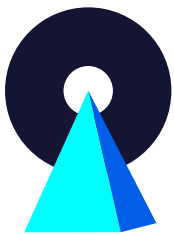


L'essentiel



2022 FIFA World Cup: largely positive results for spectators and broadcasters alike

The 22nd edition of the FIFA Men's World Cup was held in Qatar from 20 November to 18 December 2022. As an event of major importance protected under the French Regulation of 22 December 2004, featuring extensive media coverage and generating

record-breaking audiences, this football competition is a key fixture in the country's audiovisual landscape with its ability to create economic value and bring people together.

More than 6 out of 10 French people watched or listened to at least one match during the 2022 FIFA World Cup

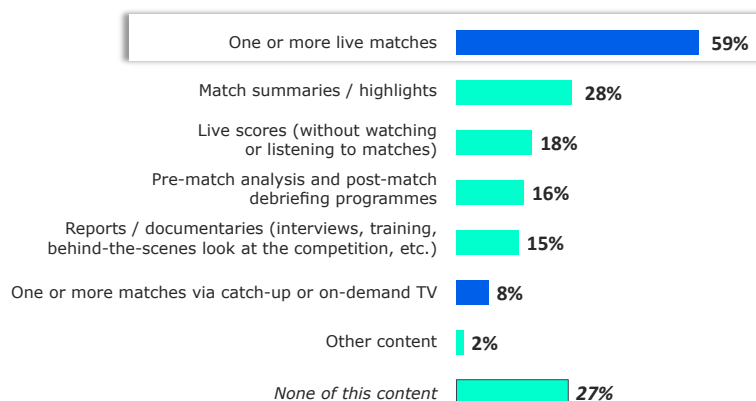
In all, nearly three quarters (73%) of French people aged 15 and above claim to have watched or listened to at least one programme relating to the World Cup, and 61% watched at least one match (live or via catch-up TV). Live matches are the main content associated with the competition (59% of respondents), ahead of match summary reports and highlights (28%), analysis and debriefing programmes (18%), and behind-the-scenes reports (15%).

all types of content is over-represented by men under the age of 35, in the higher income group, and from the Paris region. Live matches were mainly followed by men and the under-35s.

27% of respondents claimed that they did not consume any content associated with the 2022 FIFA World Cup. The main reason mentioned was their lack of interest in the competition

A socio-demographic analysis shows that the audience for

Figure 1: Content consumed in relation to the 2022 FIFA World Cup - Base: French people aged 15 and above (2,102 individuals)



73% of French people claim to have consumed at least one item of content relating to the 2022 FIFA World Cup

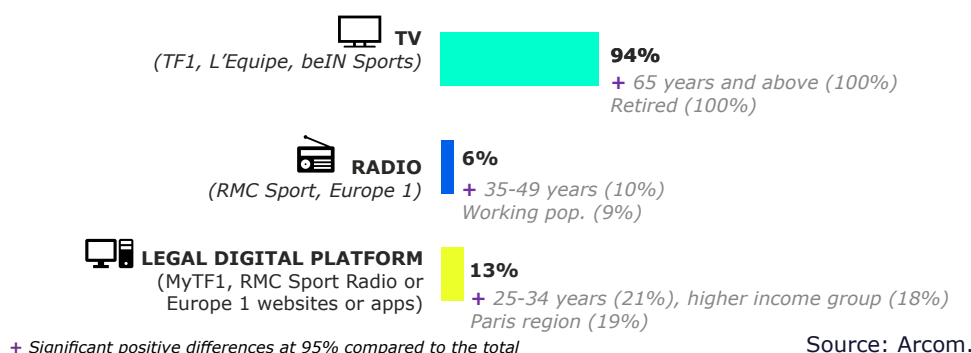
61% of French people claim to have watched or listened to one or more matches (live or via catch-up TV)

(78% of non-viewers / non-listeners), which was far ahead of the decision to boycott the event (17%, or 5% of French people). Nevertheless, the boycott rate reached 24% among the under-35s who did not follow the competition.

While television remains the main medium for watching live World Cup matches (96% of live match viewers), **28% of viewers (especially younger viewers) used a digital device** (computer, tablet or smartphone). In particular, 37% of the under-35s watched at least one match of the competition on their smartphone.

As such, television is still the predominant medium for watching live matches, particularly among older viewers (94% of viewers watched live matches on television, and that figure was 100% for the over-65s). A significant number of people also used the channels' websites and apps (13%), which even accounted for one fifth (21%) of 25-34 year-olds. Finally, radio is aimed at a smaller audience (6%, and 10% for the 35-49 age group).

Figure 2: Media used to follow live matches - Base: live match viewers/listeners (1,242 individuals)



A major event mainly followed using a free and legal service

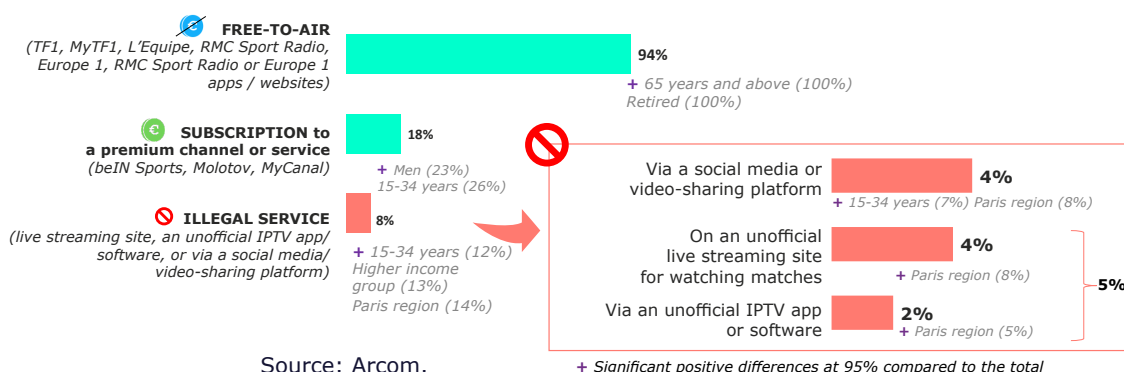
In accordance with the provisions of the French Regulation of 22 December 2004, the matches involving the French football team as well as the opening match, the semi-finals and the final of the FIFA World Cup were broadcast on a free-to-air television service (TF1, which offered a total of 28 competition matches over its channels). As a result, free-to-air TV was logically the most popular method: **94% of viewers used a free service to follow at least one live match.**

While 36 World Cup matches were broadcast exclusively by a private channel (beIN Sports), **18% of people following at least one live match used a premium**

service and 8% used an illegal platform (5% by using illicit live streaming sites or illegal IPTV apps and software).

Young people, who were the most interested in the competition, made greater use of these services than the average: 26% of 15 to 34-year-olds used a premium service and 12% resorted to an illicit service.

Figure 3: Services used to follow live 2022 World Cup matches - Base: live match viewers/listeners (1,242 individuals)



A competition that helps give the channels much greater appeal

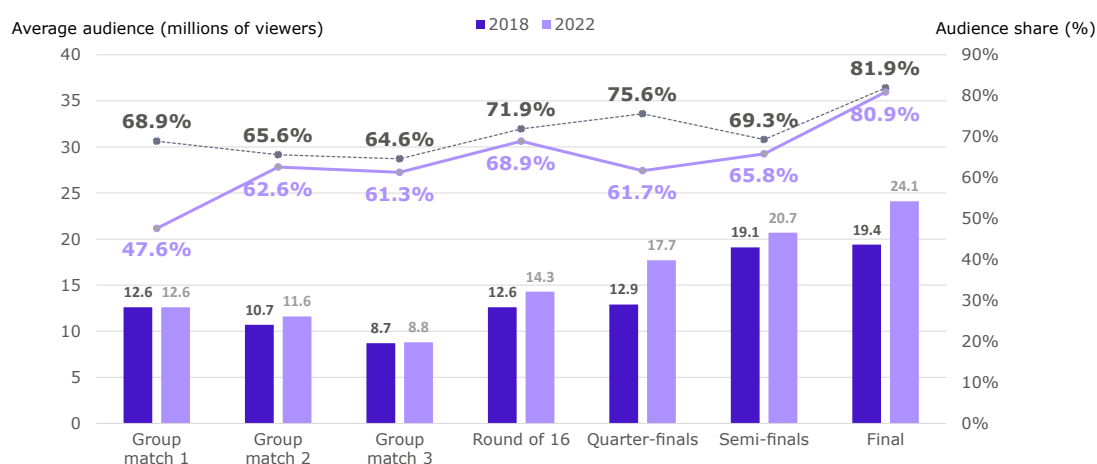
The 2022 FIFA World Cup attracted a major audience: 82% of those watching/listening to live matches claimed to follow most of them in their entirety. Although all competition viewers watched at least one match involving the French team, only half watched matches involving other teams, a rate that climbed to 78% for premium service subscribers.

Audience figures increased as the French team progressed through the competition: 63% of the public watched or listened to the group stage, 83% the knockout stage and 80% the 2022 World Cup final. This **surging interest** was also reflected in the growing number of women watching the matches as the competition went on: women aged 15 and over accounted for 47.6% of the audience watching the final, compared to an average of 38% during the group stage.

This strong interest in the competition has once again enabled TF1, the only free-to-air broadcaster of the World Cup matches, to achieve viewing figures well above its usual average ratings, irrespective of the time slot. The channel's average audience share in the 4-7 pm time slot was 22.7% over November-December 2022, compared to 15.8% in 2021.

The French team's run generated larger audience figures than the previous edition, with an average of 15.7 million viewers tuning in to watch the national team's seven matches broadcast on TF1 in 2022, compared to 13.7 million in 2018. On average, 24.1 million viewers watched the World Cup final on Sunday 18 December from 4 pm on TF1 (80.9% audience share), which set a record in the history of French television, regardless of channel or programme. However, Médiamétrie changed its calculation method in March 2020 by including the number of viewers for television programmes watched outside the home, so this figure should be put into perspective.

Figure 4: Audience viewing figures for the French team's World Cup matches (TF1)



Source: Arcom, citing Médiamétrie.

Premium services also benefitted from the World Cup: 15% of people watching live matches claimed to have taken out a subscription specifically to access competition-related content. The rates are significantly higher among 25 to 34-year-olds (21%) and people living in the Paris region (20%). In particular, 9% of World Cup viewers said that they had subscribed to beIN Sports¹, which is the only broadcaster to show all the matches, specifically to follow the competition. Canal Plus, the exclusive distributor for the Qatari group's

channels (offered as part of the "Canal + Sport" package), also benefitted from the event, with 7% of people claiming to have subscribed to the service for the purpose of following the competition.

In addition to the positive impact on audience figures and subscriptions, the World Cup clearly had a beneficial effect on the partner channels in

¹Rate based on reported figures and including a margin of statistical error. This rate per individual cannot be compared to the number of additional subscriptions achieved by the channel, since one subscription may concern several people in the same household.

terms of advertising revenue. With the autumn period being conducive to higher television audiences and benefitting from the run-up to the festive period, TF1, L'Équipe and beIN Sports 1 achieved a higher gross price per second over the November-December 2022 period compared to previous years. TF1 alone generated

€151.1 million in gross revenue during the competition (excluding sponsorship deals and digital services), which is up 37% on 2018 (€110.5 million gross), according to estimates by Kantar.

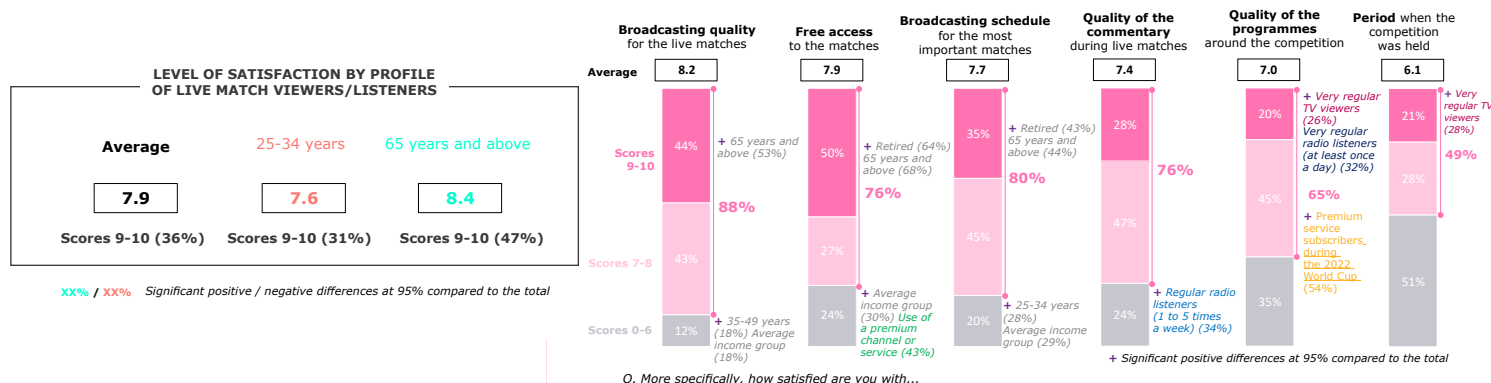
Viewers satisfied with broadcasting conditions during the 2022 World Cup

Overall, viewers were highly satisfied with audio-visual coverage of the competition, offering an average score of 7.9/10. However, there are differences between older people, who were particularly satisfied (8.4/10 for the over-65s), and younger people, who were more guarded (7.6/10 for the under-35s).

Taking a more detailed look, the quality of live broadcasts (8.2/10) and free access to the matches (7.9/10) were particularly appreciated.

The broadcasting schedule (7.7), the quality of the commentary accompanying the live matches (7.4) and the quality of the programmes scheduled during the competition (7.0) obtained scores that were more consensual. Finally, postponing the competition until late autumn proved to be a less popular choice (6.1/10).

Figure 5: Overall and detailed satisfaction with how the matches were broadcast - Base: live match viewers/listeners (1,242 individuals)



Source: Arcom.

Key figures:

- **61%** of French people aged 15 and above watched or listened to at least one match during the 2022 FIFA World Cup (live or via catch-up TV).
- **24.1 million** viewers on average watched the World Cup final between France and Argentina on TF1, which set a record in the history of French television (source: Médiamétrie).

- **96%** of live match viewers followed the competition on television; 37% of live match viewers aged under 35 followed at least one match of the competition on their smartphone.
- **15%** of people watching live matches claimed to have taken out a subscription specifically to access content relating to the 2022 World Cup.
- **7.9/10**: the average public satisfaction rating for coverage of the 2022 World Cup.

Methodology and sources:

- The audience figures for the World Cup matches presented in the study (average audiences, audience share and socio-demographic breakdown) are based on Médiamétrie data.
- Analyses of the advertising volumes and values were based on the data supplied by Kantar and reprocessed by Arcom. The advertising investment amounts shown correspond to the gross advertising rates, i.e. the public prices displayed by the advertising agencies before any discounts granted to advertisers.
- The quantitative study into audiovisual consumption practices during the 2022 World Cup was carried out online from 18 to 27 January 2023 by Ifop on a representative sample of 2,102 French people aged 15 or over (representativeness ensured by the quota sampling method).

For further reading: www.arcom.fr

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