2014 World Cup: A Global Mobile Perspective
Released June 5, 2014
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Top 5 Global World Cup Take Homes

48% will use their smartphone to watch/follow the World Cup and at 19%, Mobile will be the 2nd primary device to follow the 2014 World Cup on (after TV)

Clear evidence that consumers will be dual screening (TV and Mobile) – 37% will use their device at half time, while 35% will use it throughout the game. Meaning that smartphones offer a clear platform to facilitate multimedia campaigns and further consumer engagement.

68% of consumers are willing to pay for World Cup video content – offering a potential revenue opportunity.

90% of consumers intend to share their World Cup experience and social media is seen as being part of, and enriching the World Cup experience for consumers.

37% of the sports fans in our sample click on a mobile ad daily, therefore targeting consumers via mobile advertising offers a gateway for brands – if ads offer relevance, deals and a fun/entertaining nature.
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Methodology and Sample
Objectives and Methodology (1)

Objectives

The FIFA World Cup is the largest international sporting event. Soccer fans around the world will be following it via a variety of different media, including mobile internet. As part of its mission the IAB educates the marketplace about how mobile is changing the way people interact with media and therefore research was needed to understand how consumers would be interacting with the World Cup.

Methodology

- A 20 question survey was designed and fielded in 11 markets (Australia, Brazil, China, Colombia, France, Ireland, Italy, Japan, Mexico, UK, and USA).
- In each market 500 consumers who were 18 plus, owned or had access to a smartphone, follow football and plan to follow the World Cup were interviewed via their mobile device.
- All respondents were asked the same questions – excitement, how they plan to follow the W/C, what devices would be used, what their primary device to follow the W/C would be, how they plan to use their mobile to follow the W/C, what content they were planning use, would they be using a 2nd screen and did they plan to share their W/C experience with others.
- Fieldwork took place from the: 22nd April to the 12th May.
A balanced sample in all markets was achieved with near equal splits in terms of gender and age.

Country: Total Australia Brazil China Colombia France Ireland Italy Japan Mexico UK USA
Date: April/May 2014
Base: Total respondents (5500), Per market: 500

Significantly higher/lower. Tested at 95% confidence interval.
Football is a sport of global interest amongst all demographic groups.

This translates into a clear opportunity for brands and advertisers, with 72% of consumers planning to follow the 2014 World Cup closely.

With intention to follow strong across all markets this reveals a huge global audience in reach of marketers and media companies involved in Brazil 2014.

Not only is the potential viewing audience huge, it is also hugely engaged – 59% are excited about the World Cup.

However, while consumers are excited about the event, the host nation would appear to be suffering from the pressure of hosting a global event. Brazil showed lower levels of excitement some might expect – ranking 6th globally.
There is a clear audience interest in football. 51% are dedicated football fans, 29% only follow big games or events.

- Within the football viewing audience there is a sub group of fanatical fans – 29% who watch or follow as much football as possible, no matter the team, country or league.
- The female audience is more casual, tending to follow only big games or events like the World Cup.

<table>
<thead>
<tr>
<th>Football Fan:</th>
<th>Total (All Markets)</th>
<th>Male</th>
<th>Female</th>
<th>Under 35</th>
<th>Over 35</th>
</tr>
</thead>
<tbody>
<tr>
<td>Football fan - I try to watch/follow as many games as possible, no matter what team, country or league.</td>
<td>51%</td>
<td>29%</td>
<td>24%</td>
<td>28%</td>
<td>23%</td>
</tr>
<tr>
<td>Football fan - I try to watch/follow as many games as possible, but only the ones that my team or country plays in.</td>
<td>60%</td>
<td>36%</td>
<td>20%</td>
<td>31%</td>
<td>22%</td>
</tr>
<tr>
<td>I watch/follow football, but only the big games or events i.e. Cup final, World Cup</td>
<td>39%</td>
<td>19%</td>
<td>10%</td>
<td>9%</td>
<td>12%</td>
</tr>
<tr>
<td>I watch/follow football only because I enjoy watching sports in general</td>
<td>53%</td>
<td>31%</td>
<td>28%</td>
<td>22%</td>
<td>31%</td>
</tr>
<tr>
<td>I watch/follow football only when socialising with friends</td>
<td>47%</td>
<td>24%</td>
<td>12%</td>
<td>10%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Country: Total Australia Brazil China Colombia France Ireland Italy Japan Mexico UK USA
Date: April/May 2014
Base: Total respondents (5500), Per market: (500), Males (3248), Females (2252), U35’s (3910), O35’s (1590)

Significantly higher/lower. Tested at 95% confidence interval.
Of the countries surveyed, football fandom is strongest in Italy, where 70% of respondents state they are dedicated football fans.

- China, USA, Japan and Australia are the markets with the lowest (sub 50%) levels of dedicated football fans. This is likely due to other sports being more popular/prominent within these markets.

Countries ranked from smallest to largest % of football fans.

Country: Total Australia Brazil China Colombia France Ireland Italy Japan Mexico UK USA
Date: April/May 2014
Base: Total respondents (5500), Per market: 500

Significantly higher/lower. Tested at 95% confidence interval.
This translates into a clear opportunity for those involved with the World Cup – with 72% of respondents planning to follow the event closely.

- With three quarters of respondents planning to follow the World Cup closely, the opportunity for brands and advertisers is huge.
- For those who are more closely associated with the event (sponsors etc.) leveraging this continued contact is key.

Q9. Are you planning on watching/following the World Cup this summer? Please select one answer only

- 37% Yes, I plan to watch/follow each stage
- 35% Yes, as much as I can
- 15% Yes, some of it
- 13% Yes, if it's on

Significantly higher/lower. Tested at 95% confidence interval.

Country: Total Australia Brazil China Colombia France Ireland Italy Japan Mexico UK USA
Date: April/May 2014
Base: Total respondents (5500), Per market: 500
Unsurprisingly given location, this desire to follow the World Cup is strongest in South America.

- Time difference is clearly influencing ability to follow in Japan.
Using population figures to extrapolate viewership, the potential viewing audience is significant across the globe.

<table>
<thead>
<tr>
<th>Country</th>
<th>Total Respondents</th>
<th>95% Confidence Interval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>194,001,960</td>
<td>Significantly higher/lower</td>
</tr>
<tr>
<td>Brazil</td>
<td>174,196,440</td>
<td></td>
</tr>
<tr>
<td>China</td>
<td>94,573,430</td>
<td></td>
</tr>
<tr>
<td>Colombia</td>
<td>40,451,500</td>
<td></td>
</tr>
<tr>
<td>France</td>
<td>44,593,500</td>
<td></td>
</tr>
<tr>
<td>Ireland</td>
<td>46,778,350</td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>46,817,125</td>
<td></td>
</tr>
<tr>
<td>Japan</td>
<td>3,536,687</td>
<td></td>
</tr>
<tr>
<td>Mexico</td>
<td>16,207,686</td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>955,101,000</td>
<td></td>
</tr>
<tr>
<td>USA</td>
<td>57,213,000</td>
<td></td>
</tr>
</tbody>
</table>

Date: April/May 2014
Base: Total respondents (5500), Per market: 500

Significantly higher/lower. Tested at 95% confidence interval.
59% of respondents are excited about the World Cup, with males unsurprisingly the most excited.

- Only 15% of respondents have no feelings of excitement at all, while 25% are currently lukewarm.
- 51% of females are excited and with a further 29% lukewarm, there is clear appetite even amongst an audience which is stereotypically viewed as less interested in sport.
However, levels of excitement in Brazil are lower than expected. Could pressure of hosting a global event be subduing excitement?

- While preparing for the event, Brazil has had many obstacles to overcome—including political, social, and infrastructure, along with the normal pressure/expectation placed upon the team—could this be influencing levels of excitement?

- Excitement levels will also no doubt be influenced by whether respondents think their team will do well.

### Countries ranked from smallest to largest % of those who are excited about the World Cup.

<table>
<thead>
<tr>
<th>Country</th>
<th>Total</th>
<th>Australia</th>
<th>Brazil</th>
<th>China</th>
<th>France</th>
<th>Ireland</th>
<th>Italy</th>
<th>Japan</th>
<th>Mexico</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excitement (4 or 5 Net): 59%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **BELOW Average**
  - France: 48%
  - USA: 51%
  - Italy: 52%
  - UK: 56%
  - China: 56%

- **ABOVE Average**
  - Brazil: 57%
  - Ireland: 59%
  - Australia: 60%
  - Mexico: 64%
  - Japan: 72%
  - Colombia: 79%
Section 2: How will consumers engage?
Most consumers plan to follow the World Cup in home, either at their own home (69%) or at someone else’s (34%) – this means not only do you have an engaged audience, but a captive one too!

Unsurprisingly, given the location that most plan to follow the World Cup from, TV will be the primary device used to follow the event at 51%

However, could this be the mobile World Cup?

Smartphones, at 19%, ranked second globally as the primary device consumers will use to follow Brazil 2014.

There are some country nuances, with laptops and internet TV’s being the secondary device – but mobile still features across all markets.

Dual screening will occur globally. 37% will use their phone at half time, while 35% will use it throughout the game. Making mobile’s consumers companions throughout the World Cup.
69% plan to follow the World Cup at home, 34% at someone else’s home and 31% in a bar/pub.

- In home viewership is the primary way respondents will follow the World Cup - this could offer 2 opportunities 1) Socially: How can brands and advertisers fit become part of consumer in home experience? 2) Multiple media usage: While at home consumers have access to all of their devices.

Country: Total Australia Brazil China Colombia France Ireland Italy Japan Mexico UK USA
Date: April/May 2014
Base: Total respondents (5500), Per market: 500

At Home: 69%
Bar/pub: 31%
Out and About: 18%
At Work: 14%
Friend/family member's home: 34%

Significantly higher/lower. Tested at 95% confidence interval.
Across all markets, in home viewership is the primary location from where consumers will follow the World Cup.

- With the global audience all favouring in home viewership the opportunities cited on the previous slide apply both locally and globally.
- Could/is there an opportunity for brands and advertising to create and encourage a global community of fans from different countries?

Countries ranked from smallest to largest % of those who are going to watch the World Cup at home.

- USA: 59%
- UK: 60%
- Brazil: 63%
- Italy: 68%
- Australia: 69%
- Ireland: 70%
- Mexico: 71%
- Colombia: 72%
- China: 73%
- France: 77%
- Japan: 79%

Country: Total Australia Brazil China Colombia France Ireland Italy Japan Mexico UK USA
Date: April/May 2014
Base: Total respondents (5500), Per market: 500

Significantly higher/lower. Tested at 95% confidence interval.
However, some country nuances do exist. In Australia, Mexico and Colombia significantly more will follow when out and about.

- While in home will be the primary location it is important to note that there are some subtle country nuances.
- In Australia, Colombia and Mexico, ‘Out & about’ could suggest the use of online channels in order to watch games that are not shown on terrestrial channels.

<table>
<thead>
<tr>
<th>Country</th>
<th>Where</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>Bar/pub</td>
<td>42%↑</td>
</tr>
<tr>
<td></td>
<td>Out and about (e.g. in a café, shops)</td>
<td>22%↑</td>
</tr>
<tr>
<td>Brazil</td>
<td>Live at the stadium</td>
<td>16%↑</td>
</tr>
<tr>
<td>Colombia</td>
<td>Out and about (e.g. in a café, shops)</td>
<td>31%↑</td>
</tr>
<tr>
<td></td>
<td>At work</td>
<td>25%↑</td>
</tr>
<tr>
<td>Mexico</td>
<td>At a friend/family member's home</td>
<td>46%↑</td>
</tr>
<tr>
<td></td>
<td>Bar/pub</td>
<td>50%↑</td>
</tr>
<tr>
<td></td>
<td>Out and about (e.g. in a café, shops)</td>
<td>24%↑</td>
</tr>
<tr>
<td></td>
<td>At work</td>
<td>24%↑</td>
</tr>
</tbody>
</table>

Country: Total Australia Brazil China Colombia France Ireland Italy Japan Mexico UK USA
Date: April/May 2014
Base: Total respondents (5500), Per market: 500

Significantly higher/lower. Tested at 95% confidence interval.
48% are planning to use their smartphone to follow/watch the World Cup.

- TV is of course the default medium through which to watch/follow the World Cup.

**Q13. Thinking about watching/following the World Cup, which of the following media channels and devices do you plan to use?**

- Feature phone: 7%
- Radio/Digital Audio Broadcast (DAB): 7%
- Tablet (e.g., iPad, Kindle Fire): 18%
- Internet connected TV/Smart TV: 24%
- Laptop/Computer: 32%
- Smartphone: 48%
- TV: 63%

Country: Total UK USA Australia Brazil China Columbia France Italy Japan Mexico Ireland
Date: April/May 2014
Base: Total respondents (5500), Per market: 500

Significantly higher/lower. Tested at 95% confidence interval.
And this trend is evident across all markets measured.

- Smartphones will be a key device for consumers to enable them to watch/follow the World Cup across the globe.

Q13. Thinking about watching/following the World Cup, which of the following media channels and devices do you plan to use?

**Smartphone**

**Laptop/ Computer**

**TV**
While TV is the primary device, smartphones are the 2\textsuperscript{nd} most popular device that will be used to follow the World Cup.

- This suggests a clear opportunity for leverage of dual screen’s – TV and Mobile and gives opportunity for multimedia campaign engagement.

Q14. And which of the following devices will be your primary way of watching/following the World Cup?

- TV: 51%
- Smartphone: 19%
- Internet Connected TV: 13%
There are some markets where laptops and internet TV’s will be the second device to follow the World Cup.

- While laptops and internet TV’s will be used in these markets, mobile still has a role to play.

Q14. And which of the following devices will be your primary way of watching/following the World Cup? 

- Smartphone
- Laptop/Computer
- Internet connected TV/Smart TV
- TV
Dual screening will occur, either at half time or throughout the game.

- Mobile phones will be used both during the game and at half time, making it a key device for sharing consumers’ World Cup experiences.
- 20% of consumers plan to use multiple devices to watch multiple games.

Q19. When watching/following the World Cup do you plan to use more than one device at a time, will you do any of the following?

- 37% of consumers plan to use their mobile phone at half time.
- 40% of consumers plan to use their mobile phone throughout the game.
- 35% of consumers plan to watch multiple games on different devices (i.e., one on TV and one on mobile).
- 38% of consumers plan to watch multiple games on different devices (i.e., one on TV and one on mobile).
- 20% of consumers plan to watch multiple games on different devices (i.e., one on TV and one on mobile).
- 27% of consumers plan to watch multiple games on different devices (i.e., one on TV and one on mobile).
- 14% of consumers plan to watch something else (not the World Cup) on their mobile phone.
- 16% of consumers plan to watch something else (not the World Cup) on their mobile phone.
- 11% of consumers plan to listen to the radio and use their mobile phone at half time.
- 15% of consumers plan to listen to the radio and use their mobile phone at half time.
- 11% of consumers plan to listen to the radio, use their mobile phone throughout the game.
- 14% of consumers plan to listen to the radio, use their mobile phone throughout the game.
- 11% of consumers plan to watch something else (not the World Cup) on their mobile phone.
- 14% of consumers plan to watch something else (not the World Cup) on their mobile phone.

Country: Total Australia Brazil China Colombia France Ireland Italy Japan Mexico UK USA
Date: April/May 2014
Base: Total respondents (5500), Per market: 500

Significantly higher/lower. Tested at 95% confidence interval.
Across all markets TV – mobile dual screening will occur.

- The use of mobile phones throughout game viewership will occur across all markets, making World Cup 2014 a truly multiple media experience.

Q19. When watching/following the World Cup do you plan to use more than one device at a time, will you do any of the following?

- Watch on TV, use my mobile at half time.
- Watch on TV, use my mobile throughout the game.
- Watch multiple games on different devices (i.e., one on TV one on mobile)

Country: Total Australia Brazil China Colombia France Ireland Italy Japan Mexico UK USA
Date: April/May 2014
Base: Total respondents (5500), Per market: 500

Significantly higher/lower. Tested at 95% confidence interval.
Section 3: Mobile – what and why?
The primary motivation for using mobile phones to follow Brazil 2014 is so that consumers can stay in touch and up to date.

What will consumers be using their devices for?

Smartphones will act as the gateway to World Cup information and content – 58% will use their device to access information, while 46% will access content while following the tournament.

There is clear opportunity to transact with consumers, either via sale or transfer for information.

Fanatical football fans are a key consumer group – they will use their mobile more frequently than others in order to satisfy their thirst for football knowledge, and therefore could be a key revenue stream to brands and advertisers.
Staying up to date anytime, anywhere is the key motivation for using mobile to follow the World Cup.

- For those who plan to use their tablet as the primary way to follow the World Cup, the ability to watch games away from home is a key motivator.

**Q16. What are your main motivations for using your phone to follow the World Cup?**
Mobiles will act as a gateway to information and content while consumers follow the World Cup.

- 58% will use their mobile to gather information on the event, while 46% to watch/access content.
- Pleasingly for brands and advertisers, the ability to transact with consumers (either via sale or transfer of information) is also in viewers’ plans.

Q15. Which of the following ways do you plan to use your mobile phone to watch/follow the World Cup? – NET SCORES ON ACTIVITIES

- **Social**: Manage fantasy league; Talk about/comment on events/matches; Take pictures/videos of friends enjoying game - 30%
- **Transact**: Use phone-based ticketing; Gamble; Sign up for alerts; Download official app; Download unofficial app - 37%
- **Content**: Watch live streamed games; Listen to streamed audio of games; Watch highlights/best goals - 46%
- **Information**: Check scores; Get latest news from tournament overall; Latest news from team - 58%
Fanatical football fans will use mobile more heavily than others. Content creation on smartphones and tablets offers a clear opportunity.

- For fanatical football fans, their mobile offers the perfect platform for them to satisfy their need for football knowledge.

Q15. Which of the following ways do you plan to use your mobile phone to watch/follow the World Cup? – NET SCORES ON ACTIVITIES

<table>
<thead>
<tr>
<th>Activity</th>
<th>Global total</th>
<th>Fanatic Football Fans</th>
<th>Primary device: Smartphone</th>
<th>Primary device: Tablet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social</td>
<td>30%</td>
<td>35%</td>
<td>26%</td>
<td>32%</td>
</tr>
<tr>
<td>Transact</td>
<td>37%</td>
<td>50%</td>
<td>38%</td>
<td>42%</td>
</tr>
<tr>
<td>Content</td>
<td>46%</td>
<td>54%</td>
<td>52%</td>
<td>59%</td>
</tr>
<tr>
<td>Information</td>
<td>58%</td>
<td>61%</td>
<td>46%</td>
<td>49%</td>
</tr>
</tbody>
</table>

Country: Total Australia Brazil China Colombia France Ireland Italy Japan Mexico UK USA
Date: April/May 2014
Base: Total respondents (5500), Per market: 500

Significantly higher/lower. Tested at 95% confidence interval.
Largest opportunities exist for consumer-brand transactions in the UK, Colombia and Mexico.

- Consumers in the UK, Colombia and Mexico are significantly more likely to engage in some form of transaction (either via sale or transfer of information) via their mobile phone.
- Brazil shows the highest relative propensity for sharing World Cup news/info via mobile.
- Chinese consumers (followed by those in Colombia, Mexico, and the UK) are the most likely to turn to mobile for content.

Q15. Which of the following ways do you plan to use your mobile phone to watch/follow the World Cup? – NET SCORES ON ACTIVITIES BY MARKET

![Graph showing net scores on activities by market.](image)

Country: Total Australia Brazil China Colombia France Ireland Italy Japan Mexico UK USA
Date: April/May 2014
Base: Total respondents (5500), Per market: 500

⬆️ ⬇️ Significantly higher/lower. Tested at 95% confidence interval.
Fanatical football fans will be streaming, downloading and sourcing more information than others.

- This consumer group will be one of key value to brands and advertisers alike as they seek to satisfy their quest for football knowledge and interaction they become a clear monetary opportunity.

Q15. Which of the following ways do you plan to use your mobile phone to watch/follow the World Cup?

Country: Total Australia Brazil China Colombia France Ireland Italy Japan Mexico UK USA
Date: April/May 2014
Base: Total respondents (5500), Per market: 500

Significantly higher/lower. Tested at 95% confidence interval.
While those who plan to use their tablet as the primary device to follow will be streaming live matches significantly more.

- The functionality and quality of streaming no doubt behind consumer choice.

Q15. Which of the following ways do you plan to use your mobile phone to watch/follow the World Cup?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Global total</th>
<th>Primary device: Smartphone</th>
<th>Primary device: Tablet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check scores</td>
<td>41%</td>
<td>34%</td>
<td>29%</td>
</tr>
<tr>
<td>Latest news from tournament overall</td>
<td>29%</td>
<td>29%</td>
<td>22%</td>
</tr>
<tr>
<td>Watch live matches streamed</td>
<td>40%</td>
<td>26%</td>
<td>29%</td>
</tr>
<tr>
<td>Get the latest team news</td>
<td>26%</td>
<td>27%</td>
<td>24%</td>
</tr>
<tr>
<td>Download Official FIFA World Cup App</td>
<td>26%</td>
<td>28%</td>
<td>24%</td>
</tr>
<tr>
<td>Talk about/comment on event/matches</td>
<td>19%</td>
<td>17%</td>
<td>18%</td>
</tr>
<tr>
<td>Take pictures/videos of me &amp; friends</td>
<td>26%</td>
<td>23%</td>
<td>25%</td>
</tr>
<tr>
<td>To stream matches live via online audio/radio</td>
<td>21%</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Sign up for goal, red card, yellow card etc. alerts</td>
<td>22%</td>
<td>16%</td>
<td>18%</td>
</tr>
<tr>
<td>Download non-FIFA World Cup-related app or apps</td>
<td>23%</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>To gamble/place a bet</td>
<td>29%</td>
<td>13%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Country: Total Australia Brazil China Colombia France Ireland Italy Japan Mexico UK USA
Date: April/May 2014
Base: Total respondents (5500), Per market: 500

Significantly higher/lower. Tested at 95% confidence interval.
The official World Cup app significantly more likely to be downloaded in Australia, Colombia, Brazil and Mexico.

- Interest in the official World Cup App tops unofficial World Cup tie-in apps in all countries in the sample.

Q15. Which of the following ways do you plan to use your mobile phone to watch/follow the World Cup?

- Download non-FIFA World-Cup-related app or apps
- Download the Official Fifa World Cup App

Interest in the official World Cup App significantly more likely to be downloaded in Australia, Colombia, Brazil and Mexico.

Significantly higher/lower. Tested at 95% confidence interval.
In South America use of mobile to help capture the moment of enjoyment is significantly stronger.

- Brazil and Colombia also have the strongest levels of consumers who plan to comment/talk about the event and matches.
- In China, consumers seem more open to ‘talking’ rather than using images to capture their enjoyment of the matches.

Q15. Which of the following ways do you plan to use your mobile phone to watch/follow the World Cup?

- Take pictures/videos of me and my friends enjoying the games
- Talk about/comment on event/matches

In South America use of mobile to help capture the moment of enjoyment is significantly stronger.

- Brazil and Colombia also have the strongest levels of consumers who plan to comment/talk about the event and matches.
- In China, consumers seem more open to ‘talking’ rather than using images to capture their enjoyment of the matches.

Country: Total Australia Brazil China Colombia France Ireland Italy Japan Mexico UK USA
Date: April/May 2014
Base: Total respondents (5500), Per market: 500

Significantly higher/lower. Tested at 95% confidence interval.
Significantly more consumers plan to stream matches in China, Mexico and the UK.

- While in Australia and Colombia we see more planning to use their mobile to ‘catch up’ and access the best goals.

Q15. Which of the following ways do you plan to use your mobile phone to watch/follow the World Cup?

- To watch live matches streamed (i.e., via Sky Go, BBC iPlayer, ITV Player)
- To gamble/place a bet
- To watch/catch up on highlights/best goals

Significantly more consumers plan to stream matches in China, Mexico and the UK.

While in Australia and Colombia we see more planning to use their mobile to ‘catch up’ and access the best goals.
Section 4: How can brands and advertisers engage with the mobile World Cup audience?
90% of respondents look to use their mobile to share their World Cup experience. This makes social media a major opportunity, and Facebook looks like a key outlet. This trend is evident globally.

Viewers will share highlights and goals along with news and information.

There are clear opportunities for brands and advertisers to monetise – 68% of viewers are willing to pay for video World Cup content – both standard and premium/exclusive formats.

Barriers to engaging consumers via mobile ads are slimmer than you think – 37% report they interact with a mobile ad daily.

However, in order to elicit the interaction brands and advertisers must communicate relevance and special deals/offers in a fun and entertaining way.
Social media has a key role to play at Brazil 2014 with most feeling it will enhance their experience of the event.

- For fanatical football fans social media is key – 35% claim they can’t imagine not using it while following the World Cup, thus this channel offers a key gateway to a high value consumer.

Q20. How will social media impact your experience of watching/following the World Cup? Please select one answer only.
As a result, 90% plan to share World Cup content. With social media the key sharing point.

- 66% plan to share via one or more social media channels (Facebook, Twitter, blog, other social media).
- Facebook would appear to be a key channel for World Cup 2014.
- Personal messaging services, i.e. WhatsApp, SMS and MMS based services will also have a role to play as consumers seek to share their World Cup experiences.

Country: Total Australia Brazil China Colombia France Ireland Italy Japan Mexico UK USA
Date: April/May 2014
Base: Total respondents (5500), Per market: 500

Significantly higher/lower. Tested at 95% confidence interval.

Primary device:
- Tablet: 52%

Share

- Post on Facebook: 45%
- Text via app (e.g. WhatsApp): 28%
- Text via SMS/MMS: 27%
- Tweet: 25%
- Post on other social media (e.g. Instagram, Tumblr, etc.): 20%
- Email: 18%
Consumers across the globe will share their World Cup experience.

- In China, Mexico, Colombia, UK and Brazil we see nearly all fans planning to share their World Cup experience.
- With the importance of Word-Of-Mouth and recommendation friends/family key drivers in any consumer-brand relationship, the viral and social media magnification of consumers’ World Cup experiences, and any brands within this, will be key.

Countries ranked from smallest to largest % of those who are going to share World Cup content.

- Japan: 77%
- France: 85%
- Italy: 87%
- Ireland: 87%
- USA: 88%
- Australia: 88%
- Brazil: 93%
- UK: 94%
- Colombia: 94%
- Mexico: 95%
- China: 97%

Significantly higher/lower. Tested at 95% confidence interval.
Goals and highlights are the most likely forms of content to be shared, along with news and information.

- Those that plan to use their tablet as the primary device are significantly more likely to share highlights/goals and content about their team/country.

Q18. And what types of World Cup content do you plan to share or discuss with others?

<table>
<thead>
<tr>
<th>Content Type</th>
<th>Global total</th>
<th>Fanatic Football Fans</th>
<th>Primary device: Smartphone</th>
<th>Primary device: Tablet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Highlights/best goals</td>
<td>42%</td>
<td>44%</td>
<td>48%</td>
<td>33%</td>
</tr>
<tr>
<td>Latest news from the tournament overall</td>
<td>33%</td>
<td>36%</td>
<td>34%</td>
<td>28%</td>
</tr>
<tr>
<td>Content about my favourite team/home country</td>
<td>33%</td>
<td>35%</td>
<td>34%</td>
<td>28%</td>
</tr>
<tr>
<td>Latest team news i.e. starting line ups etc.</td>
<td>28%</td>
<td>34%</td>
<td>31%</td>
<td>25%</td>
</tr>
<tr>
<td>Video content e.g. live games, highlights, goals</td>
<td>28%</td>
<td>31%</td>
<td>32%</td>
<td>25%</td>
</tr>
<tr>
<td>Goal, red card, yellow card etc. alerts</td>
<td>31%</td>
<td>31%</td>
<td>32%</td>
<td>29%</td>
</tr>
<tr>
<td>Pictures/videos of me and my friends enjoying the games</td>
<td>25%</td>
<td>27%</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td>General sporting/footballing banter</td>
<td>25%</td>
<td>27%</td>
<td>25%</td>
<td>25%</td>
</tr>
</tbody>
</table>

Significantly higher/lower. Tested at 95% confidence interval.

Country: Total Australia Brazil China Colombia France Ireland Italy Japan Mexico UK USA
Date: April/May 2014
Base: Total respondents (5500), Per market: 500
Globally, 68% of consumers are willing to pay for World Cup content.

- Clear opportunities exist across all markets to monetise content, especially so in the case of the UK, Mexico and Colombia, where consumers are significantly more willing to pay for video World Cup content.

And what type of World Cup video content would you be willing to pay for?

Countries ranked from smallest to largest % of those who are willing to pay for World Cup content.
Access to full games and highlights are the forms of content consumers are most willing to pay for.

- Best goals are key in Brazil, China and Colombia.

**Q21. And what type of World Cup video content would you be willing to pay for? – STANDARD CONTENT BY MARKET**

- **Access to full games live**
- **Access to highlights of games**
- **Access to the tournaments best goals**

Country: Total Australia Brazil China Colombia France Ireland Italy Japan Mexico UK USA
Date: April/May 2014
Base: Total respondents (5500), Per market: 500

Significantly higher/lower. Tested at 95% confidence interval.
There is also a clear appetite for more exclusive/premium content with consumers willing to pay for ‘exclusives’

- Willingness to pay for this ‘exclusive’ more premium content offers the opportunity to increase revenues for content providers.

Q21. And what type of World Cup video content would you be willing to pay for? – PREMIUM/EXCLUSIVE CONTENT BY MARKET

Access to exclusive content, such as player interviews etc.  Exclusive content about my country's team  Access to ad-free video of games

Country: Total Australia Brazil China Colombia France Ireland Italy Japan Mexico UK USA
Date: April/May 2014
Base: Total respondents (5500), Per market: 500

Significantly higher/lower. Tested at 95% confidence interval.
Barriers to eliciting interactions with advertising are smaller than some may think.

- A third of consumers report they click or interact on a mobile ad daily.
- At 50%, football fanatics are significantly more likely to do so, demonstrating that mobile offers a powerful channel to this high value consumer group.

Q22. While on mobile sites/apps, how often do you click or interact with ads to get more information about a product/service? We would like you to think about all mobile ads, not just World Cup ones.

### Once a day:

- **Global total**: 37%
- **Fanatic Football Fans**: 50%
- **Primary device: Smartphone**: 45%
- **Primary device: Tablet**: 46%

- **At least once a day**: 37%
- **At least once a week**: 21%
- **At least once a month**: 11%
- **Less than once a month**: 13%
- **Never**: 18%

Country: Total Australia Brazil China Colombia France Ireland Italy Japan Mexico UK USA
Date: April/May 2014
Base: Total respondents (5500), Per market: 500

Significantly higher/lower. Tested at 95% confidence interval.
However, response to mobile advertising varies across markets, with some having weaker strike rates than others.

- While in Japan and Ireland the daily strike rate response to mobile advertising is 1 in 3, in markets such as Brazil, Colombia and Mexico the strike rate increases to 1 in 2.
- Understanding these market nuances will help to set expectations for successful mobile media campaigns across the life of the World Cup.

**Q22. While on mobile sites/apps, how often do you click or interact with ads to get more information about a product/service? We would like you to think about all mobile ads, not just World Cup ones. Percentage saying they interact at least once per day.**

![Chart showing the percentage of consumers who click on mobile ads at least once a day by country.](chart)

**Countries ranked from smallest to largest % of consumers who click on mobile ads at least once a day.**

Country: Total Australia Brazil China Colombia France Ireland Italy Japan Mexico UK USA
Date: April/May 2014
Base: Total respondents (5500), Per market: 500

↑↓ Significantly higher/lower. Tested at 95% confidence interval.
In order to elicit action, advertising should contain special deals/offers and be relevant to the consumer.

- In order to optimise both strike rate (see previous slide) and ROI on mobile campaigns, advertisers must offer the consumer something in return and ensure that their message/product is relevant to the consumer.

Q23. Which of the following are the TWO most important factors that would get you to interact with a mobile ad on your phone? We would like you to think about all mobile ads, not just World Cup ones.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Global total</th>
<th>Fanatic Football Fans</th>
</tr>
</thead>
<tbody>
<tr>
<td>Special deal or coupon</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>Ad for a product I’m interested in</td>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>Ad related to a brand or product I like</td>
<td>26%</td>
<td>25%</td>
</tr>
<tr>
<td>Entertaining/interactive design</td>
<td>21%</td>
<td>22%</td>
</tr>
<tr>
<td>Video or animation</td>
<td>22%</td>
<td>22%</td>
</tr>
<tr>
<td>Ad shared by a friend</td>
<td>21%</td>
<td>22%</td>
</tr>
<tr>
<td>Ad related to an ad I’d seen somewhere else</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td></td>
<td>16%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Country: Total Australia Brazil China Colombia France Ireland Italy Japan Mexico UK USA
Date: April/May 2014
Base: Total respondents (5500), Per market: 500

Significantly higher/lower. Tested at 95% confidence interval.
The need for relevance and offers/deals in mobile advertising is evident across all markets measured.

- In most countries in the sample, a special deal matched or outweighed product interest; however for Brazil and China product interest is the factor most likely to drive interaction.

Q23. Which of the following are the TWO most important factors that would get you to interact with a mobile ad on your phone? We would like you to think about all mobile ads, not just World Cup ones.

- Special deal or coupon
- Ad for a product I’m interested in
- Ad related to a brand or product I like

In most countries in the sample, a special deal matched or outweighed product interest; however for Brazil and China product interest is the factor most likely to drive interaction.
While relevance is key, this relevance must be delivered in a fun and entertaining manner to truly tempt/engage consumers.

- Ensuring that your message/product delivered with entertainment/fun will therefore be key to any creative ideas used in mobile campaign planning.

Q24. Which ONE of the following types of mobile ads are you most likely to pay attention to while watching World Cup coverage or searching for World Cup results on your smartphone?

Country: Total Australia Brazil China Colombia France Ireland Italy Japan Mexico UK USA
Date: April/May 2014
Base: Total respondents (5500), Per market: 500

Significantly higher/lower. Tested at 95% confidence interval.
On Device Research
alistair@ondicereresearch.com
About the IAB

The Interactive Advertising Bureau (IAB) is comprised of more than 600 leading media and technology companies that are responsible for selling 86% of online advertising in the United States. On behalf of its members, the IAB is dedicated to the growth of the interactive advertising marketplace, of interactive’s share of total marketing spend, and of its members’ share of total marketing spend. The IAB educates marketers, agencies, media companies and the wider business community about the value of interactive advertising. Working with its member companies, the IAB evaluates and recommends standards and practices and fields critical research on interactive advertising. Founded in 1996, the IAB is headquartered in New York City with a Public Policy office in Washington, D.C. For more information, please visit iab.net.