

THE 2014 FIFA WORLD CUP

Mobile & social estimated usage

Introduction

The 2014 FIFA World Cup is the 20th FIFA football tournament, being held in Brazil between the 12th June and the 13th July.

The 2014 tournament is estimated to be viewed by 3.5 billion people across the globe; although it has been marred somewhat by news coverage of missed stadium construction deadlines, concerns over the distances between venues and the reliability of the transport system, alongside the governments over spending.

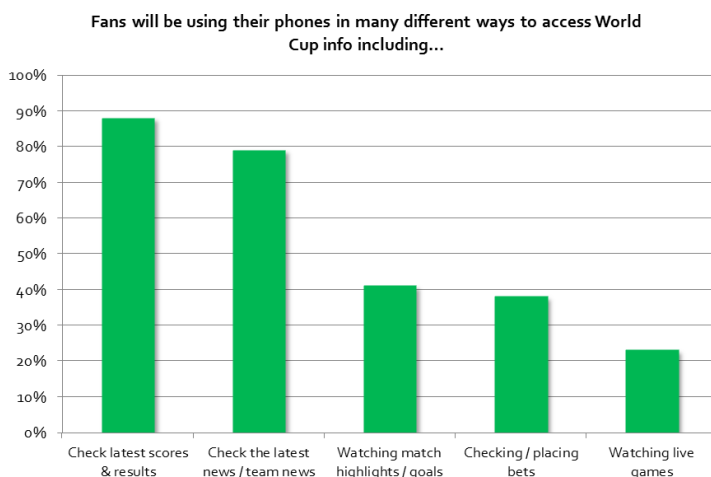
Despite this, football fever has steadily begun to grow in the run up to the tournament with increases seen across search and social, clearly illustrating that the 2014 FIFA World Cup will be the largest event that we have seen across social and mobile devices to date.



FIFA WORLD CUP
Brasil

The supporting role of Mobile

Mobile devices in the UK are expected to play an important, supporting role in the coverage of the 2014 FIFA World Cup. According to a recent eMarketer report, TV remains the medium of choice for watching the games. This is most likely due to the size of the screens, either within the home or pubs showing the games live. Almost half of the respondents also plan to use their mobile phones to keep track of the action, further highlighting the multiscreen dynamic between TV, mobiles and live sporting events.



In separate research undertaken by Weve, 79% of football fans said that their mobile is the number one way to keep up to speed throughout the World Cup.

88% will be using their mobiles to check the latest scores and results, from various sources e.g. social networks, football apps and news sites. This is likely to drive a surge in data usage throughout the event.

Unsurprisingly, a 40% increase in video data usage has been predicted, with fans wanting to watch highlights and even full matches on their mobile devices. Whilst this may seem high, during the last tournament in 2010, mobile data usage increased by 24% globally with video being quoted as a major factor within this. Streaming rose by 22% and YouTube saw their traffic rise by 32% the

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morning after matches, as football fans sought out clips from the previous days games. And with a number of the 2014 FIFA World Cup games being played late at night, we would expect to see this happen again.

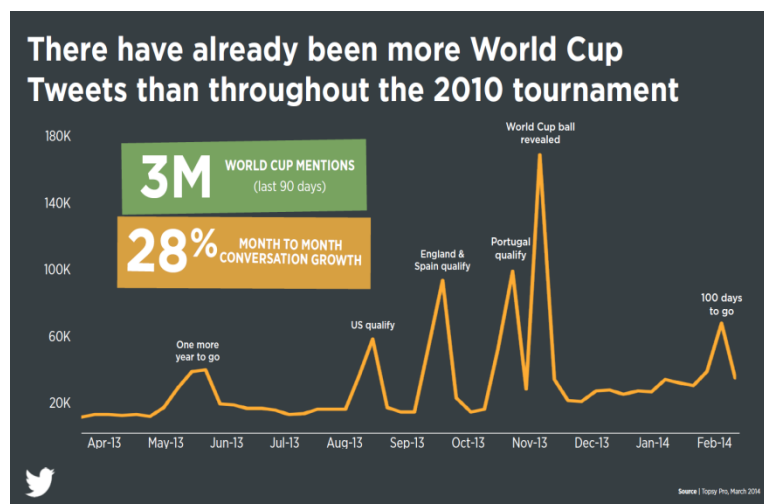
Social media usage

It is estimated that 3bn users will engage with the World Cup this summer across social media, a substantial increase from the 2.3bn who engaged with the tournament back in 2010. A study by On Device Research has revealed that four in five football fans have said social media will improve their overall World Cup experience, with a third claiming it will help them to keep up to date more easily.

Twitter in particular, is expected to receive a significant boost from conversations and vines around the event as we have seen from previous football games. For instance, the Champions League Final generated 8.4m tweets worldwide and more recently Soccer Aid saw 479,050 tweets from the UK alone.

In fact, by March 2014, Twitter had already surpassed the total number of tweets generated by the 2010 World Cup.

Mobile has been the key driver of social media consumption, with 80% of Twitters traffic coming from mobile devices, enabling users to engage with the tournament in real time, from wherever they are. Furthermore, 60% of UK users are known to tweet whilst watching TV, creating a synergy between the content and how it is shared.



The timing of the matches is also likely to increase the usage of social (and therefore mobile) with matches being screened in the UK after work and during the evenings, at 5pm, 8pm and 11pm respectively.

Whilst Twitter has had great success in becoming the companion advertising product to TV, we shouldn't overlook Facebook and their role within social throughout the tournament. Facebook still has an incredibly large global user base (c 500m users), continues to be the largest social network in the UK (3x the size of Twitter) and can also deliver reactive, real time advertising campaigns. In a similar approach to that of Twitter, Facebook believes the platform is a great supplement to TV and live events, with their users commenting and sharing opinions with friends in their newsfeeds. Brazil is Facebook's second largest market and is their largest social network, so I would expect this position to be leveraged throughout the event.

For brands advertising around the World Cup, there has been a greater focus on digital and social. FIFA is focusing activity around social, by launching two hashtags #WorldCup and #JoinIn to support and drive users to their new 'Global Stadium', an online, social and mobile hub which will open for the duration of each match and serve as a place for fans to share their excitement. Building

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a strong fan base across Twitter and Facebook has been core to the development and creation of the hub, in addition to its success.



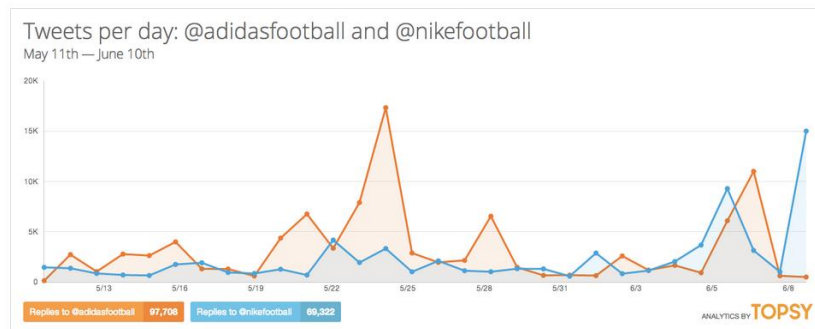
Last week saw Beats release a 5 minute long commercial for the World Cup called 'The game before the game' which chronicles the pregame rituals of athletes like Brazilian star Neymar. Already, the ad has had over 7.5m views on their official YouTube channel, and this does not include those who have shared it across social channels. The song (X Ambassadors & Jamie N Commons 'Jungle') has been touted by some as *the* song of the World Cup.

However, if YouTube views are an indication of which song should be crowned the World Cup anthem, Shakira is by far the clear winner. In partnership with Danone Activia to support the World Food Programme, the new song La La La has had over over 102m plays, almost 25m more than the official song from J. Lo and Pitbull. Furthermore, the campaign has helped deliver over 3m additional school meals for children in developing countries. A very worthy cause.

In one of the battle of the brands, Adidas have launched their largest ever campaign to support its World Cup sponsorship called 'All or Nothing', and have opted to spend more money on digital marketing than TV ads, quoting that 'this will be the most social World Cup ever and probably the most social event in history'.

Nike (who are not a World Cup sponsor) never one to be outdone this week launched their 5 minute long animated commercial titled 'The last game'. It is expected that this will feature heavily within the digital arena.

Adidas and Nike are no strangers in competing for consumers' attention, however according to conversations on Twitter so far; Adidas is currently ahead. It'll be interesting to see whether this remains the case.



As with the two examples above, creation of content and video is higher. Like Christmas, there have been more brilliant commercials (or mini films) which are predominantly living in the digital space.

We have also seen similar approaches from other World Cup advertisers e.g. Sony, Coca Cola, Visa, and Budweiser, all of whom have launched campaigns with a heavy presence in social and digital to support their sponsorship.

How should brands behave around the World Cup?

1. Act in real-time

Whether reacting to action within the games or adapting a campaign throughout the tournament to complement performance; delivering campaigns in a timely manner is becoming increasingly important, especially when associating with a live sporting event.

As with Oreos around the Superbowl, brands are creating 'war rooms' to be able to respond to the action with timely, smart and insightful content to seed across social platforms.

Consider which products may appeal to football fans e.g. BBQs, outdoor leisure, and what content can be developed to help build a relationship outside of ecommerce.

Equally important however, is to also recognise when it's best not to talk. As the saying goes - just because you can, doesn't mean you should.

2. Become part of the conversation

Brands have an opportunity to capitalise on second screening behaviour by becoming part of the conversation in social. However if you are not an expert in football it may be wise to focus on celebrations and wishing luck, rather than risking the wrath of fans. An opportunity exists for 'unleashed' to play a tactical role supporting England throughout the matches e.g. BBQ man in an orange apron celebrating an England goal.

The increase in traffic throughout the tournament will also increase ad opportunities. As with search and mobile, it is important to consider the mind-set of the audience and what is likely to resonate with them.

3. Reach football fans in the right environments

In addition to the surge in social media usage from mobiles, video content is also expected to receive high traffic levels. An opportunity exists in focusing media spend into the right environments to capture the audience's attention e.g. advertising across Sky Sports / football app, ESPN, or targeting specific video content on YouTube mobile would enable us to reach a heavy male audience that we could target with products, such as outdoor leisure.

4. Exploit consumer search behaviour

Google has also witnessed significant increases in worldwide searches for the football tournament during the past few months. In order to capitalise on the increases, onsite content and products should relate in some way e.g. a BBQ and outdoor leisure page, for the perfect World Cup BBQ party.

5. Create, inspire and engage consumers

Content is hugely important for digital campaigns focusing on real time marketing and social. Sport in particular is a very visual event. Where possible, you should look to develop content to share across digital platforms in the form of images, videos and infographics. Inviting users to develop and share content can also help to build your brands presence.

Summary

There is a clear indication that the 2014 FIFA World Cup will be the most social live sporting event ever witnessed across the globe.

Mobile usage will significantly increase throughout the tournament with the device taking on a lead supporting role to TV.

Social media will help football fans keep up to speed with all the scores and action, as well as sharing their opinions throughout the tournament.

Brands (sponsors, team sponsors, non-sponsors ambushing) are investing heavily in digital and social, capitalising on the increases in traffic and audience penetration.

Questions?

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Appendix

Weve 2014 FIFA World Cup Research

Football by the numbers

79% of fans agree their mobile is the number one way to keep up to speed on football

73% of fans text friends during matches about what's going on

85% of fans expect to be accessing tournament info via their phones once a day

Fans will be using their phones in many different ways to access World Cup info including...

88% - checking latest scores and results

79% - checking the latest news/team news

41% - watching match highlights/goals

38% - checking/placing bets

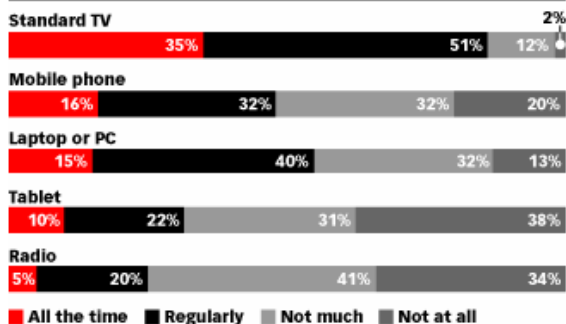
23% - watching live games

eMarketer 'Mobile Devices to Play a Support Role for Millennial World Cup Fans in the UK' article

June 3rd, 2014

Devices that UK Millennial Internet Users Plan to Use in Order Follow the 2014 World Cup, by Frequency, May 2014

% of respondents



Note: ages 16-24; numbers may not add up to 100% due to rounding
Source: Voxburner, "Sports events, brands and young people" as cited in company blog, May 21, 2014

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www.eMarketer.com

UK Mobile Users Who Access Sports Content via Mobile Device, by Age, March 2014

% of respondents in each group



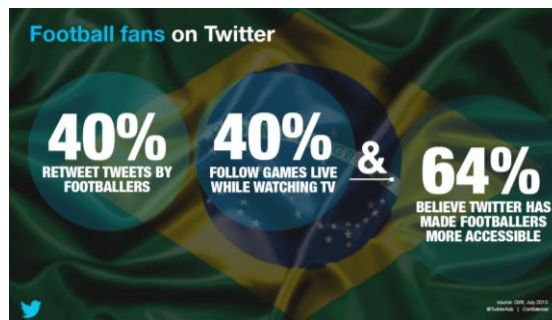
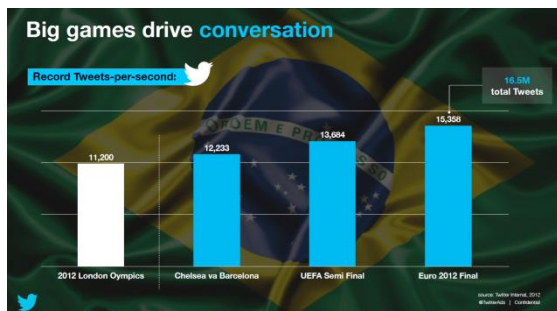
Note: includes tablets

Source: Mobile Marketing Association (MMA), "Sport & Fitness" conducted by Global Market Insite (GMI) and in association with Imagine Mobile as cited on company website, April 30, 2014

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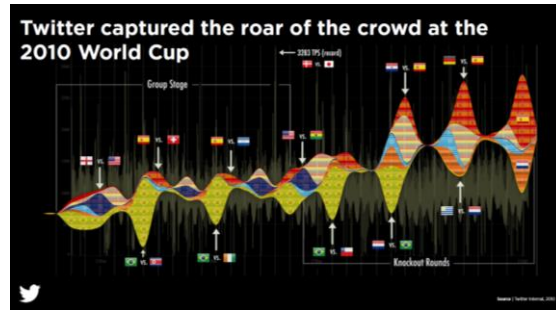
www.eMarketer.com

Twitter Futbol 2014 Playbook / Twitter World Cup 2014



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