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**Moving the goalposts: the transformation of television sport  
in the UK (1992-2014)**

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**MOVING THE GOALPOSTS:  
THE TRANSFORMATION OF  
TELEVISION SPORT IN THE UK  
(1992-2014)**

**MICHAEL MILNE**

A thesis submitted in partial fulfilment of the  
requirements of the University of Westminster  
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## Abstract

Despite its prominence and popularity, television sport remains an under-researched area in media studies and is a subject that lacks a ready-made theoretical context. Consequently, a political economy approach - including ideas about value, commodification, transformations, power-relationships and the emergence of a profit-motivated sport-media-corporate axis - is used to answer 3 primary questions:

- 1) Whilst sports and broadcasting systems in the US and UK started from diametrically opposed positions post-World War II, why have the similarities between them, including a more overtly consumer-oriented approach in the UK, become the most noticeable features?
- 2) How do three often unseen upstream pre-production processes - technology, broadcasting rights and regulation - increasingly influence what television sport looks and sounds like, where it can be seen and who can see it?
- 3) How are upstream pre-production processes manifest downstream on the supply side in terms of (a) broadcasters (including *who* provides sports media) and (b) independent sports television production, including the day-to-day work of sports producers and directors?

Two critical perspectives are added: 1) the central role of sports federations, ranging from the “peculiar economics of sport” (Neale, 1964) through to federation run host broadcast operations for major events; and, 2) a relevant micro-level analysis of downstream supply-side activities following the trickle down effect of significant upstream transformations. This new perspective complements the big picture often favoured by political economists. It is argued that important transformations in technology, broadcasting rights and regulation have radically changed the television sport landscape in the UK since 1992. How these factors have evolved goes a long way to explain (a) what sport we see on television, (b) where we can see it and (c) what the final output looks and sounds like. The battle to control broadcasting rights and subsequent television output is set against the increasing commercialisation of sport and the marketisation of broadcasting.

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## **Author's declaration**

I declare that all the material contained in my thesis – Moving the Goalposts: the transformation of television sport in the UK since 1992 – submitted on 12.06.2014 is my own work.

A handwritten signature in black ink on a light grey rectangular background. The signature reads "Mike Milne" in a cursive, slightly slanted script.

Mike Milne, 12.06.2014

## 1 | Introduction and methodology

My first encounter with professional sport was as a four year old. Standing outside East End Park, Dunfermline, the noise and excitement near the end of a match had a magnetic attraction - what *was* this? I wasn't sure, but I was hooked. In May 1967, local streets emptied as people turned to their televisions to see Celtic become the first British team to win the European Cup. A year later came the 1968 Mexico Olympics. The fuzzy black and white satellite pictures and the crackling telephone-line quality of commentary from David Coleman on the BBC's breakfast-time television presentation was hypnotic; watching television before school was unheard of, it even felt a little bit revolutionary. The effervescent 1970 World Cup Finals, when Pele's Brazil swept aside Italy 4-1 in the blazing sun of the Azteca Stadium, was the first time I saw colour television - the shimmering gold of Brazil and the brilliant azure blue of Italy are images that still come easily to mind. Back then, any idea that I would work as an executive producer in television sport in the UK and USA would have sounded far-fetched. But it happened. As a frontline participant-observer I have experienced a radical transformation in *how* television sports programmes are made, *who* programmes are made for and *where* they can be seen. From an all time low point in the 1980s, I saw football rise again to become part of a global sports business that, in 2010, was estimated to be worth US\$122 billion (Evens, Iosifidis and Smith 2013:19). The goalposts have moved; transformations on this scale and magnitude are not accidental.

For Boyle and Haynes (2000:45) sport and television were “two great cultural forms which simply proved to be irresistible to each other”. Mediated sport has offered us a view of history lived and shared; it can also provide an engaging dialogue, a sense of identity and enhanced cultural citizenship. Today, for most people, most of the time, watching sport means switching on the television rather than attending an event. Summer 2012 marked a high point in the sheer amount of television sport broadcast in the UK, including the Euro 2012 football tournament, Wimbledon tennis, Bradley Wiggins’ success at the Tour de France, the London Olympics and the Paralympics. But, for all its prominence, television sport is a subject where academic research is limited. Important contributions to understanding have been made by, amongst others, Barnett (1990), Whannel (1992), Tunstall (1993) and Boyle and Haynes (2000,2004). More recently, the marketisation of broadcasting, the sport-media-business complex, and the roles of sports broadcasting rights and regulation have attracted the insight of political economists from Nauright and Schimmel (2005) through to Evens, Iosifidis and Smith (2013). Despite these valuable contributions large gaps in understanding can still be found.

### **Research challenges**

Access presents a major challenge for researchers approaching television sport. Acute commercial sensitivity means information about sports broadcasting rights is heavily guarded. The growing technical complexity of major event coverage can provide another barrier, as can workflows that bear very little resemblance to those of only a few years ago - the fast moving pace of change tests analysis. In the UK television sport is a relatively small sector, so knowing people is crucially important. Outsiders

can be treated with caution and working cultures this tightly padlocked can be hard to pick open. As the reasons not to bother mount then it is hardly a surprise that researchers often opt to consider the big picture, the battles for control of broadcasting rights and the strategies used to gain market dominance. As a result what is missing is a contemporary account of how significant pre-production factors interact and have shaped transformations in television sport in the UK, including many largely unseen but important outcomes in the downstream production-side. The consequences of these transformations are significant, yet they remain largely unexamined.

### **Research questions**

On face value transformations in television sport – including dramatic increases in the volume of sports content, the remarkable advances in coverage made possible by digital technology; that there are now many more channels broadcasting sport in the UK, plus new means of delivering content for consumption via computer, tablet and mobile phone – might have provided a foundation for a creative heyday for sports producers and directors. However, a very different scenario appears to be playing out. Causes for concern include how intellectual property rights have been used to “inhibit innovation and creativity” (Haynes, 2005:10) and what Drahos and Braithwaite (2002:4) call the “quiet accretion of restrictions”.

The primary research questions are:

- 1) Whilst sports and broadcasting systems in the US and UK started from diametrically opposed positions post-World War II, why have the similarities between them, including the adoption of a more

overtly consumer-oriented approach in the UK, become the most noticeable features?

- 2) How do largely unseen upstream pre-production processes – technology, economics (specifically sports broadcasting rights, but also the economics of sports organisations and media providers) and politics (as applied via competition law and media regulation) – increasingly influence what television sport looks and sounds like, where it can be seen and who can see it?
- 3) How do these upstream pre-production processes impact downstream on (a) broadcasters (including *who* now provides sports media) and (b) independent sports television production, including the day-to-day work of sports producers and directors?

### **Research overview**

It is argued that transformations in television sports production in the past two decades have been driven by a combination of increasingly influential upstream forces including technology, sports broadcasting rights and regulation.

As leagues and federations have extended their direct control of coverage and output we can see (a) an increasingly prescriptive approach to television sports production including (b) additional conditions written into sports broadcasting rights as they are issued and (c) since around 2005, how leagues and federations now produce global television coverage for major events, including the Olympics and World Cup Finals, with

broadcasters providing localised presentation in their own markets.

Separately, we see the Premier League producing and distributing its own international television channel.

A political economy perspective is used to interpret these transformations and to track the shifting relationships (and behaviours) that increasingly define televised sport in the UK. Haynes (2005:68) points out that the ownership of key sports rights has become “the flagship and distinguishing factor of a television station’s brand identity, and are lost at their peril.” The research updates understanding by examining the critical and often overlooked *interplay* of technology, broadcasting rights and competition/regulation and how these factors exert a growing influence on what is subsequently produced. Viewing the virtually unrestricted financialisation and commodification of sport and the marketisation of broadcasting the research remains aware of (a) how economic markets work, (b) how market forces affect economic outcomes and (c) how powerful actors attempt to manipulate market forces to advance their private interest (Gilpin, 2001:40).

### **Research structure and perspective**

The research is set out in three parts. Part one provides relevant background, with an introductory chapter including methodology. Chapter 2 provides the literature review and further context, whilst chapter 3 addresses a surprising gap in the literature by adding a historical comparison of the development of televised sport in the UK and USA between 1945-1995.

Part two focuses on 3 increasingly influential pre-production factors that now shape television sport, including technology (chapter 4), sports broadcasting rights (chapter 5) and regulation (chapter 6).

Part three offers a micro-level analysis of the challenges and trends faced by broadcasters (chapter 7) and in independent sports television production (chapter 8). Chapter 9 provides a conclusion for the research.

In *A Brief History of Neoliberalism* Harvey (2005) talks about “accumulation through dispossession” (2005:159) and how neoliberalisation has meant the “financialisation of everything” (2005:33), as sport has shed many of its cultural and social dimensions in favour of a climate where economic value reigns supreme then adopting a political economy view feels appropriate. Who gets what, when and how are questions that are seldom asked by economists. However, political economy theory is at its best when charting major currents in economics, politics and technology therefore it tends to offer a wide-angle view. This research zooms in to provide a more closely focussed view of how these key transformations work and how they are subsequently manifested in broadcasters’ activities and in the day-to-day work of sports producers and directors.

### **Original contribution to knowledge**

In the 1990s I was based in the US as producer of NBA coverage on Channel 4. Sometime later I read a short analysis of this production by Boyle and Haynes (2000:98). Their views were interesting but, ultimately, felt disconnected from my experience of devising and delivering this content. Crucially, this research will provide a connection to work place

practice through participant observation, day-to-day field notes and contributor interviews with those closely involved in television sport. In some ways the research can be regarded as *complementary* to a wider political economy view, providing a micro-level view of the supply side, a terrain too often viewed from a distance.

In part one, a chronological review of the opposing television-sport systems that were adopted in the United States and the UK post-World War II and their subsequent development fills a surprising gap in the literature. How sport and television in the UK, after a prolonged period of resistance, came not only to adopt more consumer-oriented approaches seen in the US but, in some instances, to become even more commercial in outlook says a lot about the state of play today. Whilst Barnett (1990) cautions against such comparisons the extent to which sport and television have continued to develop in the 21<sup>st</sup> Century, including the predominance of live football coverage, suggests such a review would be useful. Also missing is a consideration of league and federation activity, from the “peculiar economics” of sport (Neale, 1964) through to the latest stages of commodification and downstream broadcasting activities.

Moving to part two; an analysis of how technology, economics (broadcasting rights) and politics (competition and regulation) increasingly shape what television sports looks and sounds like, where sport can be seen and who can see coverage provides an updated view. Whilst Haynes (2005) and Evens, Iosifidis and Smith (2013) have offered a valuable insight into the role of broadcasting rights, this research explores the ways technology, broadcasting rights and regulation are closely interconnected and, *together*,

exert a significant influence on television sport. I am not aware of any similar approach.

How influential decisions have migrated upstream, away from broadcasters towards leagues and federations, extends the work of Todreas (1999), Gratton and Solberg (2007) and Doyle (2002) as the various power-relationships and battles for control in the television sport production chain are updated. In terms of case studies, new examples from Premier League Productions and the UEFA Champions League are provided.

Insight on a micro level is offered in part three, as the trickle-down effect of wider transformations are identified. Further contributions include the challenges now faced by broadcasters, for example (a) the rise of federation-based coverage of major sports events and (b) the subsequent importance of presentation in sports television – both discussions cover new ground. The research then adds the perspective of independent production sports companies as well as individual producers and directors as they adjust during this period of unprecedented transformation. The research is foregrounded by frontline experience throughout.

### **Research context**

As a participant observer I have been immersed in television sports on a daily basis since the early 1980s. The research draws on my industry connections and the personal trust I have established working as an executive producer. I started my professional career at the BBC and, since then, have held senior positions at several independent production companies including Cheerleader Productions, Chrysalis Television and IMG

Sports Media. I have also been a consultant at several other firms, including Endemol Sport.

In addition to 40 high-profile international sports productions – from the *NFL, NBA, Football Italia, Rugby Union, Sumo, Formula 1* and *World Rally Championships* - I have written numerous tender responses on behalf of independent production companies for both broadcasters and federations. Looking at new channels, I have been involved with Setanta Sports News, Trace Sports and BT Sport. Adding consultancy work carried out for the Bundesliga, the IOC and FIFA during 2012 means many of these projects have been relevant and have helped inform my approach. My curiosity about the transformation of television sport was first triggered working closely with rights-holding federations in the US, UK and Japan, along with influential research by Barnett (1990) and Whannel (1992).

A primary objective is to offer an interpretation of how wider forces manifest themselves in the day-to-day work of media providers and sports producers. The research evidence has been collated from a variety of sources including (a) my role as a participant observer, with access to commercially sensitive activities over a prolonged period, (b) from daily personal encounters, including numerous field notes, alongside (c) new fieldwork comprising selected contributor interviews and (d) a larger number of short-form interviews many of which were carried out following specific work place situations. There were approximately 50 contributors from broadcasters, federations and independent production companies. The contributors were more experienced and many had senior positions. Throughout I was conscious of accessing people and places where entrance

raised some questions about critical perspective, in other words in trying to adopt a friendly but neutral position there is a danger of being disowned by both sides. Accessing busy professionals to discuss potentially sensitive business practices can be problematic and not all the contributors approached chose to take part, at least in a longer interview. As the research progressed I found that a combination of day-to-day field notes and shorter, but more specific, questioning carried out in the context of work activities provided the best results, consequently the methodology was adapted as the research progressed, particularly for the micro-level shop floor view provided in part three. I am aware that my own career history, professional contacts and the level of trust I have gained were extremely useful tools not normally available to media researchers. On occasions where my own experience as an observer-participant is a factor, then this is clearly marked. Although I have used examples from my own experience, the research is not about my work but is about (a) how many important aspects of television sport have been transformed and (b) the sheer scale of these transformations. Whilst the final argument presented benefits from extensive access and hands-on television sports production experience, I hope the evidence is separated from any emotional pull and guards against easy assumptions and short-handedness. Offering anonymity was a critical component in attracting expert contributors, as was the assurance that no commercial confidence would be breached. Wherever I was working my research interest was made known to my employers. Although no issues were ever raised it was assumed that confidentiality would be observed, particularly for projects covered by non-disclosure agreements. All contributors were approached in advance, the research terrain was explained to them and contacts to my supervisor provided should any

questions arise. The interviews were carried out after a cooling off period was allowed. I am not aware of any material used that compromises contributors or that is inappropriate from an ethical perspective.

### **Methodology overview**

The research moves from a wide-angle view in part one to a detailed analysis presented in part two. Part three zooms in to provide a micro-level view of how transformations are manifest in day-to-day workplace practices.

### **Part one methodology**

Part one is mainly constructed from secondary research into the literature, theory and history. Where there is a scarcity of literature, for example in the most recent broadcasting legislation and/or regulation, then document analysis is used, including:

Legislation. Key changes to broadcasting regulations (including UK, European and US legislation), DCMS, Ofcom (ITC) and European Commission publications. Material can be accessed online via the relevant regulator website. There are also good summaries and discussions in national newspaper archives held online.

Industry Reports and Trade Journals. Industry reports from media and sport were useful sources, including independent reviews (e.g. the Annual Review of Football Finance by Deloitte & Touche, and Independent European Sport Review and research papers including the Birbeck Football Governance Research Centre). These reports offer insight into economic criteria,

copyright issues and, of course, media policy. Broadcaster annual reports and policy statements, including from Ofcom, were useful. As a contemporary and fast-moving subject, so specialist periodicals - including political economy debate, sports business, legal and marketing reports like *TV Sport Markets*, *Sports Business* reports - were useful sources.

## **Part two methodology**

Part two combines secondary research with primary research, including daily field notes taken as a participant observer, semi-formal contributor interviews plus my own professional encounters and experience.

Chapter 4, technology, is an area where producers and directors are often most comfortable and spoke freely. Most people were quite open about the technical aspects of coverage and delivery; they often talked like proud parents of plans and productions that had been successful. Discussion of digital workflows, new developments in graphics or media servers followed from a comprehensive consultancy document I wrote for the Bundesliga in 2012, with detailed benchmarking against other federation-based output including the Premier League. To illustrate key points I have provided an interpretation of relevant work practices.

Chapter 5, broadcasting rights, required more of a work around as questions about how rights are constructed and valued are subject to acute commercial sensitivity. Research sources include (a) published Business Reports, including media providers and sports federations, (b) copyright law, including case reviews in professional journals and (c) regulation and competition authorities. I have added field notes and contributor testimony

when these are free from non-disclosure agreements. Issues surrounding broadcasting rights include an examination of how rights are defined and how media providers respond to auctions. Of course, some rights issues can also be backtracked from the point of production, so the evidence of producers and senior executives was helpful.

Chapter 6, regulation and competition, continued the methodology used in chapter 5 but references additional sources such as formal reports, findings and legislation. As noted, there has been some useful new literature on this subject including Smith (2009) and Evens, Iosifidis and Smith (2013). The chapter also considers a range of regulations that *directly* impact on sports production but that are seldom discussed, including regional production quotas and the impact of Transfer of Undertakings (TUPE).

### **Part three methodology**

Part three considers the challenges faced by broadcasters as a consequence of increasingly influential pre-production factors. Testimony from senior managers, producers and directors was important. However, as noted, day-to-day field notes and shorter more subject-specific interviews tended to yield more relevant results than general interviews. Annual reports from broadcasters and independent production companies have also been referenced, as are specific industry reports. The fieldwork considered testimony up to the end of 2013, including experience from the 2012 EURO Championships, the 2012 London Olympic Games and Paralympics Games, The Premier League Channel, UEFA Champion's League, Champion's League Week and FIFA Futbol Mundial.

As with part two, the new fieldwork comprises semi-formal interviews conducted with a range of contributors. A personal touch provided the most viable approach therefore semi-structured interviews in a free format were preferred. The interview style can be described as conversations with a purpose, following Lindlof (1995). According to Dilman (1978), questions can be grouped under four headings:

- 1) Behaviour, what do people do.
- 2) Beliefs, what do people believe to be the case.
- 3) Attitudes, what people would prefer to be the case.
- 4) Attributes, background information, such as age and experience.

The interviews were held in the contributors' place of work, but Skype was also used occasionally at the contributor's request. Importantly all contributors were provided with anonymity due to the sensitivity of some issues discussed. Contributors received an assurance that all subsequent media (recordings and transcripts) were restricted to password accessible hard-drives that were not connected to third party networks. As noted anonymity was a critical condition to ensure trust and provide as candid a response as was practical. Contributors included broadcasters, managers from leagues and federations and a large number of producers, including many in senior positions. Across approximately 50 contributions the most experienced and influential people were sought. Anxiety was more noticeable when discussing the roles of federations rather than immediate employers. On occasion a lack of confidence in discussing wider issues was apparent. The research allowed contributors to identify the factors that they thought had the most impact. For example, talking with producers highlights the importance of technology in their workflows including media

servers as an integral part of a fully digital workflow revolutionising outside broadcast work and host broadcast operations. Or, recognising how much their role has changed raised the topic of increasing levels of supervision, including new roles such as production management, as producers' activities have moved from general management to more focussed creative and editorial roles.

In the literature, Barnett (1990), Whannel (1992) and Tunstall (1993) all used broadly similar methodology; a primary difference is the need, today, for personal confidentiality. However, the experience of those involved in making the final sports programmes we see adds an important supply side perspective to the larger battle for control of sports broadcasting.

Considering the literature, Boyle and Haynes (2000:38) suggest "a history of sport is often presented as a history of televising sport", to what extent this is true is reviewed in chapter 2.

## 2 | Literature

This chapter includes the literature review and a discussion of arguments relevant when using political economy to interpret television sports, particularly the under-reviewed production supply side. The chapter also provides contextual and conceptual parameters for the research including, in particular, the increase in critical pre-production factors prior to the production of programme output. The chapter deals with transformations in economics and politics, broadcasting policy and technological transformations, before considering media and sports economics followed by regulation and competition.

### 2.1 Literature review

#### Media studies and televised sport

In UK-oriented media studies, literature on televised sport prior to the 1980s is rather limited. However, by the early 1990s a more systematic approach becomes evident whilst, in the new millennium, a more focussed political economy interpretation took shape.

#### Transformation

Towards the end of *Sport and the British*, Holt (1989) discusses sport on television, particularly the role of television as a “non-neutral provider of images or a mere facilitator”. For Holt television has “increasingly determined the manner in which high-performance sport is played and

presented to the public", (1989:317); the idea of *transformation* is introduced to media-sport research.

In their follow up study Holt and Mason (2000) reflect a growing interest in the symbiotic relationship between sport and television. Televised sport was becoming more real than the event itself, for example Wimbledon was a television event in itself (2000:100). Surveying commercial developments that link sport and television, Holt and Mason concluded that sport could no longer be "confined by time and space" and that: "Spectator sport and the media have fused together. The one is inconceivable without the other." (2000:120).

Research into the transformation of sport via television and the subsequent cultural implications gathered pace from the late 1980s as Goldlust (1987), Whannel (1992), Wenner (1992) and Rowe (1995) all added to the debate. It is generally agreed that Whannel's *Fields in Vision* (1992) represents a landmark study.

Whannel (1992) argues for a schematic split between (a) textual/semiotic and (b) socio-economic practices and the political organisation of the media. So, in addition to political economy Whannel adds textual analysis and ideology, as he examines both the political and economic structures of the media-sport relationship as well as its mediated representations. However since Whannel's work was published in 1992 there has been a remarkable increase in the volume of televised sport. This raises difficult questions for textual studies, particularly the selection of a representative text to analyse – by 2012 BSkyB was providing 35,000 hours of programming per year

across four channels (Evens, Iosifidis and Smith, 2013:111), so what text is selected and why becomes challenging. Consequently, textual studies are not pursued in this research. However, insights into the commodification of popular culture by capital are certainly relevant. For Whannel (1992) the relationship between sport, television and sponsorship has (a) reshaped sport as a cultural form and (b) reflects deeper economic and cultural shifts in society insofar as the sports-television relationship reproduces power relations that exist elsewhere in a capitalist society.

Providing an alternative view, Goldlust (1987) and Barnett (1990) chose an empirical approach for their analysis of the structural aspects (political and economic) of the relationship between sport and television. Goldlust sets the tone: "to those who appropriate sport as their own property, it is just another potentially lucrative entertainment commodity" (Goldlust, 1987:171). Many of the issues raised by Barnett (1990) – for example, the willingness of sport to adapt its rules to suit television, the influence of commercial sponsors and the way technology has changed the way sport is presented – are still relevant. Barnett's approach gets closer to sports production than many, so it is an important reference. It also contains the most useful US-UK comparisons albeit framed with some reservations. Where Barnett is concerned with the *addition* of contrived narratives, the argument here notes the *subtraction* of critical comment from coverage. Reviewing developments from the early 1980s, Whitson (1998) recognised that sport in the UK was becoming firmly positioned within the broader communications strategies of corporations and identifies "a new kind of corporate integration in the media and entertainment industries" (1998:59).

Herman and McChesney's contribution to understanding a market-oriented global media is significant and is considered in more detail below.

### **Commercialism and capital incursion**

By early 2000 transformation remained a prominent theme as discussion became more closely framed on the ever-increasing commercialisation of sport and the mutual interdependence of sport and television. Boyle and Haynes (2000, 2004) have done much to drive the debate. *Football in the New Media Age* (2004) pointed Haynes towards a further study, *Media Rights and Intellectual Property* (2005) including a specific chapter on sport and intellectual property rights. Boyle and Haynes argue that the last thirty years has seen a tightening of the stranglehold that sponsors, in conjunction with television, exert on major sporting events. For them a sporting triangle has formed between television, sport and sponsorship; this description is unmistakably reminiscent of Whannel's 1992 explanation. The argument is: whilst appearing to be an adjunct to the advertising industry, British sport has undergone a series of rapid and dramatic transformations. More sophisticated marketing and promotional strategies have been introduced by sporting bodies keen to attract the interest of television and by the television companies themselves who want to maximise the return on their significant investment in sports broadcasting rights. All this, say Boyle and Haynes, "reflects a mode of organisation that is more akin to the long-standing consumer-orientated configuration of sport in North America" (Boyle and Haynes, 2000:66). For such an important idea it is a pity that they did not develop this discussion further.

Whilst Boyle and Haynes discuss television's view of sport as "another part of its entertainment programming that delivers potential audiences to advertisers, and attracts subscribers to new delivery systems" (2000:66) they do not explore important parallels between developments in the US and the UK. This suggests that whilst political economists paint an informative big picture, when it comes to providing a detailed understanding of increasing pre-production factors that do much to shape subsequent output - such as technology, broadcasting rights and regulations - the explanations become more sketchy and incomplete. There is no comparison between the development of sports broadcasting in the US and UK, how this is reflected in the value of sports broadcasting rights and, in turn, is subjected to broadcasting policy and regulation. This surprising gap in the literature is addressed in chapter 3.

Considering growing commercialism, Giulianotti (1999, 2005) is broadly sympathetic to Boyle and Haynes as he identifies television as the biggest influence on football's political economy; the medium of television makes brand marketing a mass possibility. The conversion of football's governing cultural institutions into corporate institutions is so apparent for Giulianotti that the process should be obvious to any observer. On a similar theme, Falcous (2005) constructs another sporting triangle, this time a configuration of corporate, media and sport interests. The accelerated phase of corporate-media-sport alignment has resulted in sport being linked with more instrumentally rational approaches to capital accumulation. Falcous brings together strands from Barnett, Whitson, Boyle and Haynes and Herman and McChesney as he charts how the commercial character of

British sport underwent an unprecedented acceleration during the 1990s.

The essential points to note are:

- a) The reformulation of the structures, ethos and governance of commercial sport in Britain.
- b) That such shifts are situated within wider processes of heightened global interdependence (where developments in the economics, technology and regulation of media delivery are central).
- c) The consequences for sport include realignment with the interests of corporate investment and the managerial tenets of advertising, marketing and public relations.

The new objective for elite sports like Premier League football, crudely, was to jettison what couldn't make money, as economics became the primary measure of value. Whitson (1998) also notes the emergence of these characteristics represents a new stage in the commodification of sport, "such that it may be gradually detached from meanings based on place attachments and loyalties" – an echo of Holt and Mason's (2000:120) conclusion that sport could no longer be "confined by time and space".

Boyle and Haynes (2004:2) express an interest in football on 3 levels, "*as a cultural form; football as an industry and business and football as a media product*. It seems to us, that at certain moments the game is clearly one of these, at others, it can appear to be all of these." In a similar vein, Mason (1999) considered what the sport product might be and who buys it. Mason notes (1999:403) that: "sport has commodified, as it has become increasingly bound up in the processes of economic production and

distribution". In terms of the sport product Mason sees 4 categories of relationships: (1) the sports fan, (2) television and other media, (3) communities that construct facilities and support local clubs [mainly a US phenomenon] and, (4), corporations that interact with the leagues and teams.

The focus of this research is firmly based on elite sports, particularly football, as a *media product*. It is accepted that this limits discussion, for example it does not fully represent cultural factors, nor are the recent extension of personal, on-demand and social media aspects considered, in 2014, to displace the central significance of television as the dominant media product. Efforts by federations to extend control over television coverage are the central interest; the distinction between international coverage and localised presentation is a further important consequence.

Of interest to Nauright and Schimmel (2005) is the accelerated expansion of transnational capitalism and its extension into the sport/cultural realm and media-sport. Among the key ideas are (a) the expansion of neoliberal ideology, (b) vertical integration of media and sports markets, (c) competition for capital investment at all geographic levels and (d) brand-name marketing of sport and sport-related goods and services. Schimmel reiterates the importance of the corporate-media-sport alignment and how such mutually beneficial alliances "accelerate the commodification and commercialisation of sport and, aided by recent advancements in production and communication technologies, deliver sport product on ever increasing scales to international consumers" (Schimmel, 2005:3; Hargreaves, 2002 and Miller *et al*, 2001).

Evens, Iosifidis and Smith (2013) provide a timely contribution as they note 3 phases of broadcasting in the UK – (1) public service regulated monopoly/duopoly operating under conditions of spectrum scarcity, (2) the emergence of new broadcasting delivery systems between 1980 to the mid 1990s with the end of public service duopoly and the introduction of commercial competition and, (3), the transition from analogue to digital, including (potential) convergence with new delivery platforms including the Internet and mobile phones. In reviewing the political economy of television sports rights they make a strong case for a “regulatory approach that seeks to balance the commercial priorities of broadcasters and sports organisations with the wider social and cultural benefits citizens gain from free-to-air sports broadcasting” (Evens, Iosifidis and Smith, 2013:223). The case of US sports broadcasting is used to demonstrate that free-to-air terrestrial television can serve the interests of leagues, broadcasters, advertisers, sponsors and viewers alike.

In very general terms, the literature deals with the behaviour of leagues and federations as seen in the commercialisation of sport, the marketisation of broadcasting and the behaviour of broadcasters and media providers as they seek market power in respect of their own platforms and, more recently, an increasing number of political economy accounts of reasonably wide-angled issues, such as football in the digital age and the increasing impact of broadcasting rights, competition law and regulation. What is missing is a frontline account of how technology, rights and regulation *together* influence broadcasters, media providers and producers, in other words how these wider transformations are manifest in day-to-day workplace practices.

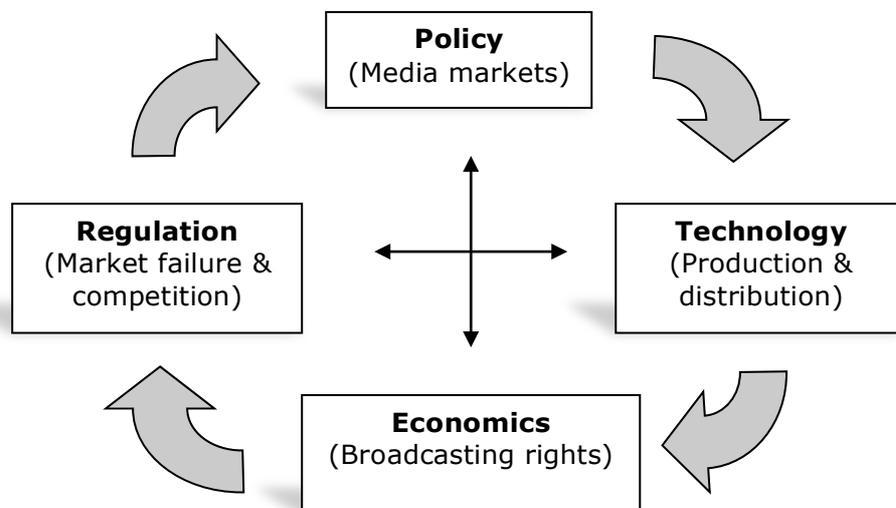
Tunstall (1993:71) argued that sports producers found themselves working in a “business partnership” with sporting bodies. Explaining how this happened, and to measure the extent of the radical transformation of sports television production since the early 1990s, is a central aim of this research.

## 2.2 Further context

Thinking about how to address gaps in the literature, ideas about transformation and value were recurring themes, particularly as expressed as a political economy view.

Sports broadcasting professionals virtually all agree that developments in technology (both production and distribution) are often re-articulated in broadcasting rights, usually following a cycle behind (typically 3 years). Competition to acquire rights is often mitigated by industry regulators following a further cycle of rights behind developments; regulators and competition authorities seek to echo the prevailing media policy.

Figure 2.1, Policy technology, economics and regulation



In terms of the increasing influential pre-production factors in television sport – technology, broadcasting rights and regulation - this interpretation is a reasonable context from which important transformations in (a) economics and politics, (b) broadcasting policy, (c) technology, (d) media and sports economics and (e) regulation and competition can be examined.

### **2.2.1 Transformations in economics and politics**

Changing ideas about value lie at the heart of sports broadcasting rights. Media providers purchase popular sports broadcasting rights to attract large audiences or to drive take up of pay-TV subscriptions and other revenue generating services. Increased competition to acquire rights has resulted in a dramatic escalation in their economic value. The economic value now attached to broadcasting rights differs from the wider historical, cultural and social values previously attached to sport, particularly in the UK and Europe. In some cases, media regulation attempts to re-introduce these values.

#### **Defining value**

Value, even in economics, is not a fixed term. How we define value changes with the prevailing political climate. For example, from the late 1970s value-creation rather than production (manufacturing of goods) became a “guiding light of economic activity” (Harvey, 2005:32). Creating conditions that were good for business shaped ideas about value, including the promotion of economic value above all others. Consequently, Gilpin (2001:40) calls for awareness about how (a) economic markets work, (b) how market forces affect economic outcomes and (c) how powerful actors attempt to manipulate market forces to advance their private interest.

For elite sports broadcasting rights, value is also linked to desirability (football can attract audiences, advertisers and sponsors for broadcasters), but arriving at a sustainable value introduces risk for broadcasters.

Economics assumes that the free market will produce the right amount and variety of goods by an invisible hand even though the market appears to be chaotic and unrestrained. Gilpin (2001:54) calls this the "self-regulating and self-correcting smoothly functioning machine"; critics call it a non-system.

The free market for sports broadcasting rights has shown little inclination to become self-regulating as values continue to rise, even in times of economic austerity and recession. Critics also question whether the market provides sufficient cultural and social value, for example Giulianotti (1999, 2005) and Falcos (2005) note that in football's rush towards corporatisation and financial gain many traditional cultural and historical values were jettisoned, a position often taken by EC competition authorities when considering market failure.

### **The rise of neoliberalism**

Ideas about value began to change post World War II under the growth and stability provided by embedded liberalism (Harvey, 2005). However, mathematic formalisation and abstract modelling, adopted in the 1960s, changed the character of economic thought (Gilpin, 2001)). In the 1970s there was an emphatic turn towards neoliberalism as capital was dis-embedded from the web of social and political restraints that had surrounded market processes. Castells (2000:59) argues this was a "new model of accumulation in historical discontinuity with post-World War II capitalism" whilst Polanyi (1944) considered stripping away market restraints would result in freedom becoming "a mere advocacy of free

enterprise". By the 1980s Castells (2000) notes the prominence of service-based economies.

With its policies of deregulation, privatisation and the withdrawal of the state from many areas of social provision, neoliberalism soon became incorporated into the common-sense way the world was understood. Harvey (2005:159) argues the neoliberal project engages in "accumulation through dispossession" as it promotes private property rights<sup>1</sup>. In the late 1970s, under Thatcher and Reagan, neoliberalism helped pave the way for the "deregulation of everything" (Harvey, 2005:26). Neoliberalism marks a new phase in economic globalisation, as it:

... emphasises the significance of contractual relations in the market place. It holds that social good will be maximised by maximising the reach and frequency of market transactions, and seeks to bring all human action into the domain of the market. (Harvey, 2005:3).

Under neoliberalism relationships were increasingly defined by contracts, commodification was unrestricted and everything was financialised - the only value that really mattered now was economic value. Gilpin (2001) identified a new economic paradigm during the 1980s and early 1990s in the United States, emphasising (a) deregulation, (b) open markets and (c) minimal government intervention in the economy and (d) the spread of American-style equity culture. For Castells (2000) US corporate culture was suited to embrace the digital revolution of the 1990s. This culture was widely adopted in the UK.

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<sup>1</sup> The extension of private property rights influences the value of those rights and provides protection (through patents and copyright) that encourages investment in new technology.

## **The transnational corporation**

A key actor in the new economic paradigm is the transnational corporation (TNC). For Herman and McChesney (1997:13) TNCs were the “new missionaries for corporate capitalism”. The rise of the TNC-led new order helped to institutionalise a wide range of commercial practices and values, including the demand for minimal government intervention, improved communications<sup>2</sup>, promotion of free market ideology, the advancement of advertising culture and the provision of a favourable environment for advertisers and sponsors. In the emerging US television market, advertisers and sponsors were attracted to the large audiences and demographics delivered by sport.

Also of note is product differentiation in trade<sup>3</sup> (Ravenhill, 2005), a repercussion is an extension of legal protection via intellectual property rights, trademarks and copyright. Protection became a central concern of powerful TNCs during the 1990s just as competition to acquire and control sports broadcasting rights entered a new era of intensity.

## **Changing the rules**

With more emphasis being placed on value creation *restructuring* plays a significant role in the neoliberal project.

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<sup>2</sup> The central importance of new technology in determining trade patterns is also emphasised by new theories of growth, economic location and strategic trade. Key technological advances revolutionised communications and began to reshape every aspect of social, political and economic affairs. The material form of this advance was determined by the needs and ambitions of the TNCs. Castells (2000:69) analyses the role of new technology, including market driven innovation.

<sup>3</sup> Such differentiation tends to be *intra industry*, such as Volvo cars versus BMW cars, or English Premier League football as compared to Italy’s Serie A.

Restructuring of business firms, and the new information technologies, while being at the core of globalising trends, could not have evolved, by themselves, toward a networked global economy without policies of deregulation, privatisation, and the liberalisation of trade and investment. (Castells, 2000:147).

Harvey (2005:157) adds that the privileges of ownership and management of capitalist enterprises became fused together; the payment of CEOs (managers) in stock options (ownership titles) led to stock values (value creation) rather than physical production becoming the “guiding light of economic activity” (Harvey, 2005:32). Castells (2000:156) adds that “the profitability of a firm or economic activity is no longer enough on which to base valuation”, and... “It looks like greed is now expressed more directly in value creation through the expectation of higher value – thus changing the rules of the game without changing the nature of the game” (2000:160). In 1992, the top flight of English league football was radically restructured along corporate lines; the new game was profit.

### **Oligopolistic competition**

As ideas about value were changing, so were markets and competition. According to strategic trade theory (Brander and Spencer, 1983), TNCs are usually involved in an oligopoly, markets where there are a small number of suppliers (such as media markets) and where one supplier’s actions can have a significant impact on its competitors. This, explain Gratton and Solberg (2007), provides TNCs with noticeably more market power compared to a situation of perfect competition, but not as much power as in a monopoly. Shifts in market power between buyers and sellers are

extremely important in framing the relationship between media providers and sports.

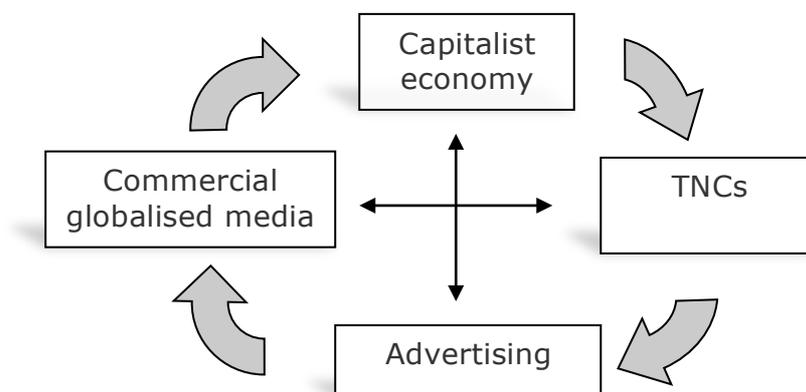
Oligopolistic conditions encourage TNCs to engage in strategic behaviour, including anticipating the behaviour of their competitors. That TNCs seek to earn profits is given, but less obvious are TNC efforts to leverage their market power to change the rules governing trade and competition in order to improve their long-term position. Here it is worth remembering Gilpin's call to understand how powerful actors attempt to manipulate market forces to advance their private interest. Strategic Trade Theory argues that a government can take specific actions to help its own oligopolistic firms. Such action, in turn can lead to pre-emptive investment by the TNC, or adoption of a first-mover strategy – this includes adjusting their prices (including dumping, or selling below cost to drive out competitors) to capture a much larger share of the market than would be the case under conditions of perfect competition. Rupert Murdoch and News Corporation adopted first-mover strategy as it sought to establish satellite broadcasting in the UK in the early 1990s. The British government encouraged such competition under the 1990 Broadcasting Act. Harvey (2005:203) points out "the idea that the market is about competition and fairness is increasingly negated by the fact of the extraordinary monopolisation, centralisation, and internationalisation of corporate and financial power".

### **Economic globalisation and global media**

"The crucial change for global capitalism, which laid the groundwork for the rise of the global media, was the emergence and ascension of the transnational corporation (TNC)" write Herman and McChesney (1997:13).

In other words, global capitalism, TNCs and the formation of a commercial market-oriented global media are linked; the global media is “a very recent development reflecting to no small degree the globalisation of the market economy” (1997:10). Herman and McChesney identify television as the most important media technology to emerge post-World War II. They also highlight advertising as a pivotal industry in the globalising process, noting the post-World War II US television boom was funded by advertising revenue. Reviewing the central role of advertising we see various themes come together: advertising “is a defining feature of late capitalism, reflecting the rise of product differentiation and oligopolistic competition” (1997:21).

Figure 2.2, Economic globalisation and global media



For Herman and McChesney a growing market-oriented globalised media was a key part of economic globalisation. By 1990 a global media market with its own logic and dynamics had emerged.

The crucial incursion is the implantation of the model [of commercial television]; the secondary developments of importance are the growth, consolidation, and centralisation of the commercial systems, their increasing integration into the global system, and the

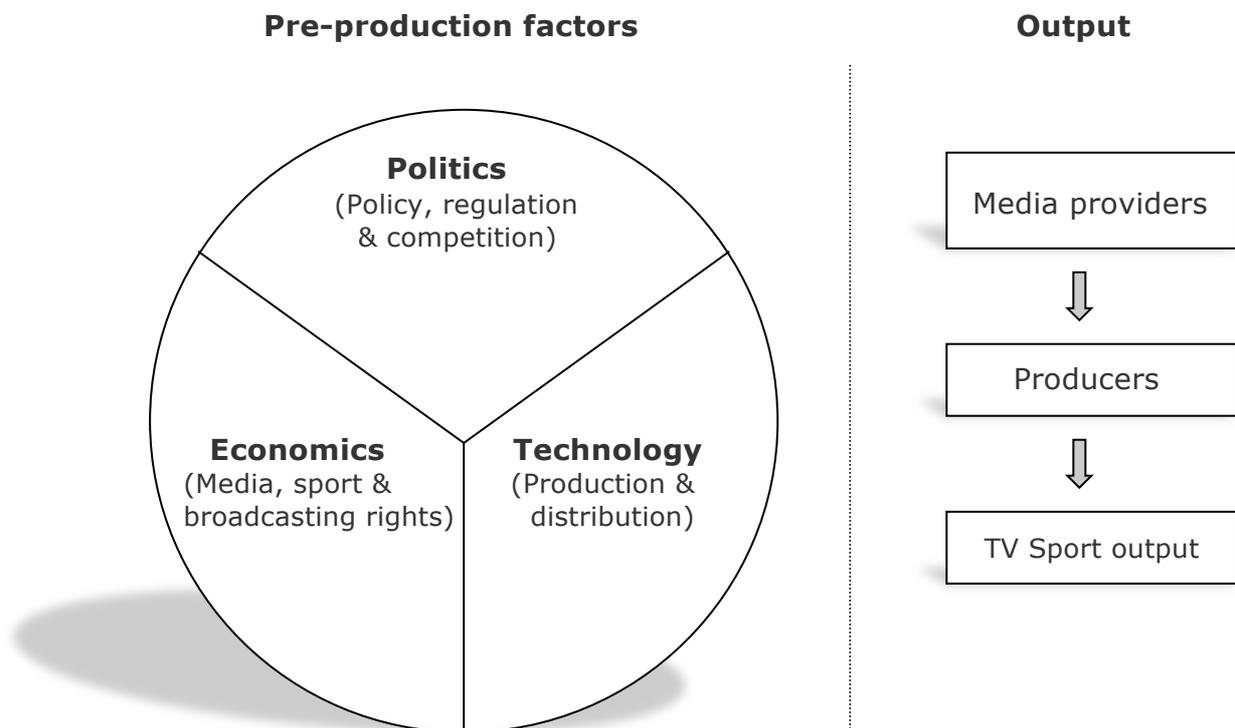
gradual effects of these processes on economies, political systems, and the cultural environment. (Herman and McChesney, 1997:142)

McGrew (2005) identifies the underlying forces behind economic globalisation as:

- a) *Politics* (ideas, interests and institutions)
- b) *Economics* (markets and capitalism)
- c) *Technics* (technological change and social organisation)

In other words, we might view influential pre-production factors that help define television sport output like this:

Figure 2.3, Pre-production factors



The ways we think about value have been completely transformed since 1945; the importance of cultural and social value has diminished as the

importance of economic value has risen. Broadcasting markets have been transformed and the implications for sports broadcasting are far reaching.

### **2.2.2 Transformations in broadcasting policy**

For Owen and Wildman (1992:1) few industries have been as revolutionised by regulatory reform and technological change as the television business. Government policy initiatives and regulatory measures, Doyle (2002:161) reminds us, strongly influence the economic performance of media markets. Key stages in the transformation of television sport are linked to wider media policies including deregulation in the US and UK and to technological changes that challenged established methods of television distribution and addressed basic market failure. Television sport is very often at the frontline of such changes.

Considering media policy the US Federal Government (followed by the Federal Communications Commission) licensed frequencies in a system of broadcasting that, for Owen and Wildman (1992), continued the concentration of economic power that had evolved in radio broadcasting. Corporate interests had been quick to grasp the commercial potential of radio as an advertising-funded medium<sup>4</sup> and, according to Herman and McChesney (1997:14), large corporations used political leverage to seize control of the television industry before a public service system could be established. The economic forces that favour mass consumption of media messages are reinforced by the simultaneous production of audiences for sale to advertisers as a dual output (Owen and Wildman, 1992:151; Picard,

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<sup>4</sup> Selling programmes to sponsors was an early solution to market failure, a way to collect value from broadcasts.

1989). Consequently, advertising fuelled the US television boom of the post-War period. As with any oligarchical system, argue Owen and Wildman (1992:16), a myth of social responsibility evolved; the myth (that US audience interests were served rather than those of advertisers and shareholders) helped to rationalise the privileges of the wealthy few. And those few were the major US networks whose dominance and economic self-interest was protected by the FCC (through restrictions placed on granting broadcasting licenses).

Addressing basic market failure in the UK a public service broadcasting (PSB) system was adopted, with funding provided via a licence fee paid by the consumers of broadcasts. The BBC, argue Curran and Seaton (2003), was founded on a rejection of market forces and politics insofar as the British government considered that broadcasting demanded a new form of administration with social and not financial priorities. The UK government established the publicly owned BBC as a vertically integrated programme maker, channel provider and broadcast distributor (Szymanski, 2006).

Television in the UK was developed as a monopoly and, as Owen and Wildman (1992) note, there is a sharp distinction between the behaviour of a monopolist and the behaviour of a competitive industry.

With such contrasting starting points – in the US, professional sports broadcast on commercial advertising-funded networks and, in the UK, amateur sport aired via a public service monopoly – how, by the early 1990s, the UK had gravitated so far towards a more US consumer-oriented model for sports broadcasting, to the extent that it is the similarities and

not the differences that stand out, is a relevant argument. The deregulation of broadcasting markets played a crucial role in the US and the UK.

### **Deregulation in US broadcasting**

Until the early 1970s the Federal Communications Commission (FCC) had protected the networks (NBC, CBS and ABC) from external competition during a period marked by increasing demand for national audiences by advertisers – less competition and more income was an attractive formula for the networks. FCC protection took the form of highly restrictive regulations on cable operators in 1966, 1968 and 1971 and also on pay-TV. However, the political foundations of the networks' protected position began to unravel in the early 1970s. As part of a wave of wider neoliberal reforms, the cost of national video distribution to broadcast and cable outlets began to drop following the FCC's open skies policy for domestic communications satellites. The regulator then made it illegal for the broadcast networks to continue to provide financing (to produce television series) in return for a share of the back-end profits, usually from syndication. By 1972 the networks were forced to divest all their interests in syndication businesses. In 1974 an FCC antitrust lawsuit restricted in-house production of network prime-time entertainment series and option terms for rights and, in 1975, the FCC's prime-time access rule became effective. Together, these reforms are often referred to as the *FinSyn* rules.

Significantly the artificial scarcity of spectrum - that had been an original barrier to entry in broadcasting - was no longer effective in protecting the networks from competition. The gates were beginning to open. In the second half of the 1970s the courts overturned the FCC's restrictions on

pay-TV, including most of the remaining restrictions on cable television (Owen and Wildman, 1992). Among the consequences of this political activity the broadcast networks turned more of their attention towards producing in-house sports and news programmes, activities that were not restricted by regulation policy. The rise in popularity of the NFL on US network television during the 1970s is, at least in part, a consequence of broadcasting deregulation and the *FinSyn* rules.

### **Increased competition among US media providers**

As FCC regulations concerning cable networks in the USA became less restrictive two new channels entered the market: in 1976 it was Ted Turner's Turner Broadcasting (TBS) and, in 1979, Bill Rasmussen launched the 24 hour-a-day cable sports broadcaster ESPN<sup>5</sup>. In the late 1970s and early 1980s competition among the 3 major US networks intensified with the emergence of new cable networks. Whilst the arrival of CNN, and later CNN Headline News, triggered an overall increase in news production, TBS and ESPN signalled important shifts in the relationship between sports and television in the USA. For example:

- 1) There was an immediate increase in the demand from media providers for broadcasting rights for a wider variety of sports to fill longer on-air schedules.
- 2) The established terrestrial broadcasting paradigm was altered by the addition of new delivery platforms that bypassed the existing networks and their advertising sales divisions.

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<sup>5</sup> Turner purchased the Atlanta Braves Major League Baseball franchise to provide cheap programming for his network, whilst Rasmussen purchased a continuous 24-hour satellite feed because it was cheaper than buying separate blocks of time.

- 3) Cable provided a technological solution to long-term market failure insofar as it introduced a means of charging and collecting revenue directly from customers via subscriptions. In economic terms, the willingness-to-pay of cable customers was, in some cases, now greater than the willingness-to-pay of advertisers.

In commercial television advertiser-valuations of the audiences generated by programmes determine which programmes are provided, also known as product competition (Owen and Wildman, 1992). In a pay-TV model content is also determined by preference and is sold directly to viewers, consequently competition for viewers is based on a combination of product and price. A number of analysts, including Spence and Owen (1975, 1977) have argued in favour of a competitive pay-TV industry and point to the explosive growth in cable penetration and VCR ownership since 1975 as evidence of (a) viewers' willingness-to-pay and (b) a previously restricted market. However, Gratton and Solberg (2007) counter that US subscription-based channels have often been regarded as a *supplement* rather than as a full competitor to terrestrial free-to-air-channels<sup>6</sup>. This is an important point. For sport, the free-to-air US networks have retained a comparative competitive edge over the pay-TV channels because, as Jay (2004) points out, television sport is a medium for renting audiences to advertisers, so the ability to deliver large audiences combined with frequent breaks in play was a compelling package for advertisers. This helps explain why, in contrast to the UK, US Major League sports retain a strong presence on the free-to-air terrestrial broadcast networks where, as Evens, Iosifidis and Smith (2013:211) argue, demographics also play a role as "broadcasters

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<sup>6</sup> On arrival in the UK in 2009 ESPN described itself as a *supplemental channel* and not direct competition to Sky Sports.

bid for those rights that are in line with their branding position and relevant target audience". Szymanski (2006) adds, in the USA, that the structure of the sports broadcasting market, rather than regulatory intervention, has prevented a full migration to pay-TV platforms.

### **British broadcasting and deregulation**

Deregulation played a significant part in determining economic practice in media markets in the UK, particularly television sports. The Annan Report (1977) was an early victory for those who wanted to open up British broadcasting, including long-term restructuring and diversification. The 1984 Cable and Broadcasting Act<sup>7</sup>, followed by the 1986 Peacock Committee tried to soften the ideological importance of public service broadcasting (Haynes, 2005:70) and laid the foundation for the landmark 1990 Broadcasting Act. Describing British broadcasting as the last bastion of restrictive practices Prime Minister Thatcher wanted to reform the entire structure of broadcasting - the previously closed world of broadcasting was to be exposed to the rigours of the free market. In doing so, industrial and technological policy became the driving force behind broadcasting policy as its cultural remit was relegated in importance. The 1990 Broadcasting Act has been described as an enabling force for Rupert Murdoch's satellite broadcasting ambitions in Britain; satellite and cable systems were politically sanctioned to challenge the monopoly enjoyed by the terrestrial television networks.

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<sup>7</sup> Barnett (1990:33) noted the list of protected events was written into the Cable and Broadcasting Act 1984.

## **Direct satellite broadcasting in the UK**

Whereas new cable providers challenged the established US networks, in the UK a small satellite footprint and lower capital costs meant that competition to the BBC/ITV duopoly (in terms of sport at least) came from direct satellite broadcasting. With the launch of the Astra satellite in 1989 Sky gained a critical head start over the British Broadcasting Consortium (BSB) and, after accruing monumental losses in competition with each other, the two companies agreed to merge in 1990 to form British Sky Broadcasting (BSkyB). The launch of *Sky Sports* in 1991 caused a paradigmatic shift in the UK market by providing competition for the BBC and ITV – Boyle and Haynes (2004) contend that ITV was not fully commercial, so the arrival of BSkyB represented a new commercial era. And this was not the supplemental add-on broadcasting model created 12 years earlier in the US. Instead, this was all or nothing full-on competition. The goal of News Corporation, argue Herman and McChesney (1977:75), was to overwhelm other media giants and to dominate global television sport. The use of new distribution technology and the acquisition of exclusive broadcasting rights to the most popular sports were a key part of this strategy. Evens, Iosifidis and Smith (2013:46) add: “technological developments have intensified the battle for control over sports rights”.

In terms of policy-making and UK broadcasting, Smith (2009) regards the growth of the regulatory state as part of a general shift from government to governance associated with the withdrawal of the state from many activities as part of neoliberal thinking. Smith also identifies the increasing influence of EU level regulation and of competition authorities such as the OFT and Competition Commission. The scrutiny of competition authorities often

centres on the upstream activities of the leagues and federations as they sell broadcasting rights whereas, argue Evens, Iosifidis and Smith (2013), media regulators tend to engage with the downstream provision of programme content. A central concern of regulation is the control of market power – curbing monopolistic tendencies – in order to facilitate free market competition. Controlling market power in sports broadcasting, at least in the UK and Europe, is a recurring theme.

### **2.2.3 Technological transformations in sports broadcasting**

For Gilpin (2001:367) the contemporary technological revolution has been “far more pervasive and, in many ways, a much more profound development than is globalisation”. Technology has radically transformed the distribution (transmission) and the production of television sport. For the UK, Evens, Iosifidis and Smith (2013:198) identify 3 eras of development:

- 1) Public service regulated monopoly/duopoly (under conditions of spectrum scarcity).
- 2) 1980 to the mid 1990s the emergence of new broadcasting delivery systems, the end of public service duopoly and the introduction of more commercial competition.
- 3) The transition from analogue to digital with the introduction of more channels and new methods of delivery (Internet and mobile phones).

Following technological transformation, sport rapidly emerged as a core feature of media distributors’ strategies for market penetration (Herman and McChesney, 1997; Alger, 1998; Miller *et al*, 2001). Sport, more than any other form of media content, has been used as a weapon to break into

new markets, undermine competitors and ultimately dominate certain sectors of the media industry argues Haynes (2005:6).

For many observers the increasingly global impact of sport has been characterised by new services, including dedicated sports channels, new delivery systems and payment methods such as subscription networks and pay-per-view events. Discussing commodification, Mosco (1996) argues that new services:

... intensify the packaging of programming in increasingly customised forms from the original broadcasting form, which, by comparison, produced programming with limited specificity for a mass audience. The former intensify the commodification process by linking increasingly specific kinds of programming to increasingly well-defined audiences. (Mosco, 1996:152)

Whitson (1998) continues this theme by arguing that sport has been incorporated into a global promotional culture characterised by the push towards new revenue streams including the vertical integration of the communication and infotainment industries:

The growth of subscription television technology has heightened market value of sports events so that cross-ownership of competitions, teams and leagues can afford significant competitive advantages. Such sport-media cross-ownership affords further opportunities for promotional synergies. (Whitson, 1998:59)

For Boyle and Haynes (2000) sport offers a product to media industries that can be transformed into a valuable commercial entity delivering viewers, advertisers, subscribers and customers - "Sport, it appears, is often only too happy to oblige as a willing victim in this process" (2000:222). The

emergence of these characteristics, Whitson (1998) suggests, represents a new stage in the commodification of sport, such that it may be gradually detached from meanings based on place attachments and loyalties. So, in the place of, and supplemental to, geographical loyalties come the discourses of personal and consumer choice. This research will investigate an important split between federation-produced international coverage of major sports events and the localised presentation styles increasingly adopted by national broadcasters as they seek to differentiate their output from competitors.

In the UK, new methods of distribution, particularly digital satellite services, triggered questions about the relationship between monopoly and technological innovation, a relationship that is not altogether straightforward during periods of rapid technological change. As Doyle (2002) notes conditional access systems, including electronic programme guides, are often located centrally between service providers so they occupy what is potentially a very powerful position. Firms like BSkyB are in a position to act as gatekeepers and to decide who may or may not be allowed market access, or they can at least impose disadvantageous terms to potential competitors wishing to use their platform. This isn't exactly a free market.

Boyle and Haynes (2004:52) argue against technological determinism and for viewing developments within a wider structural process of marketisation, as the market becomes the central frame of reference for cultural activity. They add that along with a re-regulation of broadcasting within a more commercial and market driven frame of reference that digital television has

accelerated this commercial process. Whilst digital technology has enabled a dramatic increase in the volume and scope of television sports content, it is the different and often unseen ways that this technology has been used that is most revealing, including *who* is using it and *why* – how leagues and federations use technology to take control of televised sport output is a key contribution.

Economies of scope arise within the digital production paradigm as output increases due to the ability to recycle material in additional, new programme formats for minimal additional costs. For example, football review and preview programmes use the isolated camera feeds recorded as part of the original coverage to provide alternative views of the action. Such processes, argues Schimmel (2005:3) accelerate “the commodification and commercialisation of sport and deliver sport product on ever increasing scales to international consumers”. Mason (1999) takes the view that commodification is bound up in the processes of economic production and distribution.

For Doyle (2002) it is the expansion in the way in which television can be distributed to viewers that is significant. Whilst new means of distribution had begun to challenge the spectrum scarcity associated with analogue technology, the introduction of digital transmission accelerated the process dramatically. As a consequence scarcity in broadcasting switched from the means of distribution (from owning a television channel) to content production, or having sufficient competitive programming to fill these new channels and attract viewers. Here it is the ability of specific sports to drive the uptake of new media technologies and pay-TV services that is key.

### **2.2.4 Media economics, sport economics and broadcasting rights**

Boyle and Haynes (2000:74) alert us to how contracts, licensing and the controlling force of intellectual property have become central concerns in the organising principles of cultural industries. Looking at sports broadcasting, the shifting power relations between sports and media providers – the battle for control of rights - is revealing as is the intersection of media economics and sports economics, most often expressed in the form of sports broadcasting rights.

#### **(i) Media economics**

A fundamental issue for media providers is how to collect value from the audiences its programmes and schedules attract. Finding a solution to basic market failure led to very different funding methods being adopted in the US and UK, with a monopoly public broadcaster system funded by a licence fee chosen in the UK in preference to the advertiser-funded commercial free-to-air networks in the US.

In media production, although the cost of producing a programme is not affected by the numbers of people who watch it, there is a high first copy cost for the initial programme. However, the marginal costs associated with providing extra copies - in delivering the programme to a larger audience - are considered to be next to zero. In rudimentary terms this means the greater the audience for a media provider's content the lower the cost per consumer, this is particularly significant in the US market. For Picard (1989:17-19) media firms operate in a "dual product" market. The two commodities broadcasters generate are: (1) content (programmes produced or acquired and subsequently broadcast in recognisable schedules) and (2)

the audiences that choose to watch. Commercial television networks can price and sell access to their audiences to advertisers and sponsors, pay-TV providers use exclusive content to attract both subscribers and sponsors whilst PSBs like the BBC use audiences and demographics to justify the licence fee it receives.

### **Audiences matter**

For Herman and McChesney (1997:141) the outcome is a predominantly commercial system where “advertisers must be won and kept, along with a suitable audience”. Producing audiences and delivering them to advertisers is, for Mosco (1996:148), the primary role of media providers and even PSBs that “depend on user fees, government grants, commercial advertising, and government appointed senior management personnel, who are often required to demonstrate their ability to meet either political or market criteria for success” (1996:170). Predating Mosco and Herman and McChesney, Smyth (1977) sees the audience that is delivered to advertisers by broadcasters as the primary commodity. The ability of popular sports to consistently deliver audiences with more efficiency and demographic accuracy than other content genres, and the lack of viable substitutes, is critical to broadcasters. Speaking at an annual Commissioning Conference in November 2007 then ITV Controller of Programmes, Simon Shapps, said any new drama, or entertainment format<sup>8</sup>, that attracted over 5 million viewers for ITV would be considered a success. Between January and November 2007 over 40 sports events surpassed Shapps’ threshold. It can be argued that the ability of sport to attract audiences with regular sports

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<sup>8</sup> Entertainment formats including Pop Idol, the X-Factor, Britain’s Got Talent are often presented live, involve regional contestants and performances distinguished by uncertainty of outcome – all features of live sport.

coverage plus global mega-events, including the IOC Olympic Games and the FIFA World Cup Finals, has sustained the large free-to-air broadcasting networks as they continue to provide the easiest route to mass audiences.

### **Media market structures**

Sports broadcasting is dominated by large networks, Doyle (2002) confirms this is an oligopolistic market structure. Political economists including Herman and McChesney (1997) argue that broadcasting market structures lead to economies of scale, where the cost of providing an extra unit of a good (in this case a programme) falls as the scale of output expands (and the cost per viewer decreases). Economies of scope are also present due to savings that can be achieved by offering significantly increased output – for example creating new programme formats (from the same basic content) but for different audiences. In the case of football (which provides particularly malleable content) this might be highlights of action previously broadcast live in its entirety, a journalists' round-table discussion with clips, previews of forthcoming matches, nostalgia-based programmes, or further re-versioning of interviews and action in different programmes. Digital workflows significantly enhance economies of scope as they enable much greater output.

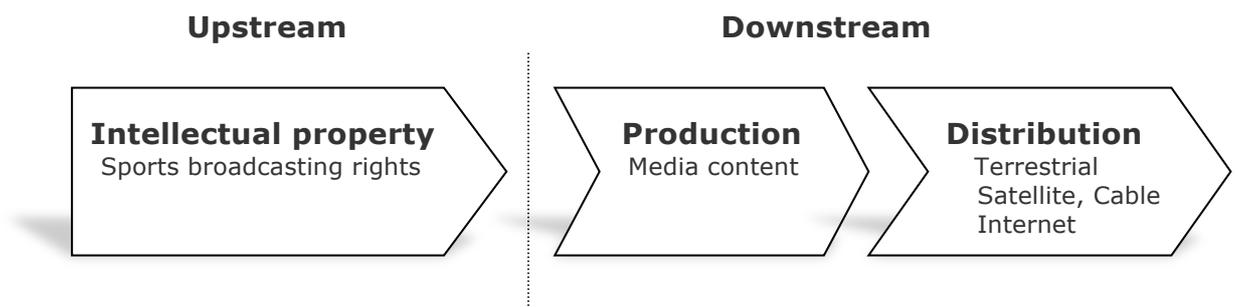
As economies of scale and of scope can be achieved, there are major advantages to be gained when a broadcaster becomes a very large size firm - competitive advantage is gained in (a) reaching the largest audience for each product and (b) in releasing the product in as many different markets as possible. Herman and McChesney concluded the global media are dominated by a small number of very large and powerful international firms

including News Corporation, Time Warner, Disney and Viacom. Another distinguishing feature of media markets is the substantial barrier to entry that favour the largest vertically integrated corporations. These barriers are primarily two-fold: (a) the high technical costs associated with the production and transmission of television networks including major sports events and (b) the rising cost of intellectual property including sports broadcasting rights.

### **The vertical supply chain for media providers**

Turning to the sports broadcasting value chain, Doyle (2002) uses vertical deconstruction to reveal a basic range of functions for media providers. These functions start upstream with (a) the creation (or acquisition) of intellectual property rights and work through succeeding downstream stages, including (b) the production of programmes and (c) its distribution (transmission) to the audience.

Figure 2.4, Vertical supply chain



With developments in technology a further function (d) should be included, which is the ability of media providers to collect value directly from audiences by means of subscriptions and pay-per-view services.

In the case of sport, a broadcaster would (a) acquire broadcasting rights from a League (e.g. BSkyB purchases rights from the Premier League), (b) produce programmes in accordance with the rights granted (for example the agreed number of games between selected clubs on given dates) and (c) transmit these programmes via their network again in accordance with the rights granted (for example, live broadcasts at specified times, delayed broadcasts, clip rights or highlights). Media firms can approach these basic functions differently depending on how they are funded, but typical funding models include:

- 1) Commercial free-to-air terrestrial broadcasters including the large US networks funded by advertising and sponsorship<sup>9</sup> without receiving a direct payment from their audience.
- 2) Free-to-air terrestrial PSBs that receive public funding. For the BBC this involves an annual licence fee set by government.
- 3) Free-to-air commercial-PSB broadcasters, like ITV, that generate revenue from advertising sales but that retain PSB responsibilities.
- 4) Cable and pay-TV services including direct satellite broadcasting. Media providers like BSkyB charge viewers directly at various levels of subscription to receive television services, they also offer pay-per-view (PPV) for additional content. Some cable and direct satellite television networks also sell advertising and sponsorship, but not all networks charge a subscription for access.
- 5) Further pay-content media services including Internet service providers (IPTV) and telephone platforms. Media providers like BT

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<sup>9</sup> Including individual segment sponsorship, product placement within programmes through to paid for infomercials.

have previously offered a basic low-cost subscription with additional pay-per-view and video-on-demand services.

Whilst the supply chain model is a useful reference the argument here is that influential pre-production factors, including technology, broadcasting rights and regulation, interact to further determine the final broadcast output in ways that are far from linear.

The common denominator for all broadcaster-funding models is attractive content. Haynes (2005:13) draws our attention to the increasing use of intellectual property rights in the everyday activities of media organisations and how such rights, particularly sports broadcasting rights, have become the most important assets in media markets.

Sports rights can be, and usually are, the flagship and distinguishing factor of a television station's brand identity, and are lost at their peril. Understanding why sport is so important demands knowledge of how the relationship between sport and broadcasting has developed and how the power relations between sports authorities and broadcasters have dynamically changed over time. (Haynes, 2005:68)

## **(ii) Sports economics**

Sports leagues and federations auction broadcasting rights. Sports broadcasting rights increasingly define the relationship between sport and broadcaster. Whilst media economics is well researched, sports economics is a distinct and separate field. However, it is hard to see how a political economy view of television sport can be complete without at least considering the ways that league behaviour, particularly as expressed in

sports broadcasting rights, influences the final output of media providers. This is a significant omission from contemporary literature.

### **The “peculiar economics” of sport**

Sport is a sector where many basic economic rules appear to be inverted. The essence of sports economics is captured by Neale (1964:14): “It is clear that professional sports are a natural monopoly, marked by definite peculiarities both in the structure and in the functioning of their markets”.

Scarcity, Fort (2006) reminds us, makes the economic world go round.

Looking at sport, scarcity can be said to exist in (a) elite athletic performance, (b) absolute and relative team quality, (c) the shared experience that sports provide and (d) the thrill of victory. When uncertainty of outcome for live sports events is added, it is hard for media providers to find an adequate substitute in other programme forms. And, because scarcity exists, Demand Theory says that rationing devices must be chosen and the most prominent rationing device is price. For the most popular sports, demand from media suppliers outstrips the supply from the leagues. Consequently the value of rights rises as a result of competition. Scarcity, rationing and competition represent an “economic trinity” (Fort, 2006:15).

Fort (2006), Quirk and Fort (1992 and 1999) and Dobson and Goddard [2007] have built on the work of sports economists Rottenberg (1956), Neale (1964) and Sloane (1971). Among other things, they agree that sporting competition is more profitable than sporting monopoly. For example, leagues are necessary to professional sport; a *single team* cannot

supply the entire market because it would have no other team to play. However, a *single league* can supply the entire market in conditions of a natural monopoly (Dobson and Goddard, 2007:5). Furthermore, competition between different sports is more common than competition between rival leagues within the same sport.

For Neale (1964) leagues engage in both single entity co-operation and joint-venture co-operation. Essential league activity – including determining competition rules, setting the schedule of games and organising match officials and so on – ensures that play can happen; this is single-entity cooperation. Neale highlights the relationship between single-entity action by leagues and profitable economic outcomes, naming it “the peculiar economics of team sports”.

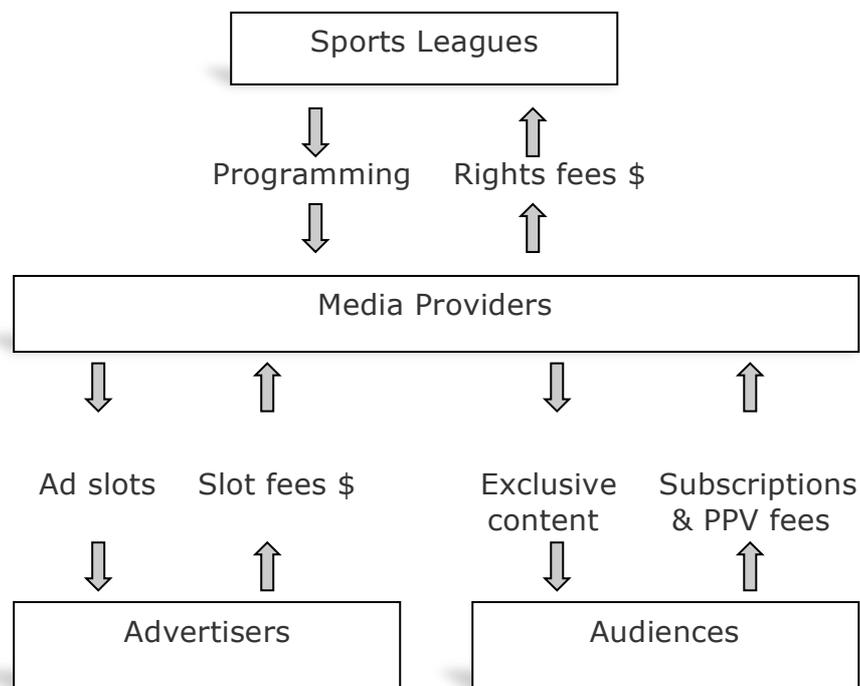
Joint-venture co-operation occurs where teams surrender part of their autonomy to the league to act on their behalf. The best example is when a league negotiates collectively on behalf of its member teams with media providers. In this case joint-venture cooperation results in an exercise of market power by the league, as media providers have no option but to negotiate with the league. Examining the sport product, including who it is marketed to and how, Mason (1999) considers the league to be an economic entity (in other words, a proper business entity).

In terms of economics, the revenue side of professional sport changed forever with the willingness of advertisers to pay for sports programming, the crucial importance of revenue from broadcasting rights was established (Fort, 2006:53).

### (iii) Sports broadcasting rights

Sports broadcasting rights are identified, constructed and auctioned by the sports governing body or their representatives. Not only do broadcasting rights express the economic value of the rights assigned, increasingly they have come to determine the relationship between the sport, media provider and the willingness to pay of advertisers and audiences. Fort (2006:60) provides a basic schematic to which a further category audiences (willingness to pay) has been added:

Figure 2.5, Willingness to pay in sports broadcasting rights



The programming opportunities offered by leagues to media providers within the assigned broadcasting rights include definitions of the:

- 1) Range of programme packages offered (number and type)
- 2) Distribution platform(s)
- 3) The broadcast territory
- 4) Period (duration) of the licence.

Fort's description highlights the relative disadvantage of PSB media providers when competing to acquire rights as they cannot (a) monetise the sports rights that they hold (by charging subscriptions for access) or (b) forecast potential advertising and sponsorship revenue to help calculate the commercial value of rights.

For Gratton and Solberg (2007) the collective sale of sports rights is an example of horizontal integration between suppliers of inputs (the clubs organised in a league). This is *cartel* behaviour, it is regarded as illegal in other areas of economic activity but it is widely practiced in the sports broadcasting rights market. Evens, Iosifidis and Smith (2013:90) provide a summary of arguments for and against league behaviour in respect of collective selling of sports broadcasting rights concluding, "the collective selling of broadcast rights is pro-competitive rather than anti-competitive and should be granted exemption from competition law" (2013:93). Considering that value arises from the creation of leagues and competitions, this research is in favour of the collective selling of broadcast rights by federations, agreeing that this is pro-competitive.

Although US leagues benefit from anti-trust exemption granted under the US Broadcasting Act of 1961, this is not the case in Europe. Consequently, the activities of sports governing bodies, including the Premier League and UEFA (specifically the UEFA Champion's League) when issuing rights has attracted the scrutiny of competition authorities. Evens, Iosifidis and Smith (2013:90) summarise the EC Competition Commissioner's objections as: 1) collective selling agreements amount to price fixing, 2) they limit the rights

available to sports events (there are more events than are broadcast) and,  
3) they strengthen the market position of the broadcaster that wins rights.

### **2.2.5 Regulation and competition**

As market forces increasingly shaped broadcasting markets in the UK from the early 1990s, in sports broadcasting intervention was twofold as it aimed to tackle market failure and market power.

#### **Market failure**

Welfare economic theory of broadcasting regulations identifies three sources of market failure that legitimise government intervention - public goods, merit goods and externalities. As the reception of TV signals is considered to be a public good, the argument for intervention considers that charging for television programmes introduces inefficiency because the fee deters some people from watching; charging also reduces the amount of goods in the public domain. Merits goods – goods that individuals would choose to consume too little of due to imperfect knowledge (Head, 1974) – are considered beneficial for the entire society, so there is a welfare economic rationale for government to intervene and to encourage the production and consumption of merit goods. For Gratton and Solberg (2007) this includes the enhanced pride and self-esteem that people enjoy when competitors have success in international sporting competitions. Externalities refer to incidental benefits, for example common sharing and feel good factors of the television coverage of the 2012 London Olympics and increased participation in exercise are externalities.

The migration of popular sporting events, like the Premier League, to pay-TV channels represents a disadvantage for those who cannot afford to subscribe. As profit-maximising channels will prioritise sports that attract mass audiences and pay-TV channels will provide programmes that a sufficient number of viewers are willing to pay to watch, then the optimal level of programming that will generate externalities and merit goods will be difficult to achieve and this failure, it is argued, justifies market intervention.

In the UK the best-known form of regulation is the protected list of events, or crown jewels in the annual British sporting calendar, identified in Section 14 of the 1984 Cable and Broadcasting Act, formalised in the 1990 Broadcasting Act and tightened up again in the 1996 Broadcasting Act. The protected list was conceived in the mid-1950s as a gentlemen's agreement to limit the newly established ITV from acquiring exclusive rights to the most popular sports. It remains a mechanism to ensure sporting events with a broad-based national interest, or resonance, are available to at least 95% of the population, effectively ruling out exclusive coverage on subscription-based broadcasting networks (Barnett, 1990:33).

The European Union Television without Frontiers Directive adopted the idea of a protected list in 1989 as it aimed to establish a single market in EC television broadcasting. The Europeanisation of UK listed events legislation is significant; it became part of the regulation of television sports rights in the UK, particularly from the late 1990s, and it also takes a stance against leading pay-TV broadcasters' domination of sports rights (Smith, 2009). In European regulation cultural and social values are also considered. Sport

cannot be reduced to just being an audience-generating mechanism; there is also a need to preserve the identity and independence of sport, EC (1999). EU law, part of the 2007 Audiovisual Media Services Directive (amending and renaming the Television Without Frontiers Directive), prevents satellite broadcasters from circumventing the UK's listed events legislation with a two-step safeguard for receiving countries. Advocates argue that the migration of major events like the FIFA World Cup Finals to pay-TV has been prevented by EU legislation. However, even supporters of protected events lists accept there is sometimes a lack of clear criteria against which to judge whether an event should be listed or not (Evens, Iosifidis and Smith, 2013:117).

Whilst the UK's protected list of events is periodically revised, sports federations do not always greet inclusion favourably. Most objections to inclusion come from federations that feel their access to the free market in sports rights is being restricted, or from pay-TV broadcasters wishing to purchase these rights. For example, in late 2009, the England and Wales Cricket Board (now the ECB) opposed inclusion on the basis it would reduce the economic value they could achieve for their sports broadcasting rights in a free market, in other words the fees they could receive from BSkyB. For Andreff and Bourg (2006) sports broadcasting has already become a private good, produced and consumed for profit in a fully-fledged market economy. Whilst, defending the public's fundamental right to be informed about certain sports events, Evens, Iosifidis and Smith (2013:120) point out (a) major event legislation is critical to enhance cultural citizenship and (b) the legislation is required alongside competition law as this, alone, cannot guarantee that rights to major sporting events are purchased by free-to-air

broadcasters rather than pay-TV broadcasters. Overall, this research supports a dual rights approach with the observation that, if they wanted to, sports federations could do more to address such issues.

In contrast there is no list of protected events in the US. The US Major Leagues have not migrated to pay-TV but, instead, have maintained a strong presence on the 4 commercial free-to-air networks. In this case the ownership of the rights to all 4 major leagues by any one broadcaster is, for cost reasons alone, unlikely. Szymanski (2006) attributes the US experience to 4 key factors including: (1) US viewers are interested in a wider range of sports (NFL, NBA, MLB and NHL), (2) the economies of scale in US broadcasting enable free-to-air broadcasters to pay high rights fees and recover these via advertising and sponsorship, (3) US sports are, through their playing rules, more sympathetic to the inclusion of advertising breaks than, say, football is and, (4) in the US regulation has been slower to allow significant competition from pay-TV broadcasters for elite sports rights (Szymanski, 2006:157-98). Another key difference is the US Sport Broadcasting Act of 1961. This Act exempted the collective selling of sponsored telecasting (cartel behaviour) from anti-trust legislation as authorities accepted the need for a governance structure including horizontal arrangements aimed at enhancing competitive balance. From this point forward sports broadcasting rights rapidly increased in value and, in 1996, the Telecommunications Act removed most price regulation. Whilst leagues in the US have, to some extent, limited the deregulation of sports broadcasting rights they have also adopted rules that, ultimately, maintain the value of their broadcasting rights. The three broad regulatory principles adopted by the leagues include, (a) a fair (equal) share of television rights

to all member clubs<sup>10</sup>, (b) salary caps for clubs and (c) a reverse-order-of-finish draft system for players entering the league (Desbordes, 2006).

Whilst there are occasional calls to apply similar systems in the UK and Europe, doubts remain about adopting a completely business-oriented closed system (in such a system a bad team can remain in the league as there is no relegation). However, with UEFA introducing the Financial Fair Play rule (FFP) in the Champion's League from 2013-14, there is an increased likelihood that US style salary cap measures may be adopted in some form. In general terms, Evens, Iosifidis and Smith (2013:228) conclude the US case illustrates that increased exposure and higher audience ratings via free-to-air television can serve the interest of teams, leagues, broadcasters, advertisers, sponsors and viewers alike.

### **Market power**

In addition to addressing market failure, further reasons for intervention are concerned with tackling monopoly and market power issues.

Since the 1980s changes to the market structure - from a scenario where analogue frequencies were scarce to a situation where appealing content is in short supply - caused an imbalance of supply and demand for exclusive sports broadcasting rights and a subsequent shift in power upstream away from the media providers (the buyers) to leagues engaged in horizontal collusion whilst selling broadcasting rights. As competition to acquire rights has intensified this has led to an upstream cartel. However, due to technological developments and the intervention of competition authorities

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<sup>10</sup> Revenue from broadcasting rights is not shared evenly between Premier League clubs.

there has, in the case of the Premier League at least, been an unbundling of available rights packages and a reduction to 3 years in the license period granted by the Premier League to broadcasters. Some observers, including Gerrard (2006), see it as paradoxical that the supposed deregulation of the sports broadcasting rights market should serve to enhance rather than restrict monopoly power.

Considering upstream market activities, sports broadcasting rights can be sold to (a) broadcasters, (b) groups of PSB broadcasters acting as joint-purchasers (the EBU is an example) or (c) sports rights-holding agencies such as Sportfive or IMG. As noted, US leagues are exempt from anti-trust scrutiny, whilst UK and European leagues are not.

The most common method of selling sports broadcasting rights is via an auction process. In the UK and Europe this process is subject to significantly increased attention from competition authorities: Ofcom, the Monopolies and Mergers Commission (MMC), the Competition Directorate of the European Commission and the Office of Fair Trading (from 31 March 2014 the OFT closed and responsibilities were split, with the Competitions and Markets Authority, OMA, bringing together the Competition Commission and certain functions of the OFT in a single body). In the downstream content selling market the EC states that in the free-to-air television market there is only a relationship between programme supplier and advertising industry, whereas in pay-TV the commercial relationship is established between the programme supplier and the viewer as subscriber (Fikentscher, 2006) - the willingness of audiences to pay for exclusive content. The analysis of demand for professional team sport follows the standard consumer choice

model with the caveat that uncertainty of outcome is a crucial feature, Noll (1988) and Quick and Fort (1997). In other words, live sports programmes are perishable goods that cannot be stored for any period without losing most of their commercial value; the high degree of time sensitivity increases the value of live broadcasting rights. Exclusivity is therefore acknowledged to be a condition of the product's value. It can be argued that media providers' wish to control high-profile sport content has been motivated by a desire to pre-empt competition. Strategic behaviour, including first mover advantages, can be anticipated as sports broadcasting is an oligopolistic market. The narrower the market, the greater risk that a dominant position will be considered to be an infringement of competition rules.

Whilst broadcasting rights to league sports are more evenly shared among the major US broadcasters in the UK, BSkyB quickly came to dominate the sports broadcasting rights market. BSkyB's rivals argue that the satellite broadcaster had established a vicious circle of control within the UK pay-TV market, whereby it is able to use its control of premium content to attract subscribers, which, in turn, enables it to obtain more premium content, (Smith, 2009:20).

To avoid anti-competitive practices and market foreclosure the Premier League and the UEFA Champion's League have been forced to offer several balanced packages of broadcasting rights in an open bidding process<sup>11</sup>.

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<sup>11</sup> In December 2002 the EC Directorate DG4 opened proceedings against the Premier League. The outcome saw 138 Premier League games split into 4 packages. BSkyB won all 4 but were informed the tender was not fairly contested and was instructed to sell 1 package. As the price agreed between BSkyB and the EC was not met BSkyB retained the rights. For

Rather than create a more competitive market for selling sports broadcasting rights the material outcome of this intervention was, from 2007 and in the case of the Premier League, an increase in the cost to viewers that wanted to access all live Premier League football available on Sky Sports and Setanta. Similarly, from the 2013-14 season fans needed subscriptions to both Sky Sports and BT Sport to see all the available matches. Whilst the material benefit to consumers is hard to identify, BSkyB's monopoly of live broadcasting rights for Premier League football was ended by the European Commission's competition authorities. However, in practical terms, BSkyB retained 5 out of 6 packages<sup>12</sup> (115 of 138 games) available in 2012. Although the Premier League has granted BT the rights to 38 live games (2 packages) from the start of the 2013-14 season, BSkyB has ensured its continuing dominance by retaining the rights to 116 games (5 packages).

Turning to the downstream market and content carriage, Ofcom challenged BSkyB in February 2010. Concluding a three-year review of the pay-TV market in the UK, the regulator found that BSkyB's dominance of the sports broadcasting rights market was against consumer interest and that Sky Sports packages should be made available at viable wholesale prices to other carriers – a wholesale-must-offer system (Ofcom, 2010). As Evens, Iosifidis and Smith (2013) update developments, a legal challenge by

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the period 2007-2010 the rights were split into 6 packages of 23 games each with Setanta winning 2 packages.

<sup>12</sup> With the collapse of Setanta, ESPN took over 2 packages of rights, but this was subsequently reduced to 1 in the next rights issue. In 2012 BT won 2 packages leaving ESPN with no rights from the start of the 2013/14 season.

BSkyB through the Competition Appeals Tribunal (CAT) declared Ofcom's core competition concern to be unfounded<sup>13</sup>.

As a result, whilst the supply of premium content to rival pay-TV outlets is likely to remain a controversial issue within the UK sports broadcasting market, particularly in the wake of BT's recent acquisition of Premier League football rights, for the foreseeable future at least the terms of supply for premium sports programming are set to be left to commercial competition. (Evens. Iosifidis and Smith, 2013:208)

## **Conclusion**

This chapter reviewed the literature and sought a relevant contextual and conceptual context for an updated political economy of sports broadcasting. The challenge was to address the increasingly influential pre-production processes that, together, have come to shape the broadcast output of television sport.

Key themes in the literature were transformation, value and the emergence of a sport-media-corporate axis following the expansion of transnational capitalism into media sport. It was argued that political economy remains most effective in framing the bigger picture and that more detailed research dealing with the significance of pre-production factors was scarce, as was a meaningful account of how such transformations impact on the supply side – the broadcasters, independent sports production companies, producers and directors that make the sports programmes we finally see.

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<sup>13</sup> On 26.04.2014 BT was granted appeal of the CAT decision, see BSkyB (2013:13).

Literature concerning the politics, technology and economics of sports broadcasting was reviewed, including how ideas about value have changed. Inspired by neoliberal ideas, marketisation has been pursued through 4 major policies including: privatisation, liberalisation, re-orienting regulation and corporatisation (Boyle, 2013:5). Consequently, the relegation of cultural and social values and the promotion of economic value above all others is considered to underpin the transformation of sports broadcasting rights and the marketisation of televised sport as a whole. The transformation of sport from a *public good* to its exploitation as a *private good* was noted. Whilst there are a number of interpretations about what constitutes the sports product, this research is specifically interested in the televised sport product. Consistent with a political economy approach, it is held that economic motives and power relationships largely determine which professional sports are supported, financed and eventually produced as a marketable commodity. In accord with Evens, Iosifidis and Smith (2013), the interaction between sports organisations and media firms is driven by major economic interests that dominate and shape market structures.

Considering the relationship between media economics, sports economics and sports broadcasting rights it was argued that more prominence should be given to the role of sports economics, as the construction and assignment of sports broadcasting rights resides with sports leagues and federations – any view without this perspective is incomplete. It should be noted that leagues and federations could, if they wished to do so, change their priorities when assigning rights. As leagues have attained market power they have attracted the attention of competition authorities in the UK

and Europe; intervention has influenced the auctioning of sports broadcasting rights and ended BSkyB's monopoly of Premier League rights.

This research will unpack the roles of three influential pre-production factors, including technology, broadcasting rights and regulation/competition. It is argued that this process begins with national broadcasting policy but, following deregulation (or re-regulation that allows previously closed markets, like broadcasting, to operate on free market principles and with only light touch governance) and the introduction of fierce commercial competition, an overtly consumer-oriented system more akin to that found in the US has been adopted in the UK. This helps to explain what sport we see on television, where we can see it and what the final output looks and sounds like.

The battle to control rights and subsequent television output is set against the increasing commercialisation of sport in the UK and the marketisation of broadcasting. As a result of unprecedented transformation many of the outcomes have yet to be researched including (a) the conditions that are increasingly added to broadcasting rights and (b) the expansion of federation activity into host broadcast operations and (c) provision of league-branded sports channels. The advent of digital technology has accelerated and intensified these activities.

Among a general scarcity of literature a comparison of the development of television sport in the US and UK between 1945 and 1995 represents a particularly surprising gap. This follows in chapter 3.

### 3 | History

A surprising omission in the political economy interpretation of television sports is a comparison of technological, economic and political developments in the United States and UK between 1945 and 1995. Although Barnett (1990) cautioned against such comparisons he conceded American commercial television “signposted the road ahead” (Barnett, 1990:153). With researchers considering a range of topics - from the incursion of marketing and promotional strategies (Giulianotti, 1999, 2005), how new types of corporate integration have been adopted (Whitson, 1998; Falcous, 2005) and the extension of transnational capitalism into sports (Nauright and Schimmel, 2005) - Boyle and Haynes (2000:66) claim this “reflects a mode of organisation that is more akin to the long-standing consumer-orientated configuration of sport in North America”. However, for long periods such changes were resisted in Britain, the subsequent speed at which overt commercialism and a more consumer-oriented approach was adopted is fascinating and a distinguishing feature between 1970 and 1995. In many ways the Premier League now demonstrates unprecedented levels of corporate behaviour and commodification that *surpasses* practice in US Major Leagues. Although there is some excellent work around the subject, no direct comparison of the development of sports television in the US and UK has been offered. This chapter addresses an omission as it extends the literature review and answers the first research question: how, despite some remarkable differences, many practices in the UK have gravitated towards those adopted in the US.

Post-World War II, the relationships between sport and television in the United States and UK could hardly have been further apart; the combination of professional sport and commercial entertainment-driven free-to-air network television in the United States contrasted starkly with the UK where there was an amateur ethos and paternalistic management of sport allied to a public service broadcast monopoly. Focussing on the NFL and English league football, the development of sports television through to 1970 is reviewed.

The next section tracks the technological, economic (particularly the rising value of sports broadcasting rights) and political development trajectories in the United States and UK as free-market principles and commercialism became prevalent between 1970 and 1995. In conclusion, it is argued that by the early 1990s it had become the similarities rather than the differences in the ways that sport and television function in the United States and the UK that stand out.

But something else was happening. Just how key attitudes attached to sport have radically changed in only 36 years can be seen in the transformation of the Olympics, from 1948 and the British Government-backed post-War London austerity games to 1984 and the aggressively commercial, privately financed, free-market funded model pioneered in Los Angeles. The impact of the 1984 Los Angeles Games sport-television-corporate model and the dramatic rise of global televised sports events are considered. The underlying theme is how market power has migrated from the broadcasters, moving upstream to the leagues and federations. This is important background context for subsequent discussion about how non-controversial

international television coverage is now provided directly by the federations – tracking this very significant development is essential to understanding just how much television sport has been transformed.

### **3.1 Sport and television in United States and UK 1945 to 1970**

#### **US Sport, open professionalism**

Pure amateurism simply never existed in the United States, argues Pope (1997). When baseball established itself in the 1870s as an entertainment business run by its owners, boards of directors and non-playing managers it was already openly professional. The very idea of sport as entertainment, or as a business, did not cause the sort of apoplexy it did in Britain. The four major US sports leagues are: Major League Baseball (MLB), the National Football League (NFL), the National Basketball Association (NBA) and the National Hockey League (NHL). Even though Major League Baseball (MLB) was a lucrative business for its owners it remained, from a legal point of view at least, defined as a game. MLB also had the good fortune to be formed prior to the 1880 Sherman Antitrust Act that banned monopolies, so it was exempt from potential legal action. In other words, sport in the United States was not regarded as trade in the traditional sense and leagues, like the MLB, were subsequently free to engage in cartel behaviour (Fort, 2006:261; Pope, 1997:65). This important idea had a profound impact on US sports' relationship with television; from the outset sport, entertainment and business were closely linked in the pursuit of profit.

## **US television, advertiser-funded commercial broadcasting**

In some countries broadcasting was considered too important to be left to commercial exploitation; the United States was not one of them. By using formidable political leverage large corporations seized control of the US broadcasting industry before a public service system could be established (Herman and McChesney, 1997:14). These corporations had recognised the commercial potential of radio as an advertising-funded medium; the post-World War II US television boom was funded by advertising. Advertising is central to the US free-to-air terrestrial broadcast networks because the economic forces favouring mass consumption of media is reinforced by the simultaneous production of audiences for sale to advertisers (Owen and Wildman, 1992:151; Picard, 1989). The viability of the free-to-air broadcast networks rests in their ability to remain the most convenient route for advertisers to reach mass audiences. The sheer scale of the US market is a key point of difference with the smaller UK market.

As discussed in chapter 2, there are consequences for relying on advertising to fund network television. Principally it is the value that advertisers place on the audience, rather than audience preferences that determines which programmes are provided. In this system the broadcaster has an incentive to maximise the supply of programmes that attract the audiences that advertisers will pay to reach<sup>14</sup>. As the US networks sought to correlate their advertising revenues with the ability to attract audiences, a preference

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<sup>14</sup> How broadcasters chose programmes explains copycat programming strategies that lead to increased uniformity of output. Owen and Wildman (1992) review a number of programme supply models (from Steiner and Beebe, to Spence-Owen and Wildman-Owen) that suggest likely outcomes for various forms of funding and for different levels of competition among broadcasters. For advertiser-funded television operating in a competitive market, they conclude that there is a bias in favour of programmes with large audiences and a bias against those that cater for minority interests.

developed for programmes that appeared at the same time each week. Programmes with familiar characters and storylines that were developed in only slightly varied situations and that carried over narratives from previous episodes were considered to generate viewer loyalty. According to Jay (2004:91) sports coverage fitted very neatly into this emerging pattern. As much as 30% of the prime-time schedule was devoted to sports coverage, making it a crucial part of early television programming in the United States.

### **US television and sport**

In just 8 years, between 1948 and 1956, the percentage of American homes that had television jumped from 3% to 81%, (Jay, 2004:61). The arrival of television had several important consequences for sports including:

- a) The relocation of existing teams. This was the *viable threat* of moving a team to more lucrative media-markets created by new demographic shifts. From the mid 1950s teams began to move, including the Boston Braves to Milwaukee in 1953, then to Atlanta in 1965; in 1957 the Brooklyn Dodgers and New York Giants moved to Los Angeles and San Francisco respectively.
- b) The rapid expansion of professional sports leagues and the creation of new teams.
- c) The development of new leagues that challenged the monopoly of the existing order. The American Football League (AFL) was established in 1960 to challenge the NFL, baseball's Continental League forced

the American League<sup>15</sup> to admit two new teams in 1961, and in basketball the American Basketball Association (ABA) was formed in 1967 to challenge the NBA.

The location of a team or composition of a league was heavily influenced early on by the revenue that teams received from selling their broadcasting rights. Advertisers were attracted to the audiences that televised sports drew and were willing to pay networks for access to these audiences. Initially this was in the form of sponsorship. Gillette often sponsored the entire cost of a sports programme, supplying the networks with sufficient funds to pay the professional sports leagues for broadcasting rights (Jay, 2004:102). In 1947 Gillette paid US\$175,000 to attach its name to television coverage of the baseball World Series on NBC. Also attracted to the narratives of the emerging televised-sports marketplace, beer manufacturers established associations between consumer products and sport. Single company sponsorship of televised sports events continued throughout much of the 1950s. The mutual relationship between professional sport, entertainment, business and television was the American way writ large.

### **UK Sport, paternalistic amateurism**

The historic hostility to commercialism among British sports ruling bodies is indisputable: “the rule of amateurs kept capitalism at bay in British sport” states Holt (1989:281). The roots of paternalistic amateurism lie in the Victorians’ organising genius for games. It was the British who invented

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<sup>15</sup> Although they operated together as the MLB, it wasn’t until 2000 that the National League and American Leagues were formally disbanded as legal entities with all their rights and interests vested in the MLB Commissioners Office.

many modern sports, codified their rules and exported them to the world<sup>16</sup>. Perelman (2012) links the origins of modern sport in England with the capitalist mode of production and the consolidation of imperialism. For the British, sportsmanship was the foundation stone. It was not so much *what* the British played, as the *way* that they played it that mattered most. Teams had very strong social and geographical links that went along way to defining their identity. Post-World War II the idea that sport might be an industry or a form of commercial entertainment would not have been acceptable to its managers who, themselves, were also amateurs. The FA in particular, as Conn (1997) points out, worked hard to protect football from “the corrosive idea that it [football] was purely entertainment, a business purely about money... The FA even had rules against directors making money out of clubs” (Conn, 1997:169). For most of the second half of the twentieth century British sport was poised between a rather idealised amateur past and a commercialised free-market future (Holt and Mason, 2000). In terms of a battle, this was to prove a mismatch.

### **The decline of amateurism in the UK**

Although amateurism remained popular in the 1950s it was soon in decline. Whilst Macmillan’s Britain was a very different place from Eisenhower’s America, the late 1950s and 1960s were still largely prosperous years that prompted Macmillan’s famous claim of 1957 that “Britons had never had it so good”. Football, boxing, golf, horse racing, cycling and cricket were also promising sports for budding professionals and, from the 1960s, amateurism began to lose its appeal. Contributory factors included the growth in international competition, changing expectations of what

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<sup>16</sup> For example, association football, rugby union and rugby league, cricket, tennis and golf.

constituted success, greater prosperity, and increased leisure options. The idea that sport was something to which financial value should *not* be attached began to seem rather out-dated. By the 1970s being an amateur came to mean little more than taking part. For Holt and Mason (2000), it was the market power of sports performers whose television appearances attracted the interest of advertisers and sponsors that triggered the demise of the amateur ethic.

Of all Britain's sports organisations it was football that claimed cultural centrality. The post-World War II repositioning of football signals the start of a general transformation in British sport. But sport on British television was valued very differently than in the United States.

### **BBC Television and sport**

The reasons why a public service monopoly was chosen to address basic market failure in the UK, including a rejection of market forces are discussed in chapter 2. As was the case with the US networks BBC Television placed a great emphasis on broadcasting sport, but for quite different reasons. Re-iterating Whannel (1992), Gratton and Solberg (2007) argue it made economic sense as, post-World War II, the BBC benefited from an enormous inequality in market power between the buyers (the monopoly broadcaster BBC) and the sellers of broadcasting rights (the amateur sports organisations). An annual calendar of broadcast events - one that resonated with the winter and summer seasons of sport - had already been created on BBC radio as early as the 1930s (Scannell and Cardiff, 1991) so delivering important sporting events to a national audience became a cornerstone of the BBC's PSB remit (Boyle and Haynes,

2000:69). As viewers joined the shared experience of BBC Television coverage, these events came to reinforce popular ideas about being British<sup>17</sup>. Arguing that it was promoting events to a national audience, the BBC resisted the payment of broadcasting rights fees to sport<sup>18</sup>. BBC Television's first major sports broadcast came from the 1948 London Olympics, but it wasn't until the 1950s that broadcasting attained any sort of momentum as previously modest sales of television sets were boosted in 1953 by coverage of the Coronation.

The BBC's monopoly ended when independent television (ITV) was approved as part of the Television Act of 1954. Around the same time the era of sports broadcasting rights formally arrived in the UK. Copyright issues had led to a restriction of television access to sport in the UK. Significantly, the Labour government's Committee on Copyrights (1952) announced that rights to television sports performances should be vested in the broadcaster on agreement of remuneration to sports promoters for any loss of revenue incurred. The BBC paid £1000 to broadcast the 1953 FA Cup Final with Stanley Matthews. However, sports governing bodies remained wary of the potential threat to attendances that television coverage might cause; such concerns kept coverage of live league football off British television screens until the early 1980s. In the UK, the staple diet of sport on television was edited highlights in a magazine format with live

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<sup>17</sup> The inclusion of events like the Oxford-Cambridge boat race said more about the tastes of BBC managers than the population at large.

<sup>18</sup> Lamenting the payment of a facility fee of £1000 for the 1930 FA Cup Final the BBC's head of OBs, Gerald Cock said: "It is a dismal prospect when the governing body of a sport originated, built up and entirely supported by amateurs, should be captured by professionals whose interest apparently is commercial." *Radio Times* 28 March 1930, cited in Boyle and Haynes (2000).

presentation links, like *Grandstand*. The BBC's Saturday afternoon sports magazine debuted in 1958 and ran until January 2007, almost forty years.

### **Value and the monopoly provision of sport**

Meanwhile, in the United States, sport was changing television. As the cost of single company sponsorship of sports events rose sharply in the 1960s the networks started selling advertising spots to multiple companies, essentially the style of commercial breaks we see today. Advertisers were able to buy access to network television audiences in a number of ways, with as much as 80% of time committed in the up-front market, where segments are sold centrally by the networks on behalf of their affiliate stations<sup>19</sup>. The ability to make an immediate impact by attracting massive audiences, for example by broadcasting the most popular sports, came to command a special value for broadcasters and advertisers. As values began to rise, sports governing bodies adopted cartel behaviour to monopolise the provision of their sport to media providers.

Ironically, it was amateur college sports that broke new ground. From 1949 college sport commanded significant fees for its broadcasting rights when CBS paid US\$100,000 for the rights to the annual Rose Bowl game from Pasadena, CA, (Jay, 2004:99). In 1952 the Television Plan allowed the National Collegiate Athletic Association (NCAA) to negotiate the broadcasting rights collectively for all Division 1A college football.

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<sup>19</sup> Owen and Wildman (1992) note 3 types of non-network television advertising: barter-syndication (where advertising time is bundled together with programming and sold as a package), the national spot market (where time is purchased in local markets and therefore bypasses the networks altogether) and, from the 1980s, advertising sold on cable channels.

Whilst the NCAA led the way, the turning point in the relationship between professional sports and media providers came in the mid-1950s when team owners decided to establish the NFL as a single economic cartel with a monopoly provision of the sport to the television networks. By 1967 the NFL and AFL champion teams - still playing in parallel leagues - faced each other in a showdown game designed specifically for television that quickly became American sports' most spectacular annual event – the *SuperBowl*. The cost of advertising slots within *SuperBowl* broadcasts and the transmission of bespoke advertising campaigns became a cult television event in itself and one that continues today. On the back of television exposure, by 1969 professional football (NFL) had taken over from baseball (MLB) as America's national game. The rising popularity of the NFL on television delivered important target demographics to advertisers. Media providers collected this value (the rates they charged advertisers for slot fees) and passed it through to the NFL in the form of sports broadcasting rights fees (Fort, 2006:84). The correlation between the advertising revenue a televised sport can attract and the value of its broadcasting rights was established and remains a viable measure of value in many markets today.

### **Sports broadcasting rights in the United States**

During the 1960s the market for sports broadcasting rights in the United States was changed by four factors described by McChesney (1989):

- 1) For the first time television was available in most American homes.
- 2) The technology of sports broadcasting was improving with slow motion and colour pictures increasing the quality of the viewing experience.

- 3) The Sports Broadcasting Act of 1961 allowed professional teams to negotiate together as a cartel with broadcasters and so substantially increased their market power.
- 4) Media providers recognised the potential attraction of sports broadcasting to advertisers; this audience demographic was attractive to advertisers and a premium for those slots could be charged.

As competition among broadcasters to capture the most popular sports broadcasting rights increased the result was scarcity. As the value of rights began to escalate market power migrated from broadcasters to the leagues. As noted, the NCAA was the first sports organisation to adopt cartel behaviour and from 1949, in a single decade, the price of broadcasting rights to NCAA college football increased almost 450% from US\$1.14 million, to US\$5.1 million as CBS and NBC, now joined by ABC, raised their bids in successive contracts.

The 1964 Tokyo Olympics is mentioned anecdotally as the turning point for a general upward spiral in sports broadcasting rights fees. However, there was an increase in competition for rights as the market adjusted from a duopoly to an oligopoly with the arrival of an ambitious and sports-oriented ABC. Whilst CBS acquired broadcasting rights to the 1960 Rome Olympics, it was ABC that won the rights for the 1964 Tokyo Olympics. The respective rights fees paid for subsequent summer Olympics were<sup>20</sup>:

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[www.facultygsb.stanford.edu/mcmillan/personal\\_page/documents/Bidding%20for%20Olympic%20Broadcast%20Rights.pdf](http://www.facultygsb.stanford.edu/mcmillan/personal_page/documents/Bidding%20for%20Olympic%20Broadcast%20Rights.pdf) accessed 17.08.2010

Figure 3.1, Summer Olympics, US broadcasting rights fees

| Date | Network | Rights fees US\$ |
|------|---------|------------------|
| 1960 | CBS     | \$394,000        |
| 1964 | ABC     | \$1.5 million    |
| 1968 | ABC     | \$4.5 million    |
| 1972 | ABC     | \$7.5 million    |
| 1976 | ABC     | \$25 million     |

Although the cost of broadcasting rights to the Olympics continued to rise, it can be argued that the burgeoning relationship between the NFL and television was more significant.

In 1958, a game between the Indianapolis Colts and the New York Giants is credited with transforming the NFL into a major consumer product. Seen live on television by an audience estimated to be anywhere between 30 and 45 million, the first sudden-death overtime championship game climaxed in a glorious finale for the Colts. For many fans, this game was the greatest ever played. Two years later, in 1960, the formation of the rival American Football League (AFL) demonstrated the growing importance of television to sports and *vice versa*. Whilst the AFL lost US\$3 million in its first year of operation, in 1964 NBC offered a US\$36 million contract for five years coverage, around US\$7.2 million per season and a substantial fee paid not for the *original* NFL but for a *rival* league. According to Jay (2004) NBC's bid came after CBS had offered the NFL US\$14 million for the rights to broadcast games for two years. Between 1961 and 1963 ratings for football on both networks had risen by 50%, apparently justifying such strong investment. On January 15 1967, the first *SuperBowl* game was played. According to Gratton and Solberg (2007:70) between 1967 and 2005 the

average cost of a *SuperBowl* advertisement soared by more than 6,000%, which is 12 times the rate of the average network prime time's inflation in advertising cost over the same period. During the 1960s NFL Commissioner, Pete Rozelle, realized the power of consolidation and the need for competitive balance between the league's teams. He created a new business model for American football, ultimately making the NFL far more financially valuable than other American professional league sports, even though it had far fewer games per season to offer to television. Whilst the NFL continued to set the benchmark for the remarkable revenues it collected from the sale of broadcasting rights it should be remembered that broadcasters were, essentially, making massive bets on their ability to make a profit by selling access to large audiences to advertisers by televising sport.

### **Sports broadcasting rights in the UK**

The impact of increased competition among broadcasters in the UK did *not* lead to a dramatic increase in the cost of acquiring broadcasting rights to sport as it had done in the United States. Instead the BBC and ITV came to act as an informal cartel in suppressing the fees they paid for sports broadcasting rights. This practice lasted through to the mid-1970s. However, in the mid-1950s, parliamentary debate centred on whether or not there should be a free market in sporting events at all, or if the activity of commercial television in acquiring sports broadcasting rights should be strictly regulated. In 1956 government intervention came in the form of a national list of protected sports events. The listed events were considered to be of major importance to society and, consequently, they should be made available to as many television viewers as possible on free-to-air television.

According to the DCMS<sup>21</sup> the original list was the result of a voluntary agreement between the BBC and ITA. The list consisted of the FA Cup Final, Wimbledon, England Test Matches, the Derby, the Grand National, the Boat Race and the Olympics and Commonwealth games when held in the UK. When BBC 2 launched in 1964, it gave the corporation the option to switch sports broadcasting between its channels therefore guaranteeing continued coverage in the case of an event over-running its planned duration; this became a useful negotiating tool. Neither the reallocation of ITV franchises in 1967, nor the arrival of Channel Four in 1982 had a significant impact on the prevailing BBC-ITV duopoly and the ability to acquire rights to the most popular sports at very favourable rates - by 1970 the BBC was only paying £120,000 per season for rights to show the football league on their popular *Match of The Day* highlights presentation. In contrast to developments in the US, market power remained very firmly with the BBC and ITV and did not migrate upstream to the sports organisations.

For Boyle and Haynes (2000:38) a history of sport in the twentieth century is often presented as a history of televising sport. They also identify sport and the media as two great forces of the twentieth century, forces that “have become entwined in a global business relationship, which brings both pain and pleasure to many and increasingly generates profit for a select few.” By the end of the 1960s many sports in the UK were facing a contested future, being pulled in one direction by increasingly out-dated amateur values and organisational structures and, in a new direction, by the influence of market forces and the lure of increased revenues via sponsorship and television exposure. British sport began for the first time to

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<sup>21</sup> [www.culture.gov.uk/freetoair/faq.html#17](http://www.culture.gov.uk/freetoair/faq.html#17), accessed 30.07.2009

embrace commercialism. Whilst the process was usually cautious and gradual (Holt, 1989:354), the pace was beginning to quicken. The 1970s saw a new relationship develop between sport, television and sponsorship.

### **3.2 Free-markets, commercialism, sport and television in USA and UK 1970 to 1995.**

Between 1970 and the mid-1990s the television business was transformed as restrictive regulations were lifted in the United States and UK. The technology of television production and of broadcast/distribution was revolutionised as a multitude of broadcasting platforms, some controlled by new owners, challenged the existing broadcasting order. With increased competition to acquire attractive content, the relationship between sport and television changed forever – the willingness to pay of advertisers, sponsors and viewers became an increasingly important factor. In the United States, the value of broadcasting rights to the most popular sports, like the NFL, began to rise dramatically in the 1970s followed by a further escalation in the 1980s. Although the value of broadcasting rights had been repressed in the UK these also began to rise quickly in the late 1980s, as competition to acquire live football rights gained momentum. By the 1990s it can be argued that the Premier League had created a more overtly commercial and corporate structure than its counterparts in the United States and was more profit-driven than any other professional sport before, including the NFL. These unprecedented changes and the economic consequences for sports broadcasting rights in the USA and UK are now reviewed.

## **The rise of the NFL**

Significant changes to the structure of US broadcasting from the 1970s are discussed in chapter 2. However, among the consequences the broadcast networks turned more of their attention towards producing in-house sports and news programmes, activities that were not restricted by regulation policy to the extent that entertainment series were. The rise in popularity of the NFL on US network television during the 1970s is, at least in part, a consequence of broadcasting deregulation and the *FinSyn* rules that restricted in-house production of network prime-time entertainment series and option terms for syndication rights (see chapter 2 and Owen and Wildman, 1992).

The 1970s was a golden decade for the NFL, its popularity grew steadily and advertisers and sponsors sought access to the large audiences live televised coverage of NFL games drew. The NFL was the first professional sports league to fully recognise and collect this value. Revenue from broadcasting rights soon overtook revenue from sponsorship (of events, teams and venues), ticket revenues and merchandising. For Fort (2006), it is the willingness of advertisers and sponsors to pay to access television audiences that altered the revenue side of professional sports forever. In a sense the NFL remains a voluntary organisation; it is an unincorporated association, which means that no single corporation is able to own any of the 32 franchises (teams)<sup>22</sup>. However, the teams, by acting collectively through the league and by adopting cartel behaviour, gained market power through monopoly control of media access to broadcasting rights.

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<sup>22</sup> In contrast the Premier League in England is a formal corporation where the 20 member clubs act as shareholders.

It was Rottenberg (1956) who identified that the maintenance of competitive balance was fundamental to the economics of team sports and it was the NFL Commissioner, Pete Rozelle, who put this concept into practice. Recognising the power of consolidation among teams operating in strong geographic markets (in territories that were protected from competition through the league), Rozelle was able to create a league-wide equilibrium that made *every* NFL game potentially exciting to watch (Jay, 2004). As explained by Fort (2006), an uncertainty of outcome must be preserved in games for fans to care and maintain their interest and that means there must be some overall balance of competition between teams. The NFL came up with a range of mechanisms to achieve consistent competitive balance and, consequently, was able to enhance the value of its broadcasting rights. Among the mechanisms are (a) salary cap agreements, (b) a reverse-order-of-finish draft system for players entering the league and, (c) an equal share of broadcasting revenues. With fewer teams and, therefore, less games played across a season to sell (a 14 week regular season followed by 3 rounds of play-offs), the major networks competed to acquire scarce broadcasting rights to the NFL and so the value increased substantially with each new contract. It was a seller's market. For 1970, Gratton and Solberg (2007) cite the NFL as earning US\$49 million a year from CBS (for NFC games) and NBC (for AFC games), both contracts were for four years. ABC contributed US\$8.5 million for the rights to broadcast the newly created schedule of Monday night games. By contrast, in 1970 the BBC paid £120,000 for the rights to show highlights from the Football League. Also of note: whilst NFL rights were split (or rationed) between the (then) 3 major networks the copyright to all NFL broadcast material resided with the league and *not* with the networks that produced the coverage.

### **Increased competition among US broadcasters**

The arrival of viable competition to the terrestrial free-to-air broadcasters increased the relative scarcity of broadcasting rights for the most popular sports driving up values, but what was different was the degree of inflation in the 1980s. Despite the increased competition from new media providers including pay-TV channels, a competitive edge was retained by the free-to-air networks because, as Jay (2004) reminds us, television sport is a medium for renting audiences to advertisers so the ability to deliver very large audiences combined with frequent breaks in play was a compelling proposition. This helps explain why, in contrast to the UK, Major League sports in the United States have retained a strong presence on the free-to-air terrestrial broadcast networks resisting the temptation to migrate wholesale to subscription-based television networks. Illustrating this point, News Corporation purchased the Fox Broadcasting Company in 1985 and developed it into the fourth free-to-air independent television system, building on the existing network to compete with the three major US networks. FOX Sports was set up in 1994 following the acquisition of broadcasting rights to the NFL (NFC games<sup>23</sup>) for four years with FOX paying US\$1.58 billion to strip CBS of the rights. Significantly FOX Sports, a sister corporation to BSkyB, was *not* set up as a stand-alone subscription-based service or even as a direct broadcast satellite television service in the mould of BSkyB even though, like BSkyB, it was transformed by the acquisition of exclusive live broadcasting rights.

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<sup>23</sup> The NFC has teams in most of the largest US markets, including New York, Washington, Philadelphia, Chicago and San Francisco.

It has been argued that US sport is less troubled when being described as a commodity, or as a business designed to generate profit. In another distinction from practices in the UK and Europe, the US Major Leagues were very much attuned to the needs of television from the outset, consequently the boundaries between what suited television coverage and what was enshrined in the rules of the game remained flexible and open to review. For example, the 2-minute time-out at the end of each half in NFL games is widely attributed to the need for a premium advertising break as the action mounted. Today, teams are allowed to challenge on-field refereeing decisions via a video replay seen by audiences at home and for which they are charged a time-out. In the case of the NBA, innovations originally provided to enhance television coverage have become signature parts of the game, including the 3-point shot and the 24-second shot clock that was introduced in 1954 to encourage faster play.

### **Leagues apart**

Between the 1970s and mid-1980s the contrast between English league football and the NFL could not have been greater, if anything they were even further apart than they had been in 1945. Whilst the protected list regulations and the BBC/ITV duopoly still dominated British broadcasting, the relationship between sport and television did begin a gradual process of intensification. In the early 1970s sponsorship, sport and television formed what Whannel (1992) called the sporting triangle signalling the first steps towards the corporate-media-sport alignment that was to follow. For Boyle and Haynes (2000:44) the 1970s and 1980s were a golden age for British sports television coverage whilst Holt and Mason (2000:120) concluded,

“Spectator sport and the media have fused together. The one is inconceivable without the other”.

However, unlike the US where leagues like the NFL exercised market power, sport in the UK desperately needed television exposure in order to attract sponsorship and boost revenues. In the UK the market for sports broadcasting rights continued to heavily favour the buyers, the broadcasters. In the early 1970s developments in cricket, golf, tennis and Formula 1 illustrated the tensions as sports were being pulled in one direction by out-dated amateur values and organisational structures and, in a new direction, by the increasing influence of market forces and the lure of increased revenues. Ironically, the lack of advertising on the BBC appealed to sponsors and led to a number of sponsored made-for-television cricket events such as John Player Sunday League. British sport began, for the first time, to tentatively embrace commercialism, although the process was usually cautious and gradual (Holt, 1989:354). Profound changes in sport can be linked to a shift in values among the organising elite of sport and the changing role of television, such changes are most apparent in English league football.

### **English league football rights undervalued**

For a long time the staple diet of English league football on television was edited highlights. Between 1968 and 1979 the value of broadcasting rights to football rose to £534,000 a season (Boyle and Haynes, 2004) as the BBC and ITV continued to keep fees depressed. In 1979, ITV tried to break the informal cartel by seeking an exclusive deal for Saturday night football highlights, but the Office of Fair Trading (OFT) intervened and the sought-

after slot was subsequently rotated annually between ITV and the BBC. By 1980 broadcasting rights had risen to £2.2 million (Boyle and Haynes, 2004:17), still only a fraction of NFL revenues. With the market still tightly constricted by the ITV-BBC duopoly there was a growing sense among the clubs that English football had undersold itself (Conn, 1997); maybe making more live League football matches available for broadcast would improve revenue streams?

In 1983 Canon became the Football League's first sponsor and the 1983-84 season saw live coverage of League matches return to British television on 2 October 1983 with ITV's *The Big Match Live*, the 2-year deal cost £5.2 million for ten matches per season. With the exception of a single match shown on ITV in 1960, remarkably, there had been no live coverage of English league matches prior to this contract, in this respect the UK lagged far behind the United States. The 1983 contract is also significant as broadcasters allowed commercial sponsorship for the first time; this took the form of logos displayed on club shirts. With potential revenue from sponsors, and an emerging replica kit market to service, other clubs quickly followed trendsetters Hibernian and Liverpool<sup>24</sup>. By contrast, the NFL has never allowed advertising on team shirts. From today's perspective it is hard to picture English football as unfashionable and out of favour, but it was not the only game in town as athletics provided an unexpected development in British sports broadcasting.

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<sup>24</sup> Derby County had a deal with SAAB in 1978, but the shirts were never worn.

## **Money matters**

In 1984, ITV acquired the rights to broadcast athletics events previously held by the BBC. ITV presented a 5-year, £10.5 million deal that was superbly timed as the popular rivalry between Sebastian Coe and Steve Ovett was about to reach its peak. ITV had prized away a key component of BBC Sport's portfolio of rights. The reason for the switch was not criticism of the coverage offered by the BBC, but was the sheer amount of money paid for the broadcasting rights by ITV. With the exception of those events identified on the government's list of protected events, from now on notice was served: whoever could pay the most to acquire broadcasting rights in the UK would win the bidding process.

Back at the Football League in 1985 an offer of £4 million a season for 19 live matches plus highlights was offered jointly by the BBC and ITV. Whilst revenue from television was creeping upwards the game itself was still beset with problems. 1985 provided further crisis points when, between 11 and 29 May, there were tragedies involving loss of life at football stadiums in Bradford City and Heysel<sup>25</sup>. When, some 6 months later, the Football League's broadcasting rights deal was finally completed it was for a reduced fee. Significantly, the new contract, which came into effect in 1986, was the first to breach the principle of equal distribution of revenues among all 92-league member clubs (Dobson and Goddard, 2007:81). From now on the rich would get richer.

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<sup>25</sup> 56 fans died in a fire in the main stand in Bradford, and 42 Juventus fans died after a wall collapsed during fighting with Liverpool supporters at the European Cup Final in Brussels.

### **Live televised league football in the UK**

In 1988, the cost of broadcasting rights escalated dramatically when ITV paid £44 million to cover a 4-year period from 1989 to 1992; £11 million to show 18 live matches per season. This is a landmark contract in the history of British televised football because, as Boyle and Haynes (2004:19) note, "it enshrined the notion of live football as an integral part of the regular televisual diet of football supporters". It was ITV, and not Sky Sports, that raised the number of cameras used for football coverage from around 6 to 17 per game. In only five years from 1983, the acquisition of broadcasting rights to live coverage of league football had become more sought after than highlights - this is an important shift. And, with challengers to the BBC/ITV duopoly waiting in the wings, the competition to acquire the broadcasting rights to live league football was about to become more intense and more costly than before.

### **British broadcasting, deregulation and satellite broadcasting**

Regulation played a significant part in determining economic practice in media markets and among media firms in the UK. However, competition to the BBC-ITV duopoly, at least as far as sport is concerned, did not come from cable networks but, instead, from direct satellite broadcasting. This was not the supplemental add-on broadcasting model found in the United States, it was all or nothing full-on competition for viewers. As Boyle and Haynes (2004) point out, it was not the arrival of ITV in 1955 that signalled the beginning of real commercial competition, but the arrival of BSkyB.

With competition between the BBC and ITV to acquire live football rights already intensifying and an offer of £9 million a season for ten years on the

table from BSB (prior to its merger with Sky), the top football clubs were encouraged to form a new super league. According to Conn (1997) club owners reasoned that such a league would increase bargaining power with the broadcasters by creating scarcity; clubs could collect enhanced television revenue and keep these fees for themselves without sharing with teams from the lower divisions. But disaster was to overtake English football once again when, in April 1989, 96 fans lost their lives at an FA Cup semi-final match at Hillsborough. The subsequent Taylor Report published in 1990, forced football to rethink its relationship with supporters including the provision of all-seat stadia for top-flight matches<sup>26</sup>. Boyle and Haynes (2000) argue that without the fundamental changes pushed through by the Taylor Report it is doubtful whether commercial television would have shown as much interest in football in the early 1990s as it did.

### **The FA Premier League**

Following the Taylor Report of 1990, Conn takes the view that:

If football had had a strong governing body, proud, sure of its game and its ethos, to undertake the fullest reassessment of policy called for by Lord Taylor, it would have felt a weighty duty and responsibility to reorganise the game for the good of all who loved it.

(Conn, 1997:153)

In the early 1990s, English football was most concerned with economic re-organisation. Even without television revenue unprecedented amounts of money were flooding into the game - Conn (1997) confirms that football was receiving public money in the form of a substantial tax break

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<sup>26</sup> In economic terms the reduction in capacity created scarcity forcing the price of tickets up.

amounting to £200 million over 4 years. For Conn (1997) the rush for profit, that had become the defining principle of British life in the early 1990s, was applied to football by the FA Premier League.

Following a battle for power between the Football League and the Football Association (FA), proposals to unify football from the Football League were rejected and the FA's document *The Blueprint for the Future of Football* (1991) carried the day. This 118-page document expressed the idea for a breakaway league to serve the richest clubs in England. As such, it set the tone for the takeover of football by businessmen and owners interested in making money from clubs whose assets they viewed as seriously undervalued and from which profit could be realised. For Falcoux (2005) the consequences were clear:

... these shifts were associated with reconfiguring power relations, the commercial realignment of playing structures, revamped administrative structures and revolutionised spectator provisions and event presentation. The historical legacies of paternalistic amateurism, limited entrepreneurial investment, which had previously constrained commercial activity, and decrepit infrastructures, were rapidly surpassed. (Falcoux, 2005:58)

The new league was set up as a corporation owned by the 22-member clubs<sup>27</sup>, each receiving a single vote. The new league also had commercial independence from the Football League and the FA, allowing it to negotiate its own broadcast rights and sponsorship agreements and to route those revenues to the top clubs without sharing with all 92 Football League

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<sup>27</sup> From 1995 this was reduced to 20 clubs.

members. For all the commercial developments driven through by the NFL in the United States, it has always retained the principle that clubs shared broadcasting revenue equally.

The FA Premier League was formed on 27 May 1992. Holt and Mason (2000) note the future of football was now in private-hands. Operating as a business, Premier League football now charged what the market could bear to pay for its product and the cost of match tickets rose. On the rehabilitation of football, Dobson and Goddard (2007:69) considered the game's re-emergence as "the most popular and fashionable national sport was aided by skilful exploitation by the industry of selective aspects of its own heritage". When considering the creation of the Premier League it should also be noted that this is an extremely rare example of a rival league replacing an incumbent league. The Premier League overturned the significant advantages held by the dominant league (the Football League); rivals to the NFL in the US have never been so successful.

### **Premier League broadcasting rights**

Recognising that new technology allowed broadcasting rights holders to collect value directly from the consumer - via an encrypted subscription service, lessening the overall reliance on advertising and exploiting the audiences willingness to pay - the BBC saw that it was, effectively, out of the competition to acquire live rights to the Premier League, so it acted strategically by collaborating with BSkyB<sup>28</sup> to offer a joint bid, with the BBC retaining the rights to show match highlights on *Match of The Day*.

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<sup>28</sup> The BBC had previously done a deal with BSB to acquire the rights to FA Cup and international matches, Dobson and Goddard, (2007).

Both ITV and BSkyB had lobbied the clubs and the new league intensely in order to secure exclusive live broadcasting rights<sup>29</sup>. ITV's sealed bid was for £262 million. Hearing of this bid from a Premier League official, BSkyB faxed over a revised bid of £304 million for 60 matches per season for five seasons. BSkyB's offer<sup>30</sup> included a top up for overseas rights and a fee for highlights rights provide by the BBC (Horsman, 1997: 91-105). This was an increase of £30 million on BSkyB's previous offer, whilst Conn (1997:20) places the BBC contribution as high as £44 million. The previous agreement between the Football League and ITV (1988-1992) was £11 million for 18 matches per season, whilst the combined BSkyB/BBC offer for exclusive rights to Premier League matches was an average of £60 million for 60 matches per season, a rise from just over £600,000 per match to around £1 million. Between 1983 and 1992, the average value of broadcasting rights per match to live League football in England had risen by close to 200%. Top-flight English league football had, some twenty years later than the NFL, come to exercise market power. The UK broadcasting rights market, at least for the Premier League, had become a sellers' market. Economically, live football was more important to the commercial future of BSkyB than it ever was for the BBC. Live Premier League football was scheduled across a range of new kick-off times and was aggressively promoted by *Sky Sports*. Premier League football was no longer available on free-to-air television in the UK, but was accessed via an annual subscription and additional PPV fees.

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<sup>29</sup> An account of the negotiations surrounding the first broadcasting rights issued by the Premier League are found in Fynn and Guest (1994) and Horsman (1998).

<sup>30</sup> Cave (2000) suggests that BSkyB's offer for their exclusive UK broadcasting rights is closer to UK£191 million in the initial contract.

However, the acquisition of sports broadcasting rights, partly due to the remarkable sums now involved, and partly because a number of large transnational corporations dominated the emerging global media markets, was not limited to knowledge of a single market. Gratton and Solberg (2007) suggest that, via News Corporation and FOX, BSkyB was acquainted with the strong competition involved in acquiring sports rights in the US market. This connection may have been influential when BSkyB successfully negotiated a further four-year extension with the Premier League costing £743 million, a 250% rise according to Dobson and Goddard (2007:82). However, it is just as likely to have informed FOX in its acquisition of NFL rights via BSkyB's experience with the Premier League.

The transformation of English league football did not happen in isolation and, among other influences, the rapid growth of global televised sports events, including the IOC Olympics and the FIFA World Cup Finals should be also considered. Of particular significance is the period 1982 to 1986, including the 1984 Los Angeles Olympics (that showcased the growing influence of global corporate interests in televised sport) and the increasing ambition of the organising federations to provide sympathetic television coverage on behalf of their commercial partners.

### **3.3 The rise of the global televised-sport event**

As sports broadcasting developed in the United States and UK, economically it was league sport that provided the bread and butter – regular games that were easily scheduled across several months and that delivered predictable audiences for broadcasters. But something new was happening. The shared

experience of watching sport on television was becoming an occasion in its own right, particularly with the Olympics and the World Cup Finals broadcast every four years. The IOC Olympic Games and FIFA World Cup Finals grew from modest events to new levels of global prominence primarily through television exposure allied to increasing levels of corporate interest. Four important case studies are now reviewed: the transformation of the IOC Olympic Games (3.3.1), the commercialisation of the FIFA World Cup Finals (3.3.2), the NBA and the global television market (3.3.3) and the UEFA Champions League (3.3.4).

### **3.3.1 The transformation of the Olympics**

The 1968 Mexico Games were the first to attract a significant television audience. For the first time television coverage was in colour and included live slow-motion replays. In the United States ABC packaged the games as a dramatic mini-series, a narrative full of human drama and emotion. In the UK, satellite relays enabled the BBC to broadcast breakfast-time Olympic programmes, a novelty at the time<sup>31</sup>. In 1972, television coverage of the Munich Games was split between sport and news after eight Palestinian gunmen took eleven Israeli athletes hostage. Despite the tragic death toll, the IOC declared: "the games must go on". In 1972, for the first time, the IOC appointed a private advertising agency and sold the rights to use the official Olympic emblem as a marketing tool.

However, the Olympic movement nearly collapsed as a consequence of the 1976 Montreal Games. Significantly, the International Olympic Committee

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<sup>31</sup> Ex-athlete, MP and Chairman of London 2012 LOCOG, Sebastian Coe attributes the start of his Olympic career to watching television coverage of the 1968 Mexico Olympics.

(IOC) does not pay to stage the Games. Instead, each Olympics is funded by the host city: a combination of the Local Organising Committee of the Olympic Games (LOCOG), and their National Olympic Committee (NOC). Although the event attracted 628 sponsors and suppliers it generated only US\$7 million for the Local Organising Committee. It took the city fully 30 years to pay off the debt incurred in staging the games, with interest included estimated to be US\$2 billion (Smit, 2006:184). Hosting an Olympics could be a liability.

The Olympics' reputation fell further with the widespread boycott of the 1980 Moscow games. NBC had agreed to pay US\$87 million for the US television rights before President Carter withdrew the US team in protest over Soviet military action in Afghanistan. The EBU obtained rights collectively on behalf of its PSB members so British broadcasters paid much lower rights fees. There was still British television interest in the discredited competition as the British boycott was much less effective than the American one. But the Olympic movement was struggling to find its way. In 1980 Juan Antonio Samaranch was appointed Chairman. Determined to find new sources of revenue, Samaranch proposed to repackage the Olympics to make them more attractive for broadcasters and sponsors. The IOC opted to handle all broadcasting rights negotiations itself, rather than via an agency like International Sport and Leisure (ISL).

According to the IOC<sup>32</sup>, broadcasting rights fees continue to account for 53% of Olympic revenue. The majority of this revenue has, since 1980, come from the US free-to-air networks. Revenue from broadcasting rights

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<sup>32</sup> [www.olympic.org/uk/organisation/facts/revenue/broadcast\\_uk](http://www.olympic.org/uk/organisation/facts/revenue/broadcast_uk) accessed 01/07/2009.

rose from US\$287 million in 1984 to US\$1.706 billion in 2006 – an increase of nearly 600% in 22 years. McCarthy (2014) reports that NBC secured a US\$7.5 billion deal to broadcast the Olympics between 2021 and 2032, having paid US\$4.4 billion for the period 2014 to 2020. The turning point for the IOC was the 1984 Los Angeles Games. If the 1980 Moscow Games were an advertisement for state socialism, then the 1984 LA Games were all about the benefits of private enterprise and the neoliberal values of the Regan-era. The impact of the 1984 Los Angeles Games on the organisation of sport in general should not be underestimated. The age of massive corporate sponsorship of sport had arrived<sup>33</sup>.

The US broadcasting rights for the LA Games tripled from US\$87 million paid by NBC in 1980, to US\$225 million paid by ABC in 1984. According to Jay (2004) this meant that ABC had to sell more commercials and devote even more airtime to the LA Games in order to recover the broadcasting rights fees and production costs. However, it wasn't the television coverage but the organisation of the Games that was to prove revolutionary.

The Los Angeles LOCOG separated sponsorship into three categories: (a) 34 companies that signed on as Official Sponsors, (b) 64 companies who purchased supplier rights, and (c) 65 companies that were licensees. Each category provided designated rights and exclusivity. The IOC official website confirms that the sponsors were mostly large, multinational corporations - Boyle and Haynes (2000:55) list Coca-Cola, McDonalds, Kodak, Levi-Strauss, Visa and Anheuser-Busch among the official sponsors who paid

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<sup>33</sup> Corporate sponsorship had been around on a smaller scale since the 1964 Tokyo Games when technical support from sponsors companies, like Seiko's creation of quartz-timing technology, began to take on a greater prominence.

between US\$4 million and US\$15 million each to be associated with the LA Games. More wryly, Jay (2004:181) observes someone even bought the rights to pick up the Olympic garbage. Under its organiser Peter Ueberroth, over half a billion US dollars was raised and, by making commercial sponsorships such a significant revenue stream, the first-ever privately financed games paid for themselves and turned a profit of US\$215 million. But this profit did not go to the IOC thus triggering further re-organisation within the Olympic Movement.

By the 1988 Seoul Games the IOC had established its own worldwide marketing programme. The designation worldwide comes from the business categories created for The Olympic Programme (TOP). These are limited to products and services that were considered to be marketable globally. For London 2012 there were 11 TOP worldwide partners<sup>34</sup>. Smit (2006) attributes the creation of TOP to the broadcasting rights holding and marketing firm ISL, rather than the IOC. The IOC reasoned the fewer corporations involved the more valuable individual sponsorships would be. Magdalinski *et al* (2005) note that the IOC benefits as consumers develop brand loyalty to the games, while its TOP partners rely on consumers developing brand loyalty *via* the games. They conclude: "Perhaps the Olympics *are* more capable of naturalising, even mystifying capitalist relations than are other forms of collective consumption" (Magdalinski *et al*, 2005:52).

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<sup>34</sup> <http://www.olympic.org/sponsors> accessed 15.10.2012

Even more so than twenty years of television coverage, what Ueberroth<sup>35</sup> had ultimately achieved with the 1984 Los Angeles games was to reshape the Olympics as a commodity presented to an unprecedented global audience via television. For Jay (2004:182) "from 1984 the Olympics became a packaged spectacle, an ideal medium through which corporations could sell their products." And, for Gruneau and Cantelon (1988:347), the change in organisation to a more hierarchical partnership signified the transformation of the Olympics into an increasingly market-orientated project where "a more fully developed expression of incorporation of sporting practice into the ever-expanding marketplace of international capitalism" is seen. For Boyle and Haynes the step change is significant:

For many the LA Games were a celebration of corporate capitalism, an arena where human activity was transformed into an economic process that fuelled the consumption of corporate goods and services. It was a process that television both mediated and played a central role in sustaining. Sport had become synonymous with corporate image, television entertainment and consumer capitalism and, for sponsors and marketers, global sporting events would never be the same again. (Boyle and Haynes, 2000:56.)

Whilst IOC revenues are now split between the fees they attract for broadcasting rights and a sophisticated marketing plan to promote key sponsors, it is the amalgamation of television and corporate marketing into a *single output* that defines the Olympics. This move was central to the Olympics' transformation over eight years, from a point of near collapse in 1976 to the spectacular growth seen from 1984 on.

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<sup>35</sup> Ueberroth went on to become MLB Commissioner between 1984 and 1989. His daughter, Heidi, became a senior executive at the NBA during its global expansion of the 1990s.

### **3.3.2 The commercialisation of the FIFA World Cup Finals**

The governing body for world football, FIFA, was radically transformed between 1974 and 1998. Previously known as an unadventurous organisation, FIFA became a more commercially aligned operation under João Havelange and, as with the Olympics, the 1980s saw significant changes.

From 1982, the FIFA World Cup began to expand. Between 1934 and 1978, 16 national teams took part in the World Cup Finals<sup>36</sup> before the competition was expanded to include 24 teams in 1982 and then 32 teams in 1998. The FIFA World Cup was first televised in 1954 and the primary sale of broadcasting rights was to the World TV consortium of public broadcasters with the European Broadcasting Union (EBU) leading the negotiations (Jennings, 2006). This arrangement remained unchallenged until 1996 when FIFA, advised by ISL, were convinced that the PSB monopoly led by the EBU was acquiring broadcasting rights for well under the potential market value - without demand created by competition, prices for broadcasting rights remained relatively deflated. Unlike the Olympics, there was virtually no demand from US broadcasters for the World Cup. On the other hand, the massive audiences attracted to the free-to-air terrestrial PSBs had tremendous appeal to potential corporate sponsors. Paradoxically, achieving the highest price for broadcasting rights did not necessarily deliver the most profitable outcome to FIFA.

FIFA's transformation was initially linked to the rapid expansion of the football marketing business, but it is the subsequent amalgamation of: (a)

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<sup>36</sup> With one exception, in 1938 when 15 teams took part.

the interests of large corporate sponsors with, (b) sympathetic event management and television coverage that (c) provides access to mass audiences that is significant. FIFA's own sales pitch says: "Together with the official broadcasters who deliver worldwide TV and radio coverage of the events, the sponsors and licensees are the pillars that support the staging and promotion of a FIFA event" (FIFA, 2009).

During the 1970s and 1980s the football marketing business was largely formed by two men: Patrick Nally and Horst Dassler, son of Adi Dassler the founder of the Adidas sporting goods firm. Nally advised sports organisers how to package their events in ways that would be appealing to broadcasters and sponsors then he would persuade companies like Coca-Cola to become sponsors of these events. Ahead of the 1982 World Cup, Nally set out a formal sponsorship practice titled *Intersoccer* that identified exactly what rights would be accorded to sponsors and how these rights would be protected on their behalf (Nally, 1979). *Intersoccer* was broadly similar to Ueberroth's three-tier structure for the 1984 LA Olympics; it became a very influential template.

Nally also cooperated with Dassler at the 1978 World Cup in Argentina selling advertising space, but Dassler became convinced it was the business of sports broadcasting rights that had the greatest potential (Smit, 2006). Up to this point, no third party company beyond a sports federation or broadcasters had held the broadcasting rights to a major sports event. Dassler jettisoned Nally and teamed up with the Japanese advertising giant Dentsu. In the autumn of 1982, a marketing and broadcasting rights

holding company called International Sport and Leisure (ISL<sup>37</sup>) was set up in Lucerne, Switzerland. The new firm quickly corralled the football marketing business.

Dassler<sup>38</sup> continued to advise Havelange and, from 1982, FIFA greatly expanded its commercial ventures including advertising and merchandising. ISL paid 45 million Swiss francs for the 1986 World Cup in Mexico and they raised over 200 million Swiss francs from assorted sponsors, profit that went directly to FIFA, unlike the relationship between the 1984 LOCOG in LA and the IOC (Smit, 2006:196). In 1988, the award of the 1994 World Cup to the United States appeared to underline FIFA's interest in profit and engaging corporate interests.

According to Smit, for several years ISL were issued huge broadcasting rights contracts for both the Olympics and the World Cup Finals without a second thought given to the process (Smit, 2006:196). For the first time, broadcasting rights from sports governing bodies were held by a third party for subsequent sale to broadcasters without the need for ISL to make any programmes – it can be argued that the creation of value, as a separate process from production, reflected the general swing away from the production of goods to the provision of services that was taking place in the wider economy. The ISL operation was a trailblazer for other rights holding companies to follow, including IMG, Kirch Media and SportFive.

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<sup>37</sup> ISL was jointly owned by Dassler and Dentsu. Smit (2006:210) claims Dassler persuaded Dentsu to give him a 51% share in ISL that he placed in a holding company called Sporis.

<sup>38</sup> Anecdotally, it is said that Dassler taught Havelange to sell the World Cup and Samaranch how to market the Olympic Games.

As was the case with the Olympics, the World Cup Finals were redefined in ways that mostly benefited FIFA. This included placing the marketing strategies of large transnational corporations at the very heart of tournament staging and television presentation. In a set up reminiscent of The Olympic Programme (TOP) - believed by Smit (2006) to have been conceived by ISL - signing a group of primary sponsors was designed to (a) spread the financial risk of the World Cup Finals and (b) result in less dependence on revenue from the sale of broadcasting rights alone. However, the two activities remain intricately linked. The conversion of the governing institution of football into a corporate organisation that, for example, now hedges against variations in currency exchange valuations, or that requests tax-free status and fast-track work permits when operating in a host country (Jennings, 2006<sup>39</sup>) is part of the overall transformation. The ISL-FIFA joint marketing strategy provided a commercial base from which international football - now being sold as a highly commercialised entertainment industry and marketed as "the World's game" - could extend its relationship with the transnational corporate world. In other words, the four-year period between 1982 and 1986 saw a new corporate-sport-media axis emerge that enabled the dramatic rise of global televised sport events from the mid-1980s well into the 21<sup>st</sup> Century. As the rest of the sports world assimilated these new business models, the next step was their adoption by national and regional sports federations.

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<sup>39</sup> Jennings reiterated his argument in a high profile Panorama documentary titled "Fifa's Dirty Secrets" and broadcast on BBC One at 20.30 on 29.11.2010 ([www.bbc.co.uk/programmes/b00wfl8t](http://www.bbc.co.uk/programmes/b00wfl8t), accessed 12.10.2012).

### 3.3.3 The NBA, sports marketing and globalisation

The NBA was the first league to align their television product with growing global marketing trends. Entertainment values and an overt association between celebrity and sports superstars were key ingredients in the NBA brand.

In the early 1980s, the NBA came very close to collapse (Jay, 2004:202). The increase in competition, particularly from new media providers, to acquire sports broadcasting rights was critical to the NBA's development and came at a very opportune time. In 1984, David Stern was appointed NBA Commissioner. Four months later Michael Jordan was drafted into the NBA by the Chicago Bulls. Jordan's rise to global superstardom is attributed to David Falk<sup>40</sup> and the ProServ agency. ProServ set up Jordan Universal Marketing and Promotions (JUMP) wrapping Jordan's commercial activities into a corporation. Jordan's popularity was enhanced through his endorsement of Nike sports products. Falk persuaded Nike to create a signature shoe for Jordan called "Air Jordan" (Jay, 2004). From 1985, Air Jordan shoes were advertised widely on television. The commercials shot by movie director Spike Lee, who appeared in the commercials reiterating his successful Mars Blackmon character<sup>41</sup>, achieved a cult status and were instrumental in propelling the increasingly commercial culture of modern sport into the mainstream. Jordan's example illustrates how athletic ability was no longer enough to define top sports stars; "they also needed to promote themselves, to turn their skills into something that sells" (Jay,

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<sup>40</sup> Falk, like Stern, is a practising lawyer.

<sup>41</sup> Lee played Blackmon in his 1986 film *She's Gotta Have it*.

2004:241). By 1992 only US\$4 million of the US\$25 million Jordan earned annually came from the Chicago Bulls<sup>42</sup>.

Off the back of Jordan's success the NBA adopted an aggressive global marketing strategy. Nike founder Phil Knight suspected that the NBA was free-riding on the advertising campaigns of Nike as the league set about constructing its own personality-based sports brand. In selling NBA broadcasting rights abroad, the NBA had an advantage over the NFL insofar as basketball was played more widely elsewhere than American football. *NBA Entertainment* also produced a number of in-house basketball magazine and lifestyle programmes. *NBA Inside Stuff* was one of several well produced programmes that were offered as a bundle to international broadcasters, often for free, when they bought the rights to live coverage of regular NBA games<sup>43</sup>. These entertainment programmes added value to the rights packages offered. "That's the beauty of television," explained Stern (Jay, 2004:229). "Other brands have to buy their way on through advertising. Our core product is a two-hour commercial that someone pays us to run." For Stern, then, NBA games were used to drive the NBA's global commercial activities. As part of the marketing process dozens of A-list Hollywood stars plugged the league by repeating the NBA's marketing mantra "I love this game" to camera whilst watching the action from expensive courtside seats. Stars like Bill Murray (Chicago), Jack Nicholson (LA Lakers) and Spike Lee (NY Knicks) were frequently picked out during

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<sup>42</sup> Jordan's corporate clients included McDonalds, Coca-Cola, Wheaties, plus Haynes and Gatorade.

<sup>43</sup> Although the programmes were often "free" this was subject to a guarantee that they would be shown on air in a reasonably prominent slot. Programmes such as *Inside Stuff* and *NBA Jam* had substantial budgets and were presented by frontline talent such as Ahmad Rashad. The launch of NBA programming in any given territory is often accompanied by a marketing campaign for NBA merchandise and sometime exhibition games featuring two NBA teams.

live coverage as ideas about sports, entertainment, celebrity, superstardom and commercialism began to merge<sup>44</sup>.

The epitome of the personality-basketball-sporting goods marketing formula came in 1992 with the appearance of the NBA Dream Team at the Barcelona Olympics. Twelve of the highest paid professional basketball players were selected as national pride and commercial goals became fused together. The Dream Team won gold spurring the NBA's global commercial activities on to a peak in the mid-1990s. The NBA, a US domestic league, established a global market for sports broadcasting rights in addition to quadrennial events like the Olympics and World Cup. Executives of the newly formed Premier League were attentive to the NBA's commercial activities. Rick Parry, the Premier League's chief executive, accompanied representatives from Chrysalis Sport (where I was producer of NBA coverage for Channel Four) to review NBA operations in Secaucus, NJ.

### **3.3.4 UEFA Champions League, embedded sponsorship and output control**

UEFA is one of the six regional federations within FIFA, it runs a number of high-profile football competitions at national and at club level. In 1955, the newly formed UEFA came up with a bold formula for football that combined, (a) mid-week football matches held under new floodlighting systems, (b) improving airline services to transport clubs to matches across Europe and (c) emerging pan-European television coverage.

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<sup>44</sup> An interesting footnote concerns Channel 4's coverage of the NBA in the UK in the mid-1990s. In a 3-year deal the NBA ceded copyright of the finished programmes to Channel 4. However, the NBA failed to understand that they could not exercise editorial control over the programmes, despite many efforts to do so. In future deals NBA retained the copyright.

By the early 1990s under pressure from Europe's leading clubs – that were threatening their own breakaway European super league - UEFA introduced a league system that guaranteed all qualifying clubs a minimum number of games, with these games came additional revenue. A dedicated company - The Event Agency and Marketing AG (TEAM Marketing) - was formed in 1991 to secure "the greatest monetary gain through marketing of television rights and sponsorship opportunities of the UEFA Champion's League" (Sugden and Tomlinson, 1998:93-97). The approach adopted by UEFA and TEAM Marketing owed much to the models created for the 1984 Los Angeles Olympics, Nally's influential *InterSoccer* template and by the activities of FIFA and ISL. The new Champions League format was launched in the 1992-93 season. By 1998, TEAM Marketing was estimated to receive £30 million from the competition per year, from an estimated income of £185 million to UEFA with the participating clubs sharing £100 million (Banks, 2002:128).

What distinguishes the UEFA Champions League is that television coverage comes with an onscreen presence for UEFA's corporate sponsors (8 in 2013-14) already attached. Guaranteed exposure for UEFA's commercial partners is embedded within a highly prescribed television production and event-wide presentation methodology. Acquiring the broadcasting rights to the Champions League means that broadcasters must follow the procedures and practices set out in the UEFA Champions League Production Manual. The manual has grown to nearly 150 pages (2013-2014 season); it is written by TEAM Marketing and describes all aspects of Matchday (-1) and Matchday television coverage and distribution in detail. It also includes timed multi-lateral running orders that all broadcasters must follow pre-

match, in and out of each half, at half-time and at fulltime. TEAM Marketing executives are present at every match to advise the host broadcaster on production, they also monitor the television coverage for every Champions League match. The UEFA Champions League host broadcast operation represents an unprecedented level of control exerted by a governing body over the broadcast output on behalf of its corporate sponsors.

“Developments in the commercial and media world have gone hand in hand with football’s evolution in recent years. Consequently, UEFA’s marketing, commercial and technological activities have intensified considerably” (UEFA, 2009)<sup>45</sup>. Alex Fynn, one of the original architects of the Premier League (Boyle and Haynes, 2004:64), confirms UEFA “Now recognise through control of sponsorship, advertising and TV rights, that they have the power”. Such market power goes a very long way to define what sports we can see, where we can see them and what the final programmes look and sound like.

## **Conclusion**

Chapter 3 argued that sport and television in the UK have become realigned along commercial and consumer-oriented structures more typically seen in the US. This is despite starting from virtually opposite positions post-World War II. The Premier League now demonstrates unprecedented levels of corporate organisation and profit-driven motivation, surpassing some of the activities of the NFL, a League that, for so long, set the benchmark for commercial activity.

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<sup>45</sup> [www.uefa.com/uefa/keytopics/kind=131072/index.html](http://www.uefa.com/uefa/keytopics/kind=131072/index.html), accessed 07/07/2009

The comparison between the development of sport and television in the USA and UK addresses a surprising gap in the literature and underlines the scale and the speed with which sport and television in the UK has changed. It also embraces the "peculiar economics of sport" (Neale, 1964) a critical dimension frequently overlooked in media studies and political economy interpretations.

From 1945 until 1970 British sport was pulled between an idealised amateur past and a commercialised free-market future - a legacy is found in the British government's list of protected sports events. However, from 1970 the development of sport in the UK was increasingly influenced by the combined needs of television, sponsorship and advertising. In the late 1980s significant technological and regulatory change subjected sport and broadcasting in the UK to free market principles.

It was argued that the behaviour of the NFL in the US was very significant. The 1964 Tokyo Olympics are commonly held to have triggered an escalation in rights fees, but a more convincing argument arises from the consequences of competition between the 3 major US networks to acquire NFL broadcasting rights. The NFL was the first professional sports league to understand the importance of (a) the collective sale of sports broadcasting rights (cartel behaviour), (b) providing league-wide sporting equilibrium (competitive balance and uncertainty of outcome) and (c) exercising its market power to collect this value. This took the form of rationing the broadcasting rights which created scarcity; as there was no effective substitute for the NFL it became a seller's market and the price of NFL rights rose steadily from the 1970s. Economists including Fort (2006) have

identified the willingness to pay of sponsors and advertisers to access audiences as highly significant in (a) determining what content is broadcast and (b) in changing the revenue side of sports forever.

It was also argued that the NBA, in the 1980s, overtly allied its sport product to entertainment values and celebrity endorsements that, together, helped to propel the commercial culture of modern sport into the mainstream.

The 1980s also saw the formalisation of large-scale corporate sponsorship as a viable alternative to advertising. This had a profound impact on the growth of global televised sports events including the Olympics and the World Cup Finals. From a point of near collapse, the IOC set out to make the Olympic Games more appealing to broadcasters and large corporate sponsors. The amalgamation of sport, television and corporate interests into a *single package* was commercially successful and, from the landmark 1984 Los Angeles Games, the IOC moved forward on a more aggressively commercial basis. Similarly, FIFA greatly increased its revenues from advertising, sponsorship and broadcasting rights from the early 1980s, with the biggest gains coming from 1986 onwards. International Sport and Leisure (ISL) was an influential company in developing lucrative methods of sports marketing for the IOC and FIFA. The company also pioneered the third party acquisition of sports broadcasting rights and how to sell these rights on to media providers. In 1992, the UEFA Champions League was launched adopting many of the lessons learned by the IOC and FIFA. UEFA required participating broadcasters to follow their highly prescribed

Production Manual and to ensure that the embedded sponsorship from UEFA's key commercial partners was correctly woven into the coverage.

Meanwhile in the UK, the BBC/ITV broadcasting duopoly operating in tandem with the government's list of protected events had stifled the value of sports rights, with live football remaining undervalued until the late 1980s. However, as was the case in the US over a decade earlier, a combination of technological development and deregulation rapidly changed the broadcasting landscape. In the UK this meant the 1990 Broadcasting Act and the arrival of direct satellite broadcasting. BSkyB did not see itself as supplemental to the existing broadcaster order but sought to overturn the established players and dominate the market – an era of fierce commercial competition had begun. In 1992 the creation of the Premier League signalled the most rational approach to capital accumulation yet by a British sport. With its corporate structure and commercial autonomy the Premier League is driven by an unambiguous profit motive. In some important ways it can be argued that the Premier League has become even more commercial and profit-driven than the NFL, both in terms of its structure where members act as shareholders and the global sales revenues for broadcasting rights it has achieved.

The undertow to chapter 3 is how economic, political and technological forces combined in various ways from the early 1970s to create a world where what is good for business is considered to be good for us all.

"Neoliberalism..." claimed Harvey (2005:166), "...has unquestionably rolled back the bounds of commodification and greatly extended the reach of legal contracts". Among the consequences was the "financialisation of

everything" (2005:33). By the early 1990s, sport had come to matter a great deal to big business and managers of increasingly commercial and global media industries. "Sports now stress the need to be business like and efficient, offer sites for the celebration of corporate capitalism... and, in general have become prime sites for the construction and reproduction of an entrepreneurial culture", concludes Whannel (1992:208). For professional sport this meant realignment with the interests of corporate investment and the managerial tenets of advertising, marketing and public relations (Falcous, 2005).

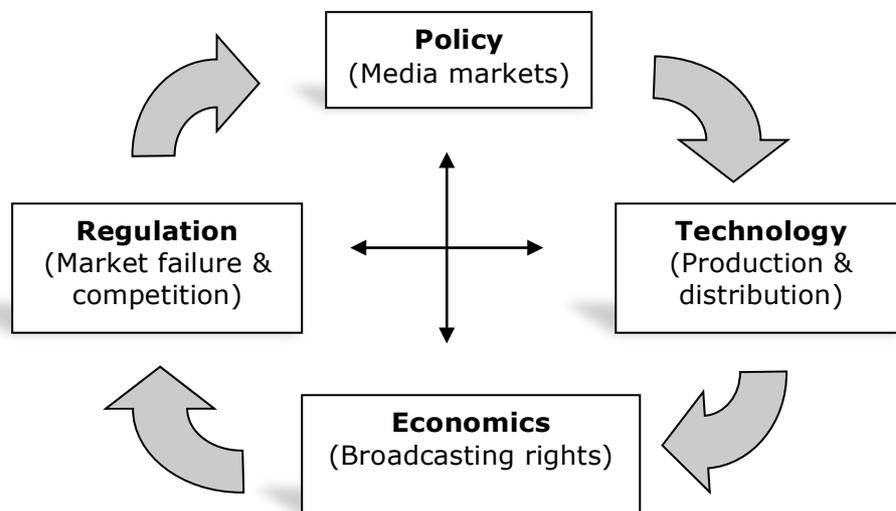
The US market structure has meant that the Major League sports have retained a strong presence on the free-to-air broadcast networks. The model of increased exposure and higher audience ratings via free-to-air television has served the interests of teams, leagues, broadcasters, advertisers, sponsors and viewers alike. It is ironic that free-to-air broadcasting provided the foundations on which the highly commercialised modern sports industry is built to the extent, today, that media regulation, in the form of listed events protection, and competition law is all that has prevented wholesale migration to pay-TV in the UK.

This chapter filled a surprising gap in the literature. It also addressed the first research question – how television sport in the UK came to adopt a more overtly consumer-oriented approach more consistent with that found in the US. The chapter provided further context prior to the detailed discussion of technology, broadcasting rights and regulation that follows in part two.

## Part two | Pre-production processes in television sport

In part one it was argued that the transformation of television sports production in the past two decades has been driven by a combination of forces including broadcasting policy (media markets), technology, economics (broadcasting rights) and media regulation. In practice, developments in technology (encompassing transmission, production and distribution technology) are often re-articulated via the range of broadcasting rights subsequently issued in the next cycle. The competition to acquire broadcasting rights is mitigated (usually a further cycle behind) by industry regulators; these regulators and competition authorities echo the prevailing national or regional media policy.

Figure 2.1, Policy, technology, economics and regulation



It was also argued that although political economy was good at explaining the big picture, the literature was less effective when describing the middle ground of organisational structures and workplace practices (Cottle, 2003:4), in other words the trickle-down effect of transformations on

broadcasters and sports producers and directors. As there is a general scarcity of literature about television sports production, the research is aimed at this space. More specifically, there is no convincing account of activities on the supply side of contemporary content provision and this appears to be a significant gap.

The aim of part two is answer the second research question: how do largely unseen upstream pre-production processes – technology, economics (specifically sports broadcasting rights, but also the economics of sports organisations and media providers) and politics (as applied via competition law and media regulation) - increasingly influence what television sport looks and sounds like, where it can be seen and who can see it? A key objective is to demonstrate the sheer scale of transformation that has taken place since the early 1990s, including how a significant increase in demand has been supplied by a combination of digital technology and new production workflows.

Part two also reveals the *addition* of prescriptive conditions to broadcasting rights agreements. These prescriptions are indicative of the wider interests of sports leagues and federations as they become involved in host broadcast operations providing approved coverage and even running their own dedicated content channels. Cottle (2003:20) describes macro-level influences that condition the operation and output of media organisations at global to local levels. However, in a main point of divergence from Cottle, technology, broadcasting rights and regulation are *not* forces that are negotiated at the point of production, or even within the general production domain, but have come to exert a very significant influence much further

upstream and long before the traditional production processes carried out by broadcasters or producers.

Todreas (1999) explains changes to the television supply chain by referring to the conduit and the content, arguing that value migrates upstream meaning profitability switches from the owners of the conduit to the owners of the content. In a new contribution, part two demonstrates that a very significant degree of control over the final output now rests with the leagues and federations.

When it comes to evaluating the influence of technology on sports television, this would make a PhD in itself. Throughout the history of television sport, technology has played a pivotal role; with the exception of news production, no other television genre is so closely associated with technological developments and logistical aspects of coverage than sport. As noted in chapter 2, Evens, Iosifidis and Smith (2013) identify 3 phases in the history of television in the UK: (1) public service regulated monopoly/duopoly (under conditions of spectrum scarcity), (2) from the 1980s to the mid 1990s the emergence of new delivery systems, the end of public service duopoly and the introduction of commercial competition and, (3) the current phase, the transition from analogue to digital. As technological developments apply widely and embrace (a) transmission, including new viewing options, (b) production, (c) distribution, and (d) archive, the argument here is not in favour of technological determinism but for viewing transformation as part of a wider process of marketisation and how the market has become the central frame of reference for cultural activity (Boyle and Haynes, 2004:52).

Chapter 4 considers technological transformations. Todreas (1999) identifies three phases since 1992 including: (1) the limits of linear analogue technology, (2) the transition from tape-based media to digital media and (3) high definition and beyond. This research expands understanding with: (a) a brief overview of transmission technology as an important forerunner in the switch to digital, (b) by examining the limits of analogue technology in sports production, (c) identifying pivotal developments in digital technology, (d) comparing analogue and digital workflows to illustrate the sheer scale of transformation and (e) reviewing the extraordinary increase in volume and scope of content that can be produced rapidly in a digital workplace. A political economy perspective is added by asking *who* does *what* and *why*, with the Premier League providing a new case study.

Transformations in both transmission and production technology are linked to developments in broadcasting rights. Rights tend to follow one cycle behind technological developments and include important new ways of distributing content plus the emergence of lucrative overseas markets. Consequently, chapter 5 tackles sports broadcasting rights by considering: (a) what is copyright and intellectual property and how this is connected to the market (b) the changing values and definitions of sports broadcasting rights and (c) the implications of rights for producers, with a new case study from the UEFA Champions League.

Chapter 6 then focuses on the role of regulation from (a) national and international level broadcasting policies such as the list of protected events, (b) examples of intervention directed at the Premier League and the UEFA

Champions League, (c) the regulation of both markets *and* content in the UK and (d) the widening gap between regulatory intention and actual output as seen in regional production quotas and the application of the Transfer of Undertakings Regulations (TUPE).

Part two is quite wide-ranging. The research draws on primary evidence, including extensive field notes taken as a participant–observer working in sports television. Contributor testimony is added via both short and longer form semi-formal interviews. Secondary evidence is added from access to production manuals issued by the federations, press reports and specialist business reports. Consequently, the ways that broadcasters and producers engage with technology, broadcasting rights and regulation is framed from several angles.

The overall orientation of part two is towards the supply side (production), rather than the demand side interpretation favoured in political economy critiques. It is hoped this new perspective will complement existing studies by filling a gap in the literature.

## 4 | Technology

Examining broadcasting we can see: (a) the platforms, technology and workflows used for transmission and (b) the services that are presented on these platforms: the schedules and content. Increased demand for sports content comes from broadcasters and pay-TV providers, who are not broadcasters in the traditional sense. Looking at production technology, whilst this may initially be considered a third category of activity, recent convergence - particularly the widespread adoption of digital media servers - means the boundaries between transmission, production and distribution have narrowed substantially.

This chapter considers the transformation from analogue to digital and, crucially, how digital technology became the basis for new workflows in sports television, including how accelerated workflows deliver dramatic increases in the volume and scope of content.

As most political economy discussion tends to focus on the demand side - on the creation and ownership of content and channels - this chapter adds an important account from supply side; of how radical developments in sports production technology including new workflows were essential in meeting a rapidly escalating demand for sports content. Meeting this demand would not have been possible working in the analogue paradigm. The research avoids charges of technological determinism by looking at *who* is using new technology, *how* it is used and for what purposes, *why*. The extent to which football, and the Premier League in particular, has entered

a new phase of intense commodification is remarkable, this is revealed in a new case study. As Doyle (2002) notes, the continuous expansion in the ways in which television can be distributed to viewers is significant. The ways very large volumes of content is (a) received by broadcasters, (b) organised into recognisable schedules and (c) disseminated in a structured way is now reviewed.

#### **4.1 Transmission technology**

It was the creation of viable alternatives to previously limited and strictly controlled analogue frequencies that radically changed television broadcasting in the UK. The volume of available sports content, plus the numerous ways this content can be consumed has been transformed in 20 years, with a great deal of momentum added in the past decade. Such processes, argues Schimmel (2005:3), accelerate “the commodification and commercialisation of sport and deliver sport product on ever increasing scales to international consumers”. A vanguard of technological change was transmission.

##### **1992, analogue, tape-based transmission systems**

By the early 1990s terrestrial broadcasters had developed well-understood transmission processes that did not vary much. This was an analogue, tape-based operation where workflows were determined by the hardware that was used to organise and transmit content. Broadcasters acquired content on videotape. Tapes were barcoded, given a quality control check and copied for transmission. Presentation schedules contained interstitials, channel-branding, content promotion, information and programme links.

Commercial broadcasters incorporated advertisements into their schedules. With robotic machines (Odetics) or flexicarts physically moving media into place it was a straightforward mechanical operation.

In transmission, physical tapes and play-out machines were visible assets and content could be seen as it progressed through linear workflow towards a live broadcast output controlled via a dedicated transmission area and supervised by a presentation director or transmission controller<sup>46</sup>. However, computer software and new digital, server-based technology would soon trigger the re-organisation and eventual automation of transmission systems.

### **Beyond traditional terrestrial TV**

From 1993, the established terrestrial broadcasting order in the UK faced a number of challenges with new channels launching and innovative ways of consuming content becoming available. On 1 September 1993, the BSkyB multi-channel satellite service was launched. BSkyB introduced monthly subscriptions and the electronic turnstile or pay-per-view broadcasting<sup>47</sup>. An analogue service, it ran until September 2001 when it was superseded by the Sky Digital platform.

All broadcasting systems are essentially downlink transmissions. Linear broadcasters offer programmes in a fixed schedule, a timed sequence used

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<sup>46</sup> Each BBC broadcast channel had a dedicated transmission gallery with an on-air presentation director, production assistant and technical staff ensuring that all content was played in and all live voiced links, or live programmes ran to time, so content flowed as if run by a well-oiled machine. The prospect of live sports upsetting these schedules was seldom well received.

<sup>47</sup> In 1996, 660,000 customers paid to see the boxing match between Frank Bruno and Mike Tyson.

to order content. But ideas about viewing content were starting to change, options surrounding choice of content and about when this content could be viewed, were becoming available. Notable steps include:

- The arrival of Amazon (1994), DVD (1995) and the TiVo personal hard disk recorder (1997).
- In October 1998 BSkyB launched an all-digital satellite service, including an interactive red-button service now known as Sky Active.
- In 2001 the Sky+ box was launched.
- With the new millennium came Google, the iPod and Xbox. 2002 saw the launch of RIM's Blackberry popular email-linking service. Internet 2.0 helped establish iTunes (April 2003), Facebook, Flickr and Gmail all of which followed in 2004.
- In 2005, Sky News and Sky Sports were streamed to mobile phones. The first YouTube video was uploaded in April 2005. Videos and TV shows were available to download at the iTunes store.
- In 2006, Sky+ HD became the UK's first nationwide high-definition service. The online social networking and micro blogging service, Twitter, was launched.
- 2008 saw the BBC and ITV offer a joint-venture service on Freesat, a UK oriented free-to-air digital satellite service.
- By 2010, BSkyB offered a 3-D service.
- Turning to mobile platforms, a significant incentive to advertisers using Internet and mobile services was the ability to collect more detailed data, including customer usage and preferences. The iPhone was launched in 2007. In 2010 Apple launched the iPad, this type of device is attributed with establishing a notable change in viewing

habits as more media, including television content, could now be accessed remotely (wirelessly).

A range of video on demand (VOD) services had also been introduced. The BBC iPlayer had been around since 2005, going live on 25 December 2007, and Sky Anytime+ was launched in 2010. By 2011, the BBC iPlayer included links to programmes from other broadcasters –the ITV Player, 4oD and Demand 5. Specific iPlayer applications for mobile platforms were launched in February 2011. Sky Go, also launched in 2011, enabled its customers to watch live television on the move via laptops, smartphones and tablets as part of their monthly subscription.

During this period the value of live sport, particularly football continued to rise – for media providers there was no viable substitute. 2012 saw BT Sport enter the market for sports rights - BT's intention was to use high profile sports content to drive customers towards using its fibre-based services. The old analogue system was switched off in 2012 and by 2013 content could now be viewed via:

- 1) Digital satellite television
- 2) Cable television
- 3) Digital terrestrial television
- 4) IPTV
- 5) Laptop, mobile and tablet
- 6) DVD

A range of enhanced television broadcasting developments had also been introduced, including:

- a) TV anytime, viewer-determined consumption utilising time shifting
- b) TV anywhere, content viewed via laptop and tablet computers, plus smart phones
- c) Interactivity, viewers could participate by giving comments, voting and receiving additional information or VOD programmes. Smart TVs were Internet compatible, connecting via the TV receiver, set-top-box, broadband router or a manufacturer application.

Against a backdrop of wider change, the ways broadcasters organised and transmitted their content began to move on from established and largely manual methods.

### **The transition to digital transmission**

From the mid-1990s broadcasters began to introduce software and digital media server-based systems to control key aspects of the transmission workflow. A broadcast technology expert, speaking in 2013, confirmed these media servers “enabled true multi-channel broadcasting, which was never possible using videotape.” It is the ability to *simultaneously* broadcast several channels to different territories that is significant<sup>48</sup>. Early in the new millennium media servers became pivotal to transmission operations. As more affordable media storage and more powerful servers became available, managers realised that more media could be placed on the central server for play out; a senior transmission manager recalls how servers were introduced:

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<sup>48</sup> This was particularly important for multinational broadcasters like Discovery.

Although tape formats remained for long form programme material and for interstitials, by 2000 or so, commercials in the UK were being delivered on MPEG2 files to play out providers. These files required boxes to receive material and servers to store the high-resolution files. (Senior broadcast transmission manager, 2013)

By using specialist scheduling-software, transmission could be fully automated. In 2002 Quantel introduced scalable hardware and software solutions<sup>49</sup> that combined browsing and broadcasting at the same time – again, when working with large volumes of content, it is the ability to do different things at the same time that is significant.

In 2004, the first ingest-to-air workflow automation was introduced and, from 2005, broadcasters began to ingest their entire broadcast content onto central servers. But transmission was not yet tapeless; the reliability of Digital Betacam systems moderated the introduction of file-based systems, plus broadcasters' libraries were still full of videotape. Tapes were used for making copies of programmes and for re-versioning purposes, like adding different languages or subtitles. Unlike tapes, which were visible assets, file-based content had to be ingested with the correct metadata attached otherwise it could disappear on the system. Speaking in 2013, a director of transmission notes: "storing and transferring files, particularly via the Internet, also raised the risk of piracy"; this remains a global concern among media providers.

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<sup>49</sup> The sQ server part of the *generationQ* product line.

## **The digital hangover**

The transition from analogue to digital transmission has been beset with operational issues. As different files are created using different codecs<sup>50</sup>, difficulties in reading files can arise; transmission experts confirmed incompatibility was a wide-ranging problem in transmission suites at all media providers. Media Asset Management (MAM) systems were introduced to help move files through the full transmission workflow, from receipt and ingesting, QC, encoding and transcoding, playout, repurposing and archiving. However, speaking in 2014, an experienced Director of Transmission had “yet to see a system that offers a definitive benchmark in reliability and performance”. An unwanted by-product in the proliferation of content delivery platforms is a loss of a common operational standard across the array of file-based formats now used, in other words the more platforms using file-based media there are, the more confusion is created.

## **Transmission in 2014**

Digital transmission saw the number of channels available in the UK increase dramatically. In 1992 there had been 4 terrestrial broadcast channels; 22 years later the Sky platform alone listed 36 exclusively sports-based channels. In 2014, BSkyB and BT are engaged in communications technology convergence. BSkyB offers television, broadband, Wi-Fi and telephone services, as does BT; both use high profile sports content to attract customers. All major terrestrial broadcasters offer additional viewing platforms like iPlayer for viewing content, either live or on demand. And

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<sup>50</sup> *Codecs* are the structure used to create a file. *Transcoding* is the transfer of a file from one format to another. *Encoding* is the creation of a file as a result of transferring content from videotape.

beyond that, providers like Yahoo offer clip-based content services, many of which can be viewed streamed on national newspaper sites.

From this brief overview we can take away the following:

- 1) The tapeless transmission workflows adopted by many broadcasters have yet to offer a coherent path from content creation through to final broadcast.
- 2) Quality levels for different outputs has expanded, making it impractical for all output to be delivered from a single point. Workflows must take into account the various ways that content is to be used, as this varies significantly from platform to platform.
- 3) There has been a rise in multinational broadcasters that simultaneously provide global markets with repurposed content<sup>51</sup>, from large providers like Discovery and NBC Universal to micro-broadcasters like Paris-based Trace Sports Stars<sup>52</sup>.
- 4) The ability of domestic UK media providers to handle many more feeds has allowed additional pop-up channels, or where, for example, Sky Sports viewers can chose to watch up to 8 UEFA Champions League matches at the same time via the red button option.

These developments are relevant because (a) transmission was the first area to adopt digital server technology, (b) sport is an important driver in the take up of new broadcasting technology, (c) live sport broadcasting rights have escalated in value due to increased demand, (d) the distribution of television content has generally become much more specialised, (e)

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<sup>51</sup> A single original programme can have 13 distinct outputs in different languages.

<sup>52</sup> Trace Sports launched in the UK in late 2011 (channel 442 on the Sky platform) In May 2014 it is no longer broadcasting on Sky in the UK.

content can be more tightly focussed on smaller groups of consumers, particularly via pay-TV and (f) further consumption data can be tracked and compiled and this, in itself, has a financial value to broadcasters as they sell access to audiences to sponsors and advertisers.

## **4.2 Production technology, the analogue paradigm**

In the early 1990s sports production workflows were constrained within an analogue paradigm, this section explains the limits of analogue technology and production methods including an indicative workflow from 1992. This football production workflow is used to benchmark the transformation from analogue to digital and to pinpoint how production methods have changed.

### **Analogue technology and tape-based workflows**

The key limitations of analogue technology and tape-based workflows are particularly evident when looking at videotape recording, videotape editing, graphics inputs and audio recording.

In 1992 videotape was the primary medium on which to record, edit, play out and archive sports content. Incremental advances were made, like variable replay speeds and increased portability of smaller formats (like Sony Betacam) and videotape operations remained at the heart of all sports productions – in a sense this was the engine room<sup>53</sup>. The two most obvious limitations of analogue videotape are (1) the ability to make copies (this was done in real time and introduced deterioration with each copy made) and in (2) editing, where the fixed timelines of videotape were very restrictive. Once an edit was made the timeline was fixed, it wasn't possible

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<sup>53</sup> Producers that worked at a broadcaster in the 1990s would know this term.

to replace one sequence with a longer or shorter sequence as it was with film, where the edited sequence is literally cut open and the new sequence inserted. As sports content was mostly prepared using 2 machines, then creating a wipe or a mix, rather than a cut, was troublesome and involved copying material to a third machine. The independent production company Cheerleader<sup>54</sup> introduced 3-machine video editing to sport, 3-machine editing was more typically found in entertainment programmes and US sports presentations.

Videotape recordings were crucially important and a hand-written log sheet accompanied each tape. The log was a description of all content along the timeline (typically time-of-day timecode that looks like a digital clock), the log was made by an assistant producer during recording and was the only method of knowing what was on each tape, if the log was lost the tape was useless until re-logged.

For graphics, input was mostly limited to the Aston caption generator, with the Chyron equivalent providing a bolder US style. The telestrator was an infrequently used device that allowed a commentator to draw basic lines on screen (for example, over a video replay) to highlight relevant action. As this was used on US television it was not encouraged in the UK. However, BBC Sport became an early-adopter of digital technology when it introduced a computer-based results service in the late 1980s. The system was able to handle very quick data input – for example Saturday afternoon football results (when most games were still played on a Saturday afternoon) – and

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<sup>54</sup> I worked at Cheerleader across all output between 1987 and 1994.

tie this input (the scores) to pre-designed fixtures lists allowing for much quicker presentation of the final scores.

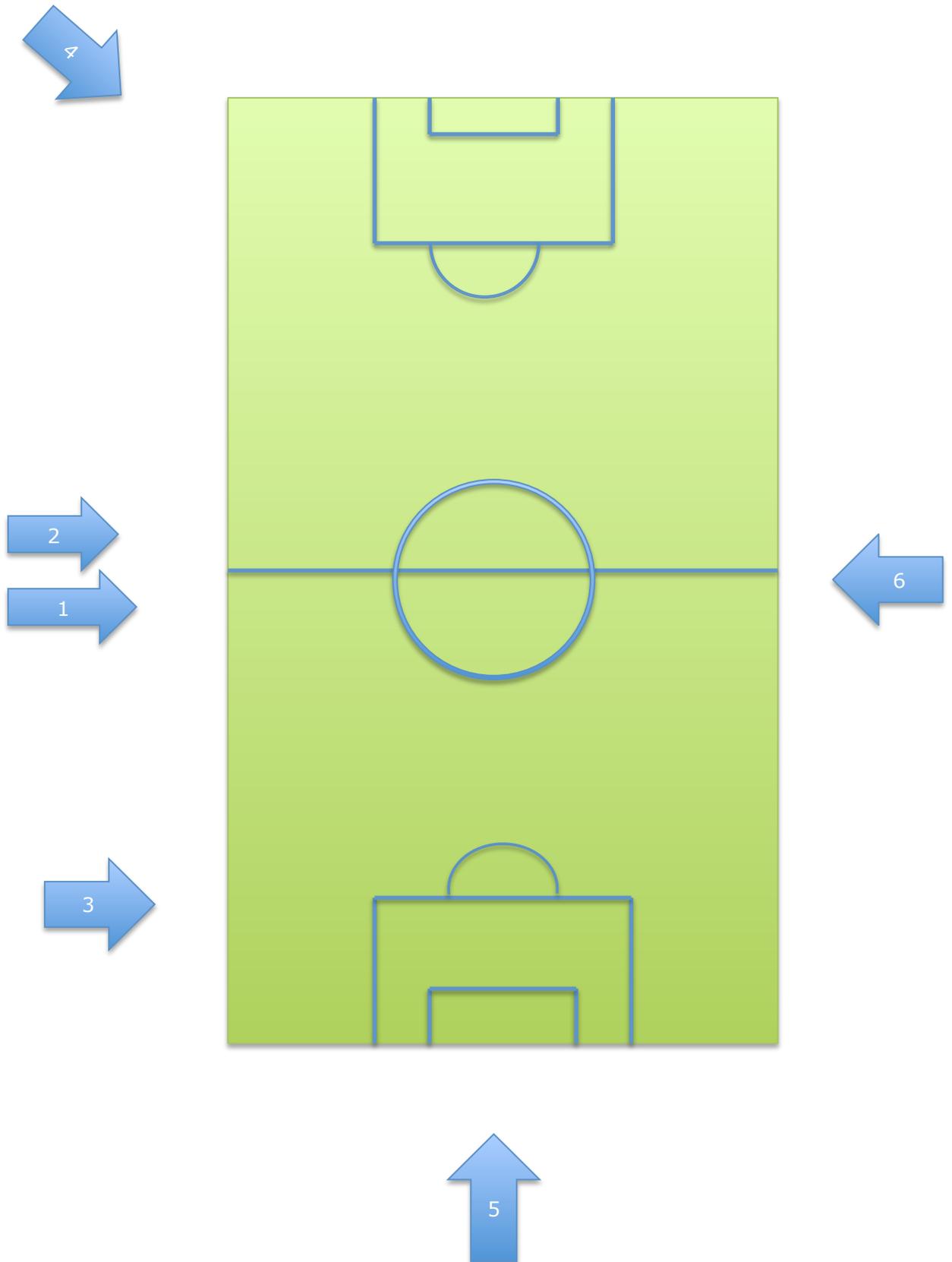
Finally, audio recording and mixing was subject to the same generic limitations as videotape editing. Recording was restricted to the number of tracks available on videotape. As new tape formats like Betacam were introduced, even recording basic stereo became challenging (due to limited tracks) so, in some important respects, audio recording was very limited for a while. However, in 1993, audio provided an introduction to digital technology for many producers. The ability of digital audio mixing to move material around on the timeline felt revolutionary in the flexibility it offered.

Experienced producers recall that, in most respects, working in analogue demanded conscious preparation (finding tapes, logs and timecodes) was generally laborious and slow to achieve even modest results.

### **Typical workflows, 1992**

Turning to football for an example of the analogue paradigm, around 6 cameras were typically used on any match. Of these, at least two would have long telephoto lenses to provide close ups of players and reactions of managers (figure 4.1).

Figure 4.1, 6 camera plan for football



For a 6 camera outside broadcast, using 3 videotape replay machines was typical. Any videotape replays required the machine to stop recording, spool back and re-cue the action before it was ready to play back at a reduced speed. The mixer console handled camera and graphics inputs and offered a variety of transitions from cuts to wipes. A typical desk would have a maximum of 48 inputs and a single graphics source. A separate, smaller truck would be on location to handle onwards distribution of output, via BT Tower to the broadcaster's base.

An outside broadcast of this nature could be self-contained and would not require a large number of production staff; normally a producer (or producer/director), an assistant producer and a production assistant would suffice. For the BBC, outside broadcasts were not often stand-alone, but part of a larger presentation, such as Grandstand or Match of The Day (MoTD), but even the BBC's flagship football magazine was not an onerously complex production.

Match of The Day was presented from a dedicated sports studio at Television Centre. A programme editor ran the production with an assistant editor, a studio producer/director, production assistant and a team of assistant producers in the videotape area preparing match action and any analysis clips for broadcast.

Key to the MoTD operation was a network of incoming lines that carried feeds of each game back to Television Centre. From 1992 this included shared feeds from games covered by Sky Sports, but minus Sky's commentary team, graphics and video effects – known as a clean feed. As

each game was received an assistant producer would log the action, using timecode as a reference, then work with a VT editor to edit the match to duration.

Match of the Day typically broadcast 3 matches, and, from 1992, included a round up of the goals scored at all other matches. Each segment was routed to the studio via the VT multiplexer, a switching device that handled a large number of VT inputs, but offered just 2 outputs to the studio gallery. A senior assistant producer, or for bigger productions a VT producer, would run the multiplexer to ensure the correct content reached the studio. After each broadcast, tapes and logsheets were gathered for archiving the key recordings in the sports library.

A bit like the practices previously used in transmission, equipment behaved as expected and worked well (within its limits) and these workflows were seldom subject to much in the way of change.

### **Live Premier League football, Sky Sports style**

As noted in chapter 3, in 1988 ITV acquired the rights to show 18 live league matches a year. Coverage moved from 6 cameras to 17. As a result Boyle and Haynes (2004:19) consider ITV to have raised the status of live football coverage, but it was the launch of the Premier League of Sky Sports that really moved the goalposts. From August 1992 Sky Sports offered live and exclusive coverage of 60 live Premier League matches per year. In terms of technology, a significant change was the introduction of subscription-based broadcasting that used encryption of the satellite signal as a turnstile for viewers. Reviewing production technology, the Sky Sports

formula was less about new technology than using *more* of the existing technology and doing so in different ways.

Several aspects of coverage immediately stood out: the introduction of the game clock and the always on score caption, a consistently high number of cameras covering action, more close ups including the use of Steadicam<sup>55</sup> along the touchline, the prominent Quantel swoop (with sound effects) that accompanied replays, more frequent use of reverse angle replays, and Sky Sport's distinctive graphics. But the presentation style was not entirely new, as a dedicated sports channel executive observes:

Sky went about copying a variety of styles and looks from US TV and rolled them out in the UK, including presenters looking to camera and presenting styles that were direct lifts from US TV. (Sports channel executive, 2012)

The similarities with US sports broadcasting did not end there, some programme titles even sounded American, including *The Monday Night Football* taken from ABC's long-running NFL flagship *Monday Night Football*<sup>56</sup>, or *Super Sunday* again used on NFL. Where Sky Sports did begin a new chapter in television coverage was with more detailed match analysis, in part this was due to the additional time the channel had to fill. Also evident was an aggressive new marketing philosophy used to promote the Sky Sports brand.

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<sup>55</sup> Steadicam is a camera stabilising harness that allows tracking with much smoother results than if hand-held.

<sup>56</sup> With the introduction of Sky's Sports Centre US broadcaster ESPN seriously considered legal action against BSkyB for copyright infringement for its own format the ESPN Sports Center. From discussions with an ESPN executive in 1993.

For Sky Sports it is the *different* ways technology was used that is more significant than what was used. In ways that are reminiscent of ABC executive Roone Arledge's up close and personal philosophy, Sky Sports used more technology as it sought to stand out. Soon competing channels were promoting key points of difference in their coverage to lure potential customers. Speaking in an article in the Daily Telegraph (18 April 2011) Andy Melvin Sky Sports deputy-managing director captures the mood:

I had spent 10 years covering football in Glasgow where everyone looked down on sports broadcasting as an irrelevance. TV then was dominated by luvvies and by news junkies, neither of whom had the slightest interest in sport. But then I joined Sky and felt we had been given this incredible opportunity.

It was a huge gamble, and the sceptics said, 'This will be shit TV, real lowbrow stuff'. But we were a team of football people, making programmes for football people, and we were determined to make it work. (Briggs, 2011)

The mantra was more, but just how far could outside broadcast operations grow? As an independent producer I recall how outside broadcast trucks began to literally expand to accommodate more equipment and people. At the biggest sports events there were separate trucks for the gallery, another housing videotape operations, sometimes yet another truck to control the presentation studio output. In terms of videotape operations, it was possible to increase the number of inputs but that meant increasing the number of tape machines and finding (a) a place to put them, (b) means of wiring them into the system and (c) managing the mountains of tape recordings generated. The analogue paradigm soon presented a very real

physical limit to what could be achieved. The sheer size of equipment racks, the amount of cabling, the number of logging and editing stations, the ability to input raw material from different sources, including more and more cameras, into more powerful mixing desks, plus the ability to output the final programme could only expand so far.

### **Vertical integration or free market provision of technology?**

A change in the impetus in the development of production technology in the UK can also be noted in the 1990s. Historically, technical support for studios, outside broadcasts and editing systems was a matter of vertical integration, particularly at the BBC where virtually all aspects of technology, engineering and logistics were all under one roof, or at least one metaphorical roof. To some extent the regional ITV companies replicated this as they shared resources. Whilst BSkyB had built their own matrix of incoming and outgoing lines, editing and studio facilities at their base in Isleworth, significantly the company did not invest in outside broadcast equipment and, instead, chose to rely on external firms to provide technology for location use. This clearly reduced the need for large-scale capital investment whilst allowing access to the newest equipment as it became available on the facilities market.

The provision of production technology was also altered by the activities of specialist technical service suppliers working with independent sports production companies. The Broadcasting Act of 1990 with the introduction of independent and regional production quotas had already boosted free market provision. As independent sports production companies generally lacked the capital to own expensive production equipment, so they entered

commercial relationships with specialist outside broadcast facility firms and post-production houses.

For video editing, it wasn't traditional broadcasters that were on the frontline when it came to providing state-of-the-art equipment; it was often commercial post-production houses. The role of post-production houses and other technical service providers is often overlooked. Independent sports production companies now had more choice and access to the latest technology without incurring prohibitive capital costs. This market paved the way for some important innovations as digital technology was rolled out.

### **4.3 Digital production technology arrives**

The mid-1990s was a critical period as digital production was introduced to television sport, changing work practices and output in several significant ways.

Although live broadcasts were growing in prominence, videotape remained the hub of television sports productions. But the capability of videotape was changing. From 1994 Digital Betacam enabled the entire acquisition to edit path to be converted to digital. In addition to higher quality and more robust video and audio signals, more creative options in editing became possible<sup>57</sup>.

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<sup>57</sup> Digital Betacam meant media could be pre-read using this as the edit source without needing an additional machine. Cloning (copying) of tapes could be achieved without the significant loss of quality associated with analogue tape.

However, the two most significant introductions combined to (a) provide a dramatic change in sports production workflows, particularly large-scale productions, (b) revolutionise the volume and scope of sports content, including (c) the speed at which content could be produced. These were non-linear editing systems and tapeless digital media technologies.

In terms of non-linear editing systems, AVID became the preferred tool. Essentially AVID is a hard disk (computer) system with software that mimicked the flexibility of 16mm film editing. Once media has been ingested<sup>58</sup> to the AVID content could be edited and re-edited as required. As this is non-linear and non-destructive, sequences can be dropped into the timeline with the remaining material pushed down the timeline (in effect extended to accommodate the new sequence) – this is very different to linear videotape editing with its fixed timeline. As AVID marketing put it producers could now “change your mind without losing your mind”. This claim was severely tested in early AVIDs as one producer recalls:

It [AVID] was horrible. Not because it was a bad thing but because of the bugs. It was hard to do anything. It would always freeze up. (Senior sports producer, independent sport production, 2012)

New iterations of AVID offered more processing power (they got quicker) and storage for more media (they became more useful). As AVID was widely adopted a demand grew for a central storage facility, or central server, that could provide regular back up as well as shared access for multiple AVID users. The AVID Unity was that device and could serve up to

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<sup>58</sup> Content is played in from tape, the AVID makes a virtual copy that can be broken down into smaller sequences and allocated to bins from where it can be retrieved.

20 clients, this made it an appealing tool for host broadcast operations where multiple rights holding broadcasters wanted to access all material as quickly as possible. This system provided a very significant breakthrough in production workflows, with coverage of the World Rally Championship provided by Chrysalis Sport, one of the earliest examples of AVID Unity deployment. There are three breakthroughs of note: (1) the ability to use non-linear editing to construct entire programmes, (2) *simultaneous* access to the original content for (3) *numerous* users. This meant no more copying of videotapes in real time, just plug-in with AVID, access the server and edit. Multiple output versions could now be generated from the *same original source content* as different productions worked in parallel. The increase in volume, scope and speed this provided wasn't just substantial it was a game changer.

Turning to tapeless digital media technologies, EVS is the key development. The power of EVS rests in its capacity to ingest live input from multiple sources (cameras) and to replay, and/or clip together sequences virtually *instantaneously*, without any interruptions to workflow – no action need ever be missed. Experienced directors confirm that EVS operators became essential members of the outside broadcast team. A highly respected international live sports producer describes the advent of EVS and servers:

The tape-based environment was gone and an 8 channel EVS, whilst taking up the same space as 4 videotape machines, was much, much more capable. If you wanted to, you could start a replay of a cricket ball being bowled *before* the delivery was actually finished... it was simply revolutionary. (International sports television director, 2012)

Another veteran live sport producer sees the development of replays in digital production as creating a major talking point among viewers:

EVS allows you to isolate nearly every camera and to choose from around 20 different replay angles. So, when you want to review, say, a penalty incident, you have 7 or 8 angles ready to look at immediately. The way replays have changed is one of the single biggest step changes in sports coverage. (Live sports director, 2013)

The EVS was extremely fast and delivered multiple replays. Soon EVS servers could be linked, this meant that very large amounts of media could be moved rapidly before being played out from another EVS. Speaking in 2012 an experienced live sports director sums up the consequences: “with digital, the scale of outside broadcast ambitions really began to increase.”

Post-2000, EVS provided media management systems that could be linked to a permanent archive system<sup>59</sup>. Content could be pushed between locations but was still available for instant broadcast. The implications for sports production methods were enormous as, unlike transmission, sports production now had a *fully integrated digital workflow with common standards* that everyone could work with.

EVS has also had an impact on incoming feeds of live sports. An example is Sky Sports coverage of NFL, this feed has US pattern commercial breaks with internal US programme promotions and numerous sponsored segments. Sky Sports routes the incoming feed through EVS where it is delayed for up to 3 minutes allowing Sky Sports producers to manoeuvre

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<sup>59</sup> Using EVS Logging and IP Director software in combination with a central server housed at a fixed location. Media storage included ‘nearside’ storage for day-to-day use and ‘far side’ for longer-term archiving.

their way in and out of unwanted material via their own studio presentation. The result is a presentation minus the distractions that still feels as if it is live<sup>60</sup>.

Although new digital recording formats were introduced for cameras and a range of specialist computer graphic paintboxes also developed, the introduction of AVID, central servers and EVS was by far the most significant development as new workflows offered a combination of speed, volume and scope that was radically different to the limitations of the analogue methods they replaced.

### **Digital broadcasting takes over**

In the UK the launch of Sky Digital in 1998 was significant. Digital broadcast signals are more robust than analogue, plus improved compression methods meant that the scarcity issue with analogue frequencies was no longer relevant. With continual improvements in compression not only were there more channels but these channels could also be cheaper to operate.

A further development was high definition (HD). HD is not clearly defined; it is simply a higher definition than standard definition. According to an experienced senior Sky Sports director speaking in 2012, HD was the “logical expression in the up-scaling in capability that digital allowed”. The director continues to explain:

The switchover to HD was taken very seriously by Sky Sports. For example, a 4 day cricket match at the Oval was used as a test bed for the entire production team, including the

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<sup>60</sup> Athletics and golf coverage also goes through EVS.

signal pathway from the Oval, via BT Tower and back to Sky Sports (but was not sent to air).

(Sky Sports director, 2012)

Whilst the production team wondered whether they could track a fast-moving cricket ball with HD cameras, or how a presenter's make up might look under increased scrutiny, the director confirmed:

The picture side worked out smoothly, it was in EVS/VT<sup>61</sup> and sound where they had to work hardest. Sky Sports also introduced 5.1 Dolby at the same time and this had different delays compared to 2 track stereo so, altogether, this was a big step up. In EVS/VT, the biggest headache was how to incorporate an SD picture [4x3] in the HD output [16x9]. (Sky Sports director, 2012)

Since 2004-05 the adoption of digital technology has revolutionised sports production workflows; it has enabled an exponential increase in the *volume* of sport produced, it allows a wider *scope* of sports content to be made and production is *accelerated*.

#### **4.4 Contemporary digital production technology and workflows**

Digital technology facilitated a dramatic increase in sports production output - it was the extension of ways the *same original content* could be *simultaneously* re-packaged in *alternative formats* by *different users* that was pivotal in meeting the rising demand for sports content. In addition to the technological dimension, a political economy approach requires an interest in who does what and why. To help answer these questions, and to

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<sup>61</sup> Although EVS is the predominant technology, the traditional VT (videotape) name was retained.

gauge the full scale of this remarkable transformation, previous analogue workflows can be compared with a contemporary case study.

### **Football on the frontline**

In 1992 the BBC's Match of The Day format provided a sample workflow (see 4.2 above). By the 2013-14 season a battle for the UK's live football viewers was being fought between challenger, BT Sport, and market leader BSkyB. But, away from the headlines, there is another Premier League football provider. Without attracting much media attention the Premier League operates its own production service.

Why does the Premier League offer this service? Whilst domestic rights for 2013-16 are valued at around £3 billion, the international rights are worth a further £2 billion (Harris, 2012), this is an important new market. Seeking to collect this revenue the Premier League controls its intellectual property according to a senior executive in charge of output speaking in 2013, "via a guaranteed standardised and high quality output aimed at a global rather than a local (UK) audience". How the Premier League provides this service is now discussed.

### **Premier League Productions (PLP)**

Set up in 2004, Premier League Productions (PLP) is funded by the Premier League and operated by IMG Sports Media. PLP offers content production, distribution and archive management for the Premier League. The following

account is based on testimony from participants plus fieldwork as participant-observer<sup>62</sup> during summer 2013.

At the start of the 2013-14 season, Premier League Productions delivered content to Premier League Licensees in 212 different territories. Using digital technologies and integrated production workflows this is a modern football content factory; the scale is unmatched by any other sports league.

### **What does PLP do?**

Primarily, PLP takes the original match coverage provided by the Premier League's host broadcast partners, Sky Sports and BT Sport, and, with some modifications, re-broadcasts all 10 matchday fixtures across a weekend making these available to the Premier League's international Licensees.

Figure 4.2, Host to Licensee pathway



On behalf of licensees, PLP also provides small local enhancements to this coverage, including in-vision customisation from Premier League venues. Specially enhanced feeds and multiple-match packages are also offered.

PLP produces a very high volume of content in a variety of live and pre-recorded formats, from news to classic matches. Together, the live

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<sup>62</sup> I wrote a consultancy document for the German Bundesliga whilst executive producer at IMG in 2012. This involved extensive benchmarking and content comparison with a range of football-based content including the Premier League.

matches, special feeds and formatted programming comprise a core production offer.

By adding further studio-based programming, both live and pre-recorded, PLP has, since 2010, also offered a full content service (in other words, a stand alone fully scheduled channel that runs 24 hours a day 7 days a week for 42 weeks each year). Via a dedicated digital department PLP also provides short-form material for [www.premierleague.com](http://www.premierleague.com).

As the domestic broadcasting rights to live Premier League football in the UK (154 games per season, 2013-16) are held by Sky Sports and BT Sport, PLP content is focussed towards the Premier League's overseas partners. If you see a Premier League match outside the UK then you will be watching PLP output.

### **Digital technology applied**

This section explains (a) the technology used in a contemporary digital production environment like PLP and (b) how this technology has been configured to enable a remarkable increase in the volume and scope of output including the speed with which this output can be produced. This example also underlines Mosco's claim (1996) about how commodification and different outputs:

... intensify the commodification process by linking increasingly specific kinds of programming to increasingly well-defined audiences. (Mosco, 1996: 152).

The technology used is EVS and AVID. EVS is at the hub of contemporary sport production operations, managing media at outside broadcasts or a studio base. The combination of EVS technologies and software systems – IP Logger and IP Director software– is the foundation for content logging (descriptions of content and other relevant metadata), clipping together content (a faster option than AVID editing) and the storage and movement of large amounts of media instantaneously between galleries, edit suites and MCR (MCR is the technical control area where all routing is managed).

AVID non-linear edit suites are the factory floor, the edit rooms where content is assembled before output. AVID edit bays are linked together via nearside archive systems – these can be EVS, Viz Ardome<sup>63</sup> or AVID Unity – shared media can be accessed quickly and by multiple producers. Far side storage is a longer-term archiving solution where content is held offline and is, therefore, not available for immediate use.

The key points are: (1) these systems feature a high degree of connectivity which allows large amounts of media to be moved around rapidly, (2) multiple producers can work on the same source material simultaneously, therefore (3) the volume and scope of output is dramatically increased as is (4) the speed of production. This is a quantum leap from earlier linear tape-based analogue systems. An example of how content flows from the initial match to international licensees follows.

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<sup>63</sup> Viz Ardome is media management system that allows multiple users to check the availability of media directly from a desktop link. Available information includes when material was last used and if there are any special rights restrictions.

## **Premier League, from stadium to international licensee**

### **Host Broadcast Partners**

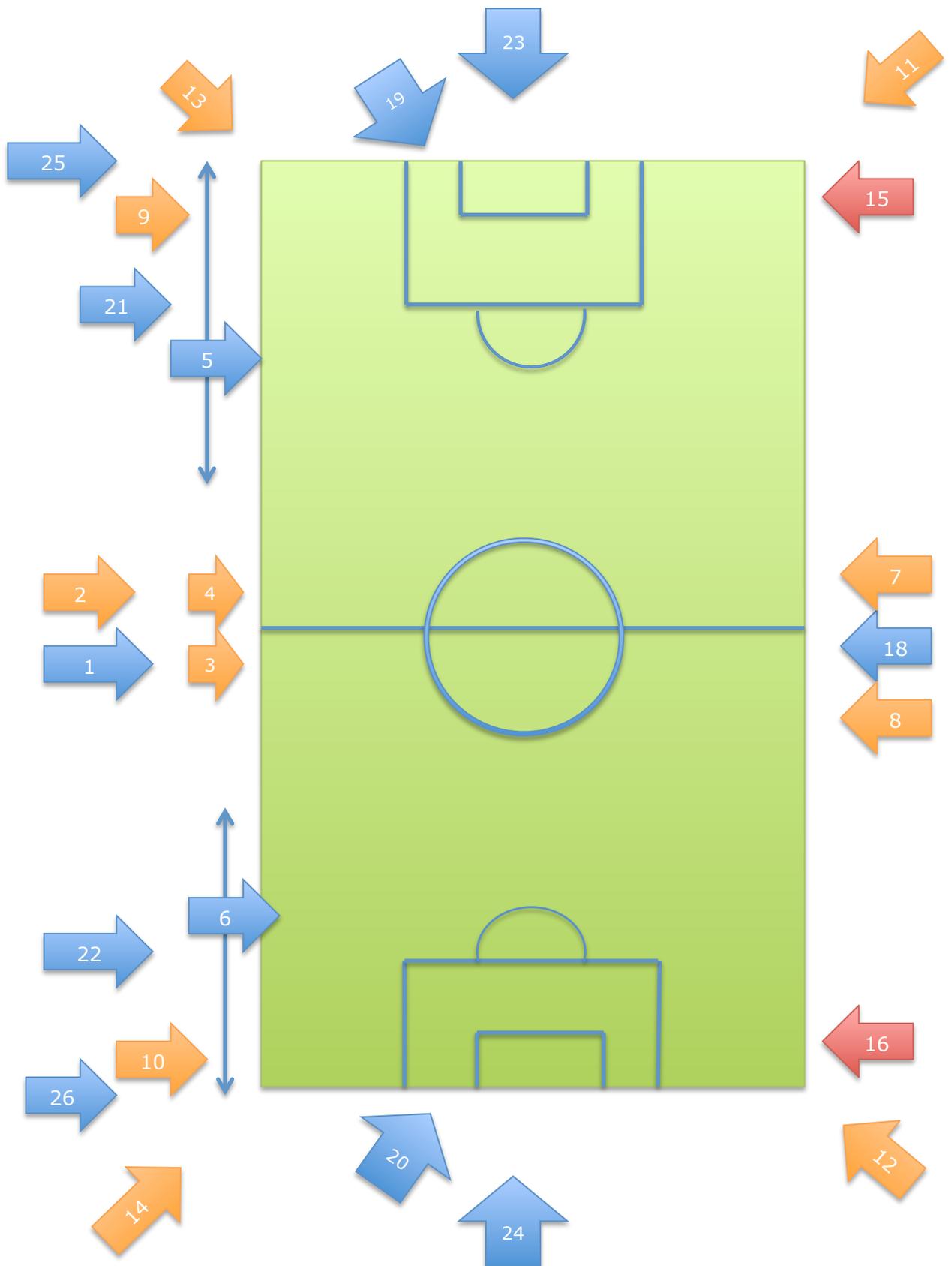
The Premier League's host broadcast partners are Sky Sports and BT Sport. They are responsible for covering 154 matches a season (2013-16) for UK broadcast, with all 380 matches covered for international output. An illustrative camera plan<sup>64</sup> for a match in the 2013-24 season is set out below, followed by the onward production pathway, via PLP, to the Licensee.

Compared to a 6 camera plan from 1992, there are now, typically, 26 cameras deployed. 6 cameras provide Super Slow Motion. 2 Ultra Motion cameras provide additional high levels of detail. All camera output is strictly assigned to EVS; this is done to ensure superfast replay reactions whenever called for by the director.

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<sup>64</sup> This is an indicative plan as all camera positioning is subject to case-by-case restrictions imposed by the individual stadia.

Figure 4.3, Illustrative HBP PL Camera Plan



Blue = 20:1 lens  
Orange = 86:1 lens (Cams 9-14 Superslo)  
Red = 100:1 lens with Ultra Motion

In a typical analogue outside broadcast truck the vision mixer console was limited to a maximum of 48 inputs, an international sports director explains the differences:

Digital switchers [vision mixer desks] now have up to 168 inputs, 8 channels of EVS is pretty standard, plus 3 different graphics sources are a fairly normal specification. The technological changes within a fully digital operation mean that, in the same space as older outside broadcasts, there is just so much more capability. (International sports director, 2012)

Being able to generate many more replays via EVS also means more production and/or EVS operators are required to select and manage this media. Similarly, the increased demand for statistics and graphics means either 1 or 2 assistant producers are assigned to this task. Whilst the host broadcast partner match coverage is for local UK viewers, Premier League Productions re-orientates all match presentation towards a global audience. How this is done is now reviewed.

### **The digital production environment**

Premier League Productions receives a clean feed (match coverage minus Sky Sports and BT Sport commentators, graphics and other embellishments such as station identification) from all Premier League matches covered by the host broadcast partners.

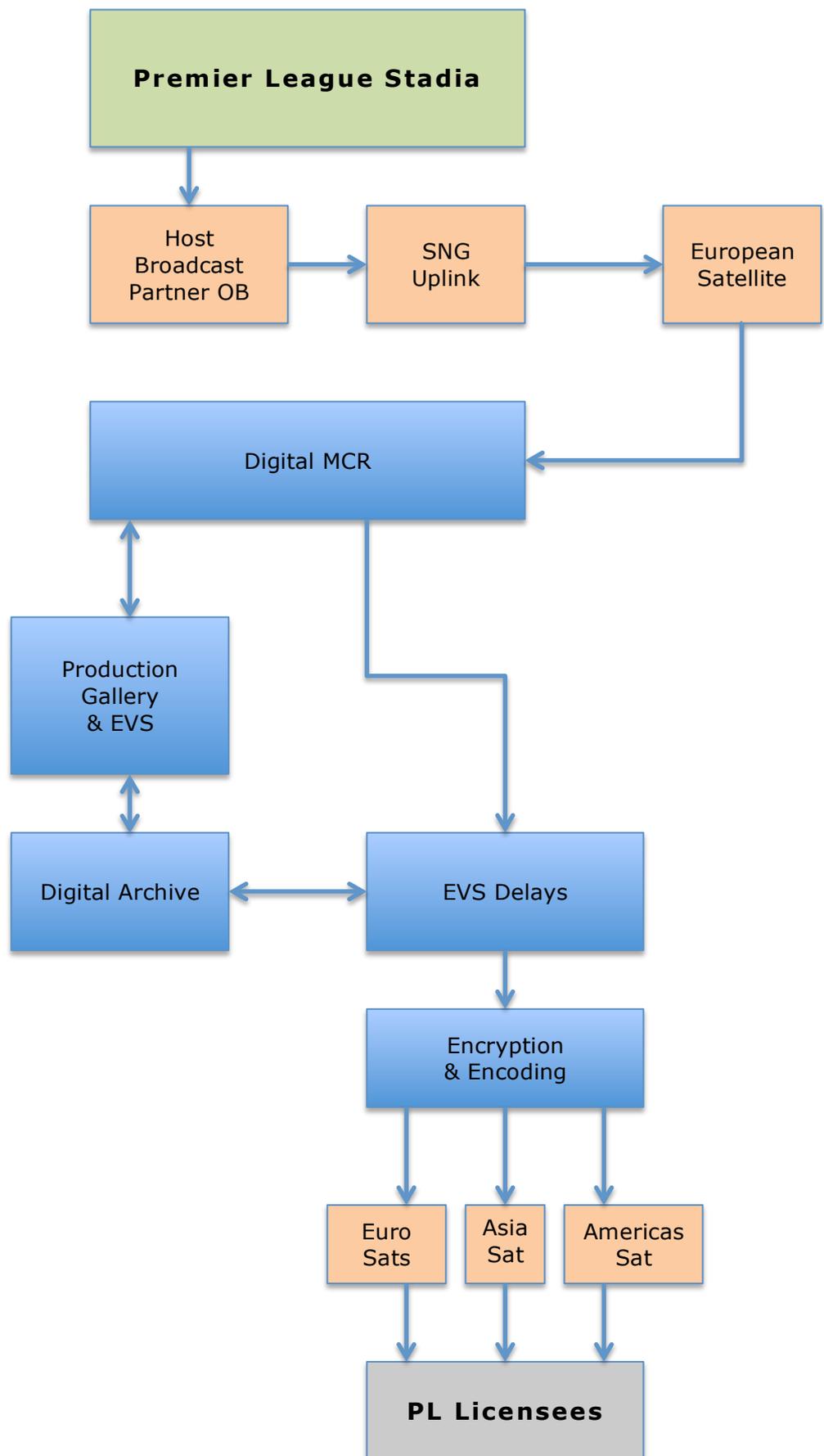
To provide a standardised high quality output of all matches, the PLP production team consists of about 8 people - a director/vision mixer, 2 producers, 2 assistant producers, 2 EVS operators and a graphics operator.

Standardised high quality output is a crucial idea that recurs in the context of UEFA, FIFA and Olympic host broadcast operations. In essence, this means adding a new commentary and bespoke Premier League graphics (information on the teams, their line ups and scores/duration during the match). Highlights are also provided at half time and at full time, statistics are added plus any reports, flash interviews and press conference material when available.

As the match is fed into the production gallery, an assistant producer uses IP Logger software to produce a detailed description for editorial and Archive use. This metadata remains attached to the media as it moves from EVS nearside storage, to the AVID, back to EVS or Ardome and then to archive. Compared to the hand-written notes made in the early 1990s (which could be of variable quality and were prone to being misplaced) IP Logger provides comprehensive data for multiple users.

The new output from the gallery is returned to MCR before onward routing to European, Asian and American satellite distribution and then to its final destination, with each of the 212 Premier League Licensees (figures 4.4 and 4.5).

Figure 4.4 – PLP signal path, from PL Stadia to Licensee



## **Digital production workflows**

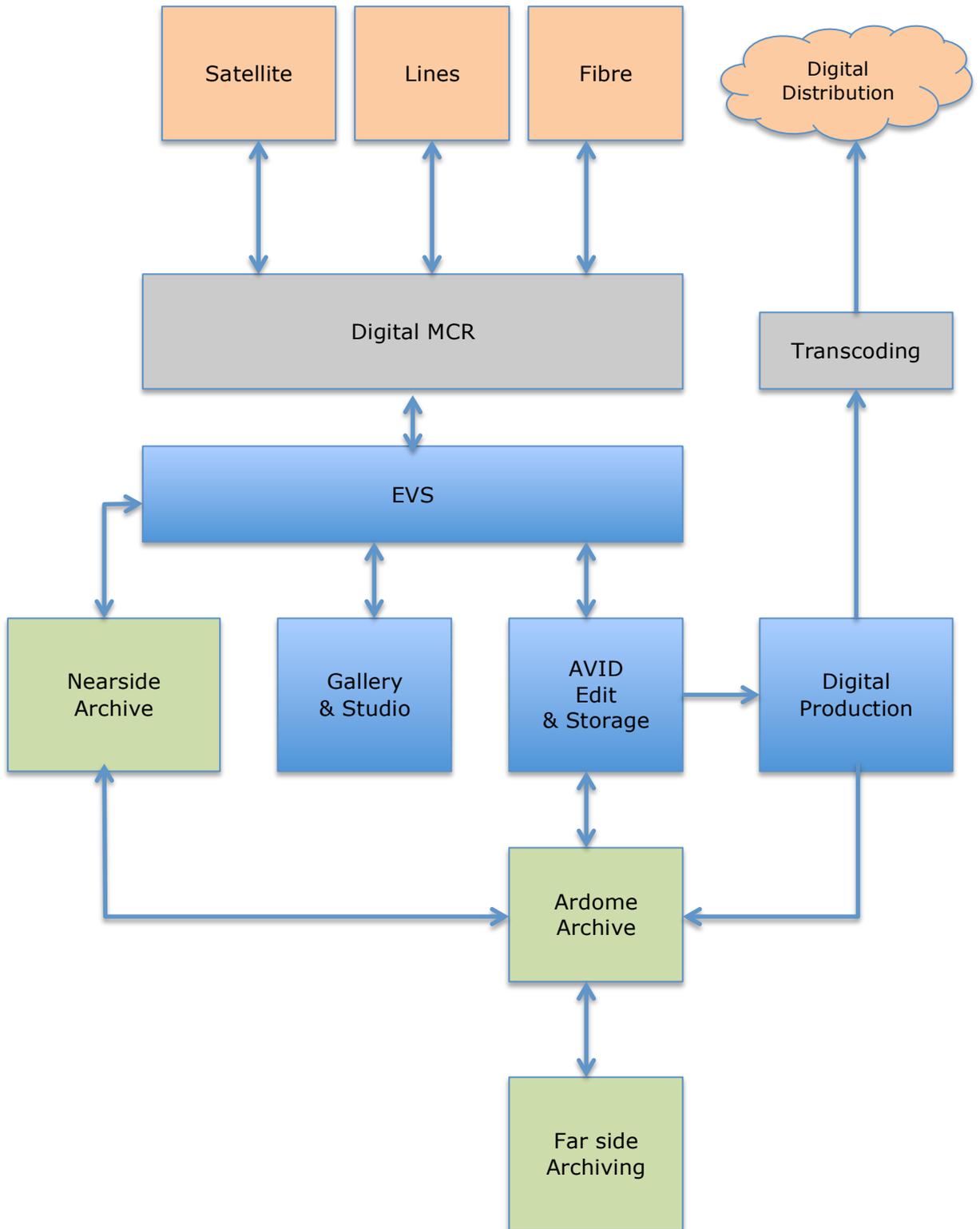
The power of digital workflows, as expressed by Doyle (2002:30), is the ability “to reduce all sorts of images, sounds and text to a common format and to transport these via a common distribution infrastructure”. What should be added to this understanding is the ability of numerous outputs to be created simultaneously, hence output is accelerated and volume increased. This is the fulcrum around which sports production processes now revolve – in a sense it is a powerful digital hub that allows content to be ingested, produced, modified and re-packaged, broadcast and then archived.

Looking at the Premier League, the objective is to take 154 matches produced locally in the UK and reversion output as an international standardised high-quality presentation for use by up to 212 global licensees. In doing so Premier League Productions delivers the Premier League brand to the world.

Turning now to the full service content service, this is simply a more structured format for content delivery, one that allows licensees to lift out and broadcast individual programmes or, if preferred, to use the schedule as a standalone channel. This option is appealing for telecommunications companies that do not have the same infrastructure as broadcasters, including production staff. The full content service includes material from the core service, but adds a range of live and pre-recorded studio programmes, plus more match re-runs and archive-based content. The full service content is a live stream; this feed is routed to a series of regional satellites, where it is available for Premier League Licensees to access. The

step up to providing a full channel schedule requires a much larger volume of content (168 hours per week) plus a wider scope of programme formats.

Figure 4.5– Indicative digital workflow



## **Analysis and additional studio-based production**

To provide enough content to fill an entire channel PLP use a two-tiered approach: (1) sophisticated analysis tools are used as a focus for additional discussions with (2) studio-based programmes providing the primary format for this expansion.

In contrast to EVS, AVID and Ardome these analysis devices do not share a single operating system, meaning their incorporation is technically more challenging. However, they are important tools when adding scope to output. Of these the most notable are tOG-SPORTS Pro, the Viz-RT Touchscreen and Venatrack Real View<sup>65</sup>.

For the 2013-14 season the Premier League introduced *Goal Decision System* from Hawkeye. Used during the match the referee is informed (via a receiver worn on his wrist) if a goal has been scored, subsequent animations can be shown on the venue screens and used in match coverage. In 2014 there is no indication the appetite for performance related information is diminishing with more and more data being made available for dissection<sup>66</sup>.

What is crucial here is not the technological embellishment *per se*, but the ability to recycle original media in an increasingly wide range of new

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<sup>65</sup> Red Bee Piero is used in the BBC's sports coverage and available to independent producers for an annual license fee.

<sup>66</sup> Also worth mentioning is the adoption of the '1<sup>st</sup> and 10' graphics system developed by Sportvision for ESPN in 1998. Further versions were developed by Princeton Video Image (PVI) for CBS and SportsMEDIA for NBC. These systems create virtual 10 yard lines for NFL coverage, showing how far the offensive team has to move the ball from the line of scrimmage to secure a first down. These graphics systems have become embedded in NFL coverage.

programme formats. With more and more versions being generated from a limited quantity of original material the commodification process, as described by Mosco (1996) and Schimmel (2005), enters an unprecedented new level of activity. Whilst Sky Sports was the first media provider to provide significantly extended scope, this is an important development that is now being driven by the leagues and federations as they seek more control of their own output and additional revenues, particularly in international media markets. The output provided by Premier League productions provides a useful example.

#### **4.5 Output: significantly increased volume and scope**

Comparing the BBC's Match of The Day output from 1992 with Premier League Productions output in 2014 illustrates the remarkable increase in volume and scope that is possible using digital technology and workflows. In 1992 the weekly MoTD presentation was limited to 90 minutes. By contrast, Premier League Productions' full content service runs 24 hours a day, 7 days a week devouring 168 hours of content per week, around 65 hours of which is newly produced material.

Premier League Production's output is split into 4 categories for distribution to Licensees, including:

- Core Production - a range of live and recorded programmes, plus an additional 5 packages featuring enhanced feeds.
- Full Content Service – a fully scheduled channel (launched in August 2010) that delivers, Premier League content 24 hours a day, 7 days per week across 42 weeks per year in high definition.

- Archive-based Content - a selection of classic matches, greatest goals and golden moments from the Premier League.
- Digital Production – news feeds, press conference coverage, club guides and short features re-versioned from the core production.
- Distribution – from acquisition to multipoint distribution. Premier League Productions offer 3 packages with differing scales of cost and signal quality/reliability.

A brief review of each of the 4 output categories and distribution follows.

#### **4.5.1 Core Production: live**

Beyond the guaranteed standard of live match production, output is extended up to 40 times per year with a super feed. This is an enhanced live offer where licensees have the option for 5-10 minutes access to their own unilateral feed (for example, to have their reporter appear in vision inside the ground before the match). Additional replays of key match incidents, as well as isolated camera angles tracking individual players are provided. The Football Feast feed, is an extended presentation that includes up to 3 consecutive matches, plus a compilation of all the goals scored on a Saturday. Approximately 30 Football Feasts are offered per season.

#### **Core Production: pre-recorded and magazine content**

In addition to live coverage, weekly preview and review shows are offered, plus season preview and review programmes and a goals of the season compilation. There is a weekly magazine programme that focuses on lifestyle stories featuring Premier League players in the UK and from around

the world<sup>67</sup>, *Premier League World* offers high levels of production value and, reminiscent of the NBA's *Inside Stuff* magazine, it acts as a useful promotional tool for the Premier League.

#### **4.5.2 Full content service**

According to a senior PLP executive producer, from around 2007 there was a significant shift in the ownership of broadcasting rights:

Telecommunications corporations (Telcos) started to acquire broadcasting rights in direct competition with more conventional broadcasters. Whilst Telcos often have multiple digital broadcast platforms at their disposal, they seldom carry the support infrastructure associated with conventional broadcasters, including the technical facilities and experienced production staff to receive, make, schedule and deliver their programmes.

Although Telcos were hungry for attractive new content, many of these firms remained reluctant to undertake the financial commitment to produce their own programming to accompany their content acquisitions. (PLP executive producer, 2013)

Considering changes to market conditions, the Premier League and PLP devised a full content service model - this is a fully structured service that runs 24 hours a day, 7 days a week for 42 weeks a year. The high definition service provides licensees with content that can be aired as a standalone channel. In the 2013-14 season the channel is broadcast in South Africa and the Middle East, but in Singapore and on Sport 24 local programming is added at peak times in the schedule.

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<sup>67</sup> A story might follow Didier Drogba to the Ivory Coast to see some of his charity work. Interestingly, players' agents are often keen to expose their clients in *Premier League World*.

For the 2013-14 season, a typical week (168 hours) of full content Premier League service included:

- 42.5 hours of exclusive live content
- 52 hours of full match re-runs
- 22.5 hours of magazine content
- 25.5 of Premier League Archive material
- 25.5 hours of studio-based content repeats

The Premier League full content service combines the core production content and archive-based content and is bolstered further by live and pre-recorded studio programmes and magazine shows, including a football quiz format. The service turns to a range of studio-based formats to fill out the schedule. The studio formats include an exclusive Premier League news service; the Premier League claims, in 2013-14, it is the only football league that provides a 30 minute news programme, 3 days a week<sup>68</sup>. Further studio-based formats include a matchday goals round-up service, a daily highlights/review/discussion format, including detailed analysis. There is a heavy reliance on player performance statistics and subjective player ratings<sup>69</sup>.

A fanzone format includes fan access with contributors via Skype, in addition to the usual methods, such as SMS text, email, and Twitter. Fans provide a studio audience for a quiz format featuring representatives of all 20 Premier League clubs. To populate the various studio formats a substantial cast of presenters, pundits and named guests is required. The

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<sup>68</sup> Confirmed by a senior PLP executive producer speaking in summer 2013.

<sup>69</sup> Control of football related data is a growing business – the Premier League has a partnership with Football DataCo.

on-screen team stretches to around 30 people, including: 10 established presenters, approximately 12 football pundits and another dozen or so regular guests.

The full content service does not distribute commercial (paid for) content, but commercial time is offered to the licensees across the schedule. When licensees do not use this time it is filled with a range of interstitials, short promotions, archive clips, clips from magazine shows, picks of the week and top five/top ten lists.

#### **4.5.3 Archive-based content**

Since the early 1990s leagues and federations have realised the financial value of sports media archives. In 2013-14 the Premier League Archive is managed by IMG Sports Media via a separate contract: IMG seeks to exploit potential synergies between the Premier League Archive and Premier League Productions. The PL Archive team is responsible for advising on rights values and for additional one-off sales of Premier League content in the market. However, the contract with Premier League Productions also provides access to a range of archive-based content in various formats, including classic matches.

For the core production offer, archive content includes 75 classic matches, 40 golden moments, greatest goals programmes and a format called a *whole new ball game*. Unsurprisingly, archive use is extended further for the full content service offer, where 104 classic matches are presented. Best classics is another archive-based strand; these matches, sometimes featuring teams not currently in the Premier League, are broadcast over the

dark weeks when there is a break in Premier League matches to accommodate international football fixtures and during the summer recess. Archive-based content accounts for just over 15% (25.5 hours) of the full service content provision.

#### **4.5.4 Digital production**

Content produced by Premier League Productions has been re-versioned for use on [www.premierleague.com](http://www.premierleague.com) since 2007. The bulk of digital production is made up of: 1 minute news bulletins, club guides, press conference presentations and short form features. There is also an audio podcast. Speaking to executives involved, digital production is often treated like a miniaturised content operation, but with the final delivery taking different forms (e.g. encoding for use on multiple devices<sup>70</sup>). Premier League Productions also produces Premier League content for Yahoo UK, insofar as Yahoo's Internet rights in the UK allow. This includes highlights of 380 matches, 35 matchday previews, news segments and up to 6 specially produced features. The preference is for short form content packaged together under a clear theme.

#### **4.5.5 Distribution**

Delivering high volumes of content to multiple points is a key element of the service. Satellite delivery is the basis of Premier League Productions distribution operation; the large number of licensees and their global locations, taken in conjunction with the 3 year cycle of broadcasting rights, underpins the practicality of delivery by satellite.

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<sup>70</sup> For mobile use content must be encoded separately for each platform, for example, Apple iOS, Android and Blackberry.

Whilst some licensees may prefer file-based delivery, satellite systems remain the dominant method. As redundancy is a very costly insurance policy (redundancy is the back up route used to ensure delivery of content, particularly for live feeds for which expensive advertising may have been sold by the licensees), so PLP uses satellite distribution to offer 3 levels of service based on price, quality and technology. The tiers are distinguished by preference, from extra cautious triple redundancy through to no redundancy at all. The editorial content provided remains the same for 3 all packages.

### **Premier League Productions, a new level of commodification**

Measured against the BBC's 1992 edition of Match of The Day, the volume and scope of output now generated by Premier League Productions (PLP) from a single Premier League matchday (10 matches across a weekend) is worth considering.

PLP's core production offer includes 8 different editorial strands, from live match coverage through to studio-based programmes organised around analysis, discussion, previews and reviews. The offer also provides a further 5 special feed packages, with additional matches and enhancement options.

Scaling up, the full content service delivers a further 11 variations on output available on a channel that runs 24 hours a day, 7 days of the week for 42 weeks of the year. On top of this, archive-based content and digital production deliver another 4 strands of programming each.

This remarkable volume - a minimum of *32 different formats* scheduled across 168 hours of broadcasting - is derived from the coverage of 10 Premier League matches across a weekend, this is a little over 900 minutes<sup>71</sup> of football action. Or, for every single minute of on-the-field Premier League action, Premier League Productions generates over *11 minutes of on-screen content* - a multiplication factor of 11x1. This increased output is made possible by digital technology and fully integrated production workflows.

When researchers describe a continuous expansion in the way in which television can be distributed (Doyle, 2002), look at how the commodification process has intensified with ever more specific programmes for increasingly well-defined audiences (Mosco, 1996), or how commodification is bound up in the processes of economic production and distribution (Mason, 1999) then the example of how technology has transformed the production (supply) of Premier League content is particularly revealing.

## **Conclusion**

Chapter 4 considered the different ways that technology has radically transformed transmission and sports television production workflows.

In transmission, and against a background of changing expectations, manual videotape-based methods were replaced by automated systems utilising powerful media servers and software that was capable of

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<sup>71</sup> Even with an average of 4 minutes added to the end of each game, the total only reaches 940 minutes.

scheduling and transmitting multiple channels to numerous territories and time zones at the same time. However, the transition to a fully digital and tape-free workflow in transmission was not straightforward. It was delayed due to the reliability of Digital Betacam videotape and a lack of standardised encoding standards for file-based delivery systems. In 2014, this lack of standards remains problematic in transmission.

With the arrival of Sky Sports *live* coverage rapidly became the predominant style of sports broadcasting, rising to similar levels of importance found in the US. Aggressive channel marketing was also introduced. Working within the existing analogue paradigm Sky Sports escalated the amount of technology deployed for coverage. Adopting several overtly US methods Sky Sports extended Roone Arledge's philosophy of close up and personal coverage.

The arrival of digital production technology, with new workflows and faster ways of working, dovetailed perfectly into the sports television environment. It totally transformed potential output. Large volumes of media could be quickly transferred between locations but what was most revolutionary was the capacity to allow simultaneous access by numerous clients to the same original material.

Since 1992 there have been two important phases for sport production: (1) between 1994 and 2004 key non-linear editing and tapeless media technology was rolled out; introduced to production workflows this enabled a much greater volume and scope of sports content to be produced than ever before, and; (2) from 2004 onwards sports federations, including the

Premier League, were able to harness the potential of new technology and workflows to produce, under their own control, a guaranteed standard or global output that closely aligned with their own brand values.

In a new case study the Premier League's production arm, Premier League Productions, was unpacked and contemporary workflows and output examined, including the ways that *a single minute* of live football action is transformed into *11 minutes* of general programming for worldwide consumption via a dedicated Premier League channel. Representing a new level of intensity in the commodification process, PLP output has come a very long way from the BBC's 1992 Match of The Day operation.

The chapter also addressed a scarcity of literature on television sports production; including the question of how vastly increased demand for sports content has been met. Consequently, the chapter was oriented towards the supply side rather than the demand side interpretation favoured by political economy critiques. In many instances developments in technology, including new distribution platforms and means of producing content, are expressed as new broadcasting rights are issued. As many important broadcasting rights are issued every three years then the technological paradigm is, in a sense, only updated a full cycle of rights behind technological developments.

The role of broadcasting rights, as the second of three influential pre-production factors, is discussed in chapter 5.

## 5 | Sports broadcasting rights

If chapter 4 was concerned with fast-moving developments in technology including the creation of more platforms and accelerated means of producing ever more content, then turning to a discussion of broadcasting rights means, more or less, hitting the brakes; rights are very often about what you *cannot* do as a broadcaster or producer.

Competition between broadcasters to acquire the most appealing sports broadcasting rights is extremely intense. Political economists argue that understanding why live sports coverage is so important to contemporary global media requires knowledge of how the power relations between sports authorities and broadcasters have changed over time. A strong expression of how the balance of power has shifted is seen in the process of issuing broadcasting rights. As Haynes (2005) points out:

What is at stake is the ability of specific sports to drive uptake of new media technologies and pay-TV services. Sport, more than any other form of media content, has been used as a weapon to break into new markets, undermine competitors and ultimately dominate certain sectors of the media industry. (Haynes, 2005:6)

Evens, Iosifidis and Smith (2013:10) add: "... the marketisation of the television industry had fundamental implications for the selling and exploitation of sports broadcasting rights". However, the story of rights is incomplete as it tends to be told with most emphasis on the demand side. Contracts for sports broadcasting rights have another, less understood

dimension: the addition of increasingly detailed prescriptions from federations including UEFA, FIFA and the IOC about how sports content should be shown on screen. This trend merits examination. As Drahos and Braithwaite (2002:4) note, such activity represents a “quiet accretion of restrictions...” and is often hidden from the public gaze. Discussion of how increasingly prescriptive controls are added to broadcasting rights is very scarce, so this chapter aims to address this gap.

Without advocating technological determinism, this research argues that broadcasting rights often reflect important aspects of technological change. Chapter 4 reviewed the ways new technology and workflows combined to reshape the content supply side and meet escalating demand for sports content. Whilst reflecting economic and business imperatives, broadcasting rights are frequently linked to technology via new distribution platforms and means of producing content.

Following intervention by competition authorities in the UK and Europe, broadcasting rights to the most popular sports events are typically tendered every three years; the majority of expert contributors interviewed thought broadcasting rights operated one cycle [of rights] behind technology. The pattern that emerges is of ever more specific rights being issued. This involves the unbundling of what were once more generic broadcasting rights, to be replaced with discrete categories identifying more rights, platforms, markets and territories that command further fees, for example the introduction of overseas, Internet and mobile rights. Chapter 5 focuses on sports broadcasting rights.

There are 2 dimensions to consider, (a) the ways sports broadcasting rights impact on broadcasters and (b) how the subsequent rights contracts can go a long way to determining production output – in other words, how these contracts increasingly tell producers what to do. Again, political economy discussion has had a lot to say about the wider impact on broadcasters and the ownership of rights but has had a lot less to say about the supply side, about how broadcasting rights influence the final output that we see on television. Speaking in 2013, a widely respected sports television executive summarises:

In terms of limiting creativity, *prescriptive* is the right word for these contracts... Is there more and more prescription in terms of what you are allowed to do and less and less input from producers? Yes. That's the case". (Executive producer, independent sport production, 2013)

Haynes (2005) recognises this is a story of:

... the increasing use of intellectual property rights in the everyday activities of media organisations and how they have become the most important assets in media markets. (Haynes, 2005:12)

The chapter opens with some basic questions before looking in more detail at the composition of broadcasting rights. Since the mid-1990s a large part of my work as an executive producer has been responding to Requests for Production (RFP) or Invitations to Tender (ITT) that follow successful rights acquisitions; this specialist experience is used in the research. As before, new field notes as a participant-observer are used to support testimony from leading production experts. Two further methods are also adopted:

short form interviews, these deal with more specific topics (many of which arose off the back of work situations). These quick-fire interviews appear to suit producers' willingness to respond and were often more informative than longer interviews. When approaching more sensitive areas – such as the application of the UEFA Production Manual – testimony is backed up with reference to the Manual itself. It is telling that contributors were much more reluctant to comment in interviews when the influence of federations was scrutinised, even though the contributions were anonymous. As with the Premier League case study in chapter 4, the introduction of highly prescriptive production manuals is new terrain that has received little academic scrutiny.

### **5.1 What is intellectual property and what is it for?**

Gratton and Solberg (2007:146) argue that sports broadcasting rights serve the same purpose as copyrights do for books, films and music. However, historically there has not been any clear understanding of copyrights of sporting events. Evens, Iosifidis and Smith (2013:88), following Szymanski (2009), provide a useful summary of claims to rights ownership. As sports broadcasting rights are a form of intellectual property, my position is that ownership resides with the leagues and federations that provide the competitive context.

The ultimate structure of intellectual property regulations, such as copyright, has its roots in political philosophy; John Locke created a political philosophy of property in the 17<sup>th</sup> Century. All patents, trademarks, design rights and rights in databases are based on intangible property rights; an

example of something tangible might include a plot of land. Consequently, intellectual property rights are based on an abstract object. The WTO (2004) suggests that intellectual property rights are given to people over the creation of the mind. However, rights are only extended to fixed, original and creative expressions, in other words any ideas need to be written down, as the ideas themselves are not protected. The initial idea to form a breakaway league of football clubs in England would not be protected, but the proposed new league's title (The Premier League), its constitution, playing structure, schedule of matches and other operating parameters, could be identified, set down and, at that point, would be protected. In copyright law this is known as the idea/expression dichotomy and is a source of confusion. As Haynes (2005) notes:

Unlike tangible property, which may have clear lines of demarcation, intellectual property knows no bounds... Policing and protection of the copying, use and exploitation of IP rights is therefore a key mechanism for society – largely led by business interests – to demarcate who owns what. (Haynes, 2005:14)

Once you own an intellectual property, the next step is to attach a value. The original owner holds various rights to copy until they are assigned to someone else, either by being sold or licensed. The bundle of rights that can, according to Haynes (2005:17), be assigned includes reproduction, derivative works adaptation or translation, broadcast, and public performance. These are the *primary* rights. *Secondary* rights protect against secondary infringement of copyright and include unauthorised distribution and exploitation of copied, importation, rent for hire, exhibiting for public trade, and selling. For example, a UK broadcaster may have the right to

show Premier League football, but these primary rights would not allow the broadcaster to sell their coverage on to a third party, a foreign broadcaster, as this would require a secondary rights deal. In the initial (1992) Premier League broadcasting rights deal BSkyB added £30 million for the overseas rights (Horsman, 1997). For the period 2013-16 broadcasting rights for Premier League overseas sales were worth close to £2 billion (Harris, 2012), unsurprisingly the Premier League actively protects its intellectual property rights. Utilitarian, market-driven principles of copyright (as they are interpreted by contemporary global media companies) have increasingly become the *de facto* understanding of how media rights are valued, organised and distributed. This suggests that much of copyright law is arbitrary and is designed on behalf of powerful interests.

## **5.2 How has copyright law developed and how it is connected to the market?**

Whilst media markets have expanded globally (as has their protection under intellectual property law) there is no such thing as a homogenised international copyright and individual nation states therefore have their own histories of copyright legislation. Numerous international agreements<sup>72</sup> have attempted to iron out disparities and divergences around the world. Where the World Intellectual Property Organisation (WIPO) acts as a secretariat for global intellectual property conventions, the World Trade Organisation (WTO) carries powerful economic remedies and sanctions over nations that fail to meet the minimum standards for Trade Related Intellectual Property Rights (TRIPS). As Herman and McChesney note (1997:51), "along with

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<sup>72</sup> 100 nations signed the Berne Convention in 1886, the Universal Copyright Convention was agreed under UNESCO in 1952, the World Intellectual Property Organisation (WIPO) was founded under the United Nations in 1967 and, under the Final Act (1994) of the Uruguay Round of GATT, TRIPS, Trade Related Property Rights, was formed (Haynes, 2005:22).

pharmaceuticals, media and computer software copyright are the primary topics for global intellectual property rights negotiations.”

Considering intellectual property, three factors stand out:

- 1) Individual states sanction and regulate rules by which intellectual property rights operate; regulations vary from country to country.
- 2) The growth in importance of intellectual property rights (including their definition and control) has been heavily influenced by the organisations that have promoted the virtues of free trade and non-interference of governments, in other words WTO, GATT and NAFTA and the EC.
- 3) IP Rights are invariably vested in large transnational corporations whose economic power often translates into political and cultural power. Recent trends in IP rights are often concerned with what *cannot* be done and this, as Haynes (2005:10) notes, means IP rights are used to “actually inhibit innovation and creativity”.

Haynes (2005:13) continues to argue that intellectual property rights serve the interests of transnational corporations and the global business elite. Why such intellectual property rights exist in their present form, and what they protect, reveals how their meaning and function are changing to benefit the few (owners) over the wider (public) interest (this also appears to be linked to the transformation of citizens into consumers). Sports broadcasting rights were, for Rupert Murdoch and News Corporation, a battering ram forcing entry into new markets following the deregulation (in the UK, the 1990 Broadcasting Act). The goal was to dominate global TV sport rights ownership. It has proved a successful technique in the UK with

BSkyB's coverage of Premier League and in the US with Fox's presentation of the NFL.

Linked to media regulation, international treaties governed by the World Intellectual Property Organisation (WIPO) and the World Trade Organisation (WTO) have influenced developments in copyright that are manifested in directives by the European Union, adopted by the UK in 2003<sup>73</sup> in what might be loosely termed as a trickle down effect of policy from a global to a national context. This brief discussion demonstrates that the world of intellectual property is often confusing and there is little evidence that it is getting any easier to understand. Two further factors add complication: (a) the Internet, the ease with which material can be copied and exchanged threatens the copyright control of global media providers, and; (b) the way encryption on digital delivery systems has been used to lock out users<sup>74</sup>. This is known as the copyright grab whereby copy-circumvention and access-circumvention have been bundled together in digital rights management technology to limit fair use. Copyright law does not have any bearing in access provisions, so this debate will continue.

### **5.3 Sports broadcasting rights, changing values and definitions**

As Szymanski (2006:149) points out, the television industry consists of a set of vertically related markets. "The nature of competition at each stage

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<sup>73</sup> Copyright Designs and Patents Act (1988) and the Copyright Related Rights Regulations (2003)

<sup>74</sup> When BSkyB acquired exclusive live broadcasting rights to the Premier League in 1992, the argument over the benefit of wider public access – football as a 'public good' – was voiced, as football became a 'private good' hidden behind a pay wall.

of the television industry, like any other, is determined by the nature of technology.”

The first sign that the long-running arrangement between the BBC and ITV (that suppressed the value of sports broadcasting rights) was ending came in 1979 when LWT bid £5 million for exclusive rights to show league football. The press dubbed the attempted highjack of the BBC’s flagship show, Match of The Day, as “snatch of the day”. As described in chapter 3, it was in 1988, with broadcasting deregulation on the horizon, that the cost of domestic UK broadcasting rights to football began to escalate with ITV bidding £44 million for 18 matches per season for 4 seasons. As Gratton and Solberg (2007:5) summarise, in 1992 BSkyB raised ITV’s 1988 offer by 250% and, when the rights were renegotiated in 1997, tabled a further 337% rise in rights fees. Economically, the ownership of Premier League rights remains central to BSkyB strategy.

### **Valuing and Auctioning Broadcasting Rights**

How do broadcasters evaluate their bids for sports broadcasting rights?

Gratton and Solberg (2007) note that sports programming:

... almost uniquely has this ability to attract the size and characteristics of audiences most attractive to distributors, sponsors and advertisers. These audiences were also willing to pay a premium price to broadcasters to receive more of the sports content than had previously been supplied by the old free-to-air channels. (Gratton and Solberg, 2007:10)

However, Gerrard (2006:31) argues that, "sports media and image rights are intangible assets and invariably there are severe valuation problems"<sup>75</sup>.

Among the drivers that shape sports broadcasting rights values are:

- a) The size and purchasing power of the population in the viewing market
- b) The popularity of the sport among the general audience
- c) The quality of the tournament, playing talent, uncertainty of outcome and contest significance
- d) The type of media coverage offered
- e) The level of competition on the demand side

Haynes (2005) also points out that:

Sport is ready made for television. Its use by television adds an important dimension to media rights, because how we value sport in society has a direct effect on the licensing, acquisition, distribution and ultimate consumption of sport. (Haynes, 2005:67)

A very high barrier of confidentiality, legal process and regulatory requirements surrounds the auctioning of broadcast rights by sports such as the Premier League. Detailed information on rights, on the valuation and submission of bids and of the subsequent contracts issued are fiercely guarded.

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<sup>75</sup> Gerrard (2006) notes the methods used to value rights, like discounted cash flow analysis (DCF), and points out various shortcomings.

## **Premier League UK Broadcasting Rights**

Working with specialist media, business and commercial, legal and regulatory advisors leagues and federations define the broadcasting rights to their events by considering:

- 1) The *range* of programme packages offered, from live coverage, delayed presentation, highlights and clip rights including availability (broadcast times) for each package.
- 2) The *distribution* platform, including digital satellite and cable (usually pay-TV), terrestrial broadcast (free-to-air), Internet streaming and mobile. This may include further definitions such as anytime and anywhere options defined by platform.
- 3) The *broadcast territory*, usually defined as domestic (UK) or overseas (in the case of the Premier league this becomes 212 different territories)
- 4) The *period of the license*, this is now typically 3 years but varies, most obviously with quadrennial events including the Olympics and World Cup Finals.

Leagues, federations and their advisors consider all areas that can be exploited by the sale of their rights. Domestic rights have been the most valuable, but overseas rights have risen dramatically in recent years. Revenue from Internet and mobile rights remains modest. Live audio-visual UK broadcasting rights to the Premier League have, since 2001, been sold in three year/season licenses. The number of matches offered for live broadcast has increased from 60 (1992-97) to 154 (2013-16).

Looking at the 2013-16 rights<sup>76</sup>, 154 matches were offered by the Premier League. Correlating several sources<sup>77</sup> shows 7 packages structured A to G, with each package distinguished by the time at which matches are broadcast.

Figure 5.1, PL Broadcasting Rights Values 2013-2016

| Pack* | Purchaser | Matches   | Picks **          | Cost     | Cost per match |
|-------|-----------|---|-------------------|----------|----------------|
| A     | BT        | Sat 12.45                                       | 13x1 & 13x4       | £534m    | £6.85m         |
| B     | BSkyB     | Sat 17.30<br>(Some Sunday 13.30 <sup>78</sup> ) | 22x3 & 4x5        | £465m    | £5.96m         |
| C     | BSkyB     | Sun 13.30                                       | 13x2 & 13x3       | £495m    | £6.35m         |
| D     | BSkyB     | Sun 16.00                                       | 20x1 & 6x4        | £642m    | £8.23m         |
| E     | BSkyB     | Mon 20.00<br>(Some on Sun 16.00)                | 12x2 & 10x4 & 4x5 | £480m    | £6.65m         |
| F     | BSkyB     | Sat 17.30                                       | 8x2 & 4x4         | £196m    | £5.5m          |
| G     | BT        | 2 x Sat 12.45<br>Plus midweek evening 17.45     | 5x1 & 5x2 & 2x5   | £204m    | £5.67m         |
|       |           |   |                   | £3.018bn |                |

\* Packs A through E offer 26 matches per pack, F and G just 12 matches per pack = 154 matches

\*\* There are 5 rounds of match picks; this indicates which broadcaster has the right to choose preferred matches and when. For example, for 1<sup>st</sup> round match picks BSkyB has 20 picks and BT has 18.

Breaking down the 2013-16 UK domestic rights as issued:

<sup>76</sup> Accessing the Premier League's official website in October 2013 – <http://www.premierleague.com/en-gb/fans/faqs/how-does-the-premier-league-sell-its-tv-rights.html> - describes its broadcasting rights as being sold in 6 packages of 23 matches and, due to EU regulation, that no single broadcaster is allowed to purchase all 6 packages. This was the model for 2010-13 and 138 matches and not for 154 matches in 2013-16.

<sup>77</sup> Sources include the Premier League, BSkyB, BT and newspapers including the Guardian, Telegraph and Daily Mail and specialist sports industry journals.

<sup>78</sup> Games for clubs involved in playing in the Europa League on a Thursday night are frequently re-scheduled from Saturday to Sunday lunchtime kick offs.

- BSkyB purchased 5 packages, comprising 116 matches for a total of £2.28 billion in rights fees
- BT Sport purchased 2 packages, comprising 38 matches for £738 million

The Premier League sells the broadcasting rights of all member clubs on a collective basis (see chapter 2). Revenue from domestic rights sales is divided on a 50:25:25 basis; 50% is shared equally between all 20 clubs: 25% is awarded on a merit basis determined by each club's final league position and the final 25% is distributed as a facilities fee for the matches involving any club shown live on television. In other words, a highly placed club with more live television appearances receives more revenue than a club finishing at the foot of the table with fewer appearances. For 2013-16 the championship-winning club is expected to earn close to £100 million in broadcast earnings each season, while the bottom club can expect £63 million (Ziegler, 2013). Additional revenue, the income generated from selling Premier League broadcasting rights overseas – approximately £2 billion for 2013-16 – is divided equally between the 20 premier league clubs. Figure 5.2 demonstrates the average cost paid per match for domestic UK broadcasting rights has escalated from around £630,000 to £6.53 million. This represents a ten-fold increase in rights fees since 1992.

Figures 5.1 and 5.2 cross-reference various sources, where estimated costs vary a close approximate value is shown. In figure 5.2 the overseas rights are an additional revenue source (except for the entry in 1992-97 which is extrapolated from the figure for overseas rights that was added to BSkyB's final offer).

Figure 5.2, Rising PL Broadcasting Rights Values

| <b>Period</b> | <b>Duration</b> | <b>Domestic UK£</b> | <b>Purchaser</b>                             | <b>+ Overseas UK£</b> |
|---------------|-----------------|---------------------|--|-----------------------|
| 1992-1997     | 5 years         | £304m               | BSkyB   60 matches                           | £30m                  |
| 1997-2001     | 4 years         | £743m               | BSkyB   60 matches                           | £98m                  |
| 2001-2004     | 3 years         | £1.2bn              | BSkyB   106 matches                          | £178m                 |
| 2004-2007     | 3 years         | £1.024bn            | BSkyB   138 matches                          | £325m                 |
| 2007-2010     | 3 years         | £1.706bn            | BSkyB   92 matches<br>Setanta   46 matches   | £625m                 |
| 2010-2013     | 3 years         | £1.78bn             | BSkyB   115 matches<br>ESPN   23 matches     | £1.4bn                |
| 2013-2016     | 3 years         | £3.018bn            | BSkyB   116 matches<br>BT Sport   38 matches | ≥ £2bn                |

From 2001-04, 3 packages of rights were offered and rights were issued every three years. BSkyB won the majority of matches, NTL secured pay-per-view rights and ITV won highlights rights. As NTL could not afford its offer it withdrew its bid.

For 2004-07, 4 packages were auctioned and BSkyB won all 4. Pressure from the EU Competition Commission saw BSkyB attempt to sublicense 8 games but the agreed reserve price was not met and rights reverted to BSkyB.

EU pressure paved the way for the 2007-10 license when 6 packages were offered, with no single bidder being able to secure all 6 (European Commission, 2005). This allowed Setanta to become the first broadcaster other than BSkyB to broadcast live Premier League matches. BSkyB's domination was ended by the EU Competition Commission, rather than via free market competition.

In terms of further revenue for UK-based rights, the BBC paid £105m (2004-07), £172m (2007-10) and £173m (2013-16) to secure highlights rights for Match of The Day. From 2007, additional costs were raised for the rights to show delayed coverage - the Sky Sports match broadcast in full at 20.00 on a Saturday night, followed by 50 minute highlights of each BSkyB game at 22.15. UK Internet and mobile rights have been added recently, as an ex-Sky Sports executive speaking in 2013 confirmed, "It was only 6 years ago [2007] that mobile broadcasting rights appeared for the first time."

Reviewing the growth of the Premier League's domestic broadcasting rights, the explosion in value of rights licensed for top-flight football in the UK is not unique. It can be argued that the increases for Premier League broadcasting rights echoed the dramatic increases in rights fees paid for NFL coverage in the USA in the 1970s and 1980s (see chapter 3). Since the 1960s it has been the NFL that has set the benchmark for broadcasting rights income<sup>79</sup>. It can also be noted that the success of the Premier League, as a rival set up to challenge the incumbent Football League, was not guaranteed as, historically, in professional sports the single dominant league always prevails, Fort (2006:150). The risk involved in the newly formed BSkyB-Premier League axis is often overlooked.

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<sup>79</sup> The NFL was the first governing body to pitch itself as an entertainment, with ABC's Monday Night Football becoming an American broadcasting institution. The way in which the NFL rotated rights packages between competing broadcasters was the envy of sports authorities around the world.

## Overseas broadcasting rights

Chapter 3 noted the NBA was actively engaged in building overseas rights values in the 1990s. The NBA borrowed heavily from advertising and branding cultures to create a global phenomenon around televised basketball and its leading player, Michael Jordan<sup>80</sup>. Securing significant revenue from overseas rights sales was not entirely new and NBA activities were well known to the Premier League<sup>81</sup>. As shown in figure 5.3 the revenues raised by the Premier League for its overseas distribution shows growth that roughly doubles with each period of rights:

Figure 5.3, Overseas revenue for Premier League rights

|           |                |
|-----------|----------------|
| 1992-1997 | £30 million    |
| 1997-2001 | £98 million    |
| 2001-2004 | £178 million   |
| 2004-2007 | £325 million   |
| 2007-2010 | £625 million   |
| 2010-2013 | £1.2 billion   |
| 2013-2016 | ≥ UK£2 billion |

Recalling Fort (2006:53) and how earnings from broadcasting rights have altered the revenue side of sport forever, for 2013-16 the Premier League anticipates total rights revenues to reach £5.5 billion (Harris, 2012). But where does the escalating cost of rights leave broadcasters?

<sup>80</sup> The role of sports goods manufacturers like adidas and Nike should be considered. Smit (2006) explains the role Horst Dassler in the emergence of the Olympic Games and the FIFA World Cup, as ISL controlled early television and marketing rights. In golf and tennis Mark McCormack and IMG/TWI also had a leading role in generating rights and promoting players.

<sup>81</sup> In 1996, then chief executive of the Premier League Rick Parry was introduced to the NBA by Chrysalis Sport and subsequently visited the NBA in New York to review production operations. I was executive producer of NBA on Channel Four for Chrysalis.

## **Escalating costs**

Reasons for the escalation in the value of broadcasting rights include:

- a) The supply of broadcasting rights to elite sports is less than the demand from broadcasters. The number of competing media providers increased substantially from 1992, whilst the number of attractive sports events has remained relatively fixed.
- b) Live sports programmes are perishable goods they cannot be stored without losing most of their value. The high degree of time sensitivity of sport represents a major difference from other entertainment products.
- c) Similarly, exclusivity is particularly important as rights lose value once there is no longer uncertainty over the result. However, exclusive delayed broadcast rights and highlights rights do retain some value.
- d) The many ways sports coverage can be used on television, including live coverage, highlights programmes, rolling news bulletins, previews and promotions and nostalgia programmes featuring archive content, adds an important dimension to broadcasting rights. As revealed in chapter 4, Premier League Productions produces 11 minutes of content for every single minute of football played on the pitch.
- e) The ways sports coverage can be adapted for distribution on alternative platforms, such as Internet streaming and mobile consumption is becoming more significant culturally but is not yet financially rewarding.
- f) In a fragmented broadcasting landscape, live coverage of major sports events continues to attract very large audiences (including

audience demographics that strongly appeal to advertisers and sponsors).

- g) Sport is one of the few programme genres that television audiences have demonstrated they are prepared to pay to watch.
- h) There is a lack of viable substitutes for live sports coverage.
- i) However, sport does have a finite value as the crash of ITV Digital<sup>82</sup>, and the failure of Premier League rights holders Setanta and, to a lesser extent, ESPN all demonstrate.

### **Broadcasting rights, the buyer's perspective**

Jeanrenaud and Kesenne (2006) argue the amount broadcasters are willing to pay for premium sports rights cannot solely be explained by what they are able to earn from subscription fees, sponsorship and advertising revenues.

By showing the most popular sports, broadcasters expect to benefit in terms of better image and identity, a stronger market position and a sustained increase in viewers.

(Jeanrenaud and Kesenne, 2006:2).

The most prestigious events are the live global mega-events such as the IOC Olympics and the FIFA World Cup Finals. These marquee events provide a broadcaster with a degree of prominence that has value; in the UK, the BBC gains status as the Olympics broadcaster and, in the USA, NBC's long-term association with the Olympics provides a similar benefit. But there are several issues with such rights: (1) rights to these global

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<sup>82</sup> The 2002 crash was a result of massive over-valuation of the rights to Football League coverage by On Digital, later re-branded as ITV Digital.

events are first purchased by competing sports rights agencies, for example Infront (formerly the Kirch Group), Sportfive and TEAM Marketing before being marketed to national broadcasters territory by territory. (2) The Olympic Games and World Cup Finals are staged every four years<sup>83</sup> and, (3) audience ratings are often determined by the performance of national athletes or, for the World Cup, the national team; when local interest is eliminated, then viewing figures tend to diminish and the value of advertising slots decrease.

As broadcasters seek to build their audiences, it is the ability of national leagues and federation-based competitions to offer popular, talent-led, high-quality sports contests, with matches played week in and week out, across a well-defined schedule that are the most highly valued and subsequently attract the highest rights fees. BSkyB has consistently used first mover strategy to secure important rights. Sky Sports MD, Barney Francis maintains: "The Premier League has never been more popular with our customers" (Premierleague.com, 2012). Football continues to be used to drive take up of new services, for example Sky Go.

In comparison to league football, the value of Formula 1 Grand Prix rights is less due to the varying start times of races; races are not held every week and frequently involve significant time shifts due to the different international time zones in a Formula 1 season. The relative uncertainty of when F1 races will be available to broadcast is slightly less appealing to audiences, advertisers and sponsors.

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<sup>83</sup> In 1992 the IOC split the summer and winter Olympics and placed them 2 years apart to minimize the time the Games are 'off the television screen'.

Illustrating this point, by March 1998 the BBC had lost all its football coverage, including Match of The Day and was looking for another flagship sport. UEFA Champions League coverage was ruled out, as the BBC could not broadcast the embedded sponsorship. Meanwhile, at ITV, executives were keen to placate their advertisers by opting out of their contract to show Formula 1 and secure UEFA Champions League coverage. The appeal of regular mid-week prime time slots provided by elite European football outweighed the confusing schedule of F1 races. What was surprising was ITV was happy to openly admit this (Gibson, 2008). The BBC stepped in to secure F1 coverage. As Haynes (2005:68) argues, "Sports rights can be, and usually are, the flagship and distinguishing factor of a television station's brand identity, and are lost at their peril". In the case of the BBC, its inability to monetise the most expensive rights, via subscriptions, sponsorship or advertising is an economic disadvantage that is increasingly hard to overcome in a competitive market.

Moving away from elite sports, broadcasting rights for more localised or less popular sports can still provide value. Broadcasters can acquire advertising-funded coverage of some niche sports free of charge.

Figure 5.4, Illustrative Categories of Sports Rights

|                                     |  |
|-------------------------------------|--|
| Global Mega Events                  | IOC Summer Olympic Games<br>FIFA World Cup Finals<br>IOC Winter Olympic Games  |
| Global Events with secondary appeal | Various World Championships (e.g. IAAF athletics, swimming, gymnastics, rowing, sailing and so on)<br>Rugby World Cup Finals<br>Cricket World Cup Finals<br>Paralympics, Summer and Winter |

|   |  |
|---|--|
| Regional Events with significant global appeal  | <p>The EURO Championships</p> <p>Copa America (South American national championships)</p> <p>NFL SuperBowl &amp; AFC/NFC Conference Finals</p> <p>UEFA Champions League</p> <p>EUROPA League</p> <p>Formula 1 Grand Prix</p> <p>Moto GP (motorcycle racing)</p> <p>USPG and ETP men's professional Golf circuits</p> <p>ATP Tennis Tour</p> <p>6 Nations Rugby Union</p> |
| Regional Events, with less widespread appeal  | <p>World Rally Championships</p> <p>Federation-based football tournaments, national and club-level – e.g. Libertadores Cup</p> <p>Asian Games</p> <p>Commonwealth Games</p> <p>Heineken European Cup (Rugby Union)</p> <p>Southern hemisphere international rugby tournaments</p>  |
| National Leagues & competitions with significant global appeal and that provide regular season-long schedules | <p>Premier League (UK)</p> <p>FA Cup (UK)</p> <p>La Liga (Spain)</p> <p>Serie a (Italy)</p> <p>Bundesliga (Germany)</p> <p>NFL (USA)</p> <p>NBA (USA)</p>  |
| National leagues & competitions with less global appeal   | <p>Horse racing – both flat and hurdles seasons</p> <p>League-based rugby union</p> <p>Super League – rugby league</p> <p>County cricket</p> <p>Major League Baseball</p> <p>Major League Hockey</p>   |
| Highlights-based content  | <p>MoTD (BBC PL football highlights magazine)</p> <p>BBC The Football League Show (Highlights)</p> <p>Recycled sports preview/review programmes (e.g. Goals on Sunday, Sky Sports)</p> <p>Assorted magazine programmes made by both broadcasters and federations (e.g. FIFA Futbol</p>   |

|                       |  |
|-----------------------|--|
| Cont./                | Mundial Football, UEFA Champions League Magazine) and independent magazines, such as TransWorld Sport                |
| Special cases         | Rolling sports news (e.g. Sky Sports News)   |
| Sponsored content     | Many niche and extreme sports are funded by brands and/or sponsors and aired for free, e.g. Channel Four Freesports. |
| Archive-based content | Recycled nostalgia-based programmes  |
| Sports Entertainment  | Trace Sports Stars, lifestyle-based content  |

These are illustrative categories set out by perceived value, by region and reach, rather than by the actual rights fees paid. Whilst subjective, this list demonstrates the difference between prominent sporting events that act like special offers attracting viewers to a broadcaster's schedule every four years and the regular menu of domestic leagues and federation-run competitions, with schedules that provide volume and quality across a well defined season, that run year after year, are proven to deliver viewers and appeal to advertisers and sponsors<sup>84</sup>.

In general terms, broadcasters engage with federations selling rights:

- 1) When a league or federation auctions its domestic broadcasting rights a confidential tender document is circulated to interested parties. (Occasionally interested parties are invited to request a tender document alongside a non-disclosure agreement to cover the tender process).
- 2) A deadline is set for broadcasters to submit first round sealed bids for the various rights they may wish to purchase.

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<sup>84</sup> Agencies like IMG and Sportfive are appointed to run Archive services for leagues and federations and manage one-off sales.

- 3) Once bids are received, broadcasters may be required to make a presentation to the league or federation.
- 4) In larger and more complicated tenders a second round of bids may be required, or a set of clarifications may be requested.
- 5) Usually there is a small window for exclusive negotiation between the leagues or federations and the preferred bidder.
- 6) The auction winners are announced subject to contract.

Rights auctions are a time-consuming and increasingly expensive process for bidders; costs cannot be recovered if a bid fails. As bids require specialist commercial, financial and legal input then costs quickly mount up. In 2012, BT Sport successfully bid for 2 Premier League packages (38 matches). Within sports television this success is credited to the additional input of Tony Ball, a former BSkyB chief executive who worked closely with Vic Wakeling at Sky Sports. Ball was hired by BT as a non-executive director and brought first-hand experience and strategic insight to the Premier League rights bidding process. BT Vision also called on Marc Watson, its own chief executive (Sweney, 2012). Previously Watson had been a director at the sports rights consultancy firm Reel Enterprises a long-standing advisor to the Premier League in rights negotiations. Adding detailed inside knowledge of processes and politics appears to be a critical component of successful rights bids.

### **Production services auctions**

When a broadcaster does secure broadcasting rights there may follow a further tender process, a Request for Production (RFP) or an Invitation to Tender (ITT). This is where a broadcaster, for a variety of reasons including

meeting regional production quotas, may wish to place the production with an independent producer to deliver the final content. These responses can also be expensive to produce, costs are seldom recovered and I have seen cases where the tender operator seeks to retain ownership of *any* ideas submitted<sup>85</sup>, even if the tender is not successful and no costs are paid. Whilst it might be argued that this is an abuse of market power I am not aware of any example where an independent production company has chosen to challenge.

Rights holding federations may also wish to tender directly with an independent production company for coverage and subsequent distribution of an event. In responding to tenders a trend I have noticed is for more legalistic terms to be used. As some of these events are relatively small, then production companies may take a view on whether a limited opportunity may lead to further, more lucrative, work in future. As federations adopt legal frameworks the situation is reminiscent of Harvey (2005:3) and the "significance of [extending] contractual relations in the marketplace".

### **Risk, the broadcasters' dilemma**

As fierce competition has propelled the value of broadcasting rights, the risks associated with acquiring expensive rights have also increased. Since 1992 only four companies have owned live broadcasting rights for the Premier League; two of these companies have failed. When Setanta lost one of the two packages (of 23 games each) it had acquired as a result of EU

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<sup>85</sup> RFPs increasingly include such clauses. In 2012 the IOC adopted this position when tendering for digital production services.

intervention, the company failed to meet its commercial targets and collapsed in June 2009 (Mason and Moore, 2009). Within a few weeks ESPN acquired Setanta's rights but was unable to hold onto these rights in 2012 due to intense competition from newcomer BT Sport. BT Sport began to broadcast in the 2013-14 season, so whether its expensive acquisition of 2 packages (totalling 38 games for £738 million) is successful remains to be seen, leaving BSkyB as the only company with a proven track record in monetising its ownership of domestic UK rights to live Premier League matches.

When considering sports broadcasting rights broadcasters' evaluation needs to account for the full costs incurred, from buying rights to delivering programmes to audiences. Solberg (2006:108) explains the cost structure of sports broadcasting:

- 1) Total costs = fixed costs + variable costs
- 2) Fixed costs = production related costs + sunk costs (usually including broadcasting rights fees and infrastructure costs)
- 3) Variable costs = variable costs of broadcasting + variable costs of production + opportunity costs

Solberg (2006) also notes the very different outcome from a contract that *obliges* the purchaser to broadcast a fixed number of games – the case with the Premier League – and a contract that *allows* a broadcaster to air up to (but not necessarily all of) the games offered. As BSkyB in particular has invested heavily in acquiring attractive football rights and in their broadcasting infrastructure, then there is a much higher degree of sunk costs. As Solberg (2006) continues, among other things this has allowed

sellers to dictate the contract terms leaving the broadcasters to carry the entire risk in the event of negative shifts in demand – of an audience switching off. Running a commercial sports broadcasting business, even when rights fees are discounted, is extremely expensive and represents a very high barrier to entry. Whilst not referring to the acquisition of expensive sports broadcasting rights, the element of risk implied in the term *casino capitalism* (Strange, 1986) seems an appropriate description. But, the right sport can deliver large numbers of viewers to broadcasters.

With the shift in market power away from broadcasters upstream to the leagues and federations (see chapter 2) there is another, largely unseen but significant trend: the detailed prescriptions that are increasingly written in to broadcasting rights and that frequently determine key aspects of production output and that remind us, again, of “a quiet accretion of restrictions...” (Drahos and Braithwaite, 2002:4)

## **5.4 Broadcasting rights and prescriptive practices, examples from Formula 1 and the UEFA Champions League**

### **Formula 1**

In 1995, ITV won the rights to broadcast live Formula 1 offering Formula One Management £60 million for four seasons from 1997. ITV retained the broadcasting rights until 2009. Following its acquisition, ITV tendered a Request for Production (RFP) to ITV Sport, IMG and a broadcaster-independent producer partnership of Meridian, Anglia and Chrysalis Television (MACH 1). Working at Chrysalis Television, I was lead author of

the successful MACH 1 response and was subsequently involved in setting up the coverage and monitoring output in further seasons.

Formula 1 was already known for draconian arrangements at its venues, for example *any* material shot at an F1 circuit belongs to F1 – copies of all material had to be submitted on a daily basis. However, the Formula 1 contract with ITV went further in prescribing what could and could not be done at any venue. This was in 1996-97 and, whilst I had encountered copyright issues when working on behalf of Channel Four with the NFL and NBA in the USA, this was the first time I had seen such extensive restrictions. Typical conditions determined:

- What material producers could record at any F1 venue
- Whether a studio position would be allowed at any venue
- Where any additional cameras could be placed on site, including a tight restriction on RF frequencies<sup>86</sup>
- When material could be recorded at the venue
- When the international feed *must* be used by a broadcaster
- Prescriptions on what could be done in and out of commercial breaks
- How additional material, like interviews with drivers that had left the race, may be incorporated within live coverage (the international feed)
- Who producers could have access to at the venue
- Where production (OB) vehicles could be parked
- What levels of credentials would be authorised and who could receive them

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<sup>86</sup> An RF camera uses radio frequencies to send material back to the Outside Broadcast truck.

- What supporting F1 Archive would be available and how this could be used
- The ownership of all material shot at the venue
- When the final programme material can be aired, or rebroadcast on other ITV channels

ITV was keen to make Formula 1 coverage as widely accessible as possible so the broadcaster could maximise the value of the broadcasting rights<sup>87</sup>.

The producers had to balance the stipulations set out by Formula 1 with ITV's commercial targets and audience requirements – the production team was stuck in the middle between the rights holders and broadcaster client.

A senior executive producer with many years experience of Formula 1 coverage at different broadcasters confirmed the issues remained much the same in 2013:

Formula 1 limits creative control massively. Bernie Ecclestone says: this is how we cover the start of the race, half way through lap 2 we will do 7 or 8 replays of the start. This is incredibly frustrating, because halfway through lap 2 we haven't really resolved where this and that driver are in the race yet. But the rules that have been laid down by Formula 1 are that halfway through lap 2 you *must* have these replays – it is incredibly frustrating. There is now much more of a set pattern in the way that a sport is covered as a result of the requirements of rights holders. Formula 1 is a good example. (Senior executive producer, independent sports production, 2013)

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<sup>87</sup> A particular concern for ITV was how to introduce commercial breaks to live race coverage. The inclusion of commercial breaks is standard practice around the world so it was of less concern to F1 than to UK audiences that had become used to uninterrupted coverage on the BBC.

Formula 1 was one of the first federations to actively seek a guaranteed quality of coverage across all its events - the Premier League later expressed a similar target for its own international output (see chapter 4). A highly experienced international sport director adds his perspective on the balance between offering safety or creativity in live coverage:

When you are directing a generic world feed to over 100 countries, it is more important to be a safe pair of hands as the premise is guaranteed uniform and stable coverage of the event. The coverage needs to be clean, so any client can jump in and out of the coverage where they need to. You might need more creativity when you are working for a single channel – a broadcaster – because you are then responsible for how the channel looks and feels, but you don't need this creativity for an international feed. (International live sports director, 2012)

My experience of Formula 1 tallies with the accounts of several specialist F1 producers and directors interviewed. What Formula 1 had found was this: as F1 broadcasting rights were sold to more broadcasters around the world: (a) the different emphasis placed on coverage by each national Grand Prix host broadcaster was becoming increasingly incongruous as they tended to focus on local stories, teams and drivers and; (b) with increased rights sales, more broadcasters wanted to be able to drop in and out of an international feed to which they could add their own unilateral material (customising presentation for their own audiences). Either way, F1 wanted more consistent and uniform coverage from race to race and across the entire season of races – the aim was to establish a recognised F1 brand. This was not just editorial it was also technical due to different recording

standards used around the world. However, the needs of an emerging, globalised audience had become more important than the domestic interests and idiosyncrasies of coverage from, say, the British, Italian or Brazilian Grand Prix.

To achieve greater consistency in race coverage Formula 1 provided its own host broadcast (international) feed. This feed starts 5 minutes prior to the start of the race lasting through to the post-race press conference. Formula 1 broadcasting rights agreements required *all* broadcasters to join this feed before the race.

Another reason for such prescriptions was to ensure that the coverage provided positive exposure for the key sponsors, whether it is those sponsoring the race, those with prominence around the circuit or a balance of car sponsors to be shown across a full race weekend.

Between 1996 and 2002 Formula 1 went a step further and provided its own coverage from a state-of-the-art production complex at each venue. Although this coverage was innovative, it was not a commercial success. Consequently, Formula 1 entered a 2 year joint-venture with BSkyB gaining access to the Sky platform where it offered a digital service for £12 per race. Whilst the service added a number of engaging editorial enhancements - including a lap counter, car-tracking graphics, on-screen rev counters, G-force indicators and more team radio feeds – commercial success remained elusive. However, a positive legacy of this service is how many of these editorial enhancements were subsequently adopted in the current international feed (Milmo, 2002).

## **Prescriptive coverage**

During interviews some producers, particularly those with more international experience, said they considered production standards around the globe had gradually improved since about 2000 – in particular, standards in Asia and China showed the greatest improvement. These producers considered this was a result of exposure to prescriptive coverage required by Formula 1, FIFA and the IOC. It was argued that, in a sense, these prescriptions offered a benchmark for international standards.

During the same interviews, the most prevalent view expressed was how producers considered their own creativity had been curtailed by the same increase in prescriptive conditions. These conditions were being added much further upstream, usually at the same time as broadcasting rights were assigned. In other words, long before producers became involved. A senior executive at an independent sports production company expressed concern about the future course of this trend:

Production creativity will be much more focussed around shoulder programming, those shows pre-kick off and post match, that's where producers will have input, once you go across to the stadium or race track coverage will be more prescriptive. (Senior manager, independent production, 2013)

An increase in prescriptive conditions marks a split between international coverage, increasingly provided by federations, and more localised presentation added by rights holding broadcasters. While Formula 1 was one of the earliest examples of a federation exercising control over the final

production output, a landmark case illustrating how prescriptions have become formalised is found with the UEFA Champions League.

### **UEFA Champions League**

Coverage of the UEFA Champions League (UCL) involves matches played at the same time at different locations across Europe<sup>88</sup>, so similar issues of consistency of coverage and the protection of brand values arise as with Formula 1. A head of programmes speaking in 2013 had a simple view of the issue: "German TV would use one wipe and Austrian TV another and ITV yet another and it wouldn't look like it is all part of the Champions League family." In my view the issues in play are more complex.

Sugden and Tomlinson (1998:93-97) note UEFA worked closely with TEAM Marketing AG, a company set up in 1991 to secure "the greatest monetary gain through marketing of television rights and sponsorship of the UEFA Champions League." This approach reflected models created for the 1984 Los Angeles Olympics and Patrick Nally's influential *InterSoccer* template discussed in chapter 3 (Nally, 1979).

For UEFA and TEAM Marketing the solution was to create the UEFA Champions League Production Manual. When a broadcaster acquires the rights to broadcast the UEFA Champions League it must abide by the rules set out in the Production Manual. It is telling that, when approaching the subject of federation control, many producers were reluctant to say anything critical, even when speaking with anonymity. As the focus is on

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<sup>88</sup> The UCL season comprises of 16 Matchdays, including the Final and the UEFA Super Cup. The matches, as a rule, begin at 20:45 Central European Time and are played on a Tuesday or Wednesday, with the Final played on a Saturday and the Super Cup on a Friday.

prescription, the following account refers directly to the UEFA Champions League Production Manual and UEFA website. Field notes as participant-observer are added to short testimony from those participants who were willing to speak. Analysis of UEFA's use of the Production Manual is a new contribution to research.

The UEFA Champions League Production Manual (UEFA, 2011) gets a little larger each season. The 2011-12 version contains 9 main sections and is nearly 150 pages long<sup>89</sup>. It opens with an overview of the competition, including the "triangle of mutual benefit"; the relationship between broadcasters, sponsors and football clubs that are "encircled within the control" of UEFA and TEAM Marketing. The Manual states:

UEFA controls and conducts the competition and co-ordinates the three partner groups.

Additionally, UEFA has appointed TEAM Marketing to secure financial support from the UCL

Partners and to facilitate the implementation of the concept on site. (UEFA, 2011:12)

This means UEFA provides sponsorship exposure that is *fully embedded* in the broadcast output and that every Champions League broadcast operation is supervised by TEAM Marketing representatives. UEFA's sponsors for the 2013-14 season include UniCredit, MasterCard, Ford, PlayStation, Gazprom, Heineken, adidas and htc. In addition to various credits in and out of commercial breaks during the prescribed coverage, these sponsors often buy additional commercial time in key markets around Champions League broadcasts; in the UK this would be on ITV or Sky Sports. UEFA expands on what it calls a "triangle of mutual benefit":

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<sup>89</sup> Production bibles are typically produced for drama and factual entertainment shows. By contrast to UEFA's 150 page manual, the bible for HBO's long running drama series *The Wire* was 79 pages (Martin, 2013)

To ensure the success of the competition everyone must benefit. The Clubs have the opportunity to play on the biggest stage and be financially rewarded for their contribution, whilst the UCL Partners, who provide the competition with worldwide exposure and substantial revenue, benefit from association with an outstanding competition.

UEFA/TEAM have pioneered a marketing approach, which ensures that funds raised go directly to the benefit of football. It is also a centralised marketing programme, which also produces clear benefits for Clubs, UCL Partners and spectators. The UCL offers Broadcasters football of the highest quality with the opportunity to broadcast up to 125 UEFA Champions League matches plus 20 Play-off matches, providing security of programming to a known calendar. (UEFA, 2011:12)

TEAM Marketing provides supervision ensuring rules are followed and the interests of the partners protected. Conformity is achieved through a combination of:

- a) Visits to each Club venue
- b) Meetings at each venue with the host broadcaster
- c) UEFA/TEAM Marketing assigns a coordinating producer to each club for as long as it remains in the tournament
- d) The rules and requirements as set out in the Production Manual.  
(These are explained directly to the host broadcast director by the TEAM producer)
- e) The host broadcaster is on site for two days for each Matchday (the schedule starts with news requirements on Matchday -1).
- f) UEFA has a group of quality control (QC) producers that check the final output; this group includes experienced sports directors.

The Manual is an impressive document, separate detailed guidelines include:

- Host Broadcast Operations
- TV Graphics
- Venue Operations
- Satellite Distribution
- Content Services
- Information Services
- FAME (Football Administration Management Environment, which handles all requests and bookings).

UEFA also insists: "The host broadcaster must use the latest generation of digital equipment on all productions." (UEFA, 2011:19.) Whilst a lot of the information in the Manual is highly technical<sup>90</sup>, there are two sections that are editorial; section three *Host Broadcast Operations* and section seven, *Content Services*.

Section seven, *Content Services* includes a wide range of approved content produced and distributed by UEFA to broadcasters, including individual city profiles, numerous Matchday promotional trailers and official graphics elements (titles, logos, backgrounds and animations). On Champions League Matchdays, UEFA provides Matchnight Highlights, an Instant Highlights feed (available quickly after the games have finished) and further content for mobile and Internet use. Beyond this offer, UEFA also produces

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<sup>90</sup> For example in requiring Host Broadcasters to provide unbroken recordings from camera 1 -the main coverage camera on the half way line - and a HDCAM tape copy of all EVS material.

a weekly 30-minute UEFA Champions League Magazine programme<sup>91</sup>. There is further access to isolated camera compilations (dramatic angles of match action), plus in-season archive and previous seasons archive. This offer is reminiscent of the approved content provided by Premier League Productions for the Premier League full service (see chapter 4).

*Host Broadcast Operations*, section three, contains what it calls “principles and match director guidelines” designed to make Champions League coverage as consistent as possible from host broadcaster to host broadcaster:

The key principle for match directors is to remember they are providing coverage for the multilateral feed so it should be unbiased and aimed at satisfying the viewing preferences of a global audience and not just a specific domestic market. (UEFA, 2011:27).

This is the same guaranteed uniform and stable coverage sought by Formula 1 and the international output of Premier League Productions.

Section three continues to set out host broadcast camera positions and the numerous multilateral content production running orders, in other words the editorial content of the multilateral international feed to be offered by each host broadcaster. Typically Sky Sports or ITV will take the multi-lateral feed and insert their own unilateral coverage. The unilateral coverage includes any studio discussion and analysis, pitchside presentation and interviews. The broadcast output we finally see jumps between the multilateral coverage (global) and unilateral injects (local customisation). UEFA’s reasoning is:

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<sup>91</sup> From the 2012-13 Season this production was sub-contracted to IMG Sports Media.

The multilateral running order (MRO) has been designed to ensure consistency between matches and to inform Broadcasters what coverage to expect during non-playing periods so that they can plan their unilateral productions accordingly. The MRO has been formulated for the following periods: Pre-match, half time, post-match, extra-time and penalties.

(UEFA, 2011:44)

All key aspects of Champions League match coverage, from camera placement, replay philosophy, and programme graphics are specified, including minute-by-minute running orders that start at 19.35 (CET) and run through to post-match and to off-air at full-time +6:50 minutes. With as many as 8 matches per evening, the Champions League is an impressive logistical operation with all matches kicking off at the same time.

Illustrating the extent to which conformity is sought, a typical pre-match multilateral running order (MRO) is set out in figure 5.5.

Figure 5.5, Illustrative MRO for UCL Pre-Match

| Start (CET) | End (CET) | Dur.  | On Screen             | Description   | Graphics   |
|-------------|-----------|-------|-----------------------|---|--|
| 19.35.00    | 19.40.00  | 05.00 | Pre-Match feed        | Team arrivals/ dressing rooms/ players pitch inspection/stadium shots/ fans arriving                      |  |
| 19.40.00    | 20.10.00  | 30.00 | Pre-Multi Unilaterals | When no Unilaterals – multi-camera coverage of Stadium ambience/ multi-camera coverage of player warm ups | B'caster IDs   |
| 20.10.00    | 20.14.00  | 04.00 | Warm Up feed          | Multi-camera coverage of both teams, 15s per player   |  |
| 20.14.00    | 20.15.00  | 01.00 | Stadium beauty shot   |   | Home team line ups – 15s then tactical 15s. Repeat for away team |

| Start (CET) | End (CET) | Dur.  | On Screen              | Description   | Graphics   |
|-------------|-----------|-------|------------------------|---|--|
| 20.15.00    | 20.25.00  | 10.00 | Pre-Multilateral       | Beauty shot, then multi-cam player warm ups                             |  |
| 20.25.00    | 20.26.00  | 01.00 | Stadium beauty shot    | Clean shot  |  |
| 20.26.00    | 20.28.00  | 02.00 | Stadium beauty shot    |   | Match ID (2m)  |
| 20.28.00    | 20.30.00  | 02.00 | Stadium Beauty shot    |   | Countdown to TX (2m)   |
| 20.30.00    | 20.30.40  | 00.40 | Opening Sequence       |   |  |
| 20.30.40    | 20.31.00  | 00.20 | Stadium beauty shot    |   | Match ID & weather   |
| 20.31.00    | 20.31.30  | 00.30 | Stadium ambience       | Crowd home and away shots   |  |
| 20.31.30    | 20.34.00  | 02.30 | Key player warm ups    | Player CUs, super slomo 75s each, home then away<br>Live stadium sounds |  |
| 20.34.00    | 20.35.30  | 01.30 | Stadium beauty shot    |   | Home team line up the tactical – 20s each, home then away team |
| 20.35.30    | 20.36.00  | 00.30 | Stadium beauty shot    |   | Home team subs 10s, away team 10s                              |
| 20.36.00    | 20.36.30  | 00.30 | Stadium beauty shot    | Clean beauty shot   |  |
| 20.36.30    | 20.37.30  | 01.00 | Star player comparison | 1 x super slomo per team  | Player ID & stats 25 secs each                                 |
| 20.37.30    | 20.38.00  | 00.30 | Stadium beauty shot    |   | Group standings 20 s   |
| 20.38.00    | 20.39.30  | 01.30 | Stadium ambience       | Live atmosphere crowd shots, home & away                                |  |
| 20.39.30    | 20.40.00  | 00.30 | Stadium beauty shot    |   | Match ID 20 secs   |
| 20.40.00    | 20.41.00  | 01.00 | Players in tunnel      |   |  |

| Start (CET) | End (CET) | Dur.  | On Screen                              | Description | Graphics                             |
|-------------|-----------|-------|--|-------------|--------------------------------------|
| 20.41.00    | 20.42.00  | 01.00 | Players walking on pitch               |             |                                      |
| 20.42.00    | 20.43.15  | 01.15 | Teams line up, UCL Anthem & handshakes |             |                                      |
| 20.43.15    | 20.43.40  | 00.25 | Stadium beauty shot                    |             | Home team line up 10s & tactical 15s |
| 20.43.40    | 20.44.00  | 00.20 | Coin toss                              |             | Officials IDs 20s                    |
| 20.44.00    | 20.44.25  | 00.25 | Stadium beauty shot                    |             | Away team line up 10s & tactical 15s |
| 20.44.25    | 20.44.50  | 00.25 | Coaches CUs                            |             | Coaches IDs                          |
| 20.44.50    | 20.45.00  | 00.10 | Main cams shots                        |             |                                      |
| 20.45.00    |           |       | KICK OFF                               |             |                                      |

Looking at this running order, an experienced executive producer/director points out:

As a director, with five minutes to go in a match, I'm sometimes more worried about whether I've put a score caption up at the right time, than whether an incident in the match was a penalty or not. (Executive producer/live sports director, 2013)

UEFA's General Secretary, Gianni Infantino sees issues to do with conformity slightly differently in his introduction to the 2011-12 Manual:

This Production Manual is designed to encourage you to live the UEFA Champions League experience to the full and to help you to provide the best possible coverage for your audience. (UEFA, 2011:Introduction)

In other words, UEFA demands *approved* coverage. The UEFA Champions League broadcast operation - as expressed in the Production Manual and through the actions of UEFA and TEAM Marketing at each venue - represents an unprecedented level of control that is exerted by a governing body over the final broadcast output. Whilst broadcasters can provide more local context via their unilateral presentation content and style, the core match coverage remains firmly in the hands of UEFA because:

Developments in the commercial and media world have gone hand in hand with football's evolution in recent years. Consequently, UEFA's marketing, commercial and technological activities have intensified considerably (UEFA, 2009).

Fynn interviewed in 2003, (Boyle and Haynes, 2004:64) argues that UEFA "Now recognise through control of sponsorship, advertising and TV rights that they have the power". This section has demonstrated that this market power goes a very long way to define what sports we can see, where we can see them and what the final programmes look and sound like. This is the reality of transformations in sports broadcasting rights; it is a subject that is largely absent from media studies.

## **Conclusion**

The continuing migration of market power from broadcasters and media providers upstream to the leagues and federations that control rights was discussed. The changing values and definitions used in sports broadcasting rights were also reviewed.

How increasing levels of control over output have been introduced was illustrated with examples from Formula 1 and the UEFA Champions League. These cases were used to explain how a largely unseen influence is extended to what we, as viewers, finally see and hear on screen.

The chapter opened with a brief review of the nature of intellectual property, including the confusion caused by the *idea/expression dichotomy*. The tendency of copyright to be defined by market-driven principles to demarcate who owns what was also explained. The lack of a homogenised approach to international copyright – and the subsequent reliance on national regulations for enforcement – was noted. An account of the changing values and definitions of sports broadcasting rights highlighted key factors that determine value, before the different ways that rights are broken down (by range, distribution platform, broadcast territory and period of license) were reviewed. Past and present revenues for Premier League broadcasting rights in the UK and overseas were set out.

With the escalating cost of sports broadcasting rights, a corresponding increase in the risks to broadcasters associated with acquiring such rights was noted, including the consequences of over valuing or losing important rights. A broadcaster's perspective on broadcasting rights was provided, followed by a discussion of the dilemmas that broadcasters face when acquiring expensive sports rights. It was noted that, in the UK, by 2014 only one broadcaster (BSkyB) had so far successfully monetised the ownership of expensive Premier League broadcasting rights

Finally, the important and largely unseen dimension of the prescriptions that are frequently added to broadcasting rights contracts was reviewed. The addition of production prescriptions also indicates a critical division between federation-approved international *coverage* and the localised *presentation* (structured around sports events) that is now provided by rights holding broadcasters and media suppliers. Whilst providing access to large audiences, broadcasters' influence of actual event coverage is becoming more marginal. Despite a scarcity of academic scrutiny this is a very important development that illustrates a "quiet accretion of restrictions" through the application of IP rights (Drahos and Braithwaite, 2002:4)

The battle to acquire the most appealing sports broadcasting rights has intensified in response to the rising tide of commercialism in UK sports and the continued marketisation of broadcasting. In the same way that broadcasting rights can be considered to follow one cycle behind developments in technology – particularly as new developments are expressed every three years - then the regulators in the EU and UK can be seen to follow another step behind broadcasting rights. How, among other things, regulators tackle market power and market failure in sports television is discussed in chapter 6.

## 6 | Regulation

Regulation is the third pre-production factor that influences what television sport we can see, including where and when we can see it. As Evens, Iosifidis and Smith (2013) summarise, since the 1990s:

... the UK sports broadcasting market has been subject to almost constant scrutiny by a whole series of (UK and EU) policymakers and regulatory authorities. Broadly speaking, attention has focussed on two key areas: first, legislation designed to ensure that coverage of major national sporting events remains available to all television viewers – listed events legislation: and secondly, the application of competition law to the sports broadcasting market in an effort to reduce the market power of the dominant pay-TV broadcaster, BSkyB. (Evens, Iosifidis and Smith, 2013:203).

Chapter 6 now looks at examples of how different levels of intervention impact on sports television, including several associated but less talked about dimensions including content regulation, regional and independent production quotas and the impact of Transfer of Undertakings Regulations (TUPE).

The adopted methodology mixes secondary sources (documentation and literature) with primary sources, including field notes as a participant-observer taken over a 6 year period plus, where relevant, further expert contributor testimony. When it comes to regulation my experience of sports producers is that they often prefer a slightly standoff approach to many issues, particularly Transfer of Undertakings (TUPE), hence they do not

always communicate a fully formed view (in the same way a miner may know a lot about extracting coal but, perhaps, a bit less about the coal mining industry). It is fair to say that broadcasters and executives from independent sports production companies tend to have more direct contact with regulatory and competition outcomes.

Why has television sport attracted so much attention from UK and EU policymakers and regulatory authorities? With UK sports becoming more commercially oriented and with the marketisation of broadcasting, numerous long-established social and cultural values have been put aside in favour of "the financialisation of everything" (Harvey, 2005:33). Consequently, sport and broadcasting are now globally distributed and privatised goods. Boyle and Haynes (2004:52) write, a "re-regulation of broadcasting is taking place within a more commercial and market-driven frame of reference". This process has been intensified by developments in digital technology. Typically, leagues and pay-TV providers often call for a free market approach with less regulation, while political economists advocate a more rigorous application of competition law together with listed event regulation. Whilst sympathising with the political economy position, discussions seldom foreground the *full range* of regulatory measures that apply to television sports production - some of which can determine *where* a production is made (regional production quotas) and *who* can work on it (Transfer of Undertakings - TUPE<sup>92</sup>). Chapter 6 seeks to fill this gap.

Boyle and Haynes (2004:163) raise another interesting point: "football has always worn its civic responsibility lightly". As football rewrites its cultural

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<sup>92</sup> TUPE applies when, for example, production is moved from one company to another.

contract with fans “primarily along commercial lines protected under the sign of the law” (Boyle and Haynes, 2004:79), the cultural, social and historical aspects of many clubs have been commodified and turned into elements of global branding strategy. We end up with a commercially driven Premier League operating within a wider economic climate in which the market remains the central driver<sup>93</sup>. This produces a league that is very different from the more inclusive structure adopted by the Bundesliga in 2002 and where football is considered a public good and activities, including club ownership, are grounded in the local community. In contrast to the market-driven Premier League, the Bundesliga took the view that football is one of the last activities that really brings people together, so ticket prices are set to ensure a wide range of fans can attend. Finding a balance between commerce and culture, market principles and wider social meaning, is the daunting challenge for regulators. Intervention by media regulators and competition authorities appears to be the only limitation currently placed on the conduct of leagues and federations.

The sheer pace at which technology (including new workflows and means of delivery) and sports broadcasting rights have developed since the early 1990s, has posed serious problems for regulators and policy-makers. As Boyle and Haynes (2004:165) summarise: “regulators strive to keep pace with a digital mediascape which threatens to perpetually run ahead of regulatory frameworks”. The recent move by federations to take control of

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<sup>93</sup> In the 2013-14 season Hull City fans contested a potential change in the club name from Hull City to Hull Tigers and Cardiff City, also under foreign ownership, saw their tradition blue club shirts (nickname the Bluebirds) changed to red as it is considered more lucky in Eastern markets.

their own host broadcast operations and global content distribution could leave regulators even further adrift.

So far this research has considered ways that television sport in the UK has adopted more overtly commercial models typically found in the USA, but when it comes to broadcasting policy and regulation very different values are in play, as Jeanrenaud and Kesenne (2006:6) explain:

In the US sport is seen as a commodity which has to be redesigned as viewers' preferences or sponsors' requirements change. In Europe, by contrast, sport is considered part of the cultural heritage. The dominant position in Europe is that sport cannot be reduced to being merely an audience-generating mechanism and that there is a need to preserve both its identity and independence. (European Commission, 1999)

Still considering the wider picture, Smith (2009) highlights the growth of the regulatory state as part of a general shift from government to governance associated with the withdrawal of the state from many activities as part of neoliberal thinking. Whilst facilitating conditions conducive to a free market is an objective, monopolistic tendencies still need to be curbed. Therefore a central concern of regulation is the control of market power. Given that broadcasting is an oligopolistic market then strategic behaviour, such as first mover strategy often adopted by BSkyB, can offer advantages. On the other hand, in a market with only a small number of players a dominant position, like that held by BSkyB, also risks infringing the rules. Controlling market power in sports broadcasting in the UK and Europe is a recurring theme.

It was the deregulation of broadcasting policy associated with the landmark 1990 Broadcasting Act that provided significant momentum for the transformation of television sport in the UK, including the arrival of direct competition to the established terrestrial networks from satellite broadcasters; as discussed in chapter 3, the previously closed world of broadcasting was to be exposed to the rigours of the free market. The 1990 Act also included the first formal quota for independent productions. Doyle (2002:161) reminds us that government policy initiative and regulatory measures strongly influence the economic performances of media markets while Evens, Iosifidis and Smith (2013) see too much emphasis on preserving the investments of pay-TV operators. The influence of EU-level media regulation and competition authorities on policymaking and UK broadcasters is also noted by Smith (2009). Scrutiny is applied to both the demand side (the ways that broadcasting rights are sold upstream by leagues and federations) and the supply side, the market in which the final programmes are aired. However, it is argued here that the discussion would benefit from being widened to include the activities of:

- Leagues and federations (principally those that issue broadcasting rights).
- Broadcasters and media providers (buyers of broadcasting rights and owners of distribution platforms).
- Broadcasters, production companies and producers that provide the finished content.

## **6.1 The list of protected events**

Speaking on 21 July 2010, the then Sports Minister Hugh Robertson (Conservative) supported the principle of protecting major sports events for

free-to-air coverage. At the time of writing (May 2014), the two-tiered list of protected events continues to apply.

As noted in chapter 3, as early as the 1930s during the years of monopoly an annual calendar of broadcast events had been created, one that resonated with the winter and summer seasons of sport in the UK (Scannell and Cardiff, 1991). Delivering important sporting events to a national audience became a cornerstone of the BBC's PSB remit (Boyle and Haynes, 2000:69). Arguing that it was promoting events to a national audience, the BBC resisted paying sports broadcasting rights fees. In the 1950s the removal of the BBC's monopoly status, as the Conservative government planned to introduce commercial television via the Television Act of 1954, raised concerns over bidding wars for broadcasting rights, (see Smith (2009) for a good account). The arrival of ITV saw the BBC and Parliament claim that "wealthy commercial interests might outbid the BBC and... deprive the BBC of events they expected to see on the national service" (Sendall, 1982:52). The BBC proposed the government draw up a list of national events which could not be broadcast on an exclusive basis by any broadcaster, thus averting bidding wars for broadcasting rights. The list of protected rights was first set out in the Television Act of 1954 although this was, essentially, a gentleman's agreement (Barnett, 1990).

The spectre of bidding wars was raised again in the 1980s and the list of protected events was redrafted as part of the Cable and Broadcasting Act 1984 (Smith, 2009:9) - by 1985 the protected list of national events had become statutory. The general commercialisation of broadcasting under the Conservative government continued during the 1980s and 1990s as policy restrictions were gradually watered down; the landmark 1990 Broadcasting

Act replaced the 1984 Act. Opponents of the 1990 Act claimed that it was enabling an unwelcome Americanisation of British broadcasting. With new legislation the Independent Broadcast Authority (IBA) was replaced by the Independent Television Commission (ITC), a light-touch regulator that was, in turn, replaced in December 2003 by the super-regulator Ofcom.

The arrival of BSkyB in 1990 and its subsequent acquisition, not only of the Premier League broadcasting rights, but also of rights to the Football League, England's home matches and golf's Ryder Cup established a "virtuous circle of more subscribers/more sports rights" (Booth and Doyle, 1997:280). In turn, this prompted debate about whether sport was a *public good* or a *private good*; was it right that the nation's favourite game be hidden behind a pay wall? More than 20 years later, an interesting parallel can be drawn between the commercial trajectory of the Premier League and the Bundesliga, where the German league understood the wider social value of football as a *public good*. The Bundesliga maintains a 50+1 ownership rule, ensuring clubs are (a) grounded in the local community (and not owned by wealthy foreign investors) and (b) are fully focussed on football not financial activities. Access for all levels of society is ensured through affordable admission prices offered at Bundesliga grounds.

Returning to the UK, in 1995 it was argued a situation had arisen where "three quarters of the nation will be excluded from major sports – which would only be available for those wealthy enough to subscribe" (Smithers and Cuff, 1996). The 1990 Broadcasting Act's restriction on the pay-per-view broadcasting of listed events was extended to include subscription broadcasting, a return to the position set out in the 1984 Cable and

Broadcasting Act. This is an example of how the pace of transformation in technology and in broadcasting rights had started to outstrip the regulators' ability to react.

By 1997 the Department of Culture, Media and Sport (DCMS) introduced the idea that a sport on the list of protected events must have a *special national resonance*, an event that unites the nation and is a shared point on the national calendar. As noted in chapter 2, not all sports actually wanted protected status and sought, instead, to negotiate the most lucrative commercial deals available, usually with BSkyB as with the English Cricket Board (ECB). To some sports authorities revenue from rights was more important than being seen by larger numbers of viewers on terrestrial television. BSkyB has frequently called upon leagues and federations for support following challenges from regulators and competition authorities.

As raised in chapter 3, there is no list of protected events in the US. The US Major Leagues have managed to maintain a strong presence on the 4 commercial free-to-air networks and have not migrated wholesale to pay-TV as the Premier League has done in the UK. In another major difference, the US Sport Broadcasting Act of 1961 exempted the collective selling of sponsored telecasting, or cartel behaviour, from anti-trust legislation as authorities accepted the need for a governance structure in sport, including horizontal arrangements aimed at enhancing competitive balance within each league (Fort, 2006:429). The Telecommunications Act of 1996 went on to remove most price regulation and the main frame of reference is the Sherman Antitrust Act. But the conduct of the leagues themselves includes an important difference insofar as they have adopted rules that, ultimately,

maintain the value of their broadcasting rights. The three broad regulatory principles adopted by the leagues include, (a) a fair (equal) share of television rights to all member clubs<sup>94</sup>, (b) salary caps for club rosters (including named franchise players) and (c) a reverse-order-of finish draft system for players entering the league (Desbordes, 2006). Evens, Iosifidis and Smith (2013) argue that the US case:

... illustrates that increased exposure and higher audience ratings via free-to-air television can serve the interest of teams, leagues, broadcasters, advertisers, sponsors and viewers alike. (Evens, Iosifidis and Smith, 2013:228)

Whilst professional sports have always been more malleable in the US - particularly when accommodating the demands of television - it does not follow that the country has foregone all sporting cultural heritage. Finding a balance, between commercial concerns and wider social and cultural benefits, is a key issue in the UK and Europe.

Concern that the market for the most appealing sports broadcasting rights was becoming dominated by commercial players - the Kirch Group in Germany, Canal Plus in France and BSkyB in the UK - led the EU to adopt the UK's approach of providing a protected list of sports events via legislation. Evens, Smith and Iosifidis (2013) explain how the European Parliament (EP) used a review of the Television Without Frontiers Directive (TVWF) as a convenient means to press for EU wide legislation. In November 1996, the EP approved an amendment to the TVWF Directive to ensure that coverage of sporting events of general interest are available on free-to-air TV (EC, 1997). In February 1997 proposals for an EU system of

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<sup>94</sup> As noted in chapter 5, the PL has a 50:25:25 formula.

listed events based on the principle of mutual recognition – no broadcaster would now be allowed to circumvent the rules governing protected events in any other EU state. Major event legislation was formally adopted as part of the renewed 1997 TVWF Directive and subsequently incorporated into the 2007 Audiovisual Media Service Directive (Evens, Iosifidis and Smith, 2013:77). The Davis Committee (2009) was set up to review the UK's protected list of events and recommended a return to a single list of protected events. Further decisions were deferred until (at least) 2013 leaving the current list of category A and category B events, as published by the DCMS, intact. Category A includes full live event coverage whilst category B provides for secondary coverage (primarily same day highlights shown on the terrestrial networks):

Figure 6.1, Protected List of Events (Groups A and B)

| <b>Category A Events – Full live coverage protected</b> |
|---|
| The Olympic Games                                       |
| FIFA World Cup Finals                                   |
| European Championships Finals                           |
| FA Cup Final  |
| Scottish FA Cup Final                                   |
| The Grand National                                      |
| The Derby   |
| Wimbledon Lawn Tennis Finals                            |
| Rugby League Challenge Cup Final                        |
| Rugby Union World Cup Final                             |

| <b>Category B Events – Secondary coverage protected</b>                              |
|--|
| England Home Test Cricket Matches  |
| Non-Finals Play at Wimbledon   |
| All other matches at the Rugby World Cup Finals                                      |
| 6 Nations Rugby Tournament matches involving home countries                          |
| The Commonwealth Games   |
| IAAF World Athletics Championships   |
| The Cricket World Cup – finals, semifinals and matches featuring home nation's teams |
| The Ryder Cup  |
| The Open Golf Championship   |

Without the list of protected events it is hard to see how the publicly funded BBC would have a meaningful foothold on top tier sports broadcasting rights and, even so, two of the most popular football competitions, the Premier League and the UEFA Champions League, are not included on either list. Given their exclusion from the lists, perhaps it is no surprise that the activities of Premier League and UEFA should prove of particular interest to regulators and competition authorities in the UK and Europe?

## **6.2 The Premier League**

The Office of Fair Trading (OFT) referred the Premier League's exclusive rights deals of 1992 and 1996 to the Restrictive Practices Court (RPC), where the OFT claimed that the collective selling of all Premier League clubs television rights by the Premier League was illegal (Boyle and Haynes, 2004). As discussed in chapter 2, the business of team sports is no ordinary business. For example, Neale (1964:14) asserts that: "It is clear that professional sports are a natural monopoly, marked by definite peculiarities

both in the structure and in the functioning of their markets". Leagues are necessary to professional sport; a single team cannot supply the entire market because it would have no other team to play. However, a single league can supply the entire market in conditions of a natural monopoly (Dobson and Goddard, 2007:5). It is also the case that competition between different sports is more likely than competition between rival leagues within the same sport; the Premier League is a rare example of a new league successfully replacing the dominant incumbent league (Fort, 2006:150). In professional sport, many basic economic rules are inverted - Neale (1964) highlights the *single-entity* action by leagues leading to profitable economic outcomes, naming it "the peculiar economics of team sports". Finally, leagues are necessary to provide competition and uncertainty of outcome, in addition to scheduling matches, providing officials and other joint venture conduct. There is an argument to be made that the confusion between the need for sporting competition and sporting monopoly - accepted in the US - has never been fully resolved in the UK and Europe. In part this is due to the cultural value placed on sport in the UK and Europe. To some extent this reaction is reminiscent of the reluctance to embrace professionalism (over amateurism) in the UK in the 1960s. The transformation of professional sport suggests a revision of what we, in the UK and Europe, expect from elite professional sport would be useful. It is worth repeating that it is within the gift of leagues and federations to turn their focus away from purely commercial outcomes, as demonstrated by the Bundesliga.

In July 1999, the Restrictive Practices Court ruled that the Premier League's deals with BSkyB did not impose unreasonable restrictions on the clubs, nor

was the agreement contrary to the public interest (Gratton and Solberg, 2007:159). In defending its position BSkyB argued that it was legitimate for a single broadcaster to retain exclusive broadcasting rights for a limited time, as long as rights were regularly renegotiated and sold in a fair and open manner (Boyle and Haynes, 2004: Haynes, 2005). From 2001, we see Premier League rights being sold every 3 years whereas, previously, they had been sold in 5 year (1992-97) and 4 year (1997-2001) periods (see chapter 5).

In 2000, the Premier League started to unbundle the various broadcasting rights it was offering for auction. 3 packages were subsequently created (a) to reduce the risk of further intervention from the competition authorities and (b) to increase Premier League revenues. For the 2001-04 period, BSkyB secured 106 games and NTL withdrew its bid due to financial problems. ITV secured the rights to highlights, leaving the BBC with no Premier League football at all (no Premier League match has, so far, been broadcast live on free-to-air television in the UK).

In December 2002, the Competition Directorate of the European Commission launched its own investigation into the selling of Premier League broadcasting rights (Haynes, 2005:75). According to Smith (2009) the Commission set out to negate the potential anti-competitive effects from the collective selling of Premier League broadcasting rights. Boyle and Haynes (2004) add:

The key to the whole negotiation and bidding process was the EC investigation and its 'guiding hand' in the structure of the deal. While not prescriptive, the EC edict that

collective selling could only exist where the consumer ultimately benefitted from wider choice and no broadcaster could exclusively sew up all the rights clearly influenced the initial tender document issued by the Premier League in June 2003. (Boyle and Haynes, 2004:47)

Initially, the rights for the period 2004-07 consisted of a gold package of 38 matches starting at 16.00 on Sunday afternoon, a silver package of 38 matches on Monday evenings, midweek and Sundays at 14.00, and a bronze package of 92 matches on Saturdays at 13.00 and 17.15 – a total of 138 matches, up from the previous total of 106. However after the initial bidding process had begun, the Premier League separated the bronze package into 2 licenses, creating, in all, 4 packages of live rights. Boyle and Haynes (2004) point out a traditional highlights package was available, plus a new package of rights that allowed a broadcaster or a club channel to screen as live re-runs from midnight on match day. Additionally, short-form clip rights to all 380 Premier League matches were available for distribution on mobile phones from 5 minutes after the end of the games. It appeared that the attention of regulators and competition authorities was having some impact. Or was it? In August 2003, BSkyB successfully bid for all 4 live match packages giving them more games for less money when compared to the deal for 2001-04 (Boyle and Haynes, 2004:49). It is doubtful that strengthening BSkyB's position was the preferred outcome of this intervention.

Under further pressure from the Competition Commission, the Premier League agreed that BSkyB should sublicense 8 matches per season to

another broadcaster in an auction process. Haynes (2005:75) reports that that BSkyB executives saw the leakage of 8 games as undermining the rights they had just purchased. However, a reserve price for the rights was agreed and, as no broadcaster met this price, the 8 sublicensed matches reverted to BSkyB.

But there had been concessions; the period for rights was reduced to 3 years (Haynes, 2005:76) and the Premier League was required to ensure there was a second broadcaster that held live rights for the period 2007-10 (Gratton and Solberg, 2007:6). In 2005, it was agreed that live rights would be sold in 6 balanced packages (of 23 matches) with no one bidder being able to buy all 6 packages. The door was finally opened to a new broadcaster. BSkyB secured 4 packages and 92 matches, whilst newcomer Setanta acquired 2 packages, totalling 46 matches. Whilst the European Commission had successfully ended BSkyB's monopoly of live rights to Premier League football it is questionable whether "the consumer benefitted from wider choice" – yes, there was more choice available but viewers that wanted to see all Premier League matches now had to buy 2 subscriptions at greater cost, including coverage from an inexperienced Premier League broadcaster. Whilst the outcome appeared to suit the Premier League, and with no live rights for any free-to-air broadcasters, it could be argued that it was not in the best interests of consumers. Increased competition for rights *did* result in an escalation in the prices paid to the Premier League.

In the next rights issue (2010-13) Setanta was not able to match its previous bid price (Sweeney, 2009). However, the company was able to secure a single package of rights for a reduced outlay, due to the restriction

placed on the Premier League to ensure that rights were split between 2 broadcasters. The loss of a package (from 2 packages including 46 games, down to one with 23 games) raised questions about Setanta's strategic position in the UK pay-TV market. Failing to attract sufficient new subscribers, the company struggled to pay the fees due to the Premier League and, in summer 2009, fell into administration (Smith, 2009:17). The rights were quickly re-auctioned and awarded to ESPN (Robinson, 2009).

In 2012, as a participant-observer working for IMG (the producer of Premier League Productions), I heard predictions about a new bidder for Premier League rights from industry insiders, with Al Jazeera expected to fulfil this role. However, it was BT Sport that emerged and, by providing some serious financial competition to BSkyB, helped to propel domestic revenue for the period 2013-16 to an all time high in excess of £3 billion for the 7 packages of live matches offered (Press Association, 2012). The winner, once again, was the Premier League. Former BSkyB Head of programming David Elstein added his view that BSkyB:

... is also an extremely tough competitor, and treats regulators with as little regard as it treats commercial rivals. More than 20 years ago, its mantra was: we will strangle cable before cable strangles us. It has taken on the likes of the Office of Fair Trading, the Competition Commission and the broadcasting regulator, Ofcom, as each of them has tried to level up the playing field in television. (Elstein, 2010)

Have the regulators succeeded in levelling the playing field? In 2014 BSkyB's hold on Premier League football remains robust. As in previous cases, viewers wishing to see all available Premier League matches are

required to pay for 2 subscriptions for 2013-16, one for Sky Sports and another for BT Sport (in early 2014, existing BT broadband customers receive BT Sport for free). Had even one package of live rights ended up being available on a free-to-air broadcaster then it would be easier to see the point of this intervention - a split between 2 pay-TV services delivers less benefit than providing wider access via free-to-air broadcast. In my view, this underlines the difficulties of regulators and competition authorities in keeping up with the activities of the Premier League, BSkyB and BT Sport. Whilst the application of legislation via the list of protected events offers tangible results, the results when applying competition law in respect of the Premier League appears harder to justify.

### **6.3 The UEFA Champions League**

The premier European club competition was re-launched in 1992 as the UEFA Champions League (UCL), with the new format replacing the European Champion's Cup. Unlike the Premier League, coverage of the UEFA Champions League took much longer to migrate to pay-TV in the UK than it did in many other countries across Europe where it had already found a home. So, whilst BSkyB was able to show exclusive live Premier League matches from 1992-93, it was not until 2003 that the UCL first appeared on BSkyB. BSkyB paid approximately £240 million while ITV paid £160 million giving the free-to-air broadcaster first picks of Tuesday night fixtures (van Wijk, 2013).

The split-broadcasting arrangement, somewhat like the Premier League but, crucially, including a free-to-air outlet, was due to intervention from the

European Competition Commission as it sought to investigate the selling of football rights in a range of media markets across Europe. Whilst the Commission accepted the declaration of the specific characteristics of sport adopted by the European Council at Nice in 1999<sup>95</sup> the EU, according to Boyle and Haynes (2004), increasingly viewed sport as a business.

The EC investigation into the anti-competitive joint selling of Champions League rights resulted in no single national broadcaster being able to acquire sole live rights to the competition from 2003-04 (Haynes, 2005:66). With 14 categories of rights being marketed centrally by UEFA and TEAM Marketing, new rights were created which meant that more broadcasters might be able to secure rights. This allowed BSkyB to acquire the majority of rights in the UK, reducing ITV's eventual broadcast output to a single Matchnight per round of games.

According to Boyle and Haynes (2004), at this time a number of rights reverted back to individual clubs and there was a greater emphasis on mobile and Internet rights, with UEFA seeking to grow revenue alongside an expanding European broadband market. In 2014, it is unclear to what extent this market has materialised, as television coverage remains by far the most popular medium through which to view Champions League content. In terms of additional competition to acquire Champions League rights from 2015-18, then BT chief executive Gavin Patterson made good on his promise that BT Sport would bid for these rights (van Wijk, 2013). In November 2013, BT was granted exclusive rights to 350 Champions League

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<sup>95</sup> [http://ec.europa.eu/sport/documents/doc244\\_en.pdf](http://ec.europa.eu/sport/documents/doc244_en.pdf), accessed 21.10.2013. Including point 15, which recognises that the sale of television rights is one of the greatest sources of income for certain sports.

matches a season for 3 years at a cost of £897 million for 4 years from 2015. Although Goodley and Monaghan (2013) report BT chief, Gavin Patterson claiming to “give sport back to the fans”, and acknowledging that BT had injected “a welcome element of competition” into the market, it remains to be seen how this rights acquisition sits (a) with the requirement that rights should not be held by a single broadcaster and (b) how BT plans to make some matches available free-to-air. BT’s channel positions on the free-to-air digital terrestrial television service Freeview is likely to be relevant although, in 2014, these signals are scrambled.

Given the rights sale to BT Sport the benefits of EU wide intervention in the auctioning of Champions League broadcasting rights could be contested. However of potentially even greater significance is UEFA’s own introduction of the *Financial Fair Play Regulations* (FFP), first approved in 2010.

According to UEFA’s website these rules are set out to:

- Introduce more discipline and rationality in club football finances.
- Decrease pressure on salaries and transfer fees and limit inflationary effect.
- Encourage clubs to compete within their revenues.
- Encourage long-term investments in the youth sector and infrastructure.
- Protect the long-term viability of European club football.
- Ensure clubs settle their liabilities on a timely basis.

The FFP regulations came into full effect for the 2013-14 season. Whilst FFP is not the completely business-oriented closed system used in US leagues, it

is the strongest suggestion yet that regulations similar in intention to those adopted by US leagues, including salary caps and other agreed measures<sup>96</sup> designed to promote competitive balance and uncertainty of outcome (critical to maintaining the value of broadcasting rights) are being considered for application in a European context. In May 2014 UEFA sanctioned Premier League club Manchester City under the Financial Fair play Rules imposing a fine of £50 million and restrictions on their Champions League squad for the 2014-15 season (Gibson, 2014). UEFA sanctioned 9 clubs that breached FFP rules.

The argument here does not seek to devalue the wider benefits from listed event regulation and the application of competition law, but, in addition to these measures, the leagues and federations should be encouraged to take more responsibility for balancing their books and for managing their affairs more constructively, including broadcasting activities and wider social outcomes. This path is likely to be more beneficial to more people in the longer term. Both the German Bundesliga and UEFA have demonstrated ways to engage with their civic responsibility; the Premier League might also consider this approach.

#### **6.4 Ofcom, UK market regulation**

As a result of the Communications Act 2003 regulatory powers in the UK passed from the ITC to the newly formed Ofcom. Ofcom's duties include:

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<sup>96</sup> These include an equal share of broadcasting revenue, the reverse order-of-finish player draft system and naming of franchise players.

- Managing, regulating and assignment of the electromagnetic spectrum and licensing portions of the spectrum for television broadcasting.
- Specifying the Broadcast Code, including mandatory rules including the protection of children, harm and offense, crime, religion, impartiality and accuracy, elections, fairness, privacy, sponsorship and commercial references.
- Rules on the amount and distribution of advertising.
- Undertaking public consultations.
- Dealing with viewer complaints.

Ofcom has also developed Terms of Trade/Codes of Practice that apply to rights deals between independent producers and commissioners/broadcasters. These terms<sup>97</sup> were introduced in the Communications Act 2003.

Returning to questions of market power and the supply of programmes in the downstream market, such investigations are not limited to the EU Competition Commission. Between 2007 and 2010, Ofcom completed a review of the pay TV market in the UK (Ofcom, 2010). The review followed complaints from BT, Virgin Media, Top-Up TV and Setanta that BSkyB exerted a vicious circle of control that crushes competition (Smith, 2009:20). In particular it was the ability of BSkyB to determine carriage charges - both for rival channels on its own platform (and for EPG access) and for carrying its own brands, such as Sky Sports - that was considered

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<sup>97</sup> The terms relate to how rights should be sold and priced, with independents retaining a share of IP rights on created content. In sports production secondary rights are retained by the sports governing bodies.

problematic. The outcome required BSkyB to lower the wholesale prices it charges the rival companies for Sky Sports 1 and Sky Sports 2. Ofcom appears exasperated by the experience as expressed in the Pay TV Statement (para:1.25):

Our review of these negotiations reveals lengthy and ultimately fruitless discussions over a number of years between Sky and other pay-TV operators over possible wholesale of Sky's premium channels. This impasse has remained despite, as Sky agrees, there being an immediate financial benefit to Sky from wholesale supply. We believe this is because Sky is acting on two strategic incentives – to protect its retail business on its own satellite platform, and to reduce the risk of stronger competition for content rights. (Ofcom, 2010:7)

Former BSkyB executive David Elstein adds his view:

... BSkyB has become notorious for taking on regulators, winning some battles, prolonging others, and generally giving the competition authorities pause before embarking on any restraining course. (Elstein, 2010)

What does this constant skirmishing mean? Is regulation pointless? Have broadcasters like BSkyB and organisations like the Premier League and UEFA become too powerful? The argument is that the more powerful the league or broadcaster is then the more necessary potential intervention becomes, particularly where there is monopoly provision. Smith (2009:22) concludes that the role played by the EU *has* enhanced the capacity of the UK government to pursue its desired outcomes. My own view is, whilst regulatory principles are to be applauded in their intention, the actual outcomes, at least in the cases cited above, leave a lot to be desired.

In the case of Ofcom's Pay TV revue, in August 2012 the Competition Appeals Tribunal (CAT) said that Ofcom's entire case against BSkyB was unfounded (Hewlett, 2012)<sup>98</sup>. But, while Ofcom was less successful in limiting BSkyB's activities, in 2012 BT announced its arrival as a very well funded rival to BSkyB in the competitive market to acquire appealing sports rights. In 2014 Ofcom announced a new revue into whether BSkyB should still have to wholesale its key sports channels given changes in the market (Mance, 2014).

Whilst this is a challenging area, in my view some of the attention regulators and competition authorities have focused on sports broadcasting often appears (a) to be too late (regulating on technology and broadcasting rights that have had a chance to become well established as practice is usually problematic) and (b) often seems to misunderstand some of the "peculiar economics of professional sports" (Neale, 1964). The situation is symptomatic of powerful and extremely well funded leagues and pay-TV providers using technology and rights to serve their own commercial interests first and foremost. However, it seems reasonable to ask if more lasting solutions might be found by considering the experience of the US leagues and in self-motivated league and federation action, including improved governance and increased civic responsibility as was the case with the re-launch of the German Bundesliga in 2002. As the Premier League continues to expand its own content production arm, including a 24/7 Premier League global channel, and federations provide international host

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<sup>98</sup> BSkyB (2013:13) confirms that BT was granted a right to appeal the CAT decision on 26.04.2014.

broadcasting services for their own events it is unclear how and where regulators will be able to intervene in the future.

## **6.5 Regulating content production**

Discussion of regulation and intervention tends to be focused on upstream activities and seldom considers the direct contact with broadcasters and producers that regularly occurs downstream on the content supply side. For example, each Ofcom license requires all broadcasters (and therefore all producers, whether in-house or independent) to comply with the Broadcasting Code on content standards (Ofcom, 2013). This interaction is worth noting.

For sports broadcasting the content standards categories that apply have become more extensive with the corresponding expansion of sports output over the past 20 years. These include: the protection of children, harm and offense, crime, religion, impartiality and accuracy, elections, fairness, privacy, sponsorship and commercial references. Of these, probably only elections and, hopefully, crime are less relevant, although an increasing number of betting scandals suggest vigilance is required.

However, among many active sports producers the Broadcasting Code is simply not well known; the level of operational knowledge is, in my direct experience over the last decade, very low. As a senior executive producer for a leading independent confirms:

Young producers are not aware of regulations like fairness and privacy. We did our stints as assistant producers and didn't become full producers until we were ready to do so. Too

many young sports producers are promoted quickly and are not aware of their responsibilities. (Senior executive, Independent production, 2013)

As making sure producers *do* know their responsibility seems a reasonable expectation this raises a question about why these responsibilities are not always well known. A senior producer explains a difference unique to television sport: the apparent hegemony found in sports production culture. This is a kind of self-policing of accepted practice that represents a form of covert compliance in itself:

Most people [sports producers] grew up watching sport so, when they become producers, they tend to replicate what they saw and what they think is appropriate. It's a closed world. You can't step out of the box. (Senior sports producer, independent sports production, 2012)

Tunstall (1993:2) argued that television sport was a closed world. Over 20 years it appears that not much has changed. In my view, television sport relies on producers behaving predictably within unspoken but consensual parameters. Consequently, when it comes to the Broadcasting Code there is, in my direct experience, very little in the way of training for independent sports producers. Guidance, when it is available, tends to come from the commissioning channel, whether it is the robust position taken by BSkyB in following Ofcom rules, through to an extremely relaxed position like that of Trace Sports. In other words, the frame of reference can be rather wide.

Typical examples that attract the attention of compliance officers include the increasing commercialisation of top sports stars, particularly around sponsorship and branded clothing, so undue prominence can be a problematic area. Whilst Formula 1 presents so many sponsors logos that none may stand out Sir Alex Ferguson can, in October 2013, gain blanket coverage across numerous broadcasts promoting his new book. Even apparently innocent mistakes, like a misplaced shot of a player tying up a branded football boot prior to training (shown, say, in a short feature) can fall foul of the rules and will need to be re-edited at the producer's expense.

For sports events that heavily feature betting, for example Channel Four's horse-racing, a balance is required in the prominence given to, say, Littlewoods betting options over services from other providers.

Harm and offence is not limited to more obvious shots of players mouthing obscenities on screen (or of foul language or racist abuse being chanted in the ground), In late October 2013, BT Sport fell foul, for a second time in just 24 hours, of crude and offensive gestures that were made by in-vision guests during two different football shows (Sale, 2013).

Between January 2011 and July 2012 I produced 140 x 26 minute documentaries for IMG on behalf of Trace Sports. In these films I dealt with issues of privacy – from revealing where a person lived, to showing the license plate on their car - in the great majority of the films. Privacy cropped up the most, with undue prominence and other commercial issues (such as sponsorship) cropping up in many. In a period where constant access to Internet and YouTube content is taken for granted, younger

sports producers appear to be less aware of the Broadcasting Code. And this lack of understanding can even extend to broadcasters. A revealing example is found with Trace Sports as it constantly pushed IMG for access to top football players. Suggesting ways to improve access, a senior Trace Sports executive attended a private party given by Didier Drogba (at the time playing for Chelsea FC). Speaking in 2012, the executive confirmed that she had covertly recorded material from Drogba's event (using her mobile phone), posted it on YouTube, badged as Trace Sport content, and had a very large number of hits. The Trace executive did not accept this conduct infringed Ofcom privacy laws even though the material was covertly recorded and broadcast without permission.

Whilst it is easy to argue that values, such as the Broadcasting Code, need to be supported and upheld across the downstream supply side, it is apparent that emerging digital platforms, user-driven content and federation based productions will increasingly challenge such values and how they are implemented. That a major media provider like BT Sport can fall outside these guidelines is another reason for concern.

## **6.6 Regional and independent production quotas**

The largest impact of regulation on sports broadcasting in the UK is found in regional production quotas. Senior independent sports production executives have described this impact as "massive". Regional quotas are frequently paired with independent production quotas, allowing broadcasters that outsource content to complete two quota requirements with a single commission.

Historically, the independent production sector has delivered high levels of content for PSBs. The creation of Channel Four as a publisher-broadcasters and the formal introduction, through the 1990 Broadcasting Act, of a statutory 25% independent quota for the BBC were important drivers in developing the UK's independent production economy (HMSO, 1990). Again, the thinking behind such quotas is rational, well intended and hard to argue with. However, the reality on the production supply side is very often at odds with the objectives. As an executive producer at an independent that regularly supplies material to the BBC said in 2013: "The BBC has to do a certain amount of regional and independent production hours, so it decides to place its snooker production outside." In this case outside is an independent and regional production company based in Scotland. The executive producer continues:

The rules state that 75% of the production must be generated from that region.

Unfortunately, there are not the outside broadcast companies in Scotland, let alone the experienced snooker producers, directors, assistant producers, cameramen and others to get anywhere near this figure. It is a complete farce. (Executive producer, independent production, 2013)

The company in question has a single representative based in Glasgow with the senior staff based in London spending a great deal of time wondering who and how this production can meet the qualifying regulations.

From my own experience as a participant-observer in the independent sector I am aware of several other examples. Channel Four's *Football Italia*

was chosen to fulfill the broadcasters regional production quota. As a result, the production moved from London to Yorkshire (Sheffield, then Leeds), cities that do not offer direct flights to Italy where the programme was shot. In this case, a proportion of the staff *was* regionally based, but more came from the north west of England than from Yorkshire. The production was supervised and funded from London. Some sports productions do sit more comfortably within regional production quotas, particularly where an event may be based in that region, for example some BBC darts coverage.

The trend towards increasing specialisation in sports productions, combined with limited contracts (limited in budget and in duration) threatens to undermine the intentions of such regulation; it can become a box ticking operation by broadcasters. Speaking to a range of contributors, including several senior executives, it is apparent that, in a number of cases, a degree of obfuscation is involved in meeting all the conditions required under these quotas. Therefore, the extent to which the quotas help regional development might be questioned.

## **6.7 Transfer of Undertakings Regulations (TUPE)**

While broadcasters and media providers respond to upstream tender processes that allocate sports broadcasting rights, an important part of the downstream supply side production economy involves subsequent tender documents called Requests for Production (RFP) or Invitation to Tender (ITT). These tenders are issued by rights holding broadcasters, media providers and federations and are concerned with a range of outputs, from a single sports production for a federation right through to a broadcaster's

entire sports output, as was the case for ITV Sport in 2009 and for a large proportion of BT Sports production in 2012. The respondents are mostly independent sports production companies, for example IMG Sports Media, Sunset + Vine, North One TV (formerly Chrysalis) and Century TV, as they compete to win these contracts and build their businesses using a cost plus percentage fee model that, typically, delivers small and sometimes even negligible profit margins.

The UK has implemented the EC's Acquired Rights Directive 1981 amended in 1998 and replaced in 2006 with new regulations (Keter and Jarrett, 2011), on *Transfer of Undertakings (Protection of Employment) Regulations 2006* or TUPE. The regulations are designed to protect employees whose business is being transferred to another business – employee's terms and conditions of contract should not be worsened before or after the transfer. TUPE legislation is often complex and has come to be applied to downstream production tender processes in television sport.

In 2009, I was a participant-observer responding on behalf of IMG when Niall Sloane, the newly appointed director of sport at ITV, sought competitive tenders to take over production of all ITV Sports' output. However, the application of TUPE meant the incumbent production team based at ITV was protected. This meant that any bidding company had to deliver a cost-efficient production plan at the same time as hiring all of the ITV Sport staff, many of which had lengthy service and subsequent redundancy entitlements. In other words, had an independent production

company won a 3 year contract to produce ITV Sport output, it would also inherit a substantial financial liability including redundancy settlements<sup>99</sup>.

Whilst the logic of TUPE is apparent in the case of the ITV tender (where a whole department may, potentially, have been relocated) this logic is much less obvious in cases where a rights holder decides to tender for *alternative* production services – when they are seeking a change direction. In 2012 such a case involved Al Jazeera Sport. Again as a participant-observer, I was aware the company had had content produced by ITV, but it now wished to consider alternative producers, so Al Jazeera put its portfolio of production out to tender. With an annual budget of around £7 million this production interested several independent sports production companies. However, legal advisors confirmed that TUPE applied. If the contract were to be awarded to a company other than ITV, then the current production staff (hired by ITV but working for Al Jazeera) would need to be transferred across at the exclusive risk of the new production company and not at the risk of the rights holder, Al Jazeera. Firstly, it is hard to see how production output could be changed substantially if TUPE required the outgoing staff to be placed on the new production. Secondly, the incentive for an independent sports production company, already working on slim margins, is further reduced if TUPE is applied. Again, this is an example where, in theory, the objectives of regulations are fundamentally well intended but, in practice, they fail to make much sense in the circumstances. In the past 5 years, TUPE has increasingly been applied to sport production tenders. In another example, when, in 2011 Channel Four acquired the rights to all top

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<sup>99</sup> ITV made their own production department bid for the contract and, presumably having delivered cost savings, was awarded the contract.

class UK horse racing the production services were put out to tender. However, the winning company had to TUPE-in members of the outgoing production team in order to secure the contract<sup>100</sup>.

Looking at such examples, the evidence suggests there is often a gap between the objectives of downstream supply side regulation and the actual outcomes. In terms of regulation and intervention as applied downstream to the content supply side, then regional production quotas and TUPE can be seen to have had a massive impact on the activities of independent sports production companies and are important but often neglected factors that are shaping the content supply market.

## **Conclusion**

Regulation is the third pre-production factor that influences what sport we can see, where we can see it and can influence who makes the final programmes. Cultural, social and historic values surrounding sport have, to some extent, been maintained in Europe but this is under constant threat from the ever-increasing commercial and market-driven activities of leagues and federations, including the Premier League and UEFA. The crucial role of the list of protected list of events was explored, including the adoption of similar protection across the EU. With neither included on this list, interventions against the Premier League and UEFA were reviewed and questions about the usefulness of some outcomes were raised, particularly the impact on the final consumer. In the case of the Premier League, it was EC intervention that brought B SkyB's monopoly hold on broadcasting rights

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<sup>100</sup> In these examples I either had first-hand experience of the discussions or have spoken directly with several senior executives that were involved.

to an end. However the same intervention caused further inflation in broadcasting fees, benefitting the Premier League.

Although there is no protected list of events in the US, the Major Leagues have maintained a strong presence on the 4 free-to-air commercial networks and have not migrated to pay-TV. The leagues have also adopted voluntary rules that help maintain the value of their broadcasting rights, including (a) an equal share of television rights to all member clubs, (b) salary caps for club rosters and (c) a reverse-order-of-finish draft system for players entering the professional leagues. Evens, Iosifidis and Smith (2013) conclude that the increased exposure and higher audience ratings delivered by free-to-air television *can* serve the interests of teams, leagues, broadcasters, advertisers and viewers alike.

Consistent with providing a supply side perspective some ways that regulation *directly* impacts on production practices was discussed including, in the UK, the role of Ofcom in regulating (a) the market and (b) maintaining production standards. Threats to the values as set out in the Broadcasting Code were discussed. These included an apparent hegemony among sports producers that led to a kind of self-policing of standards, plus challenges from digital media platforms where content is largely unregulated.

This chapter also discussed two regulatory aspects not normally discussed in the literature: the impact on independent production companies of regional production quotas and the impact of TUPE regulations insofar as this can determine who will work on a production when a commission is

transferred from one production company to another. The chapter concluded by observing the gaps between the theory of regulation and the practical outcomes found downstream on the production supply side, this was despite the positive intentions that underline regulations.

It was also suggested there was a need for new ways of thinking about regulation in the upstream markets, including looking at (a) the solutions adopted by the US leagues and (b) more constructive self-management by leagues and federations to provide a more constructive path forward.

Having addressed the second research question - how do largely unseen upstream pre-production processes (technology, broadcasting rights and regulation) interact and increasingly influence what television sport looks and sounds like, where it can be seen and who can see it? – part two of the research is concluded.

In part three, the focus turns to a micro-level analysis of the work of broadcasters and media providers, plus the day-to-day work of independent sports production companies as the downstream impact of developments in technology, broadcasting rights and regulation is discussed.

## Part three | Challenges and trends

As part two considered transformations in technology, broadcasting rights and regulation, and how these factors have shaped the development of television sport in the UK, it was argued that many more critical decisions about what sport we can see, where we can see it and what it looks and sounds like have migrated upstream away from broadcasters and sports producers. Part two also illustrated subsequent changes to the downstream content supply side, including examples of new workflows (Premier League Productions) and the noteworthy extension of control exercised by federations over the final broadcast output (Formula 1 and UEFA Champions League).

Part three now addresses the third research question: how do upstream pre-production processes impact on (a) broadcasters and media providers (including *who* now provides sports media) and (b) independent sports television production, from company-level activities to the shop floor and the day-to-day work of sports producers and directors? Part three adds a micro-level view to the continuing supply side oriented perspective as it seeks to fill a gap in the literature dealing with contemporary television sport production.

As demand continues to outstrip supply, increased competition to acquire sports broadcasting rights has delivered good economic news for the elite leagues and federations (Fort, 2006:53). But what are the challenges now faced by broadcasters and media providers? Under review in chapter 7 is how the commercial performance of broadcasters and media providers has

become increasingly linked to the acquisition and retention of critical sports broadcasting rights. Also considered is how the downstream market in content provision is being reshaped as a result. Faced with diminishing control and increasing prescriptions - since 2005 the IOC, FIFA and UEFA have all taken control of host broadcast operations for their events, including the provision of non-controversial international coverage - where does this leave broadcasters? For major sports events, how significant is the apparent split between approved federation-based *coverage* and the localised *presentation* offered by broadcasters? As the volume and scope of sports television has expanded can a reciprocal contraction in critical comment be identified? Chapter 8 argues that power continues to migrate upstream to the leagues and federations; it usually does so in ways that are seldom discussed, like increasingly prescriptive coverage.

Chapter 8 provides a micro level view as trends in independent sports production are reviewed. The trend towards ownership of small independent sports production companies by private equity firms or by other investors provides an economic paradigm shift that is used to explain the emergence and rapid extension of new roles on the production side, including legal, business and production management positions. This raises new questions including: to what extent has the operational side of production become separated from the editorial and creative side? How is this trend recasting the work of sports producers and directors?

Chapter 9 provides a conclusion for the research, including discussion of the paradox of contemporary sports television production.

Consistent with offering evidence from the supply-side, chapter 7 combines primary research - extensive field notes made over 6 years as a participant-observer are supported by short subject-specific contributor interviews - with secondary research from contemporary sources, including business reports, online newspaper and trade articles. As the sports television market continues to move rapidly the general challenges and trends are noted rather than extensive case studies provided (which could quickly be out of date). Shifting to the micro level chapter 8 is constructed around primary research including longer form semi-formal interviews held with a select group of key executives, senior producers, directors, heads of production and production managers working in independent sports production between 2011 and early 2014.

## **7 | Broadcasters and media providers**

The challenges facing broadcasters in 2014 are now considered, including: the increasingly complex relationship between rights ownership and the commercial performance of broadcasters and media providers, the emergence of host broadcast operations run directly by the organising federations, indicative trends including the increasingly important role of presentation for broadcasters, how more content is provided via additional platforms and how increased scope has delivered less criticism.

### **7.1 Commercial performance and market polarisation**

Whilst increased competition to acquire sport broadcasting rights benefits leagues and federations, broadcasters and media providers face a number of challenges, with economics providing a particularly high barrier to entry. Sports broadcasting is an oligopolistic market structure dominated by large networks (Doyle, 2002); one supplier's actions can have a significant impact on its competitors (Brander and Spencer, 1983). Two elements are of critical importance to all broadcasters: audiences and content. Cottle (2003) provides a useful summary of how the market structure encourages certain types of behaviour:

This involves an inherent tendency towards media concentration through buying up (or out pricing and ruining) competitors, processes of vertical integration (extending control over the entire production and distribution processes), and horizontal integration (combining related or complementary businesses) as a way of reducing costs, increasing market share and corporate control. A number of other consequences flow from this same logic of economics. (Cottle, 2003:9)

For Boyle and Haynes (2004) the consequences of opening British broadcasting to market forces included the introduction of full commercial competition in 1992. BSkyB established itself as the dominant player in the UK sports television market as the company amassed a portfolio of the most appealing live sports rights and grew its subscription base. As noted in chapter 6, it was only the intervention of EC competition authorities that ended BSkyB's monopoly hold on live Premier League rights. As the dominant force, BSkyB also had a major say in determining new distribution methods; it strictly controls access to its platform, including its EPG and the critical audience data collected.

With the UK's terrestrial broadcasters unable to compete economically with BSkyB no further threat was posed by the arrival of Setanta, or when Setanta failed in 2009 and ESPN acquired Setanta's former rights. However, in 2012 the arrival of BT in the UK sports rights market, followed by its 2-channel launch in summer 2013, has seen the competition to acquire key sports rights intensify further, creating consequences for both corporations.

BT was motivated to enter the market due to concern the company could lose critical core fixed-line telecoms business, particularly broadband, to BSkyB. Hewlett (2013) speculates BT had £700 million annual revenue at risk. In this case attractive sports content was used to bolster BT's existing services - BT Broadband customers were offered the new BT Sport package free of charge.

BT's initial investment of £400 million per year on elite football and rugby union rights was followed in November 2013 by another £300 million per

year deal agreed for the purchase of European football rights (UEFA Champions League and Europa Cup from 2015). At £897 million for three years, BT's winning bid is more than double the amount paid jointly by BSkyB and ITV for the previous 3 year period. Enders Analysis (2013) calculate that, whilst BT can absorb this cost due to the large size of the company, the direct revenue returns through subscription charges and advertising on BT Sport are expected to fall far below the annual rights payment. Whilst BT's initial cost-versus-income equation can be questioned, Garside (2014), reviewing figures for the final quarter of 2013, reports that BT's push into football and fibre broadband has helped deliver a forecast-beating 2% rise in revenues across the BT Group, with BT Sport attracting half a million extra customers (to 2.5 million in total). This suggests the ways the most expensive sports broadcasting rights are being valued is becoming more complex as is increasingly linked to the overall corporate performance of the largest media providers. Owning attractive sports rights is another way of safeguarding their other businesses.

Looking ahead, BT is expected to bid for 3 years of Premier League rights from 2016. As a participant-observer, in early 2014 I was aware of industry speculation surrounding a potential joint bid from BT and Al Jazeera to acquire Premier League rights, but BT has more prosaic issues to deal with. These include the potential reaction of the company's institutional shareholders to any substantially increased bid (and the increased risks this would involve) plus, on an operational level, whether BT is willing to become a full pay-TV provider - including the need to raise its subscription fees, address distribution capacity and provide improved customer services. Brignall (2013), reviewing Ofcom data, notes that the level of complaints

from BT TV customers in August 2013 about the quality of service provided more than doubled and were running at 11 and 28 times the rate of complaints against Virgin Media and BSkyB respectively – half of the complaints were about the newly launched BT Sport channels. Williams (2013) reports the complaints centred on difficulties in receiving the channels. Prior to the launch BT's TV service was already the industry's worst performing in terms of complaints to Ofcom, attracting 6.5 times the average (Williams, 2013). Through my involvement in production services tenders, I note both ESPN and BT Sport were in a hurry to launch their channels. In my view, the practical difficulties that need to be overcome when delivering a quality broadcast service spanning several channels are easy to underestimate.

The next Premier League rights auction is scheduled for May 2015 with Dr Toby Syfert of Enders Analysis (Williams, 2014) suggesting the Premier League could seek to bring the process forward by six months to exploit the fierce competition between BSkyB and BT; this would be a commercially opportunist move by the Premier League. Irrespective of the schedule, Hewitt (2013) predicts inflation from BSkyB's current £750 million per year to a staggering £1.2 billion per year would be required for BT to secure these rights, with a three-year package price exceeding £3.5 billion. In this scenario BT's annual outlay for rights would exceed BSkyB's £1.45 billion (2013 figures) but with a smaller portfolio of sports available to entice viewers. To recoup this outlay, Hewitt predicts BT would need to charge subscribers £40 per month in comparison to £22 charged by BSkyB.

The connection between sports rights ownership and corporate performance was also underlined by BSkyB's figures for the six months to the end of December 2013. With 38 Premier League matches assigned to BT Sport, all UEFA Champions League and Europa League matches migrating in 2015 and FA Cup matches to be split between BT and the BBC from 2014-15, BSkyB reported an 18% fall in pre-tax profits (BSkyB 2013; Sweney, 2014b). The company's adjusted operating profits (the figures most closely watched by analysts) fell by 8% year-on-year. BSkyB's share price also fell 2.6%. Addressing the forthcoming Premier League rights bid BSkyB's chief executive Jeremy Darroch is quoted as saying:

Of course the Premier League is an important set of rights, we get that, we will go in with a clear view of what we seek to achieve. Whenever [the auction] arrives we will be ready and in good shape for the process. With any set of rights there is a price beyond which we don't think it provides value. That was the case with the [UEFA] Champions League. It accounted for just 3% of viewing and there were better ways [to invest]. (Sweney, 2014b)

The coverage of top-flight football has been essential to BSkyB. Gratton and Solberg (2007:143) suggest that BSkyB risks losing 50% of its subscribers without Premier League coverage. Throughout the 1990s, having spent over 50% of the value of its sports programming expenditure on football (Szymanski, 2006:155), how BSkyB could seek to add further innovation after losing rights to the Champions League to BT Sport from 2015 presents a major challenge. Losing further rights may lead to diversification in an effort to retain subscriptions.

The remarkable amounts of money involved in acquiring sports broadcasting rights is also linked to increasing amounts of risk and a very real danger of encountering *winner's curse*, of paying too much and the underlying business model failing (Fort, 2006:64) – as Darroch said, BSkyB recognise there is a price beyond which value is lost. Despite such risks the market is still driving forward, Rankin (2013) notes that the sports rights market grew 14% in 2013 and Deloitte, anticipating the market in rights to hit £16 billion in 2014, sees no end in the rush to acquire premium content with revenue growth driven by new broadcast deals for Premier League football, Germany's Bundesliga and MLB Baseball in the US. Increases in sports right payments are forecast to outpace global pay-TV revenues, suggesting that the stakes (and risk) continue to rise. In market conditions like these, if BSkyB and BT reach the limits of what they are willing to pay, there would be an opportunity for even larger corporations such as Google, Apple or Microsoft to acquire the most appealing sports broadcasting rights and change the content distribution model again (Evens, Iosifidis and Smith, 2013).

The large portfolio of international rights acquired by Al Jazeera (often trading as beIn Sports) has also been noticed. As an international live sports director, interviewed in 2013, points out: "Al Jazeera, Google and Microsoft could not only buy sports rights, they also have their own technological gateway via their own devices". As the largest multinational players operate across borders then broadcasting rights could be purchased for key territories, or for all distribution, both UK and international, or even for the purposes of warehousing them.

### **Polarisation in sports content provision**

Despite the efforts of media regulators and competition authorities from the UK and the EU, the evidence suggests that only the biggest and best-funded pay-TV broadcasters and Telcos – in the case of the UK, currently BSkyB and BT Sport – or the biggest transnational corporations are able to acquire live sports rights, such as the Premier League and the UEFA Champions League, neither of which are included on the protected list of events.

As the battle between BSkyB and BT Sport continues, the market is effectively split, leaving the contest for major events (where access is ensured via the list of protected events), highlights packages and what might loosely be determined as second tier sports providing realistic targets for the BBC, ITV, Channel 4 and Channel 5. However, for the UK's free-to-air terrestrial broadcasters the ability to deliver large audiences and offer a shared viewing experience retains considerable value.

As the BBC competes against well-funded rivals, Barbara Slater, the BBC's director of sport, accepts there is a "new reality" in the market for live sports rights (Gibson, 2012). Despite the successful presentation of the London Olympics, 2012 was a challenging year for the BBC. It lost its horse racing rights to Channel 4, and, after 10 years coverage, MotoGP rights were lost to BT Sport. It also re-positioned its Formula 1 coverage as a junior partner to Sky Sports. In terms of organisation, when the sports department relocated from London to Salford it shed 43% of its staff. And, as part of the BBC's overall Delivering Quality First initiative, the sports rights budget was cut by 20% (Gibson, 2012).

Slater recognises the disadvantage the BBC carries by having a finite income that, in real terms, is reducing over time. The corporation is also challenged, in so far as it cannot monetise expensive broadcasting rights via subscription charges or by attaching sponsorship or advertising to content in the ways its competitors can (Gratton and Solberg, 2007). In view of the BBC Charter renewal (due in 2017) then the BBC may need to target which rights it can realistically secure, for example coverage of the Wimbledon Lawn Tennis Championships was prioritised over retaining full Formula 1 coverage. In its defence, Gibson (2014b) argues that London 2012 was hugely important in defining the BBC's role as a home for communal viewing in the digital age. The ability to reach large audiences is the BBC's defining characteristic, particularly the presentation of global events.

Recently ITV has also seen its portfolio of sports broadcasting rights reduced, losing FA Cup coverage and, from 2015, the UEFA Champions League and Europa League. World Cup Finals, for football in 2014 and rugby union in 2015 are the remaining highlights. In 2013 Channel Four acquired broadcasting rights to major horse racing events in the UK. Produced by IMG Sports Media across 90 racing days, 73 are reported to have suffered a drop in viewers over the previous year (Cook, 2014). However, Channel Four received a favourable response to its coverage of the 2012 Paralympics; this represented a considerable commitment to an event that, previously, had not received a great deal of primetime coverage. Viewed in conjunction with the BBC's Olympic coverage, plus world cup finals in football and rugby illustrates the benefits of greater prominence for major event coverage on terrestrial television. Absent from the list of broadcasters with major events is Channel Five. Whilst there will be intermittent

skirmishes that may yield a sports rights win, or a coverage/highlights share with Sky Sports or BT Sport, there is little evidence to suggest the continued migration of live sports coverage towards pay-TV in the UK will slow down. As a senior executive from the BBC but now at a major independent sports producer summarises:

In the early 1990s the BBC had everything. There were tears in the corridors when rights were lost. Now the [BBC] sports department is much smaller, the BBC has lost a load of rights. A lot of their main stuff is now made by independent producers. Sky has changed the overall view of what is acceptable, Channel 4 continues in much the same way and ITV even has its own sports channel in ITV 4. The biggest difference is that there are a lot more people drinking at the fountain, whereas it just used to be one person. (Senior executive, independent sports production, 2013)

Asked to look ahead, a senior manager who has worked at both the BBC and Sky Sports adds:

I think the World Cup Finals and Olympics will continue on traditional free-to-air television for a long time... Will the World Cup Finals or Olympics be on Sky Sports soon? No. In 20 years, possibly, but not even in the medium term let alone the short term as the major events are all protected. But this will change. (Senior manager, ex-BBC and BSkyB, 2013)

The BBC's director of sport, Barbara Slater, defends the role of free-to-air broadcasters in this quote:

We have got a very peculiar intensity of competition between Sky and BT, leading to extraordinary hikes in price for certain properties. But there is a place for free-to-air. I think you take your sport off free-to-air television at your peril... It's about your new audiences and your future audiences. To create heroes, they need to be seen. (Gibson, 2014b)

The cornerstone of the BBC's PSB remit - delivering important sporting events to a national audience (Boyle and Haynes, 2000:69) - is echoed in Slater's comments. Slater claims that while BBC Sport accounts for 2% of sport output in the UK it attracts 40% of the viewership (Gibson, 2014b). What the 40% of viewership watch is not specified but is likely to include major events that benefit from the shop window effect the BBC still offers. However, as the BBC faces further scrutiny of the value it provides for £3.5 billion leading into the charter renewal this is a critical period. Gibson (2012) notes that cuts to BBC sports presentation draws concern from powerful sports organisations, including the IOC and The Royal and Ancient<sup>101</sup>, so what sports choose to remain committed to the BBC despite its access to larger audiences is another matter.

But this is not the only challenge. The influence of a small group of specialist advisers and, particularly, the advance of federation-based coverage of major events are significant developments.

### **A small world: special advisers**

A consequence of the current intensification in competition for the most appealing sport rights is the apparent reliance on a small group of, mostly male, advisers. Selling its broadcasting rights, the Premier League has received advice from specialist firms including DLA Piper and Reel Enterprises (part of the Wasserman Group since 2011). The current BT Sport chief Marc Watson previously worked at Reel as a *seller* of sports rights. Watson is now a *buyer* of rights for BT Sport (Sweney, 2012). As a participant-observation over recent years I have noticed how leading

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<sup>101</sup> Organiser of the Open Golf Championship.

company executives, like Watson, are attributed with specialist operational knowledge of the sports broadcasting rights business. The list includes a number of former BSkyB executives: Sam Chisholm (who negotiated the original Premier League deal for the newly merged BSkyB), Dave Hill (who became CEO of the Fox Sports Media Group after leaving Sky Sports<sup>102</sup>) through to recent BSkyB CEO Tony Ball. Having left BSkyB, Ball, hired as a non-executive director, then advised BT on its sports rights acquisitions including the Premier League. Additionally, there are legally trained rights negotiators including Simon Johnson, formerly of ITV Sport who subsequently joined the Premier League. Whilst the increased activity in specialist consultants is broadly in line with corporate activity, the movement from one side of the table to the other – primarily from television sport to senior positions at the leagues and federations - provides evidence of how boundaries are becoming more fluid.

For example, two people I have worked with include former controller of BBC Sport (and former Channel Four sports commissioning editor) Mike Miller, who after leaving the BBC, spent 10 years (until 2012) as chief executive of the International Rugby Board (IRB). Miller is attributed with negotiating rugby union's inclusion in the 2016 Olympics<sup>103</sup>. Similarly, the Football Association (FA) turned to a former controller of BBC and ITV Sport, Brian Barwick, as its chief executive between 2005 and 2008. In January 2013, Barwick became chairman of the Rugby Football League, again suggesting that sports federations value senior managers with direct

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<sup>102</sup> Hill moved from supervising Sky Sport's Premier League coverage to taking charge of Fox's NFL coverage as executive producer.

<sup>103</sup> In 2013 Miller became the first chief executive of the World Olympians Association.

broadcasting experience. As broadcasting is often a primary source of revenue this makes sense.

However, an entirely new phase in sports television production is associated with television executives moving to federations. Bernie Ross had been an executive producer with IMG Sports Media working on the early stages of the Premier League's international output, plus major event international coverage for FIFA and UEFA. In 2006 Ross joined UEFA as head of TV production, to plan and implement the host broadcast of UEFA EURO 2008. This was the first time UEFA had taken the television production of the tournament in house to produce the international feed. This was a significant step.

Also of note is John Rowlinson, previously a senior executive at BBC Sport. In 2002 Rowlinson moved from the BBC to the All England Lawn Tennis Club (AELTC) at Wimbledon before becoming its director of television. In 2009 Rowlinson was hired by the London Organising Committee (LOCOG) of the 2012 Olympics as head of broadcast for the International Broadcast Centre (IBC). The IBC was the home of Olympic Broadcast Services (OBS) during the Games and was the base for around 15,000 media workers linked to rights holding broadcasters (Sweney, 2009b).

In the small world of television sport an even smaller group of power players has developed where a few male, mostly former television executives have come to wield a considerable amount of influence. One of the most significant steps is for federations to take charge of the television

coverage for their own events, rather than depending on local national broadcasters to provide this service.

## **7.2 Federation run host broadcast operations**

Since around 2005 FIFA, the IOC and UEFA have set up their own host broadcast operations for major sports events, replacing the role previously held by the host nation's national broadcaster. The line between what is best for the sponsors and advertisers wooed by the federation's promises of sympathetic coverage and the final television output *also* provided by the federation is neither straight nor straightforward. This significant development is considered.

At all major global sports events, the International Broadcast Centre (IBC) is a bespoke technical and broadcast hub used for broadcast operations and rights holding broadcasters (RHBs). Coverage of each individual event is routed to the IBC's central media servers where content can then be accessed by rights holding broadcasters before being uplinked to their respective territories for broadcast. The International Broadcast Centre model can be viewed as an extension of the Premier League Productions workflows and UEFA Champions League Production Manual conditions discussed in chapters 4 and 5.

Funding for the planning, construction, engineering and equipping of the IBC is provided by the LOCOG and/or Olympic Delivery Authority (ODA) but can also be privately funded, either way the costs are not carried by the

IOC or FIFA. Gibson (2009) places the cost of the 2012 London Olympics International Broadcast Centre at £355 million.

### **OBS, IOC and OTAB**

Olympic Broadcasting Services (OBS) is based in Madrid. Created by the IOC in 2001, the company specialises in covering multi-sport events according to its website: "to serve as the host broadcaster organisation for all Olympic Games, Olympic Winter Games and Youth Olympic Games" (OBS, 2013). The online explanation continues:

The Host Broadcaster is responsible for delivering the pictures and sounds of the Olympic Games to billions of viewers around the world. It produces and transmits unbiased live radio and television coverage of every sport from every venue. This feed is called the International Signal or the World Feed.

In this role, OBS is responsible for developing a consistent approach across Olympic operations while at the same time optimising resources to continually improve the efficiency of the Host Broadcast operation.

OBS does so to ensure that all IOC contractual obligations are fulfilled and the Games' Rights Holding Broadcasters (RHBs) are satisfied with the overall television production of the Olympic Games." (OBS, 2013)

Local broadcasters are no longer responsible for providing coverage, although they may, as sub-contractors, still contribute to the overall OBS operation. It can be argued that the main beneficiaries are not the rights holding broadcasters, but the IOC's highly developed programme of preferred global sponsors - TOP. Consequently, the extent to which OBS

coverage can be considered unbiased is open to question. In terms of providing coverage that is sympathetic to sponsors and advertisers, then the role of Olympic Broadcasting Services introduces another level of control on behalf of the IOC by removing an *intermediary*, the local broadcaster. A senior producer who worked on several Olympics looking after international output for the IOC explains the role of digital technology in allowing Olympic Broadcasting Services to take control of operations:

Between 2000-2004 we had access to all IOC content, we made the programmes, including highlights, and sent them out to the RHBs [rights holding broadcasters]... By 2008 OBS [Olympic Broadcasting Services] via their central server at the Beijing IBC had total control. Everybody now worked under the OBS umbrella. Everything is done according to the Manuals you are given; it's all pre-conceived so you have very little leeway in what you can possibly produce. I would place the watershed for this change at around 2005. (Senior sports producer, independent sports production, 2013)

To better understand this critical shift we need a benchmark. Prior to 2005 the IOC contracted IMG Sports Media to provide international production services for rights holding broadcasters. Between 2000-04, IOC library managers at IMG would receive feeds of all event coverage routed from the venues, Sydney and then Athens. A senior sports producer involved in production picks up the story:

The feeds would come in; they would be recorded onto digital tape where they would be logged so that producers could find what they wanted from the library. From 2008, and Beijing, the operation had gone entirely digital. There was a big server in Beijing, everything was fed into that and all rights holders could come and pick up what they wanted. Tape

storage was no longer relevant. (Senior sports producer, independent sports production, 2013)

It was a similar story with FIFA and Host Broadcast Services (HBS) as an executive producer with significant major event experience recalls:

The first time I encountered central media servers at a major event was the 2006 World Cup Finals in Germany. Rights holding broadcasters had a meeting each day where Host Broadcast Services (HBS) would say what was available in the central pot. The technology has been around for a while – it was around in Japan and South Korea in 2002 - Host Broadcast Services will be in charge again in Brazil 2014. (Executive producer, independent sports production, 2013)

By the middle of the decade federations had taken charge of host broadcast operations and, using central servers and digital workflows, produced an international feed used by all rights holding broadcasters.

For the IOC there were two important outcomes: (1) the IOC, via Olympic Broadcasting Services, now had much more control of its own material, including how the coverage looked, who could access it and a detailed log of what material was used; and (2) the IOC no longer needed to contract a company like IMG Sports Media to carry out its international production operations, although IMG was retained to run the Olympic Television Archive Bureau (OTAB). OTAB manages the commercial processes of licensing Olympic footage and all IOC symbols. As the OTAB website says:

Ultimately we are involved with your project from the conception of your ideas to the final cutting stage, so we can service all your requirements from sourcing of Olympic content,

the licensing and rights clearance stages to the final approvals of the production. (OTAB, 2013)

The OTAB explanation is indicative of increasing supervision for the use of *all* IOC material. Returning to Olympic event coverage, Olympic Broadcasting Services subcontracts production of each Olympic event (sport) to individual specialist producers, or to national broadcasters that may have expertise in specific event coverage. So, for the London Olympics the BBC becomes one contractor (albeit a large contractor) among others that were hired by Olympic Broadcasting Services to cover the entire range of events and to produce a sympathetic feed with consistent production values. The removal of national host broadcasters from *coverage* of Olympic events leaves them free to focus on the *presentation*, or localisation, of the Games for their own national audiences.

To illustrate the extent of control exerted by Olympic Broadcasting Services as a participant-observer I was aware of an example from 2008. A senior producer, a fluent Mandarin speaker, and an executive producer who were in Beijing working on the Games corroborate this account. In 2008 the best canoe slalom director had twenty years experience of covering the sport and was based at Slovenian television. The director, Stane Skodlar, and his team were brought in by Olympic Broadcasting Services to cover the white water canoe slalom event at the Beijing Games. However, Skodlar was presented with an OBS manual explaining exactly how to direct the slalom coverage. With no room given to interpret these instructions the director's expertise was redundant, although his name was still attached to coverage

that, in his words, “could have been directed by anyone”. Conversely, and again through experience as a participant-observer, in 2013 I was aware of a senior producer attributed with coverage of the dressage event at London 2012. When IMG hired this director to help with a proposed dressage event in Qatar it turned out that his knowledge of outside broadcasts and directing the event was limited – he had simply followed the instructions provided by Olympic Broadcasting Services in their manual for dressage coverage.

Whilst the television departments at the IOC, FIFA and UEFA are now far more instrumental in defining exactly how productions should look and sound – as expressed in their detailed production manuals – at least some senior television executives believe that federations cannot do everything themselves:

Federations do now get control over their events, but they still need to hire people to do the production work for them. The federations will determine how it is seen, where it is seen and how much they charge. But they still need cameramen and directors [to cover events]. (Senior executive, independent production, 2013)

In other words, the federations require producers hired on short-term contracts (preferably assured by companies like IMG or a recognised national broadcaster). But, with the need to comply with the specifications set out in the manuals and so deliver approved coverage, the function is increasingly one of painting by numbers. It should also be noted that federations increasingly police the quality of final coverage provided to ensure it complies with the requirements set out in the production manuals.

A senior manager with extensive experience working for broadcasters at major events concludes:

Some Olympic events, like the marathon, will always look different because the setting changes every four years. But for many other events, yes, they are all becoming more prescriptive. (Senior manager, independent sports production, 2013)

An experienced live sports director adds:

The Olympics gives a very clear instruction about what is and is not allowed... It's all linked to commercial obligations as sport becomes more commercialised. Federations and organisations need to protect those relationships and that's one way of doing it. (Live international sports director, 2012)

Increasing prescription and conformity is the price of the IOC seeking totally dependable television coverage.

Another aspect of the dependability of international television coverage is more prosaic, but also a factor. This involves providing clear cue points throughout the broadcast timeline, so that rights holding broadcasters, working in different time zones around the world, can opt in and out of the international feed when they want to. This is a very similar procedure to the UEFA Champions League Production Manual multilateral running orders discussed in chapter 5. Directing live sport to a defined and pre-determined timetable whilst adapting to unpredictable outcomes within these parameters leaves little or no leeway for interpretation. No surprises are required.

According to all the expert contributors interviewed, the outcome is an Olympic television product that is subject to increasing control by Olympic Broadcasting Services on behalf of the IOC. This television product receives an injection of local colour and tone every four years but, essentially, the aim is to achieve consistency, avoid controversy and any surprise material such as ambush marketing that would offend or otherwise compromise sponsors and advertisers spending significant sums to be associated with the Olympic movement. With no advertising allowed inside Olympic venues – unlike perimeter advertising in football – the IOC, according to a senior producer with experience of 3 Olympics (related in 2013) “are desperate to avoid ambush marketing in and around the stadia”.

Given the production prescriptions and preferred workflows now set out by Olympic Broadcasting Services, it appears to make less and less difference who actually directs event coverage, whether it is individuals, independent production companies or national broadcasters with specific expertise. Since the mid-2000s the use of new digital technology has provided the IOC and Olympic Broadcasting Services with a quantum leap forward in their ability to control much more of their own output.

The rise of the global sports event was discussed in chapter 3, but looking at the Olympic movement since Sydney 2000, Magdalinski *et al* (2005), argue that the Games now represent the incorporation of sport into multinational advertising and marketing strategies. They state:

This partnership between sponsors and the movement has solidified the rapid process of commodifying the Olympics as a ‘product’ and has established a clear link between the

future success of the Olympic movement and leveraged its ability to attract capital funding from external supporters. (Magdalinski *et al*, 2005: 46)

Recalling Gruneau and Cantelon (1988:347), the Olympics has been transformed into an increasingly market-oriented project where there is “a more fully developed expression of incorporation of sporting practice into the ever-expanding marketplace of international capitalism.” In practice, this can be reduced to (a) taking control of television output to provide dependable and sympathetic output suitable for consumption worldwide and (b) the ability to exclude any and all material that might in any way compromise the IOC or TOP members. The IOC is now the gatekeeper and its own regulator.

### **HBS, FIFA and UEFA**

UEFA took significant steps to extend its control of coverage of the Champions League and Europa League via the production manuals it issues as a key part of broadcasting rights agreements (see chapter 5). In comparison to multi-sport events like the Olympics, top football tournaments feature a single sport with a limited number of games – Brazil 2014 featured 64 matches – so, in many respects, they present slightly less challenging logistical circumstances. Television output from international football tournaments, including the FIFA World Cup Finals and the UEFA EURO Championships is now supervised by each federation’s television department working with Host Broadcast Services (HBS) in ways similar to Olympic Broadcasting Services on behalf of the IOC.

Host Broadcast Services (HBS) was founded in 2000 and is fully owned by Infront Sports and Media, a sports rights and marketing company based in Zug, Switzerland. The Infront company profile claims it is “helping to transform the industry” (Infront, 2013:1) by “targeting sport at the core of an ever growing and widening matrix of the entertainment industry” (Infront, 2013:3). The inclusion of sport as another element of the entertainment industry is not in question (Whitson, 1998; Boyle and Haynes, 2000). Host Broadcast Services (HBS) was established to produce the television and radio output for the 2002 and 2006 FIFA World Cups. On the HBS website the company profile page states:

HBS is responsible for producing the multilateral coverage and providing unilateral production, transmission, commentary facilities and associated services for world broadcasters at the FIFA World Cup™. To achieve this, HBS designs, builds, installs and manages an International Broadcast Centre (IBC) and the multilateral and unilateral broadcast facilities at every venue in the host country. (HBS, 2013)

Host Broadcast Services influence has increased since the 2006 FIFA World Cup Finals in Germany. The objective is to take control of every aspect of production, “from pitch to the active viewer” (Infront, 2013:15). Host Broadcast Services seeks to control everything to do with the international feed and its distribution globally via satellite. To paraphrase: work begins with an audit at the venue to establish local resources and delivery needs. Host Broadcast Services is responsible for planning, building, managing and dismantling the International Broadcast Centre as well as providing the multilateral and unilateral on-site broadcast facilities at all venues (HBS,

2013). In addition to the international feed the unilateral requirements of rights holding broadcasters including unilateral production, transmission, commentary and on-site production services (such as editing and archive provision) are provided by Host Broadcast Services. HBS also provides what it intriguingly calls “knowledge management” as well as “legacy archiving”. This is simply information and media archiving activities undertaken when the organising federation does not already provide these services.

In comparison to the Olympics, a World Cup Finals tournament generates around 120 hours of football, so the volume of media should be easier to manage (although by the time various match feeds, isolated camera angles and EVS feeds are added this volume increases dramatically). An innovation pioneered by Host Broadcast Services is embedding an individual producer with each World Cup Finals team. The HBS producer works exclusively with the assigned team to access news stories and provide profiles, features, interviews and updates that will be made available to all rights holding broadcasters via the central media server for use in their own presentation as required.

Hidden from immediate view is how Host Broadcast Services and Infront now operate *together* to control many critical aspects of event staging and television presentation. Reviewing HBS and Infront websites, plus Infront (2013) their activities embrace:

- Event positioning, brand development and promotion.
- Individual company sponsorship strategies.
- Event management, venue dressing and signage, including LED venue advertising solutions.

- Hospitality, catering, accreditation and ticketing services.
- Media rights sales.
- Coordinating broadcast coverage and digital asset management, including longer-term archive management and clip sales.
- Creating digital communications platforms for media, brands and products.

Recalling Patrick Nally's influential *Intersoccer* template (Nally, 1979), since the mid 2000s FIFA and UEFA, working closely with Host Broadcast Services, have taken decisive control of all aspects of major international football tournament coverage. As has been the case in other examples, from the Olympics to Premier League Productions, it is a combination of factors that have enabled this move, including: (a) powerful media servers, (b) the ability to move large amounts of media between locations, (c) the capacity for numerous rights holding broadcasters to access the same source material simultaneously and (d) produce and distribute different outputs, and (e) the ability of federations to provide approved coverage of their own events for international consumption via localised presentation provided by rights holding broadcasters. An important part of approved coverage is guaranteed protection and enhancements for key sponsors and advertisers.

Considering the rapid development of the host broadcast operations by Olympic Broadcasting Services and Host Broadcast Services, in addition to new content distribution models – like the Premier League's full channel service available in more than 200 territories, plus excursions into bespoke broadcast channels by the NBA and NFL (with both organisations retaining

established production arms in *NBA Entertainment* and *NFL Films*) - there can be little doubt that the downstream television operations provided by the leagues and federations has entered an important new phase. In 2014 the precise relationship between these new federation-run television operations and competition authorities and media regulators remains unclear.

Reviewing developments in conjunction with a perceived lack of accountability on behalf of the IOC and FIFA, and fed by allegations summarised by Jenkins (2014), leads to questions about purpose:

These organisations' staff travel the world like heads of state. They require more lavish facilities and kowtowing. They must stay free at hotels, be greeted by presidents and prime ministers, have armies and navies on hand to guard their ceremonies, and have domestic markets rigged for their sponsors' products. Roads must be closed for their limos and traffic lights phased to green. The politics of host nations are of no concern to them. No one calls these bodies to account, because they claim a higher licence from the great god of sport.

(Jenkins, 2014)

As discussed in chapter 2, Falcous (2005) identified a triangular alignment of corporate, media and sport interests and how this accelerated phase has resulted in sport being linked with more instrumentally rational approaches to capital accumulation. But, where do these developments leave broadcasters?

### **7.3 More scope, less criticism; even more media and coverage versus presentation**

Considering the challenges facing broadcasters engaged in fierce competition to acquire sports broadcasting rights at the same time that federations have taken control of producing their own international feeds, three trends are worth reviewing: (1) whilst the volume and scope of output has increased dramatically, criticism (of leagues and federations) remains minimal, (b) yet more content is provided as broadcasters engage with viewers via the red button, online and second screen applications and (c) the extent of the split between the coverage and presentation in television sport.

#### **More scope, less criticism**

Even a brief review of channel schedules suggests that *all* broadcasters are engaged in eking out as much value as they can from their sports broadcasting rights. Sky Sports, for example, has its own strategy department dedicated to maximising value under an overall “vision to be the world’s best sports business”<sup>104</sup>. Looking across sports television output in early 2014 it is apparent that a much wider scope of output has emerged, this now includes:

- a) Live sports coverage.
- b) As-live sports coverage (coverage routed through EVS with several minutes delay built in, for example NFL coverage on Sky Sports).
- c) New made for television sports (*Fight Night, UFC, Premier League Darts*).

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<sup>104</sup> Taken from a recruitment advertisement for strategy manager, Sky Sports: [http://www.grapevinejobs.com/executive\\_mediajobs/42641,Strategy\\_Manager\\_Sky\\_Sports.html](http://www.grapevinejobs.com/executive_mediajobs/42641,Strategy_Manager_Sky_Sports.html), accessed 04.12.2013

- d) Magazine presentation (live, as live and highlights usually presented via a studio, for example *Match of The Day* offers a 3<sup>rd</sup> edition for the 2013-14 season).
- e) Stand-alone highlights (usually sport-specific, like Ashes Test cricket).
- f) Weekly review and preview programmes.
- g) Discussion formats (some formats featuring a panel of journalists, others with players, ex-players and coaches).
- h) Sport-celebrity vehicles (Sky One's *In a League of Their Own* and *Jumpers for Goalposts* plus the BBC's *They Think It's All Over*).
- i) Traditional sports quizzes (BBC's *A Question of Sport*).
- j) Sport-celebrity feature programmes (access-based lifestyle films. Trace Sports Stars offers a whole channel of lifestyle-oriented content).
- k) Sports documentaries (from Sky's *A Year in Yellow*, to one-off films on ITV 4 and a documentary strand on BT Sport).
- l) Fanzine formats (*Soccer AM* and *Fantasy Football*).
- m) Archive-based formats (*Premier League Years*, *Football Gold*, *Football's Greatest*, *Sports Greatest*, *Premier League 100 Club*).
- n) Personality interviews (often ad hoc and offered around a product launch).
- o) Chat shows (host plus guests, previously BBC's *On the Line*).

Sky Sports News has a dedicated channel with its own signature event, the closing stages of the football transfer window. Within football coverage general discussion is not limited to the Premier League and its fixtures, but is focussed more specifically on mini-leagues *within* the league – for

example, the race for the title, the battle for European places, bragging rights in local derbies and the fight for survival (the avoidance of relegation) at the bottom of the league. This has been noticed in research:

But even in an unequal league, like the Premiership, our results imply that the modern creation of 'leagues within leagues' permits many games to generate extra interest because they 'matter' for some issue or another. (Forrest, Simmons and Buraimo, 2006:99)

With 154 matches broadcast per season (116 on Sky Sports and 38 on BT Sport, 2013-16) creating reasons to watch is not surprising. However, generating more scope can involve adopting overtly entertainment-based production values, the BBC's *Sports Personality of the Year* provides an example. In the early 1990s, when the BBC still retained the majority of sports rights, the popular annual review programme was titled *Sports Review of the Year*. Today, the programme has been rebranded and on 15.12.2013 it celebrated its sixtieth anniversary. The new format is a glittering sports-celebrity-awards show, complete with an entertainment style floor and lighting rig. The sports action clips are sourced from a variety of broadcasters.

The crossover between sport and entertainment has also generated a range of celebrity-sports-entertainment formats. These are often prominently positioned in schedules and include:

- *The Jump* (Channel 4), a celebrity contest based around several winter sports aired in January 2014 ahead of the Sochi 2014 Winter Olympics (BBC).

- *Splash* (ITV) a celebrity diving challenge featuring 2012 Olympic bronze medalist Tom Daley also broadcast in January 2014.
- *Dancing on Ice* (ITV) featuring Winter Olympic gold medal winners Torvill and Dean, broadcast in early 2014.
- *Olympic Superstars* (BBC) a specially staged television tournament post-2012 Olympics<sup>105</sup> aired as a Christmas special.
- *The Match* (Sky) a celebrities versus retired professional footballers challenge match – 3 series with additional support programming.
- *The All Star Cup* (Sky One), a celebrity version of golf's Ryder Cup.
- *Famous and Fearless* (Channel 4), 8 celebrities in a multi extreme sport challenge broadcast in early 2011.

In summer 2014 the BBC launched *Tumble*, a new celebrity gymnastics format featuring 2012 Olympic silver medallist (and BBC *Strictly Come Dancing* champion) Lewis Smith and Nadia Comaneci, the first gymnast to score a perfect 10 in competition. In purely economic terms there is some appeal to creating formats that do not incur the considerable rights fees attached to elite professional sports events. If successful these new formats can be reformatted for international sales generating further income. Usually made by entertainment producers, these formats are not considered as replacements for regular weekly sports coverage but act more like special offers used to attract viewers to the channels, somewhat like special events including Olympics (Fikentscher, 2006:85).

Whilst the scope of sports television output has increased substantially critical comment is harder to find. The few programmes that might hold FIFA or the IOC to account are distanced from sport output and broadcast

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<sup>105</sup> Channel Five had re-launched the IMG owned Superstars format in 2008.

under current affairs strands like BBC Panorama<sup>106</sup>. More typical of the current climate is an example from January 2013, when ESPN issued a statement implying that one of its commentators, Jon Champion, had wrongly labelled a Liverpool player, Louis Suarez, as a cheat for using his hand in a live FA Cup match. Champion said: "That, I'm afraid is the work of a cheat" (Gibson, 2013). ESPN, which was in the third of a four-year deal to show FA Cup matches, distanced itself by adding:

We take our responsibility to deliver the highest standards of coverage to our viewers.

ESPN's editorial policy is for commentators to be unbiased and honest, to call things as they see them. Inevitably this can involve treading a fine line on occasion, especially in the heat of the moment. (Gibson, 2013)

Evidently such lines are even finer when important sports broadcasting rights are due to be renewed. Limited discussion of some issues – like foreign ownership of football teams, player wages, Financial Fair Play rules or even constantly changing kick off times – can be found on radio particularly via listener phone-ins. However, comments still may not draw much of a challenge: on 22.12.2013, the Premier League's chief executive, Richard Scudamore contributed to Gary Richardson's BBC Five radio show. Asked to outline Premier League activities in 2014 Scudamore said the first priority would be to "protect the Premier League's intellectual property rights worldwide". Scudamore did receive some scrutiny in May 2014 when emails he wrote containing sexist comments were released. However, despite dominating the agenda elsewhere, Sale (2014) reports the story was practically ignored by Sky and News International newspapers. As

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<sup>106</sup> The journalist Andrew Jennings has campaigned against corruption at FIFA for several years, including programmes for Panorama, see Jennings (2006) and a critique of the IOC in Simson and Jennings (1992)

television's protection of the culture of sport serves to maintain the hegemonic position it enjoys with sport, so Boyle and Haynes (2000:107) see an obvious reason to avoid criticism: television knows "that it must not kill the goose that lays the golden eggs". For Perelman (2012) the situation appears to be worse:

We are not just witnessing an increased mediatisation of sport, but mediatisation deployed – *decreed* – by sport itself, in whose influence the media is steeped through and through.

(Perelman, 2012:89)

From a Marxist stance, Perelman sees sport as having expanded across the planet leading to its successful and nearly complete globalisation – as "an irresistible power it has no equal" (Perelman, 2012:109). With all critical positions excluded from mainstream discussion: "sport as an institution today is the vanguard of non-criticism" (2012:110).

### **Even more media**

Another contemporary trend sees broadcasters emphasising alternate means of viewing their sports content. In some ways this is part of a pattern where ever more volume and scope of content is offered. Various forms of content linked to innovative means of viewing can also be used by broadcasters as a point of differentiation in their marketing manifestos. This content also represents further commodification of sport as a media product, (Boyle and Haynes, 2004).

Enhanced or interactive viewing essentially falls into 3 areas:

- 1) Additional coverage that supplements the primary channel output, usually broadcast behind the red-button accessible via a TV remote

control. Content ranges from adding a cockpit camera in Formula 1 to alternative match choices for football such as Champions League on Sky Sports.

- 2) Associated content streamed on the Internet, usually via a linked website, and ranging from clips to lengthy streams of events, for example coverage of more specialised Olympic events, like Judo.
- 3) Second screen or social media; a range of dialogues taking place parallel to the main coverage. Twitter, for example, is used by broadcasters to give the appearance of being connected to their audiences.

Particularly since London 2012, the BBC has offered what director of sport Barbara Slater describes as the “deeper experience” for viewers (Gibson, 2014b). Slater argues that viewers want the communal, shared moments of seeing big event coverage live on television, but they also want an option to customise their experience and “go deeper” via online access. For the Sochi 2014 Games two interactive streams were available behind the red button and six more streams on the BBC video player available on all viewing devices. The BBC sees this added value as a major point of difference it provides to viewers.

For BSkyB enhancements such as on-demand, Sky Go, and its EPG interface have been drivers in creating customer loyalty and form a significant part of the company’s promotional activities – “expect more” to quote a 2014 campaign phrase. As discussed, BT Sport, via its fibre broadband services, is making a case for converged media. Doyle (2002:20) argued that, ultimately, there will be no difference between

broadcasting and telecommunications. However, the extent to which these services have taken off is open to question.

The idea of immersive viewing was introduced first by Sky Sports, as an experienced live director explains:

In terms of immersive and social viewing, Sky Interactive did this 10 years ago, by offering a choice of different camera angles via the [television] remote control. Viewers could access statistics and Hawkeye too, so that's all been around as an enhancement for a while. The new thing is "talking about sport" are viewers interested in what other viewers are saying? More people are checking this out before expressing an opinion. (Live sports director, Sky Sports, 2012)

The option to use match choice via the red button is well established and a consequence of greater capacity in the digital spectrum. As part of sports presentation, the inclusion of Twitter and Facebook, for example, on top of SMS and email has risen substantially over the past 5 years. But just how important or relevant this may be is open to debate; a respected executive producer with broadcaster and independent sports experience offers this view:

90% of all viewing is still via television. Digital and mobile [consumption] is still only 1 in 10 people – I think this will continue for a long time. World Cup Finals and Olympics will be on traditional free-to-air television. Twitter, connected TV and so on, it's really important in pitches, but come the interview it never gets mentioned, broadcasters want to know what we will see on the main screen. Broadcasters pay lip service, but I think they know in their heart of hearts what drives this business. (Executive producer, broadcaster and independent production, 2013)

To what extent the current preoccupation among broadcasters with alternative means of delivering content and generating viewer discussion is a passing fashion, or is part of a genuine shift towards convergence and more customised viewing habits remains to be seen as there is simply not enough evidence to draw any meaningful conclusions at this time. In addition to the difficulties in raising revenue from these new platforms an experienced senior producer expresses a widely held view among producers interviewed and one that reflects the dramatic increase of scope in sports content more generally:

I'm not convinced you can slice up events much more. The Olympics is different as it has so much [action that] you might want to see it all... Formula 1 cockpit cam, no one is really bothered, or different angles of football coverage you can chose from your own seat, but covering football *differently*, that might be interesting. (Senior sports producer, independent sports production, 2013)

As the organising federation defines match coverage from major football tournaments, any significant changes appear to be unlikely. But, how many more ways sports content can be recycled and re-broadcast is a relevant question; it is also one that federations have been considering. According to an executive producer at a large independent sports production company speaking in 2013: "it is certainly not clear that federations have, so far, fully grasped the dynamics of this new landscape." That leagues and federations are unclear about how they want to engage with newer aspects of digital media tends to fuel confusion. As an observer-participant, I have experienced how leagues and federations can be very clear about many of their production activities (via production manuals), but away from primary

coverage and website support they are much less sure about how to proceed – e.g. online, on social media. Following a tender for production services in late 2012<sup>107</sup> the IOC decided to experiment with their own dedicated *You Tube* channels during 2013. The IOC decision came from its marketing department suggesting such activities are part of promotional strategy rather than fully integrated with their broadcasting plans.

Returning to broadcasters, with output largely defined (a) by the rights a broadcaster holds, (b) federations providing coverage of major events and (c) due to an increased volume of sports coverage originating in other countries but broadcast in the UK – for example Spain's La Liga, Germany's Bundesliga and Italy's Serie a – broadcasters face a further challenge in differentiating their product as they move from providing original coverage to offering wrap around presentation of events.

### **Coverage versus presentation**

The presentation of television sport, as distinguished from its coverage, is a development worth noting. There has been a substantial increase in sports covered by one party – a league, federation or a local broadcaster – that is broadcast (essentially re-broadcast) by another.

The Olympics offers an example. As noted, Olympic Broadcasting Services, rather than the national broadcaster from the host country now provides coverage of the Olympics. For the BBC this means it has been able to focus more effort and resources on the presentation of the event.

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<sup>107</sup> Explanation provided as a participant-observer working at IMG Sports Media in 2012.

In addition to commentating on the coverage provided, the additional shoulder programming - including *all* presenting and reporting around the event - is an increasingly important aspect of broadcast output as it seeks to both localise and brand the generic international coverage provided by the federations. The precise division between coverage and presentation can sometimes be difficult to see as broadcasters like the BBC usually have some access (in their rights agreements) to additional unilateral feeds within the arena (in other words to cameras under the BBC's direct control that may be used to track specific UK interest, like a featured athlete) and they will certainly have cameras for their own presentation positions and for post-race interviews.

Although the change in emphasis from coverage to presentation may suggest limitations, or even a degree of passivity, wide variances in presentation style are easily found. For example, the BBC adopted a fairly catholic view of the Olympics, reporting widely on a whole range of events and competitors; it seeks to provide a reasonable overall picture. This contrasts sharply to NBC's presentation in the US. In my experience of viewing Olympic coverage in the UK and the US, the focus in the US is almost exclusively on US athletes. US presentation style often amplifies human drama and emotion (a story might report on a competitor who has recently lost a parent and dedicates their performance to this memory). These feature stories are highly produced, and, with coverage mostly time delayed to fit US network prime-time schedules, an altogether more

personal narrative is presented, mainly to the exclusion of stories that have little or no US interest. It is a narrower angle of view<sup>108</sup>.

The BBC underlined its commitment to presentation by securing prominent studio positions at London 2012 and, before that, in Cape Town for the 2010 World Cup Finals. In a main point of difference with the BBC's London 2012 semi-open studio vantage point, and use of exterior links in the Olympic Park, Channel Four chose a fully *enclosed* studio that did not provide the same immediate connection to the venue seen on the BBC. For Sochi 2014, it was noticeable that the BBC opted for an even more agile and informal presentation style with presenters linking from a variety of completely open locations – it was a more immersive style compared to a formal and closed studio presentation. A brief look at football (particularly UEFA Champions League) and rugby union coverage (on Sky Sports and BT Sport) reveals a trend for using pitch-side positions for at least part of the main programme presentation.

More generally, the primary presenters – the faces of an event like the Olympics – are carefully chosen, with teams of reporters and experts added to the onscreen line-ups. Although not responsible for coverage *per se*, the BBC had production teams of 295 at the 2010 World Cup Finals (Gibson, 2010) and a team of 765 for London 2012 (Gibson, 2012b). Presenting London 2012 to its UK audience, the BBC spent approximately £66 million (Sherwin, 2014).

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<sup>108</sup> Access to Internet reports meant many viewers already knew the results of London 2012 events, leading to criticism of NBC's approach.

The critical importance of determining presentation style is underlined by the intervention of Channel Four's chief creative officer when the final composition of the on-screen presentation team for coverage of the 2012 Paralympics was changed *after* the press launch – as relayed, in 2013, in an interview with a senior producer who was at the launch and involved in subsequent discussion.

Away from major events, more and more sports are bought in by broadcasters and presented via a studio, usually featuring a host and relevant guests – again, localising non-UK originated coverage for viewers. With 4 dedicated Sky Sports channels devouring 672 hours of content a week – and joined by a 5<sup>th</sup> channel in August 2014 - the necessity of bringing in additional content is apparent. Interviewing sports producers in 2012 and 2013 provided a snapshot of how many popular sports are now *presented* rather than *covered*. For example, European Tour Golf is covered by European Tour Productions, a joint-venture company owned by the Tour and IMG Sports Media. The same team produces Ryder Cup coverage when the event is held in the UK. For tennis, the ATP World Tour (the governing body of men's professional tennis circuit) has its own broadcast operation that provides an international feed to over 110 rights holding broadcasters, including BSkyB. Popular European football is covered by local broadcasters, including La Liga on Sky Sports, with the Bundesliga and Serie A carried by BT Sport. And NFL coverage comes from BSkyB's sister company Fox Sports and the other rights holding US broadcasters that provide game coverage. Presentation style was also a major selling point in the BT Sport launch, with promotional trailers featuring BT's large studio (previously the

international broadcasting compound for the 2012 London Olympics<sup>109</sup>) – virtually all of the launch trailers featured action specially shot in this distinctive space. Glendenning (2013) quotes BT Sport’s director Simon Green: “Without getting personal, the presentation of football hasn’t come on a huge amount in the last 15 years. We [BT Sport] think we’ll bring something different.” At the end of its first season of Premier League football any differences appear to be rather nuanced. In addition to the central hub design of the studio with its prominent monitor banks, the only innovation was the use of a small live box sometimes inserted in the corner of replays so nothing is missed during the time the replay is on screen.

Considering these brief examples, whilst more effort and resources are put into presenting sport, it is evident the main point of difference between broadcasters is the portfolio of sports rights that each holds. However, as major event coverage is increasingly provided by federations, with leagues issuing ever more detailed prescriptions for coverage and the need to fill a high volume of broadcast hours on multiple channels with additional sports content, then the individual presentation style each broadcaster chooses to adopt is important, not least because it remains one of the very few areas for which they still retain substantial control and, as such, has become a key part of their channel brand.

## **Conclusion**

Chapter 7 reviewed a range of challenges faced by broadcasters following the upstream transformations discussed in part two. These included: (a) the

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<sup>109</sup> Also used by IMG Sports Media and Sunset+Vine for Channel Four’s presentation of the 2012 Paralympic presentations.

close relationship between sports broadcasting rights ownership and the commercial performance of large media firms, (b) the emergence of federation-based host broadcast operations providing coverage for major events, (c) how increased demand for sports content has delivered very little critical comment and (d) a widening division between coverage and presentation, how broadcasters focus on localising and re-branding the international coverage they receive from federations via individual presentation and branding styles. The chapter reflects the continuing flow of power upstream to the leagues and federations.

Examples from BT Sport and BSkyB were used to examine how the commercial performance of broadcasters is linked to ownership of popular sports broadcasting rights. In an oligopolistic market structure, changes in sports broadcasting rights ownership can directly impact on the economic performance of competing companies; the growing significance of corporate performance also suggests the way in which sports broadcasting rights are valued is becoming increasingly complex. With the migration of many sports rights to BSkyB and BT Sport, a split in the market providing sports content was reviewed, including the possibility on encountering *winner's curse* and bidding too much in a market where rising prices for broadcasting rights shows little inclination of slowing down.

Further challenges for broadcasters arise as a result of (a) the influence of a small group of mostly male special advisers many of whom have moved from executive positions in television sport to work directly for the leagues and federations and (b) the emergence of federation run host broadcast

operations; Olympic Broadcasting Services and Host Broadcast Services in particular.

Enjoying commonalities with Premier League Production workflows (chapter 4) and the Production Manuals and shared international feed philosophy adopted by UEFA (chapter 5), the IOC, FIFA and UEFA seek to take control of *every aspect of production* to provide a dependable and sympathetic international feed to all rights holding broadcasters. In doing so, the line between what is best for advertisers/sponsors and broadcasters becomes more blurred. Research by Gruneau and Cantelon (1988) and Magdalinski *et al* (2005) notes how the Olympics have become “a more fully developed expression of incorporation of sporting practice into the ever-expanding marketplace of international capitalism” (Gruneau and Cantelon, 1988:347). This research argues that federation-based production is a very important new phase in television sports production.

Considering the significantly increased demand for sports content, including more volume and scope, and the introduction of formats that embrace more entertainment-oriented production values, there remains very little in the way of criticism in sports television output reflecting a reluctance to “bite the hand that feeds” (Boyle and Haynes, 2000:107).

The provision of *more* media remains a central theme as broadcasters try to engage viewers via the red button, online, mobile platforms and second screen activities (such as peer group dialogues). Whether this is a marketing exercise by each channel (providing added value), or indicative of a shift towards more customised viewing is unclear as there is insufficient

evidence to reach a conclusion. It was noted that federation activity in this area is comparatively underdeveloped.

As broadcasters respond to league and federation-based production activity that delivers approved coverage to all rights holding broadcasters, plus an increase in coverage originated by other broadcasters and bought in to fill schedules, then the importance of *presentation* in sports television has increased significantly. Whilst the BBC faces intense commercial competition to acquire rights, for protected events like the Olympics and World Cup Finals, the corporation has, with the rise of federation-based host broadcast operations, been released from providing comprehensive coverage of events. This has allowed the BBC to concentrate its efforts and resources on the presentation of major events, in other words the shoulder programming that wraps around international coverage and that serves to localise it. Presentation is also a means to differentiate broadcast output and to build a brand identity. The BBC has retained a plausible position as the broadcaster that can deliver a shared viewing experience for large numbers of British viewers. Presentation is one of the remaining areas where broadcasters still retain substantial control.

Continuing the supply side perspective in answering the third research question – what is the impact of pre-production process downstream - but moving now to a micro-level view of activities, contemporary trends in independent sports production and the day-to-day work of sports producers and directors are considered in chapter 8.

## 8 | Independent sports television production

Subject to considerable upheaval as upstream pre-production processes have tricked down to the supply side, the television sports production workplace can be a confusing environment. On face value it might be reasonable to assume the transformations reviewed so far could have been the foundation for a creative heyday for sports producers and directors. In some important respects a very different scenario is playing out, one that is shaped by inhibitions and restrictions. Chapter 8 examines trends in independent production, from investment in production companies through to the rise of the production manager.

Evidence has been collated from longer form semi-formal interviews with leading participants from the independent sports production sector. Day-to-day field notes and examples taken directly from my experience as participant-observer are also referenced. Academic research describing the contemporary day-to-day work of sports production companies, producers and directors is scarce. Among a limited and dated output (Barnett (1990), Whannel (1992), Boyle and Haynes (2000,2004) and Haynes (2005)) observations by Tunstall (1993) remain useful. Developing an idea put forward by Burns (1977) Tunstall argues that producers operate in "closed and private worlds" (Tunstall, 1993:2). This is accentuated by working within prescribed genres that serve "to shut sports producers off from the rest of the world of television" (1993:67), for sport the distinguishing features include high volume of output, unscripted content and technical complexity amongst others. It is argued here that important new sub-

genres *within* sport further delineate production skills, for example the emphasis placed on live coverage, and this creates more pressure to specialise. Tunstall also questioned whether the prominence placed on technology and logistics in television sports diminishes its journalistic value (Tunstall, 1993:72). This updated position sees prescriptive control as one of the major issues faced by independent sports producers and directors.

### **8.1 The UK independent sports production sector**

The first UK independent sports production companies emerged in the 1970s and 1980s; the launch of Channel Four in 1982 was significant so, too, was the 1990 Broadcasting Act, as it introduced a general independent production quota of 25% across all non-news commissioned programming (HMSO, 1990; Mediatique, 2005). In sports production, the growth in sponsored and bartered distribution content (where programmes are typically provided to a broadcaster for free in return for advertising space) and collaborations directly with federations, for example the joint venture between The European Tour (of golf) and TWI (now IMG Sport Media) to form ETP Productions in 1991 also added impetus. However, the UK independent sports production sector has never been large. As an observer-participant over the past 2 decades I have seen some companies cease trading and the remaining firms shift orientation from focussing on creative output to realising their value as a business, with a corresponding tendency to offer more specialised output. Commenting on the nature of markets, Doyle (2002) writes:

The structure of a market depends not only on the number of rival sellers that exist but on a variety of other factors, including differences in their product, the number of buyers that are present, and barriers to the entry of new competitors. (Doyle, 2002:8)

In 2014, the UK independent sports production sector remains small and the entry of new firms, like Endemol Sport<sup>110</sup>, is relatively restricted (Khalsa, 2012).

### **Background**

Cheerleader Productions was one of the first independent sports production companies in the UK. I worked at Cheerleader from the late 1980s, as a participant-observer I recall the company was funded by an annual fee it received from Channel Four (around £400,000 per year; relayed to me at the time by the managing director), for which a team of 6 producers and assistant producers were on call, effectively acting as the Channel Four sports department. Managing director Derek Brandon also informed me Cheerleader policy was to adopt an overtly US styled approach to production values, arguing that televised sport in the UK was under produced compared to US sports productions. Methods and technologies were freely imported as Cheerleader packaged US sport for UK broadcast including the NFL; Japanese Sumo wrestling was added in 1988 again for Channel Four. I was producer of *Sumo* and I can confirm that, in the late 1980s, the process of producing programmes generally took precedence over business affairs, although questions surrounding rights and other issues, including specified access at events, were beginning to impact on production work.

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<sup>110</sup> Endemol Sport operated for 3 years from January 2009.

An ex-ITV and BBC executive, Mike Murphy, ran Television Sport and Leisure (TSL); the company bought and sold sports rights in what was a fledgling market. During an interview in 2011, a senior production manager that worked for TSL confirmed that Murphy began to offer production consultancy, again a new area for independent producers, including selling the overseas broadcasting rights to the 1991 Rugby World Cup.

Founded over 40 years ago<sup>111</sup> Trans World International (TWI) had been established as a part of IMG to add television production services for clients the McCormack organisation already represented, including golf and tennis federations. My interviews with sports producers working for TWI in the early 1990s confirm the company began to specialise in outside broadcast coverage from challenging locations. Equipment was designed to be packed easily and transported between venues, including island hopping for West Indies cricket and league football from China. Whilst TWI pioneered flyaway production techniques, it also produced the long running magazine, *TransWorld Sport* that, in early 2014, is still in weekly production. Speaking in 2013, one producer who graduated from *TransWorld Sport* to Chinese football recalls there was “still a tendency for broadcasters and federations to view different cultures through sport”. This was certainly the case with early Channel Four productions from *Sumo* to *Kabaddi*. The producer also added a note about prominence:

[Before multi-channel sport] what it does mean is people remember better and were more attached to sport when there was less of it [on television]. (Series producer, independent sports production, 2013)

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<sup>111</sup> According to IMG’s website, <http://www.imgproductions.com/our-work/sports-production>, accessed 24.02.2014. TWI now trades as IMG Sports Media Limited.

Using sport as a lens to view culture was relatively short lived approach as the downstream market in sport content provision began to change in the early 1990s. The same producer suggests that, pre-dating the expansion of BSkyB in the UK, the Pan Asian satellite channel, Star, was the first dedicated sports channel to require significantly more sports content to fill its schedules. In the US ESPN and TBS also required more content. In changing market conditions TWI was well placed to react. From the outset, and due in part to the background of several of its senior executives, TWI was often viewed as a sort of annexe to BBC Sport – in early 2014, 3 out of 4 of the company's most experienced executives had prominent BBC backgrounds. Some senior IMG producers speaking to me in interviews between 2011 and 2013 confided they see the company as the "Marks and Spencer of sports television", because it provides competitively priced programmes, including large volumes of content, rather than stand out creativity and innovation. That IMG also represents federations and rights holders and has sales offices in numerous countries is also significant. A former ITV head of production, interviewed in 2013, confirmed a widely held industry view that IMG provides a benchmark for costs: "You always get a production quote [price] from IMG as this will give you a guide to the lower end of expected costs on any project".

The UK's independent sports production companies were small but each, in some way, was pioneering. Sunset+Vine was formed in 1983 to produce sponsored/advertiser-funded programmes and offer bartered syndication deals, like *Gillette World Sport* that ran for 25 years between 1984 and 2009. Interviews with programme producers confirm that distributed magazine programmes like *Gillette World Sport*, *TransWorld Sport* and *FIFA*

*Futbol Mundial* saw their access to elite content dramatically restricted with the extension of sports broadcasting rights and copyright control – “We just can’t do top level sport anymore; the rights are prohibitive and exclusive” (Series producer, independent sports production, 2013).

Cheerleader Productions split in 1989, with Derek Brandon joining event entrepreneur and former athlete Alan Pascoe to form Grand Slam Productions, where more advertiser-funded content was targeted. Again in my role as a participant-observer, I witnessed the original Cheerleader bring in an executive producer from the BBC, Charles Balchin, as the company continued to produce NFL and Sumo coverage into the early 1990s before the Daily Mail General Trust (DMGT) purchased it.

Also in the early 1990s Chrysalis fully entered the independent sports production sector. Chrysalis Sport Managing director Neil Duncanson informed me that he took advantage of an opportunistic moment when making a documentary on Paul Gascoigne – the England player who had famously cried during an Italia 1990 match and had been transferred from Tottenham to *Serie a* club Lazio. To show any Italian football highlights in the Gascoigne film Chrysalis had to acquire the broadcasting rights to *Serie a* from RAI, the Italian broadcaster and rights holder. The acquired rights were offered to Michael Grade, then at Channel Four, who purchased them in 1992 just as BSkyB had acquired exclusive rights to live Premier League football. Significantly the *Gazzetta* weekly highlights programme was complemented by live coverage on Sunday afternoons, as *Football Italia* became the only live league football that could be seen on terrestrial television in the UK. By looking for gaps where they could operate in the

content production market, independent sports production companies had already taken the first step towards specialisation.

### **Issues**

A major problem for independent sport production companies is that they very rarely hold any broadcasting rights. Also, they do not have direct access to audiences. Instead, and unlike general programme provision, independent sports production companies offer services for costs plus a percentage fee to broadcasters or rights holders. Typically broadcasters will pay all production costs but, because they only hold primary rights, there is no benefit from selling this coverage to other broadcasters (as secondary rights are normally retained by the issuing league or federation, see chapter 5 for an explanation of primary and secondary rights and Doyle, 2002:80-90). In these circumstances sports production companies find themselves constantly competing to win production tenders - Request For Production (RFP) and Invitation To Tender (ITT) - issued by broadcasters, federations or third-party rights holders; they are in competition with other independent sports production companies and, sometimes, with broadcast sports departments including ITV Sport. Independent production companies seldom carry major capital investment in property, hardware and technology, with IMG Sports Media providing an exception with its studios, post-production and distribution divisions located near Heathrow Airport in London. The worth of an independent sports production company is usually based on its production order book, the ability of key staff to attract new business and its potential for growth, with these factors weighed against staff salaries, rents and other operating costs. As a participant-observer I recall managers/owners complaining - at various times when favourable

interest rates on deposits were available - they could achieve better returns by putting their money in the bank than investing in independent sports production – a good return was considered to be 3-5%.

During the past decade there has been a trend where private equity firms have taken ownership and shareholding control of independent sports production companies. For example, Tinopolis/Vitruvian Partners control Sunset+Vine and All3Media/Permira own North One. In December 2013, Forstmann Little sold IMG Worldwide to William Morris Endeavour and Silver Lake for US\$2.3 billion, having purchased IMG in 2004 for US\$750 million (Sweney, 2013). In May 2014 Discovery and Liberty Global paid £500 million to take over All3Media, including North One (Sweney, 2014). For investors including an agency (William Morris) and a broadcaster (Discovery) sport production is often one arm in a bigger group of independent producers including genres that hold valuable secondary rights to content – as Doyle 2002:82 notes, it is the retention of secondary rights by producers that has attracted venture capital to independent production. However this does not apply to independent sports production companies, as a broadcaster or media provider will hold primary rights whilst the leagues and federations retained secondary rights. At Chrysalis, I heard the owner, Chris Wright, state on several occasions it was “useful to have a high profile independent sports producer on the books” because boardroom executives often enjoyed talking about Formula 1 and Serie a football.

Based on my experience as a participant-observer working at Cheerleader, Chrysalis Sport, Endemol Sport and IMG Sports Media, and corroborated by field notes and interviews held with senior executives from these

companies, the contemporary situation can be paraphrased like this: Today, private equity firms typically work on a 3-5 year business plan that aims to maximise the value of the company before selling it on for a substantial profit. This generates pressure to raise revenues and reduce costs, particularly staff costs. However, given the cyclical nature of sports broadcasting rights and the fluidity in the downstream programme commissions market, plus ever-reducing profit margins (particularly pressure on costs plus fee service contracts that specify a production fee based on a percentage of the overall costs – since the late 1990s these fees have been gradually eroded, typically from 15%, to 10% and now, for larger contracts, where the fee can be limited to 5%<sup>112</sup>), longer term growth planning becomes more challenging. When the requirements of regional production quotas, including establishing regional offices, and Transfer of Undertakings (TUPE) regulations – when staff can receive protection if projects migrate from one company to another (see chapter 6) - are all added, then substantial financial returns become harder to deliver.

Another problem is one of scale. The smaller size of independent sports production companies, at least compared to broadcasters and other media providers, means typical economies of scale and economies of scope enjoyed by broadcasters and large transnational media providers are mostly missing and this can introduce a degree of instability, particularly with expansions and contractions in the workforce. Of all the UK independent sports production companies perhaps only IMG Sports Media, as it seeks to vertically integrate production, studios, post-production, satellite services

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<sup>112</sup> The BT Sport production contract RFP in summer 2012 included a large number of exclusions, like studios and outside broadcasts, for which no production fee could be charged. BT also proposed a series of fines should key action be missed in live coverage.

and distribution, plus access to federations via its agency, rights and archive management services, comes close to this template. Speaking to the managing director in 2013, even a company of this size remains vulnerable to losing its biggest contracts as productions are retendered. Efforts to retain existing contracts and to win new contracts are continuous and costly. Projecting profits, controlling cash flows and managing the company head count have become essential day-to-day activities. At IMG Sports Media in 2013 there was a monthly editorial board meeting for senior production staff. Having attended several of these meetings myself the primary focus was not on editorial matters but on company performance and potential results, a monthly financial health check that is indicative of the current climate. The transformation of independent sports production to a vehicle for private equity investment is part of neoliberalisation, what Harvey (2005:33) describes as "the financialisation of everything".

Without direct access to audiences, it can be argued that independent sports production companies exist around the fringes of the broadcasting economy, allowing broadcasters, leagues/federations and sponsors to hire specialist services for costs plus a fee over a longer or shorter term as required. As federations provide host broadcast operations for their own events, then there is a trend for independent companies to act like agencies offering specific production skills and named producers and directors to the market.

## **8.2 Live television sports production, creativity or prescription?**

Since 1992 live broadcasting has come to dominate the UK's television sports landscape, including the work of independent sports production companies. Live sports production has attained a similar level of prominence to that enjoyed in the US, as one experienced producer explains:

US television sport invented replays, graphics and the use of statistics among other things. These techniques have been exported all round the world now. Sky Sports has adopted very US-styled techniques. Some sports have taken ideas from the US and used them to their own advantage but, overall, we've come a very long way from the way we used to do things in the UK. (Senior producer, independent sports production, 2012)

How far we've come from the way we used to do things in the UK is an interesting point as it signifies the scale of transformation in television sport. One senior manager at an independent sports production company, considered a pivotal point to be ITV's 1978 snatch of the day (when ITV acquired football league rights from the BBC):

You could feel it [the arrival of more money] in the air. Now, the income per head generated by football is comparable to the NFL when market size is taken into account. (Senior manager, independent sports production, 2013)

This underlines the view, held in the late 1980s and early 1990s by football club owners and the newly formed Sky Sports, that television sport in the UK, particularly football, was under produced. The rapid introduction of up scaled live production methods and how this took precedence over more traditional presentation, like highlights and magazine formats (see chapter

4), represents a very significant change in UK television sports production culture; this gear-change favoured producers and directors that were most comfortable with the technical, logistical and editorial requirements of live broadcasting.

Producers and directors that worked on live flagship sports output became the most highly rewarded in sports production. This replicates the status enjoyed by live producers in the US (as I can confirm as a participant-observer working in the US for 5 years in the 1990s). With large segments of unscripted presentation and studio-based discussion, plus the uncertainty of outcome surrounding matches and events, the demands on producers and directors working in a live environment were significantly different from those working with highlights and magazine formats. Live sports coverage is an environment where the ability to think quickly in reaction to events and to manage output, virtually always under pressure, is highly prized. Live production was not so much a new sub-genre but had become *the* genre that defined television sports production.

However, the introduction of more technology in live sports production tends to obscure some important underlying issues. Priorities for live sports directors are often split; a leading international live sports director describes the need for situational awareness and the tension between (a) telling the story of the event, (b) controlling the available technology and (c) providing a coherent output:

I need to be aware of what's happening in the match/event and to tell that story. But I also need to be aware of the television environment, the camera placement and other points of view and how I am putting this together on air. (Live international sports director, 2012)

Live sport production can be an intense working environment. Interviewing a number of live sports directors, they noted that further tension may arise depending on who the director is working for; is the director required to provide a safe pair of hands when delivering federation-based international coverage, or is something more creative required by a broadcaster for its local audiences? With the dramatic technological changes in coverage that were being rolled out, directing was also becoming more complicated; a live sports director explains:

Cricket was covered with about 8 cameras and 4 tape machines, now we use 25 cameras and 8 channels of EVS – the equipment has become much more capable. Since the 1990s we've moved from 48 to 168 inputs into the switcher [mixing desk], 1 graphics source has become 3 graphics sources. The size of the kit is small, but the capacity is so much greater. Tape has gone and the advent of servers is simply revolutionary... with an all-digital environment the scale of outside broadcasts has increased hugely. (Live international sports director, 2012)

The introduction of digital technology gave live sports directors significantly more cameras, a variety of graphic tools and considerably more instant replays. These additional inputs had to be managed at the same time as capturing and reflecting the ebb and flow of the story from the field of play. Another interesting point from the interviews concerned creativity and how

creative coverage does not appear to be determined by the number of cameras but by the overall way resources can be combined, as a very experienced live sports director testifies:

It isn't so much the number of cameras used - whether it is 8 or 38 - a decent director can use 7 cameras and still deliver good coverage. The bigger step changes are replay systems and graphics. EVS allows you to isolate nearly every single camera and chose from 20 different replays. A single penalty incident can generate 7 or 8 different angles you can discuss later in the pub. Graphics have been transformed from Letraset<sup>113</sup> on black and white magnetic strips that were keyed in, to what we have now: fully animated team sheets and other match details [statistics]. Don't forget it wasn't long ago that score clocks didn't exist now they are taken for granted. (Live sports director, independent sports production, 2013)

Whilst most live sports directors tend to be technically rather than editorially oriented, it is important that technology itself is not the key factor but rather the ways in which this technology is used. Live directors may debate the merits of different technologies and how they have shaped output but they were not the only people to see how this was transforming coverage, leagues and federations – as discussed in chapters 4, 5 and 7 – saw opportunities to harness new technologies and workflows so they could take production under their direct control. What is interesting is how new digital technology with the dramatic increases in capacity described by directors could certainly be used creatively. However, the same technology

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<sup>113</sup> Letraset is a graphics transfer system where captions were built manually onto black cardboard.

also provided the circumstances where federations were able to demand a more prescriptive approach to coverage of television sport.

With the potential offered by a fully digital workflow, this era might have delivered more creativity and innovation but, whilst there have been many enhancements to coverage, issues to do with prescriptive control and standardised output are recurring themes. Nearly every sport can provide some example of improvements in event coverage, from highly mobile flying camera rigs down to miniaturised cameras improving access, plus a wide range of revealing replay and analysis tools. However, there is another crucial non-technical factor that dictates each and every working context, including what can and cannot be done: the *customer* the production company, producer and director is working for. And this influence may be even more significant than the technology used, Haynes (2005:10) goes as far as to say that intellectual property rights have been used to “actually inhibit innovation and creativity”. The gloss of new technology applied to television sports tends to obscure such issues.

### **8.3 Commissioning content**

As the volume of televised sport content has grown so, too, has the importance of who commission this content and why. The implications of commissioning are now reviewed.

Whilst Tunstall (1993:67) considered that producers were cut off from the rest of the world of television, he noticed a further difference with sports producers:

... these producers' world is less private than that of other producers in one important respect. These producers are closer to their audiences than are the producers in any other genre. (Tunstall, 1993:76)

Tunstall continued to argue that sports producers were unusual in believing that feedback from friends and acquaintances can be helpful. This appears to be based on a strong emotional commitment to sport shared by both producers and viewers (Tunstall, 1993:76). It also raises a question that may be more relevant in 2014 – who is the sports producer's customer?

Historically, as Tunstall found, many producers, as sports fans themselves, have considered their customer was the audience – I have experienced this argument directly as a participant-observer. Doyle (2002:8) reminds us that “media content has no value unless it is distributed to an audience” and, again (Doyle, 2002:80), that producers are linked to the audience via intermediary stages in a vertical supply chain, therefore it is not the audience *per se* but the broadcaster, federation or, in the case of advertising-funded programming, a sponsor<sup>114</sup> that is the customer for television programming. This is important because, as discussed throughout this research, each customer has quite different demands and priorities. Unlike broadcasters, that have some influence via the substantial fees they pay for rights, independent sports production companies are dependent on these commissions for their survival and can easily be caught between the different requirements of rights holders and broadcasters. How this impacts on companies and individuals is now reviewed.

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<sup>114</sup> Sponsor-funded sports programming is unlikely to involve live broadcasting. As many of the points made about federation-based production are relevant to sponsor or ad-funded programming this is not discussed separately.

## **Broadcasters**

Since the late 1980s broadcasters have been a critical source of business for independent sports production companies. When a broadcaster wins sports broadcasting rights a further competitive tender may follow. As noted, independent sports production companies are invited to respond to a Request for Production (RFP) or an Invitation to Tender (ITT). When BT Sport launched in 2012, the media provider did not have a substantial production department that could meet its production requirements, therefore it tendered its Premier League football production. As a publisher-broadcaster, Channel Four carries out tenders for all of its major productions. The BBC has regional and independent production quotas it must achieve, whilst Sky Sports occasionally tenders specialised productions, like fishing. Winning these tenders is a critical activity for independent sports production companies. Whilst many of these processes are protected by non-disclosure agreements and financial confidentiality I have, as a participant-observer, been involved with numerous production service tenders since the late 1980s and have added specific field notes from examples during the past 5 years.

From 2009, an increased influence from procurement specialists and internal legal and contractual professionals working for broadcasters was reflected in the tender documents issued, particularly in examples from ITV and BT Sport. Increasingly tenders are set out in such a way that the responses can be scored by the issuing procurement managers with the answers to key questions, the range of services provided and the value measured and then compared. This process is designed to deliver a more rational means of allocating a production contract. Interviews with senior

executives at independent sports production companies between 2011 and 2013 suggest they take a prosaic view in so far as “every box must be ticked” and “all questions answered” in each tender response, even if this means submitting a large final document<sup>115</sup>. It can be argued that the use of scoring to assess the creative aspects of a response is indicative of how creativity has been subjugated in respect to an overall desire for compliance and financial value. However, when it comes to providing evidence then a trend towards specialisation is easier to identify, both at the level of independent sports productions companies and among producers and directors.

For example, having produced Formula 1 for ITV as a participant-observer I can confirm that Chrysalis Sport expanded its motorsport expertise to include production of the World Rally Championships and Isle of Man TT. In late 2013, the company (now North One) used this experience to secure a five-year contract to produce MotoGP motorcycle racing for BT Sport (Considine, 2013). Whilst this may be commercial opportunism, broadcasters do appear to be more comfortable where there is a clear track record of production in a specific sport, in this case motor sport. Looking at other examples, Sunset+Vine have been successful in their presentation production – their work around the shoulder of event coverage – including Channel Four cricket, BBC horse racing, Sky Sports rugby union and BT Sport (football and rugby union). By contrast, with a track record of working directly with leagues and federations, IMG Sports Media executives, interviewed between 2011 and 2013, recognise whilst the company is associated with a more conservative outlook it enjoys a reputation for

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<sup>115</sup> I have seen submissions that exceed 300pp not including additional budget forecasts.

reliability when delivering content. However, the trend is towards providing expertise in any given televised sport production with overt pressure to do so. In 2012 when IMG Sports Media responded to a tender from Channel Four to produce the channel's horse racing coverage, a senior executive confirmed the priority:

The first thing you have to do is to go for the expert in horse racing. Similarly, to win the BBC snooker contract you have to present people who are known for these sports.

Independents have to pitch with expert [producers] otherwise you won't get in. It's like a hamster running on a wheel, it never changes. (Senior manager, independent sports production, 2013)

This raises the question of whether *replication* has become more important than *originality*; asked how new ideas could be introduced in such circumstances the answer was:

The funnel is getting narrower. I once totted up how many different sports I had worked on; it came to 42. I don't think this will happen to anyone in the future. Federations are becoming more prescriptive in their production requirements and producers are becoming more specialised [in their output]. (Senior manager, independent sports production, 2013)

The necessity to provide production experts coincides with a perceived narrowing of the funnel for creativity. But these developments also illustrate the increasing division between coverage and presentation in sports television. A factor driving this trend is how federations have taken control of host broadcast operations (see chapter 7). Whilst this provides a further

opportunity for independent sports production companies to offer their services for hire, what are the implications?

### **Federations**

A respected international live sports director explained the primary differences when producing live content directly for a federation and that delivered to a broadcaster:

For a federation I'm creating a generic world feed. The premise is guaranteed uniform and stable coverage of the event for all international clients. For the ATP [Men's professional tennis] this would be [for] 138 countries. The world feed follows a set format, so a safe pair of hands is most important as this allows clients [international rights holding broadcasters] to jump in and out of our coverage cleanly when they want to. It's proper coverage, but safely done. Working for a broadcaster, or a specific channel, would need more creativity, as you are more responsible for how that channel looks and feels. (Live international sports director, 2012)

There are two dynamics operating; between providing standardised international coverage that multiple broadcasters can cut in and out of and more specific coverage designed for a single broadcaster or channel. A further tension exists around the preference to work for a federation or a broadcaster. Speaking to a number of independent sports producers there was only one who preferred working for a federation; the general sentiment is that federations including Formula 1, UEFA, FIFA and the IOC are increasingly prescriptive in their production requirements. It is argued that this represents a very significant shift from previous working practices of

creating a production (usually for a single broadcaster that offered some leeway in interpreting events) to a contract-driven delivery process involving highly prescribed content designed for multiple international users. This is a new kind of content that is nearly always for federations and it contains different levels of compliance within the prescribed workflows and deliverables. Offering a wide-angle view of the situation, a company director at a leading independent sports production company observes:

Creation [in future] will be around shoulder programming; pre and post kick off, that's where it will come from. Once you go to the stadia and the referee blows the whistle, or the green light goes in F-1, whatever, it [the coverage] will be more prescriptive. There is more and more prescription [from Federations] and less and less input from producers. Yes, that's the case. (Senior executive producer, independent sports production, 2013)

These prescriptions were discussed in chapter 5 (UEFA Champions League) and chapter 7 (federation-run host broadcast operations) including the ways coverage of events are now set out by the federation via their production manuals, with broadcasters taking responsibility for their domestic presentation of the event, in other words the shoulder programming around the event.

Delivering increasingly prescribed content presents its own challenges but, ultimately, it is a more mechanical process (and one that is more easily described in contractual terms as the services provided) than is the case when interpreting events or providing more creative programming. The clarity provided by such prescriptions may suit some sports producers and

directors, but by no means all, particularly those used to having more input.

A very experienced senior producer summarises:

Production for the Olympics is by the book. There are excellent producers and directors sitting around with nothing to do other than follow the Production Manual that is provided [by Olympic Broadcasting Services]... The Olympics want to give a product they can depend on – for example with clear cue points [for opt outs and opt ins] and good quality. This is how it is sold to rights holding broadcasters.

The television departments at UEFA and FIFA are also far more instrumental in how it works. At the last EUROs [2012] it was rubbish [for coverage] to go to a top shot immediately after a goal, even before a replay on camera 2. It was straight out of the manual 'cos everyone did it. You need to have 2 or 3 regular replays before a top shot makes *any* sense. (Senior producer, independent sports production, 2012)

Similar complaints were levied against the prescriptions required in Formula 1 coverage. Some coverage requirements (the sequencing of cameras and replays in particular) do not make sense to directors who have produced their own coverage in the past. Looking at typical prescriptions provided by other federations, a highly regarded sports director adds further perspective:

The Olympics give you very clear instructions about what is and is not allowed. Overt pressure from sponsorship has always been there. It's in proportion to the size of the event – the magnitude tapers down with the organisation running the event, say from the Olympics to the Asian Games. But even small events now give guidelines on what they want and don't want to see. It's all linked to their commercial obligations as sport becomes more

commercialised. Federations and organisations need to protect those relationships and that's one way of doing it. (Live sports director, freelance, 2012)

Such instructions increasingly seek to provide television coverage that is wholly sympathetic to the needs of the federations' own marketing and sales strategies, including their relationships with sponsors and advertisers – in some important ways television sports coverage has become another marketing tool for elite sports federations. In chapter 3, NBA commissioner David Stern was quoted:

That's the beauty of television. Other brands have to buy their way on through advertising. Our core product is a two-hour commercial [the NBA game] that someone pays us to run. (Jay, 2004:229)

Sport as a brand, as a product and with games and events running as if a commercial, is part of the growing global marketisation of sport. Following work by Whitson (1998), Falcous (2005) argues this type of development:

... represents a new stage in the commodification of sport, such that it may be gradually detached from meanings based on attachments and loyalties. In the place of, and supplemental to, geographical loyalties come the discourse of personal and consumer choice. (Falcous, 2005:59)

It is argued that sports producers and directors *must now play by the rules, or they don't play at all*. As the rules are frequently set by rights holders and apply to broadcasters, independent production companies and

individual producers and directors this is a critical point. It is one of the most fundamental changes in television sports production since 2005.

As the rules of the game continue to change, producers were asked what the main difference in working for a federation or for a broadcaster was. A live sports director provided this summary:

The difference is like living in a democracy and living in North Korea. If you are covering an event for a broadcaster you do so from an outside perspective. But working for a federation, who owns their own rights, the event must be covered in a positive light regardless of how it may seem. Working for a broadcaster gives you that independence to call a spade a spade. But working for a federation you have to tread very carefully and always portray things in a positive light. (Live international sports director, 2012)

Working for federations, producers and directors must always present events “in a positive light *regardless of how it might seem*” and, by doing so, they deliver approved international feeds (that are sympathetic to sponsors requirements) subsequently aired by rights holding broadcasters. But, are broadcasters able to act any more independently? In February 2014, it was alleged that BT Sport dismissed ex-referee Mark Halsey as a pundit following pressure from the Premier League (Sale, 2014b). Looking at developments more generally any serious notion of broadcaster independence appears to be an idea that is in rapid retreat due to the eye-watering amounts of money paid for exclusive broadcasting rights and the subsequent need to comply with collateral commercial relationships. In any case, it is argued that the differences between working for a federation or

for a broadcaster have become less pronounced and that, without any significant changes in prospect, many remaining differences will continue to diminish over time. Given the description (by a senior manager at an independent sports producer speaking in 2013) that “the funnel continues to narrow” another trend within television sports production is evident, the pressure on individual sports producers and directors to specialise.

#### **8.4 The trend towards specialisation in sports production**

In November 1997 I worked for Chrysalis Sport where I wrote an internal management document titled *People, practice and profit*. At that time the company had 42 people working on 7 major sports productions involving all major UK broadcasters. The document explained typical progression through production roles. As independent production is already a form of specialisation, and as companies also have less scale and scope, it is worth providing a brief update as part of a discussion on how specialisation has accelerated. This update is based on new field notes as a participant observer taken at several independent sports production companies; short form interviews with senior managers are also incorporated. It is also worth recalling Tunstall as he argued the role of television producer does not constitute a profession - there are no recognised qualifications, nor is entry to the sector controlled (Tunstall, 1993:203). The requirements for the role are subjective and dependent on the working context, a context that has been transformed in recent years.

Up to the late 1980s and early 1990s, progression at traditional broadcasters like the BBC and ITV was described anecdotally as filling dead

men's shoes, opportunities for promotion mostly occurred when someone left or retired. Junior staff would join as librarians or as trainee production assistants (later known as assistant producers). Staff would be encouraged in one of two directions, towards an editorial role (producer) or towards directing, with a further distinction made between outside broadcast direction and studio (presentation) direction. At the BBC and ITV the engine room of sports coverage, particularly for major events, was the corps of assistant producers who turned around all incoming VT feeds for use on air. With limited opportunities for promotion, breaking out of the assistant producer ranks was challenging. However, as an ex-BBC executive producer speaking in 2013 confirmed: "The BBC had everything [in terms of rights] so there were opportunities to work on a wide range of sports, from the Olympics to World Cup Finals."

The arrival of independent sports production companies, followed by BSB (Champion), Sky and then BSkyB created more fluidity in what had been a very static job market. As noted, it also placed a greater premium on producers and directors with live broadcasting experience.

Entry level at an independent sports production company was as a runner or a researcher. Junior assistant producer was the next step, someone that could carry out action editing: provide basic scripting, location contacts/fixing and short feature storytelling. Senior assistant producers would shoot and edit complete features and be able, under supervision, to construct shorter format programme episodes. A junior producer would do much the same, but with slightly less supervision, whilst a producer would

take charge of a complete programme working under a series editor/producer or an executive producer.

A series producer would take charge of multiple programmes in a strand, manage the team and ensure all paperwork and archiving is completed. A series editor differs in so far as they would provide an overview for studio-based productions featuring guests and discussion. Heading the team is the executive producer, someone that selects staff for each project and works on a number of series simultaneously, providing more advanced programme development and detailed project planning, including preparing responses to competitive tenders from broadcasters or federations.

For live sports television, gaining relevant experience can be challenging, even more so for freelance contractors. Some vision mixers have progressed to become directors, but another route would involve an assistant producer running replays, the multiplexer (a machine used to route VT signals to the studio), or switching a number of live isolated cameras into a single feed. Access to opportunities improved if you were assigned to a single sport and could build up a reputation as someone that could be trusted. Beyond that there may be limited occasions to provide second unit direction, or a small OB providing a live inject to a larger programme. A step up would be for lower specification coverage from an as live minor event.

Training in television sport is primarily on the job, with opportunities often limited to the scope of the broadcaster, media provider or independent sports production company. Typically people work at a job for some time

before receiving a formal promotion. On the other hand promotions are often made internally.

Recent changes to workflows (see chapter 4), combined with substantially increased demand for sports content, means there have been more opportunities to enter sports television with many starting at assistant producer level. Promotion to producer can be faster but is often made within a limited terrain, for example working on a particular series or on a specific sport. For example, a junior assistant producer may find opportunities for progression within, say, Premier League Productions but, having progressed, might find it hard to transfer these skills to another sport. As Tunstall (1993:74) found, it is generally difficult for sports producers to export their skillset to other genres outside sport – in my experience this remains the case.

When television industry practices, including implementing short term contracts for production staff (including project-specific contracts), are aligned to a tendency towards annual programming commissions (even when rights are held for longer periods by broadcasters, annual production contracts are still often preferred) then the appearance of tram lines that can dictate career development is hardly a surprise. Increased demand for content is frequently offset by the constant pressure to reduce costs, including overheads and production fees, so with tighter production conditions this, again, reinforces the tendency to opt for more defined roles and appointing people with a reputation for delivering; for *replication* rather than *innovation*.

For some sports there are circumstantial reasons for specialisation, as the senior managers and producers interviewed in 2012 and 2013 confirmed. For example, a senior director with direct experience points out that directing Formula 1 coverage requires control of 50 or more cameras across a race circuit, there are additional in-car camera feeds, a vast array of replay options plus streams of performance-related data to process and present. An executive producer with broadcaster experience adds multi-sport coverage, as is the case with athletics, presents location and timing issues as events happen concurrently across the venue (the ability to juggle EVS clips to give the impression of a constant flow of action and to offer some sort of narrative form is a specialised skill). A specialist golf executive producer interviewed in 2012 confirmed that a similar technique is used where the broadcast action is usually a constantly updated flow of short clips from EVS. Sports including golf and world rally also require cameras to be rapidly relocated from one position to another to capture the action – this is another type of specialised directing that places a greater emphasis on logistics to provide effective coverage. For sports like football, rugby, cricket and tennis, producers and directors stressed the need to capture the rhythm and pace of each match, with replays and statistics added to assist commentary. Another senior producer pointed out that American sports, with their frequent breaks, offer further challenges that are met by deploying EVS and introducing a delay of up to 3 minutes from the incoming live feed to the outgoing broadcast presentation. Reading interviews with managers, producers and directors, overall there was a strong feeling that specialisation was a significant factor.

Speaking to producers and directors who are over 45 years old their experiences are remarkably similar, many see themselves as “the last of a dying breed” of multisport producers. For most of these producers their early experience was gained at a traditional broadcaster, like the BBC in the late 1980s and early 1990s where they worked on numerous sports. The managing director of a major independent sports production company echoed the senior manager that had worked on 42 different sports:

There won't be any one else like me in the future, someone who has worked on everything. In every field, new projects [now] require specialists. (Managing director, independent sports production, 2012)

Whilst all the contributors interviewed felt sports production had entered an era of specialisation, there was less clarity about when this changed. In the 1990s and into the early 2000s, and here, as a participant-observer, I refer to successful production service tenders I wrote for NBA (Channel Four and ITV), Rugby Special (BBC), Formula 1 (ITV) and World Rally Championships (Federation-based production) I can confirm it was still possible to offer “a fresh pair of eyes” when designing coverage of sport for a broadcaster or even a federation. But, from around 2005 the scope for different ideas and new approaches appears to have narrowed significantly. In part this is due to the rapid extension of Olympic Broadcasting Services and Host Broadcast Services, plus the expanded output of league-based operations like Premier League Productions; these commissioners prefer to use production specialists.

Broadcasters increasingly prefer production experts who know the unwritten rules when covering specific sports and that will not cause embarrassment with the league or federation from which the broadcaster has bought the rights. In the case of Channel Four horse racing, in 2012 IMG hired an executive producer from BBC Sport to deliver this expertise. With producers and directors providing the same expertise for different broadcasters then differences are likely to diminish further. Considering other reasons that could be driving specialisation, a senior series producer adds a useful perspective:

There are so many new channels to fill. Before this [changed], you would work on 6 or 7 sports in a year. But there is so much sport that needs to be filled you have to specialise in football, cricket, golf, snooker, darts and so on. Producers concentrate on that one sport to the exclusion of everything else. The transformation in the volume of sport broadcast is responsible for specialisation. (Senior series producer, independent sports production, 2012)

This straightforward view has its merits, a full-service football channel broadcasting 24 hours a day 7 days a week will promote specialisation in football. But linking key producers and directors to coverage of specific sports is not new. Since the late 1980s, as independent sports production companies responded to production tenders, it was common practice to name individual senior producers or directors in the production contract for the duration of the series. Broadcasters were the first to do this but federations, too, became increasingly aware of the value specific producers and directors could add to their coverage. For example, ITV's Mike Watts

was a favourite director of UEFA on Champions League coverage. As noted, Karl Hicks specialised in horse racing at the BBC and brought this experience via IMG Sports Media to Channel Four when, in 2012, the broadcaster acquired the rights to all significant racing in the UK. For many years Keith MacMillan was known for Formula 1 coverage at the BBC, when coverage moved to ITV in the mid-1990s MacMillan, now freelance, took charge of directing the British Grand Prix. Occasionally a director who has gained recognition in covering one sport, say Martin Turner who developed rugby union coverage at Sky Sports, will be used to help secure another contract, as was the case when Sky Sports acquired the majority of rights to broadcast Formula 1. From the mid-1990s federations were becoming more aware and more influential about which producers and directors would be acceptable to take charge of coverage.

What is new today is the intense pressure to specialise exerted by broadcasters and federations. As noted, for any tender response specialist knowledge is essential – “Independents have to pitch with experts otherwise you won’t get in”, confirmed a senior executive producer speaking in 2013. This pressure is not exclusive to broadcasters: as a participant-observer I recall how the NBA tried to influence Channel Four in the choice of a sympathetic producer when Channel Four renewed its broadcasting rights for the NBA in the mid-1990s<sup>116</sup>. And, in late 2013, when IMG Sports Media appointed a new executive producer to run Premier League Productions it is reasonable to assume that approval from the Premier League was sought.

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<sup>116</sup> Having been wary of the initial editorial tone and choice of talent the NBA later adopted many of these techniques and hired several of the talent for their own productions – field notes as a participant-observer.

There is one further trend towards specialism that has had a direct influence on the day-to-day work of sports producers and directors, the rise of the production management department.

### **8.5 The rise of production management**

Since the mid-1990s a new specialisation has emerged that mirrors the increasingly business-oriented aspects of television sports production: production management. A senior manager from a leading independent sports producer with a broadcaster background explains:

Production managers and directors of production are very much an independent sports production thing. There were no such roles at the BBC, even now [there aren't any]. When independent sports production companies started they probably had producers who didn't have the experience of budgets that broadcasters had. (Senior manager, independent sports production, 2013)

My own experience as a participant-observer is that independent producers can deliver accurate budgets. Whilst not adopted at the BBC, production managers were used in ITV sports departments from the early 1990s, with some then moving into independent production. But the most interesting link is between rise of production management and the increasing centrality of contracts, IP rights and the attachment of financial value to all stages of the television sports production chain as the sector has become more business-oriented.

Collating my experience working at several different independent producers, a typical pyramid structure in a production management department includes a director of production and several heads of production that oversee groups of productions. Roles usually assigned to a primary production include production executives, production managers, production co-ordinators and production secretaries. Among key responsibilities are: project budgeting, cost reporting (reconciling forecast budgets with actual spending), insurance, risk assessment, health and safety, scheduling (from travel and crewing to post production facilities), delivery, and all contract management (including engaging and paying freelance staff, plus the acquisition of any third party material and music usage reports). Issues to do with production quotas and Transfer of Undertakings (TUPE) may also arise but would involve liaison with senior managers and specialist lawyers. Whilst not a legal or business role *per se*, the striking growth in production management appears to reflect the ways in which previously informal relationships have come to be increasingly expressed through contracts and how financial values have become the determining factors of many more activities (Harvey, 2005). For example, the relatively simple task of acquiring a release form<sup>117</sup> from a contributor has become more complex due to (a) the increasingly legal expressions used, (b) the extent of the rights sought (often for all media in perpetuity) and (c) the token compensation offered for these rights by the production company (a fee of £1 is required to validate the agreement). This has made the process more complicated and invites interrogation from contributors' agents who are

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<sup>117</sup> All contributors should sign a consent/release form before interviews can be used in a programme. As independent sports production companies generally try to avoid payments for contributions this sets up a potential conflict.

likely to attach a much higher value to the contribution as they anticipate it will be recycled (and monetised) in numerous alternative forms.

In contrast to the group of special advisors to leagues and federations dominated by men (see chapter 7), women fulfil the majority of roles in production management. At IMG Sports Media - apart from the director of production and a single head of production - the department (including 5 further heads of production and numerous production managers and co-ordinators) features female staff. There are almost no female producers.

Another revealing division can be seen in the terms used to engage staff. Whilst the majority of production managers are offered staff contracts<sup>118</sup> within the independent sports production sector the trend is towards issuing short-term contracts to all producers, directors and assistant producers. Speaking in 2013 IMG's director of production confirmed the company was "moving towards a contract-based" policy with contracts tied to specific productions. This ensures full recovery of all costs particularly salaries (for example, by limiting engagement to a single season of UEFA Champions League magazine shows, including a mid-season 2 month unpaid break). Once the over-arching production contract expires (i.e., the contract between the commissioner and the independent sports production company) the expectation is that production staff will be released unless other projects are available. With senior production managers on staff terms and producers, directors and assistant producers increasingly

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<sup>118</sup> The likelihood of receiving a staff contract increases with the seniority of the position, particularly from production manager and above.

employed on short-term project-specific contracts, whether intentional or not a divisive power imbalance exists.

As production management has extended its influence in television sports production, many of the duties once carried out by senior and executive producers – for example budgeting - have been curtailed, with producers now encouraged to focus on creative and editorial input rather than contracts and costs. One executive producer in charge of a prominent weekly magazine show at an independent sports production company speaking in 2012 confirmed he “had no idea about the programme budget”. “I don’t pay much attention to that”, he added<sup>119</sup>. In addition to gaps in information, a senior executive producer now working in independent sports production explains some tensions in play:

I was used to a team including a producer, a production assistant and a technical manager. That’s it. The production manager role was new to me; I’m still not 100% clear what his or her role is. At first it seems more financial, but then they’ll get involved in booking a satellite... Heads of Production definitely try it on with younger producers because they can, but not with old and haggard producers like me. (Senior executive producer, independent sports production, 2013)

Many producers interviewed confided they were happy to work with production managers, but most found the role of head of production more vexing as questions of authority arose – who is in charge? In 2011 I was executive producer of a new series of documentaries made by IMG Sports

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<sup>119</sup> As participant-observer I was aware the budget was running over and was causing serious alarm at the company.

Media for Trace Sports. Formally introducing the IMG team to the client it was made clear, by the director of production, that the team leader was the head of production. The head of production was staff, the executive producer role on short-term contract. Examples like this signal the central importance of contracts and compliance in day-to-day production matters.

Among the younger producers interviewed, many viewed production management as acting as some sort of internal policing, constraining programme spending, enforcing compliance and various contractual activities, ranging from the use of third-party footage and music to risk assessments and insurance reports.

The tension continues as production managers frequently view producers as being undisciplined or lacking motivation when it comes to meeting assigned budgets and carrying out necessary administrative duties, including providing signed consent forms, clearing third party content and declaring music usage in completed programmes. As one senior production executive confirmed:

I am sick of playing the bad cop, chasing up clearances and contributor release forms that producers can't be bothered to get signed when they are shooting, but know they should have done. We go to great lengths to let them [producers] know exactly what they need to do, but when they don't even bother to read the guidelines they are given it becomes very frustrating. (Senior production executive, independent sports production, 2012)

These comments, made by a respected production executive at a leading independent sports production company, represent a typical response. Many production managers working in sport revealed they felt undervalued by the producers they work with and some felt undervalued by the company. The split between editorial and operational management is an important trend that, intentionally or not, sees producers and directors being led away from the business-side of production. As they also see opportunities for creative input reduced - particularly in respect of league and federation run productions - then friction cannot come as a surprise. In some respects this situation can be regarded a consequence of the rapid expansion of the downstream content provision market and the financialisation of independent sports production activities.

### **Regulations and approvals**

Briefly returning to media regulation, regional production quotas and Transfer of Undertakings (TUPE), it is reasonable to conclude that company managers, heads of production and executive producers have primary interaction with these areas (see chapter 6), with most producers happy to keep such matters at arms length. However, the rise of health and safety and third party liability usually has a more direct impact on production. An experienced director working on live international productions explains the changes he has noticed:

Health and safety is the biggest element in live production. Cables laid near athletes or the public and working at heights are a no go compared to 15 years ago. There is a lot more preparation – and health and safety in place – to get Bob up on a wall so you can get your

nice wide shot. But, increasingly, there are also cultural considerations. For example, how women are expected to dress when working in the Middle East. (Live international sports director, 2012)

Sports television is not the only industry to see health and safety management spread. In any case, as the scale of outside broadcast and major event coverage has increased markedly they have attracted more scrutiny. Most independent sports production companies run health and safety courses that require staff to update their understanding on a regular basis. However, issues to do with conduct and security are relatively new developments. A film about the Anzi Makhachkala football team based in Dagestan (an unstable federal republic of Russia located in the North Caucasus by the Caspian Sea) that I supervised for IMG in 2011 required a detailed specialist security report to be carried out and recommendations for safety set out before the production could proceed. Similar conditions apply for sports events held on remote or in potentially dangerous locations, this include the last two World Cup Finals in South Africa and Brazil.

Discussing the changing demands of the role prompted contributing producers to raise a further concern: the increasing layers of editorial approval now required, both internal and external, compared to 15 years ago.

Whether it is (a) a broadcaster's commissioning executives, genre heads and channel controller, (b) intervention directly from leagues or sponsors, or (c) production manuals prepared by federations, the perception is there

are far more steps spanning a wider range of editorial decisions. To some extent this may be a hangover as sports producers adjust to the reality of working for different clients (rather than the audience) and that, in the past, they had enjoyed significant freedom during live broadcasts where direct intervention is less practical. Further levels of supervision also reflect the increased importance of sports content to rights holding broadcasters.

Two examples from Channel Four illustrate the extent of change. In 1998 I produced the first series of *Sumo*. Although none of the content had been viewed, Channel Four arranged a large press/publicity screening. Just before the screening began, Adrian Metcalf, the commissioning editor, quietly called me over: "Mike, the programmes are okay, aren't they?" Fortunately they were well received. Spooling forward to 2012, as noted above and as relayed in 2013 by a senior producer who was present throughout, Channel Four convened a press conference to announce the line up of presenters for their 2012 Paralympic coverage. The commissioning editor and production teams had worked for some time to compile these teams, including screen testing them on various Channel Four programmes. Following the press launch Channel Four's chief creative officer, Jay Hunt, unilaterally decided to make wholesale changes to the line-ups. This case illustrates the underlying importance of sports presentation to a channel, plus how an increase in the number of editorial decision makers in the programme production chain tends to diminish the influence of the producer.

## **Conclusion**

Chapter 8 addressed the second part of the third research question: how do upstream pre-production processes impact on independent sports television production, from company-level activities to the shop floor and the day-to-day work of sports producers and directors? The chapter added a micro-level view to the supply side oriented perspective provided throughout this research. The chapter also fills a gap in the literature describing contemporary television sport production. Reasons why transformations in television sports production discussed in part two have not resulted in a creative heyday for sports producers and directors were examined. Instead, it was noted that inhibition and prescription have become recurring themes in television sports production.

The chapter opened with an introduction to the UK independent sports production sector. Independent sport production companies face several significant challenges: 1) they do not usually hold any sports broadcasting rights, 2) they do not have direct access to audiences, 3) operations are usually on a small scale, 4) companies are increasingly controlled by private equity firms or are part of larger independent media groups, and 5) the cyclical nature of sports rights means winning competitive tenders for production services is a vital and costly activity.

The commissioning process for independent sports production services was reviewed. As they seldom hold rights (even secondary rights) independent sports production companies sell their production services at costs plus a percentage fee primarily to broadcasters but, increasingly, directly to

leagues and federations as these organisations extend their own production operations. The different demands made by content commissioners were discussed. In important ways these demands can be considered just as influential as technology in shaping the final output we see.

A number of factors, including a substantial increase in demand for content and the prominence of live sports broadcasting (with its increased technical and logistical complexity), when added to the limited scope of output offered by most independent sports production companies has created considerable pressure to specialise in the sports that they cover. The question of whether *replication* had become more important than *originality* was raised. The tension experienced between (a) providing a more standardised international coverage for federations or (b) more localised presentation for broadcasters was discussed. It was argued that the introduction of standardised and approved coverage by federations is a new kind of content - a new media-sports product - and another important step in the commodification of television sport. As sports television is increasingly assimilated within the growing marketisation and promotional culture of sport, independent sports production companies, producers and directors have to *play by the rules, or not play at all*. This condition is one of the most fundamental changes to television sport production in the past decade.

The chapter concluded by identifying further specialisation in television sports production: the emergence of production management. Marked divisions between editorial and operational management in downstream content provision were discussed including the tensions felt on both sides,

by producers and production managers. The tendency for senior production management roles to benefit from staff positions, whilst producers and directors are increasingly engaged on short-term project-specific contracts was identified and a further power shift away from producers was noted. How increasing layers of approval that producers are required to navigate through was provided in 2 examples from Channel Four. Overall, sports producers said they felt their role was diminishing.

Throughout this research it has been argued that the activities of sports federations and leagues need to be more fully accounted for within a political economy perspective of television sport. Having reviewed upstream activities in part two, chapter 7 identified several additional ways that league and federation activities have a *direct* impact on the downstream supply side.

Chapter 9 provides the conclusion to part three and to the research as a whole.

## 9 | Conclusion

Despite its prominence and popularity among viewers, television sport remains an under-researched area in media studies and is a subject that lacks a ready-made theoretical context. Although this presented a challenge, a number of important themes recurred in the literature, including ideas about value, commodification, transformations, power-relationships and the emergence of a profit-motivated sport-media-corporate axis. As a result, an adjusted political economy approach was adopted to answer 3 primary questions:

- 1) Whilst sports and broadcasting systems in the US and UK started from diametrically opposed positions post-World War II, why have the similarities between them, including the adoption of a more overtly consumer-oriented approach in the UK, become the most noticeable features?
- 2) How do three often unseen upstream pre-production processes – technology, broadcasting rights and regulation - increasingly influence what television sport looks and sounds like, where it can be seen and who can see it?
- 3) How are upstream pre-production processes manifest downstream on the supply side in terms of (a) broadcasters (including *who* provides sports media) and (b) independent sports television production, including the day-to-day work of sports producers and directors?

The adjustments to a political economy interpretation involved identifying what, in my view, are two critical perspectives currently missing from discussion: 1) the central role of sports federations, ranging from the “peculiar economics of sport” (Neale, 1964) through to federation run host broadcast operations for major events; and, 2) a relevant micro-level analysis of downstream supply-side activities following the trickle down effect of significant upstream transformations. This new perspective complements the big picture often presented by political economists. It was argued that important transformations in technology, broadcasting rights and regulation have radically changed the television sport landscape in the UK. How these factors have evolved and how they combine goes a long way to explain (a) what sport we see on television, (b) where we can see it and (c) what the final output looks and sounds like. The sheer extent of these transformations was also illustrated.

The battle to control broadcasting rights and subsequent television output was set against the increasing commercialisation of sport and the marketisation of broadcasting. Given the scale and speed of transformations, many of the outcomes have not yet been researched, for example:

- a) The expansion of federation-based activities. This now includes host broadcast production (providing sympathetic coverage for global audiences) and branded-content channels with extensive international distribution networks.
- b) A general increase in detailed production prescriptions provided to rights-holding broadcasters as a key part of broadcasting rights agreements.

- c) When international coverage from major sports events is provided by the organising federations how broadcasters increasingly concentrate on presentation (as approved global feeds are localised and branded by broadcasters for their domestic audience). In addition to presentation style, additional services (like red-button options or online channels) are used to provide a further point of difference from other broadcasters.
- d) How independent sports production companies, including individual producers and directors, increasingly offer specialised production services.
- e) The ultimate requirement: that all sports production companies, producers and directors *play by the rules or don't play at all*.

The arrival of digital technology in the mid-1990s accelerated and intensified these processes. Mason (1999:403) argues that sport has commodified as it has become increasingly bound up in the processes of economic production and distribution. Looking at sport as a media product, it can be argued that intellectual property rights have been used to “inhibit rather than encourage creation and creativity” (Haynes, 2005:10) and, overall, there is a “danger based on the quiet accretion of restrictions” (Drahos and Braithwaite, 2002:4). Seen against the rising tide of wider neoliberal values, where the neoliberal project involving the “financialisation of everything” (Harvey, 2005:33) and “accumulation through dispossession” (Harvey, 2005:159) is apparent, then commercial values and the market are the driving forces in the digital era of television sport.

Summarising this research, part one provided a back-story missing from the literature, as the development of sport and television in the US and UK between 1945 and 1995 was compared. Despite starting from virtually opposite positions post World War II, and as “the rule of amateurs kept capitalism at bay in British sport” (Holt, 1989:281), sport was poised between an idealised past and a commercialised free-market future. This proved to be a mismatch. As sport disengaged from the wider social and cultural meanings that had kept it firmly anchored, in the race between money and meaning there was only ever likely to be one winner. When the tide turned, in the 1980s, it did so quickly and sport and television became realigned along commercial and consumer-oriented structures more typically seen in the US. Today, the Premier League demonstrates unprecedented levels of corporate organisation and profit-driven motivation, even surpassing some of the activities of the NFL, a league that had set the benchmark for commercial activity for more than 3 decades. The undertow of part one was how a trinity of technological, economic, and political forces began to combine in various ways to create a world where what is good for business is considered to be good for us all (Harvey, 2005:117).

Understanding the shift in market power, from the broadcasters (downstream) that bought rights to the sellers (upstream), requires engaging with league and federation behaviour. Changes can be mapped in 7 important developments.

- 1) The NFL was the first professional sports league to understand the importance of (a) the collective sale of sports broadcasting rights (cartel behaviour), (b) providing league-wide sporting equilibrium

(competitive balance and uncertainty of outcome) and (c) exercising its market power to collect this value. This took the form of rationing broadcasting rights that, in turn, created scarcity. As there was no effective substitute for the NFL it became a seller's market. The price of NFL rights rose steadily from the 1970s.

- 2) The next step came in the late 1980s when the NBA overtly allied its sport media product to entertainment values and celebrity endorsements that, together, helped to create (a) a global NBA brand that was exported worldwide, and (b) to propel the increasingly commercial culture of modern sport into the mainstream.
- 3) The formalisation of global corporate sponsorship as a viable alternative to advertising in the 1980s was another critical development that had a profound impact on the growth of global sports events, including the Olympics and the World Cup Finals. The amalgamation of sport, television and corporate interests into a *single package* was commercially successful and, from the landmark 1984 Los Angeles Games, the IOC moved forward on a more aggressively commercial basis as it sought ways to deliver a television product that was entirely sympathetic to the requirements of its preferred sponsors (The Olympic Programme, TOP). Similarly, FIFA increased its revenues from advertising, sponsorship and broadcasting rights from the early 1980s, with the biggest gains coming from 1986 onwards.
- 4) Marketing activities also changed federations' view of audiences. In the 1980s and 1990s as it sold its broadcasting rights into more international markets, Formula 1 began to focus on global rather

then local audiences. F1 actively sought a consistent television output across an entire season, moving from race to race and country to country. Although Formula 1 could not make a commercial success of its own pay-TV coverage, it did begin to re-define television-sport relationships, particularly where federations would play an increasingly significant role in identifying and delivering standardised coverage of their own events for global audiences. F1 was also at the vanguard of identifying increasingly specific conditions under which its events could be broadcast.

- 5) Under acute commercial pressure from Europe's leading clubs, the UEFA Champions League was launched in 1992. Working with TEAM Marketing AG, many of the lessons learned by the IOC, FIFA and Formula 1 were re-articulated. As a formal obligation, UEFA required all rights-holding broadcasters to comply with the prescriptions set out in its Production Manual. The UEFA Champions League Production Manual set a new benchmark when attaching conditions to sports broadcasting rights and imposing these requirements on broadcasters' output.
- 6) The creation of the Premier League in 1992 signaled the most rational approach to capital accumulation so far by any British sport. With its corporate structure and commercial autonomy, the Premier League is driven by an unambiguous profit motive. In some important ways it can be argued that the Premier League has become even more commercial and profit-driven than the NFL, both in terms of its structure, where members act as shareholders, and the revenues for broadcasting rights it has achieved globally.

- 7) The emergence, around 2005, of federation run host broadcast operations at major sports events is very significant. Approved and non-controversial coverage for global audiences was now delivered to all rights-holding broadcasters.

Between the mid-1980s and mid-1990s, elite sport had come to matter a great deal to big business and to managers of increasingly commercial and global media industries. "Sports now stress the need to be business like and efficient, offer sites for the celebration of corporate capitalism... and, in general have become prime sites for the construction and reproduction of an entrepreneurial culture", concluded Whannel (1992:208). Boyle and Haynes (2000:222) added that sport, for the media industries, "offers a product, which can be transformed into a valuable commercial entity delivering readers, viewers, advertisers, customers and subscribers. Sport, it appears, is often only too happy to oblige as a willing victim in this process." Following this trajectory, Falcous (2005) found that professional sport had become realigned with the interests of corporate investment and the managerial tenets of advertising, marketing and public relations. A new sport-media-corporate axis had emerged.

Part two considered how a trinity of influential pre-production factors, technology, broadcasting rights (economics) and regulation (politics) have been instrumental in transforming television sport since the early 1990s. This is the first interpretation that considers both the interaction and collective impact of these factors on the development of television sport.

Chapter 4 focussed on technological transformations. On the production-side, the increasing prominence of live sports broadcasting, driven by the arrival of Sky Sports in 1992, was not based on new technology so much as on using more of the existing technology in new ways. Via encrypted satellite transmission, a solution to market failure was found by charging customers monthly subscriptions to access encoded signals, as popular sports became *private goods*, hidden from general access behind a pay wall. For Boyle and Haynes (2004:20), this marked the transformation of viewers from citizens to consumers. Aligned to an aggressive marketing strategy, the new Sky Sports style adopted several overtly US methods and continued Roone Arledge's close up and personal philosophy. Rising to levels of importance found in the US, *live* sports broadcasting soon became the definitive form for television sport in the UK.

Although transmission operations at broadcasting networks were among the first areas to adopt automated digital systems - utilising software and media server solutions capable of scheduling and transmitting multiple channels to numerous territories and time zones *at the same time* - the transition to a fully digital and tape-free workflow was not straightforward. In 2014, a lack of common standards remains problematic. By contrast, the arrival of digital production technology, new workflows and much faster ways of working, dovetailed perfectly into a reconfigured television sports environment; potential output was radically transformed. Whilst large volumes of media could be quickly transferred between locations, it was the capability to allow *simultaneous* access by *numerous* clients (users) to the same *original material* that was revolutionary. 2 important phases for technological transformation can be noted: (1) between 1994 and 2004 key non-linear

editing and tapeless media technology was rolled out; introduced to production workflows this technology enabled a greatly increased volume and scope of sports content to be produced much faster than ever before, and; (2) from 2004 onwards, how sports federations, including the Premier League, were able to harness the potential of new technology and digital workflows to produce, under their own control, a guaranteed standard for global output that was closely aligned to their own brand values. In this case it is not the technology itself, but *who* uses the technology and *why* that is most significant. The mid-2000s saw federations move the goalposts as they took charge of their own television coverage at major sports events.

A new case study considered the Premier League's production arm, Premier League Productions. Reviewing new workflows and massively increased output revealed how a *single minute* of live football action is transformed into *11 minutes* of programming designed for worldwide consumption delivered via a dedicated channel offering 168 hours of Premier League content each week. Operating at an entirely new level of commodification, Premier League Production's digital output represents a quantum leap from the BBC's 1992 analogue-based Match of The Day operation.

In contrast to fast moving developments in technology, including the capacity to create more content, more quickly for use on more platforms, any discussion of broadcasting rights tends to involve a rapid deceleration; rights are usually about what you *cannot* do as a broadcaster or producer. A great deal of commercial sensitivity, even secrecy, surrounds broadcasting rights. However, the way that broadcasting rights are issued, alongside increased competition from broadcasters to acquire the most popular rights,

has seen market power move upstream to the leagues and federations that collectively own the rights. A key contribution here is an examination of how prescriptive conditions are frequently added to broadcasting rights by league and federations, reinforcing their dominant position.

Chapter 5 opened by reviewing the nature of intellectual property, including (a) how intellectual property knows no bounds (Haynes, 2005), (b) the often confusing idea/expression dichotomy and (c) the tendency of copyright to be defined by market-driven principles that demarcate who owns what. Without a homogenised approach to international copyright, individual states sanction and regulate intellectual property rights. The utilitarian, market-driven principles of copyright (and how they are interpreted by contemporary global media companies) have increasingly become the *de facto* understanding of how media rights are valued, organised and distributed. In terms of sports broadcasting rights in the UK, values began to escalate from the late 1980s. Using the Premier League as an example, factors that shape value were explained and the different ways that rights are broken down (by range, distribution platform, broadcast territory and period of license) were discussed, including the revenues achieved for Premier League broadcasting rights. As the cost of sports broadcasting rights escalate, a corresponding increase in the risks associated with acquiring such rights was identified, including the consequences of over valuing or losing important rights. The rising tide of commercialism in UK sport provided the backdrop for increasingly intense battles to acquire the most appealing sports broadcasting rights.

However, among concerns raised in the application of intellectual property rights is what Drahos and Braithwaite (2002) describe as a “quiet accretion of restrictions”, or what Harvey (2005:159) has, in more general terms, called “accumulation though dispossession”. For television sport, these are largely unseen activities manifest in an increasing number of prescriptions that are now applied to production. How leagues and federations have exercised their market power through typical prescriptions was illustrated with two case studies from Formula 1 and the UEFA Champions League, with its extensive Production Manual.

The third pre-production factor that influences what sport we can see on television, including who makes the final programmes we see, is regulation. If broadcasting rights can be considered to follow one cycle (typically 3 years) behind developments in technology, then regulators and competition authorities in the EU and UK can be seen to follow a further step behind. For Boyle and Haynes (2004:52) “a re-regulation of broadcasting is taking place within a more commercial and market-driven frame of reference”.

Attitudes towards regulation differ in the US, UK and Europe. For Jeanrenaud and Kesenne (2006) sport in the US is seen as a commodity that can be redesigned as required, whereas in Europe sport is considered part of the cultural heritage – sport cannot be reduced to an audience-generating mechanism alone. Following deregulation in the UK, market forces increasingly determined broadcasting markets.

For sports broadcasting rights, intervention involves (a) listed events legislation (first adopted in the UK in 1954 and later championed by the EC

from 1996) and, as Evens, Iosifidis and Smith (2013) note, (b) the application of competition law to correct market failure and address the market power of dominant pay-TV broadcasters. It was EC intervention that finally ended BSkyB's monopoly hold on exclusive Premier League broadcasting rights in 2005. However, as a result there was a significant escalation in rights fees paid to the Premier League. The cost to consumers who wanted to watch Premier League football also increased. These were probably not the outcomes initially sought by intervention. Lying outside the protected list of events the activities of the Premier league and UEFA have attracted considerable scrutiny; questions about the ultimate usefulness of the outcomes were raised.

Even within literature on regulation and competition, the picture remains frustratingly incomplete. From the programme supply side there are further dimensions that should be considered, including: (1) significant areas apparently not covered by regulators and competition authorities (including the extended activities of leagues and federations as they provide coverage for major sporting events, or run their own international channels) and, (2) the effects of regulation that impacts *directly* on production, following (a) the regulation of content, (b) regional and independent production quotas and (c) recent EU employment legislation such as Transfer of Undertakings (TUPE) – these issues were described by contributing experts as having a “massive impact” on independent sports production. These were discussed in chapter 6.

Two examples from the US were considered relevant in finding a solution.

The US leagues have adopted several voluntary forms of self-regulation and,

whilst this is not the case in the UK, this may be a useful area to explore in the future, particularly as UEFA introduced Financial Fair Play rules for the 2013-14 season. Even without a list of protected events, the US Major Leagues have not migrated to pay-TV but, instead, have maintained a strong presence on the 4 commercial free-to-air networks. Although the US market is much larger than the UK and the ownership of rights to all 4 major leagues by any one broadcaster is, for cost reasons alone, highly unlikely, in general terms Evens, Iosifidis and Smith (2013:228) conclude the increased exposure and higher audience ratings via free-to-air television in the US example *can* serve the interest of teams, leagues, broadcasters, advertisers, sponsors and viewers alike.

It was concluded that there were some troubling gaps between the potentially valuable underlying intentions of intervention and the practical outcomes it delivered. As Boyle and Haynes (2004:165) put it: "regulators strive to keep pace with a digital mediascape which threatens to perpetually run ahead of regulatory frameworks". As moves by federations to take control of their own host broadcast coverage, and leagues to distribute their own global content, could leave regulators even further adrift, it was argued there was a need for new ways of thinking about regulation, including looking at (a) the solutions adopted by the US leagues and (b) how leagues and federations might consider the example set by the German Bundesliga, where the game is considered to be a *public good* and where football, not the exclusive pursuit of financial revenues, remains at the heart of all club activities.

Part three addressed a further gap in the literature by providing a micro-level analysis of the contemporary programme supply-side, including important challenges faced by broadcasters and independent sports production as the effects of transformations in technology, broadcasting rights and regulation trickle down to the television sport workplace. For broadcasters the challenges include: (a) the increasingly close relationship between sports broadcasting rights ownership and the commercial performance of large media firms (for example BT Sport and BSkyB), (b) the consequences of federation-based host broadcast coverage for major events and how, (c) this has created a division between event *coverage* designed for global audiences and *presentation* for local audiences increasingly offered by broadcasters. Additionally, (d) how increased demand for sports content has failed to deliver any meaningful critical comment was noted; for Boyle and Haynes (2000:107) television knows “that it must not kill the goose that lays the golden eggs”.

In an oligopolistic market structure, changes in sports broadcasting rights ownership directly impact on the economic performance of competing companies; the growing significance of corporate performance suggests the way in which sports broadcasting rights are valued is becoming more complex. As the escalation in prices paid for sports broadcasting rights show no sign of slowing, the possibility of encountering *winners curse* increases; of bidding too much for rights. The expanding portfolio of international sports rights acquired by Al Jazeera (also trading as beIN) was noted by several expert contributors. An interesting scenario could play out if, sensing a commercial opportunity, a very large company like Google or Microsoft were to enter the market for broadcasting rights and potentially

change the viewing paradigm, this view concurs with Evens, Iosifidis and Smith (2013).

The emergence of federation-based host production operations is one of the most significant recent developments in television sport, as it changes the rules of engagement with broadcasters and producers – in a sense an intermediary level of production has been removed. The IOC, FIFA and UEFA now seek control of *every aspect of production* as they provide a dependable and sympathetic international feed of coverage to all rights holding broadcasters. In doing so, the line between what is best for advertisers/sponsors and broadcasters becomes increasingly blurred. Gruneau and Cantelon (1988:347) note how the Olympics have become a market-oriented project where “a more fully developed expression of incorporation of sporting practice into the ever-expanding marketplace of international capitalism is now manifested”. It is argued that federation-based production is a *critical new phase* in television sports production, one that illustrates the continuing migration of power upstream to the leagues and federations.

As broadcasters respond to federation-based host broadcast operations that deliver approved coverage, and with increased amounts of coverage bought in from other broadcasters to fill expanding television sports schedules, then the importance of *presentation* as a distinct aspect of production activity has increased significantly in the past decade. Whilst the BBC is frequently beaten in commercial competition to acquire sports broadcasting rights, the corporation, in 2014, still has access to the Olympics, World Cup Finals and Euro Championships. However, coverage of major international

sports events are now provided by the federations via their own host broadcast operations. This has released the BBC to concentrate its efforts and resources on the presentation of major events. Presentation is the shoulder programming that wraps around the provided international coverage and that, importantly, the BBC localises for UK viewers. Presentation is also a means to differentiate broadcast output and to build a recognisable brand identity. The BBC has retained a plausible position as the broadcaster that can deliver a shared viewing experience for large numbers of British viewers. Presentation is one of the remaining areas where broadcasters still retain substantial control, so is of particular interest.

Why transformations in television sport did not provide a foundation for a creative heyday for sports producers and directors but has, it was argued, “inhibited innovation and creativity” (Haynes, 2005:10) was addressed in chapter 8 and the day-to-day work of independent sports production companies.

Independent sports production companies face several unique challenges: 1) they do not hold sports broadcasting rights, 2) they do not have direct access to audiences, 3) operation is often on a relatively small scale, 4) companies are increasingly controlled by private equity firms seeking short-term returns, or are part of larger independent media groups, and 5) the cyclical nature of sports rights means that winning competition tenders to provide production services is a critical concern. Given their already limited scope, these factors encourage independent sports production companies to specialise.

Unlike other areas of independent production, sports production companies tend not to hold even secondary rights so they sell their services at costs plus a percentage production fee. Their primary customers are broadcasters but, increasingly, leagues and federations also seek short-term production expertise to support their host broadcast operations. The different demands of federations (reaching a global audience, non-controversial output, often very prescriptive) and broadcasters (local audiences, increasingly focussed on presentation rather than coverage, occasionally more creative) are significant and, in several important ways, these demands are extremely influential in shaping the final output.

A number of other factors, including (a) substantial increase in demand for sports content and (b) the prominence of live sports broadcasting (including technical complexity and logistics) when added to (c) the limited scope of output usually offered by independent sports production companies, generates further specialisation. In these circumstances questions include whether *replication* is now more important than *originality* in television sports. As sports television is increasingly assimilated within the growing marketisation and promotional culture of sport, it was argued that broadcasters, independent sports production companies, producers and directors now have to play by the federations' rules. This is one of the most fundamental and important changes to television sport in the past decade.

Further evidence of specialisation is found in the emergence of production management. Over the past decade, as production managers have taken over many responsibilities previously held by producers, a marked division between *editorial* and *operational* management in television sports content

provision is evident. The tendency for senior production management roles to occupy a limited number of core staff positions at independent sports production companies, whilst producers and directors are increasingly engaged on short-term project-specific contracts indicates the role of sports producer is, in general terms, diminishing. Whether a result of adjusting to the needs of having more clients, the growing importance of sports rights to broadcasters or simply the centrality of broadcasters presentation strategy, virtually all producers interviewed noted they were required to navigate through more levels of supervision and approval than in the past. The universal message from sports producers and directors was that of increasing specialisation and prescription in their work, with less and less room afforded for creativity. Describing what it is like to work for a federation, memorably one producer said: "the difference is like living in a democracy and living in North Korea". Even allowing for some exaggeration, the differences are not subtle.

### **The paradox of television sports production**

Boyle and Haynes (2000:38) wrote: "a history of sport is often presented as a history of televising sport". On the subject of television sport they add: "what is significant is the scale and the intensity that now exists within this relationship and the rapid pace of change which characterises the media and sporting industries" (2000:x, preface). 14 years later, the intensity and pace of change has accelerated to unprecedented levels as the leagues and federations that run sport have become increasingly powerful and ever more prescriptive.

Following the landmark 1990 Broadcasting Act, 1992 was a pivotal year in the transformation of television sport in the UK - BSkyB launched with live and exclusive coverage of the newly formed Premier League and the UEFA Champions League format was rolled out with its Production Manuals and embedded sponsorship model. The mid-2000s provided another critical turning point as new digital technology, intellectual property control and lack of applicable media regulations allowed leagues and federations to seize even more control of television sport through host-broadcast operations and providing their own brand-name sport channels for widespread international distribution. Tunstall (1993:72) was concerned that the prominence placed on technology and logistics in television sport could diminish the journalistic value of the content. In 2014, what journalistic value that does remain appears to have migrated from standardised international coverage designed for global audiences to the presentation offered by rights holding broadcasters as they repackage and brand events for local audiences.

As a participant-observer who has worked through this entire period, television sport has entered a particularly paradoxical phase. On one hand the technical capacity and specialist production skills deployed in capturing and conveying elite sports performance on television, particularly in the UK, US and at major global events, can produce breath-taking coverage; incredibly detailed sequences and atmospheric audio that combine in unforgettable programmes showcasing a wide range of human performance, drama and emotion. At its best, television sport can be captivating, compelling and memorable. On the other hand, even the most outstanding coverage can quickly become one-dimensional as it seeks to avoid all

controversy and provide the most sympathetic and uncritical coverage on behalf of the host federation and its key sponsorship partners. Whilst there have been enormous increases in the volume of sports television coverage, including more scope than ever before, the overall gravitational pull is towards generating more and more standardised global television sport products. It has become the role of rights-holding broadcasters, should they be motivated to do so, to localise this coverage via presentation defined by their editorial approach, style and on-screen talent. Above all, this is an era where criticism of leagues and federations is not encouraged – with so much money invested in winning and retaining popular sports broadcasting rights, or in winning production service contracts, who dares to bite the hand that feeds?

As Boyle and Haynes (2004:167) point out, sport has a remarkable ability to re-invent itself as new technology has come along. Similarly, the battle to control sport is not new, although, it is argued here, that the battle has entered a new and more intense phase where the leagues and federations have become even more dominant. Today's extremely sophisticated television sports coverage, drawing on an unprecedented arsenal of digital technology, high-capacity workflows and battalions of ever-more specialised producers and directors, has one objective: to remain in thrall to sport. A political economy perspective asks if a working balance can be found between short-term gain and long-term wellbeing, between local and global priorities and, most of all, between making money and cultural/historical meaning? Until some checks and balances can be restored – and I have argued that these should come from the leagues and federations - then

contemporary television sport will be ever more closely aligned to elite sport's wider global marketing objectives and profit targets.

Since 1992 television sport in the UK has been totally transformed; the goalposts have moved and the rules have been changed. As it continues to attract mass audiences, there is little doubt that live coverage and subsequent presentation of elite sport sets new standards for scope and sophistication, for technical excellence. The appeal of television sport seems undiminished. However, in the same way that broadcasters are carried along on the bow wave of sport's commercial rapacity, whether they like it or not, whether they admit it or not, today's sports production companies, individual sport producers and directors are all part of this market-led momentum. The message is simple: you play by the new rules, or you don't play at all.

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