

Sponsorship marketing of the 2018 FIFA World Cup

Curt L. Hamakawa
Western New England University

Elizabeth L. R. Elam
Western New England University

Abstract

This case examines the corporate sponsorship program of the 2018 FIFA World Cup and is intended for use in management, sport management, and marketing courses.

Key words: FIFA, marketing, Russia, sponsorship, World Cup



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Introduction

Like many other high-profile sporting events such as the Olympic Games, Super Bowl, FIFA Confederations Cup, and ICC Cricket World Cup, the FIFA World Cup is seen as an extraordinary marketing opportunity for companies to promote their business brands in association with this marquee sports entertainment property.

In the run-up to an Olympic Games, official sponsors clamor to proclaim their vaunted status as proud sponsors of the Games themselves, of organizations such as the International Olympic Committee, the Organizing Committee for the Olympic Games, the National Olympic Committee of participating countries, specific sport teams, and even individual athletes. Similarly, businesses leverage the global profile of the World Cup and the positive attributes associated with the “beautiful game” to heighten their companies’ brand awareness as official sponsors.

Association football, culminating in the quadrennial tournament of national teams known as the FIFA World Cup, is among the most-watched television broadcasts of any sport (Brown, n.d.). Given this fact, it would appear that FIFA, the rights holder of the World Cup property, would be awash in sponsorships of well-heeled multinational corporations. Perhaps surprisingly, this was not the case for FIFA on the eve of the 2018 FIFA World Cup in Russia, with many of the slots available to potential sponsors left wanting (Bowden, 2017).

While FIFA generates its revenue primarily from four sources – broadcast rights, licensing, marketing, and tickets/hospitality – which for the 2015-2018 cycle yielded \$6.421 billion for FIFA’s coffers (FIFA, 2018), this paper focuses on the marketing category and FIFA’s ability through this period to attract sponsors to help underwrite this global enterprise. Sponsorship grants companies the right to be associated in an official capacity with FIFA and/or its properties such as the World Cup, but does not include the cost of exploiting those relationships via advertising and point-of-sale promotions (Handley, 2018).

Christine Fay and Marie Lansing (fictitious names), college students and summer interns at FIFA Headquarters in Zurich, were dumbfounded by the lackluster response on the part of the presumed sports-mad C-suites of the Fortune Global 500, and sought to learn more about the vagaries of corporate sponsorship at the 2018 World Cup in Russia. They thought: why was there not a parade of would-be sponsors tripping over themselves to fork over tens of millions of dollars for the privilege of basking in the glow of the most-watched, single-sport tournament on the planet (Bada, 2018)? Was the asking price too high? Was the ROI just not there? Was the country hosting the tournament a factor? Did a favored team fail to qualify? (Football powers Italy and the Netherlands came to mind.) Was the state of the global economy to blame? Were there other reasons that gave potential sponsors pause? Christine and Marie sought to tame their curiosity by educating themselves on the business of FIFA’s sponsorship marketing program.

Background

FIFA, the French acronym for Fédération Internationale de Football Association, is the worldwide governing body of association football in addition to variants including futsal, beach soccer, and eFootball (Moloney, 2017). Association football, referred to as soccer in the United States and a handful of other countries, is known simply as football or some literal translation thereof, such as futbol, throughout most of the world. Founded in 1904 with just seven national associations – Belgium, Denmark, France, Netherlands, Spain, Sweden, and Switzerland – FIFA

today boasts 211 national associations divided among six hemispheric regions (CNN, 2019). Table 1 illustrates the division of FIFA's membership by confederation.

According to the World Atlas, football enjoys unrivaled popularity among sports, with an estimated 3.5 billion people considering themselves fans, followed by cricket with 2.5 billion, and field hockey with 2 billion (Sawe, 2018). In contrast, American football and basketball are further down the popularity depth chart, tied for ninth place with approximately 400 million people worldwide claiming to be avid followers of these quintessential American sports (Sawe, 2018).

The 2018 World Cup was awarded by FIFA to Russia in 2010, at the same time it awarded the 2022 World Cup to Qatar (FIFA, 2010). Twelve football stadiums hosted fans in 11 Russian cities: Kaliningrad, Kazan, Moscow, Nizhny Novgorod, Rostov-on-Don, Samara, Saransk, Sochi, Volgograd, and Yekaterinburg (Jeffery, 2018). The World Cup Finals consisted of 32 countries' teams, played between June 14 and July 15 (Sheetz, 2018), from which France emerged the champion over Croatia, earning \$38 million in prize winnings (Hess, 2018).

Sponsorship Landscape

As the marketing rights holder of the premier football world championship, FIFA has long had the proverbial golden goose in its once-every-four-year World Cup, due to the sport's unrivaled global popularity. As sport properties go, the World Cup is among the most valuable, especially when considering that the month-long tournament presently consists of just 64 matches (Calfas, 2018). Beginning in 2026, the World Cup field will increase to 48 teams from the current 32, and will consist of 80 matches (Panja and Das, 2018). While the NFL, MLB, and NBA are deemed the most valuable sports properties as measured by corporate sponsorships (Long, 2009), these American professional sport leagues play many more contests over their multi-month seasons. Excluding championship playoffs, regular season play consists of 256 games in the NFL, 1,320 in the NBA, and 2,430 in MLB (Cherin-Gordon, 2018).

For the 2014 World Cup in Brazil, there were 20 corporate sponsors in total (see Table 2), which generated \$1.6 billion for FIFA (Manfred, 2015). Sponsorships were divided into three categories: six FIFA Partners comprising the highest level of sponsorship, eight FIFA World Cup Sponsors, and six National Supporters (FIFA, 2014). According to Forbes, FIFA Partners committed \$25-\$50 million per year while the mid-tier World Cup Sponsors contributed \$10-\$25 million (Smith, 2014). The lowest-tier National Supporters paid between \$4.5 and \$7.5 million per year (Chipps, 2010).

For the 2018 and 2022 World Cups, FIFA revamped the lowest tier of its sponsorship structure by replacing the National Supporters category with a new Regional Supporters category, embarking on an ambitious commercial program with an eye towards encouraging the activation of sponsors in each of the five major hemispheric regions (Homewood, 2016). In the previous framework of National Supporters, these sponsors were limited to companies in the host countries (Cushman, 2013). Presumably, FIFA believed that companies that did significant business in a particular region, or hoped to grow their business in a target geographic region, would take advantage of this lower-priced sponsorship option.

Unfortunately for FIFA, just eight companies signed on as Regional Supporters for the 2018 FIFA World Cup cycle out of a hoped-for 20, and from only three countries, as shown in Table 3: Alfa (Russian bank), Alrosa (Russian diamond producer), Rostelecom (Russian telecommunications), Russian Railways, Yadea (Chinese scooters), Luci (Chinese technology

and entertainment), Diking (Chinese apparel), and the Egyptian Government for tourism promotion (Becker, 2018). Further, as most of the Regional Supporters were signed late in the World Cup marketing cycle – with three being signed on the eve of the opening of the World Cup – it is unlikely that FIFA was able to extract top dollar from these companies (see Table 4).

All told, the 2018 World Cup in Russia raised \$1.66 billion in sponsorship revenue for FIFA (Badenhausen, 2018), which eclipsed the \$1.6 billion generated four years before (Manfred, 2015). Still, FIFA fell short of its optimal sponsorship quotas netting just seven “Partners,” five “Sponsors” (Khanna, 2018), and eight “Supporters” (Becker, 2018), filling only 20 of its 34 potential commercial slots (Dunbar, 2018). While FIFA generated revenue in excess of expenses for the four-year cycle culminating in the 2018 World Cup, this was largely attributable to sales of its lucrative broadcast rights for the World Cup that alone netted more than \$3 billion (FIFA, 2018). At the beginning of the 2019-2022 commercial cycle, FIFA’s cash reserves stood at a staggering \$2.74 billion (Harris, 2019).

Christine and Marie were unfamiliar with some of the sponsor companies, especially those in the Supporter category, and wondered why more Western brands did not sign on to fill available slots in the European, North/Central American, and South American markets. They also wondered why FIFA stalwart sponsors Emirates, Sony, Castrol, Continental, and Johnson & Johnson opted out after the 2014 World Cup (Gibson, 2015). Considering the mind-boggling price points of corporate sponsorships, FIFA’s interns were also curious whether consumers could distinguish between – or even cared about – companies that were official sponsors. They were intrigued to learn that there was a high correlation between official sponsors and brand recall on the part of consumers of the 2002 FIFA World Cup in Korea and Japan (Lee and Bang, 2005). Conversely, a similar study of the 2010 FIFA World Cup in South Africa came to the opposite conclusion (Dhurup, Surujlal and Rabale, 2011), giving them pause to wonder whether companies are getting their bang for the buck in being credited for their sponsorship deed. Still, the interns were fascinated by the power of certain brands to spur a desired consumer response, even so far as developing a propensity to buy the sponsors’ goods and services (Dhurup and Rabale, 2012). Christine and Marie posed these questions and thoughts to their colleagues, in addition to reading articles on the subject from popular media sources.

FIFA Corruption Scandals

In May 2015, after several years of investigations conducted by the I.R.S. and F.B.I., 18 high-level FIFA executives were indicted on bribery and kickback schemes involving the awarding of World Cup bids and relating to the letting of valuable marketing and broadcast contracts (Apuzzo, 2015). This stunning news sent reverberations throughout the football world, because while the odor of corruption had for decades dogged FIFA, most observers did not think they would see the day when the sport’s powerful barons would be held to account for the long-rumored self-dealing. In December of that year, another 16 football officials were arrested and charged with racketeering, money laundering, and fraud after a pre-dawn raid on a Zurich hotel in which FIFA leaders were meeting (Ruiz, Apuzzo and Borden, 2015).

These episodes, referred to as the “FIFA corruption scandal” (Ludden, 2018, Ibrahim, 2017) led to the downfall of longtime FIFA President Sepp Blatter, and his number two, Secretary General Jerome Valcke (Harris, 2016), in addition to influential members of the FIFA Council (formerly FIFA Executive Committee) and other football officials, businesses leaders, and companies (Ruiz, 2017). In the aftermath of the scandal, FIFA’s sponsor stable sent signals

over concerns that FIFA's sullied reputation could be ruinous for their brands, and sharply warned that FIFA's failure to take "swift and immediate steps to address" the problem would result in sponsor abandonments (Pylas, 2015). In their study of FIFA's reputation on sponsor brand equity, Rocha Coelho, Barbosa de Amorim, and Cunha de Almeida (2019) found that notwithstanding FIFA's controversial public image, the FIFA World Cup held a "strong and positive image" in the minds of spectators. Of significance, the Brazilian researchers concluded that critiques of FIFA did not necessarily carryover to taint consumer perceptions of sponsors' reputations (Rocah Coelho, Barbosa de Amorim, and Cunha de Almedia, 2019).

Even before the U.S. Department of Justice-led arrests and indictments of FIFA officials in 2015, heavy-hitter sponsors Coca-Cola, Adidas, Visa, and Emirates expressed concern in 2011 over reports of bribery in relation to the awarding of the 2018 and 2022 World Cups to Russia and Qatar, respectively (Hart, 2011); still, FIFA President Sepp Blatter easily won re-election that year to his fourth four-year term (Branch and Longman, 2011). Related, Kulczycki and Koenigstorfer (2016) studied the effects of corruption on attitudes toward sponsorship of mega sport events, and concluded that "perceived corruption of the event-governing body had a negative effect on attitude toward the event." This finding buttresses longtime FIFA sponsors' decisions to sever ties with FIFA and the 2018 FIFA World Cup. Fortunato (2017) further validated this taint-by-association phenomenon of sponsor flight in his study of the FIFA corruption scandal and the strategic response of stakeholders, especially corporate sponsors.

Human Rights and Construction-Related Deaths

Another issue that affected FIFA's reputation, especially in view of its widely touted fair play campaign (Janoff, 2014) and respect of human rights as memorialized in its Statutes, *viz.*, "FIFA is committed to respecting all internationally recognized human rights and shall strive to promote the protection of these rights" (2018 FIFA Statutes, at p. 7), is its stance toward Qatar and the dozens of worker deaths in the leadup to the 2022 World Cup (Roberts, 2015). According to The Arab Weekly, with three years to go until the opening kickoff in November 2022, 44 migrant workers have lost their lives in construction-related deaths in Qatar as that country races towards completion of its football stadiums and related venues (Alkhereiji, 2019). According to Human Rights Watch, there were 520 migrant worker deaths in Qatar in 2012, noting that 95% of the country's total labor force was non-Qatari (Lewis, 2017).

While FIFA has suffered a long and not undeserved reputation for corruption, the worldwide governing body's seeming lack of concern over the fatalities and oppressive work conditions of laborers in service to Qatar's hosting of the 2022 World Cup was insensitive at best. Just as sponsors expected FIFA to speak out forcefully and convincingly against corruption accompanied by promises of action to root out bad actors within its own house, they too expected FIFA to pressure Qatari officials to mitigate the worker safety situation related to football venue construction. From the corporate sponsors' perspective, it was not a good look to be associated with an organization – FIFA – that was perceived as being complicit in the ongoing incidents of migrant worker deaths.

Russia and Geopolitics

Russia, under the velvet glove rule of President Vladimir Putin, scored back-to-back prizes in winning the right to host the 2014 Olympic Winter Games and the 2018 FIFA World

Cup. To the casual observer, this coup might appear coincidental, but veteran Kremlin watchers know better; that Putin's Russia is not an enterprise prone to results by accident. On the contrary, the former KGB spy is regarded as a shrewd politician and master strategist, attributes that have kept him in power atop the state apparatus since 1999 (Wallenfeldt, n.d.).

The U.S. investigation of Russia's meddling into the 2016 presidential elections aside, relations between Russia and the West have been tense dating practically to the beginning of Putin's rise to power. Persecution of political opponents, imprisonment of members of dissident groups, invasion and occupation of Crimea, criminalization of actions of the LGBT community, suspected deployment of chemical weapons, reputed assassinations of enemies, abetting oppressive regimes, and the list goes on (Kozłowska, 2016; Perez-Pena, 2018).

Against this unflattering backdrop of a country preparing to welcome the world to its doorstep, it is understandable that sponsors might be wary about partnering with FIFA, the organization that decided to award the 2018 World Cup to Russia. To combat this unflattering image and buttress FIFA's flagging sponsorships, Russian companies Gazprom (energy), Alfa (banking), Alrosa (diamonds), Rostelecom (telecommunications), and Russian Railways (Becker, 2018) were prodded to ante up for the sake of national pride and to spare Putin global embarrassment.

China to the Rescue

China, which emerged in the 21st century as a major player on the world sporting stage, having hosted the 2008 Olympic Games and preparing to host the 2022 Olympic Winter Games, appears to be laying the foundation to bring the World Cup to China in 2030 or 2034 (Friend, 2018). As part of its long-game plan to win FIFA's favor then, it was hardly happenstance that a collection of Chinese companies – Mengniu (dairy products), Vivo (mobile phones), Hisense (home appliances), Yadea (electric scooters), and Wanda (property development) – conveniently materialized on the scene for the otherwise sponsor-anemic World Cup in 2018 (Neate, 2018).

Interest in football among Chinese is growing according to Nielsen, which reported a 5% increase in urban populations between 2013 and 2017 (Wilson, 2018). Nielsen Sports Managing Director Glenn Lovett said that "FIFA's Chinese deals can be seen as the country's corporations rowing behind the national effort to develop the game and attract the World Cup" (Wilson, 2018).

Fortunately for FIFA, the major command economies of Russia and China were ready, willing, and able to step in to fill some gaping holes in FIFA's sponsorship marketing program. But for China and Russia's corporate largesse, FIFA would have suffered a humiliating sponsorship defeat with a mere eight supplicants for the 2015-2018 period.

Absentee Countries

The absence of Italy in 2018, one of the most dominant national teams in World Cup history, while disappointing to its countrymen and fans of the four-time champion, likely had little-to-no effect on FIFA sponsorships, since these deals are made years out from the tournament while the team qualifications can be determined almost right up to the eve of the opening match. Similarly, the United States' failure to qualify for its first World Cup in 32 years had zero impact on sponsorships for the same reason, despite the fact that many of the wealthiest companies in the world are U.S.-based (Ponciano and Hansen, 2019).

Conclusion

While corporations decide to enter – and exit – marketing and sponsor relationships for a variety of reasons, Jensen and Cornwell (2017) suggest that the bottom line or economic considerations are prime among them. While the state of the economy can affect the ability and willingness of the sponsor to pay exorbitant rights fees, sponsorship clutter is another important factor at play.

Because companies are loath to publicly acknowledge the specific reason that they passed on a sponsorship or opted out of a standing sponsorship agreement, other than to provide an inoffensive – and generic – statement, it is difficult to know with any precision the motivation of prospective sponsors to partner with FIFA. While companies might take a pass for a given sponsorship cycle, they do not want to harm their business relationship with FIFA in the event that they would like to reconsider in the future. Since business decisions, including whether to enter into a sponsor relationship with FIFA, should be reflective of stakeholders' interests, corporate CEOs and boards must analyze such investments in the context of the circumstances, both known and speculative, and in view of the companies' business objectives.

FIFA's anemic showing of just 20 sponsors for its 34 slots for the four-year cycle ending in 2018 should not have come as a surprise given the battered public image of both the governing body and host country (Ritson, 2017). Reputation by association is a valued commodity and important consideration among corporations that are contemplating entering into such partnership agreements. Former FIFA marketing executive, Patrick Nally, was blunt in his assessment, calling FIFA a "toxic brand" (Musaddique, 2018). Still, FIFA's ability to extract more in sponsorship dollars in the 2015-18 cycle than it did four years before, with a 16% increase in overall revenue (FIFA, 2018) is a testament to the strength and enduring appeal of the World Cup brand.

Case Discussion Questions

1. By definition, high-profile sport organizations and properties are well known. From a marketing perspective, what are the advantages and disadvantages of this notoriety?
2. From a purely financial standpoint, FIFA's 2015-2018 sponsorship marketing program might be deemed a success having eclipsed its revenue stream from four years before. In terms of the number of sponsors across the three categories and the disproportionate reliance on Russian and Chinese companies, however, how does this bode for future marketing cycles?
3. What is a command economy and what impact did this have on FIFA's sponsorship marketing program leading up to the 2018 World Cup?
4. What impact, if any, does a particular country's hosting of the World Cup have on sponsorship? Explain.

5. What is the short answer to Christine and Marie's curiosity about why there weren't more companies – and especially big-name corporations – clamoring to get in on the sponsorship action for the 2018 World Cup?
6. It could be said that FIFA enjoys success as a financial juggernaut in spite of itself. What is the evidence of this?
7. What should FIFA do to protect its financial position in the sponsorship marketplace?

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Appendices

Table 1: FIFA Confederations

<u>Confederation</u>	<u>Region</u>	<u>Members</u>
AFC	Asia	46
CAF	Africa	54
CONCACAF	North and Central America, Caribbean	35
CONMEBOL	South America	10
OFC	Oceania	11
UEFA	Europe	55
Total		211

Table 2: 2014 World Cup Sponsorship Structure

FIFA Partners

Adidas
Coca-Cola
Hyundai/Kia
Emirates
Sony
Visa

FIFA World Cup Sponsors

Budweiser
Castrol
Continental Tyre
Johnson & Johnson
McDonald's
Moy Park
Oi
Yingli

FIFA National Supporters

ApexBrasil

Centauro
 Garoto
 Itau
 Liberty/Seguros
 Wise Up

Table 3: 2018 World Cup Sponsorship Structure

FIFA Partners

Adidas
 Coca-Cola
 Gazprom
 Hyundai/Kia
 Qatar Airways
 Visa
 Wanda

FIFA World Cup Sponsors

Budweiser
 Hisense
 McDonald's
 Mengniu
 Vivo

FIFA Regional Supporters

Alfa
 Alrosa
 Diking
 Egypt
 Luci
 Russian Railways
 Rostelecom
 Yadea

Table 4: Revenue from 2014 and 2018 FIFA World Cup Cycles (in USD\$ billions)

	<u>2011-14</u>	<u>2015-18</u>
Licensing	0.115	0.600
Ticketing	included in Other	0.712
Hospitality	0.185	included in Ticketing

Marketing	1.629	1.660
Broadcast	2.484	3.127
Other	0.724	0.322
Total	5.137	6.421