million) offer, would certainly have been a pain point for the Oppo strategy team.

Not so for BCCI chief executive Rahul Johri, who saw the high bids as proof of the “strength of Indian cricket and the opportunity that BCCI provides to companies”.

While on the topic of strength, in significant part due to the Oppo deal, as too the fact that India played more international home fixtures (34), Cricket Team Sponsorship was up by 20.6% in 2017 - from INR 429 crore ($63 million) to INR 518 crore ($78 million).

The story was even brighter for the country’s second biggest game by participation. Football saw a massive expansion in Team Sponsorship numbers to the tune of 41.84%. The uptake, from INR 98 crore ($14 million) in 2016 to INR 139 crore ($21 million), came on the back of the Indian Super League adding two more franchises to become a ten-team league. The other key factor in the upswing was the raft of international deals that a number of Indian brands entered into with Premier League clubs.

Looking at just the ISL, Team Sponsorship has gone up by 22% due to two additional teams and more games (total 95).
The international deals that Indian brands struck with English clubs tote up to INR 75-80 crore ($11.36 - 12.12 million) all told, the notable ones being:

- HCL continued its association with Manchester United
- Wipro continued its association with Chelsea
- Apollo continued its association with Manchester United and signed with Crystal Palace also
- MRF signed up with West Bromwich Albion, Newcastle United, and West Ham United
- Gulf Oil signed with Manchester United

Coming to Other Sports, despite the addition of five new leagues and the expansion of ProKabaddi from an eight-franchise proposition to a 12-team entity, it still witnessed a contraction from INR 172 crore ($26.37 million) in 2016 to INR 163 crore ($25 million). The two reasons being the return of PKL from a two-season experiment back to a traditional one season property and the exit of Mahesh Bhupathi’s International Premier Tennis League from the scene.

Comparing the Team Sponsorship revenues generated from two seasons by an eight-team PKL versus earnings by a 12-team league in one season, it is INR 60-65 crore ($9.09-9.85 million) as against INR 40-42 crore ($6.06-6.36 million).

All taken together therefore, Team Sponsorship registered a healthy 17% growth, from INR 700 crore ($103 million) to INR 819 crore ($124 million).

The news was even more heartening on the Franchise Fees front, growing at 24.8% from INR 548 crore ($81 million) to INR 684 crore ($104 million).

And here, all the upside came from developments on the Other Sports arena, as Cricket remained unchanged at INR 337 crore ($51.66 million).

And what an upside! Growth in Franchise Fees was at a massive 64.45%; from INR 211 crore ($31 million) to INR 347 crore ($53 million). The largest chunk of course came from the addition of two new franchisees to the ISL, each bringing in INR 15 crore ($2.3 million).

As for the four new teams added in PKL, each brought in approximately INR 6-8 crore ($0.91-1.21 million).

Of the five new leagues on the block, P1 Powerboat Indian Grand Prix of the Seas had the highest franchise fees at INR 3-3.5 crore ($0.45 - 0.53 million) per team; then was Ultimate Table Tennis at INR 2.5-3 crore ($0.38-0.46 million) per franchise; followed by Super Boxing League and Super Fight League (INR 2 crore, $0.31 million); with Cue Slam bringing up the rear at INR 1-1.5 crore ($0.15-0.23 million) per team.

In the year, what is again noteworthy is that the BCCI waived off the franchise fee commitments of the suspended Chennai Super Kings and Rajasthan Royals till their return to the IPL in 2018.

CSK and RR’s “temporary” replacements Rising Pune Supergiant and Gujarat Lions paid INR 16 crore ($2.42 million) and INR 10 crore ($1.51 million) respectively to the BCCI. But they also forfeited INR 40 crore each from the central pool payable to franchises. These amounts have been accounted for in ground sponsorships.

As for the Tamil Nadu Premier League, its eight franchises collectively paid the N Srinivasan controlled Tamil Nadu Cricket Association around INR 33 crore ($5 million).

All told a positive year on the Team Sponsorship and Franchise Fees front. And with a new volleyball league expected to launch mid-year, it will hopefully cover for the exit of P1 Powerboat, which will not be making a return after its inaugural season.
Team Sponsorship & Franchise Fee

Team Sponsorship

- Cricket: 429 (2016), 63 (2017)

Franchise Fee


Source – ESP Properties
2016 Conversion Rate 1$ = INR 68
2017 Conversion Rate 1$ = INR 66

- Oppo secured Team India Sponsorship at INR 1079 Cr (April 2017 to March 2022), 117% incremental value from previous deal resulting in 20.6% growth in Cricket Team Sponsorship
- Football Team Sponsorship has grown by 41.4%.
- ISL Team Sponsorship grew by 22% as the number of matches has gone up
- International Football Club Sponsorship is growing rapidly
- Franchise Fee has grown by 24.8%
- 4 New Teams added in PKL and 2 New Teams added in ISL
- Emergence of UTT, SBL, SFL, Cue Slam, P1 added to the overall Franchise Fee Pie
### IPL Franchise

<table>
<thead>
<tr>
<th>Team</th>
<th>Social Conversation</th>
<th>Search</th>
<th>Facebook</th>
<th>Twitter</th>
<th>Instagram</th>
<th>TVR</th>
<th>Reach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mumbai Indians</td>
<td>651,182</td>
<td>19,446,950</td>
<td>12,000,000</td>
<td>4,300,000</td>
<td>1,500,000</td>
<td>3.2</td>
<td>270,000,000</td>
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<td>Kolkata Knight Riders</td>
<td>448,201</td>
<td>8,856,900</td>
<td>15,000,000</td>
<td>3,690,000</td>
<td>469,000</td>
<td>2.8</td>
<td>256,000,000</td>
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<tr>
<td>Royal Challengers Bangalore</td>
<td>326,000</td>
<td>15,748,125</td>
<td>9,000,000</td>
<td>2,750,000</td>
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<td>2.8</td>
<td>249,000,000</td>
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<tr>
<td>Sunrisers Hyderabad</td>
<td>196,629</td>
<td>7,048,900</td>
<td>5,700,000</td>
<td>1,690,000</td>
<td>382,400</td>
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<td>246,000,000</td>
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<tr>
<td>Kings XI Punjab</td>
<td>122,636</td>
<td>3,464,925</td>
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<td>1,640,000</td>
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<td>4,314,225</td>
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<td>307,100</td>
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<td>Rising Pune Supergiant</td>
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<td>2,98,000</td>
<td>2,81,000</td>
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<tr>
<td>Gujarat Lions</td>
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<td>6,573,175</td>
<td>11,20,690</td>
<td>2,66,000</td>
<td>2,69,000</td>
<td>2.5</td>
<td>249,000,000</td>
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</tbody>
</table>

Source – GroupM

Source for TVR and Reach - BARC

TG: 2+, All NCCS, All India

- In terms of average monthly social conversations, Mumbai Indians, Kolkata Knight Riders and Royal Challengers Bangalore are several notches above the rest of the IPL franchises. Delhi Daredevils’ average monthly social conversations, is 1/18th of that of Mumbai Indians
- Monthly social conversations for IPL teams starts picking up from February, peaks in April and wanes out by July
- In terms of average monthly search volumes, Mumbai Indians and Royal Challengers Bangalore are head and shoulders above the rest of the IPL franchises. KXIP’s average monthly search volumes, lowest of the lot, is 1/6th of that of Mumbai Indians
- Monthly search volumes for IPL teams starts picking up from February, peaks in April and wanes out by June
## ISL Franchise

<table>
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<tr>
<th>Social Conversation</th>
<th>Search</th>
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<th>TVR</th>
<th>Reach</th>
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<td><strong>Bengaluru FC</strong></td>
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<td>959,925</td>
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<td><strong>Kerala Blasters</strong></td>
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<td>1,790,000</td>
<td>412,000</td>
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<td><strong>Chennaiyin FC</strong></td>
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<td><strong>ATK</strong></td>
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<td>1,161,600</td>
<td>496,000</td>
<td>115,000</td>
<td>622,000</td>
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</table>

<table>
<thead>
<tr>
<th>Social Conversation</th>
<th>Search</th>
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<th>Twitter</th>
<th>Instagram</th>
<th>TVR</th>
<th>Reach</th>
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<td><strong>FC Goa</strong></td>
<td>31,678</td>
<td>779,050</td>
<td>457,000</td>
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<td><strong>Pune City</strong></td>
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<tr>
<td><strong>Mumbai City</strong></td>
<td>26,336</td>
<td>415,275</td>
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<tr>
<td><strong>Delhi Dynamos</strong></td>
<td>19,275</td>
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<td>113,000</td>
<td>47,500</td>
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<table>
<thead>
<tr>
<th>Social Conversation</th>
<th>Search</th>
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<th>Twitter</th>
<th>Instagram</th>
<th>TVR</th>
<th>Reach</th>
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<td><strong>Jamshepur FC</strong></td>
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<td>65,207</td>
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<td><strong>NorthEast United FC</strong></td>
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<td>321,675</td>
<td>319,000</td>
<td>418,000</td>
<td>73,900</td>
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</tr>
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</table>

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

- Monthly social conversations for ISL teams is at the lowest only in February and March 2017. Monthly social conversations for ISL franchises picked up in July and grew exponentially in November and December.
- Leaving the youngest team – Jamshepur FC out, Atletico de Kolkata, Chennaiyin FC, Bengaluru FC and FC Goa are the most searched ISL franchises as per average monthly volumes. Delhi Dynamos FC’s average monthly search volumes, lowest of the lot, it is 1/19th of that of Atletico de Kolkata.
- Except for April’17 which was an anomaly, monthly average search volumes for ISL franchises picked up in July, grew exponentially in November and peaked in December.
### PKL Franchise

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<th>Instagram</th>
<th>TVR</th>
<th>Reach</th>
<th>Source – GroupM</th>
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</thead>
<tbody>
<tr>
<td>Patna Pirates</td>
<td>50,992</td>
<td>1,193,725</td>
<td>692,000</td>
<td>452,000</td>
<td>62,400</td>
<td>1.6</td>
<td>186,000,000</td>
<td>159,000,000</td>
<td>67,300,000</td>
<td>42,600</td>
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<td>184,000,000</td>
<td>168,000,000</td>
<td></td>
</tr>
<tr>
<td>Tamil Thalaivas</td>
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<td>372,750</td>
<td>272,000</td>
<td>24,700</td>
<td>25,600</td>
<td>1.4</td>
<td></td>
<td>1.4</td>
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<td>1.4</td>
<td></td>
<td>1.4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gujarat Fortunegiants</td>
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<td>27,700</td>
<td>273,000</td>
<td>10,900</td>
<td>20,500</td>
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<td>1.4</td>
<td>62,400</td>
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<td>Bengal Warriors</td>
<td>27,990</td>
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<td>60,800</td>
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<tr>
<td>Ahmedabad Bulls</td>
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- While monthly search volumes for PKL franchises saw a 4x jump during season compared to off-season, the conversations jumped a whopping 22x during season over the rest of the year.
- Gujarat Fortunegiants had polarity of sorts. While their average monthly search volumes were the lowest owing to being one of the youngest team in PKL 2017, their average monthly social conversations was the highest courtesy their on-field performance.
- On social media conversations, 2015 season champion U Mumba couldn’t generate enough chatter on social media.

Source for TVR and Reach - BARC
TG: 2+, All NCCS, All India
## PBL Franchise

<table>
<thead>
<tr>
<th>Franchise</th>
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<th>Search</th>
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<th>Twitter</th>
<th>Instagram</th>
<th>TVR</th>
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<td>0</td>
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</tr>
</tbody>
</table>

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

- Average monthly social conversations jump exponential 48x during season as compared to rest of the year.
- In terms of average monthly search volumes, while it’s obvious that there’s a significant jump during season in search volumes, teams like Hyderabad Hunters saw a fair gain in their search numbers in April / May owing to success of B Sai Praneeth and Tai Tzu-ying in BWF events.
AN ODE TO A DECADE OF “MANORANJAN KA BAAP”

Turning the Gentleman’s game into a fast paced sportainment league and keeping audiences glued over the last 10 years is no small feat! And the Indian Premier League (IPL) has managed to do just that and more… IPL - a heady concoction of glamour, sport, controversies, financial muscle, and a platform for talent has witnessed and inspired the birth of many leagues in Kabaddi, Football, Badminton, Field Hockey amongst others. IPL has truly been ‘Manoranjan’ and ‘Business of Sports’ ka BAAP in the sub-continent!

The multi-million-dollar annual extravaganza that IPL is, has defined the sporting business landscape in India, and in doing so, IPL has managed to rewrite history in ways more than one. From an advertiser’s perspective, IPL could arguably be the only annual event which in 2017 reached 57% of the TV viewing audiences during the months of April-May.

And this, has been demonstrated by the advertiser community’s relentless belief with full gusto. The graph above shows a steady growth of 9.2% CAGR in IPL reach from 2008-15 (TAM years) coupled with 20.3% CAGR growth in IPL AdEx over the decade. Detractors might pin-point a sluggish period between 2011 to 2016 with 3.4% growth in AdEx during this period, however the property has managed to shut them up with a promising 2017 season and subsequently with renewal numbers of Rs 16,347.5 crore for media rights, catapulting IPL in a league of its own. This keeping in mind that down South,
the league has performed under par accounting for 26% of the reach across years. With the new broadcasters bringing in dedicated regional language feed in South, these numbers are only bound to strengthen going forward.

Moving onto the on-ground sponsorship piece. IPL has been a torchbearer, of sorts, in this space too leading the way to set sponsorship guidelines and benchmarks for not only Cricket but also other sports and subsequent leagues. IPL, over the last decade, has managed to pool in INR 4,014 crore across Central and Team Apparel Sponsorships. This amounts to approx. ½ of the IPL AdEx during the same period.

IPL on-ground sponsorship pie has seen a feisty growth at 8.4% CAGR. With the Central Sponsor deals being multi-year commitments, the incremental growth has been driven by on-ground team apparel sponsorship which has grown at a hearty 11.8% CAGR over the last decade. Again pessimists might argue that starting 2011, IPL sponsorship pie has grown at a modest 1.46% CAGR as shown in the graph above. However, advertiser’s interest in the property gets exemplified when you realize that the title sponsorship of IPL for the next five years has been closed at 91% of the total 2017 on-ground sponsorship number. Now that’s what you call GROWTH!

Over the last decade, at a team apparel sponsorship level, we’ve seen a whopping 237 brands doing 741 team apparel sponsorship deals, of which 124 brands have done team apparel sponsorship more than once during 2008-17. One might feel that during the last 5 years, with advent of other sporting leagues in the country, these advertisers are spoilt for choices and the spill over to other leagues must be a significantly large number. But to our surprise, only 38 of them (16%) have tried their hand at leagues other than IPL which shows the success rate and confidence sponsors have in this marquee property.

<table>
<thead>
<tr>
<th>Sector</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Tyres</td>
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<tr>
<td>Conglomerate</td>
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<tr>
<td>Contraceptives</td>
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<tr>
<td>eCommerce</td>
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<tr>
<td>Media</td>
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<tr>
<td>IT Services</td>
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<tr>
<td>Misc.</td>
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<tr>
<td>Cycles</td>
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<tr>
<td>Retail</td>
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<tr>
<td>Travel &amp; Tourism</td>
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<tr>
<td>Food Products</td>
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<tr>
<td>Innenwear</td>
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<tr>
<td>Non Alcoholic Beverages</td>
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<tr>
<td>FMCG</td>
<td>2%</td>
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<tr>
<td>Four Wheelers</td>
<td>2%</td>
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<tr>
<td>Sports Accessories</td>
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<tr>
<td>Airlines</td>
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<tr>
<td>DTH</td>
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<tr>
<td>Apparel</td>
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<tr>
<td>Auto Lubricant</td>
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<tr>
<td>Two Wheelers</td>
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<tr>
<td>Cements</td>
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<tr>
<td>Others</td>
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<tr>
<td>Alcoholic Beverages</td>
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<td>BFSI</td>
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<td>Consumer Durables</td>
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<tr>
<td>Mobile Handset</td>
<td>10%</td>
</tr>
<tr>
<td>Telecom</td>
<td>14%</td>
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</table>
A little deep dive in the brand categories who have seen promise in IPL teams in the last decade, shows Telecom, Mobile Handsets, Consumer Durables, BFSI, Real Estate, Alcoholic Beverages, Cements, Two-Wheelers, Airlines, and Lubricants to be the biggest investors in Team Apparel Sponsorship. To put things in perspective, the aforementioned 10 brand categories have invested 67.4% of the total monies put behind IPL team apparel sponsorship from 2008-17. While this is historic data, what is interesting to know is how category investments have moved over the decade and where do we see big monies coming in from soon.

In the figure above, we see that over the decade investments from Two Wheelers, BFSI, Alcoholic Beverages and Airlines towards team apparel sponsorship has been drying up and other categories like Consumer Durables, Telecom, Mobile Handset, Cements, Real Estate, and Auto Lubricants have grown at an average CAGR of 11.96%. Does that mean, IPL 2018 onwards we’ll see big monies coming in towards IPL team apparel sponsorship from categories mentioned? This, only time will tell...

While going into print, IPL 2018 season is less than 2 weeks away from commencement and with new partners and sponsors on-board, Indian Premier League is all set to take the Indian Sports Industry to astronomical heights in terms of monies invested, audience reached, content created and so on... And we as a cog in the wheel of the sporting fraternity would only hope that the rest of the ecosystem rises to the occasion that is ‘India ka tyohar’...
VIRAT PADS UP BLUE SKY BETWEEN HIM AND THE REST; AS DOES SINDHU AMONG WOMEN

The difference a year makes. More so when the year - 2016 - was an Olympic one (it was the year of the Rio Games).

No surprises therefore that endorsement revenues from Other Sports were down big time in 2017. But that alone does not explain the massive 62.9% contraction that Other Sports witnessed, from INR 197 crore ($29 million) to INR 73 crore ($11 million). More on that later.

Why? Because the main act was all about Cricket. Or more to the point, one man in Cricket - Virat Kohli. If the Cricket Endorsements tally grew by a more than healthy 15.77%, it was nearly all on the shoulders of the Team India captain in all formats of the game - whose legend grows and grows.

If Virat ended 2016 with 20 brands under his belt with a collective endorsement value of INR 120 crore ($18.18 million), in 2017 the brand count was down a notch to 19, but worth INR 150 crore+ ($22.72 million+).

Left way behind in the wake of the Kohli gravy train were the two other long standing endorsement titans of Indian sport - MS Dhoni and Sachin Tendulkar.

While Dhoni is today the face of 13 brands worth around INR 55-60 crore ($8.33 - 9.09 million), Sachin has nine brands under his belt, with an endorsement value totaling INR 25-30 crore ($3.79 - 4.55 million).

As for the current lot of cricketers, if in 2016 the talk was around India’s then bowling spearhead Ravichandran Ashwin making the step up during the course of 2017, it ended with the off spinner no longer in the reckoning even for a team place in Kohli’s scheme of things.

Instead, the man making the headlines has been ‘all-rounder’ Hardik Pandya. Team India’s ‘Mr Bling’ has seven brands in his kitty worth INR 3.5-4 crore ($0.53 - 0.60 million) all told. Two new kids on the block also drawing attention are Prithvi Shaw and Ishan Kishan, both of whom made their debuts in the brand endorsement arena.

Action on the international field, however, has dropped
Returning to the activity on the Other Sports front, taking international deals out of the equation, non-cricket endorsement contracted by 21%. And it was for reasons already touched upon. Bucking the downswing beat big time, however, was PV Sindhu, who followed up on her Rio Silver medal exploits, riding to greater heights in 2017. The Pullela Gopichand protégé (as is almost all of India’s top badminton talent today) currently stands head and shoulders above the rest of the Non-Cricket crowd. The Hyderabad native has INR 30 crore+ ($4.55 million+) worth of endorsements under her belt, drawn from deals with 11 brands, well up from the INR 12 crore ($1.82 million) she pulled in 2016.

Not so the case of Sindhu’s rival Saina Nehwal (2016’s top endorser), tennis player Sania Mirza and boxer Mary Kom (third and fourth respectively in 2016), all of whom have seen significant downturns in brand interest.

Saina lost five brands in 2017, down from the 11 she fronted the year before, while Mary Kom currently endorses three brands, as against 13 in 2016. That was on the distaff side. The big mover among men was India’s highest ranked shutter Kidambi Srikanth, who signed his first endorsement deal with Bank of Baroda, worth INR 1.5 crore ($0.23 million) a year.

Summing up, while Virat and Sindhu soared, the exit of Messi and Tiger from the scene, added to the steady erosion in brand value of Big Guns Sachin and Dhoni, were the prime factors behind Endorsement value dropping 16.8% in 2017; to INR 395 crore ($60 million), from INR 476 crore ($73 million) the previous year.

All told therefore, Cricketers were associated with a total of 90 brands whereas non-cricket athletes got 78 brand endorsements.

massively. And not surprisingly either, considering that monster endorsement deals signed by two international icons ended their respective two-year runs. A INR 60 crore ($9.09 million) a year deal that the world’s best footballer Lionel Messi had going with Tata Motors came to an end after 2016, as too did the one Hero MotoCorp had with Tiger Woods – worth INR 50 crore ($7.58 million) a year.

There is still some ‘minor league’ international play provided by French Footballing great Zinedine Zidane’s ongoing endorsement deal with Kanakia Spaces for its Kanakia Paris project in Mumbai’s Bandra-Kurla Complex worth INR 10 crore ($1.52 million) per year.

A mention needs to be made also of the ones South African cricketer AB De Villiers has signed with MRF, Mont Blanc and Maruti, together worth INR 2-2.5 crore ($0.30-0.38 million).
**ENDORSEMENT**

**CRICKET**

- Endorsements have de-grown by 17%. Major reason is Messi - Tata Motors deal & Tiger Woods – Hero Moto Corp deals got over.
- Cricket endorsement has grown by 15.5% - Virat Kohli leading from the front with 19 brands & 150+ crore worth of endorsement value.
- PV Sindhu is leading the non-cricket endorsement space with 11 brands and over 30 crore worth of endorsement value.
- Cricketers got total of 90 brands whereas non-cricket athletes got 78 brand endorsements.
- Indian brands looking beyond Indian athletes
  - Kanakia Spaces signed up with Zinedine Zidane
  - MRF, Mont Blanc & Maruti signed AB De Villiers

**OTHER SPORTS**

**TOTAL**

Source – ESP Properties

2016 Conversion Rate 1$ = INR 68
2017 Conversion Rate 1$ = INR 66
## Athletes

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<thead>
<tr>
<th>Athlete</th>
<th>Social Conversation</th>
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<th>Twitter</th>
<th>Instagram</th>
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<tr>
<td><strong>Sunil Chhetri</strong></td>
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</table>

In terms of sheer volume of social conversations, Virat Kohli, MS Dhoni and Sachin Tendulkar ruled the roost. Rohit Sharma, Srikanth Kidambi and Sunil Chhetri were the biggest gainers.

In terms of monthly search volumes, Rohit Sharma takes the cake with 14.1% growth in search volumes in 2017 closely followed by Srikanth Kidambi at 13.6% owing to their on-field performance.

PV Sindhu, R Ashwin and Sachin Tendulkar have been steady across the 12-month window in terms of monthly search volumes. Sachin Tendulkar saw a modest spike in Apr-May-Jun owing to the release of Sachin: A Billion Dreams.

MS Dhoni and Saina Nehwal have de-grown in terms of monthly search volumes over the 12-month window.
How sports has evolved in media

Gone are the days when sports fans – from mildly-interested to crazed fans and everybody in between - eagerly awaited the next day’s newspaper to understand how the match was played, who got out when and relive nail-biting finishes. From the first radio broadcast of a sport in 1921 – a boxing match in Pittsburgh, Pennsylvania – to the first TV broadcast in 1936 of the Summer Olympics, sports broadcasting has come a long way. Today watching (or experiencing) sports has evolved into a much more sophisticated behaviour.

In India, Doordarshan held the sole rights to cricket broadcasting in India till the late 1990s. It was Jagmohan Dalmiya and IS Bindra, representing BCCI, who helped open up cricket rights to private channels. And with that, the sports broadcast business in India exploded.

Today sports advertising across all media accounts for a cool INR 4065 crore, which is 6.6% of total ad spends in the country. Bulk of this advertising is on cricket though other sports like Kabaddi, Soccer & Badminton are seeing increasing traction both from viewers and advertisers.

Television:
Sports spends on TV accounted for INR 3380 cr (12% of overall TV spends) in 2017 and has maintained a steady share over the last 10 years (see Chart 1), increasing in years when ICC World Cup championships were hosted in India.

Chart 1: TV: Sports vs. other programs share of AdEx

Source: GroupM estimates; Rest includes comedy, kids, others
Both the number of sports channels on TV and the viewership of IPL have grown, indicating that TV continues to remain the main medium of choice to watch sports despite digital’s growing popularity (chart 2, table 1).

### Chart 2: TV any channel reach vs. IPL reach (million)

<table>
<thead>
<tr>
<th>Year</th>
<th>Any channel U+R</th>
<th>IPL U+R</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y2008</td>
<td>201</td>
<td>326</td>
</tr>
<tr>
<td>Y2009</td>
<td>229</td>
<td>394</td>
</tr>
<tr>
<td>Y2010</td>
<td>269</td>
<td>430</td>
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<td>Y2011</td>
<td>301</td>
<td>456</td>
</tr>
<tr>
<td>Y2012</td>
<td>306</td>
<td>492</td>
</tr>
<tr>
<td>Y2013</td>
<td>329</td>
<td>514</td>
</tr>
<tr>
<td>Y2014</td>
<td>352</td>
<td>542</td>
</tr>
<tr>
<td>Y2015</td>
<td>363</td>
<td>590</td>
</tr>
<tr>
<td>Y2016</td>
<td>361</td>
<td>617</td>
</tr>
<tr>
<td>Y2017</td>
<td>411</td>
<td>716</td>
</tr>
</tbody>
</table>

Source: TV: BARC (2006-17) & BARC re-estimated for TAM period (2008-15); Any channel reach = Average weekly unique viewers of TV. Total individuals reached by TV is 780mn in 2017. TG: Universe 2+/4+. Market: All India

### Table 1

<table>
<thead>
<tr>
<th>Year</th>
<th>No. of sports channels on TV</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>14</td>
</tr>
<tr>
<td>2014</td>
<td>14</td>
</tr>
<tr>
<td>2015</td>
<td>18</td>
</tr>
<tr>
<td>2016</td>
<td>22</td>
</tr>
<tr>
<td>2017</td>
<td>29</td>
</tr>
</tbody>
</table>

Source: BARC, TG: universe

### Digital:

Digital viewership of live sports events has seen a humongous growth after the entry of hotstar in 2015. Viewership of IPL grew from 28 mn viewers in 2014 to 100 mn in 2016, a growth of 2.6 times.

<table>
<thead>
<tr>
<th>Year</th>
<th>IPL viewership (million)</th>
<th>Platform</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>28</td>
<td>Starsports.com</td>
</tr>
<tr>
<td>2015</td>
<td>41</td>
<td>hotstar</td>
</tr>
<tr>
<td>2016</td>
<td>100</td>
<td>hotstar</td>
</tr>
</tbody>
</table>

Source: industry sources

As per hotstar’s ‘The India Watch Report 2018’, ODI matches saw a 5X growth in watch time between 2017 & 2016 while IPL 2017 witnessed 6.6X growth, Kabaddi 9X growth, opening days of Indian Super League 3.5X growth and opening days of Premier League 10X growth. In line with the explosive growth in digital viewership, sports ad spends has grown from negligible in 2009 to 18% of overall digital spends in 2012 before stabilising at 8-10% over 2016-17 (chart 3). RJio’s entry Sep-16 helped increase time spent on digital as data plans became cheaper and connectivity speeds improved.
Regional rising:

An emerging trend in sports is that it is no longer a metro phenomenon: be it viewership or players or the sport itself, regional flavours are emerging strong, broadening the base for all stakeholders. For instance, states that watched football the most (on digital) in 2017 were Mizoram, Assam, Kerala, Meghalaya & Tripura – none of which contain a top metro. Similarly, Kabaddi garnered higher TV viewership in AP, Karnataka, Maharashtra & MP-CG in 2017 (see table) while non-metros’ share of watch time (on digital) grew from 10% in 2016 to 40% in 2017.

Sports is still cricket but others are getting a foot in the door

Sports viewership (TV) is increasing in rural areas, with kabaddi & soccer more popular. PKL 17 reached 195 mn unique viewers in rural India vs. IPL reach of 193 mn in rural in the same year. Other sports may emerge that capture the imagination of ardent sports fans.
Ad spends on sports other than cricket have been growing well thanks to rising awareness of other sports, international tournaments like the Olympics and BWF events and some good marketing by broadcasters. While badminton has seen TV ad spends grow 6x between 2013-2017, soccer TV ad spends have peaked during FIFA WC years (2010, 2014) by multiples of 5-10x. The competition between different sports for eyeballs and ad monies will only up the quality of the game, leaving the viewer spoilt for choice while uncovering new (or niche) audience segments.

Technology in sports:

Technology has been an integral part of sports probably right from the time sport was invented! That said, here’s a brief roundup of technology currently in use that has allowed viewers to see -literally- finer aspects of the game:

- **Snickometer/Sncko:** It is particularly useful when cricket stadia are noisy (they usually are) and hearing the bat hit the ball is near impossible. A sensitive microphone is placed on a stump at both ends of the pitch and is connected to an oscilloscope that measures sound waves. The sound wave in conjunction with a camera can help the viewer gauge whether the ball nudged passed the bat or pads. It was invented by British computer scientist Allan Plaskett & introduced in cricket in mid-90s. Frequently used by 3rd umpires to decide on difficult-to-judge catch appeals.

- **Hawk Eye:** widely used across cricket, tennis and soccer to visually track the ball and display a record of its statistical path, through movie images. It was developed by Dr. Paul Hawkins from the UK. It involves 6-7 powerful cameras placed under the stadium roof tracking the ball from different angles; the video from all cameras is then triangulated and combined to create a 3D representation of the ball’s trajectory. It is reportedly accurate to within 5mm (0.19-inch) and is trusted as an impartial second opinion in cricket. It was first implemented in 2001 for making television broadcast more interactive.

- **SpiderCam:** It provides a completely new view of action on the pitch. The camera operates on a Kevlar cable attached to four motorized winches positioned at each corner of the stadium. Using a gyro-stabilized carrier, a person can move the remote head with the camera inside into any position. The camera lens can pan, tilt, zoom or focus as needed, providing a comprehensive view of the game.

- **Super Slo-Mo:** uses slow motion technology to show replays – used to analyze run outs or stumpings and has been in use since 2005. Super slow-motion cameras are situated around the stadium record images at 500 frames per second (fps) compared to normal cameras that record images at 24 fps.

**Tech in IPL:** The 2010 IPL used tech innovatively: apart from it being the first time that IPL was broadcasted live on YouTube, it had a FunFeed channel and offered scorecards on mobile phones:

- The FunFeed channel: it ran alongside the live match stream on YouTube as a screen-in-screen. It packaged fun elements relating to IPL, both on and

---

**Reach in mn**

<table>
<thead>
<tr>
<th>League</th>
<th>All India</th>
<th>Urban</th>
<th>Rural</th>
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</thead>
<tbody>
<tr>
<td>IPL 2017</td>
<td>411</td>
<td>218</td>
<td>193</td>
</tr>
<tr>
<td>PKL 2017</td>
<td>313</td>
<td>118</td>
<td>195</td>
</tr>
<tr>
<td>ISL 17-18 (51 matches)</td>
<td>140</td>
<td>65</td>
<td>75</td>
</tr>
</tbody>
</table>

Source: BARC, TG: universe
deliver it to a mobile internet platform within 45 seconds of the live match, thus allowing a fan to literally follow the match ball-by-ball on his mobile. By the end of the tournament, over 25,000 hours of IPL video had been downloaded mobile devices.

And what of the future? Well, technology that allows a more intimate experience for the viewer is just around the corner or already being used:

DATA MINING:

- Optical tracking and wearables are giving fans an insight into athlete performance, for example, the distance run by players and peak speed.
- The NBA has been using SportsVU tracking since 2013 which collects real-time data such as ball possession, player positions.

SOCIAL MEDIA:

- Twitter & Facebook abound with live stats, analysis & reactions on game/match days.

LIVE-STREAM/TRACKING:

- Tour de France 2015 saw riders’ bicycles fitted with a tracking device (using RFID) to provide accurate location data and estimated time gap between riders via a dedicated mobile app. Fans could track riders by nationality, team, top 5 in each category or simply their favourite riders.

- Content distribution from sports bodies & individuals on the rise. Uninterrupted, The Player’s Tribune & Unscriptd are examples of athlete-owned online platforms where fans can access content driven by their heroes.

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Connected Stadium:

- **Seamless in-stadium experience:** NFL has perfected the ‘connected stadium’ where 700-plus wireless access points are provided for fans to scan tickets, locate their seats, access social media, complete food-and-drink orders & engage with adverts

Virtual Reality/AR:

- Broadcasters & teams are using VR to provide fans with immersive experiences so that the latter can experience the ‘live’ atmosphere of a match in the comfort of their own home
- VR was used during the 2016 Olympics & in the 2017 NBA; Fox Sports signed a 5-year deal with VR company NextVR in 2017 to produce and broadcast live sports; closer home, Star India plans to bring VR to IPL fans in 2018
- With rising interest in fantasy sports (football, cricket), participation in virtual sports is likely to become more immersive and bring in more fans
IPL DRIVES MEDIA SPENDS ON TV, DIGITAL TO NEW HIGH

IF 2016 HAD A ‘Cricketwala’ skew when it came to Media Spends, it was even more pronounced in 2017. And while on the subject of skews, what is also clear is that a forward looking assessment made in the India Sports Sponsorship Report 2017 - that in the near future, Digital will overtake Print vis-à-vis Media Spending on Sports, both percentagewise as well as in absolute terms, is on track to come to pass in 2018.

But that is for next year’s Report. In the here and now as it were, while Media Spending in Sport as a whole grew 15.8%, from INR 3511 crore ($516 million) to INR 4065 crore ($616 million), it was driven even more strongly in 2017 by Television On Air, which grew an incredible 42.7%, from INR 2367 crore ($348 million) to INR 3379 crore ($512 million).

As already noted, on TV, Sports Adex is largely driven by Cricket, with other sports contributing a minor share. Within cricket, factored in were aspects such as number of days/match days, number of matches, number of Tests vs. T20s vs. ODIs, ad secondage, ad rate and number of advertisers. While no. of match days remained the same or less between 2016 & 17, the number of advertisers on cricket has increased. This is true for Other Sports as well. The other reason for Sports Adex increasing is the annual increase in ad rates, especially on IPL.

In what has turned out to be Sony Pictures Networks’ tenth and final year as the India broadcaster for BCCI’s Golden Goose, the network signed off on a high note. While viewership was up 13.85%, from 361 million in 2016, to 411 million, ad sales revenues hit the highest ever in IPL’s history. At the end of IPL 10, SPN mopped up INR 1204 Crore ($182.42 million) NET, compared to INR 1020 crore ($154.55 million) in 2016, an 18% jump that is all the more remarkable when viewed in the context of how the post-demonetisation drag on income was still being felt across the media sector.

The drag was evident in stark relief on Print adex, which overall saw a slowing growth in 2017 and this impacted sports adex to an even greater degree. Print contracted by 59.2%, down from INR 874 crore ($128 million) to INR 356 crore ($54 million). It is worth noting that Print adex had managed a 4% upside in 2016.

Of course, the situation also has much to do with more advertisers on sports turning to digital, so Print was seeing a steady decline in any case, but it is fair to say that no one would have predicted such a steep fall at the beginning of 2017.

What Print’s plummet has hastened of course is a faster reduction of the lead it had on Digital than might have happened organically. The difference between Print and Digital was down to just INR 26 crore ($3.94 million) by end-2017 from INR 604 crore ($88 million) the previous year.
Sporting Nation In The Making V / IPL Drives Media Spends on TV, Digital to New Highs

The growth in Digital offers a reality check that while Digital consumption is and will continue growing up massively, Adex increases (as well paid subscription numbers), will follow with a significant lag in absolute terms. Why? Because, as Star India MD Sanjay Gupta told SportzPower in a recent interaction: “We are dealing with very deep-rooted beliefs around ‘why should I pay any money?’”

Gupta further elaborates: “The mindset to pay has to come in. That’s a journey we are on. We will start using IPL to start moving people to subscription. But it’s not a switch on and switch off idea. It’s at least a five-year agenda. We are going in with our eyes open. Primarily, in the first year or two, the value will come through advertising money. From the third year onwards we should be able to start generating reasonable subscription revenues, to keep switching the business model on Hotstar (Star India’s OTT platform).”

Still, it is no small feat that Digital grew by 22.2%, up from INR 270 crore ($40 million) to INR 330 crore ($50 million). And as was the case with TV, ad spends growth has largely been on the back of Cricket, with other sports contributing to a far smaller share. Within Cricket, it is IPL of course which is the key driver.

IPL Digital rights holder Hotstar has not just built revenues on the back of IPL, but driven content consumption as well. As Gupta points out: “The biggest driver for Hotstar was the ICC World Cup in 2015. The number of downloads we got during that singular tournament was one of the most dramatic growths.

“Sports definitely has played a very important role in Hotstar’s growth. First with the World Cup, and then IPL. Cricket has played a very important role in a lot of people becoming aware, talking about it, and telling their friends.”

And Hotstar’s ad sales growth numbers on the back of IPL are nothing less than spectacular. Sample this: In 2015, the first year, that Hotstar leveraged IPL on its platform, it mopped up net revenues of INR 22.25 crore ($3.37 million). In 2016, that figure had telescoped 126.67% up to INR 51 crore ($7.73 million); and closed 2017 up an even more massive 166.67% at INR 136 crore ($20.61 million). For context however, it needs noting that Star paid INR 302 crore ($45.76 million) to the BCCI over the three years it held those rights.

On a concluding note, if 2017-beginning saw the closing of the sale off Zee Group’s TEN Sports Network to SPN for $385 million and the exit of the Subhash Chandra-controlled network from the sports broadcast arena for at least four years, it also came with the announcement on 06 February 2017 of the launch of the Discovery Communications branded DSport. The arrival of a new player in the space a little short of five years after SPN (then Multi Screen Media), launched Sony SIX does not change the ground reality (or should one say On-Air reality) that India is a duopoly between Star and Sony as far as the sports broadcast stakes are concerned. This is because DSport, like the Harish Thawani controlled Neo Sports Broadcast, remain niche propositions in terms of both sports rights properties in their respective portfolios as well as presence.
Media Spends grew by 15.8%.

On TV, sports adex is largely on cricket with other sports contributing a minor share.
The other reason for sports adex increasing is the annual increase in ad rates especially on IPL.

Print adex, overall, saw a slowing growth in 2017 and this impacted sports adex as well.
With more advertisers on sports turning to digital, print has seen a steady decline.

On digital, spends growth has largely been on the back of cricket with other sports contributing
to a smaller share.
The only question is just how much bigger. A 20%+ upside over the INR 7,300 crore ($1.106 billion) that 2017 delivered, at INR 8,760 crore+ ($1.327 billion+), is very much on the cards.

There are two principal drivers that will propel revenues in 2018 and both link back to mega deals involving the IPL that were struck in 2017.

First was the monster deal that Chinese smartphone major Vivo struck in June 2017 to retain title sponsorship rights of the IPL for the next five years (beginning 2018). Vivo’s mind-boggling INR 2,199 crore ($333.18 million) bid translates into a INR 440 crore ($66.67 million) payout a year to the BCCI that kicks in from the 2018 edition. The fact that Vivo chose to bid at a 450% mark-up in incremental value to the INR 196 crore ($29.7 million) it had paid over the two previous years it held the rights suggests that it got full value from its investment. Whether that will still obtain over the coming five years remains a moot point though.

The second of course was in September when Star India beat all comers with a consolidated bid for IPL’s worldwide television and digital rights of INR 16,347.5 crore ($2.48 billion) for the IPL for a five-year period from 2018 to 2022. Broken down, it means that there will be a 367% increase in the monies that go to the BCCI per year over what previous broadcast rights holder Sony Pictures Television Networks India paid in the final year of its ten-year lien on IPL rights. Just these two IPL deals alone would reportedly pump up monies going into the central revenue pool to around INR 3,700 crore ($560.60 million) per season. This is without accounting for any other IPL sponsorship deals the BCCI has struck; which would further bump up monies going into the central pool, and by extension the amount that will go to each team as franchise fees.

Outside of the IPL, the next big “money mopper” for the BCCI could well be around the bidding for the broadcast and digital media rights of all international and domestic cricket matches to be played in India till March 2023. The rights are being awarded for a five-year period starting from 1 April 2018.

Currently, Star India has the India Cricket media rights, for which it agreed to pay INR 3,851 crore in 2012, or INR 43 crore per international game Kohli’s Boys in Blue play.

The rights will be awarded through an online auction. Interested parties can bid for three packages—global television rights plus rest of the world digital rights, digital rights for the Indian subcontinent and a global consolidated rights bid.

BCCI will start the online auction on 27 March at 2pm, with the winning bids to be declared on the same day.

So will it be incumbent Star or will Sony, having had to watch as its rival from the 21st Century Fox stable swiped the IPL rights from under its feet as it were, hit

If 2017 was a BIG year for Sports Sponsorship, coming as it did on the back of the best ever On Air revenues delivered by the Indian Premier League, and solid upsides from all the segments (the blip on Endorsements notwithstanding) that this report tracks, 2018 promises far BIGGER things. Of that we can be certain.
Of the two team sports that have huge potential but have been hobbled by internecine feuding within the respective federations – Basketball and Volleyball – the hoops game is still tied up in legal wrangling but there could well be light at the end of the tunnel for Volleyball.

The Volleyball Federation of India, fronted by VFI secretary general Ramavatar Singh Jakhar, announced plans in February to launch a professional league by mid-year and the signing of a 10-year commercial partnership with Baseline Ventures “to promote Indian volleyball”.

A franchise-based professional Indian Volleyball League is the first project on the anvil. All good except that an identical announcement had been made in February 2016 and nothing came of it. So till said league sees the light of day, “wait and watch” is likely the best option as this report goes into print.

As for Basketball, the internal feuding may be over, but a dispute between the Basketball Federation of India and IMG Reliance, into Year 8 of a 30-year agreement it had signed with the BFI in July 2010 granting it all commercial rights to the Hoops Game in India, is still holding back the launch a franchise-based league.

Conversations SportzPower has had with industry stakeholders indicate that even if IMG-R and BFI can come to the table and resolve their differences, the earliest a big ticket basketball league will make its appearance in India is 2019.

As for Kolkata giants Mohun Bagan and East Bengal and their contention that they should get a special pass into the ISL keeping in mind their history, their performances on the pitch have not helped their case. For two years running it has been clubs with none of the pedigree of either of the two institutions that have won the I-League - Aizawl FC from Mizoram last year and league debutants Minerva Punjab FC this season.

Also, the fact that for two years in a row the I-League went down to the wire before a winner was declared has been a great advertisement for the tournament. Something the mandarins at Football Sports Development Ltd, commercial partners of the AIFF, will have to figure out how best to leverage.

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 backend strong? Without entering into speculation, our opinion is that even if the BCCI gets parity in price to what Star is paying now, the winner would at best have a loss leader in its portfolio.

Moving away from Cricket, the really big deal precursor to 2018 was around the iconic Mumbai Marathon. Organisers Procam International announced last August that the country’s biggest timed distance run was changing its lead partner Standard Chartered after 14 years on the trot. From 2018, the Mumbai Marathon is jointly sponsored by the Tata Group and Tata Consultancy Services for a period of 10 years.

The Title Sponsorship that Tata Sons secured for the Mumbai Marathon was, at INR 30 crore, a 50% higher incremental value than what Standard Chartered paid in 2017, its final year as lead partner.

On the Soccer pitch, the industry expects some definitive clarity around the structure of club Football in India.

And while there can be no cogent argument against the Indian Super league being the top tier league in the country, the I-League has certainly made a case for itself to be seen in its own right as a property worth nurturing and growing.

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The powerboat series, which had Procam International, torchbearers of the distance running revolution in the
country, partnering leading maritime motor sports brand P1 Global will not be returning for a second season following a falling out between Procam and P1 Global.

As for HIL, Hockey India (HI) asserts that the league will return in 2019 following a break that was forced by a clash of dates with the 2018 Indoor World Cup, which ran from February 7-11 in Berlin.

That being said, speculation on the future of the league has been floating for a while now, linked to various reasons, including franchise disinterest and financial viability.

From the team front to the individual stars. It is all about Virat Kohli, with no other names in the frame that can “move the needle” in any meaningful way.

One name that has been making headlines, though too soon to say if it will translate into endorsements, is 21-year-old rising Golf star Shubhankar Sharma.

Though he turned pro in 2013, it is only since November 2017 that the young tyro really hit his straps. That month he had a top-10 finish in the UBS Hong Kong Open, an Asian Tour event co-sanctioned with the European Tour. Two weeks later he came to more notice in the Joburg Open where he finished with a three-stroke win. The event was part of the Open Qualifying Series and the win gave him an entry to the 2018 Open Championship, his first Major championship. The win also earned him full membership of the European Tour.

A final round 62 to win the Maybank Championship in February, an event co-sanctioned by the Asian Tour and the European Tour, lifted him into the world top-100 for the first time. He also took an early lead in the European Tour’s Race to Dubai, earning a place in the 2018 WGC-Mexico Championship.

At the WGC-Mexico Championship Sharma held the lead after the second and third rounds. However, he faltered with a final-round 74 and finished the tournament in a tie for ninth place. It was his first start in a PGA Tour event and his performance not only got the Golfing world to sit up and take notice that here possibly was the real deal, but also got him an invite to play at the US Masters despite his not being in the world top-50.

While overly hasty remarks are already being made that he could be to Indian Golf what Sachin Tendulkar was to Cricket, it is still worth noting that the young talent was marked for big things by Golfing great Ernie Els 10 years ago.

In conclusion, 2018 will be great for Sport. Carrying forward the momentum from 2017, and with the economy also looking up, set to grow at 7.3% in 2018-19, Sports is looking at an even bigger year.

The portents from events across multiple touch points in Sport indicate that Cricket will be massive while Other Sports will also generate healthy ad spends.

On the Ground, even as the industry expects some definitive clarity around the structure of club Football in India, among the new leagues on the horizon, Volleyball holds out much hope.

In the Media firmament, while new revenue benchmarks are expected from Television, it will be traction in the Digital arena that will provide real pointers to where the industry is going over the next few years.

Let the Games Continue!
## SUMMARY

<table>
<thead>
<tr>
<th>Year</th>
<th>2008 in INR Cr</th>
<th>2009 in INR Cr</th>
<th>2010 in INR Cr</th>
<th>2011 in INR Cr</th>
<th>2012 in INR Cr</th>
<th>2013 in INR Cr</th>
<th>2014 in INR Cr</th>
<th>2015 in INR Cr</th>
<th>2016 in INR Cr</th>
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<td>32%</td>
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<td>-1%</td>
<td>9%</td>
<td>16%</td>
<td>19%</td>
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### INR - USD Conversion Rate

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THE LAST WORD

According to the Cambridge Dictionary, Sports is defined as “a game, competition or activity needing physical effort and skill that is played or done according to rules for enjoyment and/or job”. In reality it is a lot more, spanning entertainment, businesses commanding big dollars, sports channels with 24 hours’ content, second and third screens etc.!

Indian sports industry is at an exciting juncture. We have well-established domestic leagues with budding talent across various sports, representing the country at a global level. Over the years, we have moved away from the tag of being a cricket-only nation to a multi-sports nation highlighting the fan affinity and preferences for other sports. The diversity of our country can be seen by the way fans are consuming various sports leagues across television, OTT, and other screens. 2017 was a milestone year on the Sports Sponsorship front as the $1-billion mark was crossed for the first time. “Sporting Nation in the Making” is our endeavor to showcase how the industry is dashing forward and embracing the change.

Indian Sport is on the cusp of a technological transformation. There has never been a better time to be a sports fan. Technology is bridging the gap between physical and virtual live sports viewing experience for fans, and stakeholders are willing to invest to make this happen now.

On the other hand, access to data and insights is delivering greater value, engagement, and credibility to brands. Additionally, the limitless opportunity to show sports content on a variety of platforms provides first-hand experience to the fans. There is a lot more accessibility, customization, and flexibility, and that in turn has changed the rights holder’s potential array of sellable rights. Right holders and organizers are finding it increasingly important to build a personal relationship with fans to provide them customized offerings.

With the surge in sports channels, offerings have become much more targeted. The business model is no longer about reach; rather the economics is becoming more focused on delivering a specific audience for brands.

We hope the report was meaningful and you enjoyed reading it as much as we have putting it together!

Game On!!

Gaurav Vazirani
Sr. Business Director, ESP Properties
GroupM is the leading global media investment management company for WPP’s media agencies including Mindshare, MediaCom, Wavemaker, Essence, m/SIX and Motivator in India, and the outcomes-driven programmatic audience company, Xaxis. Responsible for more than US $108B in annual media investment by some of the world’s largest advertisers, GroupM agencies deliver an advantage to clients with unrivaled insights into media marketplaces and consumer audiences. GroupM enables its agencies and clients with trading expertise, data, technology and an array of specialty services including addressable TV, content and sports. GroupM works closely with WPP’s data investment management group, Kantar, and together they account for almost 50% of WPP’s group revenues of more than US $19B. GroupM delivers unrivaled marketplace advantage to its clients, stakeholders and people.

Discover more about GroupM at www.groupm.com.
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Follow GroupM on LinkedIn - https://www.linkedin.com/company/groupm
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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About SportzPower

SportzPower is the media brand from Sportz Network Pvt Ltd, an independently-owned company operating in the significant areas of media, marketing, and events in India’s fast developing sports industry. SportzPower has established itself as a credible source for current and comprehensive information, knowledge and insight to a targeted audience involved in the business and management of sports. SportzPower’s online and offline properties are designed with an aim to benefit professionals from all sports industry stakeholders in the Indian and international markets, through direct or indirect participation.

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