

World Cup marketing – it's not just the football result that's hard to predict

An Experian White Paper

Table of contents

1. Introduction	2
2. Getting back to basics	3
3. Understanding consumer attitudes	4
4. Global or local marketing?	4
5. Working the channels	5

1. Introduction

World Cup marketing – it's not just the football result that's hard to predict

As World Cup fever starts to spread across the country, marketers and advertisers will be looking to capitalise on the patriotism and goodwill created by the biggest event in the sporting calendar.

Behind every campaign, months of work will have gone in – from market research, campaign brain-storming and field testing through to media planning – to make sure that any company aligning itself and its brand with the tournament leaves a positive impression with its target market. No company wants to score an own goal with its promotional activities during what is being touted by many sports commentators – pending the recovery of a certain player's foot - as England's best chance of lifting the cup since '66.

Industry observers are predicting a \$1billion investment by advertisers for this year's event – which will break all previous records. However, getting the most from this significant investment is not simply a case of taking brand 'X' and introducing a football theme to create instant success. The bottom line is that consumers are more marketing savvy than ever.

According to research conducted by Experian®, the global information solutions company, advertising and marketing campaigns looking to tap into the spirit of the World Cup are dividing English consumers.

2. Getting back to basics

Distinct attitudes to companies' World Cup promotional activities emerge from Experian's research. The views and opinions held by consumers fall into four categories:

- 1) Supporters
- 2) Diehards
- 3) Activists
- 4) Avoiders

1) Supporters

Supporters are probably the easiest to market to with World Cup offers. These are people who are willing England on to repeat the '66 triumph and will watch as much football as humanly possible, soaking up the atmosphere that only the World Cup creates. They understand and even expect companies to offer World Cup themed promotions and are positively disposed towards them – a quarter of this group feels that the advertising and marketing bonanza adds to the World Cup atmosphere.

It is worth noting that one in ten of all consumers that took part in Experian's poll stated that they have already made a purchase in response to a World Cup promotion. The number one reason for women making a purchase was that a promotion offered them a 'good deal' (37 per cent), whereas for men it was all about the promotion being relevant to their interest in football (43 per cent).

Demonstrating the extent to which patriotism can colour consumers' purchasing decisions, one in five admit that they would be more inclined to respond to a promotion if the company behind it is English.

However, there is a word of caution for advertisers and marketers from English consumers. 41 per cent of the consumers that took part in Experian's opinion poll will be far less likely to respond to any kind of World Cup promotion if England gets knocked out. This is one key influencer which advertisers and marketers have absolutely no control over.

2) Diehards

The second group is also made up of football fans but remains unimpressed with World Cup themed promotions in general. The diehards' focus for the next few weeks is entirely on the football – almost to exclusion of everything else.

44 per cent are completely turned off by football themed advertising and marketing campaigns.

For some, their responses merely indicate indifference to football promotions. For others, however, indifference escalates into irritation.

One in three gets upset because they think that some companies are simply jumping on the bandwagon and using the event as an opportunity for commercial gain. Almost 60 per cent of the over 50s are the most vociferous critics of what they regard as 'World Cup opportunism'.

The highest proportion of those English consumers shunning commercialism in the run up to the tournament live in North East England.

Potentially the toughest to please are the male diehards. One in five is turned off by World Cup advertising and marketing campaigns, particularly when they cannot see the link between what the company is selling and football.

3) Activists

47 per cent of respondents aged 26-35 would like companies to offer promotions aimed at people who don't like football.

The 'activist' category sums up those English consumers who have little interest in football and in some cases actively dislike the beautiful game. However, they do not want to miss out on marketing offers or promotional campaigns – as long as they are not football related.

It is interesting to note that over 40 per cent of all of the consumers taking part in the opinion poll believe that companies should tailor promotions before and during the World Cup specifically aimed at people who don't like football. This is a view most commonly expressed by almost 50 per cent of 26 to 35 year olds.

4) The Avoiders

41 per cent claim to dislike football.

The last group describes those consumers unlikely to respond to any kind of marketing (pro- or anti-football) during the World Cup period as they are doing all they can to avoid the tournament.

Reading is cited as the most popular alternative to watching the World Cup (33 per cent).

These are individuals who not only dislike football, but are also annoyed by the disruption the World Cup brings to their lives. In order to avoid being exposed to any of it, they intend to choose solitary pastimes such as reading or listening to music – giving advertisers little or no opportunity to market to them at all.

At least the younger avoiders are a little more outgoing, with those aged 17 - 25 preferring to be shopping, going to the cinema or eating with friends whilst the football is on.

3. Global or local marketing?

60 per cent get annoyed by non-English companies' World Cup themed promotions.

For international brands, marketing to an English audience could be a potential minefield. Many consumers admitted to getting irritated by non-domestic companies which they believe are trying to cash in on English patriotism. This view becomes even more prevalent with age, increasing to 70 per cent for those aged over 65.

25 per cent are more inclined to respond to an offer from an Official World Cup partner.

Ironically, a quarter of consumers admitted that they would be more inclined to respond to a promotion from an Official World Cup partner. The 15 Official Partners of the 2006 FIFA World Cup™ are: adidas, Anheuser-Busch, Avaya, Coca-Cola, Continental, Deutsche Telekom, Emirates, Fujifilm, Gillette, Hyundai, MasterCard, McDonald's, Philips, Toshiba and Yahoo!. None of which could be described as 'born and bred' English companies. One could construe that this highlights the many global companies marketing effectively at a local level.

4. Working the channels

Companies will use a range of marketing channels during the World Cup to get their message across and Experian's survey reflects why taking a multi-channel approach is vital.

Of the ten per cent of consumers who have already made a purchase in response to a World Cup promotion, TV was the most effective broadcast medium for men and women, accounting for 44 per cent of purchases. The second most popular channels were e-mail for men (23 per cent of purchases) and direct mail for women (25 per cent of purchases).

5. The winners?

Experian's research shows that consumers' views on World Cup marketing activities are polarised. There is no north / south divide, nor any discernable difference in attitude between the sexes. English consumers either understand and accept marketing and advertising around the tournament or they don't. The split really is that clear-cut.

Based on the survey's findings, one could argue that marketing during this highly-charged sporting event will be high risk, but also high reward for the companies that get it right. Ultimately, success will come down to the fundamentals of marketing – tailoring the right message for the right audience at the right time.

Clearly, football and the World Cup are not to everyone's taste. There is a whole consumer market that will do whatever it can to avoid the tournament altogether. Admittedly, it will be a mammoth task, but the signs are that there are English consumers prepared to go to such lengths to do so. For the smart companies, these people present an opportunity and may welcome offers and promotions that will enable them to get away from football for the next couple of months.

So, after the games have been played and the battles won, which companies are likely to come out on top?

English consumers – irrespective of which group they fall into – all noted companies in the sports goods, drinks, food, credit card and banking sectors as running the most successful tournament campaigns to date. It would certainly appear that for a company and its products to register with the marketing savvy World Cup follower, it has to have heritage and display authenticity. Without these traits, it could be turning them off in their droves.

This report is based on research conducted by Canvase Opinion, Experian's consumer research service. The views of 1,135 English consumers were polled as part of an online quantitative and qualitative survey



Embankment House
Electric Avenue
Nottingham
NG80 1EH
United Kingdom

T: 44 (0) 115 968 5640
F: 44 (0) 115 968 5430

www.experian.co.uk/marketingolutions