



ESP PROPERTIES - SPORTZPOWER
INDIA SPORTS SPONSORSHIP REPORT 2017

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FOREWORD

We are glad to bring to you the fourth 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).

This edition examines the happenings in the India Sports Sponsorship market during calendar year 2016, what should have been a run-of-the-mill year, but has turned out to be a defining one in more ways than one.

Let's start at the top. Cricket and the Indian Premier League (IPL) had to contend with two new franchises in the sport's premier tournament and one of the top leagues across all sports in the world. But BCCI did not have to worry much as the appetite for the two-month extravaganza continued and even brought in the moolah, though the edition suffered a backlash and scheduling nightmares due to the severe drought in the Western state of Maharashtra, which is home to two of the eight teams.

While the happenings in cricket were more to do with internal issues affecting the Board and external factors beyond their control, the defining moments were related to the sustenance and growth of the sports ecosystem, which has grown multifold over the last few years on the back of IPL-styled templates.

There was also a doubt among sceptics about the longevity of such leagues which have mushroomed unabated since 2011-12. The problems faced by many of these leagues was no secret and it seemed like it was just a matter of time before doomsday. Year 2016 proved some of them right.

Tennis was the worst off with both the Champions Tennis League (CTL) and the International Premier Tennis League (IPTL) taking huge hits. CTL just disappeared from the calendar, while IPTL stayed afloat with a watered-down version.

Pro Wrestling League (PWL) had to push dates ahead as their finances got affected by the landmark demonetization drive by the Government of India. But we also saw the return of the Premier



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Badminton League (PBL), and two editions of the popular Pro Kabaddi League (PKL).

These multiple changes in the sports landscape would have threatened to derail the growth story, but it is creditable that not only did the industry survive the blips, but sports sponsorship grew a remarkable 19.33% to touch the ₹ 6400 crore/\$ 941 million mark.

This report covers the size of sports industry of India in 4 parts — On Ground Sponsorship, Team Sponsorship & Franchise Fee, 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 volumes), and the On Air reach & TRPs in each of the leagues (IPL, ISL, PKL, PWL, HIL, IPTL) 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 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.

**Please Note: All comparison and percentage growth numbers mentioned in the report are calculated on Indian Rupee.*

BIG STEP UP FROM 2015 SETS STAGE FOR BOOMBASTIC 2017

MAKE NO Mistake, while the headlines around Indian sport in 2016 was dominated by the BCCI's no-win attempts to derail the Supreme Court directed Justice RM Lodha reforms process and that of the larger Indian economy by the disruptions that demonetization engendered, it was a great year for the industry on many fronts. And it promises to be even more so in 2017!



THE NUMBERS DON'T LIE. SPORTS SPONSORSHIP GREW ACROSS THE BOARD AT AN IMPRESSIVE 19.33% IN 2016, TO ₹ 6400 CRORE/\$ 941 MILLION, A BIG JUMP UP FROM THE ₹ 5363.3 CRORE/\$ 825 MILLION GARNERED IN 2015.

While On Ground Sponsorship grew from ₹ 1030.5 crore/\$ 159 million to ₹ 1165.2 crore/\$ 171 million; Team Sponsorship was splendidly up from ₹ 558.2 crore/\$ 86 million to ₹ 699.6 crore/\$ 103 million; Franchise Fees went from ₹ 541.3 crore/\$ 83 million to ₹ 548.0 crore/\$ 81 million; and Endorsements from ₹ 416.4 crore/\$ 64 million to ₹ 476.4 crore/\$ 70 million. The biggest growth driver of course for Sports Sponsorship in 2016 was the Media Spends show. Growing 24.63%, it shot up from ₹ 2816.9 crore/\$ 433 million to ₹ 3510.8 crore/\$ 516 million.

In this Sports 'Happywala' (doffing our cap to Sony's IPL 2016 campaign tag line) year of growth, what stands out clearly is that when looked at through the Cricket / Non Cricket prism, both sides held their collective ends up in driving the industry forward.

In fact, whether On Ground, Endorsement or Franchise Fees, Non Cricket managed to marginally expand "share of monies" over 2015. It was only on Team Sponsorship that Cricket widened its gap (here too marginally) over the rest of the collective pack.

Coming to the country's lead Sport, BCCI's governance issues aside, Indian Cricket was on a high in 2016, both on the field and

off it. The IPL carried forward the momentum from 2015 and soared even higher, both ratings and revenue-wise. India's Money League mopped up ₹ 1020.0 crore+/\$ 150 million+ net in ad sales revenues for Sony Pictures Network India, a good 25%+ over 2015's numbers.

IPL's 2016 season garnered 361 million viewers, as per data provided by BARC. Pertinently, the viewership was not male-dominated, with women (41% including rural) and kids comprising a significant portion of the viewership pie.

It was also a year when India hosted multiple events of international stature – the ICC World Twenty20, the Kabaddi World Cup and the Junior Hockey World Cup.

India hosted the World T20 as well as the Junior Hockey World Cup for the first time, while in the case of the Kabaddi World Cup, its staging after a gap of nine years (last held in 2007) can be put down to Pro Kabaddi League and what it has done to bring India's ancient team contact sport front and center in the nation's collective consciousness.

The sixth edition of ICC's blue riband T20 event was held from 8 March to 3 April. But India's exit in the semis meant host broadcaster Star Sports could not go beyond ₹ 260.0 crore/ \$ 38.24 million net in On Air ad sales revenues. When looked at in another way though, the innovations introduced for World Cup 2015, which saw the first global telecast of cricket in 4K and drone cameras above the stadiums, and India host broadcaster Star giving feeds in regional languages, were carried forward into the 2016 World T20, which incidentally was the first major ICC event produced by ICC TV.

ICC TV, USING 30 CAMERAS AT EACH VENUE, COVERED 48 MATCHES ACROSS SEVEN VENUES IN INDIA.

As for the Kabaddi, it could well be termed the breakout story of 2016. The decision by Star India, Pro Kabaddi League's principal owner, to have two seasons in 2016, worked and how. On the back of a two-season PKL and India's hosting of the World Cup in Ahmedabad, On Ground Sponsorship for the Sport grew a momentous 154%, enabling Kabaddi to drive past Football as the number 2 game in India on the money table in this aspect. Kabaddi generated ₹ 122.0 crore/\$ 17.94 million, up from ₹ 48.0 crore/\$ 7.0 million in 2015.

As for the various other domestic leagues, the new avatar of the Indian Badminton League, rebranded as Premier Badminton League for legal reasons, celebrated its inaugural season with new commercial partners Sportzlive Entertainment.

From reborn to new born. Premier Futsal, a league that looked to channel money into Football's short-form format saw international star power, but could not score any sponsorship revenue. After its debut in July, the organizers declared the tournament would be a biannual event from 2017, with the second season to have two more teams added to the six franchises that made up the first season. For now, the organisers have at least announced season 2 and 'Launch Pad', a nation-wide talent hunt. It remains to be seen what shape the event will take.

On the traditional Football front, the Beautiful Game was pretty much carried forward by the Indian Super League. As for the moribund I-League, after the January launch in Kolkata of the 2015-16 season, where a ₹ 2.1 crore/\$ 0.31 million corpus for

marketing push was announced, there was really nothing much to show on the money front.

And if 2015 ended with exit announcements from the well-run and managed Pune FC, as well as one-season wonders Bharat FC and Royal Wahingdoh, 2016 ended pretty much on a similar note for the I-League. Storied Goan outfits Sporting Club de Goa, Salgaocar FC and Dempo SC exited what they derided as a no-hope proposition.

There was some good news for the I-League at the fag end of the year though, after Chandigarh and Chennai were added to the list of cities with teams when Minerva Punjab FC and Chennai City's participation for 2016-17 season was okayed by the All India Football Federation (AIFF). And with Churchill Brothers back in the I-League, representation from Goa was ensured.

These were likely among the reasons why Football has de-grown by 3.9% in 2016. The IMG-Reliance-Star co-owned ISL did pull in 16 central sponsors, it needs noting, though the vexed issue of lack of clarity around the league structure will continue to hobble the economic transformation of the Football ecosystem in India.

AIFF's commercial partners did put out a roadmap in May 2016 that envisages the ISL as the top rung of a four tier league but that remains suspended as the I-League clubs have yet to buy into it.

And so, as was the case in 2015, questions around a future league system for Football in this country have again got carried over. Expect no answers in 2017 though. AIFF president Praful Patel confirmed in November 2016 that any decision would have to wait until after the Under-17 World Cup India 2017, which will be held in October.

95%



42%

As for Pro Wrestling League (PWL) - 2015's new league phenom – it went AWOL in 2016. The reason given by organizers ProSportify was its timelines were too close to the severe economic disruption caused by the November 8 decision of the Indian government to demonetize ₹ 500 and ₹ 1,000 notes. For the record, PWL2 finally had its run from 2nd January to 19th January.

No such luck for the Champions Tennis League, promoted by Indian great Vijay Amritraj. It never returned for a third season and no explanations were forthcoming. As for the International Premier Tennis League, backed by tennis doubles ace Mahesh Bhupathi, a severely curtailed third edition was delivered with the promise that IPTL would bounce back in 2018.

Clearly, 2016 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 was clearly with Virat Kohli, who is setting new benchmarks and breaking records by the day. And while Indian Cricket remains about the triumvirate of Kohli, MS Dhoni and Sachin Tendulkar, the Indian captain in all formats is today in a league of his own.

Move off Cricket, and there was the hammer blow (or should that read reality check) that the 2016 Rio Olympics delivered to national pride. The Silver lining (literally and figuratively) was provided by PV Sindhu in Badminton. The two other women who dominated the Rio narrative were Sakshi Malik in Wrestling and Dipa Karmakar in Gymnastics.

27%

76%

13%



Out of the Rio debacle, some good has certainly come. Prime Minister Narendra Modi has taken a personal interest in the government's decision to develop a plan that encompasses the next three Olympics. This also entails bringing due process into the system and more accountability for the mandarins who have been having a field day of it at the various national federations.

Speaking of accountability, even as the Supreme Court has cut the power brokers in the BCCI and its affiliates down to size, the day does not look too far before all the sundry associations and federations that run sport in this country, and compared to which our cricket establishment is the epitome of probity and good management, will also be brought to heel.

Returning to the financial discourse, even after accounting for the challenges that 2016 threw up, the picture certainly looks bright. It was Team Sponsorship that helped Cricket widen the gap, while other sports not only stood its ground but even expanded, albeit marginally, their share during the year through solid performances, whether it was On-Ground, Endorsement or Franchise Fees.

All of this forms the preamble for the fourth edition of the ESP Properties - SportzPower India Sports Sponsorship Report.

The Report examines advertising investments in Indian Sport in the calendar year 2016 from four angles – On Ground, Team Sponsorship & Franchise Fee, Athlete Endorsement, and Media Spends – while also noting how franchise revenues impacted the overall sponsorship pie.

As stated, Sports Sponsorship grew across the board by an impressive 19.33% in 2016, to ₹ 6400.0 crore/\$ 941 million, a big jump up from the ₹ 5363.3 crore/\$ 825 million garnered in 2015, and comparing brilliantly well to the 11.89% growth in overall ad spends the Media Sector as a whole registered in the year to stand at ₹ 55671.0 crore/\$ 8187 million

And while demonetization has hit overall ad expenditure in 2016, the Sports sector has been able to ride the storm more than well.

Summing up, with ad spending in India touching ₹ 55671.0 crore/\$ 8187 million in 2016, Sports Sponsorship therefore makes up 11.5% of the overall advertising pie.

It also bears noting that the Sports Industry Data provided in this report DOES NOT include:

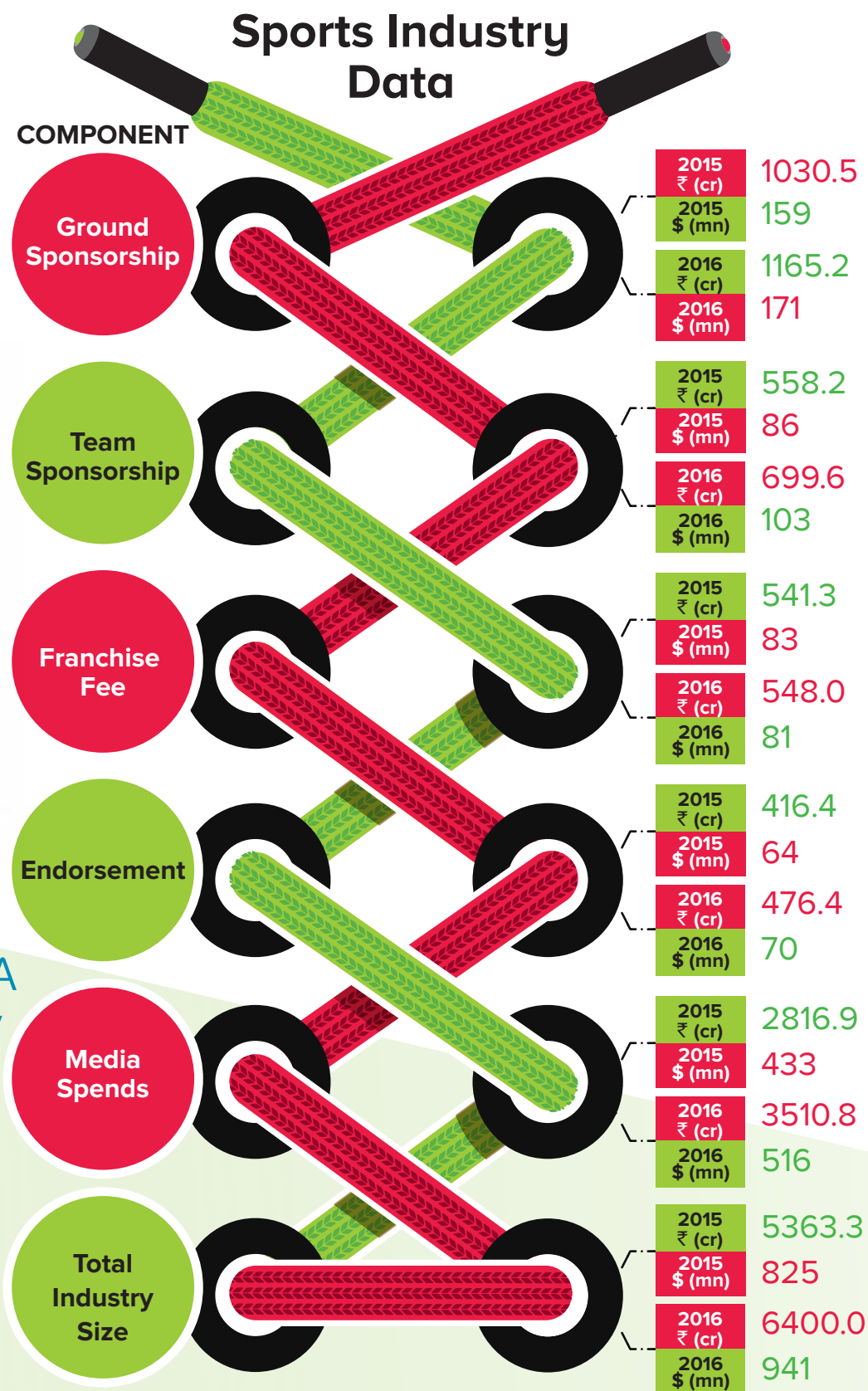
- Gate Receipts
- Players Fee / Salary
- Prize Money
- Merchandising
- Subscription
- Sports Goods
- Operational Costs





SUMMING UP,
WITH AD SPENDING IN INDIA
TOUCHING ₹ 55671.0 CRORE/
\$ 8187 MILLION IN 2016,
SPORTS SPONSORSHIP
THEREFORE MAKES UP
11.5% OF THE OVERALL
ADVERTISING PIE.

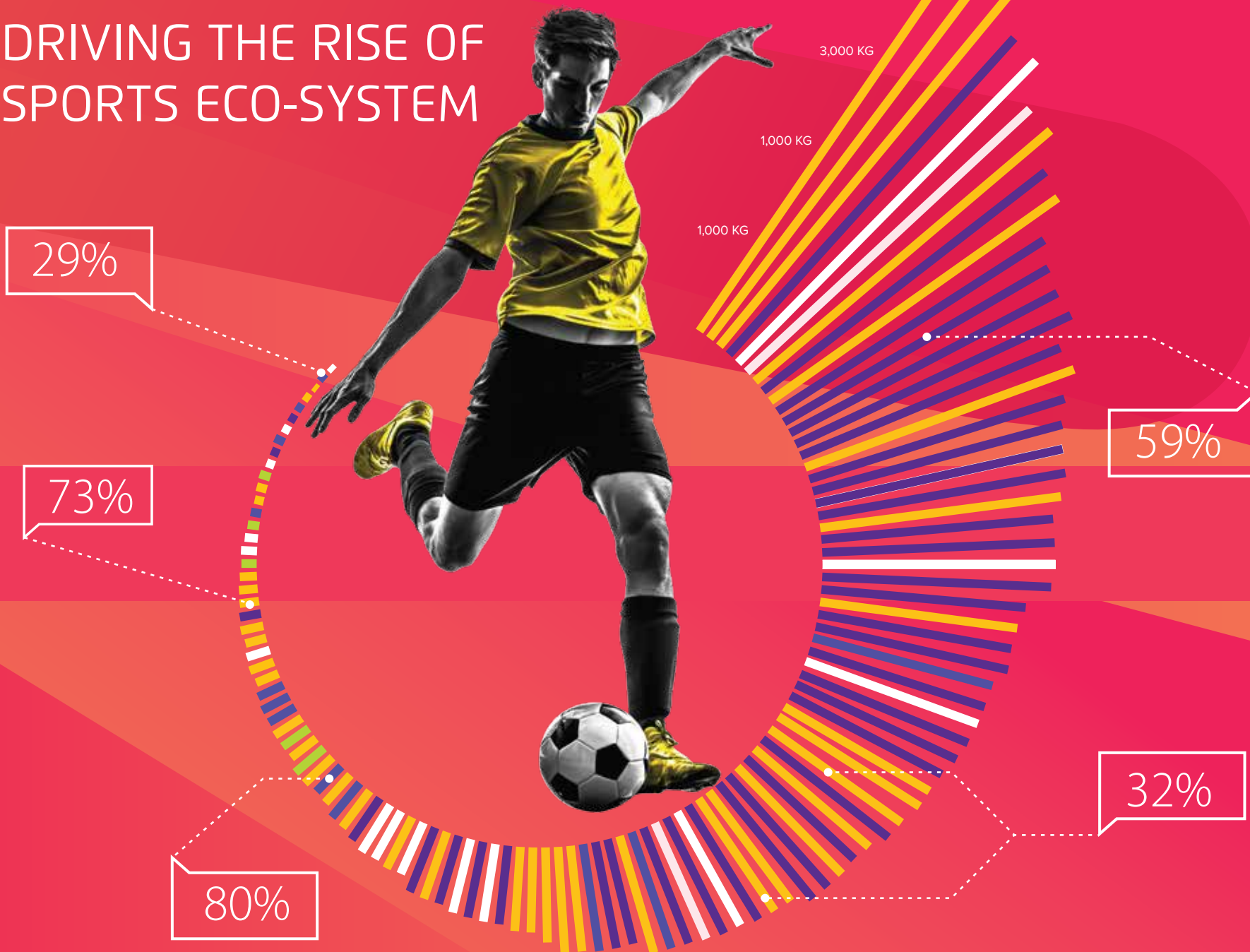
Source – ESP Properties
2015 Conversion Rate 1\$ = ₹ 65
2016 Conversion Rate 1\$ = ₹ 68



Sports Sponsorship grew by 19.33% | Sports Sponsorship size 11.5% of AdEx

DATA AND TECHNOLOGY

DRIVING THE RISE OF
SPORTS ECO-SYSTEM





Ramakrishnan
Subramanian,
CEO Sports Mechanics

In this day and age, there's a dire need for deploying data and technology to revolutionize the way the sport is organized, played, analyzed, and experienced.

Following the best practices from other industries and with the influence of sports in the West, the sporting guild in India is indeed embracing the speed that technology and data brings, and focuses on not just enhancing both the on and off-the-field performance, and reducing the operational outflow, but, most importantly, addressing the governance - eliminating the risk of losing critical data that could be used for the development and promotion of the sport, and driving the new-age sports experience economy.

A NEW STANDARD...

Over the last decade, the sports enterprises have seen a huge transformation in the operational segment by deploying state-of-the-art technologies to take complete control of the off-field activities in a smart way, like digitizing the player registration system, age verification, player profiling, scoring, drawing tournament schedule, managing match official postings and allocations, social amplification, and many more.

This indeed has helped the sporting organizations in decision making on everything from sporting development to promotion of the sport – marketing techniques, and creating new revenue streams.

TRANSFORMATION OF SPORTING ORGANIZATIONS...

On the operational side, the data helps in resource optimization, and prevent from taking biased decisions when drawing match official posting and allocations. And, the tournament scheduler helps in eliminating excess spend on logistics by identifying the closest facility for both the teams, and most importantly, minimizes the fatigue level of players by reducing the travel time during tournaments.

THE VALUES OF DATA, DIGITAL AND SOCIAL PROPERTIES ARE PRICELESS...

Likewise, on the marketing front, cashing in on game data gives sports organizations an extra edge to create additional revenue streams. And, allowing the organization to seamlessly expand their efforts of sports development by exploring new avenues – social, mobile, and digital.

The digital and mobile solutions are a great boon to bring the eco-system closer – allowing the communication and collaboration to happen from anywhere, at any time, and on any device. The new age mediums help in serving the consumers and fan by delivering an unprecedented second screen experience for the mobile user and socialites.

THE NEXT-GEN FAN ENGAGEMENT

We now leave huge digital footprints, the collection of a fan's browsing history, travel habits, social networks, and many more are the cues to convert sceptics to fence sitters, and fence sitters to consumers. By leveraging the digital, mobile, social, in stadia, and fan park channels, the sporting organizations are unconditionally serving consumers with game data content and alluring them to associate with their brand lifestyle round the year.



The orchestration of the fan journey is incredibly complex given the expectations and preferences associated with each channel. The sporting organizations have realized that the integration of digital and offline experience is non-negotiable. And, most importantly, with the interesting game stats combined with videos should chase fans instead of fan chasing the information.

TOWARDS THE DEVELOPMENT OF SPORT

Failure to design a Data Management CoE may result in underperformance. Today, majority of the sporting organizations are considering data and video as the primary components to support their decision in talent identification, development, and monitoring and selection process.

The sports guild in India have seen a substantial transformation in the method of coaching – moving from naked-eye to video based coaching, and now inching towards ‘data driven coaching’, allowing the coaches to identify and nurture the primary skills of an athlete and also develop new skills based on athletes’ interest and suitability. With this new-age data driven coaching technique, an athlete could easily seek opinion from experts across the globe – this again proves the supremacy of internet and importance of sharing video data.

With the power of advanced data analytics combined with videos, athletes have better understanding of their strengths and weakness and are making smart plays to stay ahead of their competitors.

The franchise owners, selectors and coaches are moving from gut-based decisions and leaning towards data to draw the best team combinations and to measure player’s on-field and of field value. The data and technology add a quantitative and objective layer in the auction strategy and execution.

What’s next in coaching? An automated image processing data collection tool that simplifies the effort of a coach to analyses data and making quick informed decision.

Without a doubt, it is becoming very clear that technology and data play a vital role in skill acquisition and reduces the athlete development life cycle. It is not just a number game – how it is packaged and positioned in the athletes’ subconscious mind using new age technologies like AR/VR resulting in better execution.

94%

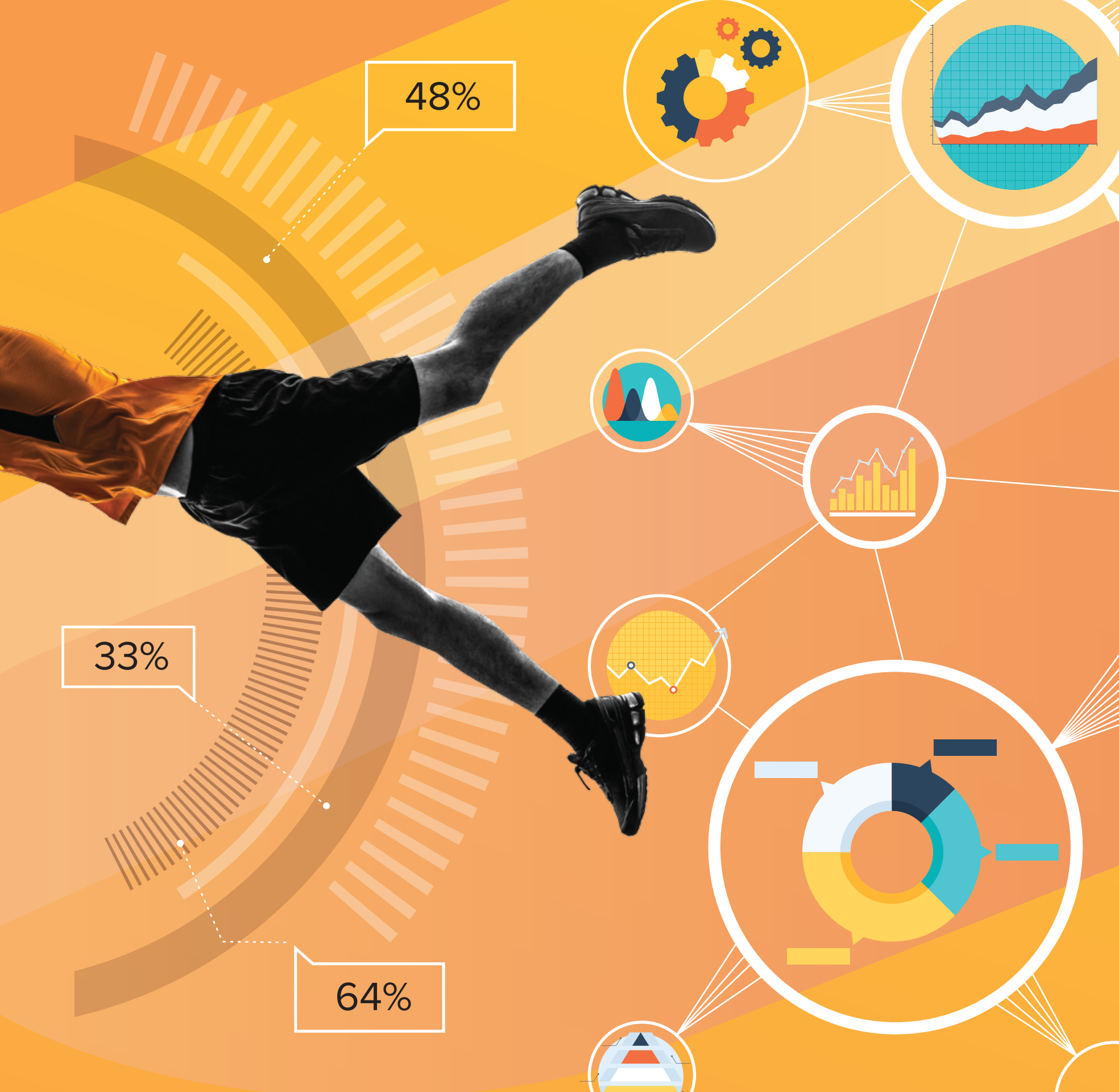


WEARABLES AND SENSORS – DRIVING THE NEW AGE DATA FEEDS

The wearables and sensors have brought in a new dimension to the entire sports ecosystem. The wearables and sensors unlock hidden data of athletes in terms of performance, workload, technique and wellness. The wearables, beacons, etc. can be a great way to enhance the fan experience inside the stadium. The data feeds from all these sensors and chips can be collated from various sources and mined for actionable insights. Virtual Reality can change the way fans experience sport making it more immersive even from a remote location.

59%





48%

33%

64%

KABADDI TAKES UP THE BATON

KABADDI-KABADDI-KABADDI... From floating, literally, on Cloud 9 in 2015 to soaring even above Cricket in terms of absolute numbers added to the Sports Sponsorship pie, India's ancient contact team sport was THE story of 2016.

It says something that in a year that saw the Indian Premier League build on the momentum from 2015, when India hosted the ICC World T20 for the first time, and the inaugural Tamil Nadu Premier League proved a success, it was Kabaddi that was the Ground Sponsorship growth driver of 2016, more than Cricket.

If Ground Sponsorship grew a healthy 13%, from ₹ 1030.5 crore/\$ 159 million in 2015 to ₹ 1165.2 crore/\$ 171 million in 2016, and while Cricket added ₹ 33.2 crore/\$ 4.88 million over its numbers in the previous year, it was Kabaddi that bulked up the coffers even more with ₹ 74.0 crore/\$ 10.88 million in additional accruals.

Where and how did Kabaddi make its numbers? The decision by Star India, Pro Kabaddi League's principal owner, to add another season was the biggest contributing factor. On the back of a two-season PKL and India's successful hosting of the World Cup in Ahmedabad, On Ground Sponsorship for the Sport grew a momentous 154%, enabling Kabaddi to drive past Football as the number 2 game in India on the money table. Kabaddi generated ₹ 122.0 crore/\$ 18 million, up from ₹ 48.0 crore/\$ 7 million in 2015.

The Kabaddi World Cup generated approximately ₹ 20.0 crore/\$ 2.94 million in sponsorship monies with Amazon, Patanjali, Syska, Volini as Associate Sponsors, and Thumbs Up, Skill India and Nissin as Official Partners.

As for PKL, the league generated ₹ 100.0 crore/\$ 14.7 million split between its two seasons with 15 central Sponsors on board, 6 of which stayed invested across both seasons.

First season Sponsors brought in ₹ 45.0 crore/\$ 6.62 million, with Associate Sponsors Gionee, State Bank of India, Bajaj Electricals, TVS, Flipkart committing ₹ 6.0 to ₹ 8.0 crore/\$ 0.88 to \$ 1.18 million per sponsor and Official Partners Fair & Lovely Men, Nissin, Britannia, Pepsi, each putting up ₹ 4.0 to ₹ 5.0 crore/\$ 0.59 to \$ 0.74 million.

On the other hand, in the second season, though the rates remained unchanged, a higher Sponsor count meant ₹ 56.0 crore/\$ 8.24 million was generated through Associate Sponsors Gionee, State Bank of India, Bajaj Electricals, Fogg, Amazon, Airtel and Official Partners, Fair & Lovely Men, Nissin, Britannia, Bisleri, Munch Nuts, Castrol.

That these numbers were achieved without a Title sponsor, as Star India refused to budge on its asking price of ₹ 25.0 crore/\$ 3.68 million per season, is even more remarkable.

PKL's owner roster of high profile names like Kishore Biyani of Future Group, Hindi film A-lister Abhishek Bachchan, steel major Mukund Group's Rajesh Shah, Uday Kotak of Kotak Mahindra, and Ronnie Screwvala's Unilazer Sports, are clearly laughing all the way to the bank.

Returning to the Ground Sponsorship scenario big picture. The great going by Kabaddi notwithstanding, Cricket remains the heartbeat of Indian Sport and it was beating strongly in 2016. On the governance front, under the watchful gaze of the Supreme Court, as well as on the financial front across all arenas – on field and off.

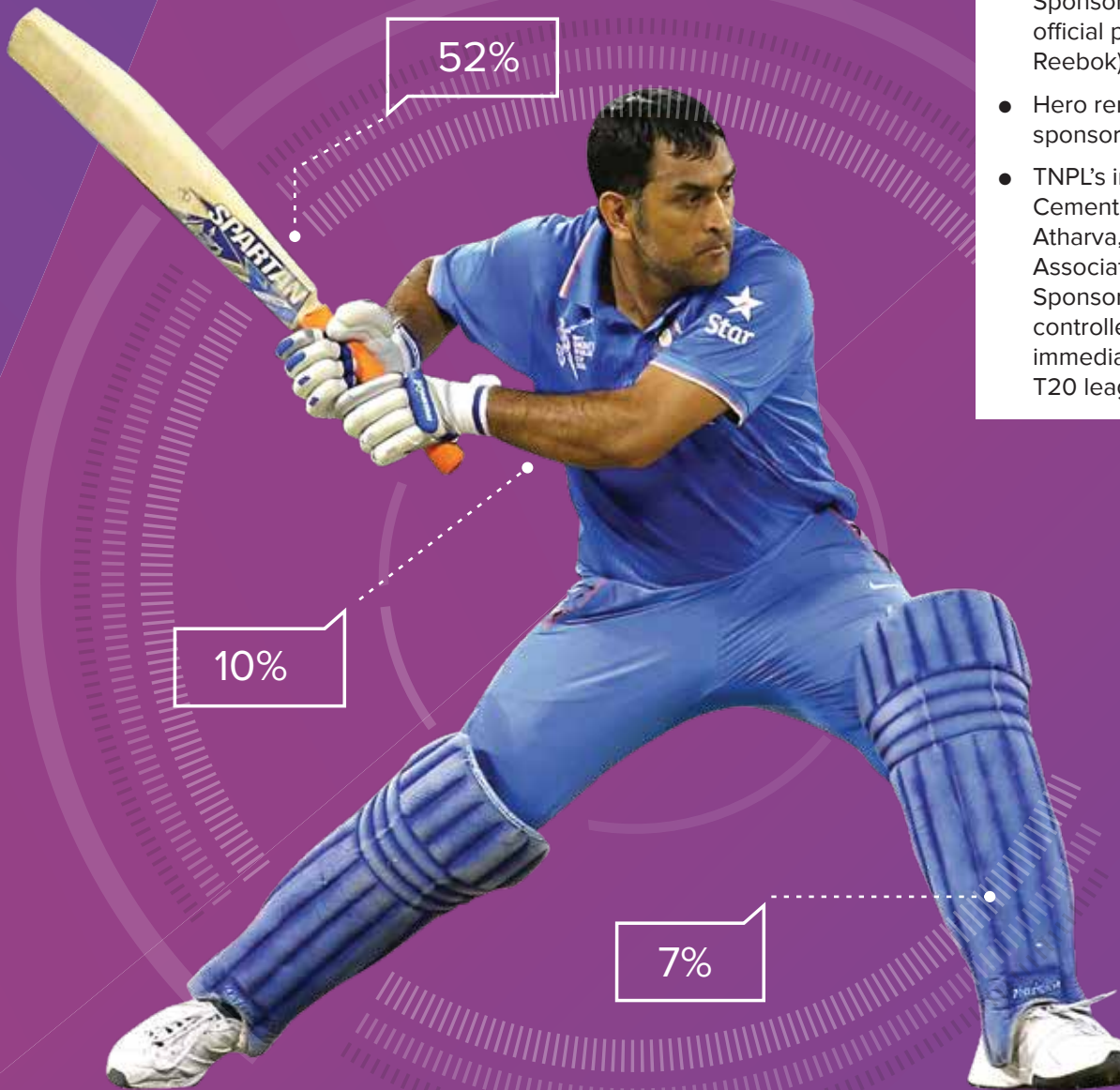


The first portents of the changes coming in Cricket governance was the appointment of a professional chief executive for the first time in the BCCI's history. Former Discovery India head honcho Rahul Johri's start to his cricket innings was understated, and in keeping with his earlier style of management at the US network. But by the time the New Year came around, and the Supreme Court had wielded its scythe through the power corridors of the world's richest cricketing body, Johri was the man running the show in tandem with the Committee of Administrators appointed by India's apex judicial institution.

And while there was much media chatter through the year about how the country's top court was indulging in judicial overreach vis-à-vis the only really well-managed sporting institution in the country, and that it could well kill the golden goose that was Cricket, the first two months of 2017 have belied all the doom and gloom mutterings.

Some key factors determining Cricket's deliveries - positive and negative - were:

- India Played 17 matches at home in 2016 vis-à-vis 12 matches in 2015
- BCCI added 3 Associate Sponsors - Pepsi, Hyundai and Jana Financial Services – that collectively drew ₹ 1.6 crore in additional revenues per match
- Asia Cup format changed to T20 from the earlier 50-over ODI
- IPL - Star (Official Partner) & USL (Umpire Sponsor) sponsorship got over. Maruti Suzuki (Official Partner) & Freecharge (Official Partner) added to sponsorship roster
- ICC signed up new sponsors – Nissan, Oppo and MRF (partnership renewal till 2020) as Global Sponsors and MoneyGram (association extended) as Official Partner. In 2015, world cricket's governing body had 4 Global Sponsors (MRF, Pepsi, LG, Reliance Mobile) and 4 official partners (Hyundai, Castrol, MoneyGram and Reebok)
- Hero renewed Caribbean Premier League title sponsorship, paying \$ 2.5-3 million
- TNPL's inaugural season was successful with India Cements as Title Sponsor, along with Equitas Bank, Atharva, Nandu Lungi, and Krishna Mines & Coke as Associate Sponsors. With ₹ 7.5 crore of Central Sponsorship revenue generated, the N Srinivasan - controlled Tamil Nadu Cricket Association has immediately laid claim to owning the richest state-level T20 league in the country.



As for the 2016 deliveries, India's Big Daddy sport grew 6.27% in 2016 at ₹ 562.7 crore/ \$ 83 million, up from ₹ 529.5 crore/ \$ 81 million in the previous year.

Coming to Football, the third season of the Indian Super League saw average attendance in stadiums drop from last year, even though the quality of play was better and there was heightened buzz around the league on social media.

In terms of spectators at match venues, in total 1.28 million people attended the 61 matches that made up the ISL tournament, with average game attendance for the tournament down from 26,376 in 2015 to 21,003 in 2016. What needs to be noted here though is that two of the eight franchises – Atletico De Kolkata and Mumbai City FC – shifted their home base to smaller capacity stadiums in 2016, thereby massively reducing turnout by 72% and 67% respectively.

For ATK, the change was forced as Salt Lake stadium, selected as one of the six venues for the Under-17 World Cup in India, was undergoing renovation. So too was the case of DY Patil Stadium for Mumbai City.

On the money front as well, India's second biggest Sport by attendance and competitive participation, Football has de-grown by 3.9%, despite the fact that a high-on-international star names Futsal league got added to the mix in 2016.

Despite multiple hiccups, Premier Futsal went ahead and conducted a decent first edition. The organisers have been saying that the second edition will be much bigger. That remains to be seen, but they have already launched a nationwide talent hunt and announced the second season with a press conference in New Delhi.

Returning to the IMG-Reliance-Star co-owned ISL, it pulled in 16 central sponsors for its 2016 edition, down 2 from the 18 that had signed on in 2015. However, it needs noting that in the second rung Associate Sponsor category (₹ 6.0 crore - ₹ 8.0 crore/\$ 0.88 million - \$ 1.18 million), one additional brand came on board, taking the tally to 4 while a new Partner Plus category (₹ 5.0 crore - ₹ 6.0 crore/\$ 0.74 million - \$ 0.88 million) that has been

slotted between Associate Sponsor and Official Partner (₹ 4.0 crore - ₹ 5.0 crore/\$ 0.59 million - \$ 0.74 million) was added in 2016.

So the Sponsor roster reads as Title Sponsor Hero MotoCorp (₹ 18.0 crore/\$ 2.65 million), 4 Associate Sponsors, 1 Partner Plus, and 10 Official Partners.

On the back of ISL, therefore, Ground Sponsorship for Football stood at ₹ 109.5 crore/\$ 16 million, down 3.9% from the ₹ 114.0 crore/\$ 18 million raised in 2015.

Among the other sports, Distance Running as a lifestyle activity continues its steady upward trajectory with Marathons showing a 8.7% year-on-year revenue increase from ₹69.0 crore/\$ 11 million to ₹ 75.0 crore/\$ 11 million.



Of the two franchise-based leagues Tennis served up in 2014 and 2015 –the International Premier Tennis League, promoted by tennis doubles ace Mahesh Bhupathi and the Champions Tennis League, headed by former Indian great Vijay Amritraj– IPTL managed to return for a third season, but CTL died a quiet death.

IPTL title sponsor Coca-Cola, which took title rights for a reported ₹ 20.0 crore/\$ 2.94 million in 2014, reworked its agreement, becoming a 10% stakeholder in 2015.

The exit of CTL was responsible for a 17% Sponsorship drop in Tennis, from ₹ 47.0 crore/\$ 7 million to ₹ 39.0 crore/\$ 6 million.

There was some good news for Tennis fans as well. The contract for the Chennai Open, between IMG, IMG-Reliance and the Tamil Nadu Tennis Association, which came to an end with the 2016 edition of India's only ATP250 event, was renewed for a further three years with the support of the Tamil Nadu government, sponsors Aircel, and state-owned enterprises. The deal means that the event stays in Chennai till 2019. But with the demise of the chief minister, J Jayalalithaa, who was a supporter of the event, there could be a shift in stance from the new CM and it remains to be seen how the unstable political situation in the state will affect the event.

Returning to IPTL, if Bhupathi managed to deliver a severely curtailed third edition despite challenges, the sleeper hit of 2015 –Pro Wrestling League– delayed its appearance till just after the New Year, the disruptions caused by demonetization being the stated reason.

Taking up some of the slack left by the absence of PWL in the Other Sports category was the rechristened Premier

Badminton League (for legal reasons). What was in its original avatar the Indian Badminton League returned after a two-year no show.

The main contributor to the Other Sports category remained the Hockey India League, which announced a new title sponsor in public sector undertaking, Coal India, after Hero MotoCorp pulled the plug on its title rights to HIL. It needs noting that while Hero was contributing ₹ 7.0 crore/\$ 1.03 million to HIL's coffers via its lead sponsorship, Coal India has signed on for ₹ 5.0-6.0 crore/\$ 0.74 – 0.88 million.

HIL and PBL were the two principal contributors driving On Ground Sponsorship in Other Sports upwards by 15% in 2016 to a solid ₹ 257.0 crore/\$ 37.79 million, from ₹ 223.0 crore/\$ 34.0 million in 2015.

Providing some additional thrust was the news that after years of internecine feuding, Indian boxing was back on track as the freshly re-minted Boxing Federation of India got back full membership from world body AIBA.

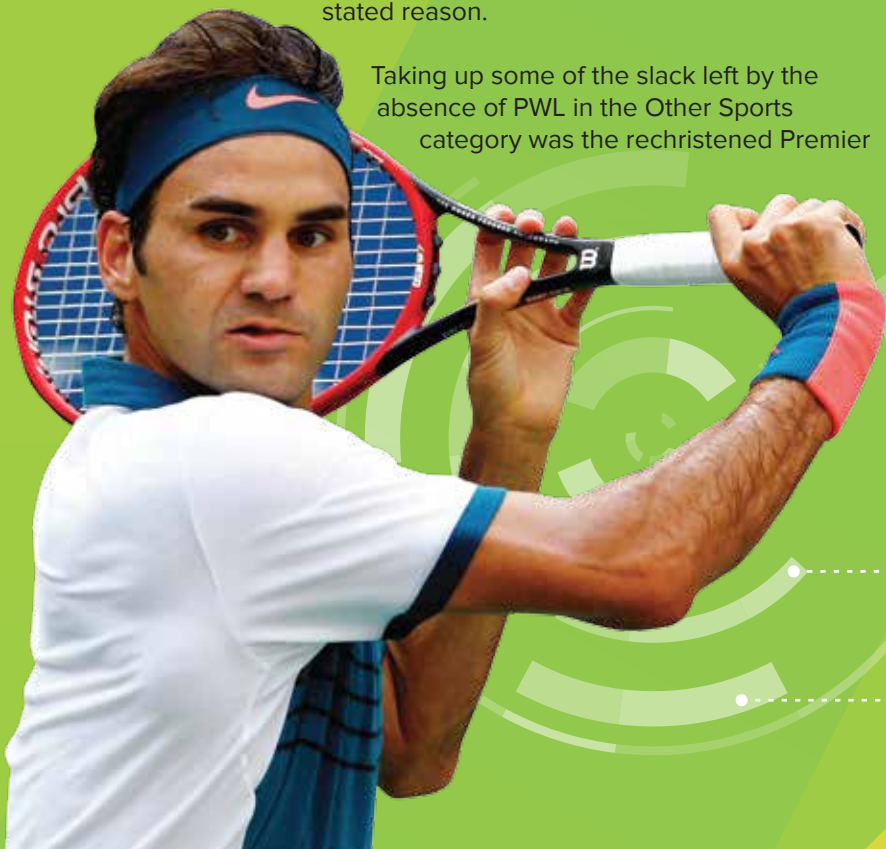
As for one "stallion" who had bolted before the gloved sport's Augean stables could be cleaned up, Indian boxing's poster boy Vijender Singh's decision to turn professional brought back the smiles to home fans, with his promoters also announcing plans for the as yet undefeated pro to have bouts in countries other than the UK and India – maybe China and Dubai.

Expect 2017 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 – Table Tennis being a notable one.



33%

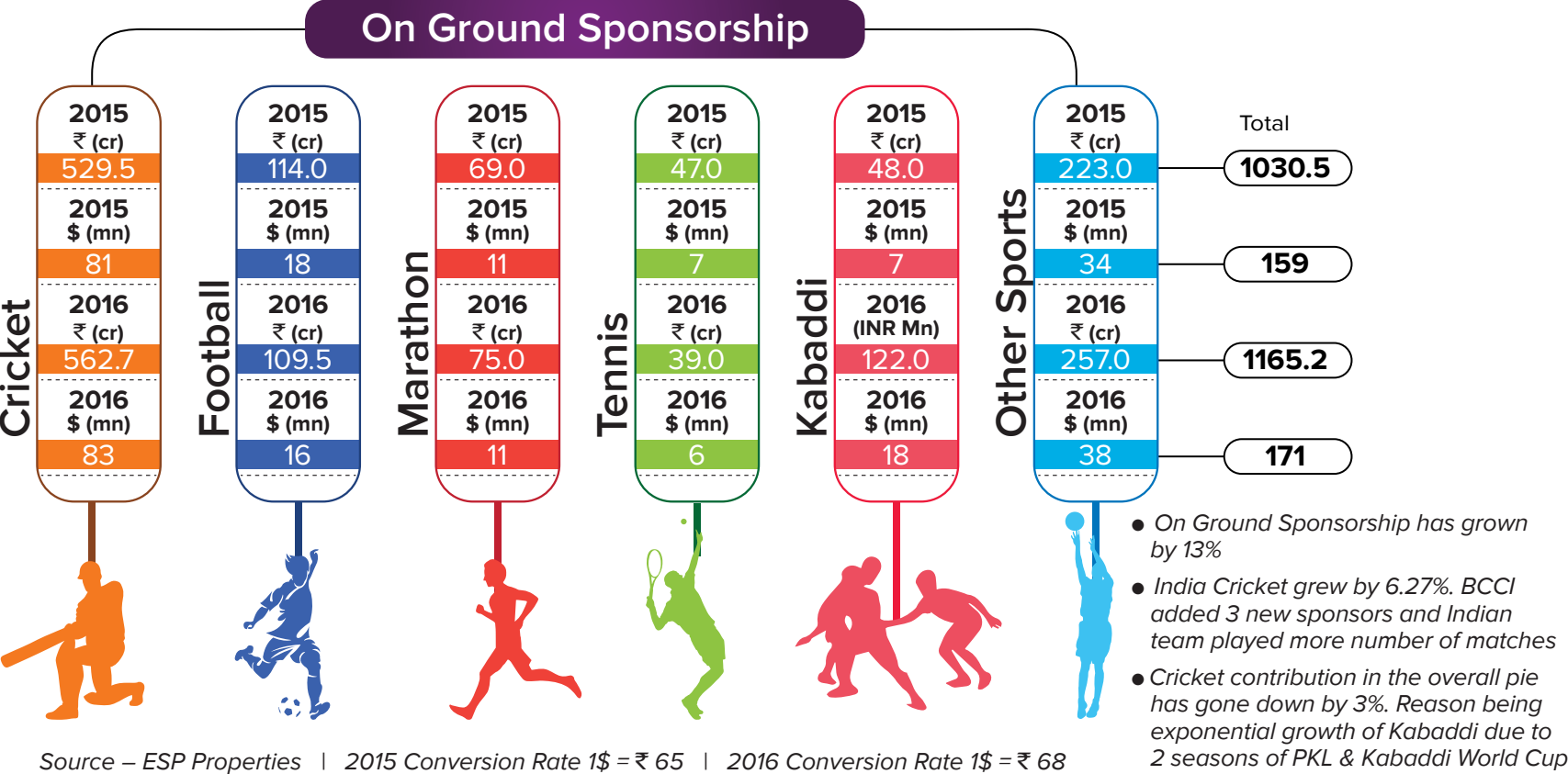
92%



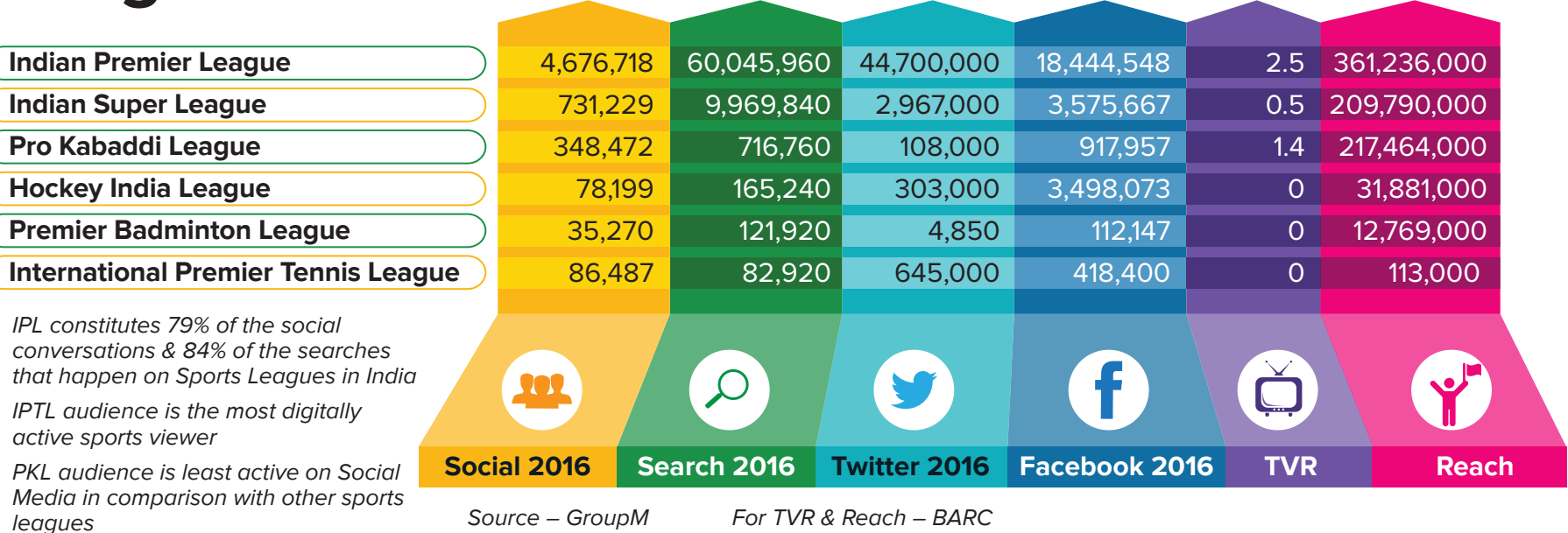
79%

55%

On Ground



Leagues





INDIAN SPORTING LEAGUES

FROM THE LENS OF A CONSUMER



IRVINDER KAUR,
Managing Partner –mConsult,
Marketing and Media
Consulting Arm of GroupM

India's Sports Environment is going through a significant change. As of Feb 2016, the government accorded an Industry status to sports infrastructure, which is expected to attract investments from the private sector, thereby not limiting its role to just CSR activities and Non-Profit Organizations such as Olympic Gold Quest.

Cricket continues to dominate Indian Sports, though advertisers, viewers and broadcasters have gained interest in other sports like kabaddi, football and badminton. Keeping IPL as a benchmark model, many sports leagues have sprung up in the past few years attracting more sportspersons, viewership, broadcasters and sponsors into the business of sports in India.



INCREASING VIEWERSHIP, SPONSORSHIP AND PARTICIPATION IN SPORTS OTHER THAN CRICKET

Cricket dominates the sports market in India, though the country has also embraced other sports with a lot of zeal and enthusiasm. During 2013-15, eight major leagues were started; these include ISL, PKL, Premier Badminton League and Hockey India League. While some of these events tasted instant success, few fell short of gaining adequate traction amongst viewers, advertisers and broadcasters. ISL and PKL have witnessed a steady rise in the average ratings year on year. But these two put together still fall short by a fair margin in comparison to their elder sibling i.e. IPL.

Sponsorship Money raised by other sports is also on the rise. On Ground sponsorships for the newer leagues have increased gradually over the years.

Such sports leagues have brought to the limelight talented sportspersons, who were otherwise largely unnoticed. Moreover, the amount of money that sportspersons earn, serves as an encouragement for several players to pursue a career in sports.



KEY TRENDS DRIVING SPORTS CONSUMPTION:

INCREASING ONLINE CONSUMPTION OF SPORTS

Despite India having the lowest average fixed-line internet connection speed in the region, young digital audiences are increasingly favouring online streaming of sports events over watching them on TV, as the online option gives them flexibility of time and space. This is courtesy rapidly increasing smartphone and internet penetration in India.

To cater to this growing trend, several broadcasters have developed the required capabilities through platforms like Hotstar and Sony Liv amongst others. The proof of concept was delivered in 2016 when Hotstar garnered 100 million audience for their LIVE IPL broadcast. The programming on Rio Olympics by Hotstar was also commendable.



GROWTH IN RURAL VIEWERSHIP NUMBERS

Broadcast Audience Research Council (BARC) India reported that the rural contribution to the number of impressions was as high as 45 % in the sports genre. This trend is consistent across all new sports leagues too.

High levels of interest in rural areas are indicative of the potential in rural sports offering. With Star India placing its hope on Kabaddi and Sony Pictures Network on Wrestling the broadcasters too are vying to woo the rural viewership. The interesting part here is that they are trying to present these predominantly rural sports with an urban packaging and have seen a significant traction.



ISING IMPORTANCE OF TECHNOLOGY AND DATA:



Technology has gradually made its presence felt through applications across the entire value chain of Sports business. Be it to enhance and correct game related decisions OR digital media usage by broadcasters to reach out to an increasingly tech savvy audience through internet and mobile applications OR virtual advertising in LIVE telecast to make brands a part of the on-ground bandwagon virtually.

Sports-persons have since long been leveraging technology to improve their performance and analyze opponents games/strategies.

ENGAGEMENT THROUGH SOCIAL MEDIA



Like other sectors, social media is acting as a game-changer in the sports sector too. It is working as a catalyst in harboring the interest of the fans globally. By engaging fans through social media, sports right holders have discovered new communication channels with their audience that help them to increase the engagement level. This also helps in increasing the brand affinity and loyalty to customers. Moreover, a large number of sports-persons also use the medium to connect with their fans and endorse their brand affiliations.

GROWING FEMALE VIEWERSHIP

In India, sports viewership is no longer male dominated, as females and kids comprise a significant portion of the viewership pie. Capitalizing on this growing trend, a few advertisers and sponsors have taken the leap of faith. For example, Zivame tied-up with U Mumba, to support a cause "Outlining the need to safeguard the dignity of women". To promote "Nayi Soch" Star India collaborated with the BCCI to highlight the importance of mothers in our lives.

Teams and Sports associations are also aware of this fact and are trying to attract the attention of female viewership and fandom. Parallel tournaments are being organized for women, case reference being ICC T20 World Cup and Pro Kabaddi League.



CONCLUSION

India has a long journey ahead on its path to developing a strong sports culture. The ongoing developments indicate a promising future, with the rising number of sports start-ups, increasing number of marathoners and cyclists in the country indicating a clear trend of growing consciousness about health and fitness. The success achieved by league-based events across multiple sports indicates a strong potential for us to consume sports other than cricket. This also encourages more and more people to consider sports as a profession. Coupled with increasing participation from corporate houses and various schemes introduced by the government, India's future is brightly lit with an inclusive effort from all the stakeholders with consumers being at the heart of the enaissance.



PKL FROM THE EYES OF THE CONSUMER

REASONS FOR INTEREST IN PRO KABADDI LEAGUE



IT IS EXCITING
& VIBRANT
AND FUN TO
WATCH

I USED
TO PLAY
KABADDI

I LIKE TO
WATCH OTHER
GAMES

GOOD
PLAYERS

ENJOYMENT &
GOOD GAME

BEST/
FAVOURITE
TEAMS

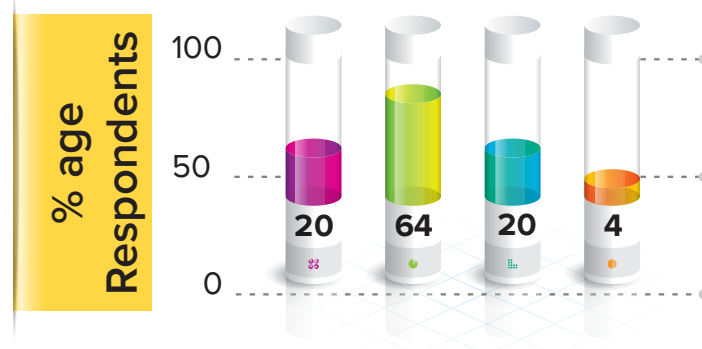
IT'S OUR
COUNTRY'S
GAME

SHORT
FORMAT

ITS A FAST
PACE GAME

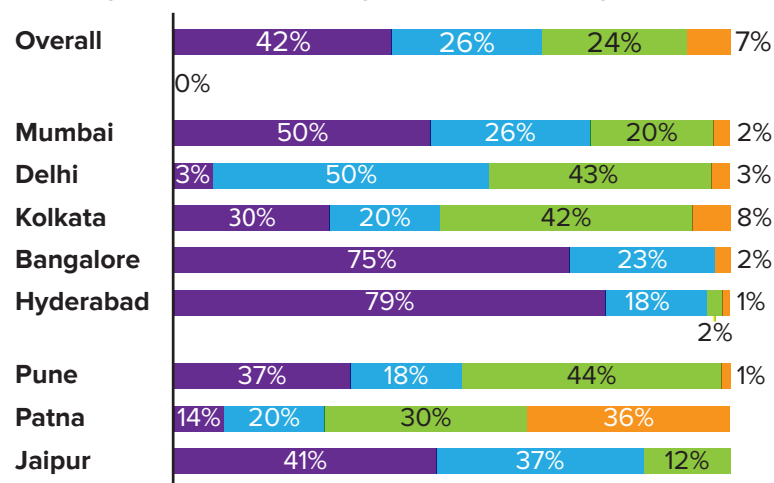
Pro Kabaddi League viewing companionship

- Alone
- With my family
- With my friends
- With my colleagues

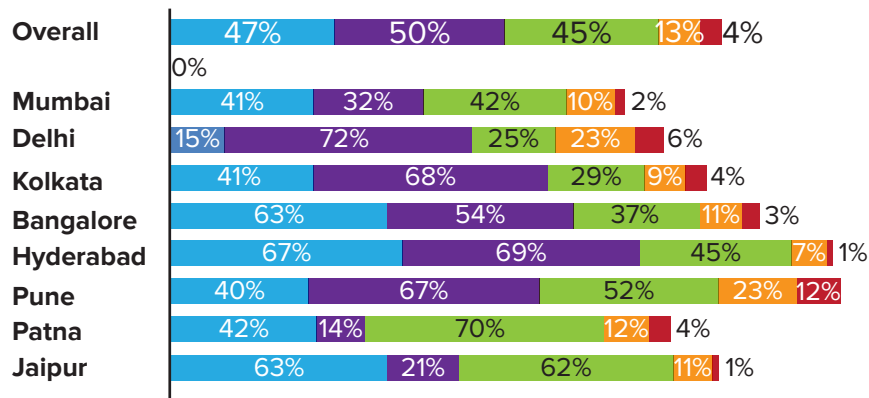


When do viewers tune in to watch Pro Kabaddi League

- Pre show
- During national anthem
- During first half
- During last 10 mins of the game



- When my favourite team is playing
- Which teams are playing
- When my city's team is playing
- Am I seeing any familiar faces
- Celebrity quotient



Where do consumers look for information on Pro Kabaddi League

Sources of Information

		Television	Newspaper	Mobile	Social Media	Radio
CITIES	Mumbai	100%	28%	16%	9%	2%
	Delhi	99%	59%	1%	4%	0%
	Jaipur	98%	39%	7%	8%	2%
	Patna	99%	22%	6%	5%	4%
	Pune	100%	52%	1%	0%	0%
	Hyderabad	100%	96%	1%	16%	2%
	Bangalore	100%	98%	5%	8%	3%
	Kolkata	100%	97%	0%	0%	24%

CRICKET SHIFTS UP TWO GEARS, KABADDI ALSO ON FAST LANE

IN INDIA, WHEN CRICKET DOES the heavy lifting, the numbers will but naturally be spectacular. Team Sponsorship rose a superb 25.33% in 2016, from ₹ 558.2 crore/\$ 86 million to ₹ 699.6 crore/\$ 103 million; the increases riding on a 25.85% upsurge provided by India's national passion.



There are those who argue that the oft-intoned national passion litany is more cliché than fact. Without Team India in action interest plummets, they point out. Leaving that argument for another space, but staying with Team India, the Boys in Blue played 44 international games in 2016 as against 29 matches in 2015 – that is 51% more games.

Of these 44 matches, 34 games were in bilateral series, 5 were ICC matches, and 5 were Asia Cup contests. Translated into money terms – Team Sponsor Star India pays the Board of Control for Cricket in India (BCCI) ₹ 1.92 crore/\$ 0.28 million per match played during bilateral series/Asia Cup and ₹ 0.61 crore/\$ 0.09 million per match for ICC tournaments.

The math therefore works out as ₹ 74.88 crore/\$ 11.01 million for 34 bilateral & 5 Asia Cup matches, ₹ 0.61 crore/\$ 0.09 million for 5 ICC match-ups totting up to ₹ 3.05 crore/\$ 0.45 million in 2016, as against ₹ 44.16 crore/\$ 6.49 million and ₹ 3.66 crore/\$ 0.54 million totaling ₹ 47.82 crore/\$ 7.03 million the previous year.

Additionally, Nike pays around ₹ 60.0 crore/\$ 8.82 million a year to the BCCI to sponsor the Indian cricket team's official kit.

Coming to India's money league, IPL Team sponsorship grew by 9.5%, riding on the back of 22 new brands that tested the waters with IPL franchises during the season.

What is also new and bodes well going forward is that Franchises have started monetizing their digital and social assets. Digital is also becoming an integral part of the sponsorship offering now.

Intrinsically linked to the deepening role of digital in engaging fans is the rise in demand for behind-the-scenes content in relation to IPL teams, opening up avenues for greater monetization in future.

And while many new brands hopped aboard the IPL bandwagon, one category that stood out were the smartphone players, which were fighting tooth and nail for greater share of voice in the world's premier T20 league. Summing up, Team Sponsorship in Cricket grew 25.85% in 2016, from ₹ 341.2 crore/\$ 52 million to ₹ 429.4 crore/\$ 63 million.

And while the Big Daddy Sport was on the up and up, for Football, it was more about a holding operation.

Overall, Football saw a drop, from ₹ 99.0 crore/\$ 15 million in 2015 to ₹ 98.2 crore/\$ 14 million in 2016.

Concomitantly, ISL franchises also saw a decline – to ₹ 37.2 crore/\$ 5.47 million as against ₹ 38.0 crore/\$ 5.85 million in the

year ago period. Reason being the number of sponsors have gone down marginally.

Staying with Soccer, and as was the case in 2015, the tale was also about Indian brands leveraging European Football, English Premier League in particular, to make global statements.

Three-year deals announced in September 2015 by global IT services providers HCL Technologies and Wipro with Manchester United and Chelsea respectively, carried forward into 2016. As too did Apollo Tyres - its association with the Red Devils that has continued since 2013.

The three combined added ₹ 36.0 crore/\$ 5.29 million to Soccer's Team Sponsorship kitty.

Football apart, Other Sports did exceedingly well – Kabaddi in particular leading the charge, with its two-season swing.

From ₹ 118.0 crore/\$ 18.15 million in 2015 to ₹ 172.0 crore/\$ 25.29 million in 2016 is a 45.76% increase. That it was achieved despite Vijay Amritraj's Champions Tennis League getting scrapped is primarily because the market accepted a two-season PKL with open arms. Averaging ₹ 31.0 crore/\$ 4.56 million per season, ₹ 62.0 crore/\$ 9.12 million is what PKL pulled in as Team Sponsorship in 2016.

The year also saw the return of the Indian Badminton League in its new Premier Badminton League avatar, adding approximately ₹ 8 crore/\$ 1.18 million to the Team Sponsorship pie.

Going by the 2016 performance, the expectation is that PKL, ISL, and Pro Wrestling League will be the key Team Sponsorship drivers behind big elephant IPL in 2017 as well. There will of course be at least one new Sports League, that of Table Tennis, this year. Just how much it – and any others that may make an appearance – will add to the overall pie, will depend on the interest levels it can draw from brands spoilt for choice.





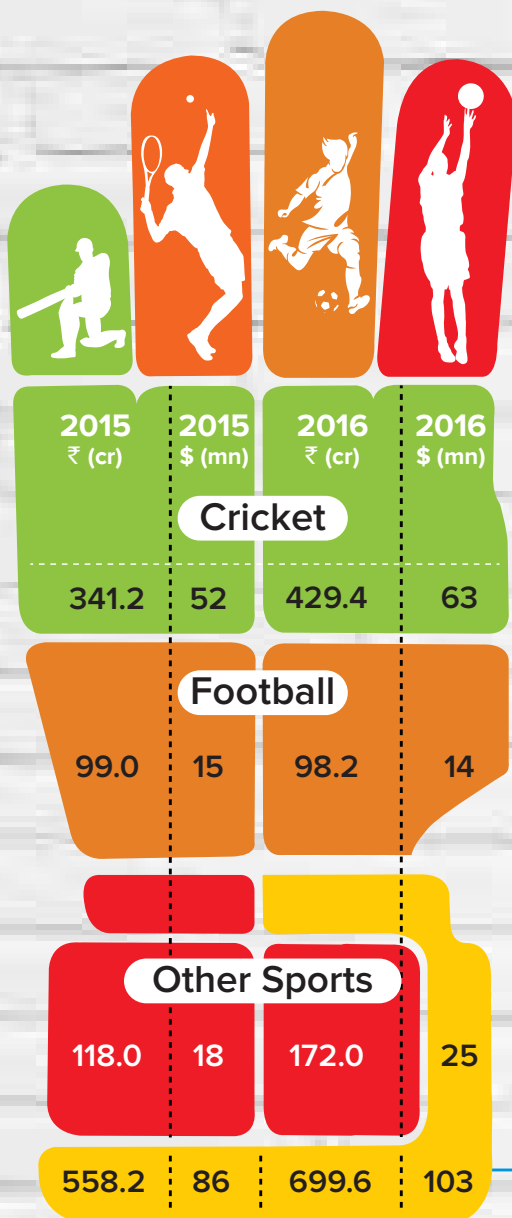
EVEN STEVENS AS FRANCHISES ADD SOME, DROP SOME

THE DEFINING MOMENTS in the growth of the sport industry revolved around the leagues and their franchises. The figures might present a different picture as there was hardly any movement with Franchise Fees rising a meagre 1.24% by ₹ 6.7 crore/ \$ 0.99 million to ₹ 548.0 crore/\$ 81 million in 2016. This would suggest a status quo in activity with all leagues and franchises continuing to go through the calendar in a scheduled manner. Not at all providing an inkling of the amount of “going in, coming out” that the year witnessed.

The addition of two leagues (Premier Badminton League and Tamil Nadu Premier League) and two IPL franchises (Rising Pune Supergiants and Gujarat Lions), two editions of the Pro Kabaddi League (PKL), the deletion of Champions Tennis League, a watered-down version of the IPTL, postponement to 2017 of the Pro Wrestling League and more happened, but it did not really move the needle in any significant manner in regards to Franchise Fees.

On the Cricket front, there has been a marginal de-growth of 0.97% from ₹ 340.1 crore/\$ 52 million in 2015 to ₹ 336.8 crore/\$ 50 million in 2016.

In the year, what is noteworthy is that the BCCI waived off the franchise fee commitments of the suspended CSK and RR till their return to the IPL in 2018. CSK and RR’s “temporary”



Cricket

Football

Other Sports

Total

Team Sponsorship

- Team Sponsorship has grown by 25.33% - India Cricket has been the biggest contributor with 51% more matches played in 2016 vs. 2015
- IPL Team sponsorship grew by 9.5% - 22 new brands tested ground with the IPL teams
- Team sponsorship in other sports has kept pace with the category despite WKL & CTL shutting shop
- Franchise fee pie has remained constant despite additions (TNPL, PBL & 2 teams in IPL) and deletions (WKL, CTL, CSK & RR)

Source – ESP Properties

2015 Conversion Rate 1\$ = ₹ 65

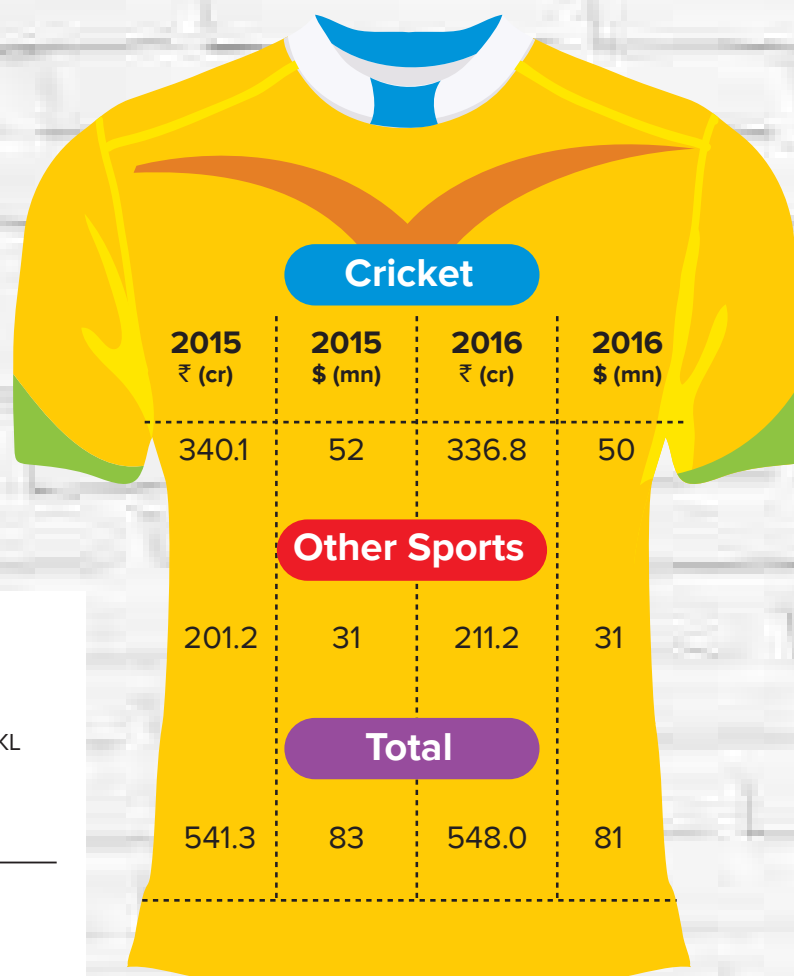
2016 Conversion Rate 1\$ = ₹ 68

replacements RPSG and GL paid ₹ 16.0 crore/\$ 2.35 million and ₹ 10.0 crore/\$ 1.47 million respectively to the BCCI. But they also forfeited a hefty paycheck payable to each franchises from the central pool. As for the TNPL, its 8 franchises collectively paid the N Srinivasan controlled Tamil Nadu Cricket Association around ₹ 33.0 crore/\$ 4.85 million.

In Other Sports, the franchise contribution has shown a growth of 4.97% from ₹ 201.2 crore/\$ 31 million to ₹ 211.2 crore/\$ 31 million. This includes an additional ₹ 18.0 crore – ₹ 20.0 crore/\$ 2.65 million - \$ 2.94 million from another edition of the PKL in 2017 itself. Though Other Sports lost out from the pushing forward of the PWL and fewer franchises in IPTL, the return of PBL to the arena saw its 6 franchises collectively pay nearly ₹ 20.0 crore/\$ 2.94 million to league owner Badminton Association of India and commercial rights holder Sportzlive.

A more stable calendar is expected in 2017, where the addition of a table tennis league, a powerboating team-based race, expansion of the Futsal property, and growth of other regional leagues should add to the overall total. A real boost, however, will ride on the future of the two tennis leagues. While the CTL and IPTL will be hoping for a comeback, all facts and logic point, unfortunately, to a quiet demise. But even without these two properties, the fact that most others have settled into a working model augurs well for leagues and their promoters.

Franchise



Cricket





Other Sports

Total



IPL

Source – GroupM

FRANCHISES	 2016	 2016	 2016	 2016
Royal Challengers Bangalore	5,10,431	1,00,82,680	16,90,000	90,36,837
Mumbai Indians	2,98,315	1,84,71,840	18,50,000	1,07,06,319
Kolkata Knight Riders	3,11,187	19,81,780	21,10,000	1,46,30,997
Delhi Daredevils	1,28,005	41,72,220	7,47,000	36,88,261
Sunrisers Hyderabad	4,32,004	69,17,960	9,16,000	46,53,129
Kings XI Punjab	1,12,841	10,99,660	9,72,000	76,69,319
Rising Pune Supergiants	1,99,587	20,52,420	83,300	15,55,073
Gujarat Lions	1,98,373	28,21,510	80,400	10,20,690





- Although Gujarat Lions topped the league table in IPL 2016, the team ranked at a lowly #6 when it came to social chatter
- Mumbai Indians & Kolkata Knight Riders are the ONLY two sports franchises in India to have crossed the 10 million mark when it comes to Facebook followers
- Mumbai Indians contributed 39% of the total search volumes amongst IPL teams in 2016





ISL

Source – Group M

FRANCHISES	 2016	 2016	 2016	 2016
Kerala Blasters	1,17,460	1,42,780	3,64,000	9,09,454
FC Goa	1,58,638	4,37,170	2,41,000	4,33,325
Atletico de Kolkata	77,576	3,67,780	2,52,000	10,41,308
Chennaiyin FC	62,010	3,16,660	1,56,000	4,21,056
Delhi Dynamos	72,643	1,92,390	79,400	6,50,186
Mumbai City FC	61,298	1,53,720	89,100	5,76,742
FC Pune City	55,588	92,680	94,900	9,00,201
North East United FC	35,068	50,750	1,30,000	2,89,614





- Atletico de Kolkata is the ONLY ISL franchise to have crossed the 1 million mark on Facebook
- Kerala Blasters FC with 25% of the pie of cumulative Twitter followers of ISL teams, generated 2nd highest social conversations, however was low when it came to search volumes (#6 amongst the 8 franchises)
- FC Goa was the undisputed Champion when it comes to social conversations and search volumes amongst all ISL franchises





PKL

Source – GroupM





FRANCHISES	 2016	 2016	 2016	 2016
Jaipur Pink Panthers	65,151	62,580	5,25,000	5,63,152
U Mumba	60,036	1,51,450	5,17,000	5,71,065
Patna Pirates	63,977	2,84,490	3,04,000	2,71,198
Puneri Paltan	37,608	1,28,990	3,57,000	6,01,119
Bengal Warriors	38,846	75,940	2,56,000	3,64,869
Dabang Delhi	29,543	44,170	2,53,000	5,88,102
Telugu Titans	28,962	3,11,440	2,18,000	4,19,962
Bengaluru Bulls	25,588	1,72,790	2,89,000	3,50,593

- While Pro Kabaddi edges past Indian Super League when it comes to TV Reach, on Social Conversation scale average conversation per PKL team (43,714 conversations/team) is approx. half of that of an ISL team (80,035 conversations/team)
- While Telugu Titans finished 4th in the league, their search volumes were a quarter of the total pie across 8 teams
- Jaipur Pink Panthers generated more social conversation than Bengaluru Bulls and Puneri Paltans put together



HIL

Source – GroupM

FRANCHISES	 2016	 2016	 2016	 2016
Delhi Waveriders	15,694	3,570	2,604	91,588
Kalinga Lancers	13,799	5,680	1,563	46,060
Dabang Mumbai	13,510	2,190	18,100	98,953
Ranchi Rays	12,647	260	229	3,455
Jaypee Punjab Warriors	7,293	140	1,233	25,015
Uttar Pradesh Wizards	5,302	50	708	1,488





- When it comes to twitter followers, Dabang Mumbai is towering above the rest of the HIL franchises. Dabang Mumbai has 3 times the cumulative sum of followers of the rest of the 5 franchises
- On the Facebook front, Kalinga Lancers, Jaypee Punjab Warriors, Uttar Pradesh Wizards & Ranchi Rays together amount to less than half of the Facebook followers for Dabang Mumbai and Delhi Waveriders



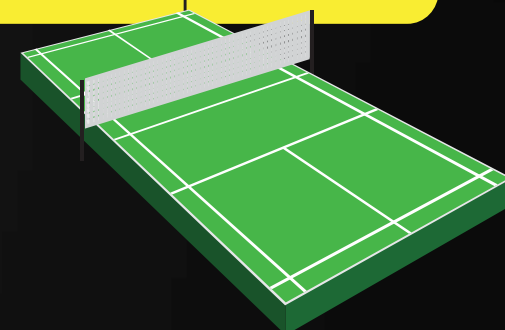


IPTL



FRANCHISES	 2016	 2016	 2016	 2016
Indian Aces	6,204	1,240	15,300	1,37,095
Japan Warriors	3,595	540	2,864	2,784
Singapore Slammers	2,785	330	8,108	22,449
UAE Royals	2,855	500	5,877	22,378

Source – GroupM




ainment at its best!

Entertainment at its



PBL

Source – GroupM

FRANCHISES	 2016	 2016	 2016	 2016
Chennai Smashers	7,528	7,280	2,203	1,522
Delhi Acers	7,064	170	428	17,651
Mumbai Rockets	3,648	920	332	1,189
Hyderabad Hunters	2,256	3,690	902	7,703
Awadhe Warriors	-	2,910	59	4,850
Bengaluru Blasters	-	-	207	542



THE NATURE OF IN-GAME AUDIENCES AT INDIAN PROFESSIONAL SPORTS LEAGUES: A MOBILE GEO-LOCATION STUDY



Anindya Datta
Chairman and CEO,
Mobilewalla



Varun Chugh
Head of Product,
Mobilewalla

India, currently, has 6 major sports leagues: the Indian Premier League (IPL), the Indian Super League (ISL), Hockey India League (HIL), Premier Badminton League (PBL), Pro Kabaddi League (PKL), International Premier Tennis League (IPTL). While we studied the attendees at, and the overlaps thereof, across all of these, in this article we only report data on IPL and ISL, given the substantial attendance superiority at these two, and the brevity requirements of this article.

THE ANALYSIS

Unsurprisingly, the overall gender breakdown for the two leagues follow expectations:

Male	League	Female
88%	IPL	12%
91%	ISL	9%

The 33% higher female attendance at IPL explained by the sporting ethos of India – cricket is undoubtedly a more integral part of the national fabric than football. When broken down by location, the numbers are largely similar, with the exception of New Delhi, which has a substantially larger number of males (94%) attending IPL games than the national average.

	Males	
City	IPL	ISL
Delhi	94%	89%
Kolkata	89%	87%
Mumbai	88%	88%
Pune	88%	89%



Notwithstanding the gender similarities of the two leagues, the age characteristics are rather different. It turns out that ISL audiences are substantially younger than IPL audiences – while about 60% of IPL audience is 25 or above, only 45% of ISL audiences fall in that range. In particular, in the highly impressionable 13-18 age range, ISL outnumbers IPL by about 70%.

Age Groups	ISL	IPL
13-18	29%	17%
19-24	26%	24%
25-34	26%	36%
35-49	14%	19%
50+	6%	3%

Concordant with the younger demographic, ISL includes a significantly higher percentage of students in its audience (42%) than IPL (31%), a consumer category of considerable interest to brands and advertisers.

Education	ISL	IPL
High School Students	22%	14%
College Students	20%	17%

Demographics aside, we observed other characteristics that reveal key similarities and differences between the two leagues. For instance, over 80% of attendees at both leagues carry smartphones. Not surprising, given the urban nature of the venues and that the majority of attendees in both are millennials. Also, as expected, a majority of attendees at both leagues carry Android devices, mirroring the usage pattern of the Indian consumer. But the similarities end there.

About 5 times as many attendees at ISL games carry iPhones than IPL attendees. Also, the Android devices used by ISL audience appear to be higher-end (pricewise) than those used at IPL games:

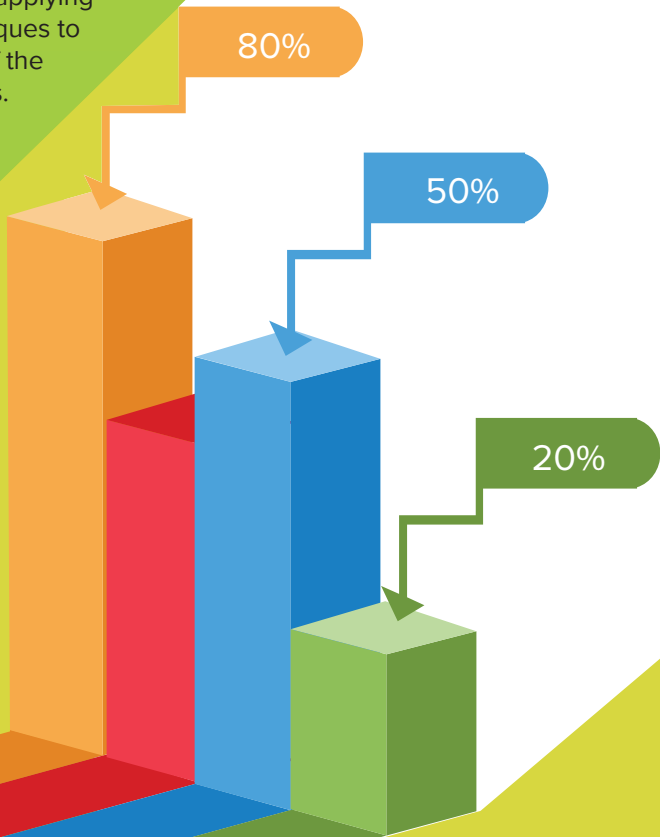
ISL	IPL
Galaxy Core	Redmi 2
Galaxy Win	Moto G (2nd Gen)
Galaxy J7	Galaxy Neo

Taken together, this appears to provide strong evidence that, on average, ISL attracts a higher income, and higher spending audience than IPL. This was a significant finding as this is contradictory to conventional wisdom. We also found it interesting that the cellular carrier used by the two audiences were also different. Given that the cities hosting games were not exactly the same, we just considered the four cities which had active ISL and IPL teams in 2016 – Delhi, Kolkata, Mumbai and Pune. It turns out that Vodafone is the most-used provider of cellular services to IPL audience members (24%) while Reliance Jio tops the charts for ISL attendees (31%).

Finally, given the many differences chronicled above, we investigated the actual overlap between the audiences – effectively we asked if the same folks showed up at cricket and soccer games. We found the overlap is very low – only 0.1% of the audiences of the two leagues are in common. While surprising on the surface, this is in concordance with the many differences described above. It is also interesting that Mumbai had about 3 times as many people who watch both games than Kolkata, Delhi and Pune.

METHODOLOGY

We conducted this study by capturing the mobile devices that showed up during IPL and ISL games at the various stadiums and applying our proprietary techniques to decipher the profile of the users of these devices.





VIRAT IN A LEAGUE OF HIS OWN; SINDHU CASHES IN

IT WAS AN OLYMPIC YEAR, from which India came away with little to show for its efforts. Competing in 15 disciplines at Rio 2016 with their biggest-ever contingent numbering 118, India had hoped to go past their best ever tally of six medals in London. That was not to be, but Pusarla Venkata Sindhu, with a Silver in Badminton and Sakshi Malik, who grappled to bronze in Wrestling, returned home to national adulation. Not surprising then, that brands also came calling.

Both contributed to Non-Cricket endorsements growing by 83.5% in 2016, from ₹ 42.0 crore/\$ 6.46 million to ₹ 77.1 crore/\$ 11.34 million.

And if Cricket endorsement has grown by 5.6%, in a year when the two long-standing endorsement titans Sachin Tendulkar and MS Dhoni witnessed drops in their individual brand portfolios, and many of the second and third rung of India's Cricket talent didn't really come up to scratch, it is singularly due to the exploits of Team India captain Virat Kohli. He has had a year for the ages, when everything he touched turned to gold dust, on and off the field.

No surprises then that Kohli had the biggest part to play in Cricket endorsements rising from ₹ 264.4 crore/\$ 40.68 million to ₹ 279.3 crore/\$ 41.07 million in 2016.

As for action on the international field, for the third year running, a global sporting icon was leveraged by an Indian company to push their product. Realty major Kanakia Spaces signed up France's 1998 FIFA World Cup winner Zinedine Zidane as brand ambassador for its Kanakia Paris project in Mumbai's Bandra-Kurla Complex.

The Real Madrid manager's signing is what took International Athletes endorsement from ₹ 110.0 crore/\$ 16.92 million in 2015 to ₹ 120.0 crore/\$ 17.65 million in the year under review.

Of course the French Footballing great's endorsement rate of ₹ 10.0 crore/\$ 1.47 million per year is minor league play compared to the ongoing ₹ 50.0 crore/\$ 7.35 million a year deal signed by Hero MotoCorp with global sporting superstar Tiger Woods in 2014. Or the even bigger two-year deal Tata Motors signed in 2015 with the world's best footballer Lionel Messi as global brand ambassador for a whopping ₹ 60.0 crore/\$ 8.82 million per year.

Returning to the Cricket pitch, and Virat Kohli. If in 2015 the aggressive Team India skipper had stepped into the exclusive ₹ 100.0 crore/\$ 14.71 million brand endorsement deal club that Dhoni and Tendulkar belonged to, in 2016 he went hurtling past them.

Virat ended 2016 with 20 brands under his belt with a collective endorsement value of ₹ 120.0 crore/\$ 17.65 million, which incidentally, is more than what the other two members of the ₹ 100.0 crore/\$ 14.71 million club together pulled in.

Dhoni, who had 15 brands in 2015, was down to 12 in 2016, with an endorsement value totaling ₹ 65.0 crore/\$ 9.56 million. As for Sachin, he had 12 brands in 2015, which had dropped to 8 in 2016 that, all told, was worth ₹ 45.0 crore/\$ 6.62 million. One aspect that is difficult to quantify in the case of the original

Master Blaster however, is how much he is pulling in from appearances, which he did a lot of in 2016.

As for erstwhile big names like Yuvraj Singh, Virendra Sehwag, Gautam Gambhir, Harbhajan Singh and Zaheer Khan, barring Gambhir, who is still an active player, the others are looking to invest the money they have earned during the course of their respective careers in various ways.

As for the current lot of cricketers, there is only one who seems to be a serious contender to fill the space vacated by the likes of off spinner Harbhajan. He is India's bowling spearhead and fellow offie Ravichandran Ashwin. The all-rounder's exploits on the field and in the branding arena should be worth watching during the course of 2017.

Move off Cricket and to 2015's Big 3 of Badminton queen Saina Nehwal, Tennis ace Sania Mirza and Boxing legend Mary Kom (in that order), interject PV Sindhu in second position.

Riding the wave of her Rio Games success, the Hyderabad-based shuttler signed a three-year deal in September with sports management company Baseline. Reported to be worth up to ₹ 50.0 crore/\$ 7.35 million after factoring in performance bonuses, it is the highest ever for any non-Cricket player.

By 2016-end Sindhu had signed 6 brands with a cumulative

endorsement value of ₹ 7.5 crore/\$ 1.10 million. If one adds the ₹ 13.0 crore/\$ 1.91 million in cash awards handed out to Sindhu in the spree of felicitations by Central, state and private bodies in the wake of her Rio heroics, that takes her well past Saina though.



Despite injuries putting paid to her Rio ambitions, and some fair-weather media reporting that followed, the Haryanvi former world No.1 held her price line on endorsement rates as well as the 12 odd brands that were on board in 2015, earning approximately ₹ 15.0 crore/\$ 2.21 million.

Hold the price line is what Sania failed to do in 2016, or the number of brands in her portfolio. If February saw the fairy tale WTA win streak that the Hyderabad and Swiss partner Martina Hingis had going end at an incredible 41, the year also saw the break-up of the SanTina partnership for “strictly professional reasons” (read poor results).

The on-court downturn reflected off-court as well, with the number of endorsements going down from 6 to 4, as too the per deal value from ₹ 0.6-0.8 crore/\$ 0.09-0.12 million in 2015 to ₹ 0.5-0.6 crore/\$ 0.07-0.09 million in 2016. Her appearances on behalf of brands in Dubai continued though, just about keeping her in front of Mary Kom.

The Manipuri all-time great had 13 brands in her kitty in 2016, down from 15 brands in 2015. With the drop in brand count came a steep fall in overall earnings for Magnificent Mary, whose earnings fell to ₹ 2.5 crore/\$ 0.37 million in 2016, way down from the ₹ 7.5 crore/\$ 1.15 million she managed in the previous year.

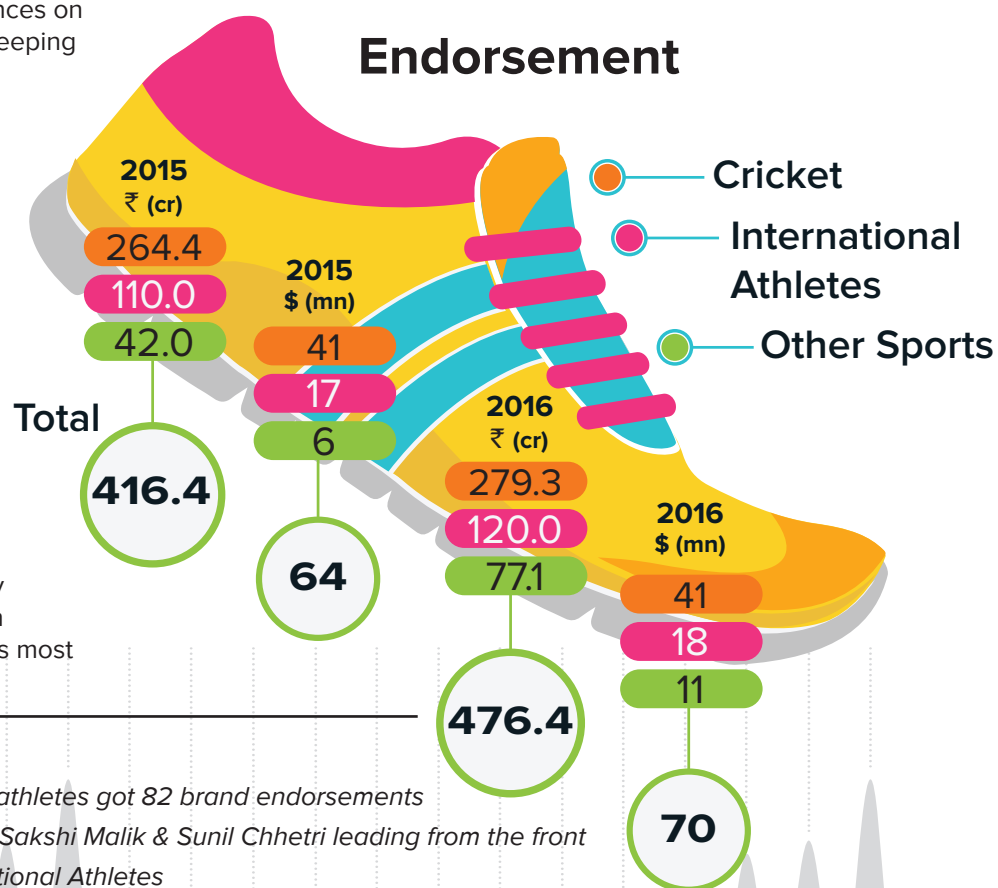
Coming to Sakshi Malik, the grappler from the interiors of Haryana signed 2 brands after Rio. But it was the windfall of cash rewards and incentives, amounting to at least ₹ 3.5 crore/\$ 0.51 million, that most swelled the Bronze medalist's coffers. And of course the many appearances on behalf of brands she made.

It was not just about women in the Other Sports category though. Vijender Singh's Olympic Bronze may have been achieved way back in 2008 at Beijing, but Indian boxing's most

celebrated male pugilist has been making waves since turning professional and has 3 brands - Ambrane, Maruti & 1 Suiting's - in his portfolio that give him ₹ 1.0-1.2 crore/\$ 0.15 - 0.18 million, all told. The man from Haryana's boxing nursery of Bhiwani, like state mate Sakshi, also does a lot of appearances.

An “honorable mention” must also be made of Team India football captain Sunil Chhetri. The man who holds the all-time goal record in Indian league football entered into the brand endorsement by signing with Volini in 2016.

Summing up, all three components of Cricket, International Athletes and Other Sports together drove up Endorsements by 14.4% upside, from ₹ 416.4 crore/\$ 64.0 million to ₹ 476.4 crore/\$ 70 million in 2016.



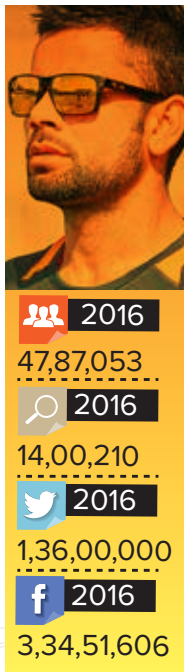
- Endorsement has grown by 14.4%
- Cricketers got total of 74 brands whereas non-cricket athletes got 82 brand endorsements
- Non-cricket endorsement grew by 83.5% - PV Sindhu, Sakshi Malik & Sunil Chhetri leading from the front
- Indian brands continued their association with International Athletes
 - Hero continued its association with Tiger Woods
 - Tata Motors with Lionel Messi
 - Kanakia Spaces signed up with Zinedine Zidane

Source – ESP Properties

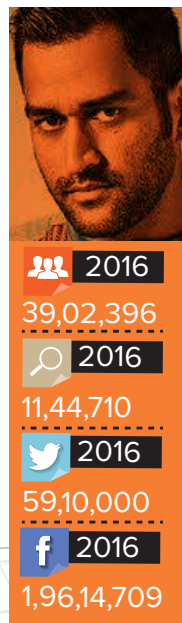
2016 Conversion Rate 1\$ = ₹ 68 | 2015 Conversion Rate 1\$ = ₹ 65

Top 10 Athletes

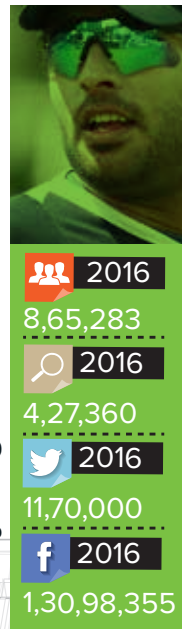
Virat Kohli



M S Dhoni



Yuvraj Singh



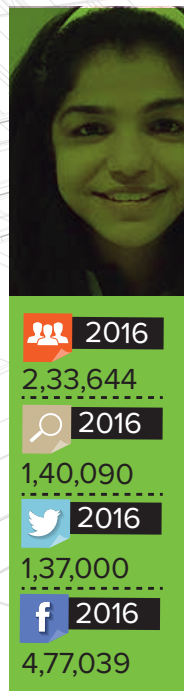
Sachin Tendulkar



P V Sindhu



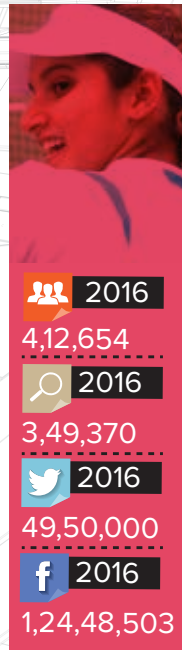
Sakshi Malik



Dipa Karmakar



Sania Mirza



Ravichandran Ashwin



Rohit Sharma



- Virat Kohli's batting form & leadership prowess has catapulted him to the Numero Uno spot when it comes to digital numbers
- Sachin Tendulkar's retirement hasn't affected his fan following on Twitter
- In non-cricket sports, while Sania Mirza takes the cake when it comes to Twitter & Facebook followers, PV Sindhu has been the flavour of the season when it comes to social conversations & search volumes

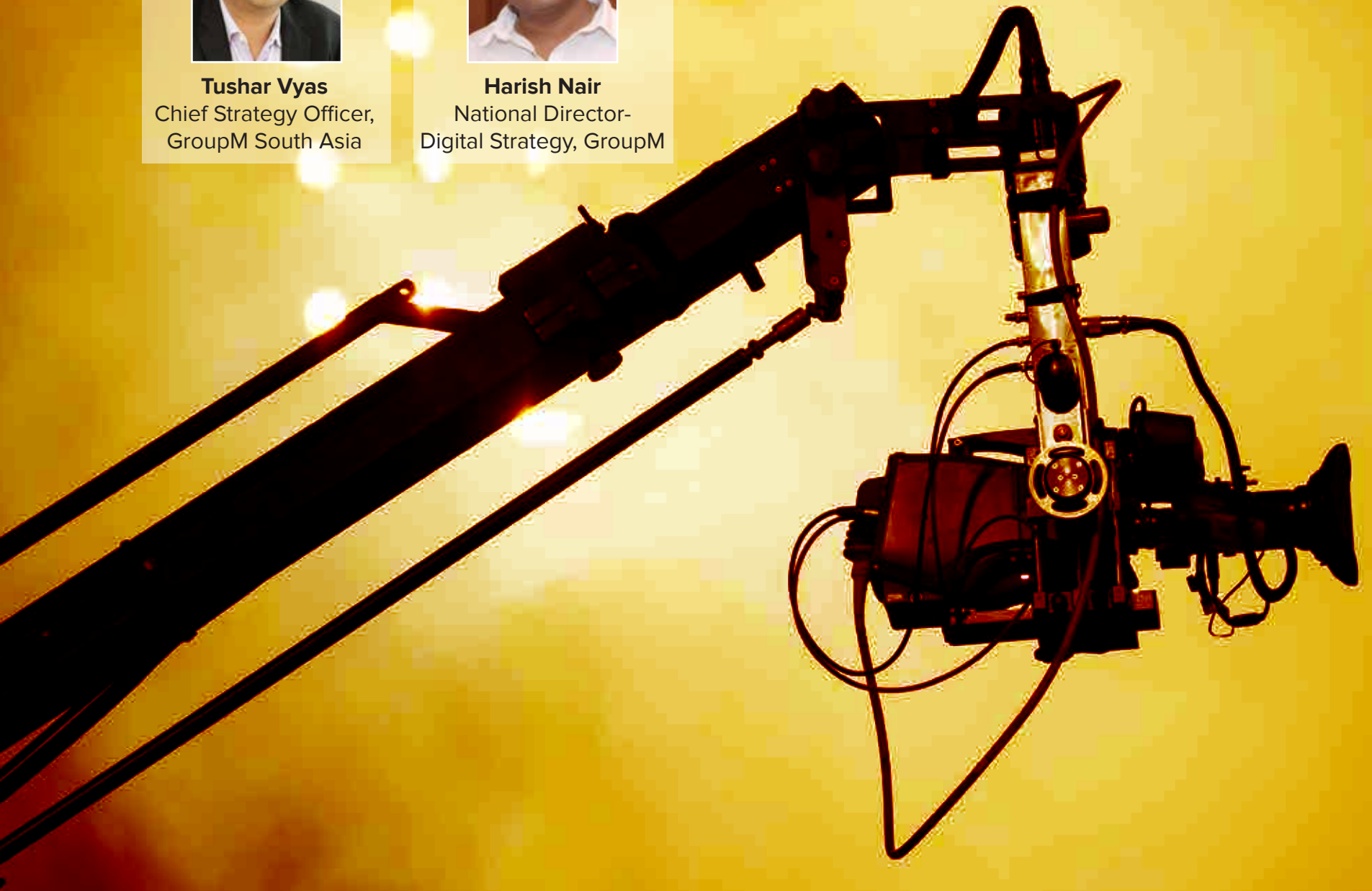
FUTURE OF SPORTS BROADCAST IS BROADCAST!



Tushar Vyas
Chief Strategy Officer,
GroupM South Asia



Harish Nair
National Director-
Digital Strategy, GroupM



What will change in Sports Broadcasting?

Just 2 things. Sports and Broadcasting.

Sports itself is being redefined by GenZ. There is now a long tail of unique niches which though not comparable to a mass scale sport (like football or cricket) yet, still has deep presence in pockets. Gaming, especially AR/VR enabled, new leagues like poker are just small beginnings. Pokemon Go was just a small start. Bigger things are on the anvil which will redefine community activated gaming and maybe even sports itself. And will present more difficult choices for our young viewers - in the limited free time available, do they watch a live feed of their friend hunting pokemons in Bandra or do they watch Australia sledge England at the Ashes? Please note that, while we instinctively choose the latter option, Gen Z will just as effortlessly choose the former.

Broadcasting will change for the better with a richer user experience and enhanced distribution thanks to Digital.

- Digital is already strong and growing on Niche sports or Tier 2/3 matches of popular sports appealing to specific audiences. Popularity of platforms like Twitch for watching gameplays of others is testimony to this. But more than that, Digital platforms also help reach TV light users - an increasingly on-the-move audience for whom the mobile has become the primary screen. Recently Hotstar and Akamai Technologies announced new online viewership records on its platform for live sporting events during the India-England series. More than 25 million users watched the 2nd India Vs England ODI on the platform, accounting for a majority of the Internet traffic from India on that day. The viewership peaked at more than 3 million concurrent viewers on the platform during the final T20 match of the same series, establishing a new high in the Asia Pacific region.
- Not just in India, this seems to be a trend that is accelerating globally. Live Sports fans have been the strongest hold outs against cutting TV cable even in strong digital markets like US. But deals like Twitter-NFL which offer live streaming feed seem to help accelerate the shift to digital for them, even as Millennials already prefer to watch from a mobile screen. Social platforms have already added an interactivity layer and conversation to sports as never before. FB/Twitter have become the place for analysis away from TV. It would be interesting to see impact of Live Sports feed, Fan Engagement and data getting activated on same platform.

- If Mohammed from Egypt can't go to the Stadium then.... take Mohammed virtually to that stadium. This is what Google+ did for Manchester United's fans who were outside UK and had no chance to visit Old Trafford stadium to cheer for their favourite team.
- Vodafone India went the diagonally opposite way and launched a 360-degree 'Fan Photo' initiative that captured the live stadium scenes from the IPL matches, and allowed fans to tag themselves and their friends. If you were lucky enough to be at the stadium, you could flaunt it and let the world know. And thousands did. Showing that brands can play a key role to trigger such experiences.
- Gadgets like FanVision, a dedicated controller help enhance a fan's experience at live sporting events like NASCAR. Fans get to listen in on live team communications, watch in-car camera feeds and check continuously updating leader boards. Imagine the same for IPL at scale.
- Take a step further with technology and you might even experience Virat Kohli swearing at you face to face. American pro sports league now broadcasts live games in virtual reality. Watching pro sports in VR could be the next big thing in broadcast evolution digitally placing fans in the best seats in the house at the game.

And the experience will get even more immersive with each passing day

And what will not change

The core of sports broadcasting is "Live". "Live" action is platform agnostic. It will move to a new platform or rather move to multiple platforms existing now, or even those that will evolve and become center-stage in future. However, it will remain central in the broadcast format.

The future of sports broadcast will always be live broadcast. Digital and data will make live sport viewing easier, with wider availability and a much richer user experience. This will aid to bring in the next generation of fans who are united by their passion for sports.

CRICKET LEADS CHARGE AS MEDIA SPENDING HITS HIGH NOTES

IF 2016 WAS A 'Happywala' year of growth in Sports Sponsorship, there was definitely a 'Cricketwala' skew when it came to Media Spends.



The numbers speak for themselves. If Media spends grew by a more than impressive 24.63% overall, when separately looked at between On Air, Print and Digital, growth has been the highest on Television, followed by Digital and bringing up the rear is Print. That this applied both percentage-wise as well as in absolute terms is noteworthy and indicative that in the near future, Digital will overtake Print vis-à-vis Media Spending on Sports.

Breaking it down, On Air spending in Sport grew an incredible 34.74%, from ₹ 1756.9 crore/\$ 270 million to ₹ 2367.2 crore/\$ 348 million; Print 4%, from ₹ 840.0 crore/\$ 129 million to ₹ 873.6 crore/\$ 128 million; and Digital 22.73%, from ₹ 220.0 crore/\$ 34 million to ₹ 270.0 crore/\$ 40 million.

Cricket was of course the biggest driver. And within Cricket, it was the Indian Premier League. As noted earlier, the IPL drew

₹ 1020.0 crore+/\$ 150 million+ net in ad sales revenues for Sony Pictures Network India, a good 25%+ over 2015's numbers.

Another key development in 2016, which will increasingly become the norm going forward, was that SPN introduced separate IPL inventory sales for Standard Definition (SD) and High Definition (HD) channels.

For IPL 2017, SPN is reportedly quoting spot rates at over ₹ 600,000 for its SD channels while for the HD feed it is ₹ 200,000 a spot.

On the television eyeballs front, IPL's 2016 season garnered 361 million viewers, as per data provided by BARC. Pertinently, the viewership was not male-dominated, with women (41%, including rural) and kids comprising a significant portion of the TV audience pie. Riding high on sustained interest in IPL from

categories like Telecom, Auto and Ecommerce, Sony had 80+ brands associated with world cricket’s biggest annual property.

Within Cricket, and excluding IPL, the number of Team India play days was 111. So the total India Cricket days being higher in 2016 vs. 2015 also contributing majorly to Media spends growth.

It was also a year when India hosted multiple events of international stature – the ICC World Twenty20, the Kabaddi World Cup, and the Junior Hockey World Cup. Host broadcaster Star Sports was able to pull in ₹ 260.0 crore/\$ 38.24 million net On Air ad sales revenues for the sixth edition of ICC’s blue riband T20 event.

Innovations introduced for World Cup 2015, which saw the first global telecast of cricket in 4K and drone cameras above the stadiums, and Star giving feeds in regional languages, were carried forward into the 2016 World T20, which incidentally was the first major ICC event produced by ICC TV.

If Cricket was riding high, non-Cricket Sports, too, showed healthy growth. Longer live content duration with Pro Kabaddi League, Indian Super League, Hockey India League, Premier Badminton League, etc. helped push up Media spending.

However, interest for non-Cricket Sports properties is resting only within a few categories and among a few advertisers. Wider reach and consistent performance metrics of these non-Cricket league properties in subsequent years can help in garnering more spends in future.

Speaking of innovations, one mega event where official broadcaster Star Sports pulled all the stops in bringing the game alive was the Rio 2016 Olympic Games. While it admittedly “did not show Star the money”, the network provided an unprecedented wraparound experience for the 191 million viewers who tuned in to watch the games during the course of the mega event.

While Star India simulcast the games on all eight Star Sports channels (four in SD and four in HD), the network’s OTT platform Hotstar simultaneously made available 14 live feeds and 36 concurrent feeds from Rio on its Olympics video player, with over 3000 hours of live coverage.

On a concluding note, 2016 was witness to a massive consolidation in the sports broadcast arena in India with the decision of the Subhash Chandra controlled Zee Group to exit the scene and sell off the TEN Sports Network lock, stock and barrel to SPN for \$ 385 million.

As part of the sale terms, Zee agreed to a non-compete clause for four years. Zee had bought Ten Sports from Dubai-based

Abdul Rahman Bukhatir’s Taj Group in 2006. Zee operates the Sports Broadcasting Business under Taj TV Ltd, Mauritius, which has been distributing the TEN brand in India.

Explaining the rationale behind the buyout, SPN India CEO NP Singh had said, “The acquisition will strengthen SPN’s offering for viewers of cricket, football and fight sports, complementing our existing portfolio of international and domestic properties.”

It was all very neat. Too neat as it finally panned out. Zee, like Disney had done when News Corp bought out ESPN’s stake in the ESPN Star Sports joint ventures in mid-2012, was exiting the sports broadcast arena, turning the existing tripoly (no disrespect to the Harish Thawani controlled Neo Sports Broadcast), into a duopoly for all intents and purposes.

It was not to be though. Before SPN’s acquisition of TEN Sports could be completed (as this report went into print, the final pieces of the deal closure were being put in place), came the announcement on 06 February 2017 that Discovery, SPN’s erstwhile channel distribution partner in this market, was launching DSPORT.

What it means now is that a little short of five years after SPN (then Multi Screen Media), launched Sony SIX, there is a new player in the space with aggressive intent. And India is back to being a sportscaster tripoly market.

MEDIA SPENDS				
Component	2015 ₹ (cr)	2015 \$ (mn)	2016 ₹ (cr)	2016 \$ (mn)
TV	1756.9	270	2367.2	348
Print	840.0	129	873.6	128
Digital	220.0	34	270.0	40
Total	2816.9	433	3510.8	516

Source – GroupM CTG
2015 Conversion Rate 1\$ = ₹ 65 | 2016 Conversion Rate 1\$ = ₹ 68

- Media Spends grew by 24.63%
 - Significantly higher number of India cricket days in 2016 as against 2015
 - 2016 saw separate SD & HD inventory sale for IPL
 - Longer LIVE content duration with PKL, ISL, HIL, PBL etc

DIGITAL IS POSSIBLY STARTING THE NEXT CYCLE FOR THE GROWTH OF SPORT



NITIN KUKREJA
CEO, STAR Sports

CALL me an eternal optimist but I do believe that Indian sport is on the verge of something special. Even as the front-page narrative and the usual discourse on Indian sport continues to be dominated by matters of governance at our sports federations, our less than expected medal tally at Rio, our lack of infrastructure or grassroots programs, there is much going on in India to be proud and hopeful about.

1983 galvanized the nation towards cricket and the World Cup winning team achieved demi-god status overnight. As these icons continued their conquests of foreign lands through the next few years, there was a parallel phenomenon of television making an appearance into Indian households. Week after week, television was able to showcase the story of these icons, up close and in color! Visuals of Kapil Dev holding aloft the Prudential World Cup, and the Indian team doing a victory lap on Ravi Shastri's recently "acquired" Audi after winning the 1985 Benson & Hedges World Championship of Cricket remain etched in many Indian minds even today.

And in its own way, 2016 should be remembered as a year that propelled Indian sport even further than what 1983 did! What was so special about 2016?

For one, if international achievement is the yardstick, a lot many more heroes and heroines emerged. The Indian cricket team, which underwent a massive transition over the last few years, is once again the #1 team in the world in Test Matches, and in Virat and Ashwin, we have both a batsman and a bowler who are knocking down world records by the month. Anup Kumar, the captain of the World Cup winning Indian Kabaddi team is already a household name, as is Ajay Thakur, who put in a match winning performance in the final of the Kabaddi World Cup. Vijender Singh carried the torch from his Olympic glory to a professional Asia Pacific boxing title. And almost the entire 2016 Rio Olympics narrative was dominated by the women – P.V. Sindhu and Sakshi Malik brought in precious medals, even as a Dipa Karmakar captured the Indian imagination in a discipline that most Indians had not even heard of! And in a far greater measure than 1983, in 2016, sport went a long, long way in becoming accessible – such a key ingredient in making it part of the culture itself! Both through the various domestic leagues and through international events, Indians across the country had an opportunity like never before, to go to a game and experience sport up close. India hosted multiple events of international stature – the ICC World T20, the Kabaddi World Cup and the junior Hockey World Cup. And the various other domestic leagues gave an opportunity to a family in Ranchi to experience a hockey game, in Kochi to experience a football game, in Visakhapatnam to experience a Kabaddi game and in Lucknow to experience a badminton game – all in front of passionate, partisan crowds, which were typically seen only in international

cricket matches. And alongside, accessibility improved off ground as well. While TV goes from strength to strength and picture quality improves through HD and 4K technologies, platforms like Hotstar have improved the access of sport to being watched anytime, anywhere. And as bandwidth costs decrease, this access will only help fans in never missing a moment of any game! Again, as TV spurred on cricket in a virtuous cycle starting in 1983, digital is possibly starting the next cycle for the growth of sport.

2017 promises to be another exciting year in the journey of Indian sport. The Indian men's cricket team is already hitting new peaks and we are getting ready to host the FIFA Under-17 World Cup. Kabaddi promises to go deeper into India with the addition of more teams. Vijender is getting ready to defend his Asia Pacific title and then hopefully scale newer heights. Many more stars are in the making – from the disappointment of not even qualifying for the 2008 Olympics, the men's hockey team is already up to #6 in the world. Badminton has more Indian men's players in the top 100 than each of the traditional powerhouses like China, Indonesia and Malaysia!

At Star, we have always believed that cricket can get even bigger than what it is but we also equally believe that India is too vast and heterogeneous to be a one-sport country. We stand as proud pioneers and key stakeholders in the journey of Indian sport and wish everyone a great 2017 ahead!

LET THE GOOD TIMES ROLL

CHANGE IS THE ONLY CONSTANT, and we will have a lot of it in 2017, of that we can be certain. The first two months have already provided pointers to what is coming in what promises to be an action packed and disruption awash year for Sportainment.



First off the blocks was sports channel DSPORT, from the Discovery stable.

"We are going to invest millions of dollars in India and by end of 2017, India will be one of the top 3 fastest growing markets for Discovery across the world," said Karan Bajaj, Discovery Networks Asia-Pacific senior vice president and general manager, South Asia, at the channel launch on 06 February.

Make that billions of dollars as Discovery Networks has declared it intends to bid for the IPL rights. Which means that what was earlier a two-horse race between incumbent SPN and Star for the IPL television rights is now a three-cornered one.

Which is great news for the BCCI. An upstart/start-up channel like DSPORT, whose parent Liberty Media has shown aggressive intent in the last few years with its sports play, first in acquiring Eurosport and more recently with the takeover of Formula One, would be expected to show "more of the same" in terms of what it is willing to cough up for Indian media & entertainment's highest valued annual property.

While we have the considered view that the bids for the global rights should fall in the \$ 2.7 billion to \$ 3.2 billion range (₹ 18,000 crore to ₹ 23,000 crore) for the economics to work, with DSPORT in the picture, expect that figure to be breached with ease.

Speaking of disruptors, currently the biggest on the cricket field is the Committee of Administrators appointed by the Supreme Court to run the affairs of the BCCI.

With its mantra of transparency and focus on process, the CoA is likely to want changes in the original IPL tender that was issued last October and subsequently cancelled on the eve of bids being scrutinized/opened.

The earlier tendering format had allowed for a consolidated global bid for all IPL rights, alongside separate bids for television broadcast in India, digital broadcast in India, and international TV plus digital broadcast.

The advantage for global rights bidders was that they could put in one figure for all three rights, without breaking down individual component values.

If, as is now expected, the CoA demands accounting for individual component values in all bids, digital and social platforms like Google and Facebook will likely also seriously consider entering the fray.

IPL bidding apart, these platforms are expected to take long-term positions to build, engage, influence and disrupt the consumer mindscape and consumption patterns.

Also expect eSports leagues to debut on the Indian scene in a big way. With over 19,000 registered gaming professional players in India, 2017 will witness the launch of at least two eSport leagues that will kick-start momentum in the gaming community and beyond.

The announcement in February by leading mobile game publishing company, Nazara Games that it plans to invest \$ 20 million (approximately ₹ 136.0 crore) to launch an eSports league in India is a case in point.

From the virtual space, to leagues on ground, and sea!

First off the blocks was Super Fight League— promoted by British businessman and sports enthusiast Bill Dosanjh and British professional boxing star and two-time world champion Amir Khan. Touted as India's first mixed martial arts promotion, and with a high profile list of top Indian corporates as team owners, the inaugural SFL season ran from 20th January to 25th February.

Then came a powerboat series that had Procam International, torchbearers of the distance running revolution in the country, partnering leading maritime motor sports brand P1 Global.

The NEXA P1 Powerboat, Indian Grand Prix of the Seas, had its inaugural run during the weekend of March 3rd in Mumbai.

Also, at least one more IPL-styled league is confirmed to launch in July. The inaugural Indian Table Tennis League, which could not have its debut last year due to the Rio Olympics, will finally take off in July. Promoter Vita Dani is also the principal owner of Indian Super league franchise, Chennaiyin FC.

Two team sports that have huge potential, but have been hobbled by internecine feuding within the respective federations – Basketball and Volleyball – remain just that. Hobbled. There appears to be no light at the end of the tunnel for the Volleyball Federation of India and the Basketball Federation of India.

As for Basketball, it is the internal feuding that is preventing IMG Reliance, into Year 7 of a 30-year agreement it has granting it all commercial rights to the Hoops Game in India, from holding back the launch of a franchise-based league, ISL style.

One federation that has managed to extricate itself from the morass of internal feuding is the Boxing Federation of India. The Rio Olympics went by before the internal mess could be resolved, but by December, following elections and BFI getting full membership from global governing body AIBA, Indian boxing was back on track.

So much so that BFI president Ajay Singh has revived talk of an Indian franchise in the World Series of Boxing. For the record, India last had a team in WSB in 2011.

Another big plus for Boxing has been the success of Beijing 2008 Olympics Bronze Medalist Vijendar Singh in the professional ranks. Taking it forward, Vijendar's management agency, IOS Boxing Promotions, announced in February the signing of 13 more boxers to their pool of pros.

There is also more than a lot riding on 2017 being the year when Football makes the great leap forward. Come October and India hosts a FIFA tournament for the first time. The tournament will be a milestone event in many ways, but perhaps the most lasting aspect will be development to international standards of the six hosting venues. As too Mission XI Million – the government-supported school contact program that aims at reaching out across 36 cities to more than 15,000 schools and over 11 million children.

That is all still some months down the road. And it is more on the game development side.

On the professional front, while the big debate around the future of football league structure in India will have to wait till 2018 for some clarity, in the here and now, there was a positive development on the distaff side.

The first-ever professional Indian Women's League (IWL), featuring six teams, was played in New Delhi from January 28 till February 14.

The six teams in action were Jeppiar (Puducherry), Eastern Sporting Union (Imphal), Rising Student's Club (Cuttack), Football Club Alakhpura (Haryana), and a team each from I-League and ISL clubs, Aizawl FC and FC Pune City.

From the team front to the individual stars. Virat Kohli, the man who is now Indian sport's biggest brand, has already made a huge statement of how much more is to come.

Before February closed out, the Team India captain had struck pay dirt, signing an endorsement deal with sports lifestyle brand Puma worth ₹ 110.0 crore/\$ 16.18 million over eight years. In the process, the swashbuckling batsman became the first Indian

sportsman to sign an endorsement deal with a single brand worth more than a billion rupees.

As for Indian Sport's woman of the moment, 2017 will spell out for PV Sindhu just how high she can go on the brand endorsement barometer. That she will end the year as the number one among woman is a given though.

And what of 18-year-old Golf prodigy Aditi Ashok, a 2017 LPGA tour rookie. In a stellar 2016 season, she represented India at the Rio Olympics, competed on the Ladies European Tour, and finished second on the Order of Merit.

In India, sponsorship opportunities are limited for golfers, even for the only woman on tour to make a mark internationally. Aditi has an equipment sponsor (Titleist) but would seem to present a great opportunity for other national sponsors. Let's wait and see.

We can't end this look ahead to 2017 without a shout back to the biggest deal in Indian media and entertainment – the IPL. The 10th anniversary of the BCCI's Golden Goose promises to be the biggest ever. Whether it be on-air sales for host broadcaster Sony Pictures Networks India, sponsorship revenues the eight franchises will pull in, or on gate receipts, IPL will set new benchmarks, we predict.

Why the confidence? Paradoxically, it is the disruption caused by end-2016's demonetization, which put a big squeeze on consumption that the cricket carnival should be able to cash in on. The first big release of all that pent-up demand will be seen during the IPL, is how we see matters unfolding.

Which should set things up nicely for the BCCI vis-à-vis the media rights bidding once IPL 10 is done and dusted.

In conclusion, 2017 will be great for Sport. But looking further down the road, ESP Properties and SportzPower expect India's sports market to grow at a faster pace than its GDP over the next decade at least as consumption strengthens, aided by supportive government policy and an increasing demand for recreational sports.

Games people will certainly play... More and more of it!

Summary

Source - ESP Properties

Year	2008 in ₹ (cr)	2009 in ₹ (cr)	2010 in ₹ (cr)	2011 in ₹ (cr)	2012 in ₹ (cr)	2013 in ₹ (cr)	2014 in ₹ (cr)	2015 in ₹ (cr)	2016 in ₹ (cr)
Overall	2423.2	2726.2	4037.2	5313.7	4404.5	4381.1	4616.5	5363.3	6400.0
% Growth		13%	48%	32%	-17%	-1%	9%	16%	19%
On Ground	426.0	420.0	1043.0	705.0	712.0	756.8	794.8	1030.5	1165.2
% Growth		-2%	150%	-30%	1%	6%	5%	30%	13%
Team	437.0	445.0	456.0	724.0	669.0	464.7	493.6	558.0	699.6
% Growth		2%	3%	60%	-8%	-30%	6%	13%	25%
Franchise	284.2	284.2	284.2	617.7	480.5	527.4	482.3	541.3	548.0
	0%	0%	0%	117%	-22%	10%	-8%	12%	1%
Athlete	126.0	127.0	254.0	267.0	293.0	382.2	327.8	416.4	476.4
% Growth		1%	100%	5%	10%	30%	-14%	27%	14%
Media Spends	1150.0	1450.0	2000.0	3000.0	2250.0	2250.0	2518.0	2816.9	3510.8
% Growth		26%	38%	50%	-25%	0%	12%	12%	25%

Year	2008 in \$ (mn)	2009 in \$ (mn)	2010 in \$ (mn)	2011 in \$ (mn)	2012 in \$ (mn)	2013 in \$ (mn)	2014 in \$ (mn)	2015 in \$ (mn)	2016 in \$ (mn)
INR - USD Conversion Rate	43	48	46	47	53	59	61	65	68
Overall	564	568	878	1131	831	743	757	825	941
On Ground	99	88	227	150	134	128	130	159	171
Team	102	93	99	154	126	79	81	86	103
Franchise	66	59	62	131	91	89	79	83	81
Athlete	29	26	55	57	55	65	54	64	70
Media Spends	267	302	435	638	425	381	413	433	516



GroupM is the leading global media investment management company serving as the parent to WPP media agencies including Mindshare, MEC, MediaCom Maxus, Essence and Motivator in India, as well as the programmatic digital media platform, Xaxis, each global operations in their own right with leading market positions. GroupM's primary purpose is to maximize the performance of WPP's media agencies by operating as leader and collaborator in trading, content creation, sports, digital, finance, and proprietary tool development. GroupM's focus is to deliver unrivaled marketplace advantage to its clients, stakeholders and people, and is increasingly working closely for the benefit of clients with WPP's data investment management group, Kantar. Together GroupM and Kantar account for over 50% of WPP's group revenues of more than \$20 billion.





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

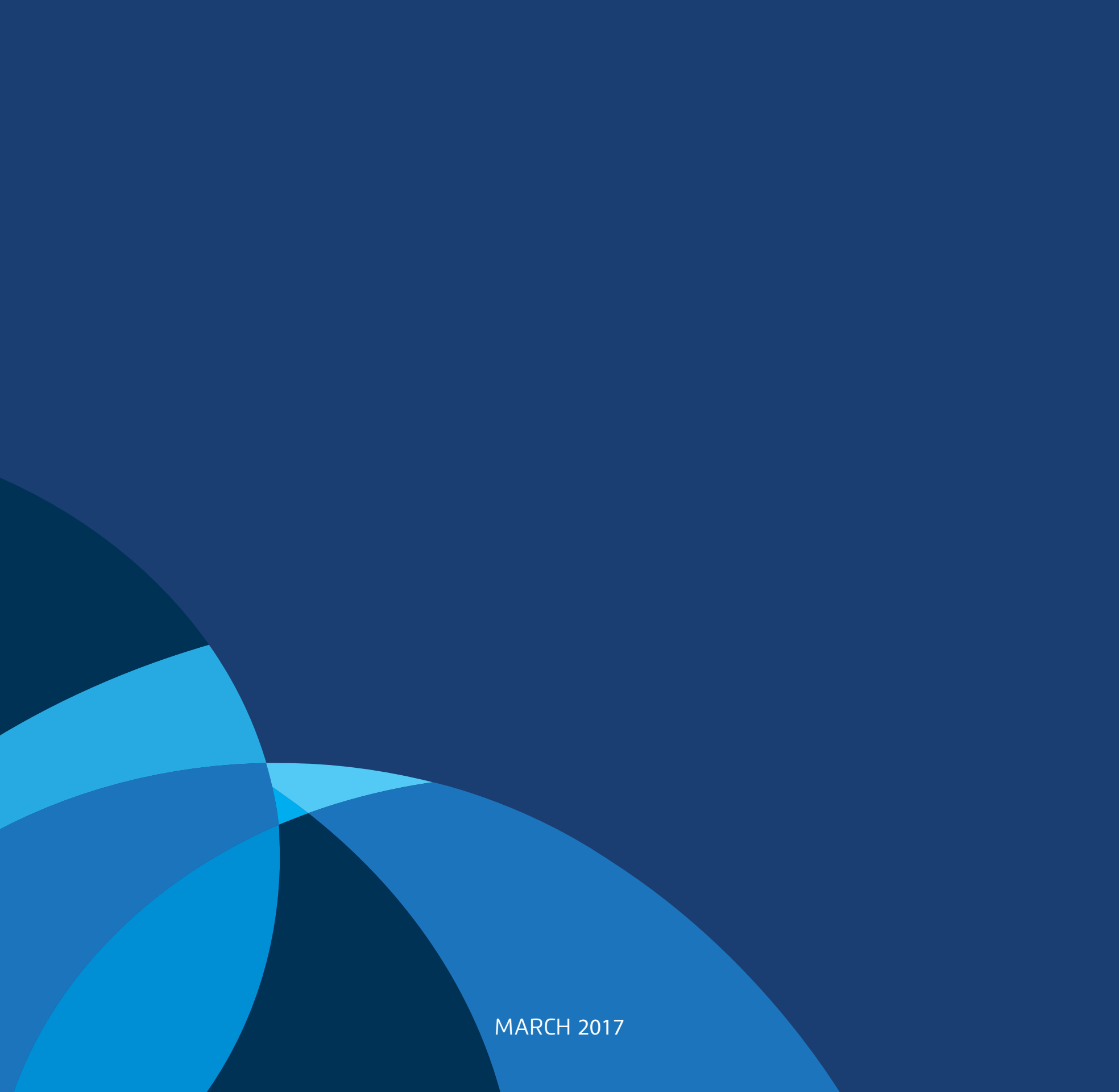
SportzPower is the media brand from Sportz Network Pvt Ltd, an independently-owned company operating in the significant areas of media, marketing, and events in India's fast developing sports industry. SportzPower has established itself as a credible source for current and comprehensive information, 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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