

# Rise of Indian Sports Leagues



## Why this story is without Sixes and Fours

The sports viewership in India has been mainly restricted to Cricket for the longest time. While Cricket still dominates the Indian sports viewership pie, the contribution of other sports is now over 20% in 2016. Interest in other sports has been on the rise among Indian viewers partly due to global events like Olympics and introduction of domestic leagues in India.



Through this Newsletter, we aim to demystify the new entrant on the viewership block – sport properties beyond cricket.

We have looked at the two major global events in 2016 – Rio Olympics & Kabaddi World Cup, in addition to all Indian origin domestic leagues – Pro Kabaddi League, Premier Badminton League, Indian Super League (Football), and Hockey India League.

Established international properties like WWE, EPL, etc. have not been considered since they have a pre-existing viewer base and are therefore an unfair comparison.

**01**

**How Big** are sports other than Cricket on TV?

**02**

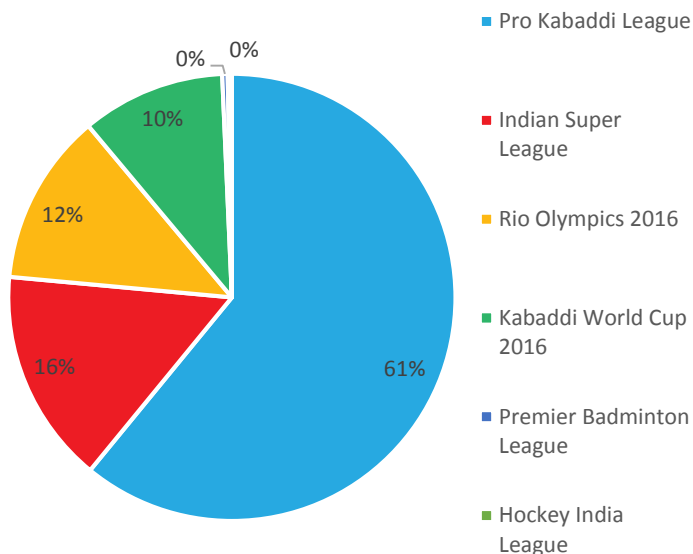
**Who watches** these properties - Audience profile and Markets?

**03**

Taking a closer look at the biggest domestic league - **Pro Kabaddi League**

**Source:** BARC India, BMW Data; Period: Wk01 – Wk52, 2016; Market: All India; TG: Universe; Only Live matches considered for analysis

## What are the popular sports properties?



\* % share of Sum of Normalised Impressions'000

Overall non-cricket properties contribute to 20% of the Live matches viewership. Within this, approx. 80% of the viewership contribution comes from just 6 properties – Pro Kabaddi League, Indian Super League, Rio Olympics 2016, Kabaddi World Cup 2016, Premier Badminton League, and Hockey India League.

Pro Kabaddi League is clearly the most popular property with a share of 61%, followed by Indian Super League at 16%. However, it must be noted that this is in part due to the fact that Pro Kabaddi League has had 2 seasons in 2016 – Season 3 in January-February 2016 & Season 4 in June-July 2016. All other properties have had only one season.

Tournament	Avg. Normalised Impressions'000
Pro Kabaddi League	1487
Kabaddi World Cup 2016	970
Indian Super League	249
Premier Badminton League	233
Rio Olympics 2016	157
Hockey India League	88

Even if we look at the average viewership for each property, Pro Kabaddi League continues to lead. In addition to that, Kabaddi turns out to be the most popular sport with Kabaddi World Cup 2016 overtaking Indian Super League for the second highest viewership spot.

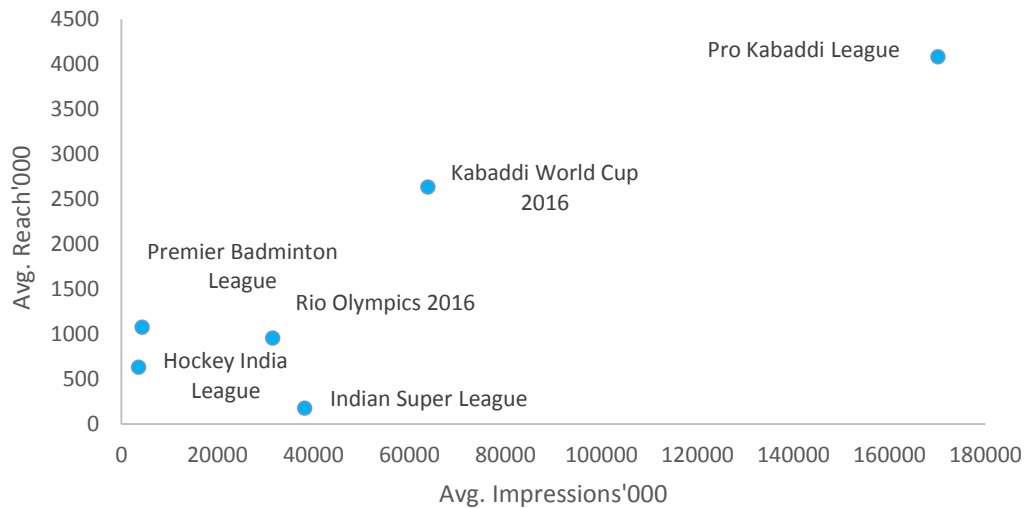
Conversely, Rio Olympics 2016 sees a drop in position when it comes to average viewership.

Hockey India League has the lowest viewership within all these properties.



## Impressions vs. Reach

Traditionally, TV content performance is looked at from the angle of either Reach or Impressions (Ratings). However, looking at Reach vs. Impressions indicate the stickiness of the content. In other words, it answers the question of after spending a minute on a specific content what happens to the viewer? The questions that broadcasters can ask is what is the holding strength of my content?



The dominance of Kabaddi extends to the Reach of the properties as well. Kabaddi as a sport has the highest Impressions as well as Reach, with Pro Kabaddi League leading followed by Kabaddi World Cup 2016.

What is interesting is that Indian Super League, which has the highest Impressions after Kabaddi, has the lowest Reach among all properties. This means that while the viewer base of the property is low, it has extremely high stickiness amongst its viewers.

Conversely, Premier Badminton League and Hockey India League have the lowest Impressions to Reach ratio. This may, partly, be due to the longer duration of matches as compared to kabaddi or football. However, there is potential for them to increase the stickiness among their viewers.

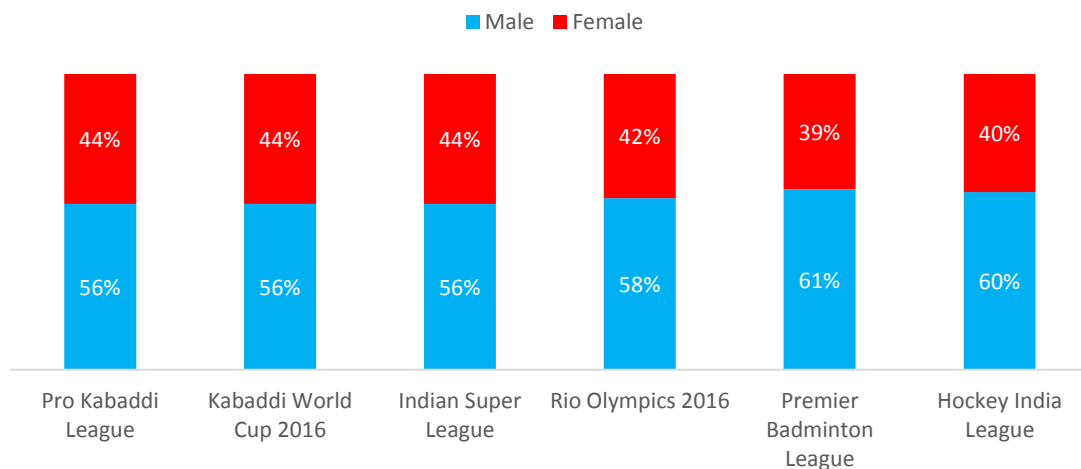


## Who watches these properties?

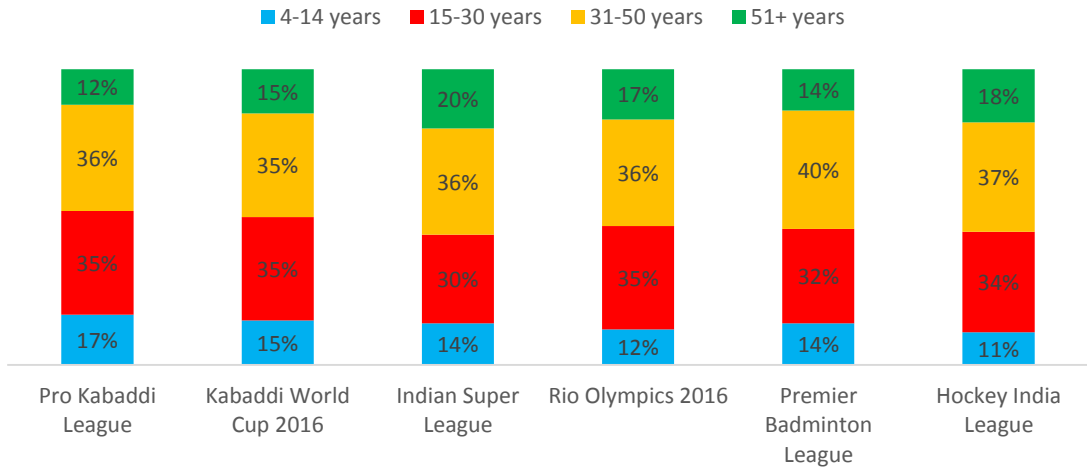
Each property will have a viewership base, in form of either an audience profile (Gender, Age Group, NCCS) or a market, which contributes majorly to its popularity.

Let us first take a look at the audience profile of each of these properties.

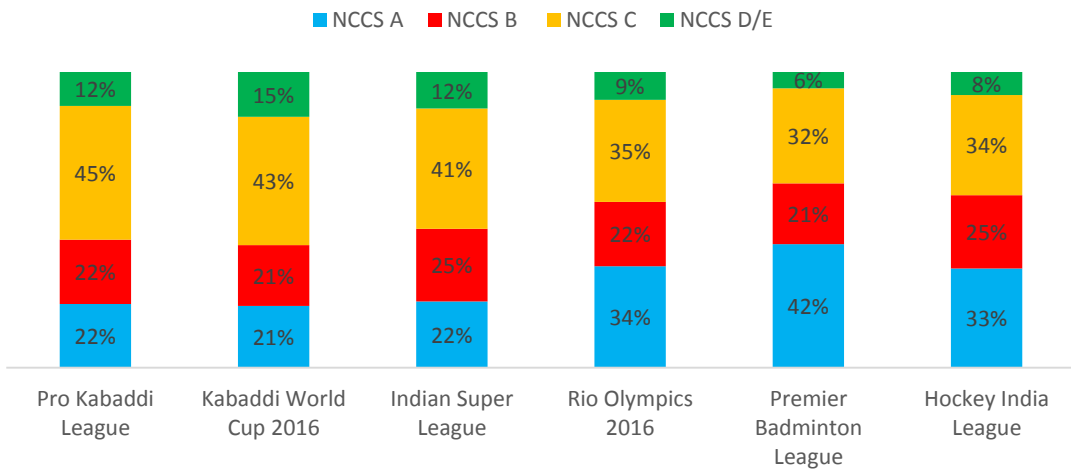
### Gender



## Age Group



## NCCS



The three most popular properties, Pro Kabaddi League, Kabaddi World Cup 2016 and Indian Super League, all have a higher viewership of Female viewers as compared to the other properties.

They also have a higher contribution from the lower NCCS i.e. NCCS C and NCCS D/E. Conversely, Rio Olympics 2016, Premier Badminton League and Hockey India League have a high contribution from NCCS A.

Kabaddi also has the highest contribution from the younger age-groups – 04-14 years and 15-30 years, among all properties. Surprisingly, Football has the highest contribution by 51+ years age group among all properties.



Let us take a look at which markets contribute to the viewership.

Market	Pro Kabaddi League	Kabaddi World Cup 2016	Indian Super League	Rio Olympics 2016	Premier Badminton League	Hockey India League
AP / Telangana	32%	39%	1%	10%	10%	9%
Assam / North East / Sikkim	1%	1%	17%	8%	17%	9%
Bihar	1%	0%	0%	1%	1%	1%
Chhattisgarh	2%	1%	0%	1%	1%	1%
Delhi	2%	2%	1%	4%	5%	3%
Guj / D&D / DNH	2%	3%	1%	4%	3%	4%
Jharkhand	0%	0%	1%	1%	1%	3%
Karnataka	12%	15%	1%	6%	11%	8%
Kerala	5%	5%	30%	8%	3%	4%
Madhya Pradesh	2%	1%	1%	5%	9%	4%
Mah / Goa	24%	15%	5%	12%	13%	13%
Odisha	1%	1%	1%	3%	4%	7%
Pun / Har / Cha / HP / J&K	7%	7%	2%	11%	7%	13%
Rajasthan	3%	2%	1%	5%	1%	2%
TN/Pondicherry	1%	2%	7%	7%	7%	9%
UP/Uttarakhand	3%	3%	1%	10%	4%	5%
West Bengal	2%	1%	28%	5%	5%	5%

\* % share of Sum of Normalised Impressions'000

There is a clear preference across markets for different properties.





Kabaddi as a sport is followed the most in AP/Telanganana, followed by Mah/Goa and Karnataka. However, within that, the share of Mah/Goa in Pro Kabaddi League is much higher than for Kabaddi World Cup 2016. This may be a reflection of the fact that U Mumbai team was the 1<sup>st</sup> runner up in Pro Kabaddi League Season 3.

In keeping with the conventional wisdom, Indian Super League has maximum viewership in the football crazy markets of Kerala, West Bengal and Assam/North East/Sikkim. Interestingly, this is the only property which does not have a high viewership in Mah/Goa.

Rio Olympics 2016 has the maximum viewership spread across multiple markets. This may be due to the fact that it is multi-sport event with no regional teams.

Surprisingly, Premier Badminton League has the maximum viewership in Assam/North East/Sikkim market.

As in the case of Pro Kabaddi League, Hockey India League has the highest viewership in Pun/Har/Cha/HP/J&K market, which had the winning team of Punjab Warriors.

It is clear that, in addition to a general interest in the sport, a well performing Home team leads to higher viewership in the market.





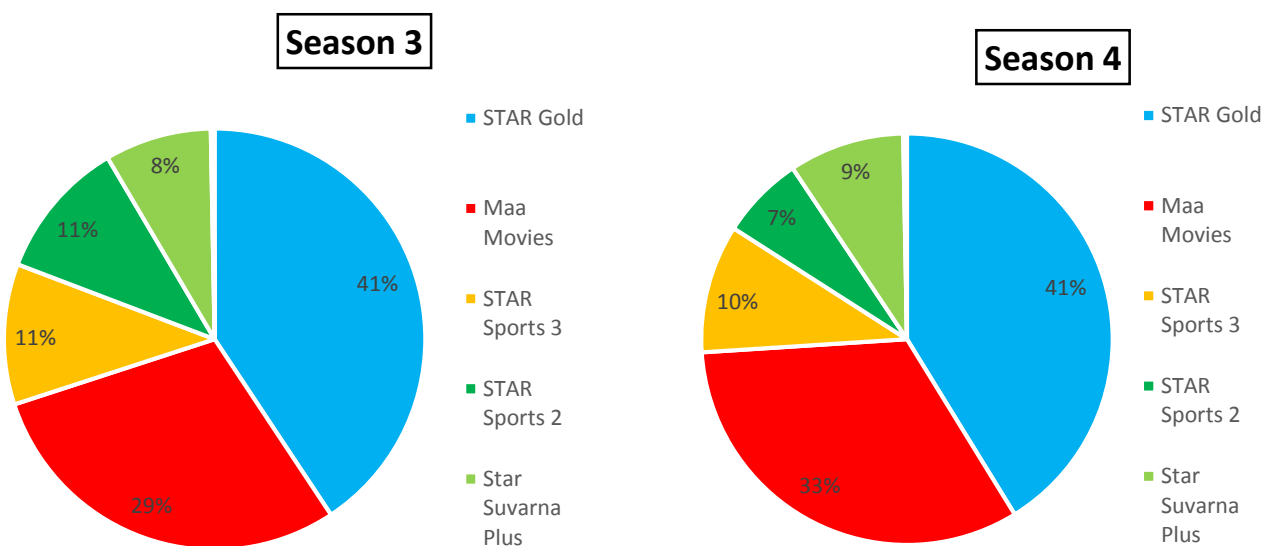
## Taking a closer look at Pro Kabaddi League

Pro Kabaddi League is by far the most popular non-cricket property with a 61% of viewership share.

Pro Kabaddi League is a professional kabaddi league in India, based on the format of the Indian Premier League T20 cricket tournament. It currently has 8 teams competing in the tournament - Bengal Warriors, Bengaluru Bulls, Dabang Delhi, Jaipur Pink Panthers, Patna Pirates, Puneri Paltan, Telugu Titans and U Mumba. The league has a "caravan format," with the teams travelling together to all the eight venues to play a total of sixty matches.

From 2016 onwards, Pro Kabaddi League became a 5-week event having two editions a year. The tournament was played once in January–February 2016 (Season 3) and once in June–July 2016 (Season 4).

### a. Analysing the viewership pie



\* % share of Sum of Normalised Impressions'000

Star Sports is the official broadcaster of the league. In addition to the Sports channels, the league is also telecast on several Movie genre channels in the Star network – Star Gold, Maa Movies and Star Suvarna Plus. This decision seems to have paid off for the network as close to 80% of the viewership, for both seasons, comes from the telecast on Movie channels. Star Gold has the largest share of the pie with a 41% contribution to the viewership.

Further, the contribution of Movie channels to the total viewership has gone up from Season 3 to Season 4 – from 78% to 83%.

## b. Ad sector preferences

Ad Sector	Pro Kabaddi League	Indian Super League
Personal Care/Personal Hygiene	14%	7%
Telecom Products	13%	1%
Telecom/Internet Service Providers	13%	3%
Durables	13%	0%
Food & Beverages	12%	8%
Services	12%	24%
Banking/Finance/Investment	11%	7%
Auto	5%	34%
Fuel/Petroleum Products	4%	0%
Alcoholic Drinks	2%	6%
Household Products	1%	0%
Miscellaneous	0%	0%
Personal Healthcare	0%	0%
Education	0%	11%

\* % share of Duration (seconds)

The ad sector presence on Pro Kabaddi League is widely distributed with 7 categories, of the total 13 categories present, having a comparable share.

We have seen above that Pro Kabaddi League has a high contribution from Female viewers (44%). Despite this, Female specific sectors are not present on Pro Kabaddi League. Female targeted sectors (Personal Care/Personal Hygiene, Household Products, Personal Healthcare) contribute only 15% to the total duration. As opposed to that Male categories (Durables, Banking/Finance/Investment, Auto, Fuel/Petroleum Products, Alcoholic Drinks) constitute 35% of the total duration.

Further, we have also seen that Pro Kabaddi League has a higher share from youth as compared to Indian Super League.

However, if we compare it to the ad sector presence on Indian Super League, we can see the entire Education sector is not active on Pro Kabaddi League. Additionally, the service sector, which includes several e-commerce websites, has a much lower presence on Pro Kabaddi League.

Is Pro Kabaddi League a potential opportunity for female and youth targeted categories?



### c. Team loyalty in home markets

While it is a given that matches of the Home team will see higher viewership in the Home market as compared to other teams, we have tried to see if there is any effect of the match location on the viewership. Do matches of the Home team perform better / worse when they are held in the Home stadium?

Team	Venue Type	Home State*	Home City*
Bengal Warriors	Home match	60	20
	Away match	58	19
	Growth/Degrowth during Home match (%)	4%	4%
Bengaluru Bulls	Home match	531	75
	Away match	452	51
	Growth/Degrowth during Home match (%)	17%	45%
Dabang Delhi	Home match	64	
	Away match	57	
	Growth/Degrowth during Home match (%)	13%	
Jaipur Pink Panthers	Home match	111	
	Away match	137	
	Growth/Degrowth during Home match (%)	-19%	
Patna Pirates	Home match	29	
	Away match	39	
	Growth/Degrowth during Home match (%)	-27%	
Puneri Paltan	Home match	815	
	Away match	719	
	Growth/Degrowth during Home match (%)	13%	
Telugu Titans	Home match	1453	105
	Away match	1372	98
	Growth/Degrowth during Home match (%)	6%	7%
U Mumba	Home match	784	238
	Away match	861	235
	Growth/Degrowth during Home match (%)	-9%	1%

\* Avg. Normalised Impressions'000; Home state: West Bengal for Bengal Warriors, Karnataka for Bengaluru Bulls, Delhi for Dabang Delhi, Rajasthan for Jaipur Pink Panthers, Bihar for Patna Pirates, Mah/Goa for Puneri Paltan, AP/Telangana for Telugu Titans, Mah/Goa for U Mumba; Home city: Kolkata for Bengal Warriors, Bangalore for Bengaluru Bulls, Hyderabad for Telugu Titans, Mumbai for U Mumba

With the exception of some markets, the Home matches have seen a higher viewership as compared to the Away matches. The maximum growth is seen for Bengaluru Bulls, where viewership of Home matches is higher by 17% in Karnataka and 45% in Bangalore.

The only teams that do not see a growth during Home matches are Jaipur Pink Panthers, Patna Pirates & U Mumba.

In the case of U Mumbai, there is a minimal growth in the Home city of Mumbai. However, the Home state (Mah/Goa) does not see any growth. This may be due to divided loyalties among the viewers, as this state has two teams competing in the league. The other team, Puneri Paltan, sees a growth in viewership during Home matches.

Additionally, all the three teams – U Mumba, Jaipur Pink Panthers and Patna Pirates, were all finalists. The Home matches have not seen any growth as the Semi-Finals and Finals, which have the maximum viewership, were all Away matches.

However, it must be noted that the interest in each match will also vary basis several other factors - how closely contested it is, individual player performances, likely impact on team qualification chances, etc.

The actual intensity / importance of matches basis these has not been factored currently.







## Summary

80% of the viewership for non-cricket live sports comes from just 6 properties – Pro Kabaddi League, Indian Super League, Rio Olympics 2016, Kabaddi World Cup 2016, Premier Badminton League, and Hockey India League.

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Pro Kabaddi League is the most popular non-cricket property with a share of 61%, followed by Indian Super League.

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Indian Super League, with one of the best Impressions/Reach ratio, has extremely high stickiness amongst its viewers. Broadcasters could target advertisers looking for high engagement space.

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The popular properties - Pro Kabaddi League, Kabaddi World Cup 2016 and Indian Super League, have a higher contribution share from Female viewers & lower NCCS viewers. Broadcaster could safely have more of popular FMCG brands in these properties.

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Close to 80% of the Pro Kabaddi League viewership comes from the telecast on Movie channels, and this share is increasing.

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Ad sectors targeting Females & Youth can look at presence on Pro Kabaddi League given it's relatively higher viewership base on the property.

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Home matches see a higher viewership as compared to the Away matches in the team's Home market. This might help regional advertisers.

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