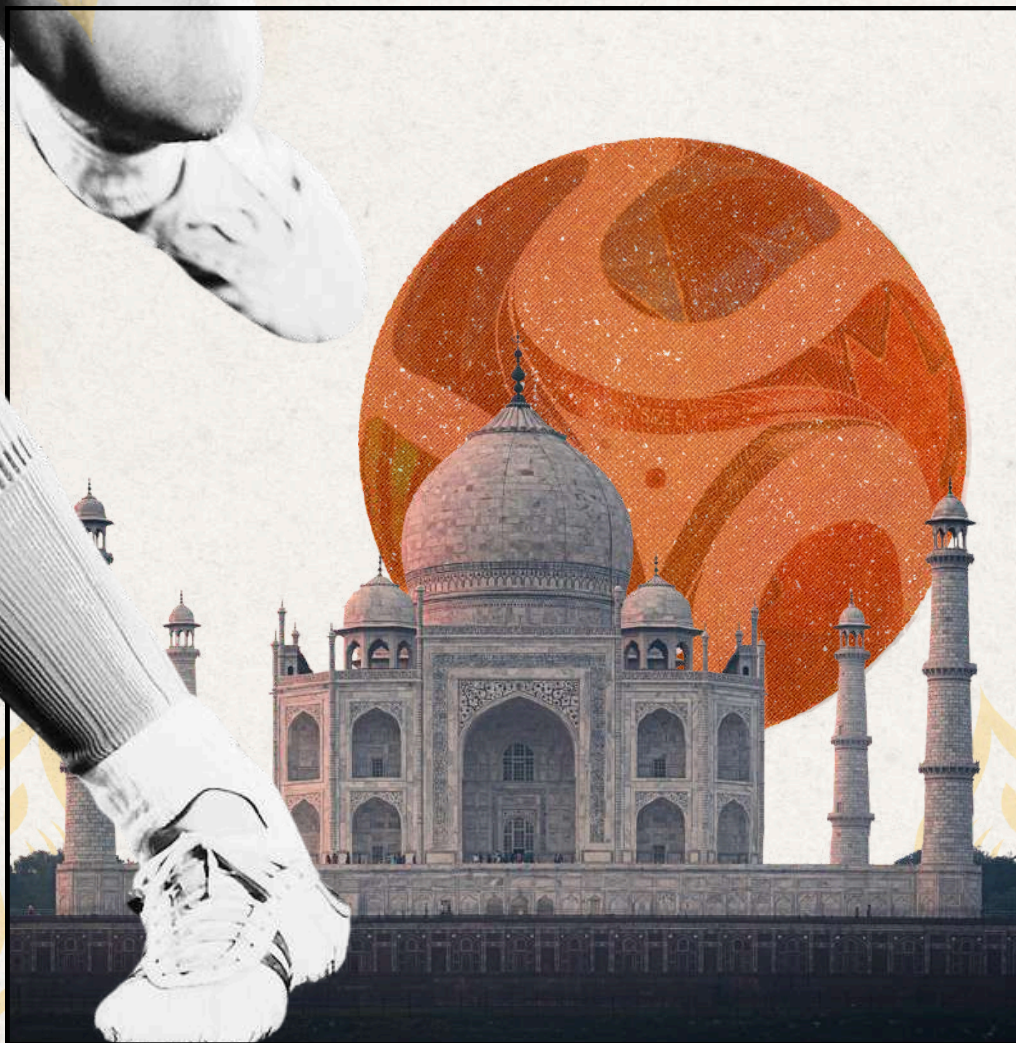


THE RISE OF FOOTBALL IN INDIA



AND THE FIFA WORLD CUP

While cricket remains unmatched in popularity, football has firmly established itself as India's second-most-followed sport.

- The Fan Base: Out of India's estimated 655 million sports fans, the dedicated football fan base has surged to 138.7 million (Source: Nielsen Fan Insights & IMARC Group Report).
- Market Value: The Indian football market reached approximately ₹2,560 crore (£245 million) in 2025 and is projected to hit ₹3,340 crore (£320 million) by 2033, exhibiting an estimated compound annual growth rate (CAGR) of roughly 3.4% (Source: IMARC Group Market Analysis).
- The Heartland: While the sport is growing nationally, the fanatical core remains in West Bengal, Kerala, and the Northeast regions, where local derbies and international allegiance dictate the sporting culture (Source: AIFF Demographic Data).



THE TURNING POINT: WHEN DID THE SURGE HAPPEN?

Football has historic roots in India, but the modern commercial and viewership surge can be traced to three specific catalysts:

The Broadcast & Digital Boom (Mid-2010s Onwards):

The launch of Jio in 2016, scaling of platforms like Hotstar, and widespread OTT adoption fundamentally changed sports consumption. Cheap mobile data allowed a new generation to adopt global club allegiances. The Premier League alone drew a BARC-reported television audience reach of over 71 million in the 2023-24 season. (Source: Broadcast Audience Research Council - BARC India).

The Indian Super League (2014):

The ISL commercialised the domestic game. While the league faces ongoing financial restructuring (Football Sports Development Limited posted revenues of roughly ₹492 crore / £47 million recently), it successfully brought high-production broadcasting, celebrity ownership, and European-style stadium experiences to Indian audiences. (Source: FSDL Financial Filings).

Hosting the World (2017 & 2022):

Just as you noted the massive 232% spike in girls' registrations after hosting the 2022 U-17 Women's World Cup, the 2017 U-17 Men's World Cup served as a similar structural catalyst, forcing the AIFF and the government to upgrade stadiums and training facilities to FIFA standards.



THE FIFA WORLD CUP PHENOMENON: VIEWERSHIP METRICS

In India, the FIFA World Cup transcends the sport; it is a massive cultural and commercial event, even without the Indian flag on the pitch. The 2022 Qatar World Cup shattered all previous records due to accessible time zones and a dramatic shift in how Indians consume media.

METRIC	2022 Qatar World Cup (India)	Note
Total Digital Viewers	110 million	Streamed free on JioCinema, changing the market standard (Source: Viacom18).
Linear TV Viewers	84 million	Placed India in the top 10 global TV audiences for the event (Source: BARC India).
Total Watch Time	40 billion minutes	Clocked across both digital and television platforms (Source: Viacom18).
The Final	32 million viewers	Tuned in digitally to watch Argentina vs. France (Source: Economic Times / JioCinema).
Reach Growth	860% Spike	JioCinema's unique visitors jumped from 2.36 million to 22.7 million in the tournament's opening month (Source: Comscore, Inc.).



THE TURNING POINT: FAN SENTIMENT AND THE DIGITAL REVOLUTION

The modern Indian football fan is highly engaged, deeply analytical, and heavily digital.

MULTI-SPORT FANDOM:

90% of Indian sports fans now follow multiple sports. The era of the "cricket-only" Indian fan is essentially over

(Source: Ormax Media Sports Audience Report)

GEN Z DRIVERS:

The fan base skews exceptionally young. 93% of Gen Z fans consume sports content digitally, staying engaged during the off-season through gaming (EA FC), fantasy leagues, and social media tactical analysis

(Source: Deloitte Sports Trends Report)

GLOBAL ALLEGIANCE

Fan sentiment is heavily tied to player personalities and legacy European clubs. When these icons play in a World Cup, Indian fans adopt those nations as their own

(Source: Kantar Sports Monitor)



THE COMMERCIAL REALITY: THE 2026 HURDLE

Football has historic roots in India, but the modern commercial and viewership surge can be traced to three specific catalysts:

While the business of sports broadcasting often faces logistical hurdles, the market has just proven its long-term belief in the Indian football fan. The upcoming 2026 FIFA World Cup in North America initially presented a unique challenge: because of the geographic location, many of the expanded 104 matches will begin after midnight IST.

Historically, this "midnight problem" limits prime-time advertising value. It led to a temporary standoff in rights negotiations, with initial valuations adjusting from FIFA's early ₹830 crore (£80 million) asking price down to a more market-realistic ₹250 crore-₹290 crore (£24 million-£28 million) range. However, rather than viewing the time difference as a roadblock, the industry is treating it as a launchpad. In a massive vote of confidence, Zee Entertainment Enterprises has officially signed a landmark eight-year agreement with FIFA, securing the broadcast and digital streaming rights for 39 events through 2034.

To capitalise on the massive audience, Zee is launching dedicated new linear networks, Unite8 Sports (featuring localised English and Hindi feeds), and utilising ZEE5 for digital streaming. This long-term investment, which includes the 2026 and 2030 Men's World Cups alongside the 2027 Women's World Cup, proves that broadcasters are looking past temporary time-zone challenges. They are betting aggressively on the sheer volume, passion, and future growth of India's football ecosystem. (Sources: FIFA Official Media Release / The Economic Times, May 2026).

