

Why football is more local than global

The recent legal decision which could make it more difficult for Sky and the Premier League to enforce differential pricing across the European Union flags up how interest in club football remains more local than global. For advertisers and sponsors – who are the key to funding of both club and international football – there is rarely a clear analysis on the visibility of the events, teams and matches they are working with. Madigan Cluff and Essential Television Statistics have been working to address this.

We tracked all one thousand and twelve individual football matches and related highlights programmes which were transmitted for the Champions League 2010/ 2011 season across 33 stations in 22 countries.

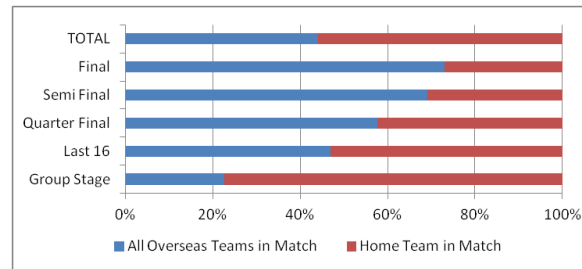
The overall impact of the Champions League is significant on TV schedules across Europe. Across some of the bigger markets in Europe up to 8% of a station's prime time hours in the 6 month season were committed to the Champions League.

However over half the matches broadcast have at least one home country team in the line up. Converting this into a league table of the teams taking part there are two factors which matter;-
How long the team started in the tournament
How big is the country they came from

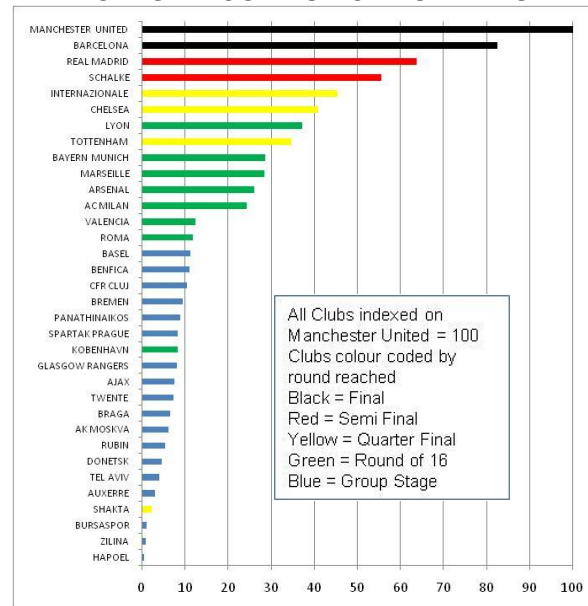
The two factors are of course correlated – and reinforced by the fact that most of the commercial impacts for each team are seen in the country of origin.

For a copy of the full article this was based on please contact info@madigancluff.com

SHARE OF LIVE MATCHES FEATURING HOME COUNTRY TEAM



RANKING OF CLUBS FEATURING IN LIVE MATCHES BY COMMUNICATION VALUE



Edging into the spotlight – how Product Placement is slowly rolling out in Europe

Over the summer Madigan Cluff have been working with Screen Digest to review and predict the growth of product placement.

The report, shows that product placement revenue in the United Kingdom will reach €45 million by 2015, up from just €3 million in 2010. In France, revenue during the same period will hit €72 million, up from €5 million. In another major market, Germany, product placement has shown the fastest growth within the shortest period of time climbing to revenues of €49 million from €5 million in 2010 for broadcasters alone, not even including other parts of the value chain.

In general, what will remain will be the traditional prop placement in TV programs brokered by specialised placement agencies and often based on no-cash deals with the producer. But product placement can also be promoted as a new standalone, paid-for format. In some countries like the United Kingdom, a commoditised model is in the making, with rate cards based on exposure time showing premium cost compared to spot campaigns.

In contrast, German broadcasters are keen to prevent commoditisation and favour product placement in a made-to-order format.

Product placement has not been without controversy. Public emotions ran high in the United Kingdom during the run-up leading to the legalisation of the practice, and divergent views about how the practice fares among viewers can be found even within the TV advertising industry.

Just the same, product placement is expected to create opportunities for television broadcasters, who until now were mostly cut off from revenue available through the practice. In fact, broadcasters have been the most proactive in promoting new opportunities toward brands and agencies and in aiming to educate the value chain. The German television market is proving especially dynamic in the number of product placement deals made since the beginning of this year.

For now paid product placement revenue is relatively small money compared to the overall TV advertising market. But it is still helpful for the TV economy in its role as incremental income for production companies, with the revenue potentially important in the initial funding of TV programmes. As the table below indicates many major advertisers are trialling opportunities – the challenge is the rate at which trials change into serious engagement with placement.

GLOBAL ADVERTISERS TRIAL PRODUCT PLACEMENT				
Company	Product	Country	Programme	Genre
Unilever	Alsa/ Maizena	France	Plus Belle La Vie	Soap
Mars	M&M's	Germany	Schalg den Raab	Game Show
Mars	Bounty	Germany	Schmeckt nicht	Cooking Show
Friesland	Landliebe	Germany	Schmeckt nicht	Cooking Show
Kelloggs	Kelloggs	Italy	GP Family Doctor	Drama
P&G	Dash/ Swiffer	Italy	GP Family Doctor	Drama
HP	Computers	Sweden	Glamourama	Factual Fashion
Nestle	Dolce Gusto	UK	This Morning	Current Affairs
Pedigree	Dentastix	UK	A Different Breed	Factual Animal
Microsoft	Kinect Sports	UK	A League of Their Own	Game Show

For more information go to

http://www.screendigest.com/reports/2011618a/2011_07_product_placement_in_europe/view.html

How the \$6 billion market for imported drama in Europe is holding steady

The value of imported drama series for 120 European broadcasters across 21 territories was \$5,920 million in 2010, according to a new report Madigan Cluff working with Digital TV and Essential Media Statistics have produced the *Imported Drama Series in Europe Report* which shows that this figure was similar to 2009, but was well down on the \$6,623 million recorded in 2008.

The value of imported drama series to European broadcasters

	2006	2007	2008	2009	2010
Revenues \$mil	5,934	6,650	6,623	6,042	5,920
IDS Hours	136,718	143,007	163,301	165,375	163,576
Average Revenue per hour (\$)	43,405	46,502	40,556	36,535	36,188

The advertising recession has had a downward knock-on effect on the value of imported drama series for broadcasters since 2009. Furthermore, governments are scrutinizing public broadcasters more closely than ever, which has put pressure on household license fee income and expenditure.

Values for leaders Germany, Italy and France were all similar in 2010 at around \$1 billion each. However, the UK and Spain recorded much lower figures, revealing less reliance on imported drama, especially during primetime on the main channels. The UK is a sizeable producer and exporter of drama series in its own right.

Unsurprisingly, Italian, French (and German) channels generated the highest value from imported drama series in 2010. France's TF1 was by far the greatest beneficiary, generating \$509 million from 2,178 hours of imported drama series screened. At the other end of the scale, major broadcasters such as the UK's ITV1 and Spain's Antena 3 utilized little from imported drama series.

The total number of imported drama series hours in Europe was 163,576 (3.7 hours a day on average for the 120 channels covered in the report) in 2010, comparable to 2008 and 2009. The number of imported drama series hours has remained stable, but more of these imports are being used to fill non-primetime schedules, especially on secondary channels. Local versions of international formats have gained importance in recent years, with the genre taking a greater share of primetime output.

The average hourly value of imported drama series reached \$36,188 in 2010. This was similar to 2009, but 2009 recorded a notable fall from 2008 due mainly to the advertising recession. In fact, 2008 lower than 2007.

Warner Bros was the largest distributor of primetime imported drama series by hours scheduled during 2010, providing 17% of the total. CBS took second place with 16%, with Disney third on 14%.

For more information please go to
<http://www.digitaltvresearch.com/products/product?id=31>

The influence of brands looks at reaction to brands in and around Celebrity Big Brother?

Analysis by Martin Radford of Ebiquity shows that integrated social media campaigns had limited effect

The return of *Celebrity Big Brother* to TV, moving from its previous home on C4 to the Richard Desmond-owned Channel 5, was heavily hyped within the ad world. There was talk of multi-million pound sums being asked to sponsor the show as O2, Carphone Warehouse and Lucozade had done in the past. Also murmurings of potential placement deals from supermarkets and all manner of brands.

In reality, CBB did have a sponsor – skincare brand Freederm – as well as placement and partner brands, plus others who used it to launch new creative. The format has lost viewers in recent years through a combination of wear out and scandal but there is still a large group of hard core fans who blanked out three weeks of their diary to watch the events unfold.

As the programme was bound to create much online discussion and news coverage in general, we set our Echo Sonar research system to work tracking the mentions of the main brands. Interaction and comment is certainly not to be mistaken for a measure of commercial success (35 million views and counting on YouTube for Old Spice's '...I'm on a horse' ad, though the exact effect on sales is clouded by price promotions) but the presence of several brands, plus the rabid fans, got us interested as to what would be noticed, discussed and mentioned.

We analysed social media and online news mentions of the brands featured: Freederm, Lidl, Domino's Pizza, the film *Fright Night*, Lucozade and social media site Whoozaround.

Starting with the headline sponsor, Freederm, detections were minimal and not hugely positive. The Guardian's live blog for the final commented "9.02pm: IT'S STARTING! I won't miss the Freederm ads, if I'm honest". Association is one thing, but wearout another. Freederm's website featured a link through to a Facebook competition to win eviction night tickets: 31,000 people like the page, 1.7 million watched the show. Perhaps not the best return. The most commented on product was the film *Fright Night*. Used as a reward for the housemates completing a task, the number of mentions for this was almost as many as for all the others combined. Behind this lay a full campaign of bespoke TV copy, press ads, VOD and social media, all pushing a competition allowing viewers to enter the house. What we have here is a fully integrated campaign that linked with the show and used a range of traditional and new media. Next came Domino's Pizzas, the partner for *Eviction Night*. There were merchandising promotions for pizza and Coca Cola every Friday and the function of ordering a pizza through the Facebook site as well as being able to vote through that site for the first time. Northern + Shell also aired conventional advertising across its portfolio.

Third in the list was Lidl. A late entry to the fray, Jedward were rewarded with a trolley dash for the other inmates round the local store. Whether this was a direct deal with Channel 5 is unclear but it certainly got a few keyboards tapped. Aside from a diet that would cause Jamie Oliver concern, the odd bulletin board discussion tended to descend into the merits of various supermarkets. There's no link to CBB on its website so it looks like it got some free publicity which hopefully made up for the mess the twins made in the store. Lucozade got a little coverage by launching its new ad in the show. By catching the audience early in the series there would still have been a bit of 'appointment to view' about it but beyond that, those covering the spot buying were media industry papers. Finally came whoozaround.

Now, the social media network world is always going to be a fairly tough nut to crack for new entrants. By having the official play-along game entwined with answers found by watching the show the hope was to hang on to the show's coat tails. Sadly, little interest appears to have been generated in coverage and even looking at Google Insights returns 'not enough volume to display graphs'.

It's a small sample, but one taken from a show where the audience pay attention and woe betide anyone who messes with the format. @BBUKBoycott even started a Twitter feed to boycott brands in CBB until it replaced the live stream: the ones mentioned directly were Domino's, Freederm and Lucozade.

The most mentioned brand was *Fright Night*, yet it doesn't appear in the boycott call. Is that because it was interwoven into the show rather being 'associated' with? It's impossible to tell but it does seem that such an approach (using new and old media) delivers a stronger result than pure sponsorship.

For more information please go to <http://ebiquityopinion.com/?p=4596>

Who we are

Madigan Cluff (www.madigancluff.com) consults for global advertisers and broadcasters on the value of programs and branded content worldwide. The company has extensive expertise with partners who have directed programs and film, provided global consultancy on communications and media auditing, production and business finance. Madigan Cluff databases the real communications and monetary value created as brands increasingly use programmes as a high value communication vehicles.

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