

# CRICKET IN INDIA

IT'S NOT JUST A  
GAME



THINK

NEWSLETTER 2019







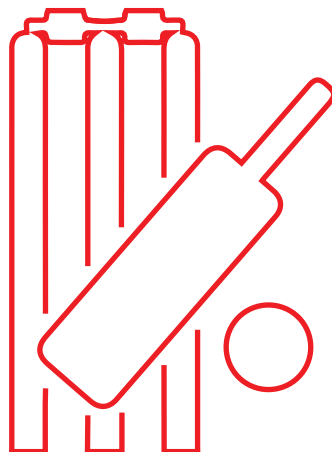
# Introduction

India is now being referred to a Sporting nation in the making and the television viewership stats prove just that. It reveals that sports in India is a potent genre. The sports fervor has seen fans going all out to display their love and loyalty for their favorite team or star player. Marketers understand the immense power of this cult of sports enthusiasts to increase brand visibility, popularity and perceived value in the minds of hundreds and thousands of viewers of Sports.

The popularity of sports in the country is largely driven by Cricket. The game is truly a religion here, seeping into the warp and weft of the social fabric of our lives. The growing supply of cricket content both on sports channels and others as well as the growing audiences are testimony to the fact that cricket will continue to reign its numero uno spot in India.

In this edition of THiNK we analyze the impact of Cricket on television viewership. We have explored viewership at various angles like format of the game, India matches, popular leagues and so on.

Let's Play!





## 766 MN VIEWERS

766 Mn viewers sampled sports content in 2018.



## 93% VIEWERS

93% of all sports viewers in 2018 watched cricket content.



## 35% OF LIVE CRICKET VIEWERSHIP BY YOUTH

Youth continues to be the highest consumer of Live cricket with 35% viewership of Live cricket contributed by 15-30 year olds in 2019.



## 51% NCCS AB CRICKET VIEWERS

Share of NCCS AB cricket viewers is on the rise and stands at 56% for the first 21 weeks of 2019.



## 342 MN WOMEN VIEWERS

Women form 48% of cricket viewers for 2018 with 342 Mn viewers.



## INDO-PAK CRICKETING LEGACY

India Pakistan ODIs live up to the hype and garner enormous viewership. The top 2 ODI matches in the 2016 to 2018 period are matches played between these neighbouring nations.



## IPL SCORES

IPL scores year over year, growing both in terms of viewers as well as average watch time per viewer – 28 minutes to 34 minutes from 2016 to 2018.



## WOMEN'S CRICKET

Women's cricket scores on R01 as compared to International T20 leagues and Domestic cricket. The Women's World Cup Final between India & England had a viewership of 39 Mn impressions.





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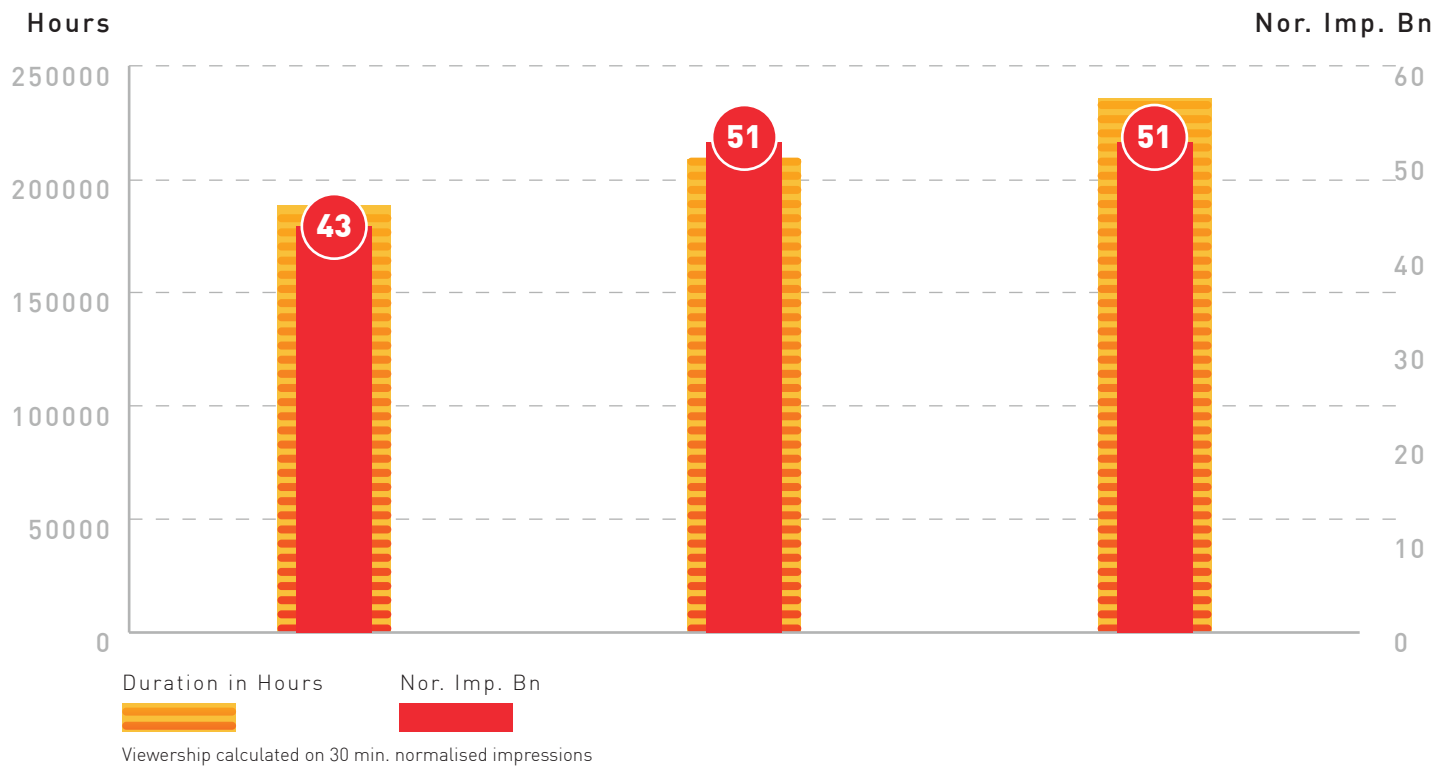


#1



# SPORTS IN INDIA – AN OVERVIEW

## Sports Viewership and Airtime

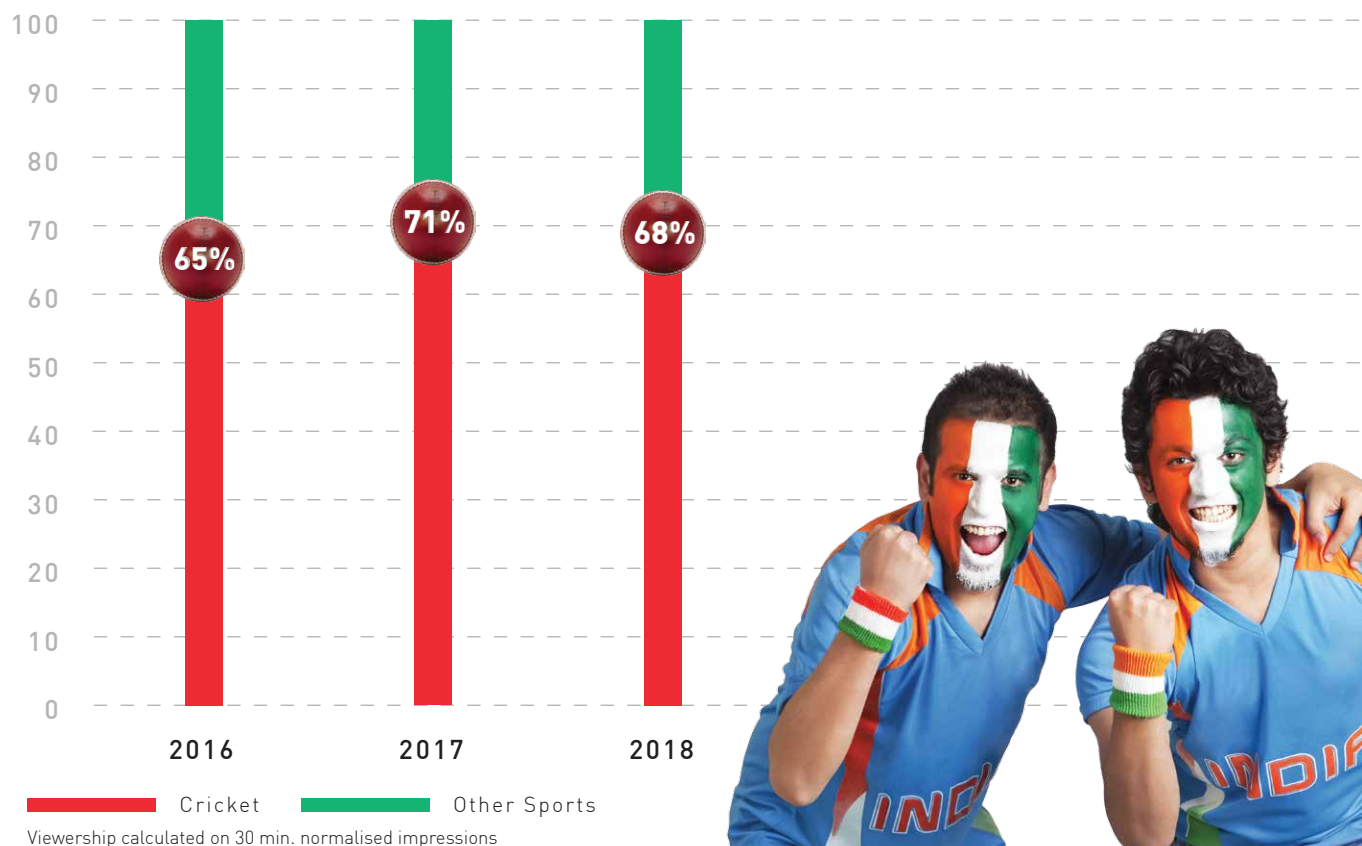


## Sports viewership

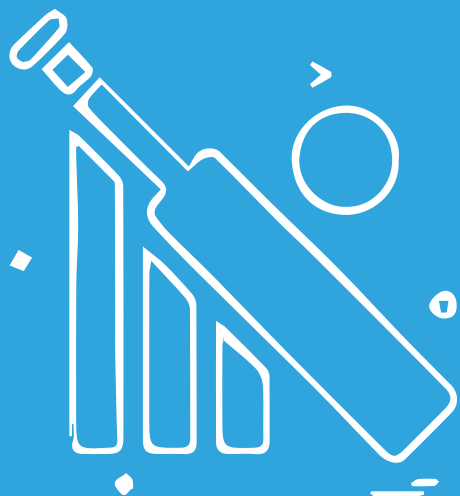
Sports viewership year-on-year has gone up in the 2016 to 2018 period. From 43 Bn impressions in 2016 the viewership has gone up to 51 Bn impressions, growing at a CAGR of 9%. Though other sports like Kabaddi, Wrestling,

Football are gaining popularity within the Indian audiences, Cricket is the jewel in the sports viewership crown with upwards of 65% of viewership contribution year-on-year. Details in the figure below.

### Nor Imp. Bn



# #2



# CRICKET VIEWERSHIP IS ON THE RISE

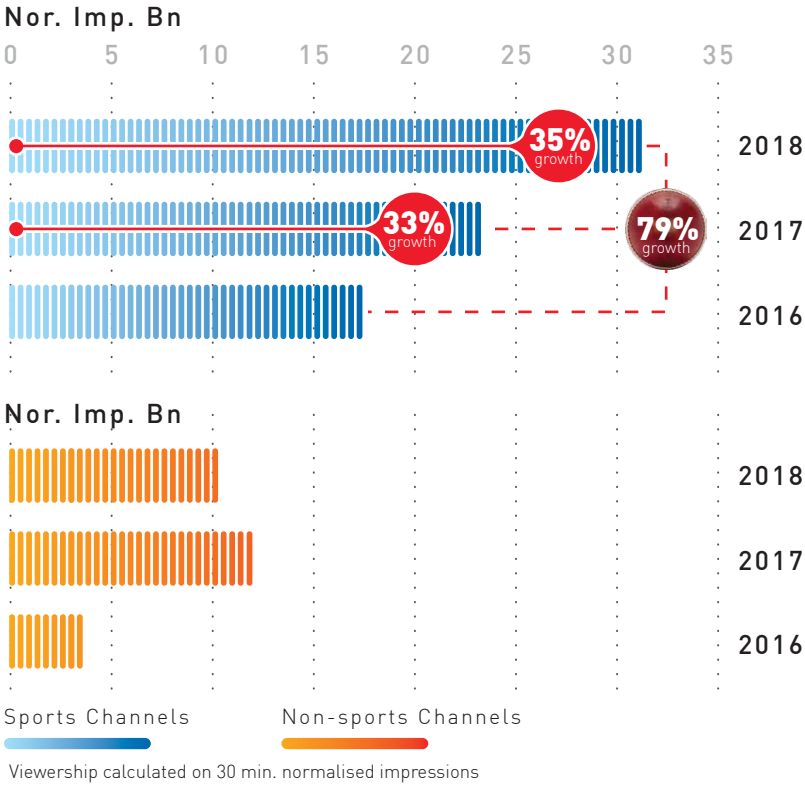


### Cricket Viewership on Sports Channels

Interestingly, the footprint of cricket is not just restricted to sports channels and goes well beyond them. Overall, there is 25% growth of cricket viewership in 2018 over 2016, for the same period, cricket viewership on sports channels grew by 79%.

### Cricket Viewership on Non-sports Channels

The dynamics of live cricket on Non-sports channels has seen a change from 2018. The drop in non- sports channels viewership for cricket content in 2018 can be attributed to majority of IPL-12 telecast moving to channels in the Sports genre.

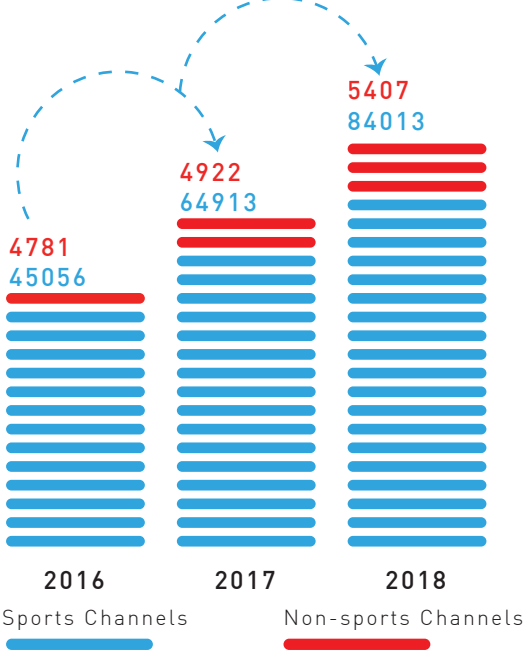


### Surge In Programming as well as Sports Channels

The last 3 years have seen a steady increase in cricket content on sports channels. Apart from international cricket matches to the national favourite IPL, viewers today have a wide array of choice. From domestic competitions like the

Ranji Trophy, the Duleep Trophy, the Vijaya Hazare Trophy etc to International T20 Leagues like Big Bash League, Mzansi Super League, Pakistan Super League etc to popular celebrity leagues we can see it all on the small screen.

### Hours of Content



Cricket content on television is approaching the 1 Million hour mark annually, with 89000 hours being clocked in 2018. Non-sports channels carried 4700 hours of cricket content in 2016 and upwards of 5400 hours in 2018. Some news channels have the same cricket program titles running over last 3 years.

### Number of Channels

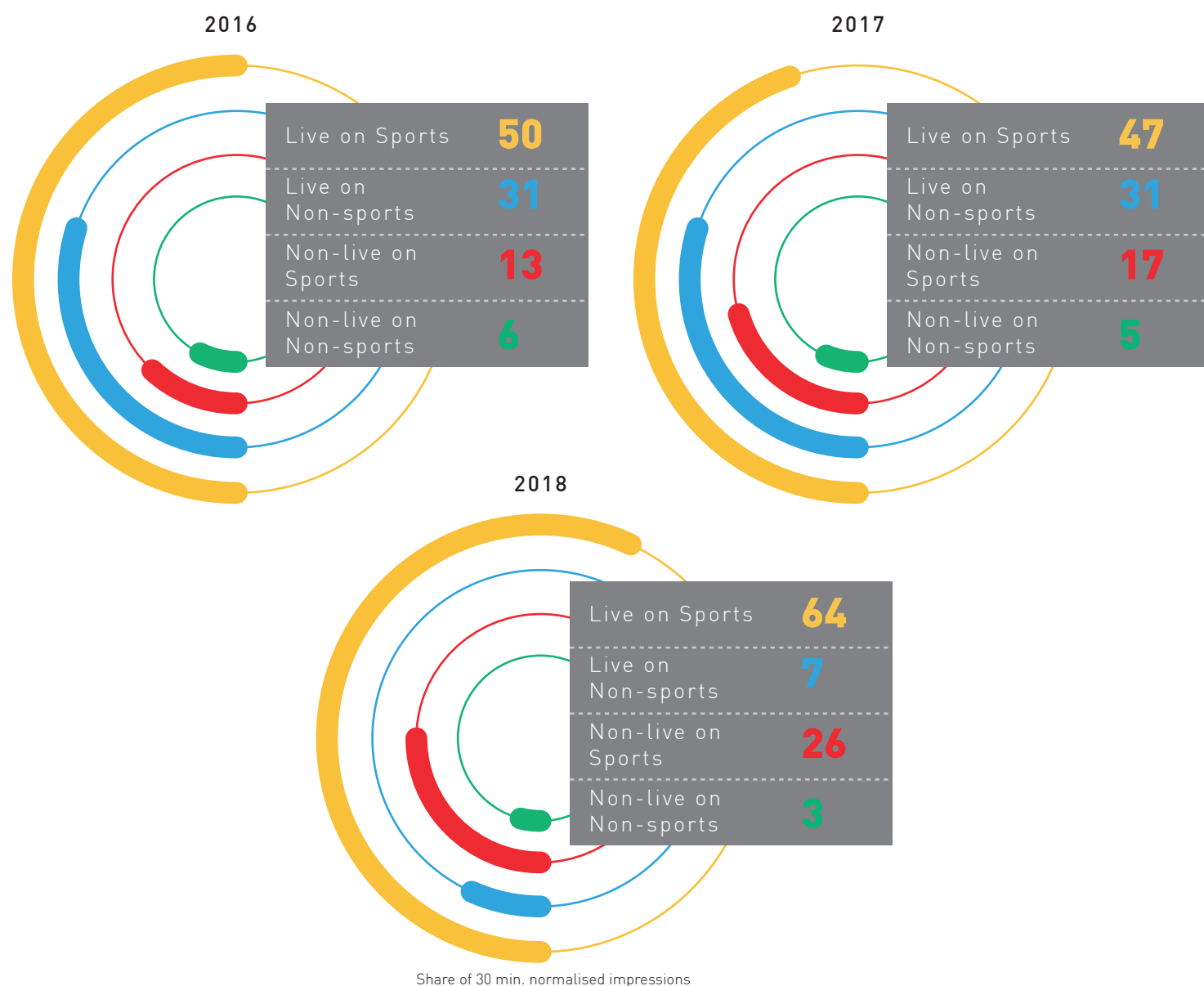
Year	Sports Channels	Non-sports Channels
2016	19	111
2017	32	153
2018	29	159

Number of sports channels have witnessed a steady rise on the back of both HD channels and regional channel launches. Popular matches are also simulcasted on Non-sports channels and this number has gone north as well. Non-live cricket content also makes up for respectable airtime.

## With Over 89000 Hours, Cricket Programming Up By 79% In 2018 Over 2016

Cricket Content Split	2016	2017	2018
Live Cricket - Sports Channels	20%	14%	14%
Live Cricket - Other Channels	2%	1%	2%
Non-Live Cricket : Sports Channels	70%	78%	80%
Non-Live Cricket : Other Channels	8%	6%	4%
Cricket Content (Hours)	49837	69835	89420

## Live Cricket Viewership Stands at >70% of Total Cricket Viewership in 2018



**#3**



# LIVE CRICKET OVERVIEW

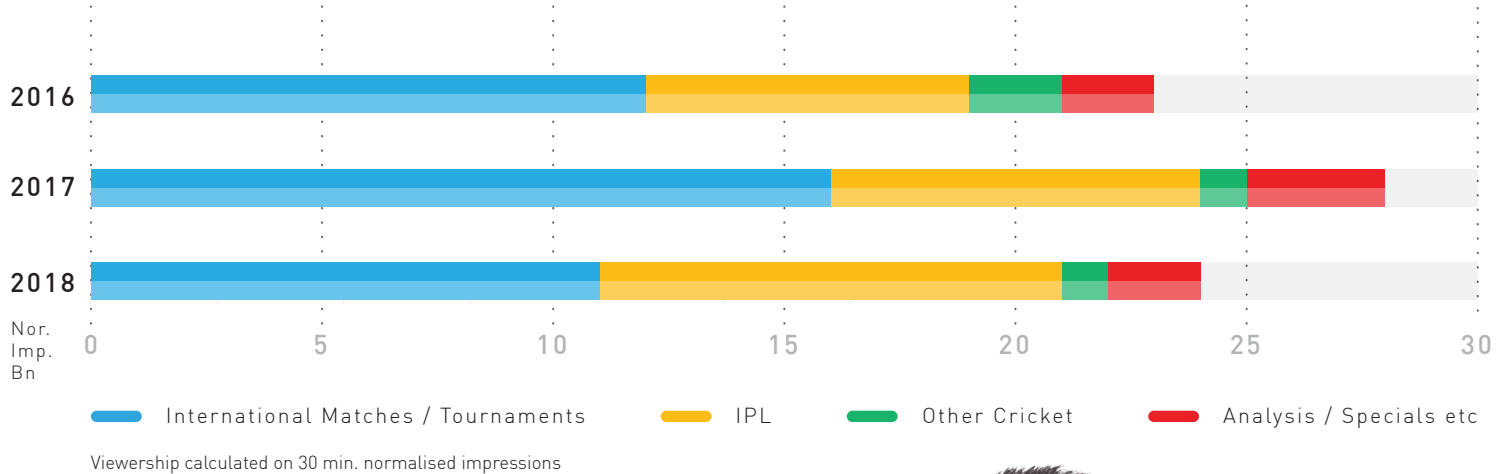


## What was watched?

T20 World Cup in 2016 and Champions Trophy in 2017 contributed 21% & 14% to the total cricket viewership of the year respectively.

The absence of any major ICC event results in 28% drop in the international cricket viewing for 2018. **IPL in 2018 grows by 19% over the previous year**

### Cricket Viewership

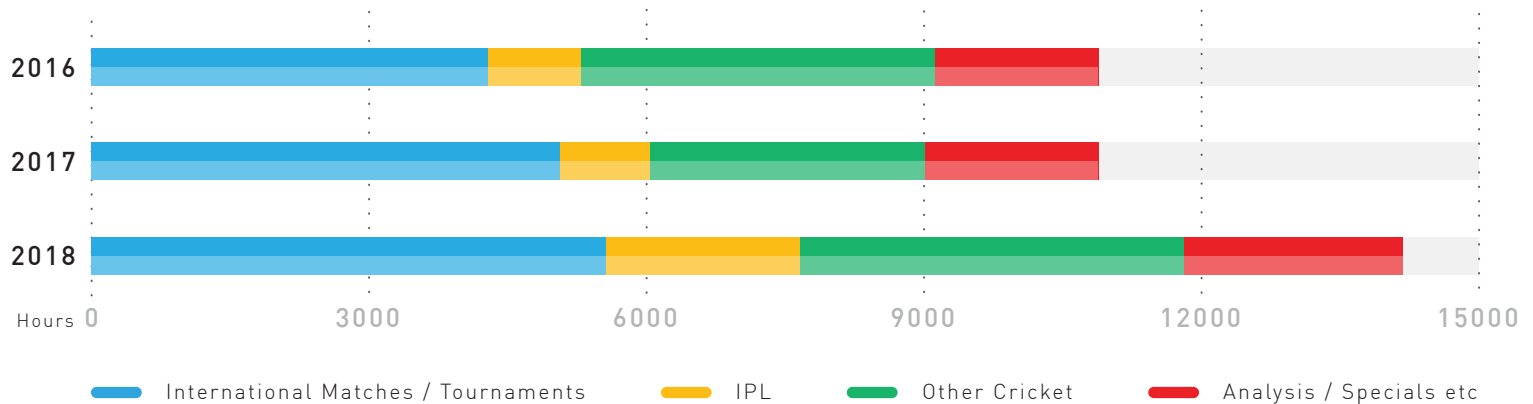


## No dearth of live cricket content

Live cricket content contributed to a minority share to (22% in 2016, 15% in 2017 and 16% in 2018) cricket content telecast. But in absolute terms, live cricket has grown by 30% from 10882 hours in 2016 to 14180 hours in 2018.



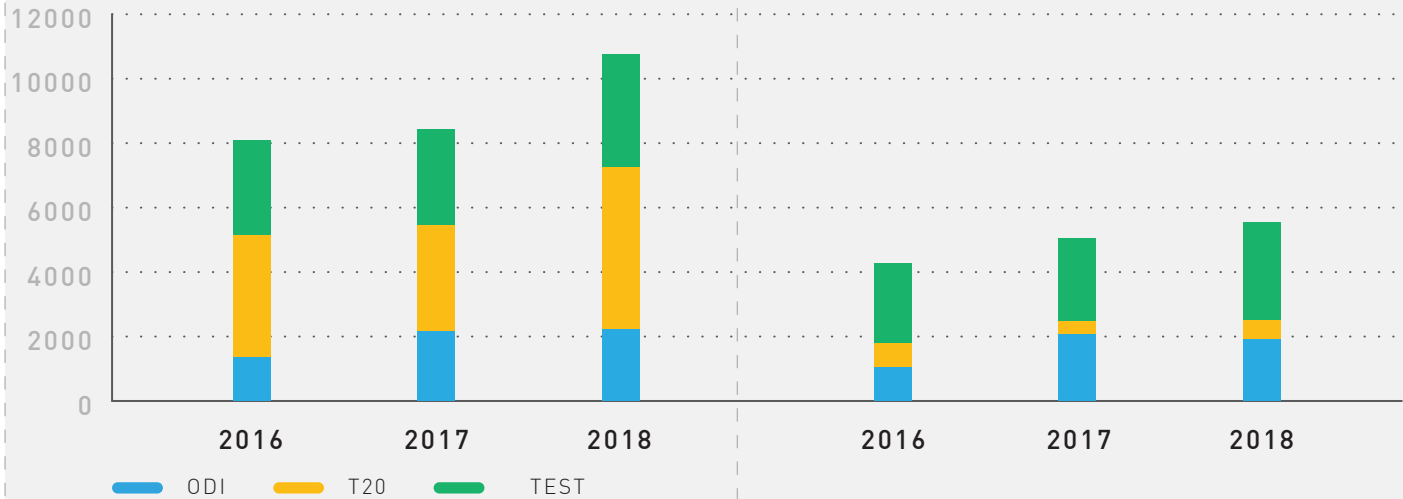
### Cricket Content



## ACROSS ALL MATCHES

## INTERNATIONAL MATCHES

Telecast Time (Hours)



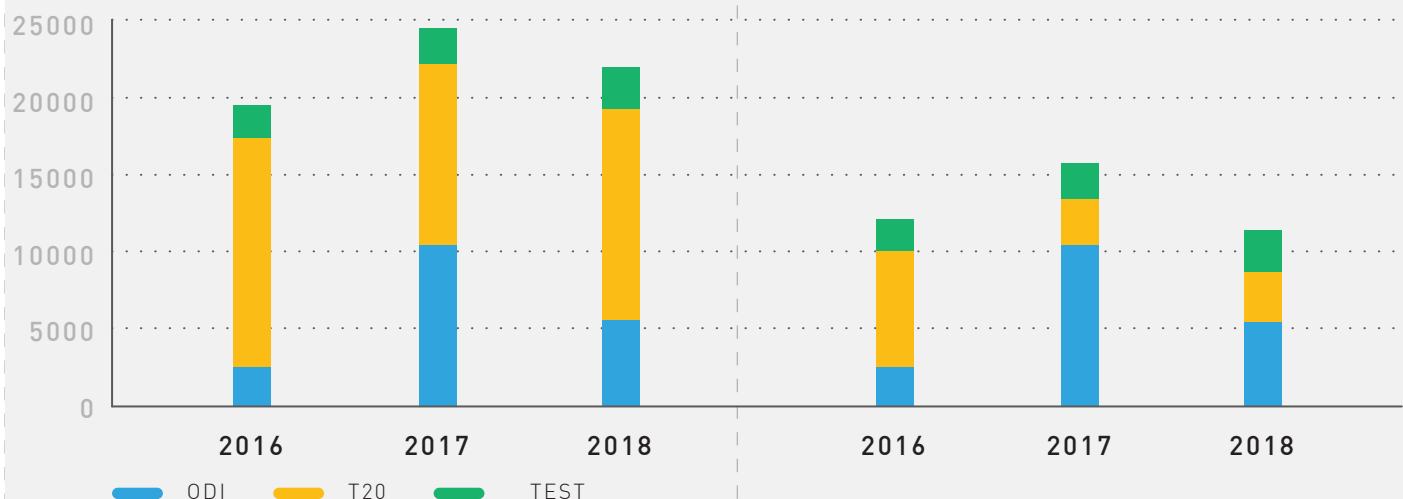
The T20 format has gained popularity over the years and multiple leagues have mushroomed both internationally and locally. This format dominates content as well as viewership on television.

The biggest international extravaganza of a particular year dominates cricket viewership : T20 World Cup in 2016 and Champions Trophy in 2017 . However, with the sheer number of games being played between first class cricket playing nations across the long format of the game – Test cricket is high on telecast time when it comes to international matches.

## ACROSS ALL MATCHES

## INTERNATIONAL MATCHES

Viewership (Nor. Imp. Mn)



Viewership calculated on 30 min. normalised impressions

#4



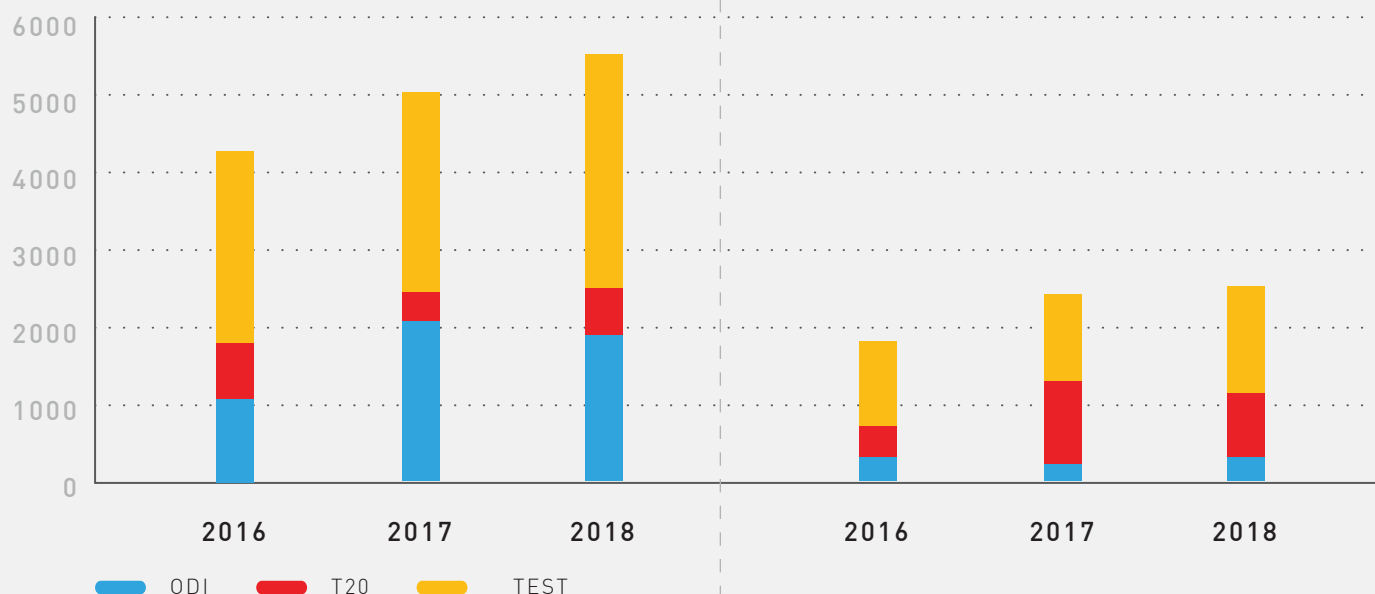
# THE INDIA CRICKET STORY



## ALL TEAMS

## INDIA MATCHES

Telecast Time (Hours)

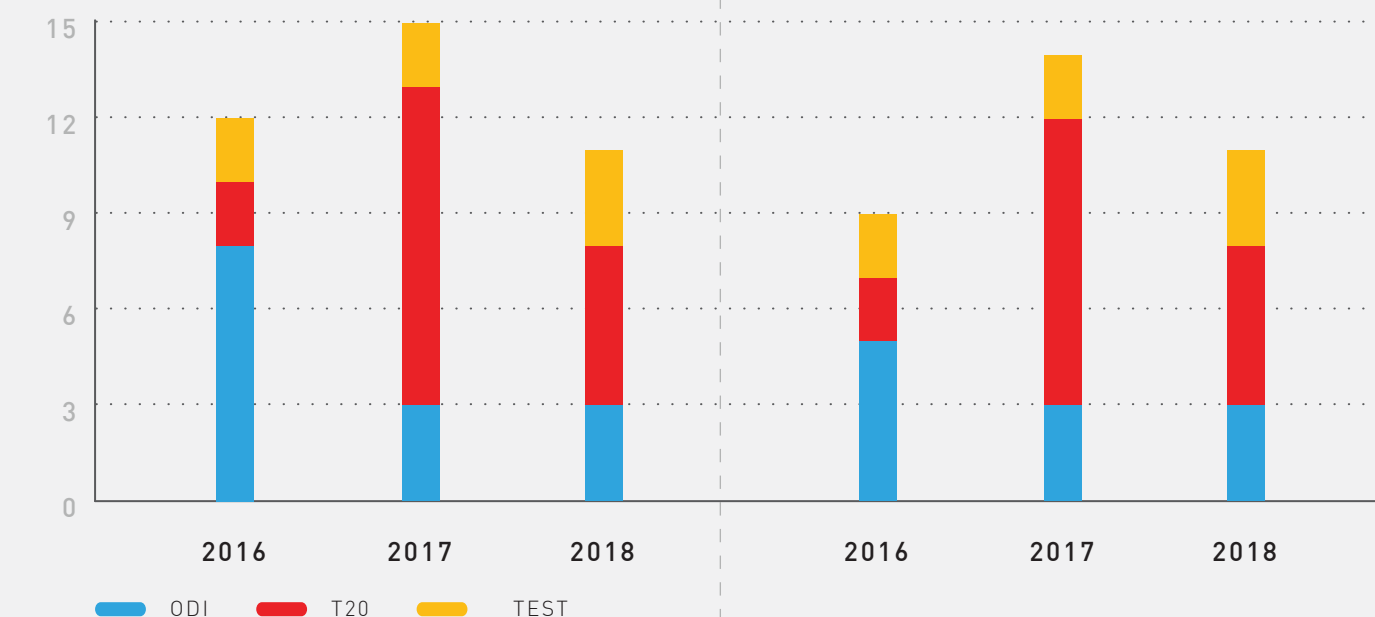


In terms of airtime, India matches account for >50% of all international matches telecast on television. However, the viewership lens shows the clear preference of Indian viewers for India matches accounting for 78%, 92% and 91% in 2016, 2017 and 2018 respectively.

## ALL TEAMS

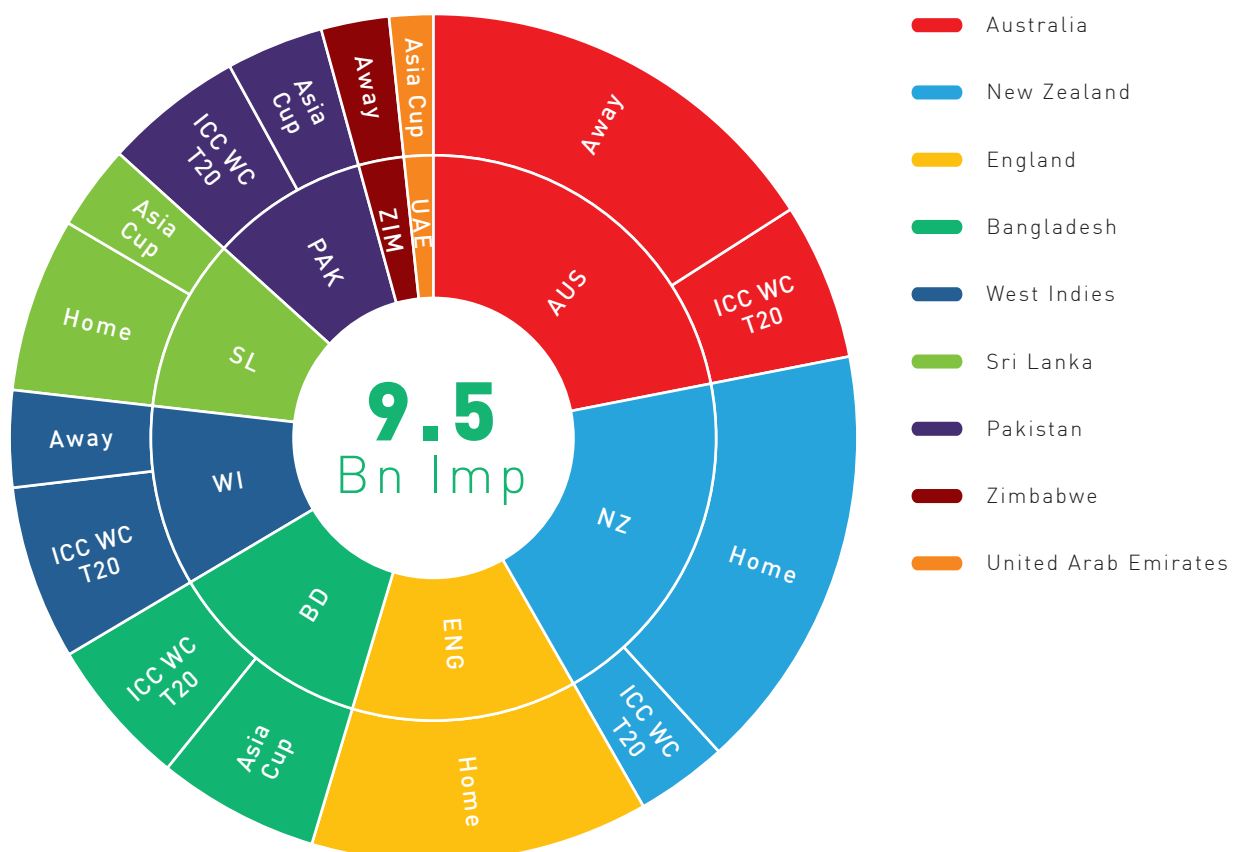
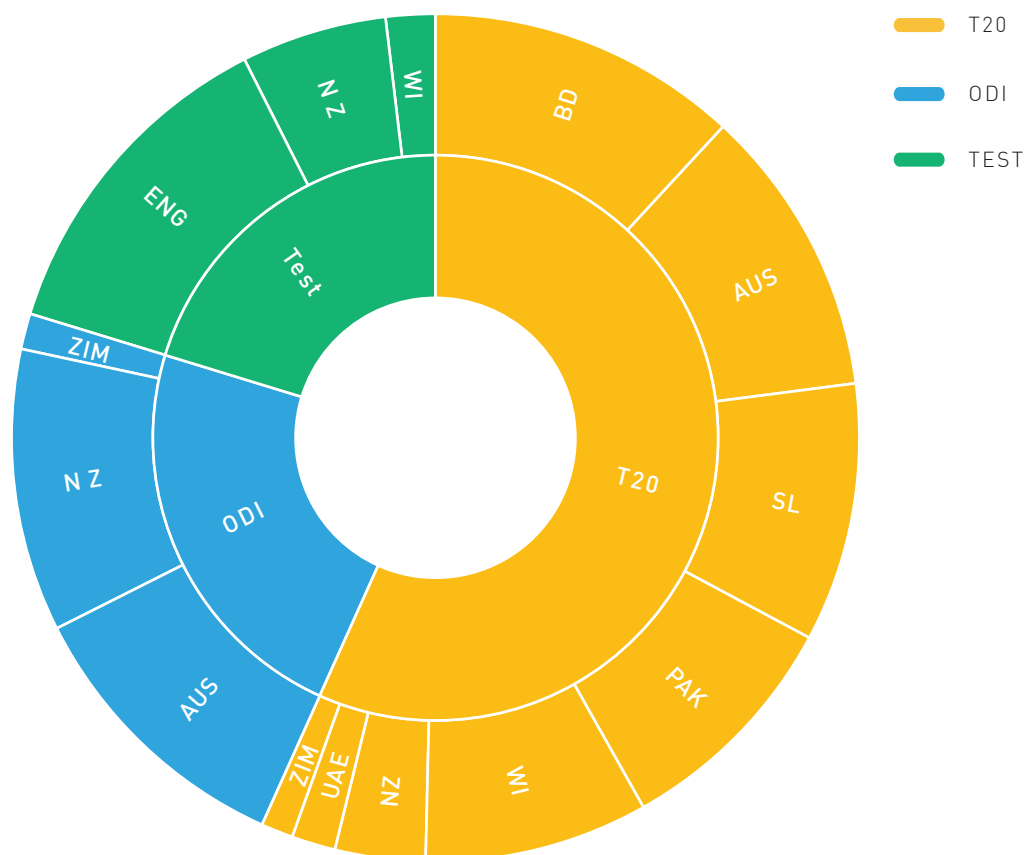
## INDIA MATCHES

Viewership (Nor. Imp. Bn)



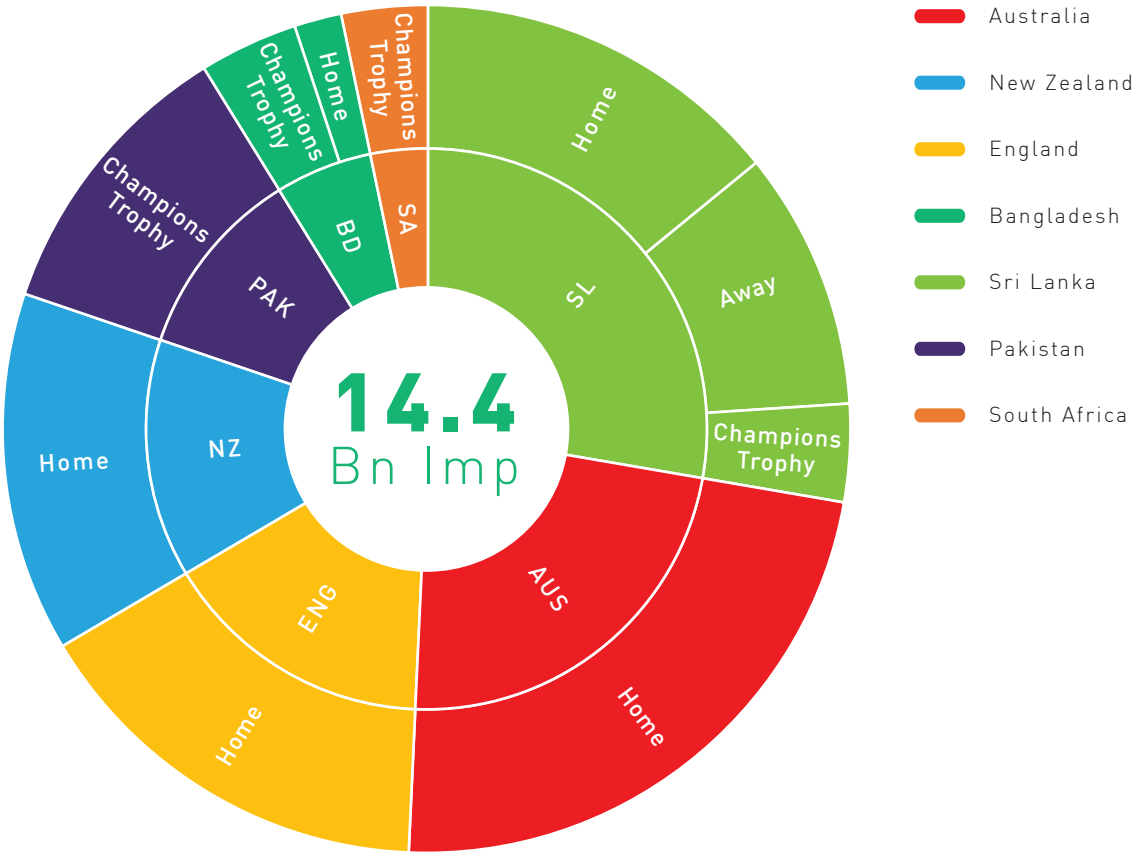
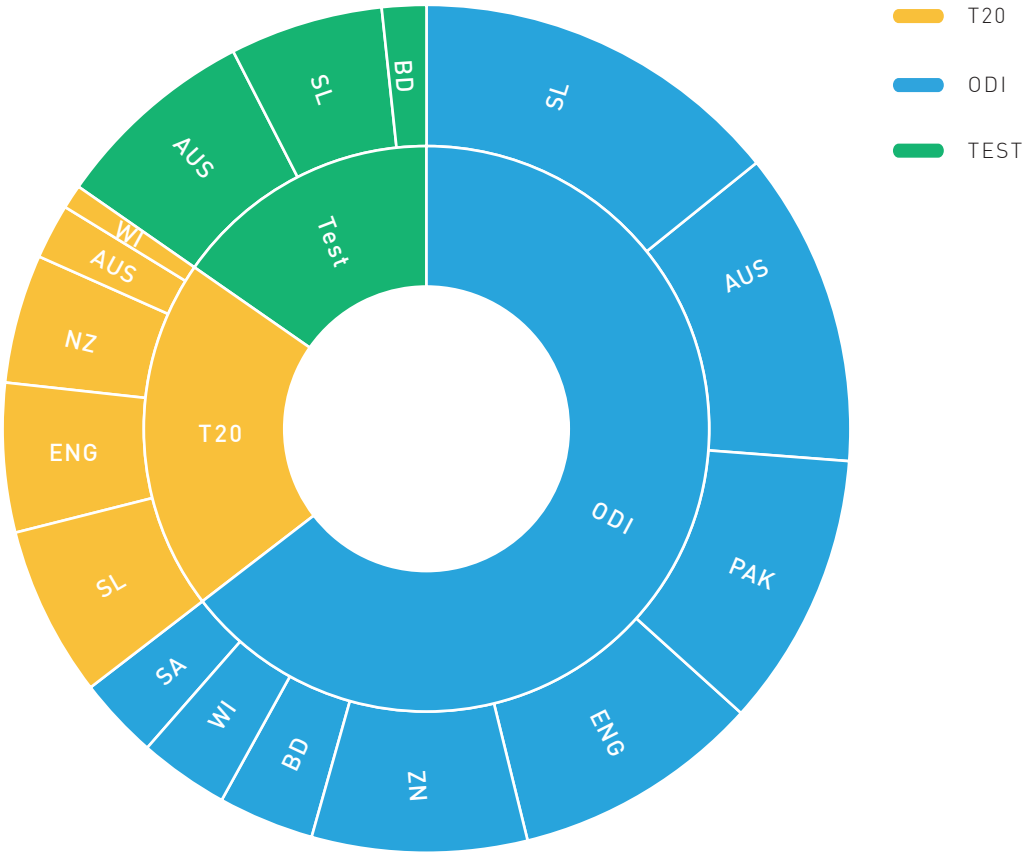
Viewership calculated on 30 min. normalised impressions

## 2016 : Viewership dominated by T20 matches – World Cup & Asia Cup



India International Matches. Share of 30 min. normalised impressions

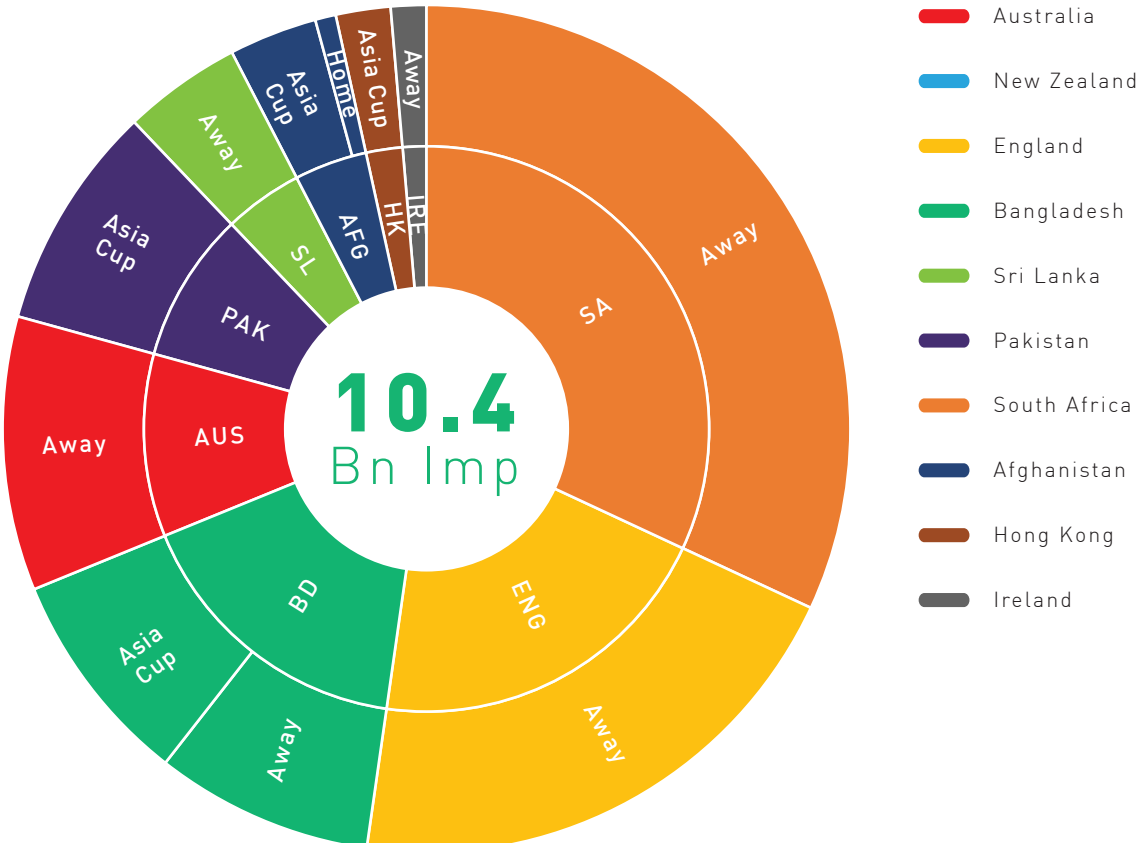
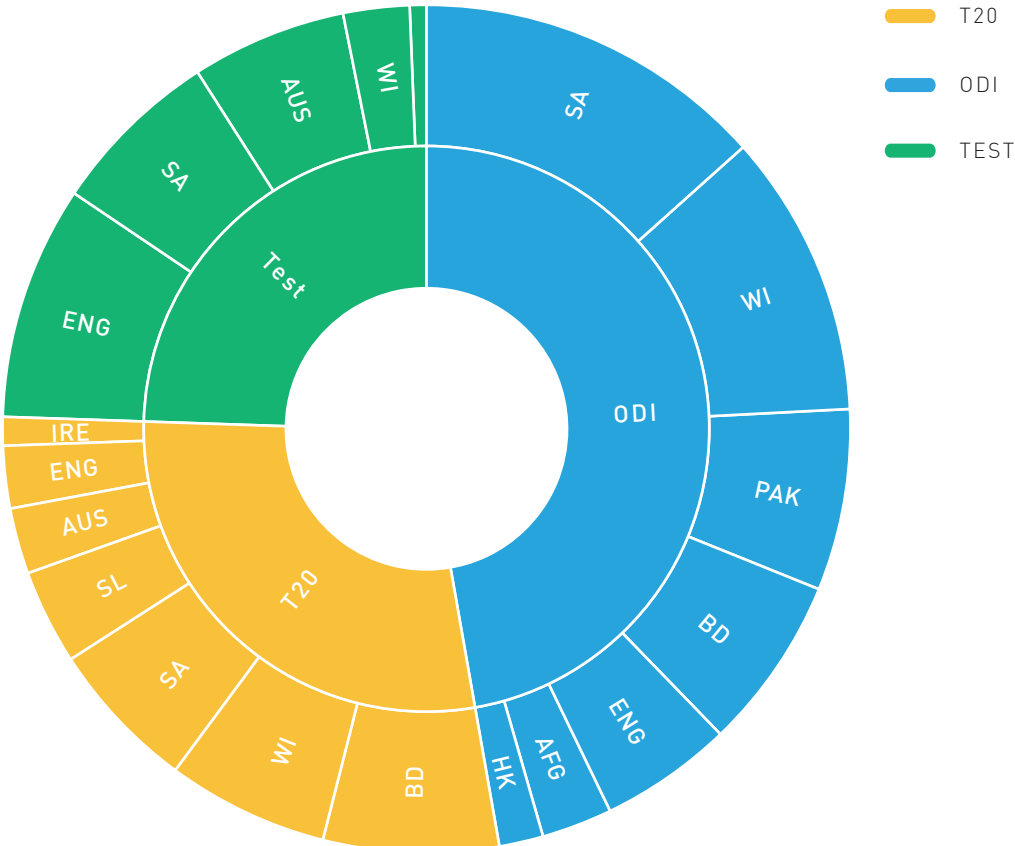
2017 : The Return of the ODI Format



India International Matches. Share of 30 min. normalised impressions

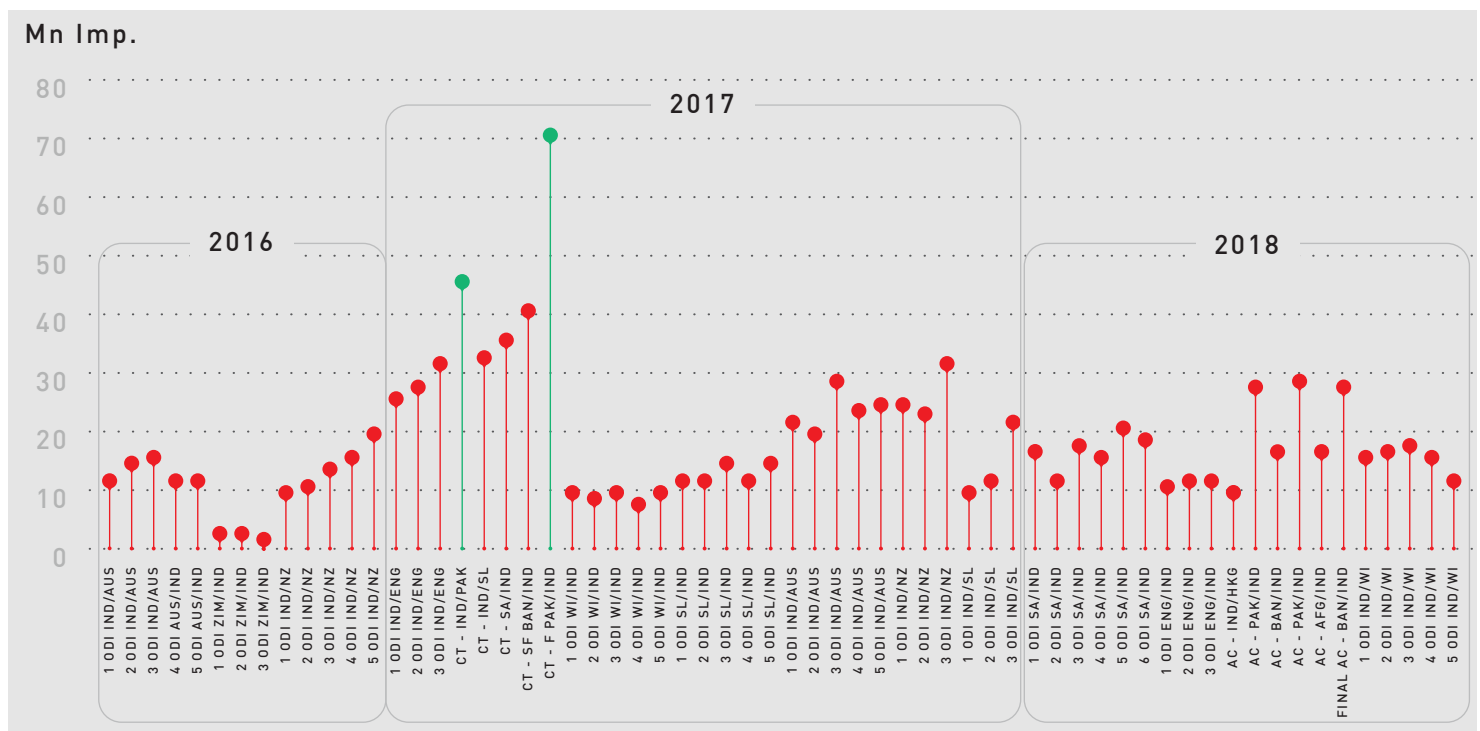


## 2018 : A Touring year for India



India International Matches. Share of 30 min. normalised impressions

## ODI viewership across 2016 to 2018

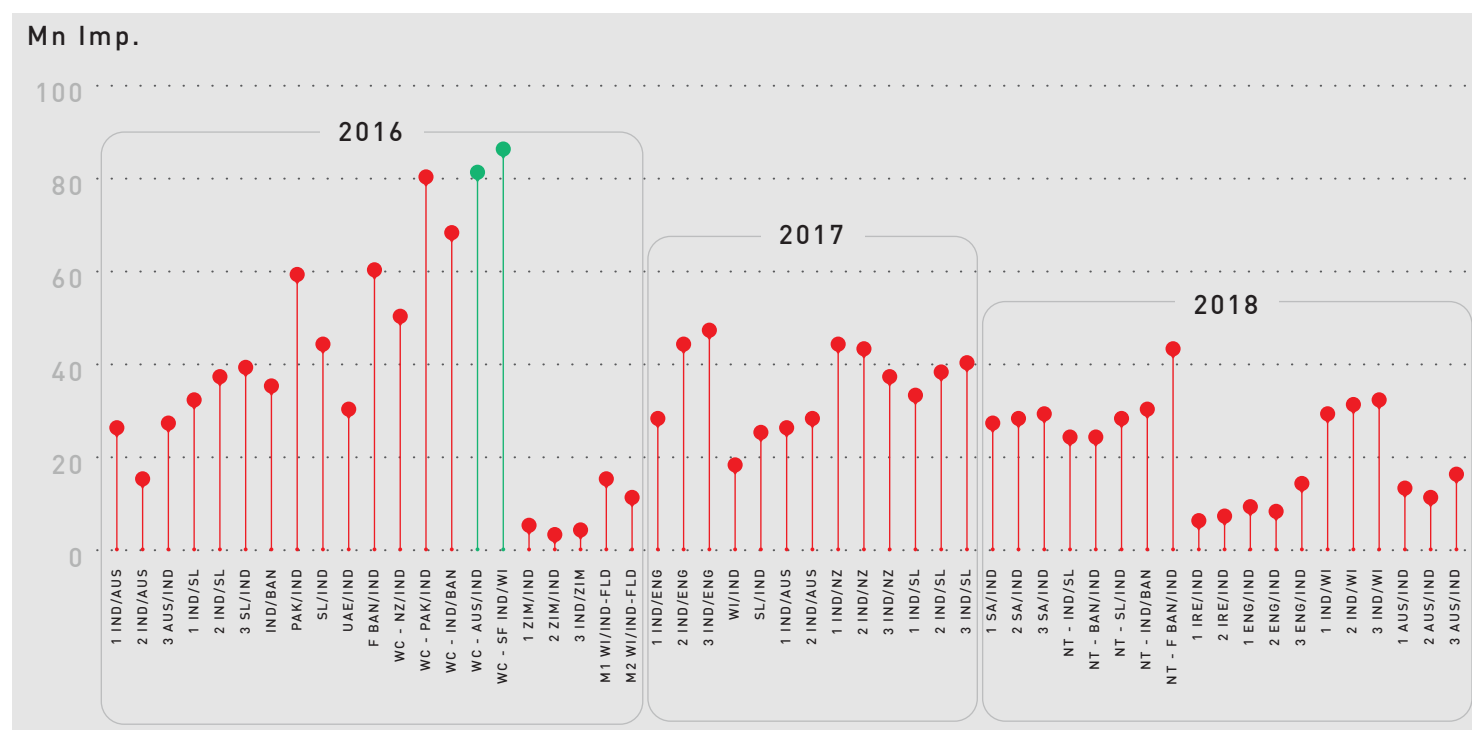


India : ODIs Viewership	2016	2017	2018
Matches Played	13	29	20
Viewership (Mn Imp)	160	698	367
Share of Sports Channels	69%	64%	100%
Share of Other Channels	31%	36%	
Won	46%	72%	70%
Lost	54%	27%	21%
NR / Tied / Drawn		1%	
Home	47%	45%	22%
Away	53%	55%	78%

Share of viewership

Top 5 Matches - 2016	Mn Imp.	Top 5 Matches - 2017	Mn Imp.	Top 5 Matches - 2018	Mn Imp.
L/t Paytm-16 5 Odi IND/NZ	21	L/t Icc Champ Tro-17 F PAK/IND	72	Asia Cup-18 S4 PAK/IND-dub	30
L/t Vb Series Odi-16 3 Odi IND/AUS	17	L/t Icc Champ Tro-17 IND/PAK	47	Asia Cup-18 M5 PAK/IND-dub	29
L/t Paytm-16 4 Odi IND/NZ	17	L/t Icc Champ Tro-17 Sf BAN/IND	42	Asia Cup-18 F BAN/IND-dub	29
L/t Vb Series Odi-16 2 Odi IND/AUS	16	L/t Icc Champ Tro-17 SA/IND	37	L/t Momentum Cup-18 5 Odi SA/IND	22
L/t Paytm-16 3 Odi IND/NZ	15	L/t Icc Champ Tro-17 IND/SL	34	L/t Momentum Cup-18 6 Odi SA/IND	20

## T20 viewership across 2016 to 2018

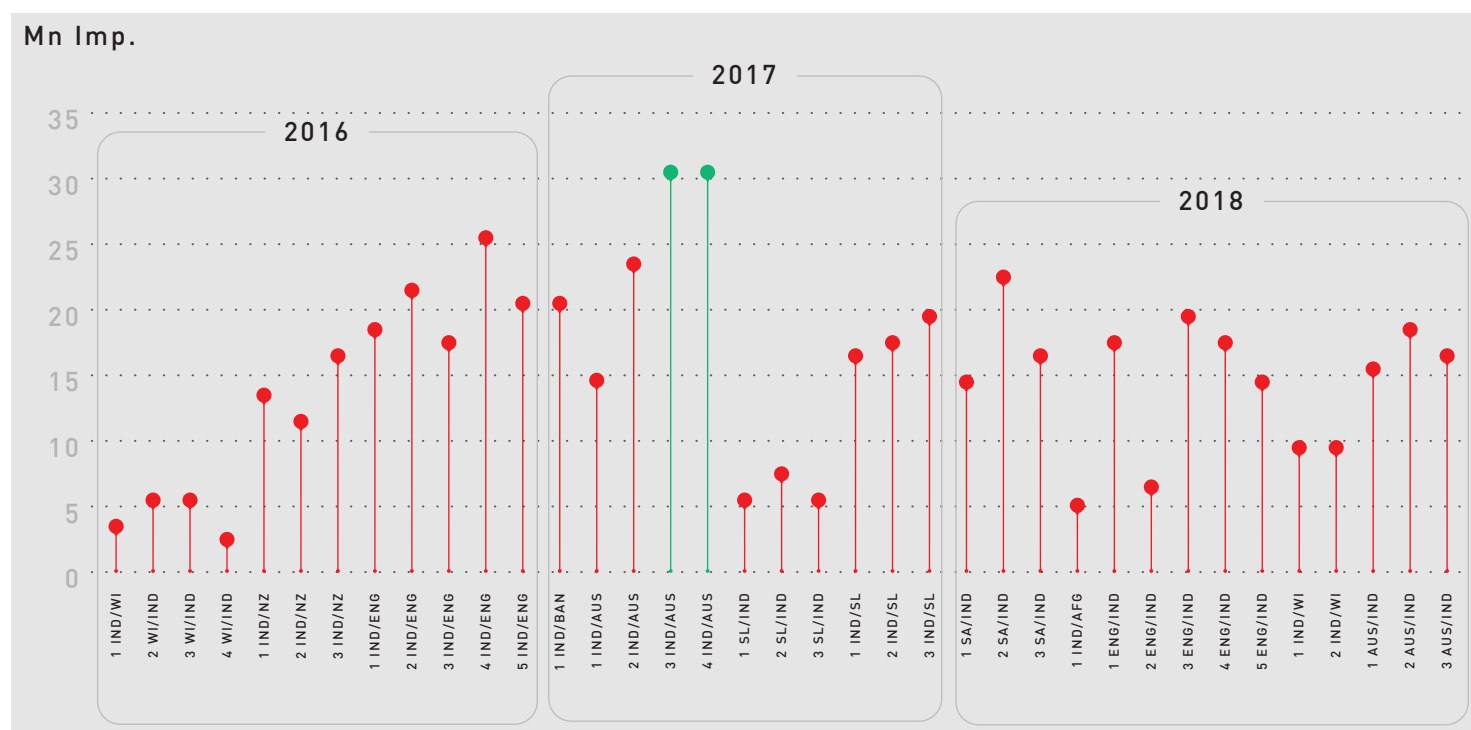


India : T20s Viewership	2016	2017	2018
Matches Played	21	13	19
Viewership (Mn Imp)	849	476	446
Share of Sports Channels	67%	72%	84%
Share of Other Channels	39%	28%	16%
Won	74%	74%	49%
Lost	25%	26%	48%
NR / Tied / Drawn	2%		3%
Home	58%	90%	22%
Away	42%	10%	78%

Share of viewership

Top 5 Matches - 2016	Mn Imp.	Top 5 Matches - 2017	Mn Imp.	Top 5 Matches - 2018	Mn Imp.
L/t Icc Wc T20-16 Sf IND/WI	88	L/t Paytm-17 3 T20 IND/ENG	49	Nidahas Trophy-18 F BAN/IND	45
L/t Icc Wc T20-16 S10 AUS/IND	83	L/t Paytm-17 2 T20 IND/ENG	46	L/t Paytm-18 3 T20 IND/WI	34
L/t Icc Wc T20-16 S10 PAK/IND	82	L/t Paytm-17 1 T20 IND/NZ	46	L/t Paytm-18 2 T20 IND/WI	33
L/t Icc Wc T20-16 S10 IND/BAN	70	L/t Paytm-17 2 T20 IND/NZ	45	Nidahas Trophy-18 IND/BAN	32
Asia Cup T20-16 F BAN/IND	62	L/t Paytm-17 3 T20 IND/SL	42	L/t Paytm-18 1 T20 IND/WI	31

## Test Match viewership across 2016 to 2018



India : Test Viewership	2016	2017	2018
Matches Played	12	11	14
Viewership (Mn Imp)	168	197	211
Share of Sports Channels	100%	100%	100%
Share of Other Channels			
Won	84%	57%	46%
Lost		8%	54%
NR / Tied / Drawn	16%	36%	
Home	89%	90%	14%
Away	11%	10%	86%

### Share of Impressions

Top 5 Matches - 2016	Mn Imp.	Top 5 Matches - 2017	Mn Imp.	Top 5 Matches - 2018	Mn Imp.
L/t Paytm-16 4 Test IND/ENG	26	L/t Paytm-17 4 Test IND/AUS	31	Freedom Cup-18 2 Test SA/IND	23
L/t Paytm-16 2 Test IND/ENG	22	L/t Paytm-17 3 Test IND/AUS	31	Specsavers-18 3 Test ENG/IND	20
L/t Paytm-16 5 Test IND/ENG	21	L/t Paytm-17 2 Test IND/AUS	24	Domain-18-19 2 Test AUS/IND	19
L/t Paytm-16 1 Test IND/ENG	19	L/t Paytm-17 1 Test IND/BAN	21	Specsavers-18 4 Test ENG/IND	18
L/t Paytm-16 3 Test IND/ENG	18	L/t Paytm-17 3 Test IND/SL	20	Specsavers-18 1 Test ENG/IND	18

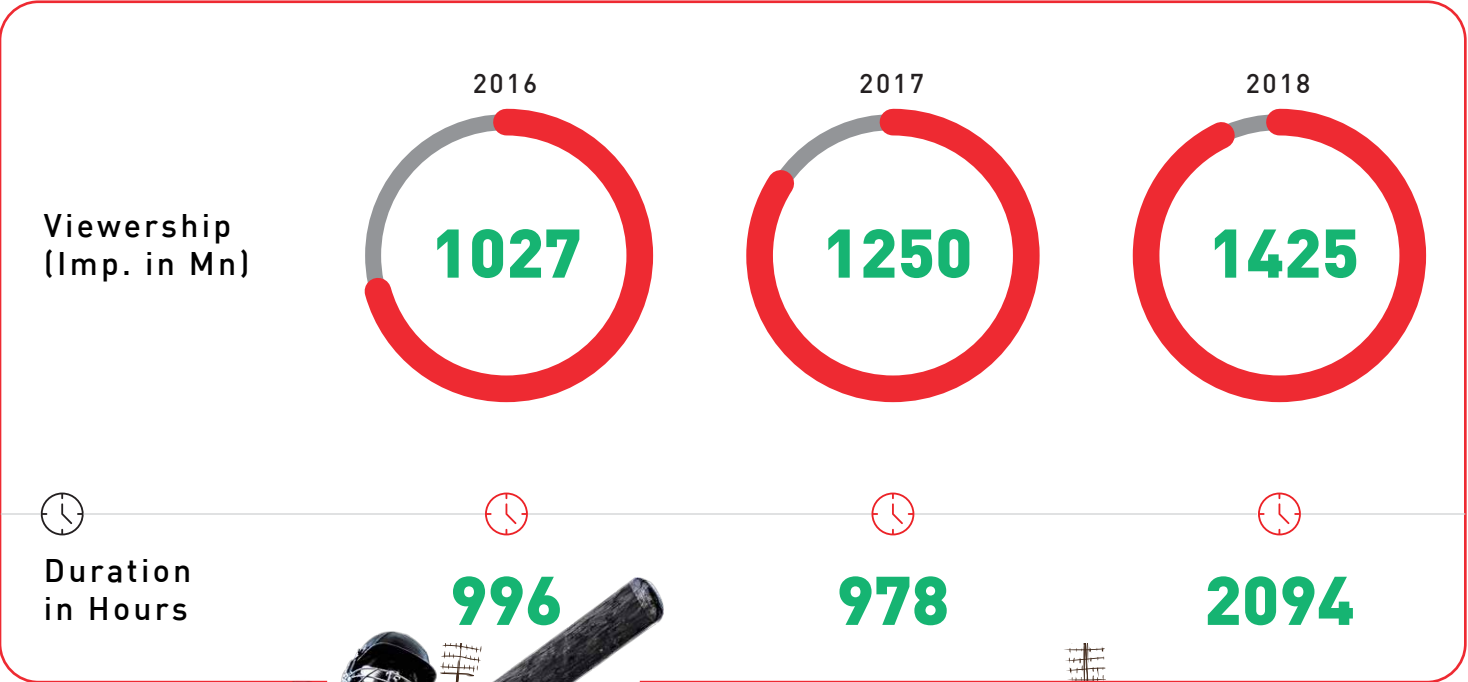


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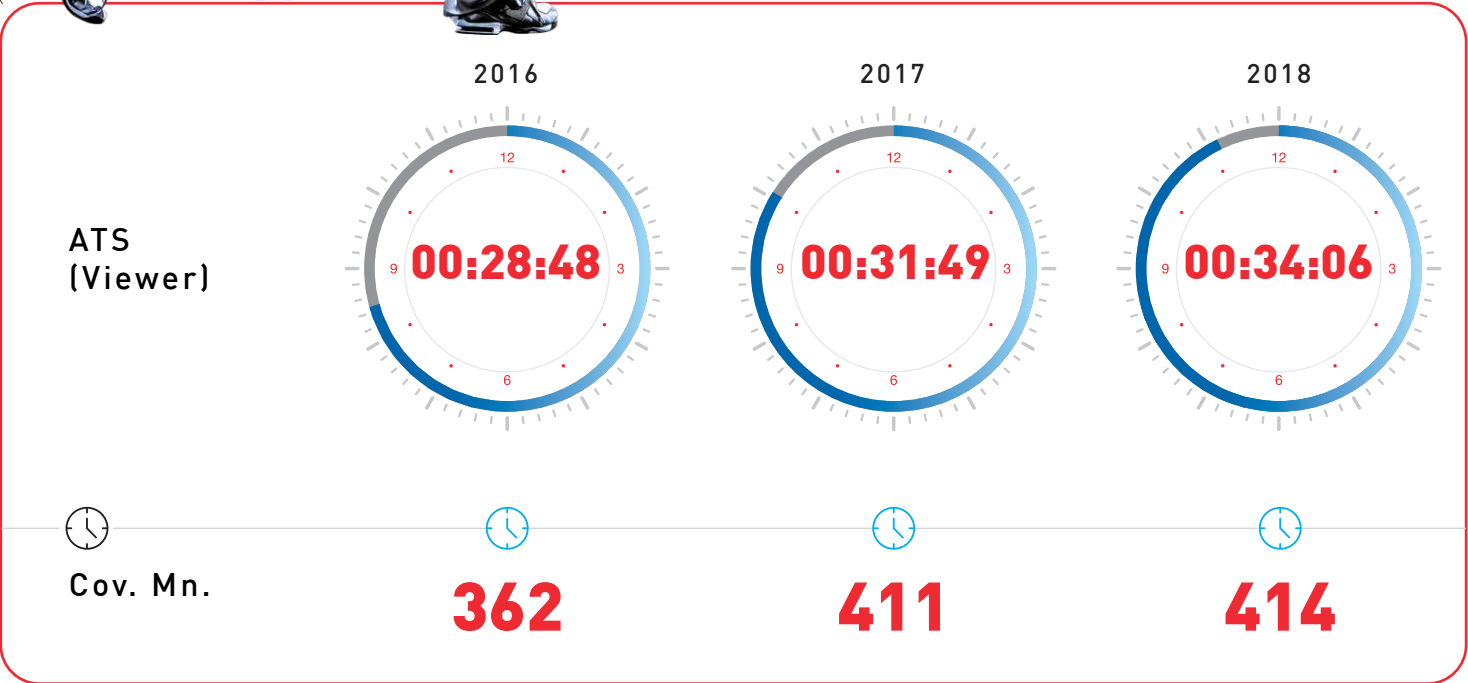


# THE IPL PHENOMENON

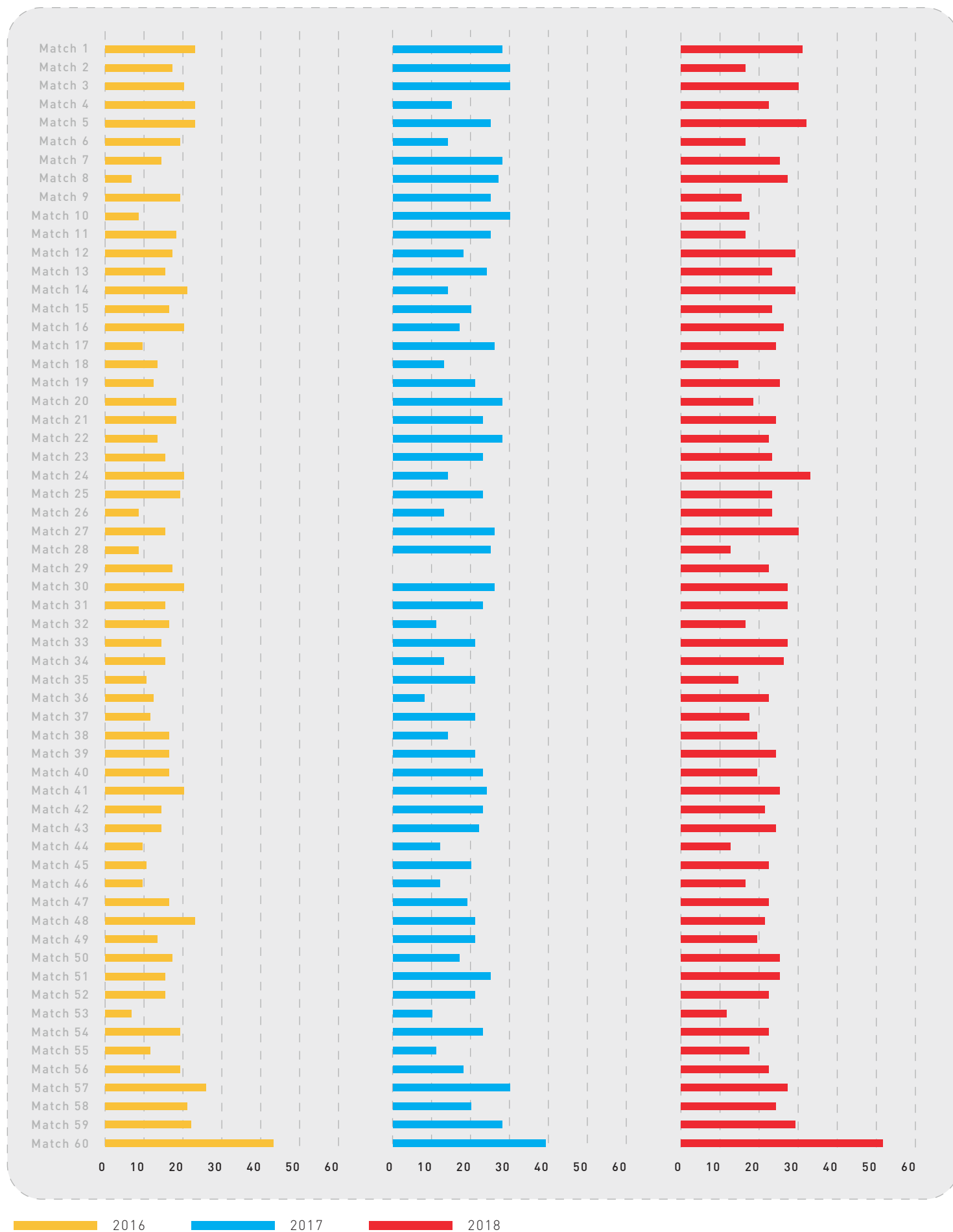
Growing over the years in all parameters



IPL is a mainstay in the regular Indian home and dominates sports viewership in the weeks its on air. The homegrown league in its 11th edition dominated the annual cricket viewership at 40% viewership share.



## IPL Viewership – At A Glance



Viewership in Mn Impressions, India, 2+

## 2016

Match #	Description	Venue	2016
60	F SRH Vs RCB	Bengaluru	45
57	QL GL Vs RCB	Bengaluru	27
4	MI Vs RPS	Mumbai	24
5	RCB Vs SRH	Bengaluru	24
1	KKR Vs MI	Kolkata	24
48	KKR Vs RCB	Kolkata	24
59	QL GL Vs SRH	Delhi	23
58	EL SRH Vs KKR	Delhi	22
14	RCB Vs MI	Mumbai	22
24	KKR Vs MI	Mumbai	21

## 2017

Match #	Description	Venue	2017
60	F MI Vs RPS	Hyderabad	39
2	MI Vs RPS	Pune	30
3	GL Vs KKR	Rajkot	30
57	QL RPS Vs MI	Mumbai	30
10	SRH Vs MI	Mumbai	30
20	RCB Vs GL	Rajkot	28
1	SRH Vs RCB	Hyderabad	28
22	KP Vs MI	Indore	28
7	KKR Vs MI	Mumbai	28
59	QL KKR Vs MI	Bengaluru	28

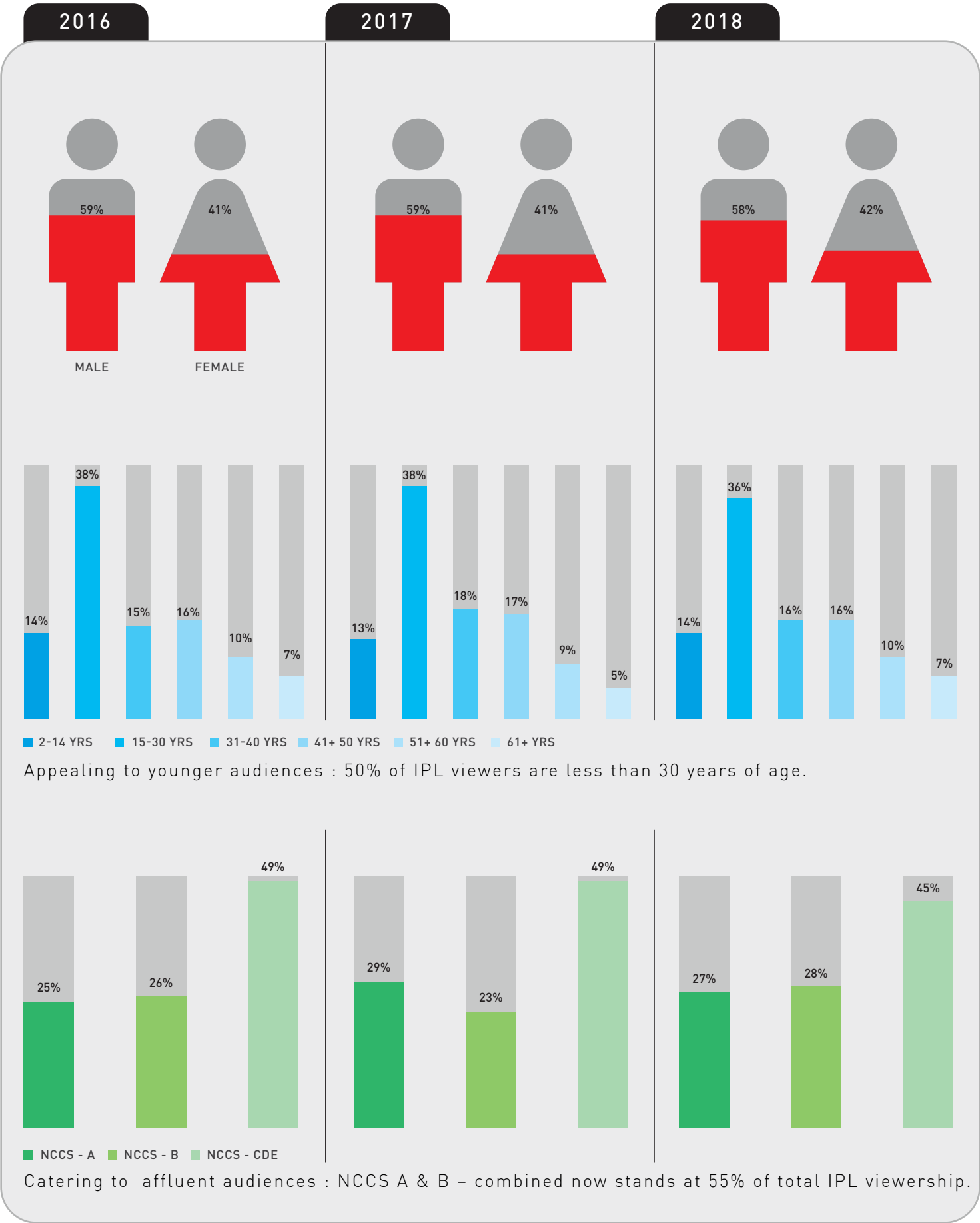
## 2018

Match #	Description	Venue	2018
60	F SRH/CSK	Mumbai	53
24	RCB/CSK	Bengaluru	34
5	KKR/CSK	Chennai	33
1	MI Vs CSK	Mumbai	32
27	CSK Vs MI	Pune	31
3	RCB Vs KKR	Kolkata	31
59	QL SRH Vs KKR	Kolkata	30
12	KP Vs CSK	Mohali	30
14	MI Vs RCB	Mumbai	30
57	QL SRH Vs CSK	Mumbai	28

Viewership in Mn Impressions, India, 2+



# Deconstructing The IPL Viewer



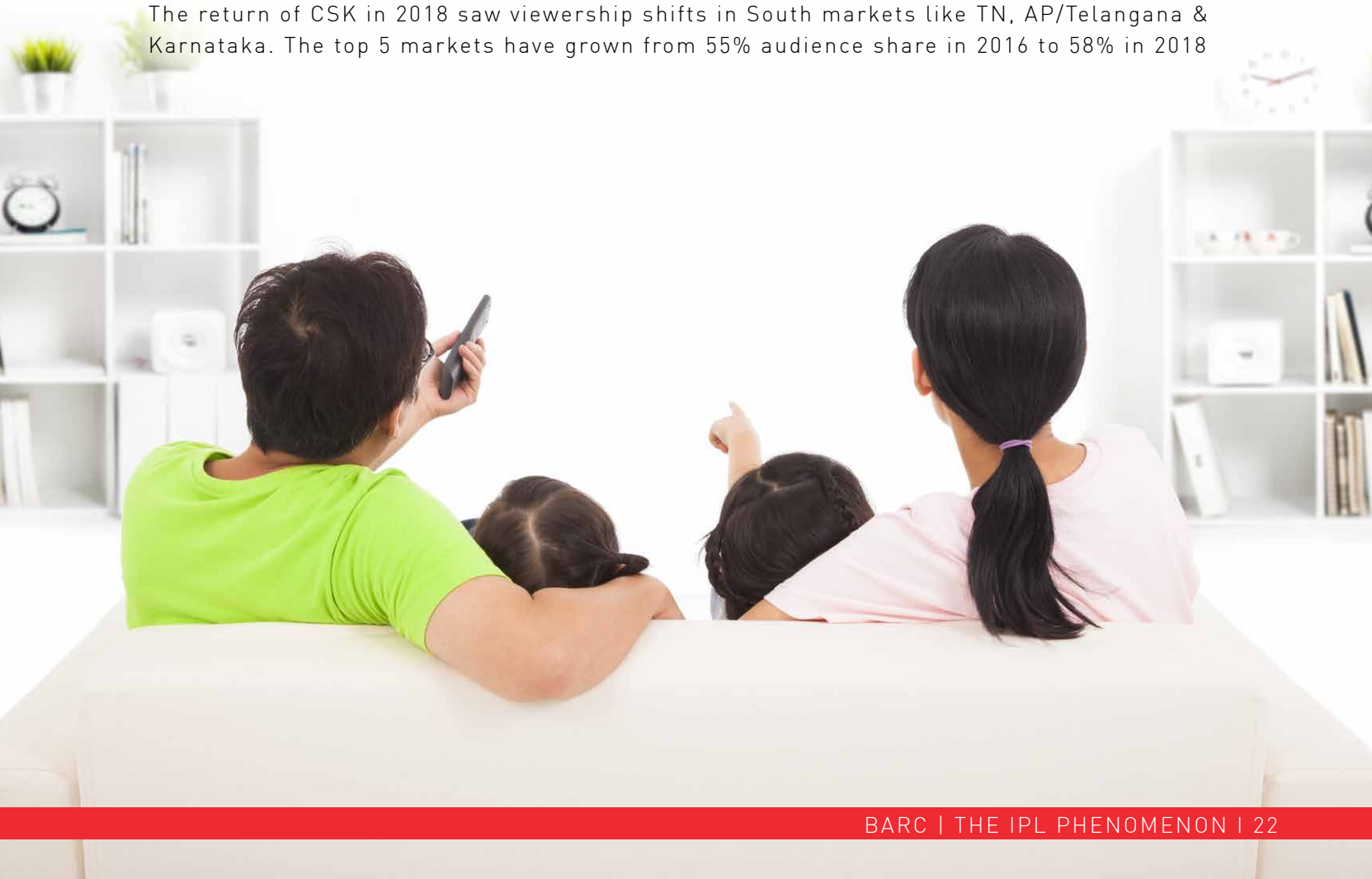
Share of Viewership, India 2+



Regions	2016	2017	2018
AP / Telangana	10%	10%	11%
Assam / North East / Sikkim	2%	2%	3%
Bihar/Jharkhand	4%	3%	3%
Delhi	4%	4%	4%
Guj / D&D / DNH	9%	9%	9%
Karnataka	10%	9%	9%
Kerala	4%	3%	3%
Mah / Goa	19%	21%	19%
MP/Chhattisgarh	5%	7%	5%
Odisha	3%	2%	3%
Pun / Har / Cha / HP / J&K	8%	5%	5%
Rajasthan	4%	4%	3%
TN/Pondicherry	5%	6%	8%
UP/Uttarakhand	7%	6%	5%
West Bengal	6%	8%	9%

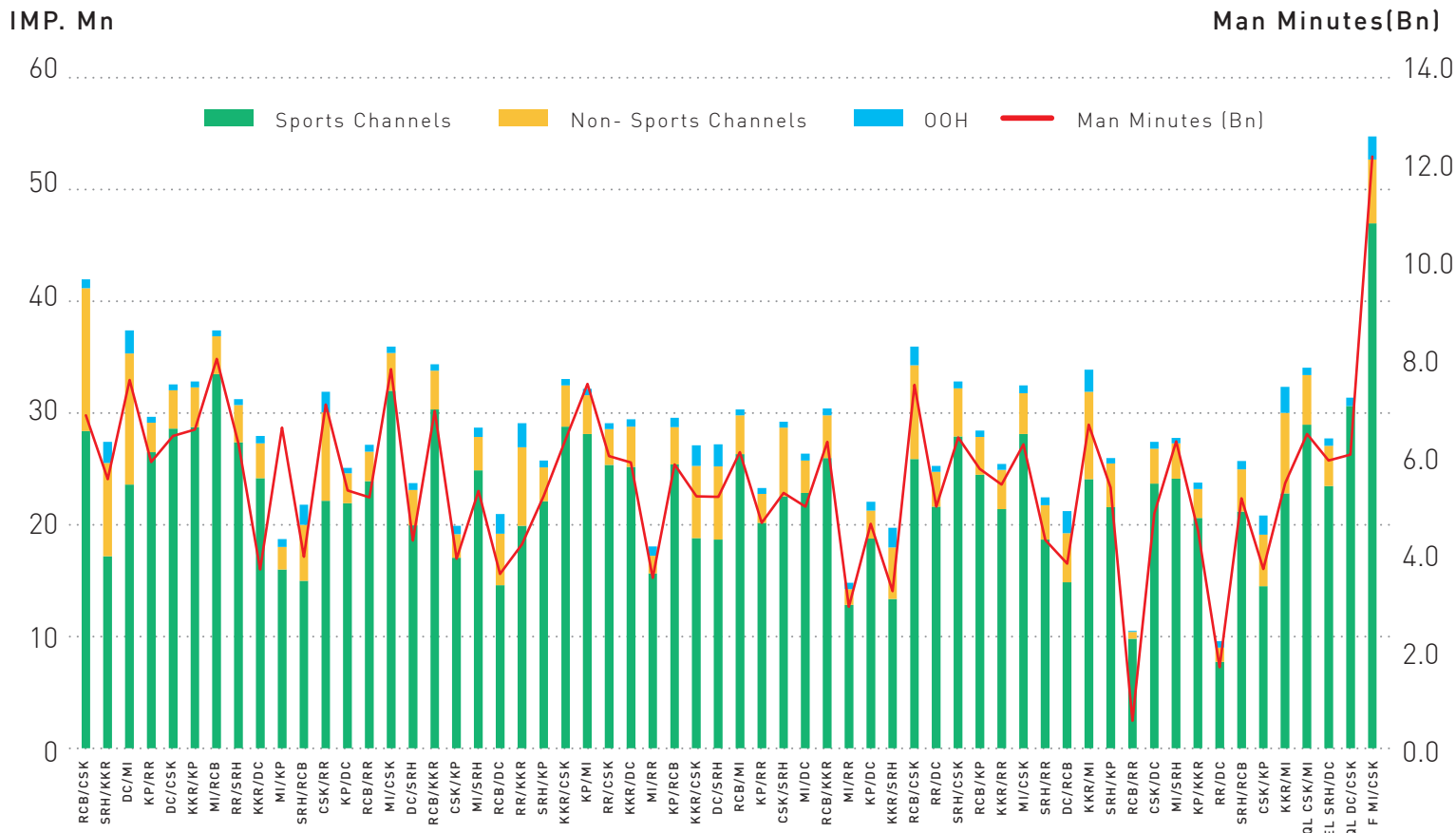
Share of Viewership

The return of CSK in 2018 saw viewership shifts in South markets like TN, AP/Telangana & Karnataka. The top 5 markets have grown from 55% audience share in 2016 to 58% in 2018



Sneak Peak : IPL-12

March 23<sup>rd</sup> – 12<sup>th</sup> May



Contribution of regional languages has increased

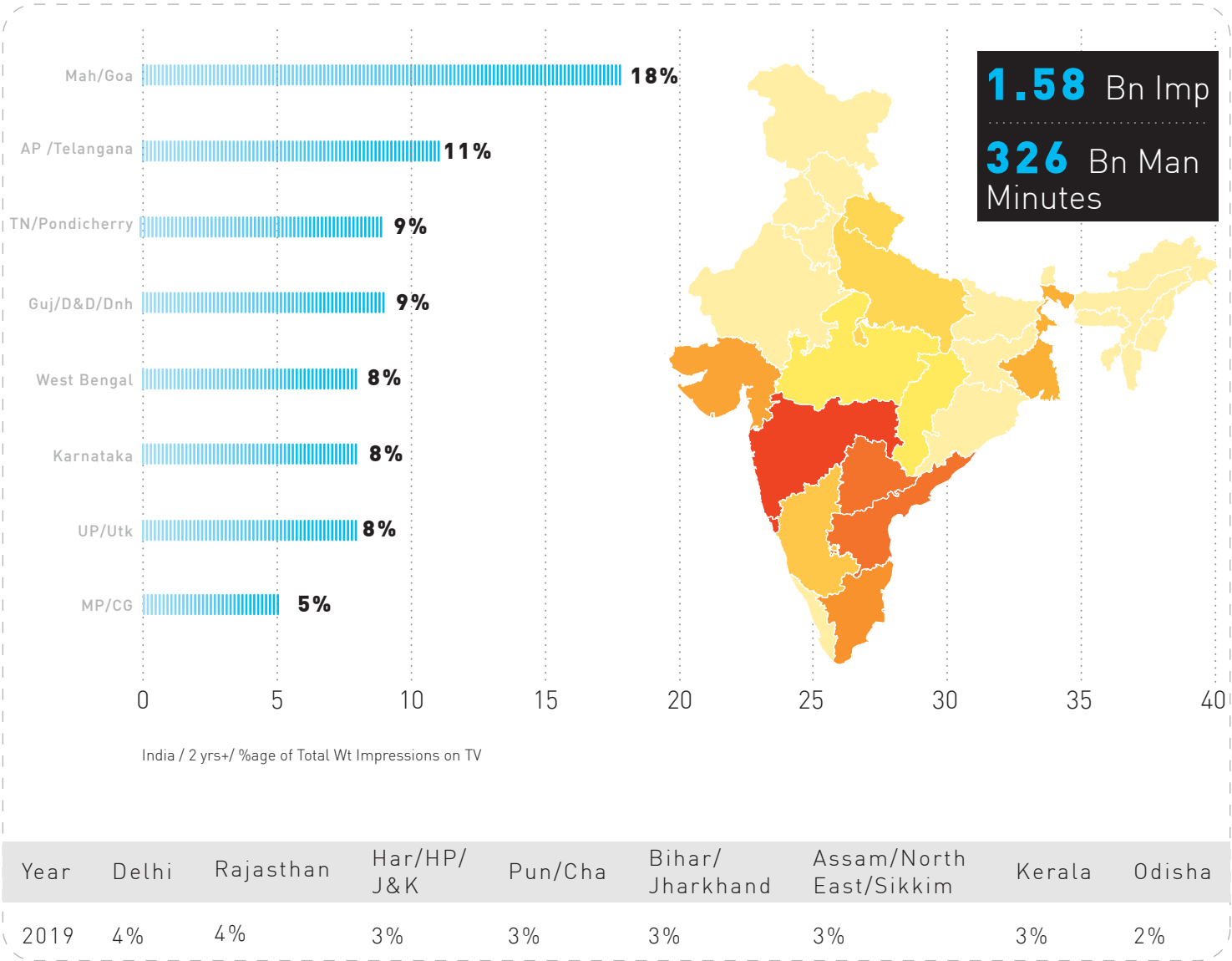
Hindi is the biggest gainer among Non-English languages

Languages	IPL-11	IPL-12
Hindi	54.8%	58.2%
English	22.6%	19.0%
Telugu	6.9%	8.4%
Tamil	6.5%	7.4%
Kannada	4.6%	2.7%
Bengali	4.5%	3.8%
Marathi	0.1%	0.3%
Malayalam	0.1%	0.2%

India / 2 yrs+ / %age of Total Impressions



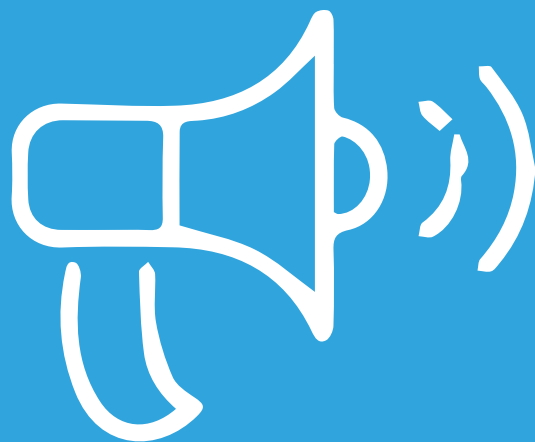
8 regions constitute 75% of IPL viewership this year



Channels in IPL-12:

Asianet Plus, Hungama(v), Star Suvarna, STAR Suvarna HD, Jalsha Movies, Jalsha Movies HD, Star Maa Movies, STAR Maa Movies HD, STAR Gold HD,STAR Gold, STAR Pravah, STAR Sports 1,STAR Sports 1 Tamil, STAR Sports 1 Kannada, STAR Sports 1 Telugu, STAR Sports 1 Bangla, STAR Sports 2(v), STAR Sports 1 Hindi, STAR Sports 1 HD,STAR Sports 2 HD(v), STAR Sports 1 HD Hindi, STAR Sports Select 1 HD, STAR Sports Select 1 SD, STAR Vijay Super

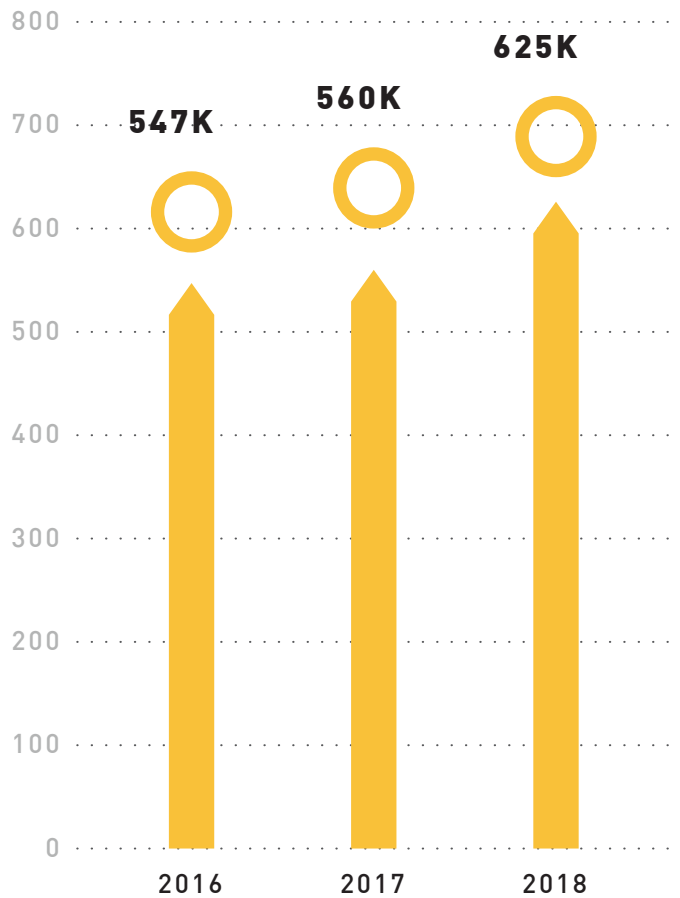
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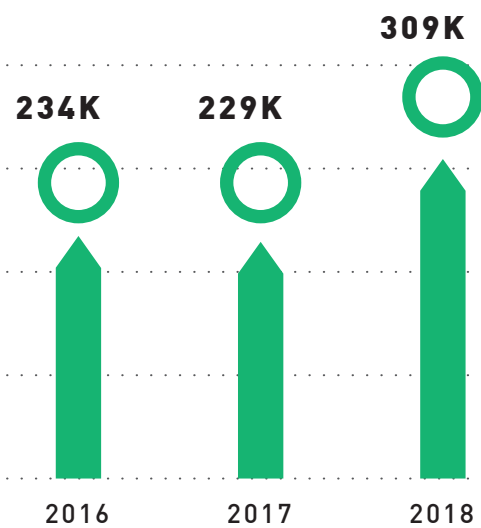
# RISE IN QUANTUM OF ADVERTISING

14% growth in ads across all cricket content from 2016 to 2018

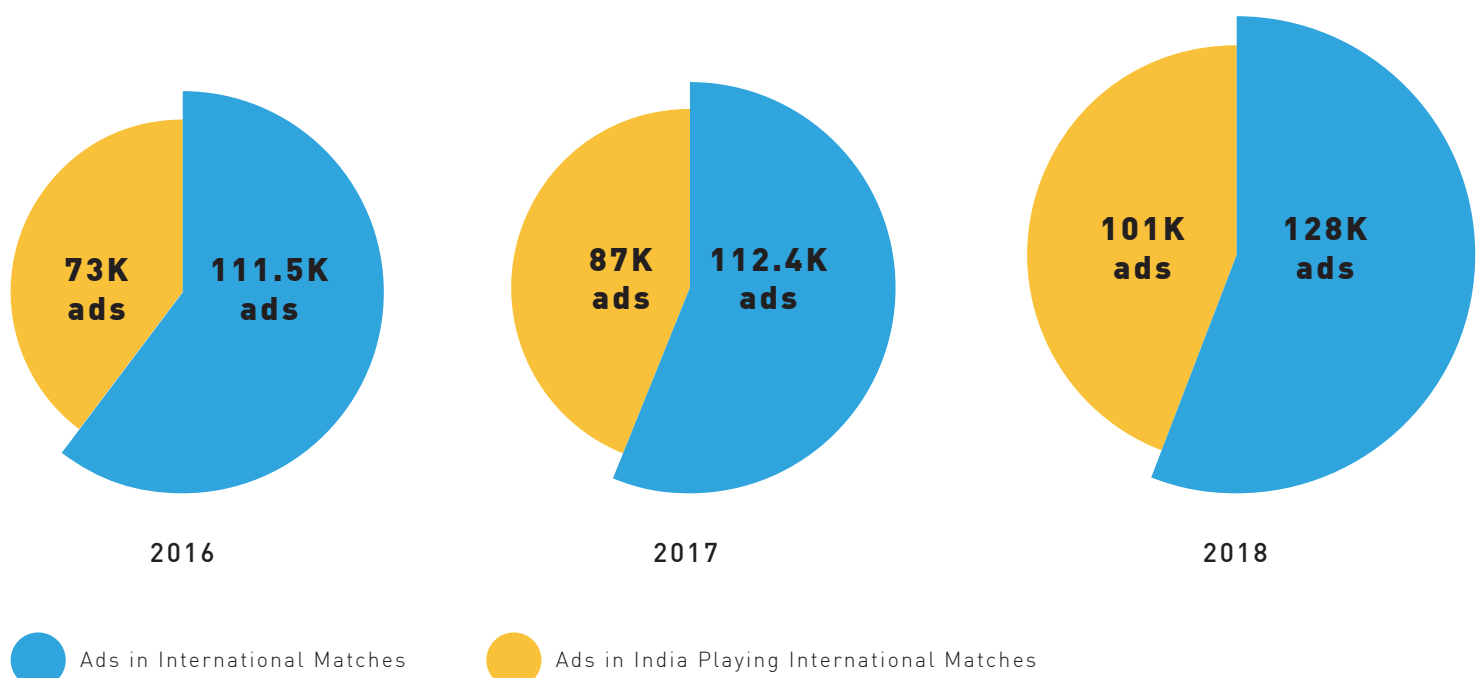
# Ad In 000s



Faster Rate of growth on Live cricket



Ads in India Matches grew at 38% from 2016 to 2018





## Advertising on International Cricket

### 2016

Top 20 Categories	(#Ads)
Cellular Phones-Smart Phones	21731
Perfumes/Deodorant	14612
Is-B2C & Online Shopping	7196
Is-General	6451
Auto-Tyres	4779
Suitings	3471
Shaving Foam	3462
Auto-Cars/Jeeps	3178
Cellular Phone Service	2997
Pan Masala /Zarda /Gutkha	2686
MPSB-Multi Product Single Brand	2595
Shaving System/Razor	2197
Water Purifiers/Filters	2080
Paints	2031
Fast Food Outlets	2017
Rubs & Balms	1778
Consumer Durables/Home Appliances	1574
IS-Travel & Tourism	1562
Lighting Products	1473
Auto-Two Wheelers	1437
<b>Total Ads In The Year</b>	<b>111541</b>

### 2017

Top 20 Categories	(#Ads)
Cellular Phones-Smart Phones	17849
Perfumes/Deodorant	11476
Auto-Cars/Jeeps	7595
Cellular Phone Service	5069
Ecom-Financial Services	4441
Pan Masala /Zarda /Gutkha	3790
Auto-Tyres	3285
Suitings	3181
Fast Food Outlets	2359
Ecom-Other Services	2351
MPSB-Multi Product Single Brand	2284
Ecom-Online Shopping	2193
Water Purifiers/Filters	1947
Auto-Two Wheelers	1836
Televisions	1784
EDUC-Ecom-Education	1654
Paints	1634
Ecom-Travel & Tourism	1626
Chocolates	1602
Is-B2C & Online Shopping	1354
<b>Total Ads In The Year</b>	<b>112444</b>

### 2018

Top 20 Categories	(#Ads)
Perfumes/Deodorant	18391
Cellular Phones-Smart Phones	8051
Ecom-Wallets	6971
EDUC-Ecom-Education	6157
Auto-Tyres	5740
Ecom-Food/Grocery	5460
MPSB-Multi Product Single Brand	5269
Ecom-Online Shopping	5227
Auto-Cars/Jeeps	5189
Cellular Phone Service	4850
Water Purifiers/Filters	3763
Ecom-Financial Services	3073
Ecom-Auto Products & Services	2821
Shaving Foam	2723
Suitings	2169
Ecom-Travel & Tourism	2137
Auto-Two Wheelers	1937
Ecom-Pharma/Healthcare	1901
Ecom-Media/Entertainment/Social Media	1761
Ecom-Gaming	1487
<b>Total Ads In The Year</b>	<b>128336</b>

14% growth in the number of ads on Live telecast of International matches in 2018 vis-à-vis 2017.



## Advertising on India Playing International Matches

### 2016

Top 20 Categories	(#Ads)
Cellular Phones-Smart Phones	15472
Perfumes/Deodorant	6713
Is-General	4165
Is-B2C & Online Shopping	3922
Auto-Tyres	3714
Auto-Cars/Jeeps	2426
Suitings	2279
MPSB-Multi Product Single Brand	2172
Water Purifiers/Filters	2172
Fast Food Outlets	2017
Cellular Phone Service	2017
Shaving System/Razor	1798
Consumer Durables/Home Appliances	1574
Pan Masala /Zarda /Gutkha	1552
Lighting Products	1473
Paints	1438
Is-Travel & Tourism	1420
Auto-Two Wheelers	1403
Rubs And Balms	1329
Health Stimulant/Ginseng	1228
<b>Total Ads In The Year</b>	<b>73269</b>

Ads in India Matches have witnessed 18% growth & 17% growth in 2017 and 2018 respectively.

e-commerce has emerged as the dominant sector with share of ads going up from 14% in 2016 to 42% in 2018.

Smartphones & telecom ads have decreased; 24% in 2016 to 11% in 2018.



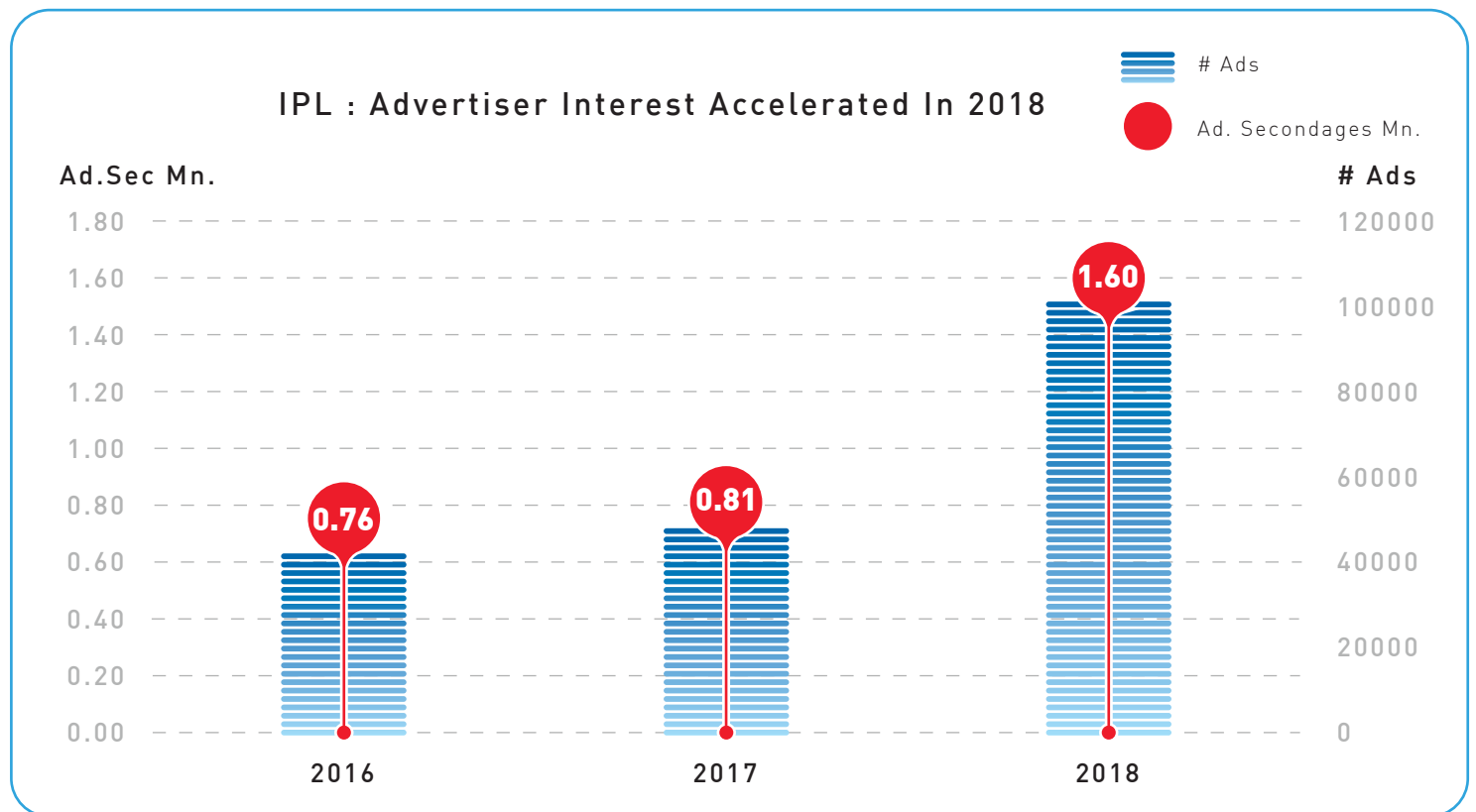
### 2017

Top 20 Categories	(#Ads)
Cellular Phones-Smart Phones	14570
Perfumes/Deodorant	7715
Auto-cars/Jeeps	5086
Cellular Phone Service	4265
Pan Masala /Zarda /Gutkha	3790
Suitings	3181
Auto-Tyres	2417
Ecom-Financial Services	2317
Fast Food Outlets	2148
Ecom-Online Shopping	2041
MPSB-Multi Product Single Brand	1944
Paints	1626
Water Purifiers/Filters	1566
Ecom-Travel & Tourism	1373
Auto-Two Wheelers	1347
Ecom-Other Services	1283
Hosiery	1230
Lighting Products	1220
Fans	1219
Lubricants	1205
<b>Total Ads In The Year</b>	<b>86592</b>

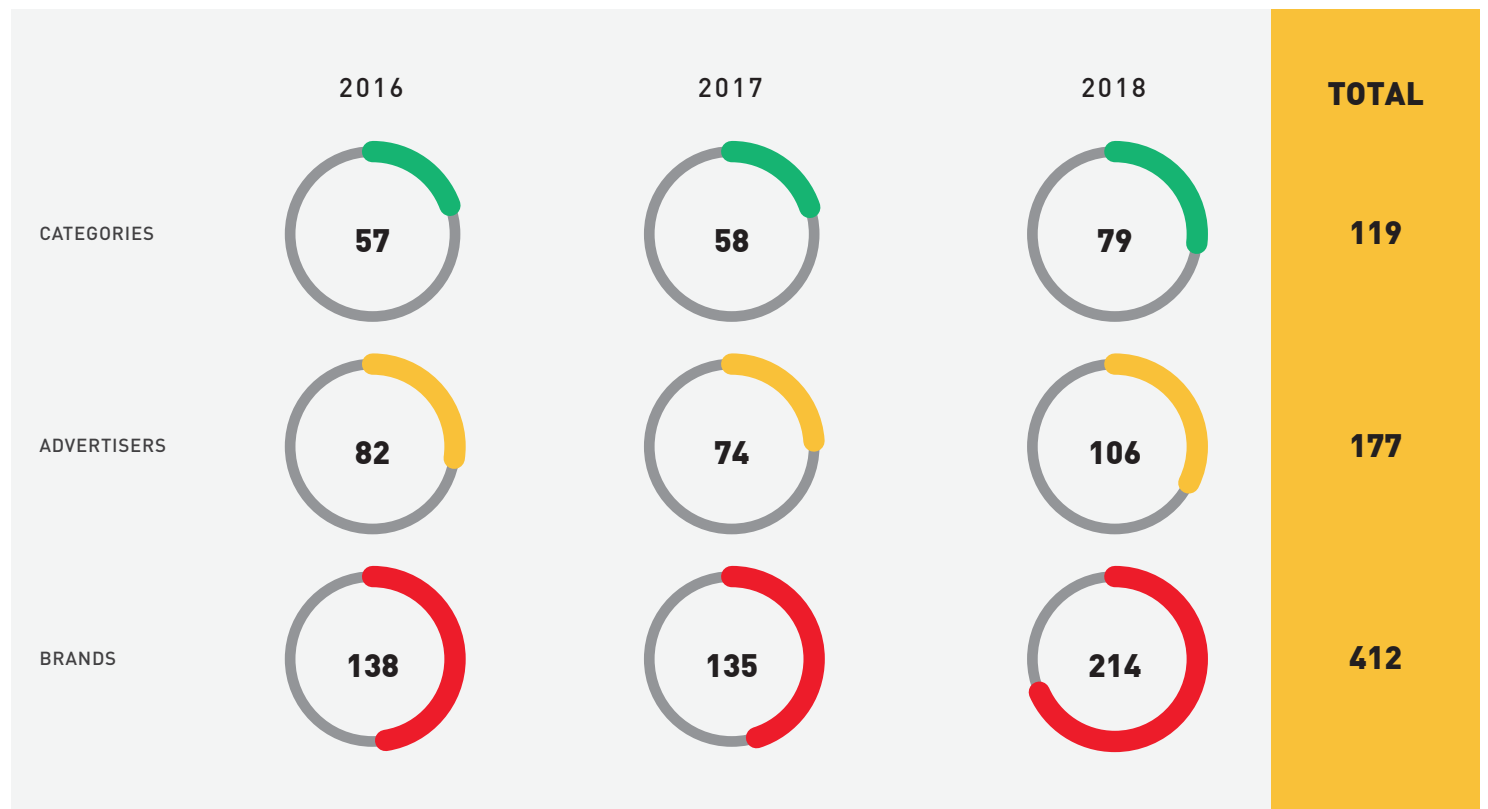
### 2018

Top 20 Categories	(#Ads)
Perfumes/Deodorant	12701
Cellular Phones-Smart Phones	6800
EDUC-Ecom-Education	5727
Ecom-Wallets	5482
Auto-Tyres	5387
Ecom-Food/Grocery	5311
Ecom-Online Shopping	4867
MPSB-Multi Product Single Brand	4570
Auto-Cars/Jeeps	4483
Cellular Phone Service	4453
Water Purifiers/Filters	3413
Ecom-Auto Products & Services	2769
Ecom-Financial Services	2453
Suitings	1690
Auto-Two Wheelers	1655
Fast Food Outlets	1232
Ecom-Other Services	1072
Ecom-Media/Entertainment/Social Media	1043
Digestives	1027
Ecom-Gaming	924
<b>Total Ads In The Year</b>	<b>101207</b>

## Advertising on IPL



## Growth Witnessed Across Categories & Brands



## Advertising on IPL

### 2016

Top 20 Categories	(#Ads)
Cellular Phones-Smart Phones	6843
Is-B2C & Online Shopping	5715
Auto-Cars/Jeeps	2767
Pan Masala /Zarda /Gutkha	2598
Auto-Tyres	2552
Cellular Phone Service	1798
Liquor-Beer	1653
Air Conditioners	1582
Paints	1478
Soft Drink Aerated	1421
Lighting Products	1180
Perfumes/Deodorant	1087
Soft Drink Non Aerated	900
Is-Travel & Tourism	797
Dth Service Providers	777
Water Purifiers/Filters	752
Fans	604
Biscuits	556
Auto-Two Wheelers	531
Readymade Garments	523
<b>Total Ads In The Year</b>	<b>42081</b>

Smartphones & telecom dominate with 24% of ads in 2018.

Share of e-commerce ads increase; 7% in 2016 to 17% in 2018. 2017 however, saw a peak with 29% of ads from e-commerce.

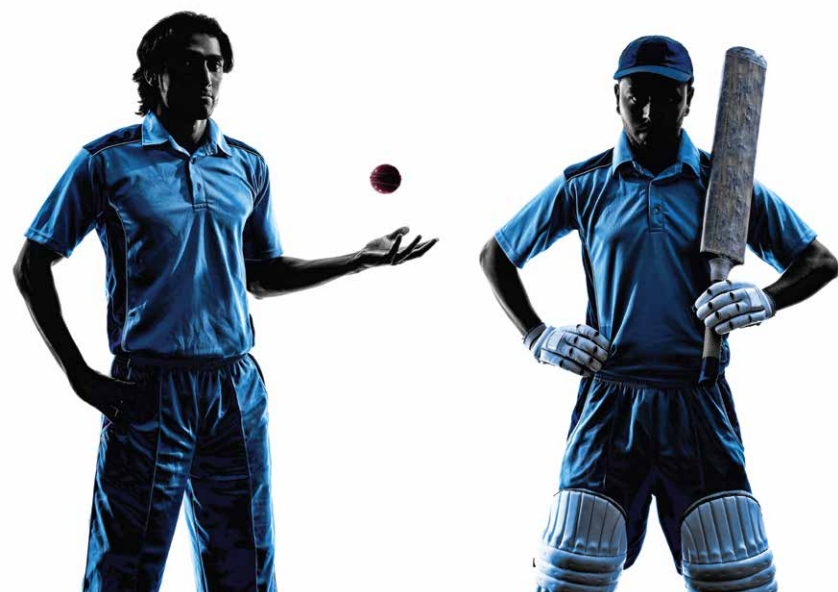
Auto sector ads move southwards : from 14% in 2016 to 8% in 2018.

### 2017

Top 20 Categories	(#Ads)
Cellular Phones-Smart Phones	10728
Cellular Phone Service	4068
Air Conditioners	3085
Auto-Two Wheelers	2618
Auto-Cars/Jeeps	2152
Auto-Tyres	1899
Wires & Cables	1746
Fans	1651
Biscuits	1587
Ecom-Online Shopping	1538
Pan Masala /Zarda /Gutkha	1460
Soft Drink Non Aerated	1444
Hosiery	1225
Paints	1192
Ecom-Travel & Tourism	1156
Banking-Retail Banking	887
Retail Outlets-Departmental Stores	682
Corporate-Sports	546
Tiles & Floorings	530
Water Purifiers/Filters	523
<b>Total Ads In The Year</b>	<b>47541</b>

### 2018

Top 20 Categories	(#Ads)
Cellular Phones-Smart Phones	13826
Cellular Phone Service	8424
Pan Masala/Zarda/Gutkha	5997
Paints	5210
Soft Drink Non Aerated	3724
Air Conditioners	3665
Auto-Sars/Jeeps	3308
MPSB-Multi Product Single Brand	3307
Auto-Tyres	3230
Biscuits	3217
Soft Drink Aerated	3120
Water Purifiers/Filters	2637
Fans	2401
Ecom-Travel & Tourism	2395
Cellular Phones	2187
Ecom-Food/Grocery	2147
Auto-Two Wheelers	1750
EDUC-Ecom-Education	1588
Ecom-Financial Services	1529
Retail Outlets-Departmental Stores	1516
<b>Total Ads In The Year</b>	<b>101242</b>



## Advertising on IPL -12

2019

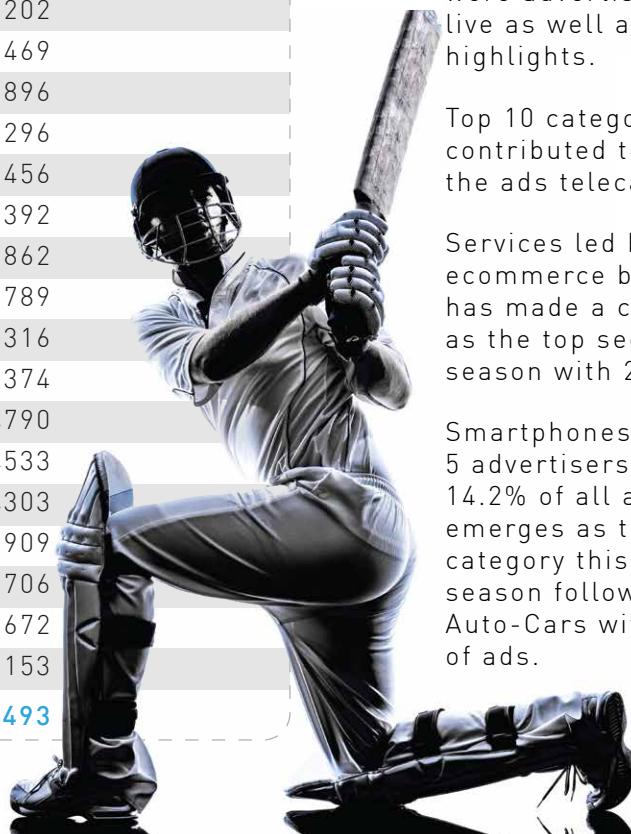
Top 20 Categories	(#Ads)
Cellular Phones-Smart Phones	30253
Auto-Cars	12026
Pan Masala /Zarda /Gutkha	10452
Ecom-Gaming	10202
Paints	9469
Ecom-Wallets	8896
Soft Drink Non Aerated	8296
EDUC-Ecom-Education	7456
Perfumes/Deodorant	7392
Ecom-Food/Grocery	6862
Ecom-Media/Entertainment/Social Media	6789
Air Conditioners	6316
Soft Drink Aerated	5374
Auto-Tyres	4790
Ecom-Travel & Tourism	4533
Refrigerators	4303
Cellular Phone Service	3909
Fans	3706
Fast Food Outlets	3672
Chocolates	3153
<b>Total Ads on IPL-12</b>	<b>212493</b>

246 brands from 95 categories were advertised in this period. 158 brands were advertised on live as well as match highlights.

Top 10 categories contributed to 52% of the ads telecast.

Services led by ecommerce brands has made a comeback as the top sector this season with 24% ads.

Smartphones ads by 5 advertisers clocked 14.2% of all ads and emerges as the top category this IPL season followed by Auto-Cars with 5.7% of ads.



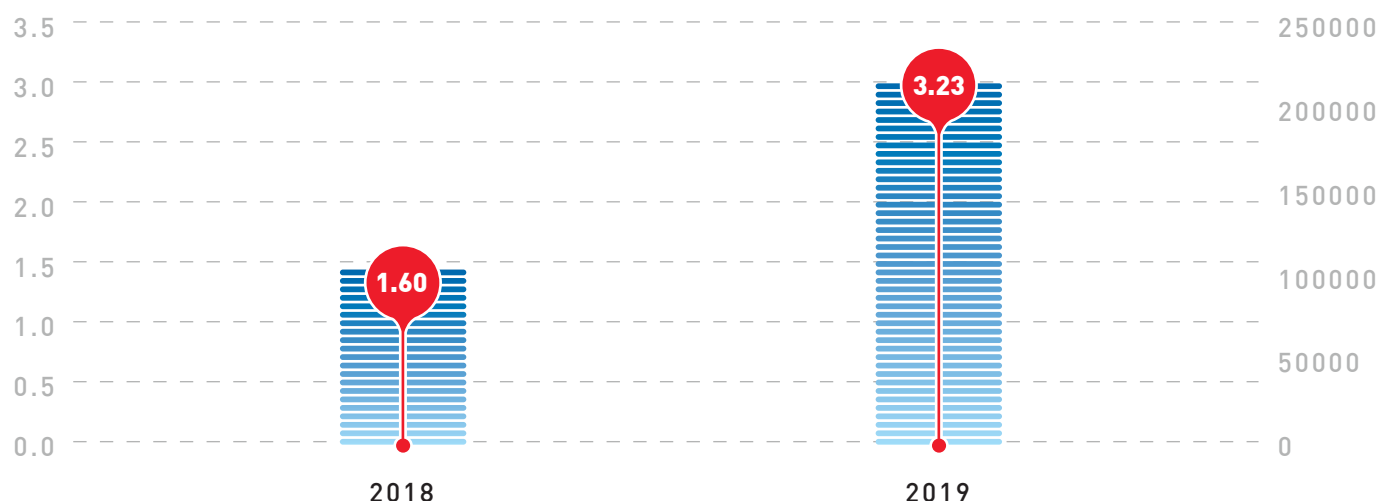
### Ad volumes grew over 100% in IPL-12 vis-à-vis IPL -11

Ad.Sec Mn.

# Ads

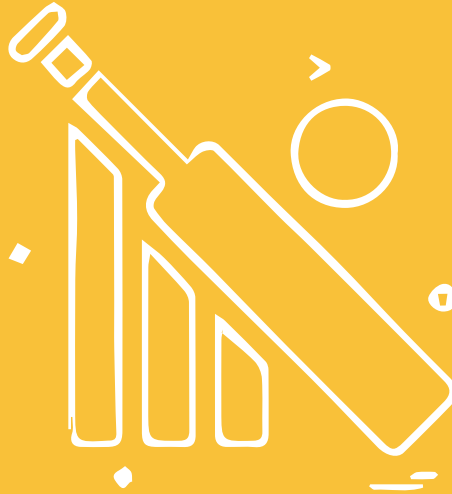
Ad. Secondages Mn.

# Ads



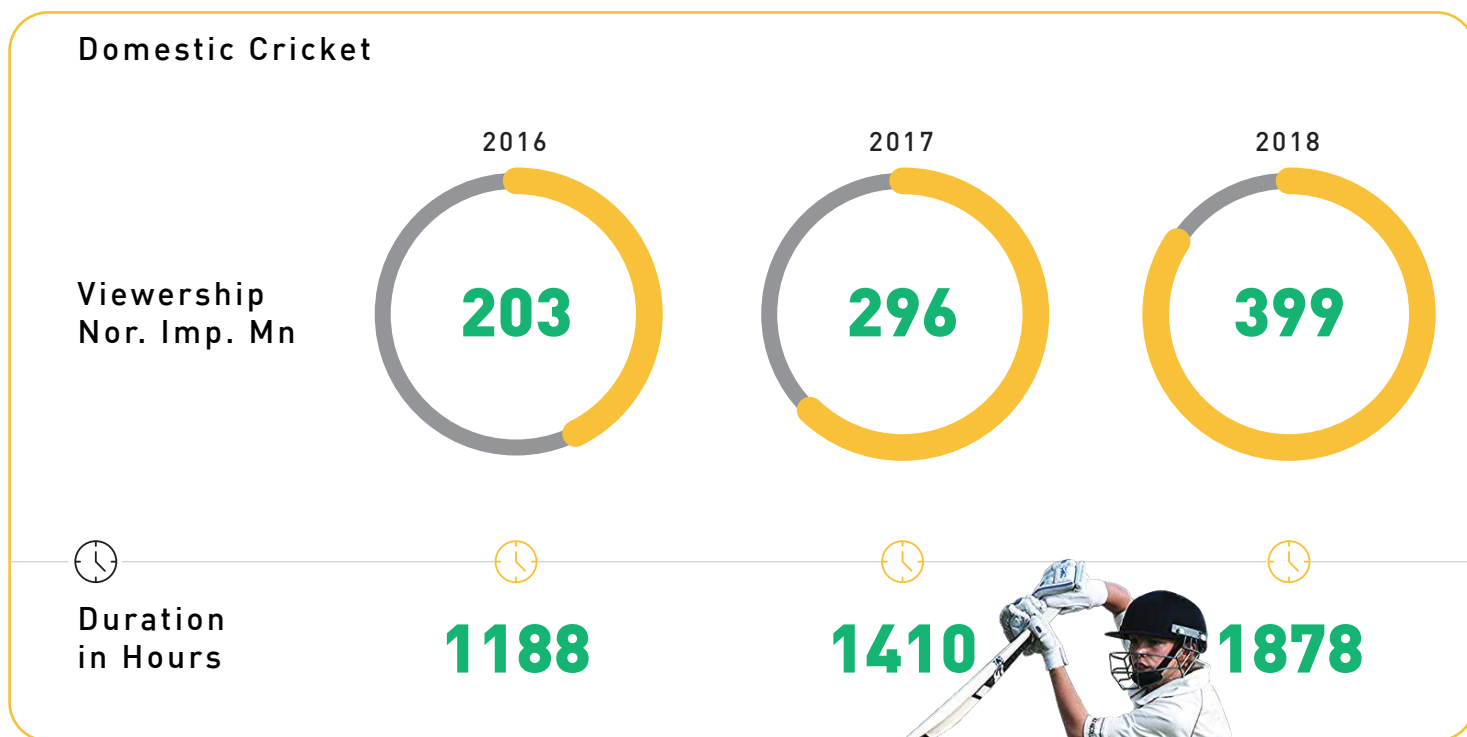


**#7**

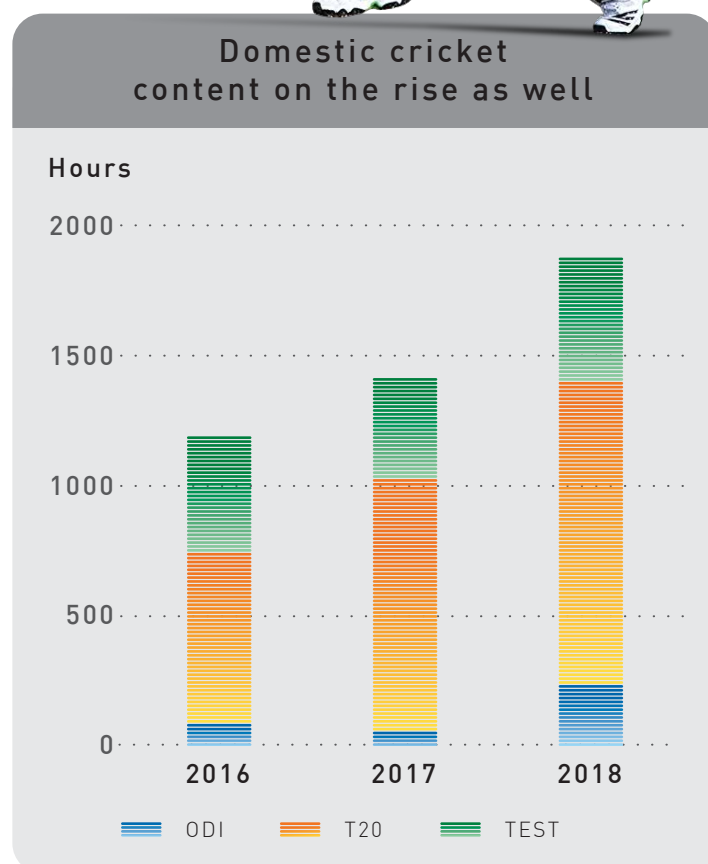
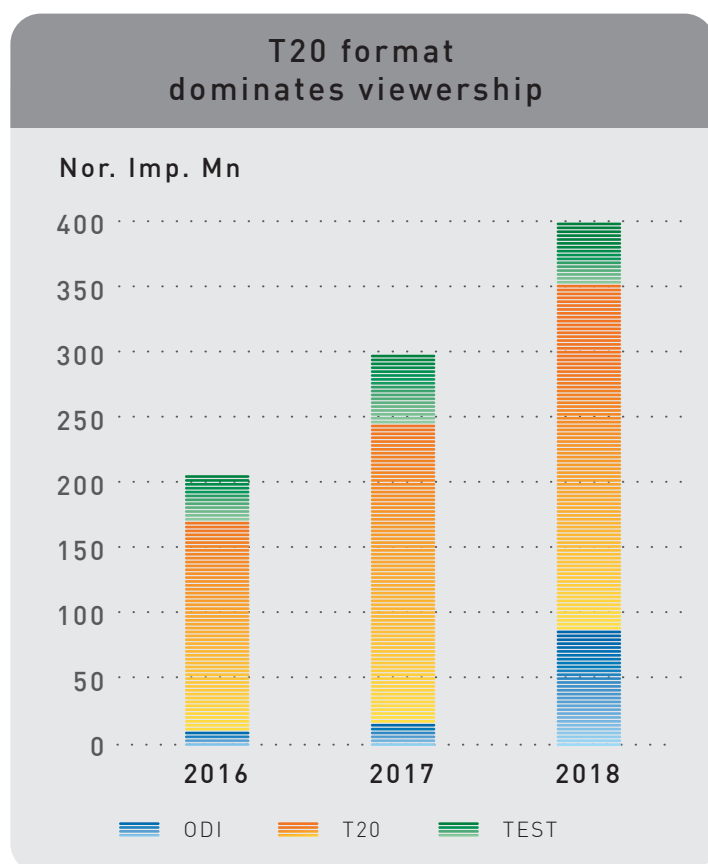


# OTHER EMERGING COHORTS

## Domestic Cricket growing on the back of T20 matches



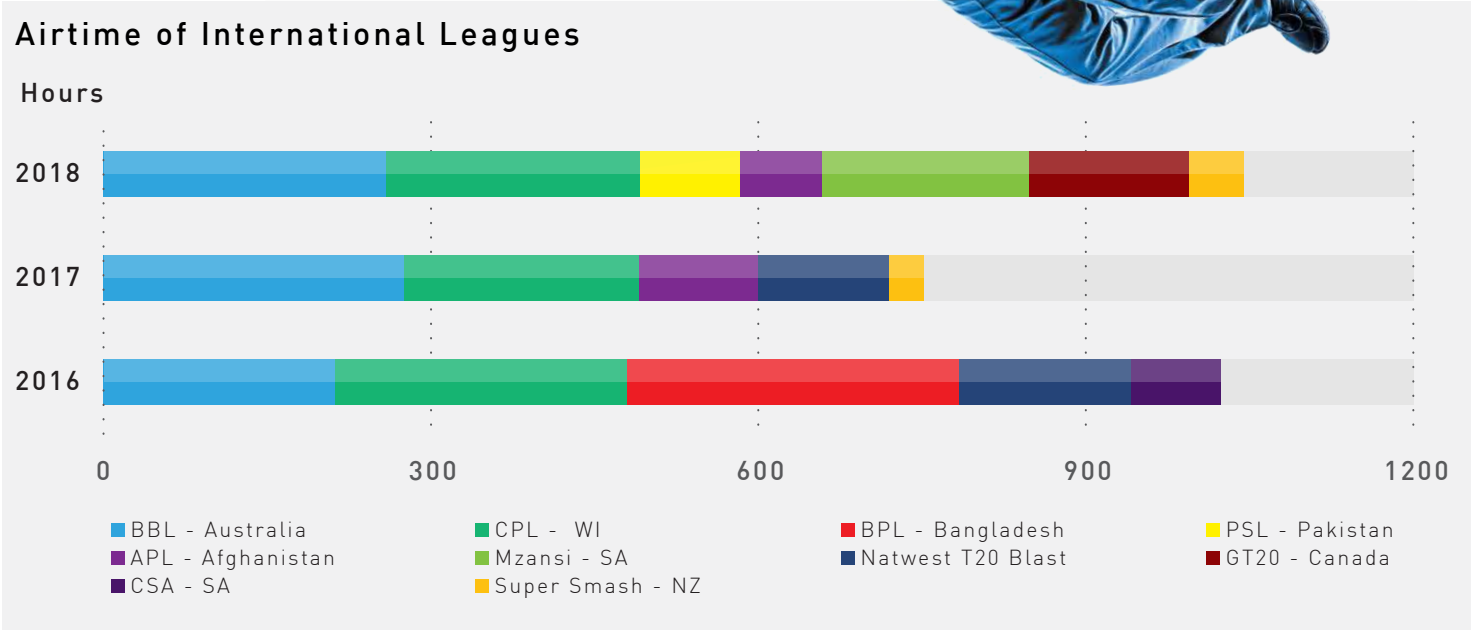
Prestigious legacy tournaments like Ranji Trophy, Duleep Trophy etc hold their ground in the midst of the more popular T20 format.



Other T20 Leagues



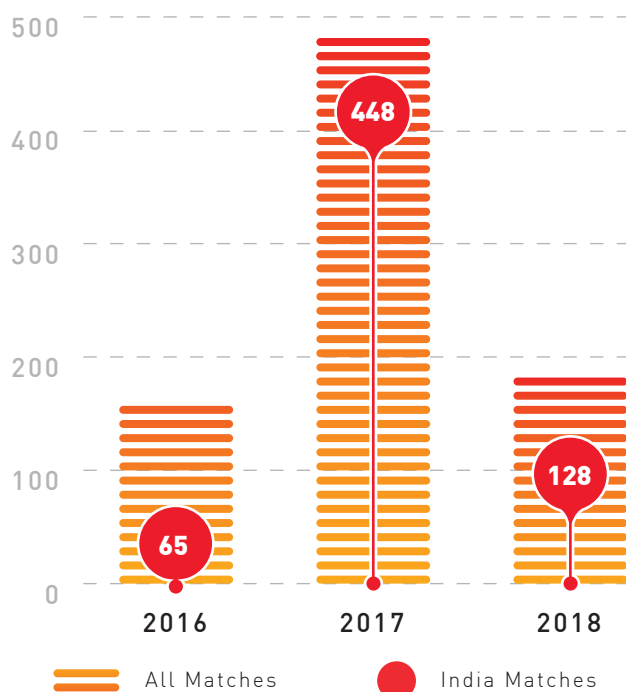
Consistent on-air presence by leagues begets viewership. The Big Bash League and Caribbean Premier League are examples of this phenomenon



## Women's Cricket – scoring on yield

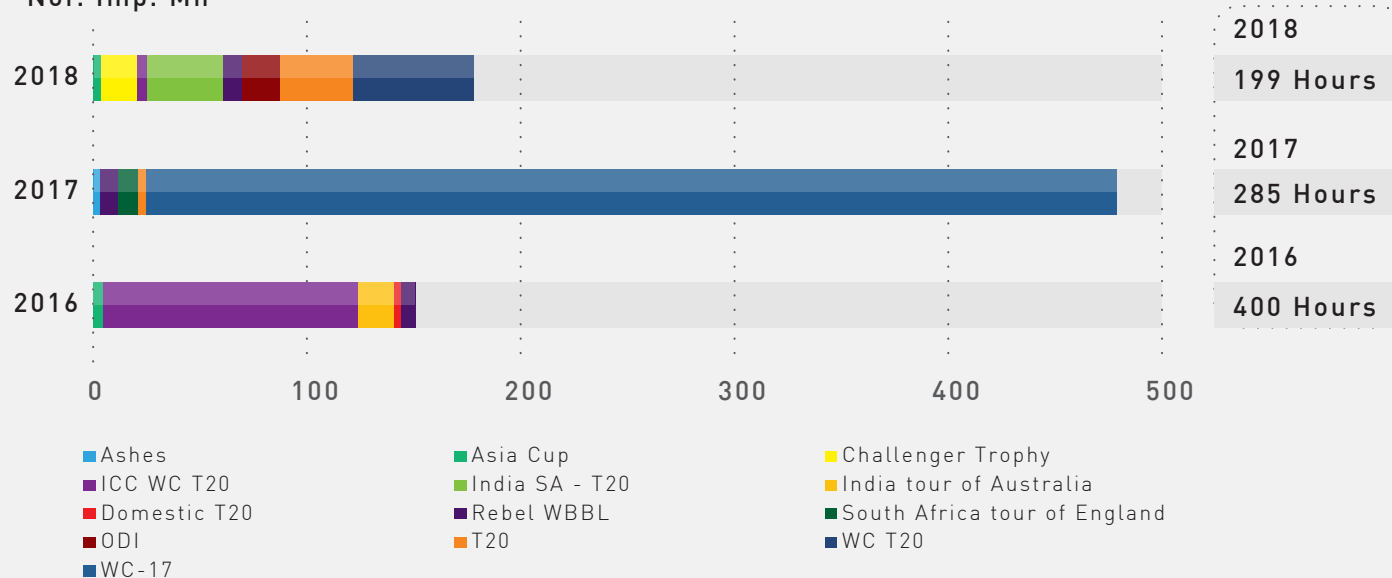
### Women's Cricket driven by Indian matches

Nor. Imp. Mn



### World Cups in 2016 and 2017 witnessed high viewership for Women's Cricket

Nor. Imp. Mn



# # 8



# SUMMARY

## CRICKET DOMINATES

Cricket continues to dominate sports in India. The sport clocked 12.3 Bn impressions (normalized at 30 mins) in 2018 in spite of absence of international tournaments in the year.

## THE CROWD PULLERS

International tournaments are crowd pullers and garner high viewership across ODIs and T20.

## WOMEN CRICKET GAINS MOMENTUM

Women viewership albeit lower than their counterparts, display signs of growth year-on-year.

## GROWTH OF WOMEN VIEWERS

Women viewers are to the tune of 48% of all cricket viewers; up from 295 Mn in 2016 to 342 Mn in 2018.

## CRICKET ON NON-SPORTS CHANNELS

The trend of non-sports channels carrying cricket content continues. However, viewership ROI is muted in 2018.

## IPL RIDES HIGH ON REGIONAL VIEWERSHIP

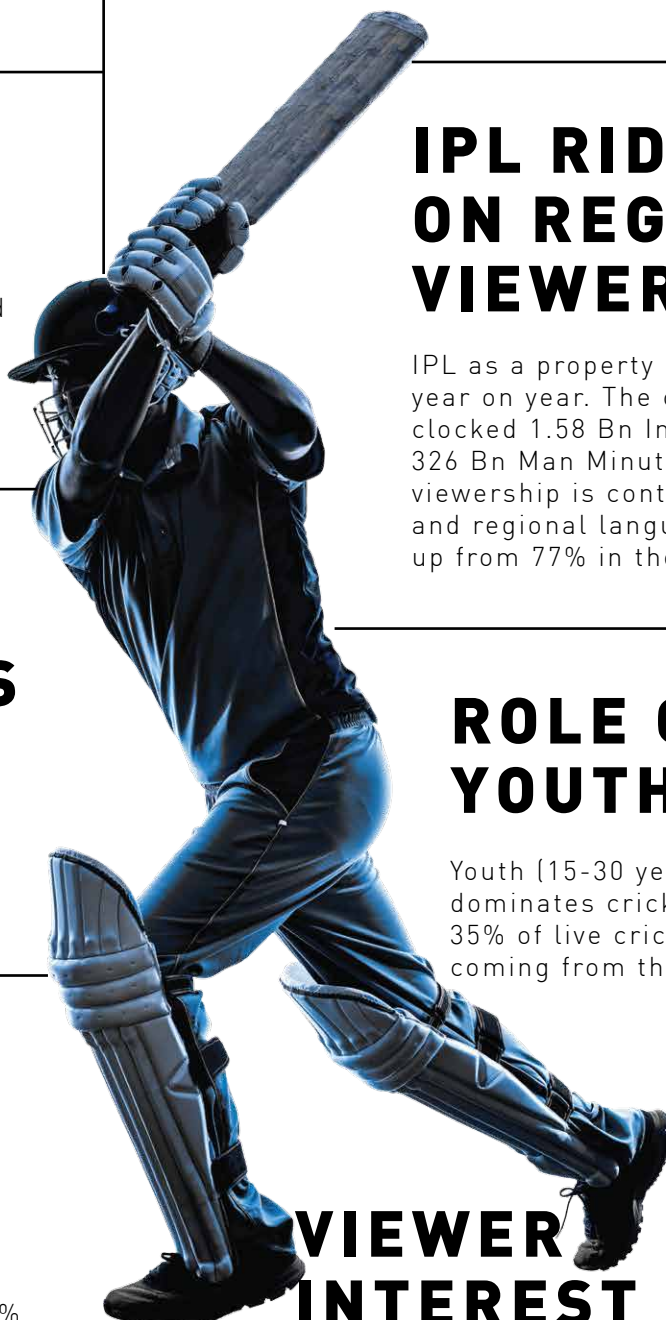
IPL as a property continues to grow year on year. The current season clocked 1.58 Bn Impressions and 326 Bn Man Minutes. 81% of viewership is contributed by Hindi and regional language broadcast - up from 77% in the previous season.

## ROLE OF YOUTH

Youth (15-30 year olds) still dominates cricket viewership with 35% of live cricket viewership coming from this audience.

## VIEWER INTEREST RISES FOR OTHER FORMATS

Cricket hungry Indian viewers are lapping up relatively newer cricket content like women's cricket, Domestic T20, International T20 leagues etc.









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