



ViewerTrack

FIFA World Cup 2006

Pre-Tournament Predictions

Initiative, a leading global communications company



World Cup 2006 predicted to break audience records

Introduction

The major quadrennial sporting events, namely the FIFA World Cup, the IOC Summer and Winter Olympics and the UEFA European Championships, have an undisputed effect on the global advertising and sponsorship markets. This year, the impact of the FIFA World Cup is set to be larger than ever before as Initiative predicts that the tournament will break audience records.

This summary report outlines the most important reasons why.

World Cup returns to Europe

Since its beginnings in 1930, the FIFA World Cup has traditionally seen its largest followings in Europe and South America. As FIFA sought to extend football's global appeal, two of the last three FIFA World Cups have been held in "non-traditional" markets, namely the USA in 1994 and Japan / Korea in 2002. This year, the World Cup will be held in one of football's major powers, Germany.

Holding the World Cup in one of football's heartlands will have a large positive effect on in-home global TV viewing figures. TV audiences in Europe and South America were most adversely affected by holding the 2002 World Cup in Japan and South Korea. With matches broadcast during the afternoon and evening this year in both of those zones, rather than at night or during the morning as was the case four years ago, it will be far more convenient for European and South American fans to watch the games.

Consequently, viewing figures will bounce back for this year's World Cup after a decline for in-home viewing in many countries in 2002. For example, ViewerTrack's analysis of the 2002 World Cup compared with 1998 showed decline in average live audience per match of 74% in Brazil, 53% in the UK, and 39% in France.

World Cup returns to terrestrial TV in many markets

The FIFA World Cup has historically been broadcast on terrestrial TV in order to maximise the tournament's reach. However, many of the matches in the 2002 World Cup were only shown on pay-TV in a number of major markets, such as Germany and Spain. By shifting the World Cup onto pay-TV, many viewers had fewer opportunities to enjoy watching the excitement at home.

This year, more World Cup matches will be broadcast on terrestrial TV in many of these countries, which will lead to sharp audience growth.



Growing popularity of football

Football has long been the world's most watched TV sport. Its popularity continues to rise as new audiences emerge. New fans are being attracted as the sport takes on an ever larger role within popular culture.

Women are watching football in record numbers as footballers become celebrities as well as sportsmen. In some countries, women are nearly reaching parity with men in terms of watching major football tournaments, particularly when their own team plays.

FIFA's push to extend the global appeal of the World Cup into new markets has been a major success. For example, the unexpectedly good performance of the South Korean team when it hosted the 2002 World Cup has led to football assuming unprecedented importance in that country. Even in many countries where football is not yet the number one TV sport, it is becoming more popular. Awareness and interest of the game is rising due to global broadcast coverage of club football via pay-TV.

This globalisation of football was one of the most important reasons why UEFA Euro 2004, the most recent major international football tournament, was the most watched European Championships ever. Initiative's ViewerTrack report on that tournament showed that global audiences rose by more than 20 per cent in 2004 compared with Euro 2000. This was a phenomenal achievement in an era of audience fragmentation.

Brazil predicted to win the audience stakes for the 2006 World Cup

Football plays an even greater role in Brazilian culture than in other football-mad countries within South America and Europe. The last time the FIFA World Cup was held in Europe, in 1998, average ratings per match were highest in Brazil. Brazilian audiences are also likely to be attracted by the 'Local Hero Syndrome', if the Brazilian national team performs as well as expected. We therefore predict that average ratings per match will be highest in Brazil for this summer's World Cup.

Brazil's matches are also likely to be more popular globally than games featuring any other team. Fans love watching exciting, attacking football and Brazil's play is synonymous with that. In both 1998 and 2002, Brazil's matches drew larger global audiences than those of any other team.

The global popularity of the Brazilian team is likely to increase yet further in 2006. Global coverage of the leading European leagues, where Brazilians are playing in ever greater numbers, has brought their star players even greater exposure and fame. With the celebrity element of football more important than ever, hundreds of millions of viewers all around the world are already fans of the likes of Ronaldinho, Ronaldo et al, and will be cheering them on this summer.



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