

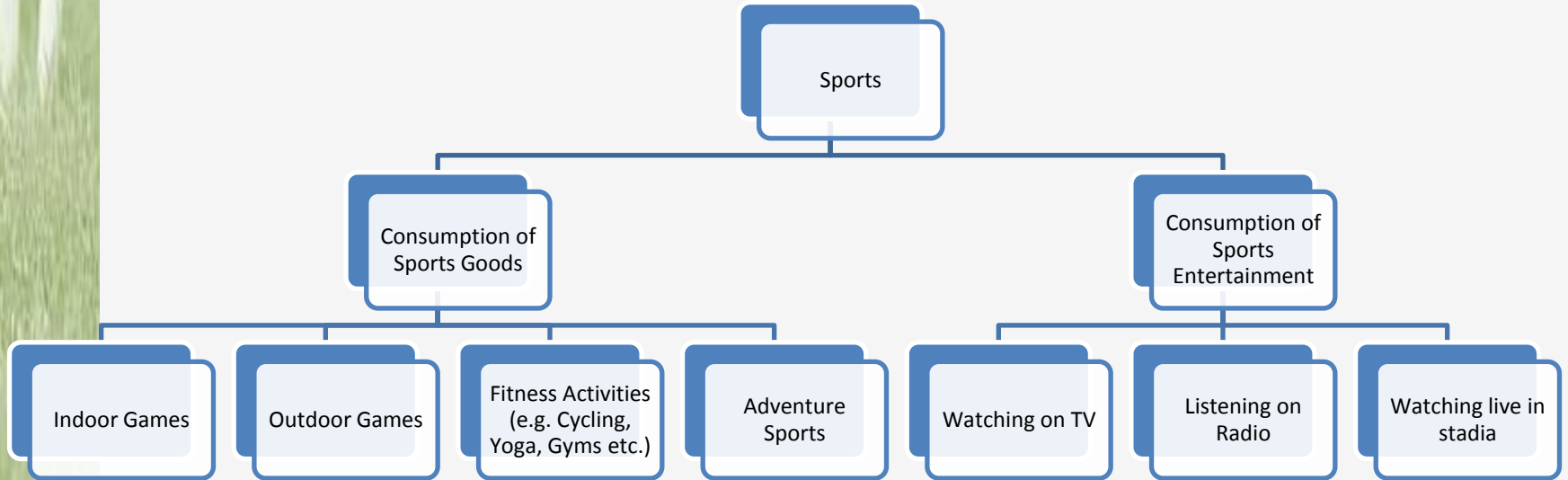


Research **Advisory** and Support Services

Research Possibilities in Sports...

Almost 40 per cent active TV viewers regularly watch sports programmes on TV, but only a handful actually engage in sports activities

Sports Sector: The Gamut



Growth Drivers for the Sports Industry

Supply Side Factors

- Increased options for non-cricket sports
- Success of Indian sportspersons in international fora
- Corporate entry into sports
- Opening up of a greater number of clubs, gymnasiums and sports complexes

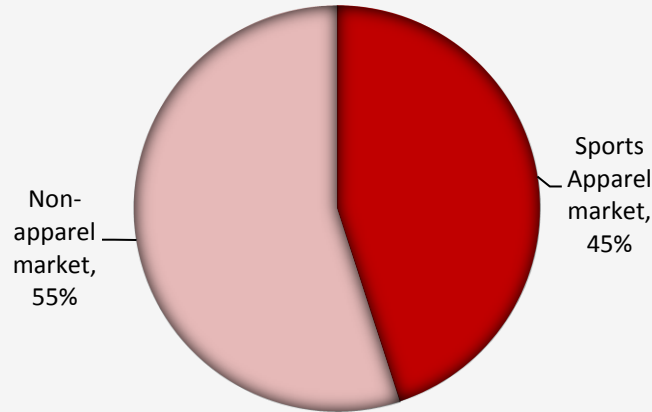
Demand Side Factors

- A young population : half of India is below 25 years of age
- Greater health consciousness
- Increasing per capita consumption and consequent development of a class of luxury consumers

Sports Goods Retail market : Size and Growth

- The premium sports goods retail market in India is valued at **US \$ 0.5 billion***

Premium sports goods retail market



➤ Overall market Growth : 13%

➤ Expected to Reach US \$ 2.6 billion by 2020

The Indian Sports Goods retail market represents a mere 0.1% of the global sports goods market

**Some estimates peg the overall sports retail market to US\$ 10 billion plus*

Business Issues and Questions

- *Which market (product category, geography) should I enter?*
- *Which sports programmes and channels should I advertise my youth/sports products on?*
- *What has been the impact of an ad campaign for my youth/sports product?*
- *What are the benefits of endorsement by a sports celebrity, on my product?*
- *What was the benefit to my brand and company in partnering a sports event?*

Solutions Provided by Azul

- Effective Market Entry
- Trends with regard to sports viewership
- Impact of advertising and communication
- Effectiveness of celebrities and impact of celebrity endorsement
- The pay-back from organizing an event around sports

Usage & Attitude Studies

- Awareness of and engagement in specific sports activities
- Consumption of sports goods
- Drivers for engagement and consumption

Media Consumption Analytics

- Extent and frequency of media consumption
- Favourite genres
- Differences by Age, Gender, SECs, Population Strata and Zones

Advertising Research

- Ads most recalled – on the ground, and in mass media
- Strength of Recall

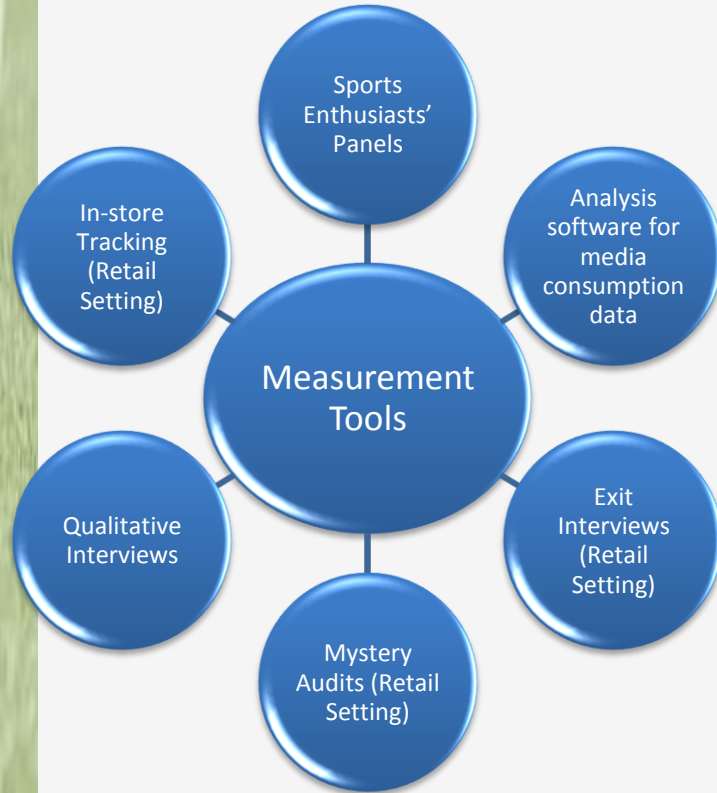
Celebrity Endorsement

- Direct and Indirect impact of endorsement by various celebrities

ROI on an event

- 'Sales-figure related' payback of a sports event

Research Tools Used



Plus standard research instruments



FOCUS GROUP DISCUSSIONS



STRUCTURED INTERVIEWS:

**A) F2F B) ONLINE
C) TELEPHONIC**

An Illustration : Retail Store Health Check

...through mystery audits

- To assess the performance of individual stores (and benchmark) on parameters like:
 - ❑ Store infrastructure & Upkeep
 - ❑ Sales Assistants & Service
 - ❑ Merchandising
 - ❑ Promotion
- Standard Azul audit form and reporting format
 - ❑ A total of 66 parameters on which a store could be assessed
- Performance can be assessed and compared across:
 - ❑ Weekday and Weekend
 - ❑ 1/15/2011Day and Evening

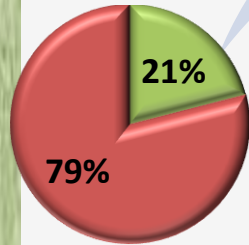
Typical Output Of An Audit...

Attributes *	Weekday	Weekend	Overall
Store Infrastructure and Upkeep	9.1	9.1	9.1
Sales Assistants and Service	6.1	2.6	4.6
Merchandising	8.8	8.8	8.8
Promotion	8.0	6.0	7.0

* Store performance indexed on a score of '10'

An Illustration : Impact of an Event on Sales

Whether purchased any merchandise on the day of the event?



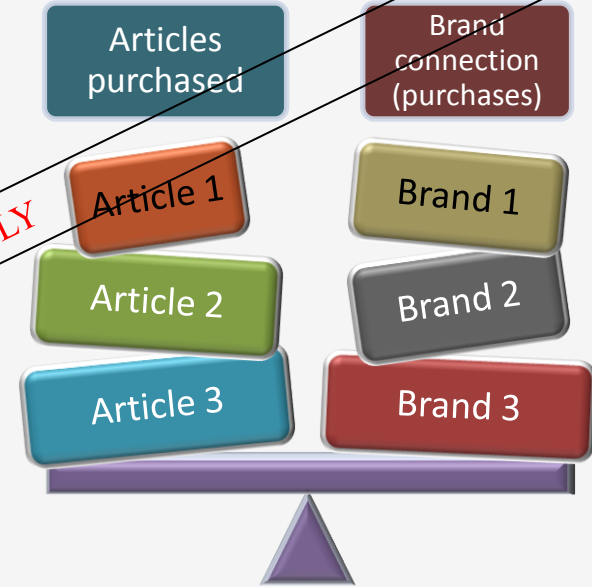
■ Yes ■ No

Purchase drivers

Purchase Driver 2

Purchase Driver 1

FOR ILLUSTRATION ONLY



Base : All who purchased merchandise on the day of the event

Clients : Sports



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