EMEA Insights:
Football World Cup 2018
The 2018 World Cup in Russia is fast approaching, and for advertisers this means an interesting opportunity to connect with passionate consumers. Leverage these search insights to successfully plan your campaigns.

MARKET & AUDIENCE DATA
Understand the context

PERFORMANCE ANALYSIS
Identify the opportunities

FUN FACTS & THE TEAM’S PICKS
Just for the fun of it
Market & Audience Data
In Europe, Spanish and Italian people are the most likely to be interested in football.
The World Cup generates more and more attendance over the years

Total attendance to the World Cup’s games, by year

2014 Brazil: 3,429,873
2010 South Africa: 3,368,567
2006 Germany: 3,429,873
2002 Japan / South Korea: 3,270,000
1998 France: 3,139,000
1994 USA: 3,073,000
1990 Italy: 2,972,000
1986 Mexico: 2,871,000
1982 Spain: 2,715,000
1978 Argentina: 2,340,000
1974 Germany: 2,208,000
1970 Mexico: 2,109,000
1966 England: 1,970,000
1962 Chile: 1,828,000
1958 Sweden: 1,730,000
1954 Switzerland: 1,658,000
1950 Brazil: 1,540,000
1938 France: 890,000
1934 Italy: 500,000
1930 Uruguay: 434,000

Source: dfb.de
Nearly half of the world’s population watched some of the last World Cup

Total in-home, **worldwide audience reach** in billions for the 2014 World Cup in Brazil based on people who watched:

<table>
<thead>
<tr>
<th>Coverage Duration</th>
<th>Audience Reach</th>
</tr>
</thead>
<tbody>
<tr>
<td>more than 1 minute of coverage</td>
<td>3.2 billion</td>
</tr>
<tr>
<td>more than 3 consecutive minutes of coverage</td>
<td>2.7 billion</td>
</tr>
<tr>
<td>more than 20 consecutive minutes of coverage</td>
<td>2.1 billion</td>
</tr>
<tr>
<td>more than 30 consecutive minutes of coverage</td>
<td>1.9 billion</td>
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</tbody>
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The competition accounted for **98,087 hours** of dedicated TV coverage* all over the world, the equivalent of 11 full years of screen time.

* Dedicated coverage is the television time the event is aired for, based on specific devoted event coverage including live games, repeats, event highlights and magazine shows.

Source: 2014 FIFA World Cup Brazil Television Audience Report.
2014 World Cup TV coverage was greater in Italy than in Brazil, the host country

Dedicated TV coverage time in hours for the 2014 World Cup in Brazil, by country

France: 645, Germany: 244, Italy: 3053, Spain: 747, UK: 357, Brazil (host country): 2833

TV audience reach in millions for the 2014 World Cup in Brazil, by country

France: 47.2, Germany: 65.8, Italy: 45.3, Spain: 32.9, UK: 44.5

Source: 2014 FIFA World Cup Brazil Television Audience Report
2014 World Cup
Search Performance Analysis
Markets
France, Germany, Italy, Spain, United Kingdom

Data
Data from over 130 000 branded and generic queries for the markets listed above on Bing and Yahoo websites. Queries were then split into several query categories: gambling and soccer bets, sports clothing and footwear, sports equipment, travel, TVs, football jerseys, food and drinks delivery and generic World Cup and Euro-related queries.

Timeframe
Monthly data: January 1st to July 31st 2014 (World Cup 2014 in Brazil)
January 1st to July 31st 2016 (Euro 2016 in France)
Hourly data: July 13th 2014 (World Cup 2014 final)
Key Takeaways & Recommendations

A critical event for European advertisers

The World Cup provides a great consumer engagement opportunity for a wide range of industries. And it keeps growing - the last World Cup in Brazil generated around twice as many clicks as the 2016 Euro in France. Be sure to adjust your campaigns to make the most of this amazing event.

Ensure relevant and dynamic device targeting

During the World Cup, mobile share of queries varied greatly according to timing, market and vertical. Italy, for instance had the highest share of mobile World Cup-related searches in Europe at 56%. Take this into account when developing your advertising strategy.

Timing is essential

Desktop queries related to the World Cup tended to peak just before big games while mobile queries peaked right after, with many people checking the final score on the go. Adjust your bidding strategy when the big games occur in order to capture the large search spikes for your key verticals.

Follow the tournament closely

The difference in trends for football jersey searches between France and Germany highlights how the performance of a team in the tournament might influence advertising. Searches for jerseys in France spiked in June at the beginning of the tournament and slowed down the following month after the team was eliminated. On the other hand, volume in Germany skyrocketed in July when the Mannschaft won the trophy.

Mobile gambling and food delivery services

Across Europe, soccer betting and food delivery services are experiencing unprecedented growth. In France for instance, searches for these categories went up 23% and 28% respectively between the 2014 World Cup and the 2016 Euro. These services are also showing promising figures for the beginning of 2018 and will surely be key verticals during this year’s edition of the tournament.
An important event for digital advertisers

Despite our marketplace growing significantly between 2014 and 2016, the World Cup still generated about twice as many clicks as the football Euro happening two years later.

Click trending for World Cup and Euro-related queries around both competitions, in Europe

(Where 100 is the amount of clicks in January 2014, both periods have been indexed on that same month to allow comparison)

Source: Microsoft internal, click trending for World Cup and Euro-related queries, UK+France+Germany+Italy+Spain, Bing & Yahoo websites, January 2014 to July 2014 and January 2016 to July 2016
Increased interest for gambling across Europe

Gambling CTR were significantly higher in all the countries studied during June and July, when the competition was occurring.

Average top position ad CTR for gambling queries, in Europe

- January 2014: 8.7%
- February 2014: 11.4%
- March 2014: 12.6%
- April 2014: 12.3%
- May 2014: 12.0%
- June 2014: 16.5%
- July 2014: 16.1%

Source: Microsoft internal, average CTR for top position ads related to gambling, PC only, UK+France+Germany+Italy+Spain, Bing & Yahoo websites, January 2014 to July 2014.
Sports clothing queries from younger people ramped up from April and peaked in July when the competition ended.

Volume trending for queries related to sports clothing among people between 18 and 34 years old, in Europe (where 100% is the average monthly volume over the period of analysis).

Source: Microsoft internal, volume trending for sports clothing-related queries among 18-34 years old, UK+France+Germany+Italy+Spain, Bing & Yahoo websites, January 2014 to July 2014.
On the day of the 2014 final, desktop searches peaked right before the beginning of the game while Mobile and Tablet’s were the strongest after the end, with people checking which country won while on the go.
Mobile was strong on the day of the final

The share of Mobile for World Cup-related searches was very strong on the day of the competition’s final, especially while the game was occurring between 7 and 10 pm UTC.

Hourly volume repartition by device on the day of the 2014 World Cup final, in Europe

(Where 100% is the total volume during that hour)

Source Microsoft internal, hourly volume repartition by device for all World Cup-related queries, UK+France+Germany+Italy+Spain, Bing & Yahoo websites, July 13th 2014
France - Make sure to develop device-specific strategies for each vertical

During the last World Cup, some categories generated a greater share of Mobile searches than others. In France, gambling and food delivery allow us to highlight that discrepancy with a 16 points difference in their respective Mobile volume share.

Volume repartition by device and by query category, in France

- **Gambling**
  - 72% (Mobile)
  - 23% (Computer)

- **Food Delivery**
  - 55% (Mobile)
  - 39% (Computer)
In France, **food delivery** and **gambling** grew significantly in the two years between the last major football events. With a solid team driving French people’s enthusiasm this year, we can expect them to **grow even further for the 2018 edition**.

**Volume growth** between June-July 2014 (World Cup) and June-July 2016 (Euro) by **query category**, in France

- **Gambling**: 23%
- **Food delivery**: 28%

Source: Microsoft internal, volume growth for queries related to gambling and food delivery between the 2014 World Cup and the 2016 Euro, France, Bing & Yahoo websites, June-July 2014 and June-July 2016.
France - Follow the national team’s performance to anticipate demand peaks

The passion for football jerseys in France spiked in June but then got more tame the following month as the team was evicted from the tournament by Germany in the quarter-finals.

Volume trending for queries related to football jerseys, in France

(where 100% is the average monthly volume over the period of analysis)

Source Microsoft internal, volume trending for football jerseys-related queries, France, Bing & Yahoo websites, January 2014 to July 2014
Without a surprise, both searches and clicks related to football jerseys in Germany skyrocketed in July 2014, after the country won the trophy. They peaked at nearly 5x the monthly average over the studied period.

Volume and click trending for queries related to football jerseys, in Germany

(Where 100% is the average monthly volume and amount of clicks over the period of analysis)
TV sales are in high demand in years where major soccer tournaments happen. German shoppers seem to start their searches for a new TV during the holiday season lasting into January. We expect to see many last minute shoppers in June. December and January already saw peaks far above previous years.

Volume and click trending for queries related to TVs, in Germany (where 100% is the average monthly volume and amount of clicks over the period of analysis)

Source: Microsoft internal, volume and click trending for TVs-related queries, Germany, Bing & Yahoo websites, January 2014 to July 2014 + December 2017 to February 2018
While search volume has been steady throughout tournament years, clicks for sports bets exploded since last December. Typically we see increased activity from March through April, when European tournaments like Champions League get to the decisive stages. During World Cup years, June again is a prime month.

Volume and click trending for queries related to soccer bets, in Germany

(Where 100% is the average monthly volume and amount of clicks over the period of analysis)

Source: Microsoft internal, volume and click trending for soccer bets-related queries, Germany, Bing & Yahoo websites, January 2014 to July 2014 + December 2017 to February 2018
Germany - Early travel planning and last-minute buy

Most German people planned for their World Cup travel early, between January and March. However, we also notice a big searches spike for travel to Brazil in July, with people probably trying to get last-minute tickets as the German team was advancing in the competition.

Volume trending for queries related to travel to Brazil, in Germany
(where 100% is the average monthly volume over the period)

Source Microsoft internal, volume trending for queries related to travel to Brazil, Germany, Bing & Yahoo websites, January 2014 to July 2014
Germany - Soccer fans are hungry, not only for the championship

The day of the final 2014 changed German eating habits. Searches for *take-out food and delivery* spiked on the final day of the tournament. Favorite food ordered by football fans: *Pizza*, pizza ad pizza again!

*Hourly volume trending for food delivery queries, in Germany*  
(where 100% is the average hourly volume over the period of analysis)

Source Microsoft internal, hourly volume trending for queries related to food delivery, Germany, Bing & Yahoo websites, July 9th to July 16th 2014
In Germany, the demographic split of searches around the World Cup is heavily dependent on the query category. People who sought to buy a new TV to better enjoy the tournament were mostly older than 35, while younger people showed a strong interest in food delivery.

Volume repartition for queries related to TVs and food delivery by age group, in Germany.

Source: Microsoft internal, volume repartition for TVs and food delivery-related queries by age group, Germany, Bing & Yahoo websites, January 2014 to July 2014.
Italy - Make the most out of the CTR spike on sports equipment

Italian people were more and more keen on clicking on ads related to sports equipment (football goal nets and posts, balls...) the closer the competition was approaching.

Average top position ad CTR for queries related to sports equipment, in Italy

January 2014: 5.5%
February 2014: 5.9%
March 2014: 6.1%
April 2014: 6.8%
May 2014: 8.0%
June 2014: 8.2%
July 2014: 7.7%

Source Microsoft internal, average CTR for top position ads related to sports equipment queries, PC only. Italy, Bing & Yahoo websites, January 2014 to July 2014
Italy - the number one country in Europe for Mobile searches share during the World Cup

While the competition was occurring, Italy had the highest share of Mobile World Cup-related queries in Europe with a stunning 56%. People checking the games’ results while on the go accounted for the greater part of these Mobile searches.

Volume repartition for World Cup-related queries by device, in Italy

Source Microsoft internal, volume repartition for World Cup-related queries by device, Italy, Bing & Yahoo websites, June 1st to July 31st 2014
CTR for top position PC ads related to the World Cup in Spain went increasing and more than doubled between the beginning of 2014 and June-July when the competition occurred.

Average top position ad CTR for World Cup-related queries, in Spain

Source: Microsoft internal, average CTR for top position ads related to the World Cup, PC only, Spain, Bing & Yahoo websites, January 2014 to July 2014
In Spain, while World Cup-related searches were balanced between genders before the competition, searches from men slowly took over from April onwards.

Volume repartition for World Cup-related queries by gender, in Spain

Source Microsoft internal, volume repartition for World Cup-related queries by gender, Spain, Bing & Yahoo websites, January 2014 to July 2014
UK - A busy period for gambling, even compared to the big horseracing events

Even though **March is usually a busy month** for gambling in the UK with the Cheltenham Festival, it remained rather insignificant compared to the volume generated by the World Cup. Traffic for **Mobile Gambling** also peaked the strongest during the competition compared to other devices.

**Volume trending** for queries related to **gambling**, by **device**, in the UK

* (where 100% is the average monthly volume over the period)

Source: Microsoft internal, volume trending for queries related to gambling, United Kingdom, Bing & Yahoo websites, January 2014 to July 2014
UK - Increased demand for food delivery during the big games

Perhaps unsurprisingly, UK Mobile searches for food delivery were strong towards the end of the competition, especially during the last two games. For the 2018 World Cup, we can expect an even clearer trend with the rise of food delivery apps in the past few years.

Hourly volume trending for Mobile food delivery queries, in the UK
(where 100% is the average hourly volume over the period of analysis)

Source Microsoft internal, hourly volume trending for queries related to food delivery, mobile only, United Kingdom, Bing & Yahoo websites, July 9th to July 16th 2014
In the UK, the average CPC for sports clothing and footwear peaked during the two months preceding the World Cup’s beginning. But while the competitiveness returned to normal after the tournament started, average CTR rose slightly as the competition was advancing, driven by people’s increased interest in football.

Average top position ad CTR for queries related to sports clothing and footwear, in the UK

Source Microsoft internal, average CTR and CPC for generic queries related to sorts clothing and footwear, PC only. United Kingdom, Bing & Yahoo websites, January 2014 to July 2014.
Always more
The 2014 World Cup in Brazil saw the highest total number of goals scored over the competition with a stunning 171.

Overwhelming victory
Hungary takes the prize for most goals scored by a team in single World Cup match.
In 1982, they scored 10 goals to beat El Salvador 10 to 1.

Fair play award
Uruguayan defender Jose Batista holds the sad record of the fastest red card in World Cup History.
He was expelled 56 seconds into the game after a slide tackle on Scottish player Gordon Strachan.
Nine months after Germany hosted the World Cup in 2006, the country’s birth rate increased more than 10 percent. For reference, the overall European Union birth rate has not changed more than 0.1% since that year.

**Bottoms up!**
Over 750,000 liters of beer were sold in stadiums during the World Cup in South Africa. That’s equivalent to around 2,270,000 bottles!

**European dominance...or not**
Of the 20 FIFA World Cup tournaments already held, a European team has appeared in the all but two of the final matches. However, out of the 11 finals where a European team faced a non-European one, the former prevailed only 27% of times.

**Make love not war**
Nine months after Germany hosted the World Cup in 2006, the country’s birth rate increased more than 10 percent. For reference, the overall European Union birth rate has not changed more than 0.1% since that year.
The Team’s Picks
Anna, France Insights Manager

"Pronostic on the winner: Germany, because they are the best."

Ivo, Netherlands & Nordics Insights Manager

"I think Spain will win because they just seem unstoppable."

Barry, UK Insights Manager - Gambling

“My pick for the winner is Germany. They've won all their qualifying matches, are on point and last year they excelled!"

Kate, UK Insights Manager - Retail

“I predict that come the final on the 15th July it will be Germany yet again who will be holding the trophy aloft for a record fifth time.”
Luca, **Italy & Spain** Insights Manager

My pick: **France** – although I hope they will not win as I support Iceland!

Sarah, **UK** Insights Manager - Travel & Transportation

“My guess is **Germany**!”

Peter, **Germany** Insights Manager

“**Germany**: Simply because our nemesis Italy didn't qualify.”

Youri, EMEA Insights Coordinator

“I can't see Ronaldo retiring without winning the trophy. **Portugal** might be in for something big this year.”