



Synovate Media Fact Sheet

India: A sporting life

Who was asked?

The Synovate / Blackstone Market Facts survey was conducted in late October and early November 2003 via face-to-face interviews in households, following a structured questionnaire.

The 1,007 sample size was drawn from:

- North zone - Delhi, Lucknow
- East zone - Kolkata
- West zone - Mumbai, Ahmedabad
- South zone - Chennai, Hyderabad

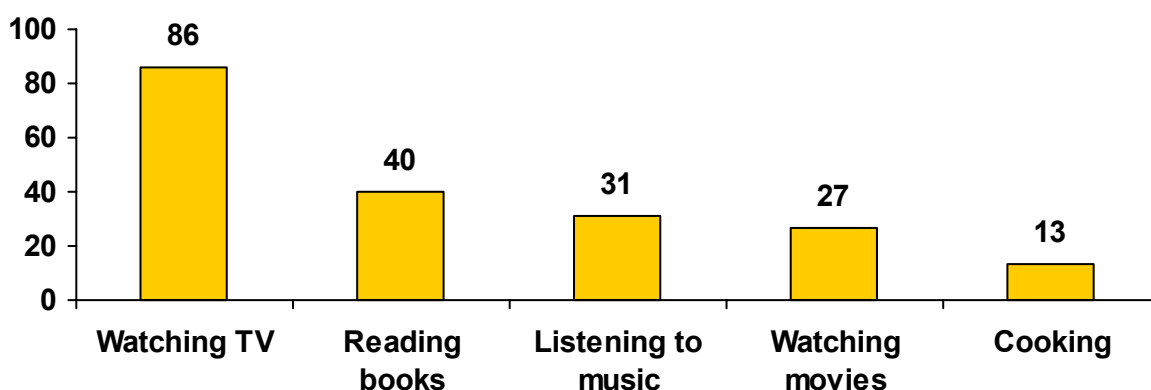
and was split amongst age groups 15-25 years, 26-35 years, 36-45 years and 46-55 years (25:25:25:25).

There was 60 per cent male respondents and 40 per cent female.

And what do they do in their leisure time?

The Synovate sports survey asked how Indians spend their leisure time... and a massive 86 per cent wind down by watching television. Activities like reading (40 per cent), listening to music (31 per cent), watching movies (27 per cent) and cooking (13 per cent) are also enjoyed.

Leisure activities for respondents (%)





One interesting finding was that only eight per cent of survey respondents listed outdoor sports as a leisure pursuit. Perhaps sport is too serious to be classified as mere 'leisure' to Indians because a later survey question found that 47 per cent of respondents play cricket at least once a week!

Which sports are played?

The never-ending Indian love affair with cricket is.... well... never-ending! Of all the sports played in India, this one wins the participation stakes hands-down. People live it, love it, dream about it, play it.

Overall, 58 per cent of the survey respondents have played cricket and 29 per cent currently play. While the love of cricket cuts across all demographics, the sport is certainly played more by the younger generation - with 55 per cent of 15-25 year olds playing and only 17 per cent of 36-45 year olds.

Indeed, Indians pleasure cricketers just can't seem to get enough, with 47 per cent playing at least once a week and many of them managing to squeeze in up to three games a week.

Is it only cricket?

Lucky for other sporting bodies, some other games do seem to get a look-in, albeit at much smaller rates of participation. 23 per cent of those surveyed had played badminton at some stage in their life and 23 per cent had played football / soccer. Ten per cent of male respondents currently play football / soccer and seven per cent of the women surveyed currently play badminton.

So, who gets off the couch?

The study also looked at sports club membership, health and exercise regimes and the watching of live events. Some findings are:

- The majority of those surveyed do not belong to a club or sporting club, with only 15 per cent having memberships of this kind.
- Despite all the cricket-playing, only 15 per cent claim to have a regular health and exercise regime. This changes across age groups with:
 - 24 per cent of 15-25 year olds enjoying an exercise regime;
 - 15 per cent of 26-35 year olds in the gym and / or exercising;



- only ten per cent of 36-45 year olds; and
- 12 per cent of 46-55 year olds pursuing a regular exercise program.
- By gender, it seems Indian women may need to up the ante on the exercise, with only seven per cent engaged in a regular exercise plan, versus 21 per cent of Indian men.
- A massive 93 per cent of respondents watch cricket on the television, with four per cent watching football / soccer and only one per cent watching badminton, baseball, tennis, track & field and other Indian sports.
- When it comes to live sporting events, again cricket hits all the sixes! 74 per cent of respondents love to watch it live, with 19 per cent watching no live sports and three per cent watching football / soccer live.
- However, only 18 per cent have attended a live sporting event in the three months prior to the late October study, although this could be attributed to a lack of live international cricket games during that period. Nevertheless, 18 per cent is still a fairly high patronage for live sporting events.
- Of those 18 per cent that have viewed a live sporting event in the last three months, 89 per cent of them watched cricket, 12 per cent other Indian sports, nine per cent football / soccer and nine per cent tennis.

Aspirations and sporting dreams

The sports study also looked at the sporting aspirations of Indians and who makes the cut when it comes to sporting heroes.

When asked if they had ever dreamt of playing sport for India at the national or international level, 35 per cent of respondents agreed this had been part of their dreams at some stage. Of those 35 per cent, the vast majority aspired to play cricket for India (75 per cent).

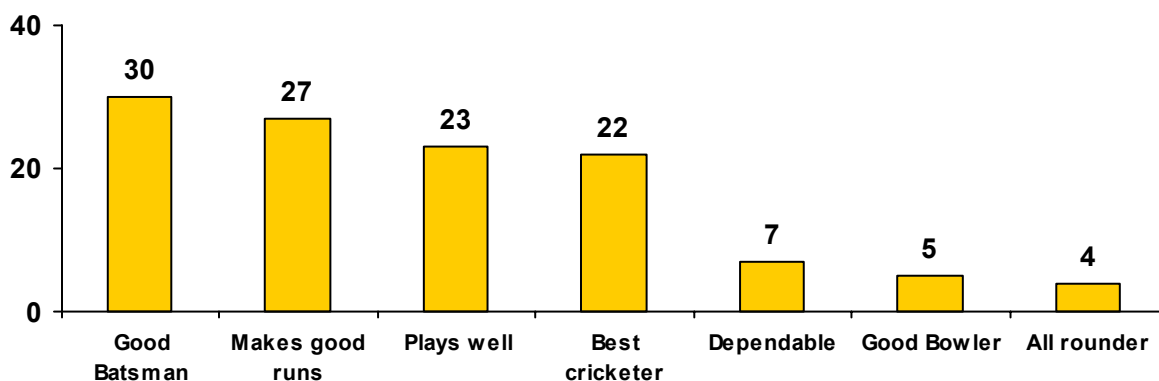
Who do you love?

Moving from dreaming to people who are doing, when asked about their most admired Indian cricketer of all time, a huge 64 per cent answered Sachin Tendulkar. The next most admired Indian cricketer was Kapil Dev (10 per cent) and then Saurav Ganguly (four per cent).



Sachin rules the hearts and minds of the cricket-mad populace because:

Reasons Indians rate Sachin Tendulkar as most admired cricketer (%)



Respondents were also asked about their most admired international cricketer from another nation, with results largely spread across past and current cricketers from Australia, West Indies, Sri Lanka and South Africa. Four per cent were even able ignore the traditional rivalry between India and neighbouring Pakistan and admit to admiring the feared left-hander, Wasim Akram! The results were:

- Ricky Ponting (Australia) - 14 per cent
- Steve Waugh (Australia) - 12 per cent
- Brian Lara (West Indies) - nine per cent
- Sanath Jayasuriya (Sri Lanka) - eight per cent
- Adam Gilchrist (Australia) - six per cent
- Wasim Akram (Pakistan) - four per cent
- Jonty Rhodes (South Africa) - three per cent
- Vivian Richards (West Indies) - two per cent

We also asked - if India were not able to win an international cricket game - which other national team would respondents prefer to see win? And which team would they least like to see win?

Australia was overwhelmingly the team of choice when India was taken out of the equation, with 53 per cent of respondents selecting them as preferred winners behind India. This can perhaps be attributed to Australia's current tour in India (which started just after the survey ran) and the Indian appreciation of sporting excellence (Australia is the current Cricket World Cup holder).

The rankings were:

- Australia - 53 per cent



- Sri Lanka - 14 per cent
- South Africa - nine per cent
- West Indies - seven per cent

And the international team with the least support is... who else but the next door neighbours? 64 per cent of respondents would least like to see Pakistan win an international cricket game, followed by 12 per cent hoping Bangladesh does not win, four per cent Kenya and three per cent would like to see a team other than Australia win.

Interestingly, England and New Zealand are cricketing nations that received negligible mentions in either the 'love' or 'hate' categories by Indians.

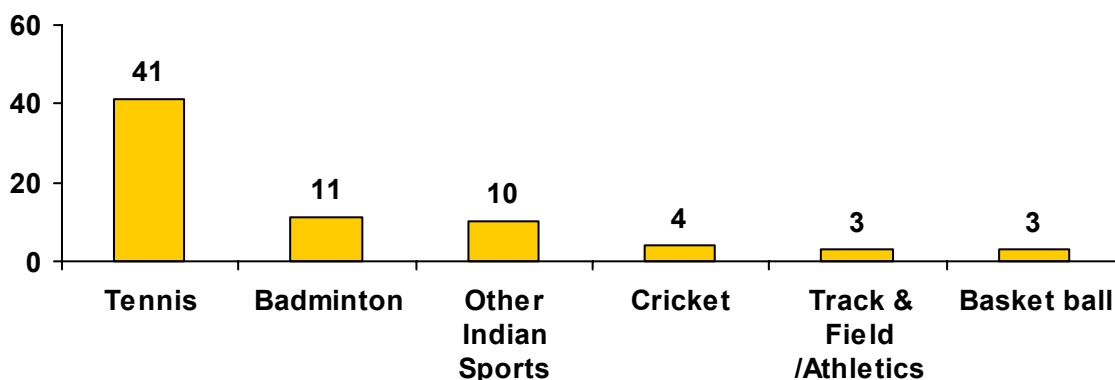
Sporting women

In many countries, women's sport seems to suffer from a lack of viewership on television, lack of sponsorship money, etc. However, in India, there is a willingness to watch women's sports and this is possibly an opportunity for marketers to tap into a more niched audience.

Presumably when the cricket is not on the television, 62 per cent of respondents are more than happy to watch women's sports. Of these, 64 per cent watch women's tennis, followed by 19 per cent who watch women's badminton.

While tennis generates the most interest across women's sports, it seems the opportunities for marketers to target the public via sport have a more even spread in this category.

Favourite women's sports (%)





Show me the money!

Sport is a passion - people laugh, cry, cheer and jeer for their teams - and this makes it big business as well. Marketers often pay huge money for sportspeople to endorse their brands. But does it work?

First, Synovate asked who respondents' favourite celebrities were - whether they were sporting heroes or not. The answers showed an overall fascination with film stars (33 per cent) and cricketers (30 per cent). Individuals that attracted the greater number of mentions were Sachin Tendulkar with 14 per cent naming him their favourite celebrity and Amitabh Bachchan at 13 per cent.

We then asked if brand purchase would be influenced by a favourite celebrity endorsing a product and nearly half the respondents (47 per cent) replied they would be more likely to then buy this brand. That's a lot of people influenced by celebrity endorsement!

To use this information with greatest effect, marketers need to know which celebrities to choose for a brand's target audience, as well as the demographics this strategy works with. The Synovate survey found that celebrity endorsement was most likely to work with teenagers and students. It was also skewed towards the West zone of India - perhaps a 'rub off' effect from the strong "Bollywood" presence in Mumbai.

The survey found that the following celebrities were associated with particular brand names in the minds of Indian consumers.*

<u>Celebrity</u>	<u>Brand recall (Strongest across all respondents)</u>	<u>Brand recall (Next strongest across all respondents)</u>
Kapil Dev	Kinetic (75 per cent)	-
Amitabh Bachchan	Nerolac (52 per cent)	Pepsi (42 per cent)
Sachin Tendulkar	Pepsi (90 per cent)	-

* Respondents were shown 'flash cards' with celebrity faces and a list of brands (both in random order), and were asked to match one with the other. They were able to identify more than one celebrity per brand where they chose.



Shahrukh Khan	Pepsi (60 per cent)	Santro (43 per cent)
Madhuri Dixit	Emami (74 per cent)	-
Aishwarya Rai	Nakshatra (66 per cent)	Coke (21 per cent)
Aamir Khan	Coke (78 per cent)	-
Preity Zinta	Pepsi (41 per cent)	-
Fardeen Khan	Pepsi (47 per cent)	Provogue (17 per cent)
Karina Kapoor	Pepsi (67 per cent)	-
Saif Ali Khan	Pepsi (61 per cent)	-