DECODING THE ENIGMA **INDIAN FOOTBALL**

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2019

DECODING
THE ENIGMA
INDIAN FOOTBALL



MARCH 2019

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Fiona Green
Gido Vader
Martin Toms
Prakhar Soni
Ramit Singh Chimni
Richard Hood
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Simon Chadwick
Tarundeep Singh
The Rasich Group
Vikram Philip Rajkumar

We must also thank Arka Bhattacharya who has helped put this book together and has done a wonderful job of ensuring that all the sections tie together and provide a wholesome reading experience.


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ALL INDIA
FOOTBALL
FEDERATION
INDIA
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FOREWORD



KUSHAL DAS
General Secretary
All India Football Federation

For the past 6 years, FICCI has taken up the role of spreading knowledge about the rise of Indian football to stakeholders from various backgrounds. It is heartening to see the consistency of support that FICCI has provided to Indian football over this period.

At the AIFF, our focus has been to grow the sport in the country through various avenues, all of which add up towards making football more popular and accessible.

We are extremely proud of the manner in which our National team has performed at the International stage over the past 12 months. Our players have captured the imagination of the country by their competitive performances on the field. The AFC Asian Cup UAE 2019 witnessed tremendous support for the effort put in by our National team which was visible on the ground, back home in India as well as on social media.

We have also worked with our partners to promote the broadcast of Indian football to as many homes as possible and have achieved a steady increase in air time received by Indian football through the year on both digital and traditional platforms. Never before has the Indian audience had access to these many minutes of live Indian football for the I-League, the ISL and National team games across age groups.

Another initiative that we are proud of is the promotion of grassroots endeavours which has seen hundreds of baby leagues being setup throughout the country within the last 12 to 18 months.

I must acknowledge the role that State and District Football Associations have played in increasing the profile of football in their respective regions. They have been helping ensure access to tournaments for talented players across age groups which has furthered the efforts of the AIFF in taking football to all corners of our country.

We at AIFF have always believed in an inclusive approach and eagerly look forward to engaging with all those who share our common vision for the sport, both for men and women. I am confident that enough momentum has been created to ensure a high return on investment for all those who choose to contribute their resources towards the growth of football in India.


BRINGING
ASIA
TOGETHER
AFC
ASIAN CUP
UAE 2019

FROM FICCI'S DESK



DILEEP CHENOY
Secretary General
Federation of Indian Chambers of Commerce & Industry

India has the largest youth population in the world. It is imperative to ensure that for the success of our nation, we meaningfully engage the 350+ Million youngsters in India and give them means beyond education and employment opportunities to showcase themselves and attain a sense of accomplishment, which they can transfer to their personal and professional lives.

Football has played its part globally in engaging the youth and imparting skills which are often otherwise ignored. FICCI is committed towards bringing together stakeholders from different segments to play their part in the larger goal of spreading the sport throughout India.

This book focuses on collating the thoughts, ideas and concrete action points from experts around the world and link them with the current state of the game in India.

We hope that this initiative plays an integral part towards increasing the visibility of opportunities available in football for all concerned stakeholders.



INTRODUCTION



VARUN ACHREJA
Co-founder,
World1 Sports

The year 2019 marks the fifth year of the Indian Super League and thus five years of meaningful influx of funds into football in India. Historically, football in India has had mainly three sources of funds to utilize. The first being those allocated by the Centre, State Governments and FIFA all of which were primarily utilized for the administration of the sport both at the central and state level. The second were funds that the PSUs and the other corporates spent as part of their CSR or employee welfare budgets. These were mainly used for the purpose of running company branded teams in various regional and national competitions and partly diverted towards NGOs that looked to spread the sport at the grassroots level. Finally, funds were made available by individual enthusiasts who were willing to pump in money because of their love for the game.

As you can see, none of the above three sources stem from a business outlook and accordingly the consistency of these funds have always been a question mark that has surrounded the Indian Football industry.

In 2010, when IMG-Reliance bought over the rights to all commercial activities from AIFF, it marked the beginning of the change in ecosystem that would drive fund flow into Indian football. Within 4 years, the ISL was born through investments by numerous corporate houses, high net worth individuals as well as a broadcast partnership with Star India.

Some of the companies and celebrities that invested in Indian Football at that time included, Asian Paints, the Goenkas, Rajesh Wadhawan Group, Ranbir Kapoor, Abhishek Bachchan, John Abraham, Sachin Tendulkar and Sourav Ganguly amongst others. This clearly had a direct impact in increasing investor confidence and the realisation that football in India can be looked at from a business standpoint as well.

The main beneficiary of this influx of funds has been the service industry for football, including event management companies, fan engagement companies, player representation agencies as well as operations and logistic companies.

Another set of beneficiaries have been the players who have now received 10 more teams to play for and consequently, improved employment opportunities.

In this report, we will delve further into the growth of the business of football across its various verticals as well as focus on what lies ahead for each vertical and investment opportunities within it.

The 6 verticals that we have covered include:



Within these verticals, we have proceeded to divide each section into 4 segments. The first presenting a series of facts that are relevant for any reader to understand the numbers and relevant information that define the vertical. The second is a thought piece by an expert within that vertical, wherein they have provided their inputs, thoughts and ideas about the vertical. The third segment lists down an outlook for the vertical, both from a technical and commercial standpoint. Finally, we have summarized in a single page the strengths, weaknesses, opportunities and challenges that impact financial opportunities available for the various stakeholders within each vertical.

This book is a small step towards creating a positive and progressive ecosystem around the sport of football, which in turn should motivate more and more corporations and individuals to put in their money and effort in the sport.

We are committed towards playing our part in this endeavour and hope to witness the change that all well wishers of Indian football are hoping for.

CREATING A CULTURE FOR FOOTBALL



DR. MARTIN TOMS
Senior Lecturer, Sports Coaching, School of Sports & Exercise Sciences
University of Birmingham

Dr. Toms is a sports ethnographer and has experience in education, coaching and club settings. He has researched, presented and published in the area of sports experiences of young people and talent and participant development. He has been working closely with Sports Authority of India and was a keynote presenter at SAI CON 2017.

There is no doubt that sport is inherently influenced by culture, and that this is a process of development from local through to national levels. In India, this is quite clearly linked to hockey and cricket, with the revered hockey legend Dhyan Chand and National Sports Day, which is celebrated on his birthday 29th August. An excellent example of when sport is engrained within and beyond the everyday life into culture. I have been lucky enough to visit his memorial statue in Kasauli (Himachal Pradesh), and to understand the role he played in hockey in India – a true part of the culture of sport.

As someone with extremely close family links to India, the understanding of sports within the culture is central to my own experience, knowledge and academic work. Having been fortunate enough to work with the Sports Authority of India over the past few years, this is absolutely fundamental to the development of sport and of India as a sporting great (beyond the cricket pitch). The excellent work being undertaken by sports scientists and coaches at SAI is showing that as sport grows, so does success, and understanding this is important in the development of football at all levels.

To develop a sport it has to be part of the national culture and psyche, it cannot be developed in a day but rather takes careful integration through schools, local societies, in playgrounds and more particularly with parents (especially when academics is their central focus). Without their support, it is difficult to develop clear systems that then create a culture within that. Since cultures work bottom up, this is not something that can be created quickly, but something that requires time, thought, effort and a generation of like-minded individuals. India's excellence at cricket was not something that occurred overnight, but rather was the development over a long period of time. This applies to all sports in all countries,

and the acceptance of this process is important in long term development as well as long term football culture creation.

If you look at the major footballing nations and teams, they have had the game as their central sport for generations, engrained in their culture and as part of their "sporting cultural isotope" (something deep and engrained within their nation. In other words, like cricket and hockey in India it is a part of the fabric of life, school and after school culture and there are processes in place to allow talent to be developed and nurtured (not forced) where a large part of the footballing population is allowed to grow at their own rate. Then, through a grass roots system of local and then regional teams, true talent can emerge. The example of local culture is personified in Indian football by the preponderance of players who come from the North East of the country. Like many areas/cities/regions of the world that seem to produce good players, much of this comes down to opportunity and facilities available to the younger population as well as the engagement with that sport within their area/region or even culture. To invest in football, we must invest in communities and youth as much as elite teams.

From the academic research and evidence it is clear that one thing that is important is allowing young people/players the chance to engage in multiples sports and activities in order to develop the key skills needed with football. The links and possibility of transferring talent and skill across sports is extremely valuable, as is the basis of many talent systems. We know, for example, that hockey goalkeepers (most obviously) will be able to transfer their skills to football (as may other positions). However, being given the opportunity to engage with multiple sports into their teens is a good way of ensuring that the key skills across sports are developed, rather than 'guessing' a child's sporting talent and forcing them to play that sport. This 'early specialisation' approach is a very high risk and low return, with burn out, drop out, injury and complete loss of interest at risk. The use of research and sports science to support the development of athletes is one that can be linked to culture quite easily. The growth of Olympic success in the UK is down to a combination of factors (education, sports science, grassroots funding and development structures), however it is a not a model that easily transfers to other countries, and thus football development in India needs careful nurturing and planning across all levels to be effective, and this should be done at a local level.

Culture is thus vitally important in sport at all levels. But culture can only be built from the bottom up. So investing in football at a grassroots level is important and will allow the culture of the sport to grow at all levels in the way that the culture of things like mobile telephones improves in the hands of generations as they develop.

To produce a grassroots and elite sporting culture it is important that you build strong foundations. Introducing football (amongst other sports) at a young age is key, embedding it (as hockey and cricket have been embedded) as an option for people to play is also crucial and it is that which will slowly allow the development of talented players. Link this to an organised and structured system of community based teams, clubs and facilities will further enhance this. However, taking into account social, religious, geographical and even dietary issues into account, then any development needs to be done sensitively and carefully to ensure the best opportunity is given to produce the best players. Whilst we know that the development of high level performers and teams takes time, we also know that in order to achieve that we must invest at all levels. Creating football teams is easy – you just need 11 players, but creating football clubs is far more complex and needs very careful planning, structure and consideration for the future. As many European football clubs have done, their culture is

created through their history and shared values within the community, and this is something that is aspirational. More importantly when you look at some of the best football clubs in the world, they are also multi-sport clubs, where young people can experience and engage with a number of sports – of which football is one. It is the creation of clubs like this that are the way forward, with strategic thinking and an all-round culture of sport. My dream would be to see the creation of elite football in India through single location multi-sport facilities that are embedded within the community, linking (perhaps) cricket, hockey and other sports at one location, an opportunity perhaps for the Sports Authority of India or other partners to use their facilities, coaching expertise and knowledge to further sport within the community to further support and develop the creation of a culture of participation in football (and all sports).



As I have said elsewhere about India (Toms, M. (2017) "It's Just Not Cricket! Sports Science and International Collaboration", Association of Commonwealth Universities Bulletin, 192, pp21-23), the use of sports science and knowledge applied at local and national level is crucial in the development of sport. It will take expertise and knowledge to help create the foundations for football in the country, and more importantly it will take culture and time to wake the sleeping giant that is Indian sport. I have been fortunate to work alongside FICCI and SAI colleagues in India for the past 10 years, and to see the passion and opportunity for sporting cultural growth, and in my life time this is a key aim. I would like to see India dominating world football in the same way they dominate world cricket – through passion, hard work, and a culture of sport being central to society and societal development.

We must remember that the growth of football is all about the continual evolution of a sports culture. After all, it takes time for the seed to become a tree.

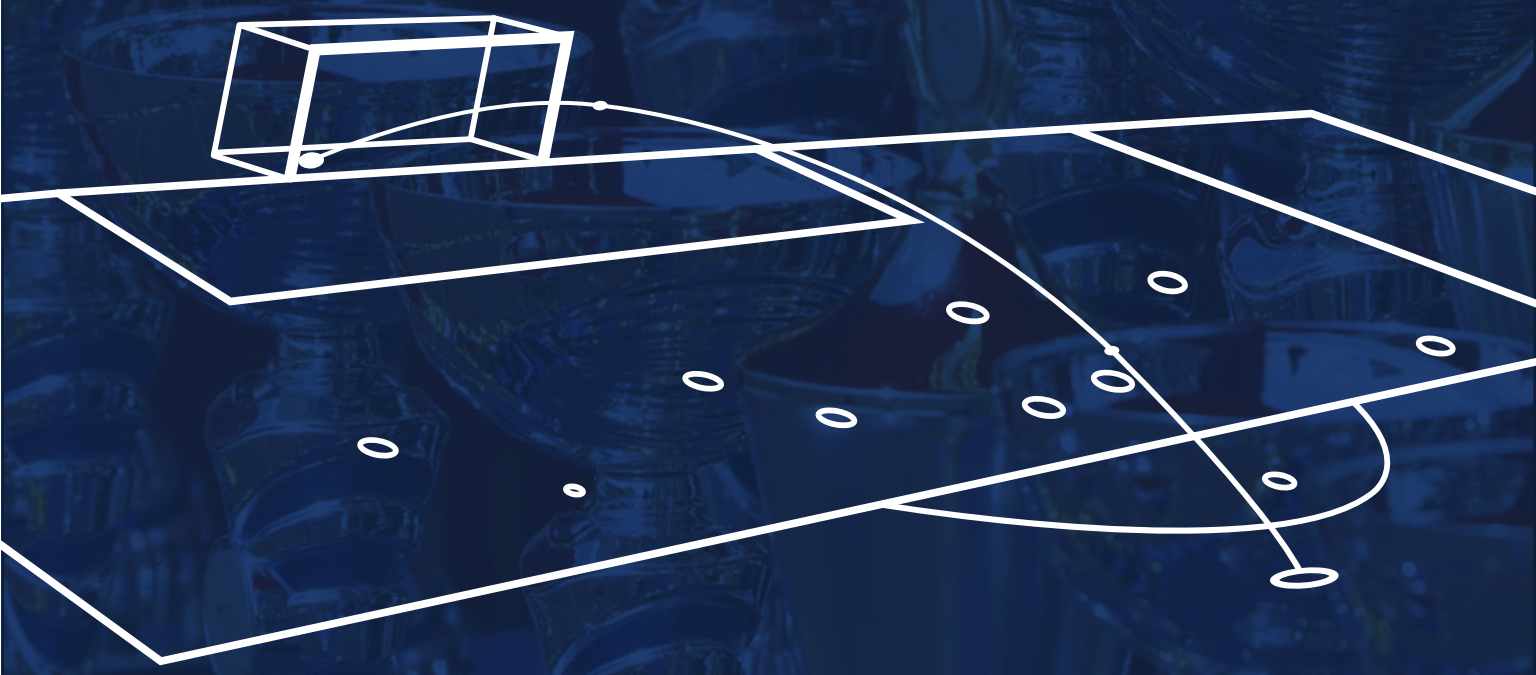
“MORE TEAMS IN PROFESSIONAL LEAGUES WILL PROVIDE MORE OPPORTUNITIES FOR LOCAL PLAYERS.

A LARGER LOCAL PLAYER BASE, WILL MEAN MORE PLAYERS ON SHOW FOR THE NATIONAL TEAM COACH.”

- SCOTT O’ DONNELL

LEAGUES

I. FACT SHEET
II. EXPERT OUTLOOK SCOTT O' DONNELL
III. ROAD AHEAD
IV. SWOC ANALYSIS FOR BUSINESS



FACT SHEET

I LEAGUE	Hero I-LEAGUE	**DURATION**: 6 months **PLAYERS**: 275+	**TEAMS**: 11 **MATCHES** (per team): 20
INDIAN SUPER LEAGUE	INDIAN SUPER LEAGUE ★ RELIANCE STAR ★	**DURATION**: 6 months **PLAYERS**: 250+	**TEAMS**: 10 **MATCHES** (per team): 18 + play-offs
INDIAN WOMEN'S LEAGUE	AIFF IWL INDIAN WOMEN'S LEAGUE	**DURATION**: 3 Weeks **PLAYERS**: 175+	**TEAMS**: 7 **MATCHES** (per team): 6+ Final

STATES WITH HIGHEST NUMBER OF CLUBS



Kerala
750-800



Maharashtra
400-450



West Bengal
300-350

STATES WITH REGISTERED PROFESSIONAL LEAGUES



16 States



11 States

MAJOR BUSINESS CONGLOMERATES INVOLVED IN LEAGUES



JSW, TATA, Reliance, Goenka Group, KWAN, GMS, Quess Corp

NATIONAL LEAGUE BROADCAST PARTNER



Star India Pvt. Ltd.

FOOTBALL LEAGUES- FOCUS ON AUSTRALIA AND INDIA



SCOTT O DONELL
Technical Director, Capital Football (ACT Football Federation)

A former Technical Director with AIFF, Scott was responsible for overseeing the management of Regional and National Elite academies in India. He was also tasked to oversee the technical development aspects of National Team. A former National Team Coach of Cambodia and certified FIFA instructor holding an AFC Professional Diploma coaching license, Scott is now working as the Technical Director of Capital Football which is the governing body of football in the ACT and surrounding regions.

There are quite a few similarities between Indian and Australian football (soccer). I have to mention the word soccer, because in Australia there is also Australian Rules Football (AFL), Rugby League (NRL) and Rugby Union, which all call themselves football.

Football (Soccer) in Australia is the highest participation sport in the country. I think it has more participants than the above-mentioned three codes combined!

Unfortunately, in terms of commercial value it ranks only around 4th or 5th.

Like India, Football is not the most popular sport in Australia.

There are many similarities between Australia and India when it comes to club football:

- Both Leagues do not play enough games in my opinion (ISL has 10 teams and plays 18 games home and away. I-League has 11 teams, 20 games home and away. The Hyundai A-League (HAL) also has 10 teams and plays three rounds, 27 games home and away.
- Both Leagues (ISL and HAL) are closed. This means there is no promotion and relegation.
- Both ISL and HAL have a Final Series. In HAL's case, it is the top six teams that play in the Final Series as follows:
  - Week 1: Elimination Finals 3rd vs. 6th and 4th vs. 5th.
  - Week 2: 1st vs. lowest ranked Week 1 winner and 2nd place vs. highest ranked Week 1 winner.
  - Week 3: Grand Final
- Both Leagues do not have a proper home and away Youth League structure under-pinning the top leagues. Australia

has a National Youth League (U21), but it is divided into two groups (five teams in each, who play each other twice. So, they play 8 games and then a grand final between the top teams from each group. Each team is allowed to field 4 over-age players).

- Both Leagues have flirted with big name stars. The impact that these players have had on the League have been mixed. Some big names to have played with HAL clubs include:
  - Alessandro Del Piero
  - William Gallas
  - Dwight Yorke
  - Emile Heskey
  - Robbie Fowler
  - David Villa
  - Romario
  - Harry Kewell

Some other facts about the Hyundai A-League:

- Squad sizes: minimum 20 – maximum 26
- Maximum four foreign players (no 3+1 rule)
- Three players must be under 20 years of age (can also sign an additional three youth players on a lower pay rate)
- Each club can sign two marquee players whose salaries are exempt from the salary cap.
- Salary Cap was AUD 2.9 million for 2017-18 season.
- Guest players are also excluded from the salary cap for up to 14 League matches.
- Clubs must spend 87.5% of the salary cap.
- Clubs are able to claim a "loyalty players allowance" for players that have played at their club for 5 – 10 years.
- Minimum salary for players is AUD 61,287 p.a.

SO, WHAT FACTORS DETERMINE THE SUCCESS OF A LEAGUE?

Format?
Structure?
Fans?
Goals?

Dominance is a feature of almost every league in the world.

Regardless of size, most leagues tell a similar story. And that is a small number of big clubs dominate. For example, Celtic has won 24 league titles over 50 years in the Scottish Premier league.



TABLE 1. Dominance in 20 European leagues over the last 50 years

COUNTRY	AVERAGE CLUB REVENUE 2012 $M	MOST LEAGUE CHAMPIONSHIP WINS IN LAST 50 YEARS	NUMBER OF LEAGUE CHAMPIONSHIP WINNERS IN LAST 50 YEARS
England	173.8	15	11
Germany	135.0	23	12
Spain	116.3	22	7
Italy	107.5	18	11
France	72.5	8	14
Russia	70.0	13	14
Turkey	38.8	17	5
Netherlands	30.0	23	5
Switzerland	23.8	16	11
Portugal	22.5	22	4
Norway	13.8	22	12
Scotland	12.5	24	5
Poland	7.5	9	12
Romania	7.5	19	11
Hungary	2.9	11	11
Finland	2.0	16	14
Republic of Ireland	1.1	7	15
Luxembourg	0.8	20	11
Faroe Islands	0.5	19	11

Source: *UEFA and Wikipedia*

As can be seen from Table 1 there seems to be no relationship between the size of the league and the extent of domination. Small leagues are as likely to be dominated by a small number of teams as big leagues.

Do policies implemented by leagues aimed at achieving a competitive balance work? In order to keep fans interested, some leagues implement policies such as player drafts (ISL, in previous seasons) and salary caps (HAL). The aims of such policies are to spread players around and to make sure one team cannot buy all of the star players.

Football Federation Australia (FFA) has received criticism regarding the salary cap, particularly when HAL clubs try to compete with the likes of Chinese, Japanese and Middle Eastern Clubs in the AFC Champions League.

PROMOTION AND RELEGATION?

Both India and Australia have closed leagues, therefore no promotion and relegation. The demise of one club affects all of the League. Take HAL club Central Coast Mariners (CCM), they are currently sitting bottom of the HAL table (P 21, W1, D4, L16, GD -32).

It is not a good look for the League. CCM lost 8-2 on Saturday 9th March 2019 and sacked their coach later that night.

Policies such as those mentioned above can cost players in terms of how much they can earn and where the can play.

EUROPE

All European leagues have promotion and relegation.

The English Premier League (EPL), widely regarded as being one of the best leagues in the world has no salary cap and no restrictions on signing players.

Only six teams have won the EPL title since 1992 (Manchester United 13 times, Chelsea 5 times).

The EPL hasn't lost spectators in terms of numbers over the years. That may have something to do with traditional rivalry and local pride. Something ISL and HAL clubs don't really have due to the relative new clubs involved. Rivalry and connections with local teams will take time.

Both countries (India and Australia) have a proud history in club football. But it seems both countries have alienated the traditional clubs at the expense of ISL and HAL. Examples of these clubs include: East Bengal, Mohun Bagan, Dempo SC, Salgaocar (India), Marconi, Sydney Olympic, South Melbourne (Australia).

Obviously both leagues are relatively new but ideally if there was a way of including the older traditional clubs into the ISL and HAL respectively, both leagues may benefit, particularly when it comes to the length of the seasons as well as the traditional rivalry and local pride between clubs.

Let's have a look at characteristics of some of the best leagues in the world:

- Best players?
- Most competitive?
- Number of goals per game?
- Most entertaining?
- Attendance?
- TV viewership?

TABLE 2. League details

LEAGUE	NO. OF TEAMS	GAMES PLAYED	CHARACTERISTICS
Brazil	20	38	Reputation for developing outstanding players. Low attendances. Low number of goals per game.
China	16	30	Big name signings. High attendances.
Germany	18	34	Great youth production, Big name players in their prime. High attendances.
Spain	20	38	Big name players. Newsworthy.
England	20	38	Big clubs. Big transfer fees. High attendances. 2.9 goals per game.

Australia is currently in the process of expanding the HAL. Likewise, ISL is also likely to follow suit. Expansion will obviously extend the length of the season and mean more games played, which can only be a good thing, as long as the newly admitted clubs are professional and can add value to the league in terms of fans, facilities, professionalism and player development.

The relatively short seasons in both leagues makes it difficult for clubs to justify signing players on long term contracts given the respective seasons are so short. Players playing in HAL cannot believe how long the pre-seasons are. Pre-season in Australia is longer than the length of the League. I assume the same applies in the ISL.

As can be seen in the table above, many of the top leagues in the world play between 30 – 38 league games per season plus the various cup games.

More teams in professional leagues will provide more opportunities for local players. A larger local player base, will mean more players on show for the national team coach.

Most importantly for me is the opening of both leagues, i.e. introducing promotion and relegation. Currently there is no motivation for the clubs below the ISL and HAL to continue to invest in football. Likewise, clubs like Central Coast Mariners in HAL can continue to spend the bare minimum and maintain their position in the League. Their performances have been disappointing this season and have had a detrimental effect on the quality and reputation of HAL.

There is no shortage of clubs willing and able to step up into the ISL and HAL. FFA have already admitted the Western Melbourne franchise for next season's HAL and South Western Sydney for the following season.

I know there are pre-existing agreements in place that prevent relegation in the ISL at present. I am confident that once those agreements expire, the ISL will become a much more competitive and popular league once promotion and relegation is introduced. And it is not just the ISL that will benefit, those clubs participating in the leagues underpinning the ISL will benefit as they strive to get promoted. The lower leagues will also become more competitive as a result.

Finally, I want to reiterate the importance of all professional clubs to commit to investing in youth development. In fact, I would make it compulsory for all clubs to spend a certain percentage of their overall budget on youth development (including the introduction of a National Youth League).

ROAD AHEAD

BY EDITORIAL TEAM

The success of any national league format is dependent on the hopes and dreams of promotion as well as the fear of relegation. This is usually achieved through a vertical progression system where various tiers of leagues interlink with each other.

Leagues across India range from the national to the hyper-local, and are the building blocks of the game. The most popular of these leagues are the Indian Super League (ISL), the I-League and the second division, I-League 2. The ISL and the I-League are simultaneously operated top-tier competitions for Indian men's footballers, with teams representing different regions of the country. In India, the primary responsibility of conducting leagues other than ISL, I-League and the second division, lies with the State FAs. Therefore, India adopts a parallel league structure which leads into I-League 2 and thereafter the I-League. The disparity in the league system is significant across states with some having multiple tiers of league football, while others at times do not have a single league in a particular season or leagues of shorter duration that do not align with global player development norms.

The biggest challenge that India faces is to devise a cohesive league system, where each league whether at a regional or national level feeds into a central system. Progression is taken care of with respect to two parameters. The first: Relegation and promotion through a vertical system and the second, through an age-based progression system. Due to the decentralization of the league system in India, age-based progression is difficult to achieve since there is direct entry for teams that want to play in the I-League U15 and U18 tournaments. Another challenge that teams and to an extent, the State FAs face with respect to participation in the regional and national leagues for various age groups is the unpredictability of the calendar and the short time span that is provided between the announcement and the start of the leagues. This phenomenon is not rampant throughout the league system in India but some of the national level tournaments are impacted by this. The State FAs work according to different calendars and do not sync with the AIFF's league schedule.

In women's football, the Indian Women's League (IWL), which started in 2017, currently consists of 7 teams and runs for an approximate span of three weeks. It is the only professional league that runs in the country catering to professional women footballers.

While aforementioned challenges exist, there is a lot of effort that is being invested into advocating the need for strengthening the league system in India, both across genders and age groups.

There is a discussion surrounding the establishment of one top league across the country next year onwards, with the building of a pyramid system below it. The pyramid system is an essential structure in association football, which mandates that the leagues be open to promotion and relegation.

With the creation of multiple tiers within the existing ecosystem and with the introduction of promotion-relegation in near future, the aspiration value of investing in a senior team in India is likely to go up. This will also create clearly defined roles for clubs at various tiers of the pyramid, for e.g.. top-end clubs, feeder clubs, reserve teams and academies.

The future of state leagues remain in creating in-stadia demand for the sport, which in the long run, may translate to television audiences. This transformation largely depends on increasing the technical quality of football being played, the nature of hyper-local connect that teams are able to build with audiences in states and the presence of crowds inside stadia, leading to a better spectacle for the television viewer back home.

With the resources currently invested in women's football low, the successful completion of women's leagues at the state level with a provision for at least 20 games per team, can help overcome the paucity of games at the highest level.







STRENGTHS

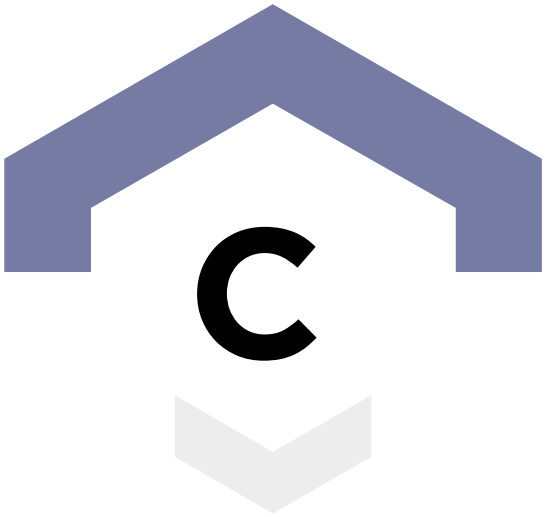
- ISL has brought structure to Indian football and made it appealing for fans
- Dramatic increase in sponsorship not just for the league but also for its various stakeholders
- Better quality of production of Indian football both on TV and digital platforms
- Playing has become more remunerative for Indian footballers
- Playing with experienced foreign players has improved the gameplay of Indian football
- Consumption of the I-League has also increased due to increased demand for Indian football
- Most ISL league teams are owned by corporate giants/wealthy individuals thus ensuring commitment of funds

WEAKNESS:

- Total number of games played by each participating team is lower than the global average of top leagues
- Regular weekday matches impact interest levels and viewership numbers
- Many clubs have not been able to develop a consistent philosophy to provide stability for the league
- The league has not reached a point, where it is generating profits for its stakeholders
- ISL is dependent on the I-League and State Leagues for its talent pipeline, and thus gets impacted by the dearth of age competitions with minimum number of games needed for organic progression
- Capacity building for the organisation of these leagues remains a challenge, as do the financial resources required to conduct leagues for a longer duration across all tiers of football
- Currently, data is available only at the senior-most levels of football but is sparse in the lower reaches of the game

STARTING A LOWER-DIVISION TEAM WITH AN ABILITY TO CLIMB THE PATHWAY TO THE TOP-MOST TIER IS A LUCRATIVE PROPOSITION. INVESTMENT IN THE STATE LEAGUES IS AN IMPORTANT STEP TOWARDS EXPANSION OF TOP-TIER TEAMS.





OPPORTUNITIES:

- Since the league is expanding, potential interested owners can own new teams to be a part of the growth story
- Service companies can provide their expertise to the leagues and clubs for improving profitability
- Sports goods and equipment manufacturers have the opportunity to associate with the league, so as to increase the penetration of their products on a pan India level
- There is an opportunity for some clubs to become feeder clubs thus helping create a new revenue stream for themselves through talent supply
- Data collection at all levels of the league system will help various stakeholders flourish together. Talent identification plus assessment performances of regions/areas as a whole becomes simplified with an ease of access to data from all divisions of football
- Starting a lower-division team with an ability to climb the pathway to the top-most tier is a lucrative proposition. Investment in the state leagues is an important step towards expansion of top-tier teams

CHALLENGES:

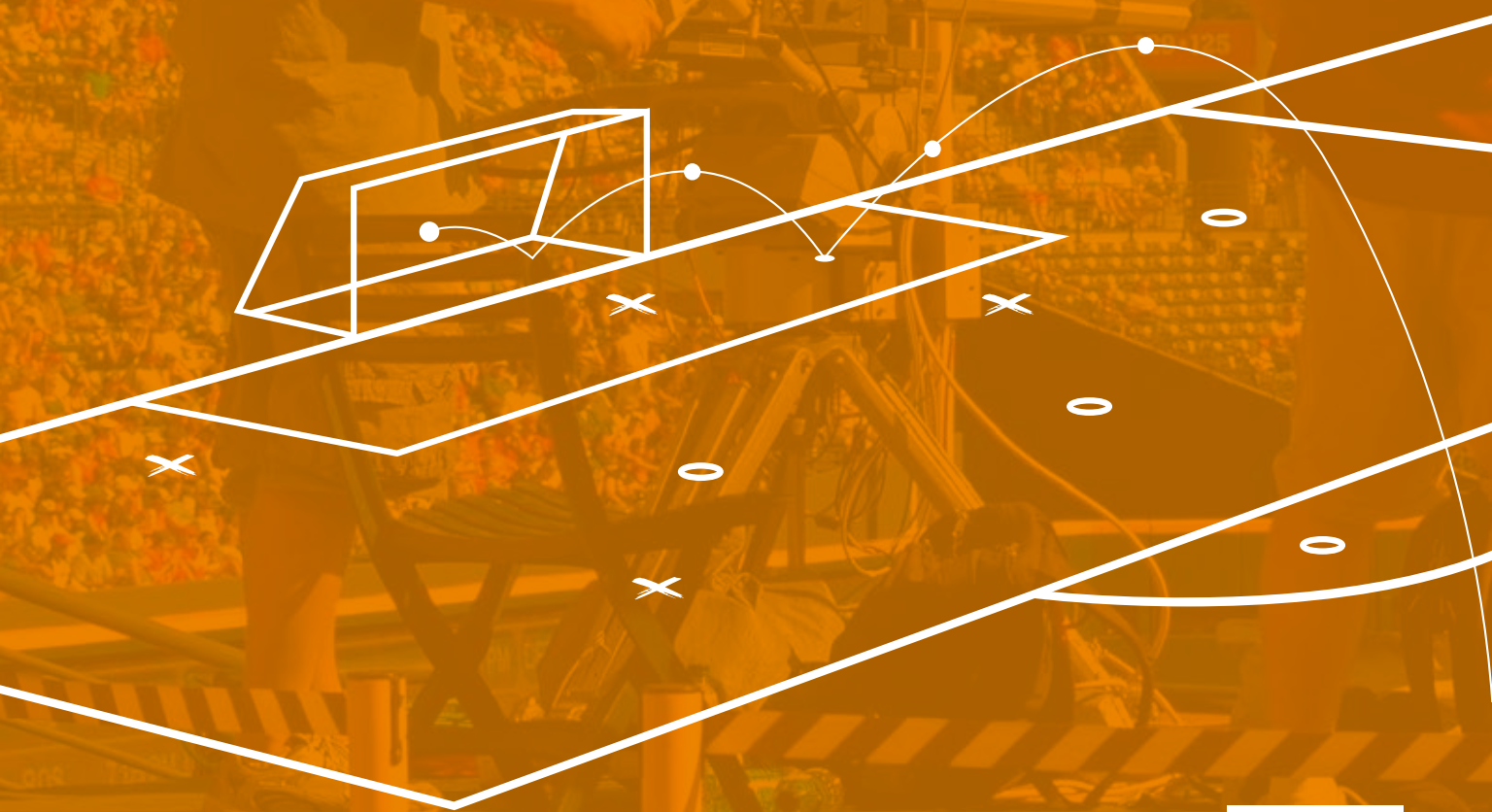
- To work towards self-owned stadiums for the clubs thus increasing their revenue streams
- To draw long term investment commitments by avoiding structural uncertainty
- To be able to create a content dissemination strategy that truly engages the masses
- Uncertain broadcast revenue, scheduling and lack of clear relegation/promotion pathway across the league structure may impact the motivation of some current and prospective clubs
- Financial disparity between ISL and I-League team owners

“WHILE BROADCASTING HAS REVITALISED THE ROMANCE BETWEEN THE BUSINESS AND OPERATIONAL SIDE OF SPORT, IT NEEDS TO REORIENT ITS VISION WITH THE SPORTS FAN AT THE CORE OF WHAT IT DOES.”

- TARUNDEEP SINGH

BROADCASTING

I. FACT SHEET
II. EXPERT OUTLOOK BY TARUNDEEP SINGH
III. ROAD AHEAD
IV. SWOC ANALYSIS FOR BUSINESS



2

FIFA U-17 WORLD CUP INDIA OPENING TV VIEWERSHIP



4.7 MILLION (World Record)

HIGHEST AD SECTOR PRESENCE IN ISL



AUTO (34%)

HIGHEST CONTRIBUTION OF VIEWERSHIP IN INDIA FOR ISL 2018-19



KERALA (30%)

ISL GENDER SEGREGATED AUDIENCE %



56%



44%

TOTAL INDIAN FOOTBALL VIEWERSHIP IN INDIA



150 MILLION 2018-19

BROADCAST LANGUAGES



6

TOTAL ONLINE CONSUMPTION ON HOTSTAR



UNIQUE VIEWERS
12.5 MILLION

Indian Women's League broadcast on Facebook. A few state leagues shown on MyCujoo. Calcutta Football League shown on 24 Ghanta. Mizoram Premier League shown on Zonet HD.

THE EVOLUTION OF INDIAN SPORTS BROADCASTING



TARUNDEEP SINGH
CEO & Co-founder
KIPPIS

With almost two decades of experience in planning for a brand's journey across all phases, Tarundeep was a part of the core team promoting the English Premier League and Formula 1 in India in early 2000s. Over the years he has been a consultant for sport franchises and has been part of core teams at the Indian Super League, Pro Kabaddi league and the ICC Cricket World Cup 2015. Tarundeep is a former AVP, Marketing & Communications – Sports with Star India where he was tasked to manage the sports portfolio of Star across Cricket, Football, Hockey, Kabaddi, Tennis and Formula 1.

PAST, NOT SO PERFECT

The evolution of the Indian sports broadcasting market came with the emergence of India as a force in the international cricket arena- both on and off the field. Before the 1990s, and even during the glory of 1983, television was still out of reach for an average Indian and came with an annual licence fee levied on it (courtesy our penchant for following everything British). While the withdrawal of the licence fee bought in more TV buyers, Doordarshan was still enjoying a monopoly with respect to sports broadcasting until the early 1990s.

The foreign and economic policies of a certain Dr. Manmohan Singh, reformed a whole lot of industries in 1992-93. The economic reforms witnessed an influx of foreign investment in the Indian economy. Sports broadcasting wasn't to be left behind. The Board of Cricket Control in India for the first time ever sold the global telecast rights for England's tour of India to Trans World International (TWI), who in turn sold them to Doordarshan, making it the first ever broadcasting deal in Indian Sports Broadcasting.

By the late 1990s and early 2000s, reception and distribution of Satellite TV was permitted by the Government. The growing young populace, increasing spending power and an on the rise content consumption saw specialized sports networks entering the country bringing about coverage of a range of sports which were previously largely inaccessible to the Indian sports fan. ESPN can be credited for building a significant fan base for several international sports properties such as the English Premier League, Formula 1 and professional wrestling which helped sports broadcasters to not be completely dependent on cricket.

The liberalisation of the society coupled with ajar economic reforms, brought in a host of consumer products that required advertising to draw the attention of the consumer. A healthy

mix of stakeholders driving demand and supply for live sports encouraged and continue to encourage broadcasters to contest for sports rights. The various elements of a healthy sports broadcasting ecosystem were gradually falling into place and India was on the cusp of a sports broadcasting revolution.

Cricket, owing to its format of breaks after every 6 balls, became the perfect vehicle to send out brand messages. Coupled with the fact that the national team was emerging as role models and heroes for a nation, which started pinning their emotions to the sport.

While the Gen Y and Gen X were fed early dollops of football through the Sancta Sanctorum of the game, FIFA World Cup, it was not until late 1990s that India woke up to global Club Football. The 1999 UEFA Champions League Final, between Manchester United and Bayern Munich, was at large responsible for turning Indian youth of the millennium into fans from understandably just flirts.

By 2002, the FIFA World Cup was sampled by 75 million Indians, with the cup final between Brazil and Germany, getting a higher TVR than an Indian Cricket test, an unheard of feat. By 2006, the erstwhile ESPN Star Sports, was making as high as INR 60 Crore from advertising spots for the month long event.

"India is a sleeping giant (of football) that now needs to be awakened" The then FIFA Chief, Sepp Blatter quipped as he boarded a flight to the country in early 2007.

CURRENT CONCURRENT

Today, 12 years later, sports broadcasting and football have come a long way in awakening the 'Sleeping Giant of World Football.'

Taking a step back, in a capitalist society as ours, we thrive on content that offers entertainment, emotion and an experience. Just like cinema, and to some extent music videos, sport was one of the industrial age's new form of entertainment, which drove emotions and offered an intense experience. Sport provided a collective catharsis of ecstasy and agony, triumph and defeat, euphoria and despair, all in all as a collective experience. It built communities based on emotion, folklore, memories, connection and sometimes personality.

And as we evolved into a passive participating community, the sports broadcasting landscape evolved from single sport to multi sport. Giving us more choices to relive and experience emotions collectively in our home or homes. And now with opinions and experiences being shared online, mobile is the preferred screen that allows sharing the experience while consuming sports.

During my time at Star Sports, we took on the task of increasing the nation's interest in football with an equity partnership in the Hero Indian Super League (ISL). The insight was the ever-growing popularity of foreign leagues, not only in terms of viewership, but following, buzz and engagement. In the first year, the goal was to kickstart an ecosystem, that a) brings fans to stadiums, to TV to digital to watch Indian football, b) serves a platform for Indian talent to develop, c) focuses on grassroots development and d) brings in corporate equity to the sport.

The challenges were aplenty, starting with the perception of quality of Indian football at that stage. The Indian sports fan was unwilling to invest time, effort and money into the sport. Hence the biggest task was to create and pique interest in Indian Football. Now, broadcasting is all about Storytelling and we are a country of storytellers. We grew up on stories in the books, on TV, on radio and in culture, meant to drive moral or behavioural change in us.



For ISL, the narrative was simple - drive the journey of an average Indian sports enthusiast from an Indian Football flirt to an Indian Football fan. The storytelling during the ISL broadcast centred around Indian football- players to watch out for, Indian goalscorers, Indian emerging player, player of the tournament- to build recognition and aspiration for the talent pipeline. Today ISL not only serves as a platform for Indian talent to develop and grow their skills, but also focuses on grassroots development of the sport.

FUTURE FANTASTIC

The World's largest Youth Population is also the second largest smartphone market in the world. Our young are hungry for content and enjoy a content hangover.

The proliferation of internet and mobile access among the Indian population is changing the game for sports broadcasting. We are moving into a 'sport content model' than the 'broadcast model', the difference being, now we will consume what we like to, not what we are presented with. The entry barriers or costs earlier restricted the ability to create, control and distribute sports in India. Today, football leagues and clubs in the country have their own publishing and video teams, churning out content for the fans to consume during and off season.

The rise of smartphones have resulted in new models at creation as well consumption end of the spectrum- On Demand Content. While Live Sports is still a premium commodity, as it should remain a revenue stream, the present focus for both Indian sports federations and broadcasters, should be to extend the reach of their properties to the widest possible audience in India, including such demographic groups as well as regions which may have been previously ignored.

That's why, vernacular feeds are where the next big audience will come from. Getting

close to the action of your favourite footballer in feeds with commentary and coverage in vernacular languages is the call of the day.

For all sports consumption, we believe in the MERIT model. A model that we had presented to a client during a failed pitch. The MERIT model primarily is around making good sports TV.

Today the myriad emotions, the intense experience and the adrenaline driving entertainment is driven not only by how close you



take the viewer to the action, but how much he can engage- be heard, be seen, be recognised.

Indian Football needs its own MERIT story. This story needs to be inclusive. It seeks participation from all stakeholders- league, organisers, federation, clubs, agents, agencies- all involved. Sports governing bodies, leagues and event organisers need to determine a balance between protecting the exclusive interests of broadcast rights holders, against the interests of dissemination and wider public access of sports events and content. A monopolistic situation, where the sport is under the control of a specific body or organisation needs to be weighed against losing the mass appeal opportunity for the sport. Non availability of content freely or on public broadcaster not only reduces existing fan engagement, but it also diminishes the ability of the sport to garner fresh fans and attract new audiences beyond existing pockets.

The sports fan is after all the ultimate stakeholder. While broadcasting has revitalised the romance between the business and operational side of sport, it needs to reorient its vision with the sports fan at the core of what it does. The ultimate goal should be to focus on mass interest and engagement, balanced with set of regulations that are both free market as well as visionary.



ROAD AHEAD

BY EDITORIAL TEAM

Football is among the highest consumed sports in the country, and events such as the introduction of the Indian Super League, organizing the Under-17 World Cup and the participation of the senior national team in the AFC Asian Cup 2019 have helped to increase the profile of the game domestically.

Fan engagement is central to broadcasting and continuous interaction of the fans with products and various sporting properties that have cropped up in the country, is the challenge for upcoming leagues in the country.

Currently, the Indian Super League and the I-League are the two footballing competitions that are shown on national television. With the length of a proposed single-tier league expected to be longer than that of the existing leagues, sponsors are expected to derive greater value from the prime-time broadcast of the upcoming league.

The brand value of teams or individuals involved within the sport also contribute greatly to the viewership and sustained interest in competitions. India's first league, the National Football League, had a brand life of 11 years. Later, fans had to switch to the I-League and the Indian Super League, two new brands. The lack of continuity in association with a particular brand diminishes recall value for the occasional fan.

The returns from broadcast are also critical to the feasibility of running a top-tier football club across the world. Annual returns based on league positions ensure that a competition remains competitive till the very end.

Broadcasters rely on the popularity of the sport in order to ensure higher viewership, which in turn entice sponsors to put their money into advertisement on to the broadcaster's platform. These eye balls are usually reserved for entertainment products which engage mass crowds by getting them addicted to watching a storyline which is gripping and entertaining. In the context of football, this is usually achieved through the following ways:

Currently, the Calcutta Football League (CFL) and the Mizoram Premier League (MPL) are two of the top domestic leagues that are showcased

1. *Where the fan is taken on a journey which has the promise of ending with a victory or bragging rights over other fans.*
2. *Where the fan is attached to the personal access that they are granted to the teams and their players, helping create a personal bond with them irrespective of results.*
3. *Where the fan is from the community that a particular club belongs to and the team has climbed its way to now being covered by the broadcaster. Therefore the achievement is being broadcast itself, irrespective of winning or losing*

on local television. The inclusion of more local leagues stands as an opportunity to State FAs and teams to gain visibility and returns from games. For broadcasters, properties such as the CFL and MPL are small but meaningful investments, destined to pay returns in the long term. The future of all content, including football, lies in streaming services.

The second edition of the Indian Women's League was streamed on Facebook. Furthermore, the pre-season exposure tour games of the Under-17 India National team were also being streamed through Facebook. Larger social media platforms like Facebook, Instagram, Twitter and YouTube can be leveraged to bridge the gap between football clubs/institutions and the viewers.

Football clubs in India are yet to produce content that can be showcased on platforms like Netflix, Amazon Prime and Hotstar. With the urban consumer gravitating towards these services, native Indian football content on these platforms remains low.

This is going to be highly critical over the next few years as digital is taking over the broadcast space as evidenced by La Liga streaming El Clasico on Facebook. We are bound to witness a huge spurt in content and live sport being made available to the masses through not just clubs but also through broadcasters and other media companies, who will surely be looking to capitalize on the potential engagement levels that football can reach.







STRENGTHS:

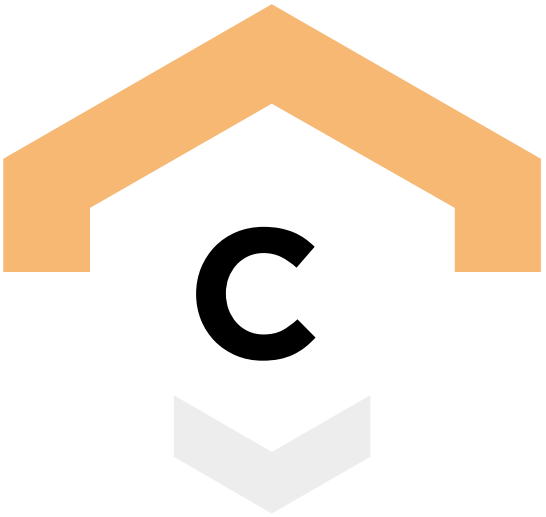
- ISL broadcasted in multiple local languages as well as in countries beyond India
- Significant increase in quality of production along with access to games on digital platforms
- Independent content creators have emerged who are helping drive eyeballs towards the broadcaster
- The popularity of ISL has led to increased demand of other football competitions featuring clubs and national teams

WEAKNESS:

- Football competes with other entertainment options available including TV soaps, other sports and game shows
- Off field content outside of the 90 minutes is not engaging enough

GIVEN THE LEVEL OF FOOTBALL CONTENT AVAILABLE IN THE COUNTRY CURRENTLY, THERE LIES A CHANCE FOR CREATORS TO PRODUCE BETTER-PACKAGED BROADCASTS. REVENUES FROM LOCAL BROADCAST DEALS REMAIN AN IDEAL SOLUTION FOR STATE LEAGUES. TIE-UPS WITH STREAMING SOURCES MAY PROVE BENEFICIAL IN THE FUTURE.





OPPORTUNITIES:

- Advertisers get a cost effective opportunity to reach similar numbers as other marketing activities due to the broadcasters
- Football broadcast provides added advantage for on-field advertisers which feature in the coverage
- Huge opportunity for independent content creators subject to content being made available
- Opportunity for clubs to collaborate with the broadcaster to create club specific content and use the same for promotion and revenue generation
- Sale of broadcasting rights to foreign partners, given the diaspora of Indian population worldwide
- If and when the TV rights are auctioned, there is a huge opportunity for the league and its stakeholders to monetize

CHALLENGES:

- To ensure the availability of content for independent content creators
- Access to off-field content for clubs to utilise for their own purposes
- Capturing the demographic consisting of non-football fans or non-Indian football fans

“IF SPONSORSHIP IS A VEHICLE, THEN ACTIVATION IS THE FUEL THAT MAKES IT WORK.”

- SIMON CHADWICK

SPONSORSHIP

I. FACT SHEET
II. EXPERT OUTLOOK BY PROF. SIMON CHADWICK
III. ROAD AHEAD
IV. SWOC ANALYSIS FOR BUSINESS



3

APPROX ANNUAL SPONSORSHIP IN FOOTBALL IN INDIA



280 CRORES

ANNUAL STADIUM ATTENDANCE IN INDIA



22 LACS

ON GROUND SPONSORSHIP IN FOOTBALL (2017)



179 CRORES

INCREASE IN ON-GROUND SPONSORSHIP IN FOOTBALL FROM 2016 TO 2017



64%

GROWTH IN ISL TEAM SPONSORSHIP



22%

MANAGING SPORTS SPONSORSHIP – THE PAST AND THE FUTURE



SIMON CHADWICK
Professor of Sports Enterprise & Director of Centre for Sports Business
University of Salford, Manchester

Professor Simon Chadwick is a researcher, writer, consultant, speaker and academician with almost twenty-five years of experience of working across global sport. Huffington Post identified him as being among the world's top-30 most important sports marketers; The Independent ranked him amongst its top-10 most influential business people on Twitter; and The Times described him as Britain's 'guru of sport management'.

Sports sponsorship has a long history, with some commentators suggesting its origins can be traced back to Roman times. Then, gladiators were often taken care of by benefactors who would provide food and shelter in return for the glory of them being associated with fighting men.

Modern interpretations subsequently, and initially, equated sponsorship with philanthropy and the promotion of good causes. However, as the North American model of sport began to strengthen during the mid-twentieth century, sponsorship became a more commercial activity.

During this period, for companies and brands, sponsorship became a form of marketing communication, good for raising brand awareness and enhancing brand recall. For sports properties such as teams and events, sponsorship principally became a source of revenue.

In this form, sponsorship effectively became a business transaction characterised by an exchange of legal rights in return for a fee. Indeed, one definition of sponsorship from this era identified how sponsorship involved the provision of assistance, either financial or in-kind, to an activity by a commercial organization for the purpose of achieving commercial objectives.

This proved to be a limited and limiting interpretation of sponsorship, and we have thus seen a new view of sponsorship emerge over the last two decades. This has variously positioned it as a form of strategic collaboration, a means through which to build business networks, and a vehicle for generating shared value.

As such, now sponsorships are sometimes utilised as the basis for both sponsor and property working together to target key consumers; for jointly developing new goods, services and experiences; and for co-promotional and collaborative

business development activities. In turn, social media and digital developments are creating new opportunities for both parties to work together.

There are no rules about the view of sponsorship that either a sponsor or a property should hold. However, one of the failings often associated with managing sponsorships is that parties involved in them may often be unclear about, or else have a poorly developed notion of, why they are engaged in a sponsorship programme.

This immediately raises an important issue facing sponsorship managers: what are the reasons for utilising sponsorship, and what goals might one set for a sports sponsorship programme. Some practitioners assert that modern sponsorships must be conceived of in terms of being solutions to perceived business problems.

In essence, this implies that 21st century notions of sponsorship demand that any investment in it must deliver a positive return on investment (ROI). In turn, this further implies that companies and brands must know why they are spending money on, say, a cricket or football shirt deal, and what they hope to achieve from it.

From such decisions, next a sponsor needs to identify the audiences a sponsorship is being targeted at. Typically, sponsorships as a form of marketing communication have been B2C relationships whereby a company seeks to promote its products amongst consumers who might buy them. However, sponsorships can also be B2B in form, such as in motor sport, and even governments can be involved (for instance, in the case of Russian Gazprom's deals with UEFA).

Having initially clarified such matters, the next challenge for companies and brands is to implement and manage their sponsorships. Such matters are inevitably premised upon what, why, how and when, though understanding how to activate a deal is arguably the biggest challenge facing those involved.

If sponsorship is a vehicle, then activation is the fuel that makes it work. Essentially, it is the additional amount that needs to be spent to leverage the maximum benefit from the contractual value of a sponsorship deal. The money can be spent on all manner of things from promotions to advertising to direct marketing. Some commentators believe that for every dollar spent on contract value, another dollar should be spent on activation.



Others believe that whatever it takes to activate properly should be spent.

As a final stage in the managerial process, evaluating the effectiveness of sponsorship is paramount. Yet this has proved to be a tough nut to crack, especially establishing and measuring the direct link between sponsorship and sales. With debate raging about on gauging ROI, it does rather imply that a company's initial setting of objectives is an important driver in the measurement of effectiveness.

It is in the area of ROI that sponsorship currently faces one of its biggest challenges. Some question whether it represents good value for money, circumspection that was prompted by the global financial crash ten years ago. This brought into question whether sponsorship spending is wasteful, leading some to suggest that it often delivers less than it costs. Today's sponsorship managers must contend with this legacy and provide a compelling business case for spending.

Adopting more innovative, creative approaches to sponsorship is thus on the agenda for the sponsorship industry. This has given rise to a view of sponsorship that accentuates its role in creating unique, tailored, value-adding experiences for consumers. Nevertheless, a rudimentary challenge still exists: that sponsorship managers must understand the motives, attitudes and behaviours of target audiences. Sponsorship psychology is key in addressing this challenge.

Yet these are complicated times; products, audience and markets have globalised, and consumers have become more sophisticated. In addition, the emergence of social media and digital technology has brought about all manner of opportunities for sponsors and sports to work together, whilst at the same time adding to the complexity of making sponsorship decisions. One way to address this is for sponsorship strategists to adopt a data-driven approach to decision making.

In spite of the challenges, sponsorship remains a high profile, attractive and much sought after opportunity. However, this can mean that sponsors are often exposed to a level threat that other forms of, for example, marketing communication do not. Ambushing is one such threat, online trolling is another. Hence, if a brand is to protect against rivals and antagonists wrongly, possibly illegally, appropriating value from an official sponsorship, sponsors must know how to protect their investments.



ROAD AHEAD

BY EDITORIAL TEAM

Potential sponsors in the domain of Indian football seek to invest in the national leagues and the teams playing in them.

Invariably sponsors use a simple matrix to determine the worth of their sponsorship. The matrix involves the cost per eyeball along with its correlation to the relevance of such eyeballs. Once these initial matrices have been crossed, it is necessary to create deliverables for the sponsor and showcase the reach and relevance of each created deliverable.

In India at present, data with relation to the exact reach and relevance of Indian football related content remains sparse. We have not been able to fully analyse the available data nor have we been able to collect adequate quantities of data for such analyses. This in turn, results in a situation where the sponsor is putting in the money for the air time it receives rather than the engagement or pull from the club it is associated with. As a result, it is very difficult to show the tangible benefits to the sponsor for a long-term association.

The targets for sponsorship are to achieve higher worth and relevance from the acquisition of an end user vis-a-vis the investment required to acquire the end user. Social media following and in-stadia attendances are two of the starting data points for sponsors to consider an investment in either a team or a league.

Clubs and other football-affiliated organisations may also seek sponsors for isolated events and community campaigns that they seek to hold during the season or prior to it. The organisation of such sponsor-funded activations/campaigns in turn strengthen the image of the football club as a year-long and a well-rounded product, thus furthering its appeal.

Currently, the two leagues cover the length and breadth of the country, with over 10 states represented by the teams involved in national competitions. Increasing the length of engagement as envisioned by the proposed one-league model makes the top tier an interesting prospect for sponsors to invest in. Along with an increase in the length of engagement, the quality of native content produced must go up, so as to make it engrossing and worth the end user or the sponsor's investment. With the game now being increasingly followed on social media, various platforms have generated user-driven content to be consumed, besides league-related television content. Long-term deals and cross-platforming remain key areas of focus for sponsorships in Indian football.

Smaller clubs can look to the community model for local sponsors. Building a strong native connect can help leverage hyper-local resources to aid with the functioning of clubs and State FAs. A major fallacy with top-tier clubs lies in the need to look for one large sponsor, instead of several mid-level and feasible sponsorship deals.

In the absence of many teams owning their own stadia, the issuing of naming rights remains an avenue for the future. State FAs though, could utilise the recent push for a PPP model in stadia by giving out naming rights.


MARATHON BET
GIRONA FC
ORGULL GIRONÍ
ESTRELLA DAMM
umbro
GIRONA FC
Coca-Cola





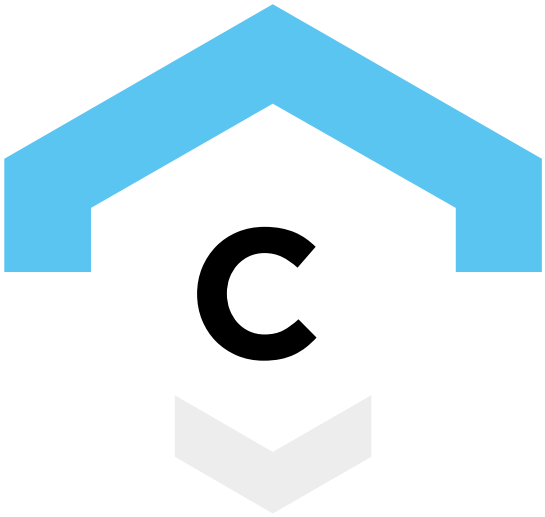
STRENGTHS:

- The fact that the commercial rights for Indian football are owned by Reliance (India's biggest company) gives confidence to potential sponsors to associate with the league
- Wide variety of sponsorship opportunities are available throughout India for regional and national sponsors
- Given the rising status of Indian football in India, sponsorship opportunities have not yet been inflated
- Large global companies like Hero, DHL and Maruti have committed to multi-year deals, thus improving sponsor sentiment

WEAKNESS:

- Limited activations done by participating clubs to give sponsor brands more visibility
- In-stadia cost per eyeball is not justified for sponsors of many clubs due to poor stadium attendances and television viewership also does not provide a lucrative return
- Shorter league durations do not entice bigger sponsors to associate with the league





OPPORTUNITIES:

- Sponsors can look to associate with structured state leagues to justify cost per eye ball as well as build brand loyalty
- Brands have started associating with footballers for promotional campaigns. There is opportunity for larger brands to come in and undertake targeted campaigns
- Sponsors looking to support social causes can support baby leagues and women's football to ensure a wider community outreach especially in the rural/peri-urban football pockets of the country

CHALLENGES:

- Weekday games schedule at hours where the viewership is not very high and won't give the sponsor the promised visibility
- Lack of both quantitative and qualitative data especially for state leagues is a challenge for sponsors to justify their support
- Over the years, sponsors have committed a significant amount of funds in leagues but the ROI is difficult to gauge in the absence of a clear roadmap pertaining to the league pyramid in India

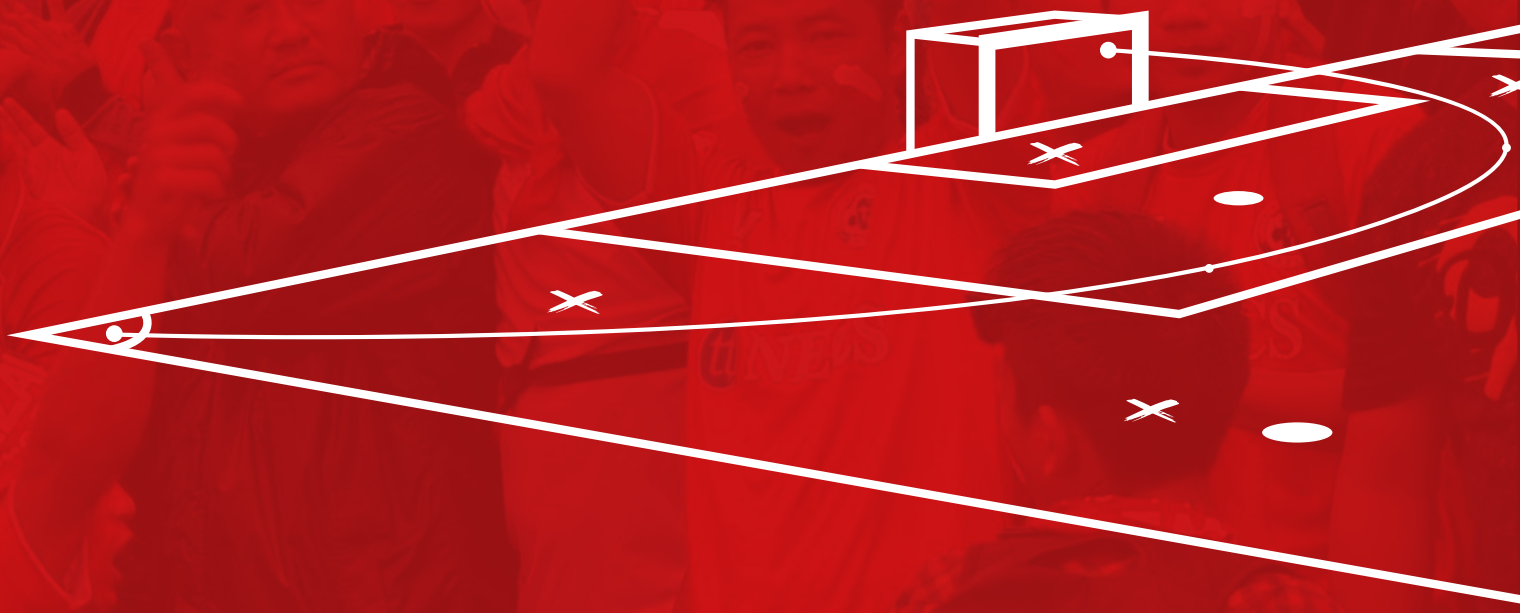
WITH AVENUES FOR SPONSORSHIP CONFINED TO LIMITED SPACES, THERE LIES A HUGE UNTAPPED MARKET IN THE URBAN AREAS. TARGETED CAMPAIGNS ARE YET TO BE WITNESSED IN THE INDIAN MARKET.

“I CAN’T IMAGINE THERE ARE MANY RIGHTS OWNERS OUT THERE WHO STILL NEED CONVINCING THAT DATA IS IMPORTANT TO THEIR FUTURE.”

- FIONA GREEN

FAN ENGAGEMENT

I. FACT SHEET
II. EXPERT OUTLOOK BY FIONA GREEN
III. ROAD AHEAD
IV. SWOC ANALYSIS FOR BUSINESS



IN-STADIA ATTENDANCE INDIAN SUPER LEAGUE

13,222

IN-STADIA ATTENDANCE I LEAGUE

11,395

FACEBOOK FOLLOWERS (Leagues + Clubs)

12.5 MILLION

TWITTER FOLLOWERS (Leagues + Clubs)

5.6 MILLION

INSTAGRAM FOLLOWERS (leagues + clubs)

2.7 MILLION

State leagues witness poor turn-outs, with the exception of the Calcutta Football League and the Mizoram Premier League, both of which attract audiences in excess of 3,000

WINNING WITH DATA – CRM AND ANALYTICS FOR THE BUSINESS OF SPORTS



FIONA GREEN
Co-founder
Winners

Fiona Green has operated in the sports industry for over 30 years including 3 years in the US during the 1994 FIFA World Cup and 3 in Switzerland. Her vast experience has predominantly been agency-side representing rights holders in sponsorship, TV rights and merchandise/licensing. She recently published a book with Routledge - Winning with Data: CRM and Analytics for the Business of Sports available on Amazon. The book was nominated by the publishers, Routledge, for the FT.com Best Business Book of the Year award.

CRM: AN INTRODUCTION

In this digital world people happily tell us what they're doing through their online activity and social media posts. We can see what they're doing through behavioural analytics and when we analyse all the data available to us, we've got the closest thing we're ever going to get to a crystal ball.

That's the theme of this book – that we can now engage with people at a very deep and personal level, giving us the ability to tell them what they want to hear at a time when they need to hear it. This in turn increases the chances that these people – our customers, fans or other stakeholders – will then do what we want them to, whether it's to spend, review, participate or interact. When discussing this subject with Adrian Wells, Marketing and Communications Director for the Cricket World Cup 2019, he confirmed that the importance of data will be critical to the success of the tournament and will be looking for appropriately skilled people:

"Data will underpin the Marketing, Communications and Ticketing department to ensure we are laser focused on our fans and driving engagement and ultimately purchase," said Wells. "When recruiting the team to deliver the plans, a detailed understanding of CRM and leveraging data is a core skill set I look for in every team member. I believe this will be a common approach across the sports industry in the future."

WHAT IS CRM?

At Winners, the company I founded over five years ago to support the sports industry in this area, we define CRM as 'getting the right message, to the right person, at the right time'.

But what about the right platform? In a world where the term omni- channel is universally used and disliked in equal measure, we don't feel the need to refer to channels or platforms individually because the world is now channel-blind. We switch from email to Facebook, Twitter to Snapchat, Instagram to Pinterest, and mobile app to desktop without a second's thought. We don't care about the channel; we just want the message, content, or interaction. It's implicit that we know what channel to use.

So, we've got the right message, the right person, the right time and the right platform. It is now left for us to make sure these messages work to achieve our business objectives. Unlike many other industries, sports organisations are not all about selling. The original meaning of CRM, coined back in the early 1990s, was about B2B (Business to Business) software; they were programmes that helped sales reps stay on top of their leads as they moved through the sales process, from initial contact to signing a contract. This has led to CRM strategies and processes focussing on sales; selling larger quantities, cross-selling, selling more efficiently, and predicting how sales can increase.

Operating in the sports industry however, we're acutely aware that the primary business objective isn't always to sell. Sometimes the focus is on increasing participation, demonstrating governance and improving reputations. While we know each of these will indirectly bring financial reward, the approach you take to upgrade a fan who has bought a ticket, or one who might spend more for a VIP experience, can seem very different to how you would encourage a retired player to become a coach, or a parent to become a volunteer. But, despite the different end goals, these objectives utilise similar CRM processes that promote engagement in all its forms, and it is this that leads to the desired end result.

WHY NOW?

The sports marketing industry has been around for many years. While the 1984 Los Angeles Olympics holds claim to being the first US event to generate broadcasting fees, the to-the-death arena fights of ancient Rome could also be considered a foundation to what's now a multi-billion-dollar global business. Regardless of whether you believe the catalyst was our first formalised approach to commercialising an event, or wealthy aristocrats sponsoring gladiators, why has CRM become so important to the sports world that it now deserves its own book?

THE SPORTS INDUSTRY IS FACING A LOT OF CHALLENGES:

1) We're not turning out. MLB (Major League Baseball), NFL (National Football League), Test Cricket, French Rugby, NASCAR, the BNP Paribas Open, to name but a few, are all suffering declining audiences.

2) Our attention spans are shortening. According to a 2015 study by Microsoft, the average person's attention span, thanks to our growing dependence on technology and social media, is now just eight seconds – less than that of a goldfish, and less than the 12 seconds it was at the start of the millennium.

3) We're participating less. In the UK, the number of people playing sport or exercising has decreased since the London 2012 Olympics and, across the Atlantic, the Sports and Fitness Industry Association reports that inactivity among children has nearly doubled since 2015.

4) Customers want more. Thanks to the amount of information that's available to us on any one of our connected devices, we have multiple options, so when we select one we expect it to meet our expectations.

Whether you have 2,000 or 200,000 fans, they're all individuals with different wants and needs. They expect you to know them. According to global CRM software



brand Salesforce, 63% of millennials will share their data in return for personalised offers and discounts. They expect tailored recommendations and offers.

But, despite these challenges, there are also many opportunities. This is where I see CRM playing a huge role in shoring up our business models, helping us secure financial sustainability and ensuring we don't have to rely on our performance on the field to ensure performance off it.

We have passion. Lots of it. Sports can move fans to tears of joy or sadness. While global consumer brands from Coca-Cola to Visa have to pay for media attention, conjuring up story-lines when launching a new product, a club can announce a new signing, an athlete can produce a personal best and their fans on the other side of the world will be discussing it before a web page has time to load.

We have natural loyalty. While any one of the individual companies in the FTSE 100 could purchase all the football clubs in the English Premier League, they can't buy what Arsenal, Chelsea and Everton have in abundance – loyalty. Of course, it's not just elite football. Worcester Warriors, Glamorgan Cricket, Team GB, the All Blacks, the Wildcats (to name just a few), all have fans that would go without food before they would go without their season ticket. Barclays and Bank of America, Marks & Spencer and Home Depot, Tesco and BestBuy, Vodafone and Sprint can only dream of that kind of allegiance.

We don't have to buy column inches, likes, re-tweets and follows. Whatever your frame of reference, when a club announces a new midfielder, quarterback, pitcher or bowler, the media have dissected the decision before the athletes have chosen their lockers.

We have an abundance of content. We don't need to hire PR teams and ad agencies to conjure up stories and create narratives. We create images that are shared at the speed of light and memories that truly last a lifetime.

The use of CRM has proven to be so powerful in building customer loyalty for companies who don't have half of what the sport industry has naturally, that we believe when we truly embrace the use of data the impact will be significant. We'll win back our audiences, get more people on the field and remain our fans' number one choice when it comes to their focus, attention and share of disposable income, because we'll be giving them what they want.

CASE STUDY: UEFA

The fundamentals of CRM in the digital age can sound relatively simple: getting the right message to the right person at the right time. But for sports organisations in particular, the media revolution that has enabled a vast and rapid extension of their visibility, popularity and reach, has also made that task an increasingly challenging one to accomplish.

With membership spanning 55 countries, a database of 21 million fans and an ambition to continue accelerating its current trajectory of commercial growth, European football's governing body UEFA is a prime example, not just of the complexities that sports organisations face in building one-to-one relationships with their supporters, but also of the processes they need to adopt in order to succeed.

This case study demonstrates some of the thought processes that UEFA had to go through when adopting their own approach to CRM.

STAKEHOLDER RELATIONSHIPS: CRM IS NOT JUST ABOUT THE FANS

UEFA has had a clear vision for its CRM goals since it started developing its capabilities in the field in 2014. It faces on-going challenges in having to align its objectives with the interests of three important stakeholder groups: members, sponsors and media partners.

Peter Willems, Head of Marketing Activities and Sponsorship in UEFA's Marketing Division had the following to say: "Delivering the right

message to the right person at the right time is primarily an issue of knowledge. It is only by understanding the customer, their habits and preferences, that the organisation can determine what sort of offers a customer will best respond to and identify the moment at which they will be most receptive to them."

To achieve the necessary level of customer knowledge, Willems talks about how UEFA has placed a strong emphasis on the quality of its database and the number of data points it can track: "While new communication and engagement channels may emerge and consumer behaviours will inevitably evolve, the building blocks of UEFA's CRM strategy will remain the same with a focus on data, content and channels."

For Willems, these three elements create a circle in which channel access to compelling content yields data insights that can improve and be repeated (almost) ad infinitum.

DATA IS THE NEW OIL

Within the sports industry we have an incredible amount of data at our disposal, and digitisation is producing even more. Rights owners that want to stay ahead are now becoming data-driven businesses. We use data to derive insight that informs decisions and ensures that we know who our current and future customers are, where and how they live, what they like, what they don't like, what they want from us and, most importantly, what they'll do for us.



However, it's important to accept that while data has immense power, we must also combine this with what we already know about our fans and the way they behave. Amie Becton-Ray, the NHL's (National Hockey League) Director of Database Marketing & Strategy, gave us her view of the way we use data: "The thing about sports is it's a very emotional business. Our fans are passionate about their team; they really care about them so if their team is doing well then everything is great, the website works wonderfully, the emails they receive are fabulous. But if their team loses, then there's less satisfaction with the brand as a whole. So while I agree that data is extremely important in decision making, we still always have to factor in emotion." Becton-Ray went on to say: "A great example is our All-Star Fan Vote. Every year we step back and look at the programme's analytics and metrics and think about how to improve the experience and engage fans. One year we allowed fans to vote 30 times a day, but the data showed us most people voted once. So the next year we implemented a 10-vote limit (seeing that 30 was unobtainable, and knowing that our fans do like to vote repeatedly for their team's players); that year, most people voted 10 times each day they voted."

As Becton-Ray concludes, "It is important to use a combination of what we know about our fans and what we are continually learning from the data in order to formulate the programmes that make the most sense, that we think will be the most effective. And then we test and learn, and tweak things as we go."

CONCLUSION

I can't imagine there are many rights owners out there who still need convincing that data is important to their future. In reality, data is really just another word for information, and undervaluing the need for information in a business would be reminiscent of the film companies who underestimated the threat from digital photography, and the video rental companies who initially ignored growing interest in online streaming services. However, I suspect there are many that still haven't taken charge of their data, so this book is dedicated to you in an attempt to simplify the subject, help you understand some of the key areas of focus, and provide a way to navigate the many points of consideration.



ROAD AHEAD

BY EDITORIAL TEAM

Fan engagement plays a huge part in the brand building of a football club and league. Spectators also drive most modes of revenue that include:

I. *Merchandise sales*
II. *Gate receipts*
III. *Broadcast Revenue*
IV. *Sponsorship*

In India, apart from a few clubs, most others have not been able to convert the fan following that they witness on a regular basis into monetary rewards for the club.

With the novelty factor of newly-introduced brands wearing off over time, the connect of a club to its local supporter base remains pivotal.

This connect is achieved through both on and off-field activities. The fan often identifies with certain key individuals or players within a team. Community engagements between the fans and the players open clubs up to the supporters to forge a bond with. It is important here for stakeholders and authorities to come in and understand the culture of a footballing region and the pulse of a fan to create and engage in a way that is in line with the ideals held by the target audience.

Scheduling of games is an area of concern in Indian football. Games are often weekend activities for spectators, akin to movie-going. An excess of weekday scheduling is likely to put off broadcast audiences as well. Timings, climatic conditions, ease of reach and returns are important factors in scheduling as well.

In-stadia attendance remains an important indicator in determining whether teams have been able to capture the narrative in their immediate surroundings. Starting small and continuous engagement are pillars to establishing a medium-to-long term growth in fans who not only attend first division games but also attend the matches of affiliated reserve and youth teams.

Fan presence in the full stadiums across Argentina, Brazil, Chile, Mexico, Uruguay and Latin nations in Europe have a direct link to their active participation as kids in the sport. Having a rich upbringing in the sport results in viewership and compels or motivates people to get up and go watch them play. This could be years and years of just watching the game.

Basic improvements in the area of match-day experience will help clubs achieve attendance targets.

Focusing on the identities of fans who engage with the club in person on match-days or online is important in shaping the identity of its supporter base. Football fans are often involved in similar interest groups, and pursue off-field activities together.

The cost of supporter acquisition at the start of every season can be reduced with clubs stepping up their activities throughout the year. Creating and sustaining the connect with supporters during off season remains pivotal for the clubs to turn into institutions.





STRENGTHS:

- India is one of the world's biggest sports fanatics especially consuming football from all across the world
- Indian populations' digital presence has been rising exponentially with more people consuming engaging online content on a daily basis
- Leagues are expanding every year with new teams over-achieving season on season thus creating a new set of fan bases
- A lot of agencies and individual content creators have sprouted as a result of the massive boom in the digital space

WEAKNESS:

- Fanaticism and engagement is only limited to cricket
- Lack of engaging content for the fans in terms of off field persona of the players
- Limited dedicated fan groups
- Lack of data collection or efforts to profile and understand the Indian football fan's behaviour trends



OPPORTUNITIES:

- Given the passion for football in the country as well as the percentage of the population that consumes football, there is a major opportunity to drive fanaticism to football from other sports
- Youth in India form a major part of the consumers of content both on TV and digital platforms. There is a massive opportunity to engage with these fans via provision of quality content
- With rising digital literacy in the country, there is an opportunity to engage fans digitally, understand behavioural trends and plan targeted and customised marketing strategies

CHALLENGES:

- There is no concrete plan or structure in place to drive fanaticism to football
- Most clubs struggle to convert casual fans into loyal ones, which is also amplified as a result of fan loyalty towards global clubs
- Absence of data collection on predefined indices that can help stakeholders influence decision making for better content and fan engagement in football

A MAJOR OPPORTUNITY IN FAN ENGAGEMENT IS TO CREATE LONG-TERM CONNECT WITH THE SUPPORTER BASE, THUS LEADING TO HIGHER ACTIVATIONS. WITH INTEREST IN FOOTBALL LIKELY TO PICK UP, THE FAN NEEDS MORE CREATIVE INPUTS THAN EVER IN ORDER TO DEVELOP A SUSTAINED INTEREST.

“IF THE CULTURE IS GONE THERE IS NO AMOUNT OF INVESTMENT, INFRASTRUCTURE OR COACHING QUALIFICATIONS THAT CAN RESURRECT IT. CULTURE ENABLING IS THE MOST COST EFFECTIVE SOLUTION.”

- RICHARD HOOD

EARLY PLAYER DEVELOPMENT

I. FACT SHEET
II. EXPERT OUTLOOK BY RICHARD HOOD
III. ROAD AHEAD
IV. SWOC ANALYSIS FOR BUSINESS



5

FACT SHEET

TOTAL NUMBER OF BABY LEAGUES IN OPERATION		**228**
NUMBER OF CHILDREN REGISTERED ACROSS BABY LEAGUES		**29,550**
NUMBER OF STATES AND UNION TERRITORIES WITH BABY LEAGUES		**11**
YOUTH LEAGUES IN INDIA		**I-League U18, U15 and U13**
NUMBER OF CERTIFIED COACHES		**9,357**
NUMBER OF CERTIFIED WOMEN COACHES		**300**
TOTAL TEAMS ACROSS AGE GROUPS		**198**
ACADEMIES ACCREDITED		**60**
LATEST NATIONAL TEAM RESULTS		AFC MEN'S SENIOR: Group Stage AFC U16 MEN: Quarter-finalists AFC U19 MEN: Not Qualified AFC U23 MEN: Not Qualified AFC U16 WOMEN: Not Qualified AFC U19 WOMEN: Not Qualified

UNDERSTANDING TALENT



RICHARD HOOD
UEFA 'A' License Coach
and Former Head of Player
Development at AIFF

Since 2007, Richard has developed an expertise in elite player development through his deep understanding of the game in the Indian context coupled with his academic pursuits, research and insights from the very best environments overseas. His work at Vasco Sports Club, Tata Football Academy and Bengaluru FC have had consistent themes of homegrown players, community and school based competitive engagement and coach development. His training methodology and game philosophy have contributed to the development of some of the best young players today. His time at the AIFF was led with an intent to promote early player engagement and hyper local region specific ecosystems which led to the introduction of the 'Baby League' concept while actively presenting the development history of Indian football to educate stakeholders on the needs of the future.

Our approach in understanding what talent is and how we can produce it has led many stakeholders down the pathway of replicating training models that prevail overseas. This is seen in knowledge sharing through tie-ups, operating intensive residential set-ups, exporting players for exposure visits, and importing coaching expertise to script the catch-up game that begins at the age of 13-15 in most development setups across the country.

In the global context, the development journey in relation to our catch-up game begins far earlier with regard to the age at which players are introduced to the game followed by the upbringing or development which takes them through a rich, wide and deep range of experiences in free play, supervised training, accumulating supplementary training hours independently and the crucial missing link of regular competitive engagement.

These experiences are enveloped by unique levels of regional, cultural, economic, social and historical influences that outline the volume of engagement, how early or late they specialise, family, access, the standards of play, the sophistication of facilities, expertise of coaches, ethics and principles and the game aesthetics or 'identity' that is encouraged. In the midst of these complexities, we see players emerge to play at the highest levels of the game from all corners of the world. In light of this context, we have an opportunity to challenge ourselves and interpret the development of a talent as a result of the demands placed on an individual's potential by the environment and their ability to effectively interact, respond and adapt to cope with these demands.

A GAME OF NERVES

The level at which a player competes is a direct reflection of the relationship between the skills that they exhibit and the nervous system that serves them.

The future of the game will continue to develop players that can function through a perception-decision-action loop with increasing quickness, precision, consistency and quality in execution. From the first time a player observes the game as a toddler, experiences how the ball behaves when they make contact with it, the first game, the first training session, they become sponges of information and feedback where they develop a database for all these interactions with the game. These interactions are guided by two environments, the internal and external. The internal environment is the mind and body of the players. In the mind, the player develops a connect that directs their distinct emotions, behaviour and personality. This connection creates biases towards specific aspects of the game. These biases eventually become preferences on how and where they would like to play.

The preferences are then complimented with intelligence, an ability to focus and decipher game situations by employing their intelligence and commitment to get better at what they want to do. Physically the players continuously learn how to effectively apply their attributes such as speed, strength, stature to successfully influence a game situation. The challenges placed on these attributes go through changes as they mature and play at varying levels where this growing awareness in the strengths and limitations of their physicality, technical ability and coordination starts to impact on how they operate within a game. The external environment can be interpreted as the ball, the surface, climate, coaches, teammates, opponents, culture, climate, opportunity, access that start to frame his internal connections and game based preferences to suit the needs of the team and game situation.

The external environment, in the sociological sense, is far more influential as we start to understand the contribution of the home where the player grows up, the number of siblings they have, distance from a pitch or club, the quality of informal play they engage in, the formal competitive systems they are a part of, the amount of football they watch, idols and local heroes, encouragement, extent to which the game can change their reality and pathways to progress. Repetition of these internal and external interactions in a holistic way engages and challenges the player's intelligence in the game, conditions their physiology, shapes their emotional control and sharpens their technical execution. To cope with these challenges, the players rely on their perceptual skills to gather information and transfer them between the brain and muscle through neurons.

These neurons are the creators of any human skills as they trigger tiny electrical impulses that employ nerve fibres or axons to create a desired execution of action or skill. Repetition of the environment or situation, in which a specific chain of nerves are triggered, creates an insulating layer called Myelin. Myelin sheaths



wrap and form a layer resembling a telephone wire around the neural chain that processes information and increases with repetition, more so with purposeful repetition of the skill. The thickness of this insulation influences the strength, speed and precision of the signal between the body and mind to interact with the game situation.

A highly-myelinated player processes game information and executes appropriate actions with more speed, clarity and reliability than an amateur player. It is here that the argument for early player engagement strengths, as what studies suggest is that the myelinated fibres in the periphery increase to about 90 percent of their adult size in the first 5-6 years and growth of neural systems slows down from 12-13 years of age. Further studies have found that myelin supports executive function, working memory, intelligence through its influence on processing speeds. On the slow-down of the neural systems the player starts to depend on the refinement of the neural networks and brain regions supporting performance through anticipation. The players rely on the database of millions of prior interactions or experiences and match them with play as it unfolds in front of them.

This rich experience and ability to pick out the right information specific to their task, their ability and team understanding helps them cut through the clutter of information and focus on the right details such as posture, movement, positioning, tempo to create a heightened sense of anticipation and prediction in order to function at a higher pace with extreme precision. Technical ability, high levels of athleticism and motor control allow the player to match their intentions with actions and the most sophisticated brains in the game have the ability to change/adapt their perception focus and change their action as new information emerges at the very last moments. In our context, we can start to see the results of our talent pool being engaged in a slower paced game culture, adhering to a lowered sense or benchmarking of what is interpreted as elite, meaningful competitive engagement for no more than 3-4 months, diminishing playing spaces and irregular access to the sport as a key cause for not having any Indians ply their trade in the top leagues of the world.

THE FUTURE

The last thing we should encourage is a race to the bottom to cash in on the myelination and peak learning phases of young people and subject them to an intensive, single sport set-up. When we look back at the internal environment of the player, it is easy to identify the emotional connect that funnels all the traits that are required to stay involved in the sport. We face a challenge with ever-decreasing activity and fitness levels. This is later seen in high dropout rates. Keeping in mind that the progression from elite youth to earning a living from playing the game for a decade is less than 0.05%, we have a duty to flip the script and build the base of participation that serves the community, locality and a whole generation through an environment that makes the game attractive and sparks a lifelong enthusiasm and connect.

Academies and clubs all across the world that have a single sport culture where they play football all through the year are rapidly working towards the development of fundamental movement skills to create a fitter and better athlete, there is also a drive to delay specialisation or initiation into the formalised training models that are aggressively curriculum and outcome driven and rely on illogical player selection models. Bring back street football is the call that is growing louder all over the world. Our youth competitive circuits have increasingly become adult versus adult through the kids, we start to recognise that the scoreboards are not as big a problem as the adults are. By placing the players and engagement process before everything else, stakeholders are urged to not think about the social media driven numbers game and introspect on the intent of their programmes.

The mission and vision statements have to go far beyond developing technique, or improving fitness, creating future professional players or contribute to the national team. Given the percentage that last the journey from the first touch to becoming professionals, the best of the best will find their way to the top with countless stories of what could have been along the way.

The bait has to be a clear sense of the game identity that you would like to encourage, driven by a deep understanding of what motivates, challenges and engages players, a strong set of values and principles, creating communities around playing the game across all ages that ensure the youngest players want to come back to the game week after week and build a strong sense of self-efficacy to channel their energy, enthusiasm and confidence. Indian football is in need of stakeholders enabling and empowering hyper-local ecosystems that go beyond running a single club or academy that trains players to compete and shift the focus on a broad base of multi-tier, multi-age group engagements that operate all through the year meaningfully engaging players of all abilities and backgrounds.

We continue to see players from North east emerge and fill the rosters of youth teams across the country. The regional, cultural and social values in this region engage the population from a very young age. Their early development years defy the lack of facilities, coaches and sophisticated knowledge with meaningful engagement under wisdom, experience and know how where the external environment demands that they adapt at a faster rate than in most part of the countries. Observing that the once-thriving hotspots for talent in the country are now failing to contribute to the game at the highest level, we find the culprit in a rapidly-weakening culture, community and society that no longer serves the game with the commitment, passion and selflessness it once did. The North East effectively replaced these hotspots.

If the culture is gone, there is no amount of investment, infrastructure or coaching qualification that can resurrect it. Culture enabling is the most cost-effective solution that is on offer to the stakeholders. As with every other region, the processes in the North east have to improve significantly to create a better base of players by enriching the culture to create faster, sharper and more demanding game interactions.

The pitch here is simple, while the demands of it are difficult in a world that craves immediate gratification, wants to understand everything through a one-pager, elevator pitch, 'no more than 5 slides' approach. To understand development is to understand culture and we can achieve that by zooming out from the focus we place on curriculum, qualifications and facilities in our largely Euro-centric approach. We must start to look for answers in what happens at the macro level in countries that share a social, cultural and most importantly economic context similar to our own and study the upbringing and experiences of players across the span of their development cycle. We will find that many players make it to the top growing up in facilities far worse than ours, under lesser informed or qualified coaches and in the absence of a book guiding what they do. By understanding what the players really need we will find that the demands are patience, simplicity, thoroughness and resolve to commit to a 12-15 year period to create players.

ROAD AHEAD

BY EDITORIAL TEAM

Early player development is also greatly aided by the access to games between the ages of 4 and 13 years. Children in the most advanced footballing countries play an average of 40-plus games every year and at least 300 games of varying formats, intensities and standards by the time they have turned 15. This is arguably the most important facet in the creation of an elite footballer.

A significant gap remains in the technical ability shown by Indian youth footballers and that of their counterparts in Asia's highest-ranked countries. This gap in youth player development can be reduced with a holistic understanding of the talent handling process.

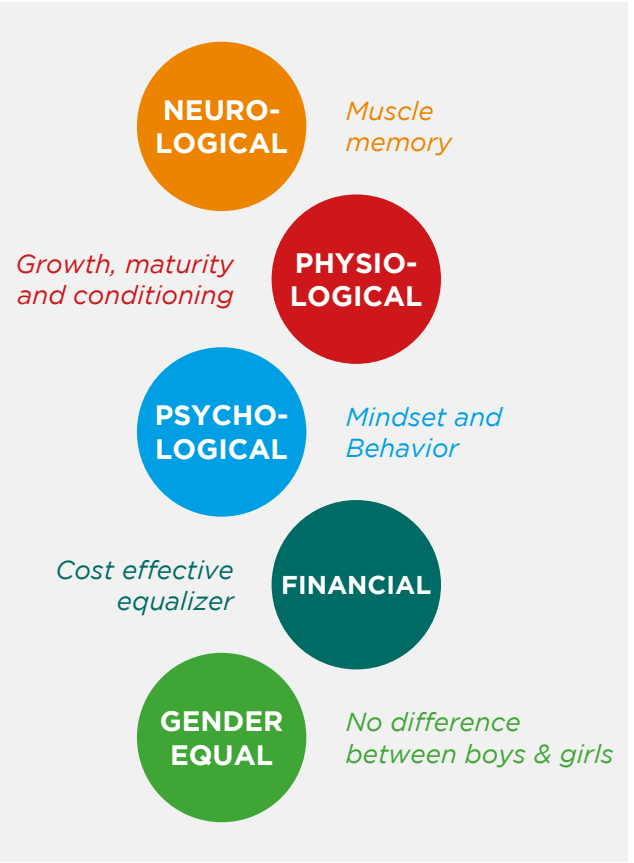
The Indian model, given the shape and size of the country, should make room for youth teams to play at least 70-80% of their matches at the state and district levels, in an effort to increase playing time. Documentation of data from these games and easy access to this data will help with the talent identification process at the apt moment of a player's career.

The introduction of 'Baby Leagues' by AIFF seeks to make up for the paucity of monitored games at the youngest levels. It remains Indian football's most important project and the one to be persevered with.

It also marks an important stage of the pathway for young footballers towards joining academies or youth set-ups. Collaborations between schools and institutions to organise and play leagues within a 5 km-radius could ensure that there are fewer talents slipping through the cracks.

Coach education remains an important part in the moulding of young footballers. The introduction of the vernacular coaching courses remains an important milestone for the future, in order to fulfil the need for coaches at the local levels.

A study and review of grassroots programmes require a deep rooted understanding of a lot of parameters an in order to achieve the best result, utmost focus should be given to the indicators associated with the following parameters:



It is imperative to ensure that all these efforts should not be undertaken in silos and should supplement the efforts of the clubs and the federations with respect to the players at the higher age groups.





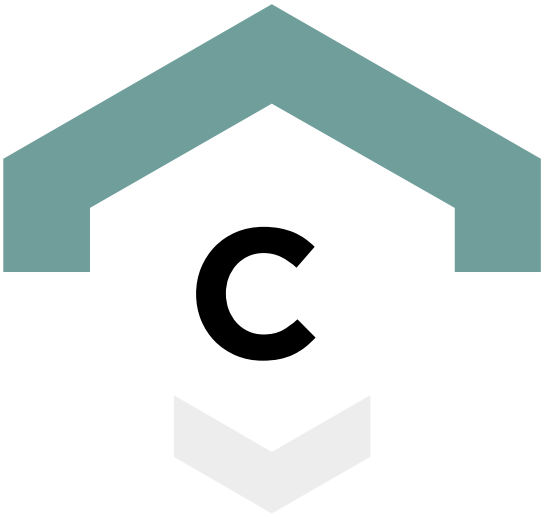
STRENGTHS:

- Advocacy and implementation of Baby League model by AIFF has led to emergence of more than 200 registered leagues across the country
- Popular events hosted by India such as FIFA U17 World Cup and AFC U16 has led to an increase in participation levels both professionally and recreationally
- Parents have increased awareness of early childhood development and thus are encouraging their children to join academies from an early age
- The broadcast coverage of ISL has given extra motivation to youngsters and parents that a career can be made out of football
- AIFF's Baby League mobile application allows for Indian wide grassroots initiatives to be tracked under one umbrella
- The revised curriculum for the Grassroots Leaders course by AIFF is a good step towards establishing qualified coaches and instructors for the future

WEAKNESS:

- Efforts towards grassroots are scattered and disjointed
- Cases of over-age players are rampant in India
- Efforts are geared towards men's football, thus neglecting women's participation levels for early child age groups





OPPORTUNITIES:

- India is one of the youngest countries in the world and thus has access to a huge number of children to tap into
- More and more business conglomerates can invest their CSR funds to support grassroots initiatives that can factor in social causes such as education, health, skill development, women empowerment and livelihood

CHALLENGES:

- Lack of structured pathways from grassroots to age-specific categories
- Lack of enabling infrastructure for grassroots development
- Lack of specialised coaches to cater to young children

WITH THE UNDERSTANDING OF EARLY PLAYER DEVELOPMENT PROCESS STILL RELATIVELY NASCENT IN THE COUNTRY, THE USE OF DATA TO TRACK STATISTICS IS EXPECTED TO GO UP. CLUBS, ACADEMIES AND SOCCER SCHOOLS ALL STAND TO BENEFIT FROM THIS. WITH THE INTRODUCTION OF TRAINING COMPENSATION, ACCREDITED ACADEMIES CAN NOW SEEK REMUNERATION FOR DEVELOPING YOUTH PLAYERS BELOW THE AGE OF 18.

“TALENT IS AVAILABLE, A FOOTBALL INFRASTRUCTURE HAS BEEN PUT IN PLACE, WHAT IS LEFT TO BE DESIRED IS MORE CORPORATES STEPPING IN AND CLUBS CHOOSING THE PATH OF TALENT DEVELOPMENT OVER THAT OF BUYING PLAYERS.”

- GIDO VADER

FOREIGN INTEREST IN INDIA

I. FACT SHEET
II. EXPERT OUTLOOK BY GIDO VADER
III. ROAD AHEAD
IV. SWOC ANALYSIS FOR BUSINESS



ACTIVE AREAS FOR INVESTMENT

Clubs, Equipment, Infrastructure, Grassroots.

INVESTMENT GROUPS IN CLUBS AND LEAGUES

Feyenoord with DDFC, Atletico Madrid with Jamshedpur FC, Bundesliga with ISL, Premier League with ISL, FC Basel with Chennai City FC

FOREIGN SPORTS BRANDS IN INDIAN FOOTBALL

Nike, Adidas, Puma, Admiral, New Balance, TruSox, Umbro

INTERNATIONAL TEAMS THAT VISITED INDIA FOR PRE-SEASON AND MATCHES

Wellington Phoenix, Girona, Melbourne City FC, Bayern Munich, TSG Hoffenheim, Argentina National Team

INTERNATIONAL CLUB ACADEMIES

Boca Juniors, Rangers, Manchester United, PSG, Arsenal, Liverpool, La Liga, Conscient (FC Barcelona), Celtic

A STRATEGY FOR INDIA



GIDO VADER
Manager International Relations, Feyenoord Rotterdam N.V.

A polyglot, Gido bridges the gap between Netherlands and other countries through Feyenoord by strategising development plans, facilitating first team & academy tours/exhibition matches and promoting international co-operation & partnerships. Gido played a key role in facilitating the partnership between Feyenoord and Delhi Dynamos FC in the latter's debut ISL campaign. Over the years, Gido has gained immense experience in player, coach and club relations.

INDIA, A GLOBAL SUPERPOWER

With a population of over 1.3 billion people, India is on its way to overtake China as the largest country in the world. With one of the largest GDPs in the world, massive companies like Indian Oil, Tata Steel, Reliance Industries, Hindustan Petroleum and many more, with a nearly unlimited workforce and an equally impressive potential fan and viewer base, it is no wonder that European and South American football clubs and federations have their eye on it. The potential for creating revenue is seemingly endless, if and when you are able to dig at the right spot. India is the real sleeping giant of international football, but it will not be sleeping for long.

At Feyenoord Rotterdam, we made our first acquaintance with footballing India when we welcomed a delegation from Bhaichung Bhutia Football Schools (BBFS) six years ago. Having just started to actively export our talent development programmes, we were taken aback when we were first approached by them. A football school from India, the country we knew to be a cricket nation. Field hockey perhaps, but football? Would they even know how to kick a ball? Surely this was a mistake of some sort. We did our research and found out that two years earlier, AIFF had appointed former Feyenoord technical director Robert Baan to write a master-plan for the development of grassroots football.

With his blessing in place, we welcomed their batch of 5 coaches and 60 children in Rotterdam for the first ever Bhaichung Bhutia Football Schools football camp in the Netherlands. Surprise quickly turned into admiration when we met the gentlemen running the Delhi school and they explained their mission and vision to us: that no talented Indian kid should be deprived of the best football coaching facilities in the country due to want of money. It soon became clear to us that India does not suffer from a lack of talent, but rather from a lack of football infrastructure.

For a week, Feyenoord's Academy coaches took their Indian counterparts under their wing with training sessions focusing on technical and tactical development of their players. In addition, numerous theory sessions were also held to facilitate knowledge transfer to BBFS coaches on various coaching aspects. Again, we were impressed by their ambition, their commitment to the beautiful game and also by their hunger for knowledge.

A year after their first visit, Bhaichung Bhutia Football Schools approached us again. As it turned out they were asked to consult the Delhi franchisee to the newly founded Indian Super League. As their experience in Rotterdam had been very positive, they wanted us to play a part in this new franchise, adding value with our technical knowledge and experience. Together with our technical director Martin van Geel, I met with Sameer and Vaibhav Manchanda, owners of the Dynamos. The job would be to consult the Delhi Dynamos, helping them to assemble a coaching staff and a first team squad. Minor detail: no transfer fees were to be paid and barely a month was left. That in itself provided us an enticing challenge that we could not turn down. But it was the prospect of being able to play a part in the development of the Delhi Dynamos youth academy in year two of the agreement that tempted us the most. So we took the job, as on the horizon lurked the prospect of being involved with what is



undoubtedly the best quality of Dutch clubs: raising young talent.

That very year, Feyenoord produced more players for the 2014 World Cup than any other club in the world. Soon after the decision was made, I found myself in the Jawaharlal Nehru Stadium in Delhi, sitting on a stool next to Manchanda and in front of over 25 TV-cameras and hundreds of reporters, presenting our vision on the first Indian-Dutch cooperation. It was only then I realized the impact of the new football endeavour in India and the value it could generate for both sides.

The Dynamos could be our gateway to India if we were able to sustain the partnership for several years. We did indeed cooperate in a very positive, intense and pleasant way during that inaugural ISL season, but as the team missed the playoffs by one goal and with other people moving into the leadership, the partnership was dissolved. That meant we never got to do what we were best at: developing young talents and empowering local coaches. The lessons learned from the 2014 Delhi Dynamos adventure were numerous.

First and foremost, as a club from Europe, focused on producing home-grown talent we have valuable know-how, staff members and experience that add value to the Indian footballing landscape. Secondly, on the downside, as an organization we were not fully ready to grasp the full potential of co-operation in India, to embrace it and to capitalise on it. We should have struck partnerships with local agencies, sponsors, perhaps even should have brought one of our club icons over. Thirdly, and this was an unfortunate development, especially considering our unique selling point: the commitment to youth development and coaching empowerment needs to be real in order for it to have a chance. In 2014, that was not the case as the ISL club owners had other things to do and not surprisingly, considering the amazing amount of work that had to be done in a very short while. Fast forward five years and our business of sharing football knowledge across the globe has expanded. We have now organized Feyenoord events on all continents, often together with big corporates or governments who see us as ambassadors.

We have Feyenoord football schools in Egypt, the United Arab Emirates and Poland. In those football schools, we empower local coaches in order to get the best out of local talent. We have partnerships with academies in the United States and Canada, which we take by the hand in order to become the best talent factory they can be. We will be opening several academies in China from 2020 onwards, which we will supply with coach instructors and the recipe to produce both coaches and players. Meanwhile, India has hosted a very successful World Cup for U17 players, which has spurred interest on the subcontinent even further. At Feyenoord, we have India between the cross-hairs and the knowledge of what it takes to build sustainable partnerships when there is commitment, dedication and patience. Talent is available, a football infrastructure has been put in place, what is left to be desired is more corporates stepping in and clubs choosing the path of talent development over that of buying players.

ROAD AHEAD

BY EDITORIAL TEAM

With more foreign leagues across sports getting interested in the Indian ecosystem, football also stands to gain from this increased interest.

Several tie-ups between foreign and Indian clubs exist. These include Atlético Madrid's tie-up with Jamshedpur FC, Chennai City with Basel FC and recent reports have suggested that the City Football Group has shown an interest in partnering with an Indian club.

Sustained partnerships between foreign and Indian entities have been few and far between, and many of these tie-ups have ceased to exist. Licensing deals in the past did pick up steam with the likes of Manchester United FC, Liverpool FC etc. making inroads but failed to establish a sustainable model.

For clubs, it is important to use data for profile building, in order to attract foreign interest.

While many foreign investors have come with a long-term plan, they have been swayed away due to a lack of understanding, both internally and externally, about the Indian ecosystem. Demonstration of tangible value-add to potential investors is required to convince external parties about Indian football.

India also remains a talked about pre-season destination with Kerala Blasters hosting Melbourne City and Girona in 2018. Wellington Phoenix were the first foreign team to play a pre-season tournament in India in 2012 in Shillong. Organisation of international cups in pre-season remains a possibility in the near future.

Utilisation of foreign expertise for the purposes of coach education and shaping curriculum is underway, and is expected to grow with time. Many top-tier teams in India have one or more foreign coaches currently employed with them.

Knowledge sharing between foreign and Indian institutions remains an area to be explored further. An in-depth understanding of best practices abroad can be imbibed but must be tailored to suit local scenarios.

The range of foreign interest in resource building can be extended beyond merely coaching staff. Areas of sports science, management, psychology, medicine, conditioning and analytics have seen extensive research undertaken in foreign universities and the training of local resources through joint programmes with these universities remains a priority.

Besides elite football, there is a considerable growth in interest in India for sport for development and football can play a major role in this space. Football is universally used as a social development tool by clubs, FAs, Governments, NGOs and other organisations. The rise of sports for development in India has opened a new avenue for various foreign stakeholders to approach Indian football.

Partnerships with other football associations throughout the world will help in knowledge sharing between clubs and the potential opportunity for exchange programmes and friendlies. All stakeholders within India need to make sure that we continue to find ways in which foreign inflow of knowledge, finances and other interests are fruitful for the foreign partner to remain committed to India for the long term.


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BHAICHUNG
FOOTBALL





STRENGTHS:

- Foreign clubs have explored opportunities for strategic tie-ups with various academies, clubs and the league
- India is one of the largest consumers of global football leagues, thus indicating the popularity of the sport in the country
- India has become a hot destination for organising global international tournaments such as the U16 AFC Men's Championship, U17 FIFA Men's World Cup and now the U17 FIFA Women's World Cup
- Foreign clubs such as Wellington Phoenix, Girona and Melbourne City have travelled to India for their respective pre-season games
- Massive increase in the number of foreign players and coaches employed across Indian football

WEAKNESS:

- There are no tangible outcomes from these partnerships that lead to the development of game in the country
- Low information dissemination to foreign stakeholders to take an informed decision before investing in Indian football
- Lack of understanding of the Indian ecosystem has seen many well intentioned foreign club ventures in India fail





OPPORTUNITIES:

- Given the technical know-how of foreign clubs, meaningful partnerships can be forged to improve youth development systems in India
- Structured licensing deals over the long term can reap benefits for foreign institutions
- In spite of numerous foreign ventures starting in India there is still a huge opportunity for foreign initiatives to be acknowledged as leaders in India if they invest there time and effort in understanding the Indian footballing ecosystem

CHALLENGES:

- Requires convincing foreign partners to invest keeping in mind a long term view for maximum gains. Short term targets won't lead to any tangible results
- Convincing institutions outside of the country that there is a vision in place

CROSS-SKILLING OF RESOURCES, I.E. TRAINING ABROAD AND THEN RE-DEPLOYMENT IN INDIA CAN ADD TO THE LEVEL OF FOOTBALLING EXPERTISE IN THE COUNTRY.

NATIONAL ALLIANCE FOR WOMEN'S FOOTBALL

The women's game in India received a shot in the arm with the announcement that the country is set to host the FIFA Under-17 Women's World Cup in 2020. This makes the present the right time to assess gaps in pathways for the creation of elite women footballers and plug these deficiencies with immediate effect.

The All India Football Federation's Strategic Plan for the years 2019-22 states that there are currently no leagues being operated for the under-13, under-15 and under-18 age groups for women. The Strategic Plan has set its target at 15, 15 and 18 states and Union Territories running U13, U15 and U18 leagues at the local level by the end of 2022.

With the introduction of gender-neutral Baby Leagues, the access to girls playing the sport at the lowermost levels has gone up. Along with girls only leagues, sustained hosting of these gender-neutral Baby Leagues with a plan of progression to academies and youth set-ups of clubs is the need of the hour.

With resources in the women's game strained, it is important for all stakeholders to utilise these reserves in a judicious manner. In order to maximise the number of games played by a team with limited resources at their disposal, it is recommended that a majority of these matches be played at state or district level.

Sustainability and a periodic injection of funds remains a challenge for most women's outfits in the country at the senior and semi-professional level. Those organisations and clubs that exclusively produce women footballers must be prioritised and aided by subsidies and incentives for progress at the youth developmental level. These steps will help transform more set-ups into professional outfits, given that the above mentioned pathways for girls to progress to the higher levels are built.

It is important to note that certain parts of the country see more footballers making it to the national teams than the rest. States such as Manipur, Odisha, Haryana and Tamil Nadu produce many internationals and terming them high-priority zones will help streamline resources.

The levels at which these mini ecosystems operate are closer to the continent's elite than the rest, thus increasing the probability of producing footballers capable of challenging the likes of Japan, China and South Korea in the future.

The Indian national women's team appointed its first-ever female head coach, Maymol Rocky in 2017. Efforts to increase the number of women in coaching are underway and the introduction of more vernacular courses will ease their path considerably. Apart from licenses, women must be trained for other roles in the ecosystem, such as operations, administration, marketing, strategy and media management.

A large part of developing women's football also has its roots in gender sensitisation and all contributors overcoming their respective biases, establishing the sport on the same level as the men's game. Making play spaces safe for women, providing individual attention to the societal and other challenges faced by a player and the holistic development of every aspiring girl are steps required to bring about a cultural shift in the country.

The need for communication is greater than ever, with efforts focused on women's football in the developmental space increasing in number. The federation, the coaches, the players, organisations and others such as the Alliance must align their efforts with the Strategic Plan for the efficient use of available resources.

The Alliance is a collection of a diverse range of stakeholders, brought together to pool their collective strengths for women's football. Its ultimate aim is to create a radical shift that results in girls playing football on the streets of India becoming the norm one day.



OSCAR FOUNDATION

Oscar Foundation's Young Leader's Programme has trained more than 220 youths from 7 states and through these young leaders OSCAR has successfully reached more than 3000 children.









CEQUIN

CEQUIN's Kickstart Equality programme has promoted football for girls in vulnerable communities by providing free coaching to them. Currently CEQUIN is working with over 3000 girls from vulnerable communities in Delhi and Mewat, Haryana.



KHEL KHEL MEIN FOUNDATION

Khel Khel Mein Foundation is a non-profit organisation with a vision to foster a culture of sports in most challenging communities by enabling every child to PLAY. PERFORM. PROSPER. They have worked with 4000 children across low income schools & communities over last 3 years and currently works with 75 children through an intensive, long term community centric program.



8ONE FOUNDATION

8one Foundation's initiative the 'Young Legends' League' became the first baby league to be launched in India catering to children between the ages of 5 and 13 years through a 6-month long engagement. The programme runs in Mizoram and Manipur.





EAST BENGAL CLUB
JAMSHEDPUR
FC
JAMSHEDPUR
FC
NIVIA
BLUE PILGRIMS
FORCA GOA
ONE LIFE
ONE CLUB
ONE LOVE
CHENNAICITY FC
CHENNAI CITY
FC
KERALA BLASTERS FC
ONE LIFE - ONE LOVE - ONE CLUB
KERALA
BLASTERS
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CONCLUSION



VARUN TRIPURANENI
Co-founder,
World1 Sports

Success can be defined in various ways for any sport and football is no different. In India, success in football is as much about the on-field achievements of our national team as it is about the endeavours of the governing bodies and private parties towards spreading the joy of football to every corner of India.

Indian football is in a state of ascendancy and the commitments made by large corporate houses seems to indicate that there is no turning back now. This book is only the beginning of a concerted effort by all of us to continue to put our best foot forward towards spreading knowledge, experiences and ideas for ensuring that the journey is a smooth one.

At some point of time, once the current initiatives become more lucrative for investors, it is envisioned that investors will efficiently and effectively utilise their funds for developing footballing infrastructure keeping in mind both the quality and quantity required.

Today football fields exist in our county, however, they are often used for purposes other than football which leads to high deterioration of the quality of the pitches. Additionally, more often than not where high quality football pitches are available, their accessibility is restricted especially for the marginalised communities. Another role that infrastructure plays, is giving communities a place of their own with which they can attach their emotions and memories. Community building is as much a goal of football, as is on the ground achievements.

Through this book we hope to have put across the fact that promoting football is not just for the benefit of our country's sporting success and the development of professional players. Football is a medium for bringing about positive change in society and individuals, whether they be young recreational players, their parents, fans or consumers. Notably the challenge before all of us, is to ensure that we keep the momentum going by finding ways in which investors can invest in football as they would in any other business by making it profitable for them. It is only then that we will see the sort of cash influx that is needed to develop the sport both at the professional and grassroots levels.

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