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Looking back on Scudamore's reign (1999-2018)

EXECUTIVE CHAIRMAN OF THE
FA ENGLISH PREMIER LEAGUE

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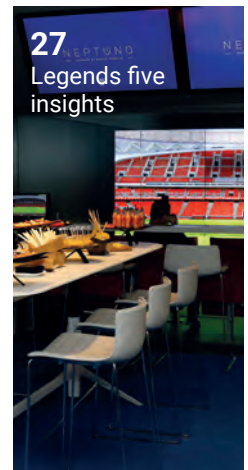


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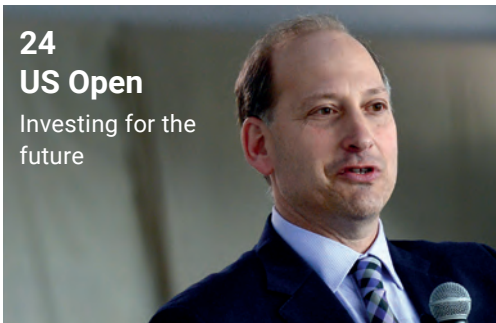


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20 AUG | COLOGNE SPOBIS GAMING & MEDIA

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worldfootballsummit.com/en/



5-8 SEP | MALMÖ EASM 2018

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easm2018.com

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sportelmonaco.com/

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Introducing the SportBusiness Summit

World sport's leading decision-makers and opinion formers will come together in Miami on September 18 and 19 for the inaugural SportBusiness Summit.

The invitation-only conference will fuse SportBusiness' exclusive data and analysis with the unique assessment and overview of the people who shape the business – owners and C-Suite executives of leading international and US sports leagues, clubs, agencies, brands, technology leaders and media organisations.

Specially-commissioned research into various aspects of the sports industry will inform a series of fascinating and illuminating keynote addresses and panel discussions, identifying new opportunities and revenue streams in markets around the world.

Speakers and analysts will draw on years of experience to identify and analyse the research findings and discuss the opportunities for global and domestic business development driven by data, technology and the growing worldwide appetite for sport.

Among the first to join the A-list speaker line-up are Javier Tebas, CEO of LaLiga, Bundesliga International CEO Robert Klein, Philadelphia 76ers COO Lara Price, Keith Bruce of QuintEvents International and renowned sports lawyer Charles Baker. The line-up is being regularly updated.

SportBusiness is perfectly placed to organise and host this must-attend event. Since its launch in 1996 SportBusiness



SportBusiness Summit2018

SEPTEMBER 18-19 • MIAMI

has developed unparalleled access to and expertise in the global sports business and its research has created a reservoir of high-value industry data which enables its team to accurately and authoritatively identify and analyse industry trends across world sports.

Each session will drill down into subjects and issues at the very top of the sports business agenda in a technology-driven market where competition is red-hot but the rewards for those who succeed are substantial. Subject strands on the agenda include new business opportunities in soccer, trends in global media rights, sponsorship, understanding the globe fan base, opportunities and challenges arising from new US sports betting legislation and the strategies of the tech companies shaping the future of sport.

SportBusiness CEO Ben Speight said: "SportBusiness is evolving with the business of sport to deliver deeper insight and enable clients to make more profitable decisions. We are delighted to be hosting our first SportBusiness Summit in Miami and look forward to sharing our own unique, data-led analysis, mixed with insight from some of the industry's leading names to help shape the strategies of the companies attending".

Tickets and hotel packages for the SportBusiness Summit are available now. For details, please visit sportbusiness.com/summit

SPEAKERS INCLUDE:



Javier Tebas

LaLiga President Tebas, has masterminded the phenomenal global growth of Spain's elite football league, massively expanding its global footprint and international rights value and built international recognition of its clubs beyond the established global brands of Real Madrid and Barcelona.



Keith Bruce

Keith leads QuintEvents' new Formula One Experiences organisation, providing experiential, hospitality, travel and ticket packages for all 21 F1 events worldwide.



Lara Price

As COO of the Philadelphia 76ers Lara runs business operations, corporate and team communications, public relations and community engagement programmes. She was the Women in Sports & Events (WISE) Woman of the Year in 2015.



Charles Baker

As partner and co-chair of O'Melveny's Sports Industry Group, Baker played a key role in David A Tepper's \$2.2 billion acquisition of the NFL's Carolina Panthers earlier this year – the biggest sale in NFL franchise history.

He has represented buyers and sellers of sports franchises in the NFL, NBA, NHL, MLB, MLS and many of the major European soccer leagues.



Robert Klein

As CEO, Robert has driven the international position of the Bundesliga as one of the most innovative and exciting football leagues in the world. Prior to this Robert worked for Red Bull Media House, giving him a unique perspective on the global sports rights market, UEFA New Media and NBA Europe Events.

The cool-headed diplomat and all-rounder who transformed the EPL

Chief executive surrounded himself with the best advisors to take strategic decisions

Diplomatic skills essential in persuading league owners of the greater power of the collective

Premier League expected to split up the role in search for a successor



(Getty)

Ben Cronin

Richard Scudamore, chief executive of English Premier League announced he would be stepping down on the same day the organisation concluded the draw-out and some would say anti-climactic auction for its domestic live media rights for the three seasons spanning 2019-20 to 2021-22. Although the league eventually received a bid from Amazon – one of the new tech players it was hoped would stoke up some competition in the market – it failed to surpass the £5.136bn it earned from BT and Sky in the previous three-season cycle.

However Scudamore's legacy is unlikely to be defined by the cooling of the rivalry between BT and Sky brought

about by the cross-carriage agreement the rival firms struck in the run up to the auction, and that his final domestic deal represented a correction rather than a bursting of the Premier League's bubble, after the 70% increase in the value of the rights in the preceding cycle when the two broadcasters were at each other's throats.

This is also the crux of any analysis of the overall success of Scudamore's tenure: how much of the Premier League's extraordinary commercial growth could be attributed to the strategic decisions he took, and how much was he riding a wave that was not of his own making?

"Unquestionably there is an element of riding the wave but then there's nothing wrong with that because

many other people have found that it's actually relatively simple to fall off," says Rick Parry who knows all about the pressures and challenges of the job having served as the original chief executive of the league when it was founded in 1992 and had dealings with Scudamore as one of the Premier League's twenty stakeholders in his later incarnation as the chief executive of Liverpool.

"I think it's universally acknowledged that he's done a really good job," he says. "Obviously the primary objective was in building the worldwide reputation of the league, taking it to new markets, maximising TV revenues, making the league the envy of the world, and there's no question that that's been achieved."

Scudamore announced his departure on the same day Deloitte published its Annual Review of Football Finance allowing commentators to make a more measured analysis of the health of the EPL. Although the report referred to financial results at Premier League clubs for the 2016/17 accounting period – and was therefore based on the previous bumper television deal – they confirmed the perception of a league that was commercially far ahead of its European rivals. Overall Premier League club revenues, the report stated, had increased by 25% to £4.5bn in the period, making the league 86% larger than its nearest competitor, LaLiga.

The statistics compare favourably with those from the time Scudamore joined the Premier League some 19 years ago. Average revenues when he took over in November 1999 stood at £33.48m per club compared with £227.62m today – a more than sevenfold increase in the time he was at the helm.

These figures were overwhelmingly

driven by the huge growth in the value of the league’s domestic and international media rights, the

“Obviously the primary objective was in building the worldwide reputation of the league, taking it to new markets, maximising TV revenues, making the league the envy of the world, and there’s no question that that’s been achieved”

Rick Parry | Former Premier League Chief Executive

economic fount through which all of the other successes of the league flowed. Proof of how important the league’s media deals have become is

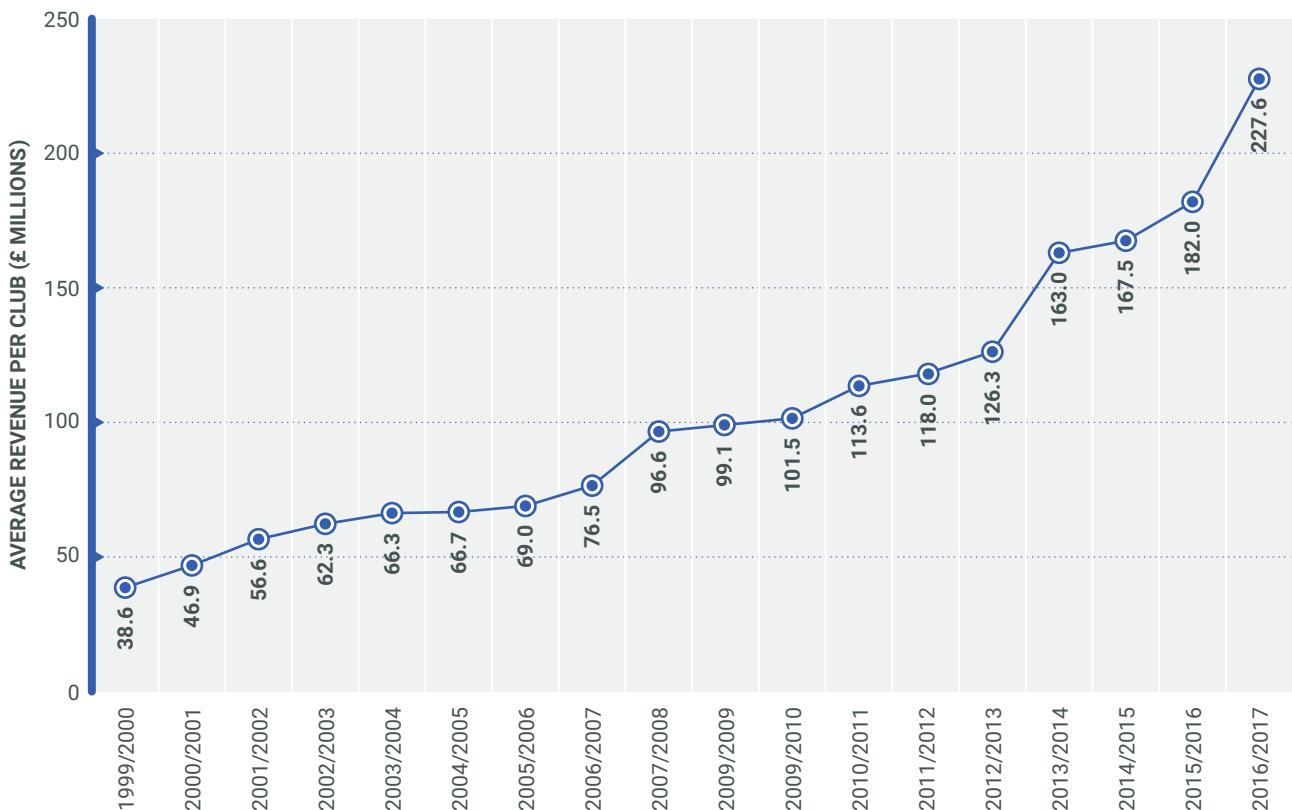
shown by the latest set of accounts in which broadcast revenues made up 61% of club revenues.

Although it would be wrong to put all of the growth down to one man, Parry thinks Scudamore has to take some credit.

“In terms of the UK TV market, for example, it’s always a function of that degree of competition and in a sense the league has been fortunate with BT’s entry into the market,” he says. “But there’s a real skill in keeping that balance, keeping the parties involved, preventing the formation of a cartel and keeping the process honest. So yes, of course it’s driven by what’s happening in the market place but that doesn’t take away from the achievement of maximising the revenue.

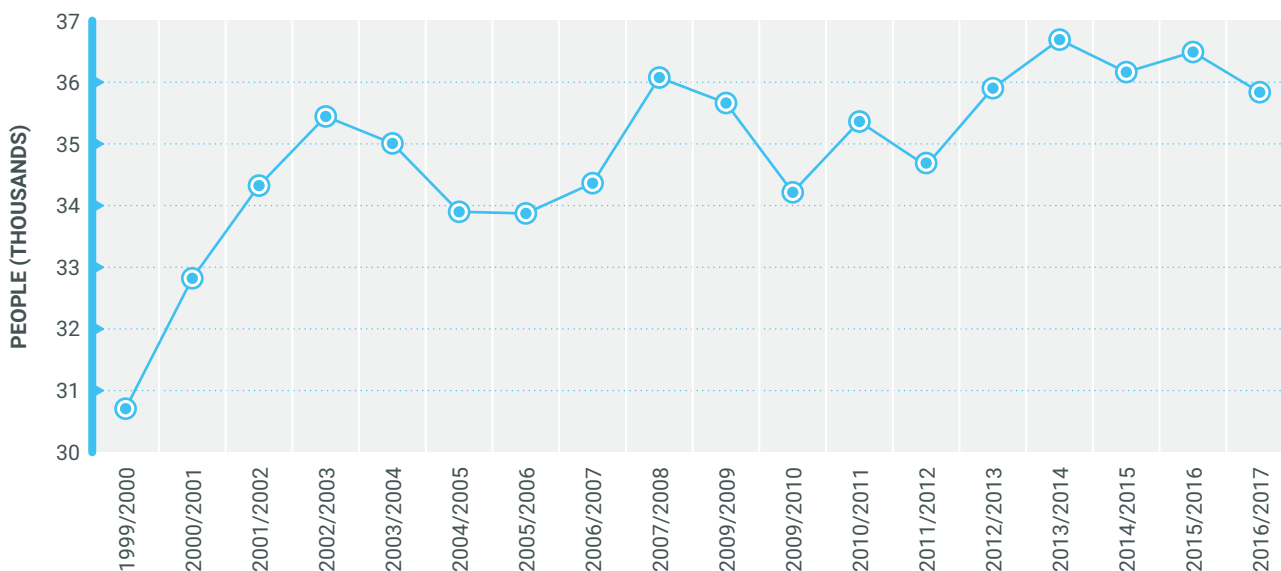
However, Peter Daire, founding partner of sports consultancy firm Sport Collective and a former group head of sponsorship at the FA, argues that it would be wrong to focus too heavily on the media deals struck during the Scudamore years. He thinks

AVERAGE SEASONAL REVENUE PER CLUB



Source: sportbusiness.com

AVERAGE SEASONAL MATCHDAY ATTENDANCE



Source: sportbusiness.com

the outgoing chief executive's greatest legacy is the strength of the Premier League as a competition and a product.

"The Premier League is not a success because it's got big broadcast deals. The Premier League is a success because it's the best league in the world," he says. "The teams that are in it, the players that are in it and the close battles there are every week and the full stadiums, that's what's made it a great product, not the fact that someone's given them loads of money to broadcast it – that's a by-product."

The competitiveness of the league can quite justifiably be put down to its collective structure and the more equitable way it distributes its revenues. Analysis from Deloitte of the ratio between the highest and lowest central distributions to clubs indicates that the Premier League has comfortably the lowest ratio and disparity between the top and bottom clubs of any of the European leagues.

And as the intermediary tasked with keeping the peace between the league's 20 owners, Daire believes Scudamore takes credit for keeping the figure so low and persuading them that they were better served by a more competitive structure rather than by one that favoured the top teams.

"Having to deal with 20 chairmen and changes in chairman is no mean feat at all, it's a really difficult task managing that," he says. "He's an excellent diplomat, he's very sharp and he's got a cool head."

"There's constantly been talk of top-6 breakaways and he's managed to stifle all that but do it with those clubs feeling good about the Premier League and not feeling bitter that they're having to share out funds. They all buy into the strength of the Premier League as a unit."

Recollections from people who worked directly with Scudamore, had business interactions with him, or observed him from a distance, reinforce the impression of a leader who governed by consent rather than force – but also of someone who was prepared to investigate new opportunities and take bold decisions. Not all of the ideas came off, but this did not appear to be to the detriment of the relationship with the clubs.

Phil Lines, who was recruited by Scudamore to head up international broadcasting and media operations at the Premier League, thinks his former boss's skill lay in being an 'all-rounder' who surrounded himself with experts and trusted in their advice.

"He was the best. Richard in my opinion was, or still is, the best administrator in football," he says.

"He is a great all-rounder, he's very strong commercially, but he's equally very strong on the football side. Richard's role encompassed all the commercial activities – media, sponsorship, as well as the running of the league, the relationships with government, the relationships with other sporting bodies and the relationship of course with the clubs. And he was really good at all of that."

So what were the Scudamore's greatest achievements in this diverse set of these spheres, and what, if any, were his greatest failures?

Media rights sales

Scudamore's former media advisor Phil Lines argues that his old boss could be directly credited with creating a formal tender process for the selling of the league's rights and for professionalising the way it took them to market – a sharp change from the legendary days when deals for the league tended to be scribbled on the back of restaurant napkins.

"I think that one of the things the Premier League always had going for it in his time and my time there is that it always had a reputation for being absolutely squeaky clean and running a structured rights sales process – and let's face it, that is pretty rare in football."

Lines maintains that this helped to maintain cordial relations with broadcasters – even when they lost out in auctions – although a former representative of a rival European league who does not wish to be named says it would be wrong to suggest Scudamore didn't upset some partners along the way. He has heard media companies, particularly overseas, tell of how they struggled to develop long-term relationships with the Premier League during the chief executive's reign because of his ruthless propensity to overlook any sense of loyalty and favour the highest bidder in many media negotiations.

"I think they [the Premier League] used every possible tool they had to bring the economic value to the best possible level," he says. "Fox in the US were really disappointed when the Premier League moved to NBC Universal. It was the same in the early years when ESPN Star Sports in Asia drove the growth in Asia really dramatically and then were left out because someone bid more."

There appears to be broader agreement that the boldest and best media decision the Premier League took during the Scudamore era was to bring the selling of its international rights in-house in 2004 – a decision which has been vindicated by the incredible increases in the values of those rights since.

Lines says he counselled Scudamore to take the rights in-house but his former boss can be credited with backing his advisor and sticking to the course.

"I'm not going to name the agency but there was one that twice made us very large offers for world rights and twice he looked at me and said: 'do you think we could do better?' I said yes and twice he backed me," he remembers. "There's not many guys in his position who would turn down offers the size of which were offered to us – and that would have been one cheque, just take the cheque and bank it and move on."

Scudamore would tell sister title *TV Sports Markets* in 2010 that the decision was the one he was most proud of in his tenure up to that date because it allowed the Premier League to develop a more nuanced relationship with and

understanding of the specific needs of its wholesale clients.

The approach went hand in hand with Lines' decision to set up the league's production arm, Premier League Productions, with the help of IMG in 2003, which enabled the league to take control of its brand overseas and allowed emerging telcos to bid for the rights without having to worry about production.

"They tried to build up early the right ground for the next developments on the technology side and on the infrastructure side," says the unnamed source from a rival league. "They built up the international channel, for example, to react to the telco situation. Now they have the achievement to bring in for the first time one of the big internet players with Amazon so they always tried to bring in at an early stage the new generation of media and we should never forget that it's very unusual in comparison to other leagues."

"Attendance No1. Global audience No2. That's it. How many people are turning up and how many people are watching,"

Richard Scudamore | Chief Executive Premier League

But the Premier League's record on international sales wasn't blemish-free under Scudamore. One former Premier League chief executive, who does not wish to be named, says the deal the league signed for its Chinese rights with the Super Sports Media Group (SSMG) agency for six seasons, from 2013-14 to 2018-19, worth \$18m per season, went down badly with clubs. The deal represented only a small increase on the league's previous \$16m-per-season deal in China and tied the Premier League into a long-term agreement just at the point the Chinese market was beginning to rise. The notion that the league had not extracted the maximum value for the rights was reinforced when SSMG subsequently agreed

season-by-season digital rights deals with LeSports, Sina Sports and Tencent, each worth \$18m each.

"There was resistance to the China deal from the big clubs – that was a landmark moment. That was actually the formation of the big six. I don't think it was a value issue, I think it was an oddity," the source says.

"I think the reaction was 'we know values in China are going up, but who knows how quickly they are going up in a rising market in a country that is extraordinarily exciting, why on earth are we selling too early?' That's when the cracks appeared in terms of the big six because that's when six voted against and I think the six started meeting among themselves."

Yet, the same source does not think the latest agreement to give a greater share of international rights revenue to the bigger clubs represents an over-zealous attempt to redress the balance and placate the big six.

"It was a compromise that was necessary to keep things together and it was an 18-2 vote so the majority were happy with what was done."

Sponsorship

From a sponsorship perspective, Peter Daire thinks Scudamore ought to be remembered more for the partnerships the Premier League refrained from signing during his tenure than for the deals it struck.

He is referencing the League's decision not to pursue a strategy of having a title sponsor after Barclays concluded its deal in 2016 and to focus instead on signing category partners.

"Barclays were paying circa £40m a year but when you split that 20 ways it doesn't go very far when you consider what [the clubs] earn for one game on Sky," he says.

The decision gave the league the freedom to create a new brand identity and placated club owners who had partnerships with competing financial services companies or designs on signing sponsors in this category.

"I lived through that. I know how difficult that is," says former Premier League chief executive Rick Parry. "I remember the argument of the major clubs saying you're here to organise

the competition and sell the TV rights and you're not here to take rights away from us.

"We did have aspirations right from the start to have much more centralised sponsorship, to have title sponsors, category sponsors, to be something that looked more like the World Cup or the Champions League but it was never possible. Given the tension that it causes and given the amount of money involved – it is probably 1% of the value of the TV deal – there was absolutely no point in causing unnecessary tension over amounts that are actually relatively small."

Like Parry, Phil Lines is reluctant to categorise the decision as a strategic masterstroke from Scudamore, arguing instead that it was probably led by the clubs, but he does think it was further evidence of the chief executive's tact and diplomacy.

International expansion and the 39th game

The almost unchecked expansion in overseas media-rights revenues for the Premier League tells its own story about the extraordinary success of the competition as an international export. But there is one respect in which the league and Scudamore haven't followed their immediate peers in the NFL, NBA, and now MLB: the failure to take a competitive match, or '39th game', overseas.

But the way Phil Lines remembers it, Scudamore was placed in 'an impossible position' in his attempt to introduce an additional round of matches in the Premier League to promote it internationally and generate revenues from hosting fees and the additional content.

"I was there throughout that," he says. "Essentially when that idea was put to Richard, he couldn't do anything to explore whether it might work or not without the permission of the clubs. If he'd gone off and seen Sepp Blatter or anyone else, without the clubs giving him permission, that would have been a sackable offence. The problem is as soon as he asked the clubs it went public.

Parry, who was the Liverpool representative in these meetings thinks there is an element of 'post-

rationalisation' in this analysis and that the reality was that some clubs were worried that the 39th game would dilute the local identity of matches and that fan sensibilities just wouldn't allow for it.

"Frankly, it didn't make any sense at all. For us, the Premier League was the Premier League in England but I don't think it was a black mark [against Scudamore]. We didn't think it was a good idea, we voted it down and we moved on."

Scudamore would later announce that the Premier League was dropping the idea and argued that the advent of social media and 4K television made it less important to take live games to international audiences. "It was done at a time when we thought it was needed to sustain our commercial growth," he would tell the BBC in 2015. "Clearly the last six years have proven that we don't need to do it."

"I've been saying for a long time that I don't think they'll replace Richard with like-for-like. I think the job's become too big in its present structure..."

Phil Lines | Media Advisor

Peter Daire tends to agree: "The clubs' international expansion is based on success of having really good broadcast deals in those territories where people can watch all of the games and the clubs have been very active now in terms of doing global tours, so I think they get enough Premier League in those countries to keep them happy and it's not needed to be honest."

Match attendances and the fan

Richard Scudamore summarised his measures of success for the Premier League in an interview in 2015: "Attendance No1. Global audience No2. That's it. How many people are turning up and how many people are watching," he said.

To protect match attendances and reduce oversaturation of the media product, he made no attempt to

overturn the blackout which prohibits the broadcasting of EPL matches in England between 2.45pm and 5.15pm on a Saturday. His former media advisor Phil Lines says the sanctity of the 3pm kick-off for other divisions was one of the few areas he disagreed with the outgoing chief executive in the time they worked together.

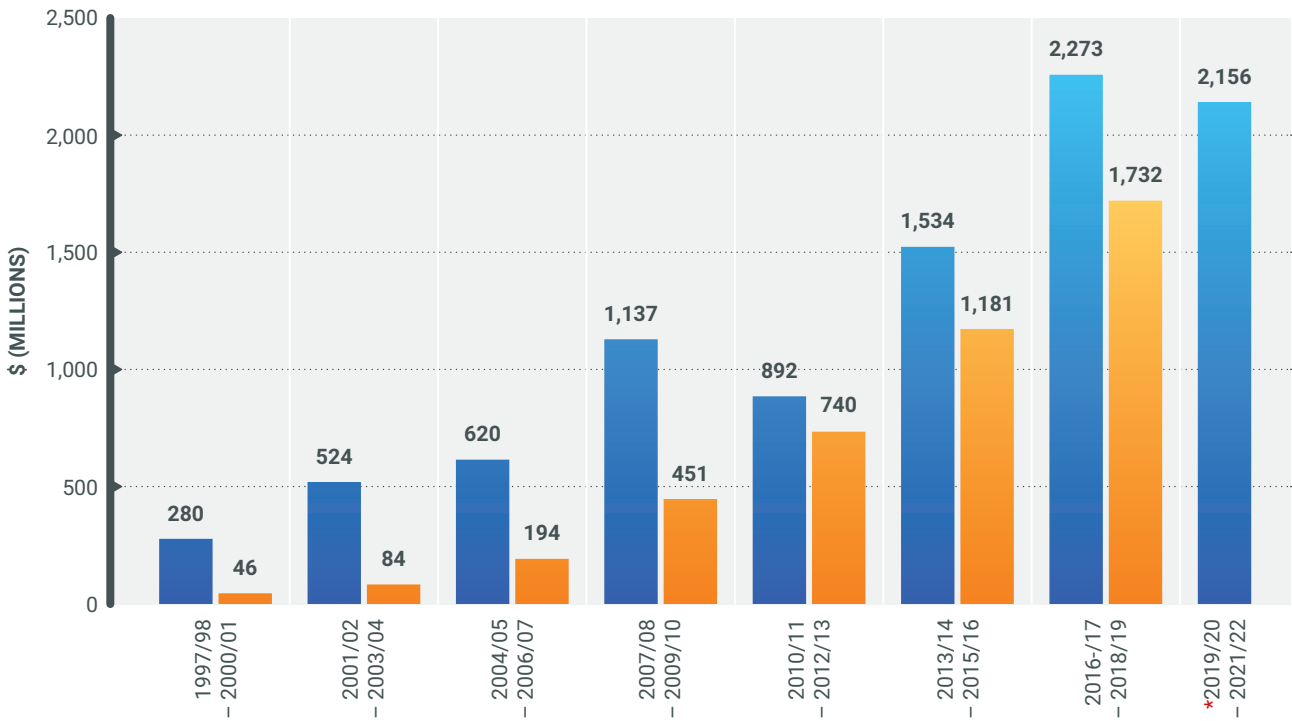
"When I sold the matches internationally, I was selling all 380, and I was a firm campaigner that we should get rid of it," he says. "It always seemed wrong to me that an English fan could go on holiday to Asia and watch all ten matches across a weekend. I don't understand why we don't change that and let everyone watch the matches they want to see.

Scudamore's adherence to the blackout rules had the desired result where attendances were concerned. The latest figures from the Deloitte Annual Review of football reveal that the Premier League had the highest stadium utilisation of any of the 'big 5' European leagues at 96%, up 7% on the previous season, giving an average match attendance of 35, 838. The report said the continued appeal of the Premier League was evidenced by the attendances of three clubs promoted for the 2017/18 season. Attendances increased 18% for Huddersfield Town, 9% for Brighton & Hove Albion and 2% at Newcastle United, after they came up into the league with all three clubs effectively filling their stadiums for every match.

Peter Daire thinks the decision to keep the 3pm blackout also helped to protect the Premier League TV product. He points to the example of Serie A where the decision to televise every single game has led, among other things, to a decrease in attendances which has in turn damaged the league's media rights sales.

Former Liverpool chief executive Rick Parry says it was exactly the right thing to do, to protect the lower-tiers of the game, especially given that 3pm kick-offs would not represent prime-time viewing. "You also have to respect the other competitions, not just football league but grassroots. 3pm is traditionally the time when non-league and amateur is played and respecting

DOMESTIC AND INTERNATIONAL PREMIER LEAGUE MEDIA RIGHTS REVENUE (\$)



● Domestic media rights ● International media rights *No international values are currently available for 2019/20-2021/22.

Figures based on exchange rate from 1st July of the first season, except 2019/20-2021/22 which is based on the exchange rate from when we first reported on the Sky/BT deals.

Source: sportbusiness.com

that as a window when you're not going to be enticing people on TV is exactly the right approach to take," he says.

The increased matchday revenues, and arguably the increased media revenues, generated by Scudamore's philosophy of scarcity led to what the chief executive referred to as the 'virtuous circle' of investment in players and the matchday experience that continued to burnish the product. In the latest set of accounts, total Premier League club capital expenditure in 2016/17 amounted to £395m as clubs like Tottenham, Liverpool, Manchester City and Arsenal continued to invest significant amounts of money upgrading their stadiums or building new ones. The fact that only five clubs spent less than £1m indicated that Premier League clubs were still committed to improving their facilities and the matchday experience.

"The positive thing to say is we've now got the best stadiums in the world in this country," says Peter Daire. "Talking about the bricks and mortar

of the stadium and what's within the stadium, what's around them, it's a good experience. Although it's my personal view that ticket prices at certain clubs are still too high."

However, Scudamore won plaudits from fan groups and proved that the Premier League wasn't driven entirely by commercialism when clubs took the opportunity provided by the last television deal to vote for a £30 cap on away ticket prices.

Scudamore's successor

The Premier League has expanded at such a precipitous rate under Richard Scudamore's leadership that most experts seem to agree that it will need to appoint more than one person to replace the outgoing chief executive.

"I've been saying for a long time that I don't think they'll replace Richard with like-for-like. I think the job's become too big in its present structure," says Phil Lines. "I think it's too much to have one guy running everything - the whole

of the commercial side of the business and rules, regulations and government relationship - and I think probably there's a managerial job and then there's a commercial job."

Parry thinks the Premier League ought to take solace from the fact that neither he nor Scudamore came from business backgrounds that necessarily prepared them for a role at the league. Parry came from a career in management consultancy with no background in football. Scudamore, on the other hand, worked for the Thompson newspaper Group, before briefly working for the Football League between 1997 and 1999.

"If you look back at certainly where I came from and also where Richard came from, we were by no means necessarily obvious choices for the role at the time," says Parry. "You wouldn't have necessarily said we were the identikit that the Premier League was looking for and yet things have worked out tolerably." ○

The Amazon-Premier League deal: for both parties, it's a learning process

Amazon paid between £21m and £30 per season for 20 live Premier League games in the UK

The matches, offered as part of Amazon Prime Video, will have multiple benefits for the company

The retail giant is still in an exploratory phase with sports content



Amazon founder, chairman and chief executive Jeff Bezos (Seattle City Council)

If the importance of a media rights deal can be measured by the number of column inches dedicated to it, the agreement the Premier League struck in June with Amazon for one of two packages of rights unsold in its January auction – telco BT picked up the other – has to be one of the most important ever. Yet coming in somewhere between £21m (€23.4m/\$27.9m) and £30m per season for the period 2018-19 to 2020-21, it will probably be the lowest-value domestic live rights deal signed by a major football league this year. It is usually Amazon running summer clearance sales. This time it was the Premier League.

The retail giant and technology company acquired the rights to 20 Premier League matches per season – 10 per match day on two match days: one on Boxing Day (December 26) and one midweek fixture programme. It will not become clear how many of the 10 games

will kick off simultaneously until the league publishes its broadcast schedule, but it is unlikely that there will be more than three separate slots on each day.

The media frenzy reflects a fascination with whatever the tech giants – Amazon, Apple, Facebook, Netflix and Google – are up to. But also a need for an answer to a question that sports leagues and federations have been asking for at least five years: are these guys ever going to open their cheque books?

Given the nature of Amazon's deal with the Premier League only one thing is clear: we still don't know.

Amazon founder Jeff Bezos has not said very much about how live sports will fit into the company's strategy going forward. He has talked more about space travel. Bear in mind the Premier League deal takes Amazon's spending on sports rights in the last 12 months to about \$100m. It will invest

over \$5bn in original entertainment content in 2018.

The Premier League investment is part of Amazon's toe-in-the-water exploratory phase. In the UK, this also includes ATP World Tour tennis at £10m per year for five years, 2019 to 2023, and US Open tennis at \$7m per year, for five years from 2018. In the US, it acquired the streaming rights to NFL games this season, paying \$50m for 11 non-exclusive games also being aired live on network TV.

Having the Premier League matches will do the following for the company:

Drive subscription revenue. Amazon Prime costs £79 per year in the UK. Having Premier League games could add tens of thousands or hundreds of thousands of new subscribers. Ampere Analysis says the company would need to add 400,000 new subscribers over the term of the contract to make a profit on the Premier League deal, based on the upper-end valuation of £30m per season.

It is estimated that there are currently about 8.5 million Amazon Prime customers in the UK, so there is a huge margin for growth. Free one-month trial offers are expected to be promoted around the match-days. Based on data available in the US, about 70 per cent of those who take a free trial sign up for a subscription.

Drive retail revenue. Amazon’s \$820bn market capitalisation is based heavily on the power and reach of its retail business. Along with cloud computing, it is the biggest segment of a business which generates revenues of \$178bn per year.

Amazon Prime customers spend 20 times more on average than ordinary Amazon customers. They stay on longer and buy more stuff. Attractive content helps with customer retention and increases the number of times subscribers want to visit the site.

According to SportTechie, for Amazon’s live NFL coverage, the viewers who watched at least 30 seconds of a game logged an average of 63 minutes on the website that day, producing total consumption of 12.5 million hours across 224 countries. Average-minute live audience for the 11 games was 310,000.

Having matches in the middle of the Christmas shopping period should maximise related retail purchases. It is timed perfectly for Amazon’s Christmas Day and Boxing Day sales.

Drive advertising revenue. Amazon paid \$4.5m per match for its NFL rights. During each game it was allowed to air 10 30-second spots. It began by asking advertisers \$2.8m for a package of ads but is reported to have settled for \$1m less. The packages also enable the brands to run ads on the Amazon

website in the run-up to the games.

The value for brands is not just reach but the quality of the data Amazon supplies about those engaging with the content. Brands know not only how many people see their ads but what they go on to do on Amazon.com or other websites, and whether they buy something. This kind of data is not something linear television can deliver. Similar advertising packages sold around NFL games on the NBC and CBS networks reportedly go for \$550,000 to \$590,000.

Advertising accounts for an increasingly large percentage of the company’s overall revenue. In the fourth quarter of 2017, the ad business grew to about \$1.7bn, a 60-per-cent increase on the same period of 2016.

Take market share from Netflix. Amazon Prime Video is not a default destination in the same way that Facebook or Netflix is. Amazon wants to change that.

About five million people in the UK regularly use Prime Video, about half the number that use Netflix, but Prime Video take-up is growing faster. It enjoyed a 41-per-cent increase in take up in 2017. Amazon wants to improve on that. Netflix, not Sky or BT, is Amazon’s target and rationale for buying Premier League rights. It does not need 100 matches per season for this. Having any live sports differentiates it from its rival, which has so far stayed out of the sports-rights market.

Worldwide, Amazon Prime now has over 100 million customers and is closing rapidly on Netflix, which had 125 million in April.

Provide a testing ground for delivering high-quality streaming and an entertainment experience that meets viewers’ needs. Armchair fans want

more than just 90 minutes of football. They expect polished presentation and in-depth expert analysis.

Provide valuable data about the viewing and engagement habits of Premier League fans, including evaluating how they respond to personalised ads during match coverage.

Provide a big marketing uplift. Some experts say the media value of the news coverage generated around the acquisition alone could justify the £1m-£1.5m per match cost of acquiring the rights.

Compare the value of output deals with third-party providers with that of owning and producing sports content. As well as buying rights, Amazon has agreed deals to carry third-party sports channels as part of the Prime subscription. In Germany and Austria, for example, it carries the Sport1 channel, the Edgesport action sports channel and the Eurosport Player streaming channel of pan-European sports broadcaster Eurosport. Amazon will be able to evaluate whether carriage deals are most cost-effective than buying and producing premium live sport, in much the same way telcos have been juggling with the question in the last decade or so.

Amazon is opening its cheque book for sports content but cautiously, picking up bargains where it can. The company will take its time, crunch the numbers and then take some more cautious steps. A left-field, multi-billion dollar bid for the exclusive global rights to a football league or a motor sports series does not appear to be in the company’s thinking right now. But if the numbers make sense, within five to 10 years Amazon Prime will be a go-to destination for sports fans everywhere. ○

PREMIER LEAGUE DOMESTIC LIVE RIGHTS (2019-20 TO 2021-22)					
PACKAGE	OPERATOR	NO OF MATCHES	TIMESLOT	ANNUAL FEE (£M)	
A	BT	32	Sat 12.30pm	295	
B	Sky	32	Sat 5.30pm	1,193	
C	Sky	32	Sun 2pm (24); Sat 7.45pm (8)	1,193	
D	Sky	32	Sun 4.30pm	1,193	
E	Sky	32	Mon/Fri 7.30pm/8pm (24); Sun 2pm (8)	1,193	
F	Amazon	20	1 bank holiday, 1 midweek fixture programme	30	
G	BT	20	2 midweek fixture programmes	20	
TOTAL		200		1,538	

Coke-EPL deal could be the Real Thing

Tim Crow says Coca-Cola's rumoured sponsorship deal with the Premier League would be one to watch, and a milestone in the brand's English football strategy.



Tim Crow is the former chief executive of Synergy. Follow him on Twitter @shaymantim

Only time will tell if the unconfirmed reports of a sponsorship deal between Coca-Cola and the Premier League are premature. But a partnership between one of football's classic global sponsors and the world's favourite domestic league would mark another major milestone in Coke's football strategy in England, on which – full disclosure – I advised them during my time at Synergy.

In 2000, when I began working with Coke, the brand's football strategy was at a crossroads.

Coke had enjoyed big brand and business success with Euro '96 and the 'Eat Football, Sleep Football, Drink Coca-Cola' campaign. But having ended its League Cup title sponsorship in 1998, Coke was left with three domestic football assets: a partnership with the FA centred on the England team; a partnership with Wembley (then privately-owned) delivering advertising, pouring and promotional rights; and pouring rights deals at most English clubs.

None of these deals were delivering what Coke needed, individually or together. The FA sponsorship aligned well with Coke's Fifa World Cup and Uefa Euro sponsorships, but the England team couldn't be activated week in, week out. Neither could the Wembley deal, as Wembley was about to become a building site. And whilst the club pouring rights gave Coke a valuable presence, these deals were led by the brand's bottling partners and carried limited promotional rights.

A new strategy was needed. What we created was based on three objectives: get Coke back to being one of one, not one of a crowd; create a domestic marketing asset which was 'always on' during the football season; and above all give Coke brand equity and credibility in club football which, through the rise of the Premier League, had usurped the international game.

These objectives underpinned Coke's football strategy for the next ten years. Phase one, in 2001, was to replace the FA and Wembley partnerships with a three-year broadcast sponsorship of ITV's Premier League highlights.

Phase two, in 2004, was to title sponsor the English Football League, a partnership which ran for six seasons and became famous for two ground-breaking activations: 'Club Colours', when – for the first time in history – Coke changed the colours of its iconic logo, to match

those of all 72 Football League clubs at their grounds, in Coke's advertising, and on specially-produced cans; and the 'Win A Player' and 'Buy a Player' promotions, giving Football League fans – who entered in their millions – the chance to boost their clubs' transfer budgets by £250,000.

But for all that success, six years later it was inevitable Coke would step back from the deal to focus on activating London 2012 – the Olympics being a sponsorship which, for the host-country business of a global sponsor, demands focus and resources like no other. Less predictable was that following London 2012, Coke would rely on its World Cup and Euro sponsorships to maintain its football equity in England.

Which might explain a Premier League partnership. With no major domestic asset to activate throughout the club season, Coke's football equity – a key element of its overall brand equity given how important football is to English consumers – is sure to have declined.

Another influencing factor would be Pepsi's sponsorship of the Uefa Champions League, likely to have boosted its football brand equity at Coke's expense, as well as giving it valuable trading currency with retailers – the most important battleground in the cola wars.

So, if the deal is a premature fact rather than a rumour, what could we expect to see?

For Coke, a buy of this size – almost certainly its biggest investment in a UK sport sponsorship – would make it a strategic priority. Winning in retail to drive ROI will be a focus, led by brand activations designed to make the partnership talked-about, credible, and meaningful. How Coke innovates the standard Premier League IP bundle of club logos, tickets and player imagery will be particularly interesting.

For the Premier League, a Coke deal will mean that it has filled the seventh and final slot in its sponsor roster, three years after it moved away from title sponsorship to a multi-partner model.

And for Richard Masters, the league's managing director, it will be a case of *déjà vu*, as he was commercial director of the Football League when Coke became title sponsor in 2004 – a deal contracted after a 24-hour, through-the night negotiation between Richard and his commercial and legal teams on one side, and Coke's then-sponsorship manager and myself on the other. But that's another story for another time. ○

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All England Club plays the long-game by focusing on brand

All England Club takes over as host broadcaster this year

Production unit helps tournament to dial up Wimbledon traditions

Minimalist sponsorship approach designed to drive up media rights values



James Tally, head of commercial and marketing for the All England Club

Ben Cronin

Meticulously mown grass, strawberries and cream, floral displays and John McEnroe taking issue with a line call. The traditions and imagery that attend the Wimbledon Championships are so familiar and well-worn to the average British person or tennis fan that it might come as a surprise to learn that the famous tournament would ever feel it needed to work on its brand. Yet that is what the All England Club, in its relentless quest for improvement, decided to do two years ago.

Scotching the idea that there's anything parochial about the leadership team at one of sport's oldest and most

famous private members clubs, it commissioned the McCann advertising agency to carry out research into what the world really thought about its flagship tennis event.

Although the findings of the study confirmed that Wimbledon is well-understood in the UK, the US and more mature Northern European tennis markets, it also revealed a lack of awareness about its history and traditions in emerging markets.

"I think British people probably think that it is this amazingly iconic event everywhere," says James Ralley, head of commercial and marketing for the All England Club. "But actually, genuine understanding isn't perhaps as well established as you'd think."

The upshot of the relationship with

McCann has been the In Pursuit of Greatness series of marketing videos that reinforce the exceptionalism of the tournament and its traditions – particularly those that have less to do with the tennis – and build on the sort of affinity even non-tennis fans feel for the event in its core markets.

But the relationship has also reinforced a more fundamental tenet of the All England Club's thinking. Now, more than ever, the primacy of the Wimbledon brand and the need to invest in it, but also protect it, is at the heart of every commercial decision the tournament makes.

Mick Desmond, head of commercial and media for the All England Club, explains how this 'long-term' approach is designed, principally, to drive the

value of its media rights – plus the limited number of sponsorship rights it makes available – as well as to safeguard audiences for the tournament.

“If anything, the top-end sport and the premium propositions that are investing in their brand will prosper, providing they don’t get complacent,” he says. “I think that second and third tier are going to struggle.”

Such a strategy, he argues, is justified in an increasingly constrained sponsorship market where rights-holders are having to work much harder to attract sponsors and a media market where the values broadcasters are paying for premium sports leave less money to go around for second- and third-tier properties.

“We felt like we needed to behave like a global brand but also behave like a media owner,” says Desmond, alluding to the McCann campaign and the decision the tournament took to develop its own in-house production capability two years ago. The All England Club has spent £4m building a new broadcast centre and recruited Paul Davies, the BBC’s former executive producer for tennis, to head up its broadcast operations. This year’s Championships will be the first time it takes over from the BBC as host broadcaster of the tournament – a development which allows it to take control of its messaging.

Desmond explains how the new production operation will allow the tournament to respond, for instance, to research from McCann which revealed why Wimbledon was only the third most popular grand slam in Brazil. The findings indicated that

“Any branding that you see on the court is basically product placement or product or brand integration,” he says. “Again, it goes back to integrity and asking: ‘why is that brand on court?’ Can we look ourselves in the mirror and say, ‘that’s the reason?’”

James Tally | head of commercial and marketing for the All England Club

audiences in the country preferred the more sociable atmospheres of the US Open and the French Open to the ‘stuffy’ ambience of Wimbledon, so the production unit will send Brazilian audiences fewer shots of the Royal box and more coverage of the rowdier and more carnivalesque crowds that watch the tournament from ‘Henman Hill’, (the mound that

sits alongside Centre Court from where general admission fans can watch the tennis on a big screen).

“I always work on the 85-15 principle,” he says. “85% of the global host feed that goes out will be exactly the same. We want it to be high-quality and as beautifully shot as it can be, with storytelling and everything else. The other 15% is the nuance and the market. You have to respect what’s going to be important to a Japanese viewer versus an Australian viewer versus a Brazilian viewer.”

The host broadcast operation will also allow Wimbledon to show coverage of all 18 courts for the first time, meaning it can respond to the need for coverage of specific players for different markets, but Ralley says the freedom it gives the tournament to set up its own beauty cameras and tell stories away from the tennis is of equal importance.

“We will obviously focus on the tennis but we can bring to life the other elements of the event that are so special and make Wimbledon Wimbledon,” he says.

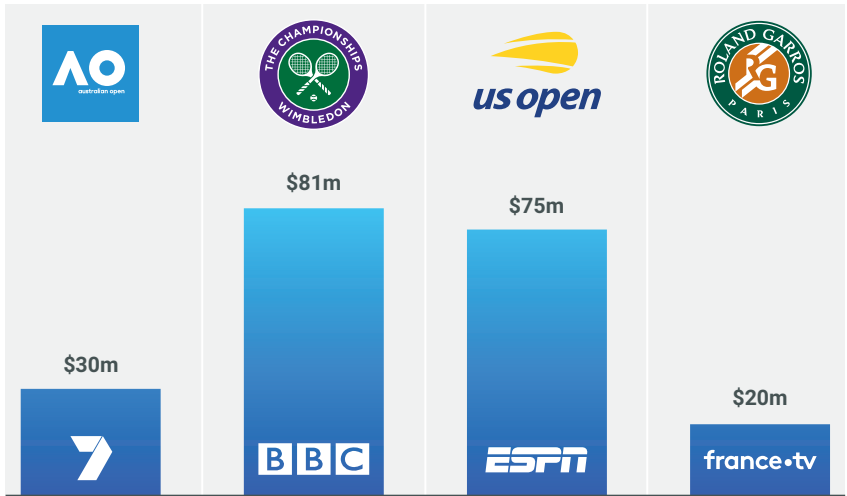
This, he argues, will protect audiences should the next crop of tennis stars be less compelling than the current generation led by players like Federer, Nadal and Serena Williams.

“I think any sport would suffer when you have such huge icons leaving the sport but I think that’s why we’ve begun



Mick Desmond, head of commercial and media for the All England Club

TENNIS GRAND SLAMS DOMESTIC MEDIA-RIGHTS INCOME, 2018



Source: sportbusiness.com

to invest,” he says. “We’re trying to ensure that brand can stand on its own two feet and be as big an icon as the individuals.”

Focus on brand boosts crossover appeal and value of domestic and international rights

Wimbledon’s decision to take its production capability in-house and focus on wider elements such as food, fashion and the look and feel of the grounds will help it build on its position as a crossover event that appeals to non-tennis audiences, says Desmond.

The history and stature of the tournament are already valued by broadcasters, particularly in the US, who also appreciate the fact that it appeals to a 50:50 male and female demographic. “It just brings people in who traditionally probably wouldn’t watch tennis,” he says.

But he is also at pains to stress how the move will help broadcasters cater for core tennis fans. “It’s not just the linear signal, they can take all the content on different platforms. It’s the juniors, it’s the legends, it’s the seniors, it’s the wheelchair tennis. I think there’s more of a demand to fill their air-time.”

The tournament’s policy of meticulously protecting its brand, particularly where sponsorship negotiations are concerned, appears to be vindicated by its overseas media revenues, particularly in the US, the

largest overseas market for its rights. Wimbledon earns \$40m per year from its 12-year deal with ESPN, from 2012 to 2023, a figure that dwarves the \$2.5m per year the Australian Open earns, for instance, from ESPN in the same country.

“The reasons for us being [so popular] in the US are twofold,” says Desmond. “One, we’re long-term established and the Americans love Britain and quintessentially English things and secondly, we’re lucky we sit

“85% of the global host feed that goes out will be exactly the same... The other 15% is the nuance and the market”

Mick Desmond | head of commercial and media for the All England Club

in a fantastic place in the schedule – there’s no NFL, no NBA.”

In an interview with *TV Sports Markets* in 2015, Desmond said Wimbledon’s media-rights strategy was driven by a blend of ‘coverage, reach, going out live, having cooperation and, of course, money’. This standpoint hasn’t changed in the intervening period.

The tournament’s domestic deal with the BBC is an example of the

importance the AELTC places on broadcasters who provide it with the ‘oxygen’ of big audiences, multi-platform viewing and cross-promotion in their other programming.

“We dominate BBC One throughout daytime and up until 6pm and then, depending on the match, they’ll shift the schedule onto BBC Two,” he says. “You’ve got huge, ubiquitous coverage in the week leading up to our championships, we get promoted the hell out of, we’re on their morning programme, we come on the news.”

Desmond says the more live coverage Wimbledon gets, the more the value of the content increases, and disagrees with the notion that Wimbledon would earn more if it agreed a deal with a pay-TV broadcaster in the UK.

“I think we might have [earned more money] two or three years ago, if I’m being candid, when Sky had a very large chequebook and they would throw cheques around,” he says.

“It would be a tough decision to leave the BBC, but we’ve also made sure that we kept the BBC’s feet to the fire in terms of what our value is. And I think in renewing with the BBC we did a very early evaluation that if we were to take it out into the commercial market, what the value would be, so we wanted fair value for it.”

Wimbledon’s four-year deal with the BBC, from 2021 to 2024, is worth about £65m per year, which compares favourably with domestic deals for the other Grand Slams. The US Open earns about \$75m (£56.6m) per year from its exclusive deal with ESPN, from 2015 to 2025; the French Open will earn an average of €19.5m (£17.4m) per year from its deal with France’s public-service broadcaster France Télévisions (2019-2020), while the Australian Open will earn A\$60m (£34.8m) per year from its recent deal with Nine from 2020-2024 (a figure which includes rights to the Australian Open Series of events leading up to the tournament, the Davis Cup and the Fed Cup).

The idea that £65m per year represents a decent value for Wimbledon’s domestic rights is reinforced by the belief among experts that the two-week duration of the tournament would make it difficult for commercial or pay-television



Alexandra Willis, head of communications, content and digital

broadcasters to recoup the rights fee paid by the BBC via advertising or subscription revenue.

The tournament agreed the BBC deal directly with the broadcaster rather than put it to tender, but its approach differs in other markets depending on the competitive dynamics. Desmond points to the German market, where a formal tender is currently out, as an example of its flexible market-by-market approach.

“What we’ve seen in Germany is a disproportionate interest and demand,” he says. “You’ve seen the OTT operators far more pronounced than in other territories. DAZN, which is owned by Perform, has been there for three years, for Amazon, alongside the UK, it’s obviously a second-tier market after the US and you’ve got a reinvigorated Eurosport owned by Discovery, so for us I guess the position’s changed from three years ago when we last put those rights out.”

Amazon’s acquisition of exclusive UK TV rights to the US Open hasn’t gone unnoticed by Desmond and he doesn’t miss an opportunity to use its entry into tennis to stir up competitive tension when he is asked about the company.

“We’ve been talking to Amazon for about 15 months, as with Facebook,” he says, adding that he thinks the US Tennis Association decided to ‘dip a toe in the water’ with the tech giant because it received a disappointing offer from Sky for the rights. He envisages there will be interest from the company in one or two of Wimbledon’s regions that are out for tender in the next 12 months, but also speculates that Amazon might buy an established media company in Europe, such as his former company ITV [Desmond was CEO of ITV broadcasting from 2003-2005].

“I wouldn’t rule out someone like

an Amazon or a Facebook acquiring an established media company, certainly if it’s got a huge production capability,” he says. “What’s going to happen to ITV? Does ITV get bought by one of these European entities to give them a European foothold? I think positive disruption is good for us as a global sports rights-holder.”

“We’ve got great broadcast and media partners around the world. However, we know things change, whether it’s convergence, acquisition, a territory going through a bad time, that we may well have to take a different route to market,”

Mick Desmond | head of commercial and media for the All England Club

The benefit for Wimbledon, however, of taking over as the host broadcaster is that it makes its rights more appealing to operators without their own production capability and enables it to hold onto rights when it doesn’t feel it is getting fair value. It also puts Wimbledon in a strong position to create its own direct-to-consumer offering.

Desmond says Wimbledon has no plans ‘in the very short term’ to create such a platform but says the threat is enough to keep its media partners honest.

“We’ve got great broadcast and media partners around the world. However, we know things change, whether it’s

convergence, acquisition, a territory going through a bad time, that we may well have to take a different route to market,” he says.

“Three years ago, in Russia we had a partner that had been working with us for a number of years, they changed ownership and they took a very aggressive stance towards us and we weren’t suddenly going to give our rights away for a dramatic decline and therefore we created our own channel, we brought in our own Russian talent, we did a deal with a distributor on the platform and actually it performed pretty well.”

Sponsorship strategy leaves money on the table to keep the tournament premium

A signature of the Wimbledon sponsorship strategy is a lack of branding or marketing clutter around the courts and the tournament’s highly selective approach to the brands it works with.

Mick Desmond, head of commercial and media for the All England Club explains that the strategy is driven by the need to protect the Wimbledon identity and that the tournament has had to refuse meaningful advertising revenues from sponsors who don’t appreciate the need to safeguard the attributes of the property.

“The great thing all of our partners respect is Wimbledon is the hero brand and their association is with a great hero brand,” he says. “I think in some of the conversations we’ve had, other brands don’t get that fact and they want to be the hero brand – they want to dominate and they want to paint us different colours, and we say no because then you take away the very thing that makes us premium.”

He adds that the tournament uses a ‘cocktail of science, gut and common sense’ to assess whether a brand is an appropriate fit for the event and that it prioritises this aspect of a sponsorship over the monetary value of the deal. The partnership with luxury car brand Jaguar in 2015 was emblematic of the way the tournament places a greater importance on the brand equity of the partners it works with: Jaguar was chosen partly because of the fit with the tournament’s values of ‘premium, performance, tradition and innovation.’

The event also limits the amount of inventory it makes available. James

Ralley, head of commercial and marketing for the All England Club, says it is one of the unwritten rules of the tournament that it should have no more than 15 sponsors at any one time. It currently has 13 sponsors – and is believed to be on the verge of signing a fourteenth partner before the 2018 Championships begins – but he says the upper limit on the number of partners is a guideline rather than a target.

A consequence of this policy of scarcity and selectivity is that it helps to drive the value of the sponsorship rights that are made available.

“I think Wimbledon stands for quality – it’s a mark of quality across lots and lots of different categories and it means something to consumers – so that in itself drives value,” says Ralley. “Obviously having fewer partners helps us to do that and it’s almost as if Wimbledon is seen as endorsing our partners and I think most, or all them, hopefully buy into that.”

“Yes, we could take more sponsorship money, we could have a longer tail, but I think it’s a bit like the hare and the tortoise: the optics in the short-term may well say: ‘look I’m taking a bit more money,’ but in the long term I think you’ll take less money”

Mick Desmond | head of commercial and media for the All England Club

He acknowledges Wimbledon’s resemblance to the US Masters in the way it operates a ‘clean site’, devoid of any heavy-handed branding, and the way it subtly integrates partners into its content. Cases in point are the Rolex brand that appears alongside the on-court clock and the Ralph Lauren clothing worn by the officials.

“Any branding that you see on the court is basically product placement or product or brand integration,” he says. “Again, it goes back to integrity and

asking: ‘why is that brand on court?’ Can we look ourselves in the mirror and say, ‘that’s the reason?’

Although audience recall for these brands is reported to be high, Desmond says the tournament has to work hard to compensate for the lack of exposure and create additional value for its partners. Its decision to operate tailored packages for each sponsor rather than a tiered approach adds to the workload.

To help create value, Wimbledon is more permissive in its approach to inventory away from the show courts and television coverage. An example is the way the tournament lobbied local MP Stephen Hammond to take control of the area around the grounds and carve out additional opportunities for its sponsors in Wimbledon’s two train stations, in addition to areas of the town and nearby Southfields.

“From a physical perspective, you can’t touch Wimbledon unless you are a partner,” says Desmond. “We are protecting our partners but also giving them more collateral, so we’re happier that they are more visible in some of those areas, they are more visible in the queue and the activations we do around the queue.”

The investment the tournament has made in its social media output under Alexandra Willis, head of communications, content and digital for the All England Club is also predicated on the need to create additional sponsorship exposure and build the equity of the Wimbledon brand.

“They are the areas that we really try to dial up for partners,” says Ralley. “But again, we do it with absolute brand equity at the heart of it. Certainly, what we’re not all about in social and digital is just about facilitating partners. It’s making partners part of our content plan.”

Desmond says the fact that 80% of the tournament’s revenues are contracted gives it a ‘strong spine’ to reinvest its revenues in improving its sponsorship assets, which includes developing its digital output and corporate hospitality. On the latter point, the Championships is working with hospitality specialists Keith Prowse to replace its corporate marquees with two-tier structures and improve the overall experience for its partners.

A longer-term goal is to enter into

co-funded partnerships with sponsors to create ‘platforms’ to promote them and the Wimbledon brand around the world and leverage some of the tournament’s traditions. Ralley explains that the All England Club plans to develop a ‘Taste of Wimbledon’ food festival to create a greater a greater return on investment for brands like Lanson, Stella and Pimms.

“Food and drink and the whole experience of Wimbledon is almost as important as the tennis,” he says. “What can we do away from the site? Wimbledon is on so many people’s bucket lists – these are all hypothetical ideas but this is the way we look to approach it – can we create experiential events that bring Wimbledon to life around the world, around the country?”

The question is how far this sort of creativity can take the tournament while it continues to place restrictions on its partners. Data from SportBusiness Sponsorship shows how Wimbledon’s logo-free environment and the way it prioritises the brand equity of its partners over cash in its sponsorship negotiations keeps its central sponsorship revenues lower than its immediate competitors. The tournament ranked fourth against the other three tennis Grand Slams in 2017 with sponsorship income of €40.10m in 2017, some €36m shy of the leading Grand Slam, the US Open (£76.1m).

Desmond acknowledges that it is a deliberate policy of the tournament to keep the proportion of its revenues made up by sponsorship down – in 2016, sponsorship accounted for roughly 17.4% of revenues, roughly 10% lower than the median figure for the other Grand Slams – but he says there is method in its restraint.

“You look at a commercial model and you realise where the bulk of your income has come from and will continue to come from will be media,” he says. “Jamie Reynolds, who’s a key producer from ESPN, thinks Wimbledon is the ‘cathedral of sport’ because it’s so precious and I think Augusta [the US Masters] have that view.

“Yes, we could take more sponsorship money, we could have a longer tail, but I think it’s a bit like the hare and the tortoise: the optics in the short-term may well say: ‘look I’m taking a bit more money,’ but in the long term I think you’ll take less money.” ○



Delivering a global perspective on basketball

Ahead of his keynote address at the inaugural World Basketball Summit in Xi'an, China, on October 3 and 4, NBA deputy commissioner and chief operating officer **Mark Tatum** discusses the global impact of the league and the potential for the worldwide growth of the sport

As the world's paramount basketball league, how do you assess the impact of the NBA on the development of the sport worldwide?

First, I would say our game has never been better and our popularity and global impact continues to grow. Overall, fan engagement on a global basis is at an all-time high with our games watched by more than 1 billion viewers – one out of every seven people in the world. We have more than 1.5 billion likes and followers globally across our social media platforms – something that did not exist, not too long ago. We are the No. 1 team sport in China and have seen increased engagement from our passionate fans in other markets around the world including Africa, Europe, India, Latin America, Southeast Asia and more.

To help continue this growth, we are very focused on youth and elite development and getting basketballs in the hands of youth around the world through our programming like: the Jr. NBA; NBA Basketball Schools; Basketball Without Borders; and the seven NBA Academies we have launched for elite players, with three in China, and one each in Africa, Australia, India, and Mexico.

This year alone, our Jr. NBA program will reach more than 26 million young people in more than 70 countries. Through this, we are not only teaching fundamental basketball skills, but also the core values of the game like teamwork, respect, and sportsmanship.

As international growth is a major focus of my role at the NBA, I get



NBA deputy commissioner Mark Tatum (Mike Stobe/Getty Images)

the opportunity to travel the world throughout the year. This past year I was in Africa, China, Mexico and London for NBA games that were all sold out. Bringing the live game experience to our fans around the world, and seeing their excitement not only in the arena but throughout the city, is unbelievable to witness firsthand. It's easy to see the impact our game is having.

What does the presence of players of so many different nationalities add to the NBA brand?

We are thrilled to have a truly global league, with 25 per cent of our rosters made up of players from outside the United States. This past season, we had 108 international players from a record 42 countries and territories on opening-night rosters, many who played

significant roles for their teams.

It's a historic time as we have international legends with storied careers such as Dirk Nowitzki, Manu Ginobili, Pau Gasol, and Tony Parker, who are sharing the court with the next generation of international stars including Giannis Antetokounmpo, Kristaps Porzingis, Joel Embiid and Ben Simmons.

These incredibly talented international players in the NBA are bringing exciting elements and style to the court, and they're driving the growth of our game both with fans at home and around the world.

Where (regionally) will the growth in basketball come from and why?

While we are excited about the international growth of the sport over



the last few decades, especially in China, we know there's so much more opportunity for the game to grow in many other international markets.

We have a long history in China. Fans in China are passionate about basketball as more than 300 million people play the game there. Along with our Jr. NBA leagues and NBA Academies, we are working with the Chinese Ministry of Education, the Chinese Basketball Association and Yao Ming to grow the game at all levels. Additionally, we have great broadcast partners and are

“The values of equality, diversity and inclusion have been central to our league since its earliest days”

Mark Tatum | NBA

proud to have just completed our 31st season with CCTV and 21st season with SMG/BesTV. Tencent, the league's largest international partner, streams an entire season of live games and content to hundreds of millions of users on Tencent platforms each year. This October we will be playing our 25th and 26th NBA games in the country since 2004, with 17 NBA teams participating.

Another key region is India, which has nearly 1.3 billion people and the potential to be the next China for the NBA. The Reliance Foundation Jr. NBA program in India has reached more than 6 million young people and trained more than 5,000 physical education instructors nationwide since its launch in 2013. In May 2017, we opened The NBA Academy India, and recently had our Basketball Without Borders Asia camp there for the top high school-age boys and girls from throughout the region. This season, we brought the first-ever broadcasts of live NBA games to India during primetime, and a

weekly live primetime game on Sunday evenings in Europe and Africa. We are looking to bring an NBA game to India in the future, which we think will have an impact on the continued growth of the sport there.

Africa is another market we see as a huge growth opportunity with a population of more than 1.2 billion people. We recently announced that we will be playing our third NBA game in Africa this summer. With more than 80 current and former NBA players from Africa or with direct family ties to the continent, NBA players and coaches are always excited to support the growth of the game in the region.

How important is the Fiba Basketball World Cup to the sport around the world?

We understand the importance of an event like the Fiba Basketball World Cup in growing the sport outside of the US. For the sport to continue to grow around the world, you need more than a strong NBA. We also believe in the importance of national team competition and what it does for both individual players as well as the growth of basketball.

Specifically, what do you feel the impact of the 2019 World Cup in China will be?

We can't wait for the Fiba Basketball World Cup where China will be the epicenter of the basketball world in September 2019. We are very excited about the expanded format that will now feature 32 countries – up from 24 –

competing in eight venues throughout China. We think including more countries will help increase engagement with the game and provide more opportunities for fans to cheer on their country and watch their favorite players, many of whom will be NBA players.

Having the greatest players competing in China during the Fiba World Cup should inspire future generations of basketball players in China and around the world.

What are the key principles which drive the success of the NBA, and what advice would you give to those responsible for developing basketball leagues in other countries?

The values of equality, diversity and inclusion have been central to our league since its earliest days and have played a key role in our success.

Innovation is also something we are proud of and we have a long history of industry firsts using the latest technology to enhance the game experience for our fans. The ability for our fans around the world to watch our games and consume our content anywhere, at any time, is crucial to our continued growth.

Additionally, we work with many of the other basketball leagues around the world, including the Chinese Basketball Association, the EuroLeague, and the Liga Nacional de Basquete in Brazil, to name a few. Together, we all share a common goal of growing the game of basketball, so it's been beneficial to all of us to share our experiences and learn from one another. ○

WORLD BASKETBALL SUMMIT

The World Basketball Summit takes place in Xi'an, China on October 3 and 4. It will bring together leaders of the sport and the media, technology and commercial sectors which support it to discuss a broad range of key themes. These include global development, the role of clubs and leagues, sponsorship, next generation media, fan engagement, 3x3 basketball and basketball's role in society.

For further information go to www.worldsummit.basketball

USTA completes Armstrong rebuild on budget and on time for US Open

Five-year, \$600m project capped by opening of new Louis Armstrong Stadium

Armstrong will have retractable roof, expanded seating and state-of-the-art facilities

New night sessions will drive revenue from fans, sponsors and broadcasters



Danny Zausner, managing director of the Billie Jean King National Tennis Center, home of the US Open (US Tennis Association)

The US Open's 50th anniversary is a double celebration for the US Tennis Association, as it coincides with the completion of a five-year, \$600m redevelopment of the tournament's home, the Billie Jean King National Tennis Center in Flushing Meadows, New York.

Following the 2016 addition of both a retractable roof over Arthur Ashe Stadium and a new 8,125-seat Grandstand Stadium, a rebuilt Louis Armstrong Stadium will be unveiled at this year's tournament.

Built for the 1964 World's Fair and renovated for tennis in 1978, Armstrong was the US Open's main arena until 1997 when the 23,700-capacity Ashe was completed. Its upper tiers were removed to reduce its capacity from 18,000 to around 10,000 as it became the tournament's second stadium.

A new Armstrong – with a retractable roof – was announced in 2013 as part of USTA's extensive renovation plans for the National Tennis Center. The work – designed by architects Rossetti – has been completed on time, on budget and without public funding.

The new stadium will have more seating, taking its capacity up to 14,000; a glass-fronted retail area for Polo Ralph Lauren, Wilson, Adidas and the US Open Collection; an American Express hospitality suite; wide concourses on two levels where fans can see the action; four times as many bathrooms and concession stands than the previous arena; and a base for the umpires and ballpersons.

This year, thanks to the scheduling flexibility provided by the new roof that will allow play during rain, Armstrong will also join Ashe in having separate day and night sessions for the first time.

This will provide much more ticketing revenue – Armstrong previously had day sessions that lasted until the end of play – and hugely benefit broadcast partners and sponsors by providing additional guaranteed prime-time matches.

A service shot clock will also be introduced for the first time in a grand slam event, designed to speed up play and keep TV viewers' attention by removing unnecessary delays to the game.

Why original Louis Armstrong went off-key

Armstrong was torn down, rather than renovated once again, for two main reasons. Firstly, the stadium had caused severe foot-traffic congestion due to its proximity to the East Gate, the US Open's main entrance.

"Eighty-five per cent of our patrons come in through the East Gate," Danny Zausner, the National Tennis Center



The new Louis Armstrong Stadium under construction (US Tennis Association)

managing director and COO, tells *SportBusiness Review*. “So if you were designing a venue from scratch you wouldn’t necessarily put the main door of your stadium entrance right next to the front door of your site entrance.

“[But] it was the nature of the park and what was available land for the USTA when they came in the 1970s and again when they renovated in the 1990s.”

Secondly, the USTA felt it had no option due to the limitations of the 1960s-era structures, which were originally designed to be temporary.

“We recognised many years ago that it was outliving its useful life and while it was an unbelievable place to watch tennis, it needed modern amenities. There was just no way to do anything with the existing stadium any longer,” says Zausner.

“Everyone was so focused on the action on the courts that they really just accepted the fact that the bathrooms were from 1964. We were very limited with concessions offerings, merchandise offerings, shade, open hallways – but we did what we could as the fans loved the venue and the players loved playing there.”

Raising the roof

The US Open will become the second grand slam with multiple retractable

roofs, joining the Australian Open (which has three) and beating Wimbledon’s redevelopment plans for No1 Court by a year. The French Open is expected to have a roof on Court Philippe Chatrier, its first, by 2021.

The USTA had considered installing a roof on Ashe when it was first designed in 1994, but 100 years of rain data indicated that it made no financial sense due to the historically dry climate of New York in late summer.

“There is no business model that it will show you that [the roof on Arthur Ashe Stadium] makes sense but it was the right thing to do for the event.”

Danny Zausner | managing director, Billie Jean King National Tennis Center

It took five years of unlikely rain delays between 2008 and 2012 – pushing the men’s final to Monday each time, at the inconvenience of fans, players, sponsors and broadcasters – to change the USTA’s thinking. A retractable roof on Ashe, costing \$150m, was

completed in 2016 and will be followed by Armstrong’s.

Rain delays throughout the tournament remain rare but the USTA was happy to trade primary returns against secondary and tertiary benefits.

“There is no business model that will show you that [the roof on Ashe] makes sense but it was the right thing to do for the event,” says Zausner. “When we had the technology available to do it, it was the right thing to do.

“When you get almost 20 per cent of your fanbase coming from international places, and 40 per cent coming from outside the Tri-State area, these people could be coming for just one day so for these people to travel, show up and then get rained out, it puts a bad taste in their mouth and nothing positive comes out of that.

“This type of certainty in terms of play does not generate revenue but it does ensure a better experience. From a word-of-mouth and buzz perspective, if more and more people come and have a great experience it will lead to more fans coming round each year.”

Zausner says the guaranteed play provided by the roofs could help in regards to negotiating future broadcast rights. But he does not believe it will be a deciding factor. “I don’t think our broadcast partners were saying before

that they had something that was less than ideal,” he says.

The ability for US broadcast partner ESPN to have guaranteed prime-time programming on both Ashe and Armstrong “will be a real upgrade”, Zausner adds.

Both roofs take six to seven minutes to close. For Zausner speed was of the essence – almost regardless of cost – so players would not have to leave the courts during the rain delay and fans watching on TV would not lose interest while they wait for play to resume.

“When we first designed the Arthur Ashe roof, it was projected to be 30 minutes to open or close it. My perspective was, ‘I don’t want to lose the players back to their locker rooms’. So the engineers continued to work on it and they were able to get it down to six or seven minutes.

“It cost more money but for us the difference between sitting in the rain for 20-plus minutes for a roof to close versus it closing in six minutes and being back in play within 10 minutes was a huge difference and that justified the cost. As long as the [cost of installing the roof] didn’t scare us that was the goal.”

How Armstrong will be monetized

After the original Armstrong’s capacity was reduced to 10,000 following the construction of Ashe, the USTA decided to increase it to 14,000 in the new stadium. “A number in the middle that will help with crowding on the site,” says Zausner.

A total of 7,400 seats in the upper bowl are general admission – meaning fans can get a seat, day or night, with a grounds pass – while 6,600 seats in the lower bowl are for reserve-ticket holders only.

The increase in general-admission tickets from 7,000 to 7,400 is designed to reduce the queues outside the venue. “We are hoping to alleviate those fans that are patiently waiting outside the stadium for a change-over or an opportunity for people to leave and seats to free up,” says Zausner.

The increase in reserve tickets from 3,000 to 6,600 – combined with the newly-separated day and night sessions – is designed to increase revenue as it



Artist's impression of the completed Louis Armstrong Stadium (US Tennis Association)

gives many more opportunities for fans to see matches.

There will be daytime sessions on Armstrong for the first nine days of the tournament fortnight, each containing three matches, joined by two-match night sessions for the first six days.

“Those 3,000 reserve tickets in the old stadium, you would get a subscription and for the first nine days that would get you all the matches that were played there all day. There were usually four or five matches a day and they would run until 9-10pm at night,” Zausner adds. “Now there will be two separate events.”

Last year, the average cost of an all-day ticket was \$238; this year a day-session pass costs on average \$258 and a night session \$264. Having doubled the amount of reserve seating, the USTA could more than quadruple its reserve-ticket revenue on Armstrong over the first six days.

The USTA decided against adding premium seating to the new Armstrong. “We believe that the space is better used by seat holders than suite holders in the building,” says Zausner. Space, however, has been provided for USTA partner American Express to build a private hospitality space for Centurion Card holders in the second floor of the building.

On time and on budget

The USTA has completed the five-year, \$600m project on time and on budget, with no design compromises made along the way. “The initial budget was \$600m and that’s pretty much what we’re spending,” says Zausner.

To pay for the renovations, in 2014 the USTA completed a \$450m bond sale aided by its bankers JPMorgan Chase and Bank of America Merrill Lynch. The bond is cut into three tranches: three years, 10 years and 25 years. Cumulative annual interest costs will reach \$30m. The remainder of the renovation is being paid out of reserves and free cash flow.

“I assume within the next 10-15 years you will see the majority of [the bonds] paid off,” says Zausner.

It is serendipity that the completion of the five-year project, which happened to begin in 2013, aligns with the tournament’s 50th anniversary celebrations. “If someone said to me we’ll give you seven years to do it rather than five, it would have been a saner approach but we’re getting it done and it’s in the best interest of the event to do it quicker rather than longer,” Zausner says. “It’s perfect that it ends with the 50th anniversary. It’s taken years off my life, but it’s been fun.” ○

Delivering sales above forecast

Legends International's Florent Coulon and Samin Macdonald deliver five insights to the ticket and hospitality sales sector



Successful Projects

Some of the sales projects Legends International's team members have delivered in Europe include:

- Wembley Stadium's Club Wembley programme
- Uefa (Euro 2008, 2012, 2016; Champions League final 2011 & 2013)
- London 2012 Olympics' Corporate Hospitality Programme
- Friends Arena in Stockholm
- Türk Telekom Arena in Istanbul
- Groupama Stadium in Lyon

In the fast-evolving and increasingly competitive sports and entertainment industry, maximising revenue from ticketing and hospitality is not simply a matter of delivering a great product on the pitch or the stage. Another essential ingredient for success is creating new opportunities to enjoy the live experience and ensuring these offers are a big hit on the day of the match or event. As Richard Cheesman and Martin Jennings of Legends International explained in our first exclusive white paper, that involves a thorough and detailed analytical and developmental process as well as cutting-edge creativity, in order to establish the right mix of products for the anticipated content in that location in that specific market. Once the ideal mix of experiences has been identified and created, the next critical step is to deliver sales at or above the forecast levels to ensure that the business plan is achieved and ROI is maximised from both a brand and a financial perspective.

The foundation of Legends' success when helping clients to achieve their sales targets in respect of ticketing and premium experiences has been the consistent application of the core elements of: Process, People, Execution and Culture. Delivering on each of these elements requires great commitment, time and attention across the entire client organisation.

Florent Coulon, vice president, international sales, and Samin Macdonald, associate project director of Legends International provide key insights into how the sector is evolving.

Samin is responsible for the set up of Legends International's ticketing and hospitality sales projects. This includes developing sales, legal and financial processes along with the implementation of project-based IT and CRM systems. Florent leads the Legends International Sales vertical and has responsibility for delivering revenue forecasts from ticketing and hospitality at all client venues. His personal involvement and commitment to projects is continuous from the recruitment of the first

member of the local sales team through to the end of Legends' involvement in the sales process, typically years after stadium or venue opening. Florent joined Legends International in January 2018 after spending four years as director of hospitality for Olympique Lyonnais, where he successfully planned and executed the Premium Sales programme for Lyon's Groupama Stadium, which opened in January 2016. Earlier in their careers, Florent and Samin were colleagues at IMG and worked together on the enormously successful sales execution teams for Wembley stadium and Euro 2008.

Insight 1 – Sales is not a dirty word

In the UK and across Europe, the words 'sales' and 'salesman' have had a negative connotation, with words like 'pushy', 'arrogant' or even 'unreliable' or 'untrustworthy' often attached to them. At Legends, they are dedicated to changing that perception. Legends believes that sales professionals are there to sell with integrity by understanding the client's values, market and target audience; by learning about a



potential customer's goals, culture and ambitions; and using that knowledge to build a relationship. Through that relationship the sales team is able to tailor an offer or set of experiences to suit a customer's needs, to help solve problems, and ultimately to deliver the right game plan to drive the organization forward. A key Legends mantra is: "sales is a relationship not a transaction".

Most people recognise that companies cannot succeed without sales professionals bringing business through their doors. That in itself is not sufficient. Based on years of experience and expertise, the Legends global sales team has learned that every country is unique and the sales process varies from one country to another, and indeed from one team or property to another.

In Spain, where Legends is responsible for all premium seat sales for Atlético Madrid's Wanda Metropolitan, you won't find the buzzy 'boiler room' atmosphere created around telephone sales in the UK and elsewhere. That's not because the sales executives aren't as focused on success, it's because sales are executed in a different manner. Spain is a country where initial cold contact is far more widely accepted and more effective, such as using social channels such as LinkedIn.

Because Legends works internationally, the importance of local and national cultural differences is recognised, and their team works diligently to train and invest in people with the skills, competencies and attitude to succeed. Florent explains: "We expect our sales teams to work hard. That is a given, but it is not enough. They must also work 'smart'. We encourage them to be strategic in how they approach the market, to be diligent in their research before approaching prospects, and to have a clear and flexible plan, tailored specifically, for how they will engage with all sectors and demographics of the local market".

Insight 2 – People are your most valuable resource

Making a commitment to invest in the growth of your team is in fact what

allows Legends to continue to focus on the right priorities and provides them with the expertise to move from project to project and consistently deliver at the highest level.

Both Samin and Florent started their careers in the sales team that successfully delivered the UK's first long-term premium seating programme for Wembley Stadium. "Ten years later, high performers from this team have all become industry leaders, and it's a great group to be part of for networking, sharing best practices and staying on top of industry trends. "At Legends, we believe networking and building effective relationships are key to build a competitive roster of talent: some of our colleagues in the US have been working together for more than 15 years on two, three or sometimes five different projects. It's undeniable that there are huge benefits as well as efficiencies in working with people you know, you trust and you can rely on".

Having a network of experienced sales executives that the Legends Team has worked with on multiple projects enables them to build each sales resource around experienced professionals – people who have faced the tough challenges and know how to deal with them. We supplement that experience with carefully-selected local talent to achieve the optimal blend of youth, energy and experience like any good team.

Legends build their team to ensure that they have the proper infrastructure to deliver on each of the areas of their partnership. They place huge emphasis on and significant time into identifying and hiring the best local talent in the industry. From there, the team continually mentors, coaches and equips their team members to understand market trends, embrace new sales techniques and stay ahead of the game.

Insight 3 – The client is the story

Delivering a successful sales strategy does not come to life without having a team of talented and committed individuals on the ground who can



deliver. Building a talented team is critical, but it is not enough. One of the most crucial elements of Legends' strategy is developing a complete understanding of the client, its values and its brand. This is essential in shaping the way in which the sales team presents opportunities to potential customers. Of equal importance is to understand and buy into the ethos in which their clients operate so that the sales team is able to integrate themselves and their process within the client's culture.

To gain this understanding takes time and effort in building relationships across the entire company.

Fundamental to the Legends approach is the understanding that 'the client is the story'. Whether engaging with long-term season ticket holders, families, or large corporations, Legends sales teams are required to have an in-depth understanding and passion for the team or venue which they represent. As Samin says: "We always remember that a customer is also, and primarily, a fan – they want to engage with their team and not with a third-party sales agent throughout the process". Legends sales teams are required to blend seamlessly into a client organisation. The physical manifestation of this is that Legends operates on a 'white label' basis and the sales team members carry business cards which identify them as members of the client's commercial team. The most important emotional manifestation is in the way in which the team members present themselves – as passionate advocates and representatives of the client organisation.



Insight 4 – Invest in sales and marketing

Five years ago, Samin remembers seeing Legends present while he was visiting a business summit in Manchester. It was years before the acquisition of ISG was even contemplated and Legends was expanding to the EMEA market. They played a video showcasing their newly-opened \$10m Levi's Stadium sales centre in the San Francisco Bay Area, and Samin sat there shocked by the amount of money invested in sales and marketing in the US. It was simply unfathomable on this side of the pond.

Over the years, Legends International has worked hard to change their clients' mindset. As Florent explains: "All clubs and venues have multiple competing requirements for available spend. Investment in sales and marketing is essential to generate the long-term returns on investment. We spend a lot of time with clients helping them away from the mindset of it being an unnecessary expense and to convince them that appropriate investment in education, sales and marketing is a key component for delivering outstanding results. Indeed it is so fundamental to success that Legends will invest alongside the client to create the optimal sales and marketing capability".

Legends have seen this investment pay off massively from their projects in the US and have brought their relevant experience to create a success story in the European market.

Samín can remember setting up Atlético Madrid's project: "The Club

was at first reluctant to commit to spending money on a mock-up box within our sales office and it took us some time to convince them of the return. The plan was to build a box, including a row of the exact seats that would be used in the stadium, with a video wall to be able to show the view from any seat in the stadium using a 3D stadium visualisation tool. Once this was finished, the Club was so impressed that they used the space for their own meetings and would regularly bring partners to see it during discussions on the new stadium. The suite became a key marketing tool for the club as a whole, as well as for the new stadium."

Legends' approach to the marketing of tickets and hospitality is to develop a bespoke marketing strategy covering the essential ingredients of education and awareness, and a targeted approach to all relevant sectors and demographic segments of the potential market. Informed by the research and business planning process, this marketing strategy will become part of the club or venue's communication strategy.

Legends believes that at the heart of every sales and marketing strategy is the ability to acquire and effectively analyse and use data. Clients often have invaluable data which is vital to the process of segmentation, defining catchment and identifying historical renewals – all of which contribute to identifying new products and developing appropriate sales and marketing strategies.

This sophisticated data-driven approach is complimented by targeted and impactful digital sales collateral. "This is a must-have and should be a part of the fully thought-through process across the whole marketing mix", adds Florent. "We apply all of our expertise and use our research capabilities to define the most effective way to inspire and influence our potential clients in each territory. You can't assume that you will engage with a prospective corporate client in France

or Spain in the same way that you would do it in the UK."

Another tool Legends uses as part of the sales process is a Sales/Customer Relationship Management System which provides a pipeline, contract and payment management system, along with traditional CRM functionality, such as helping to know the customers and better understanding their needs. In doing so, you are able to provide outstanding service, simplify the administrative process and effectively renew business, while also introducing new, upgraded offers and accurately managing performance and activity levels from your sales team. The key is to create a sales system that supports our specific sales approach and pipeline management, and not let our processes be determined by the limitations of out-of-the-box solutions.

Legends has developed and built these systems from scratch, as was the case at Friends Arena in Sweden where Microsoft Dynamics was chosen to easily integrate into the client accounting system. However, on most occasions where a client has an existing system, it makes more sense to customise this to match our requirements, such as Atlético Madrid's Salesforce CRM.

Insight 5 – Use international experience to deliver best possible solution

Part of the Legends International learning process has been built on first-hand access to the experience and industry-leading trends from their US counterparts. Working for a global company builds a collaborative environment in sharing data and progress and making decisions to determine the best path to move forward.

Legends International do not replicate the model. Instead they take the best practices and trends from their projects in the US and combine that with their international experience and knowledge to come up with the best sales operations and delivering outstanding results. ○

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Bringing data to the Tour de France

Dimension Data's partnership with the Tour de France began in 2015 and looks set to continue due to its demonstrable success. **Kevin McCullagh** talks to the chief marketing officer about their achievements



Ruth Rowan, Dimension Data

A good sponsorship creates value for both parties. In the case of Dimension Data and the Tour de France – winners of the Event or Competition Sponsorship of the Year at the 2018 Sports Industry Awards – cycling's most famous grand tour got comprehensive performance data for media and fan consumption for the first time. And a fairly unknown IT company was given a global profile.

SportBusiness International spoke to Dimension Data chief marketing

officer Ruth Rowan about the genesis and evolution of the partnership, which started in 2015 and will run to cover the 2019 Tour.

Coming together

Dimension Data is a systems integrator and managed services provider that brings together hardware and software from other providers to help organisations build the IT systems they need.

Founded in South Africa in 1983, it is owned by Japanese telco NTT Group, which acquired it for \$3.2bn in 2010.

It employs over 28,000 people in 47 countries and turns over about \$8bn per year.

In 2015, Dimension Data management decided the firm needed to invest in brand marketing. Over three decades, the company had grown into a large multinational, but its brand was still relatively unknown.

"We're a very successful company, a very big company, an \$8bn company, but most people haven't heard of us," says Rowan. "Even among our clients, who are some of the world's largest organisations, we just didn't have a very big, strong brand."

"The technology industry, and certainly the systems integration consulting business, was getting very crowded. Whereas before we had quite a nice niche that we were very successful in, there were big brands coming in and competing as the technology industry started to converge."

But the firm couldn't compete with their bigger competitors on the more traditional marketing routes for IT brands. "We were looking at areas like... digital advertising, SEO - the more traditional ways of building brand," Rowan says. "But we were never going to be able to outspend the giants in our industry like Microsoft, IBM, Cisco, to get that same share of voice."

Considering sports sponsorship

At the same time as Dimension Data was looking at its options for brand marketing, Amaury Sport Organisation – the operator and commercial rights-holder of the Tour de France – was seeking a technology partner. The Tour de France, and cycling in general, was lagging behind other major sports and properties in terms of incorporating data into media coverage.

An ASO executive, researching global IT brands, spotted a French name among Dimension Data’s executive team. Figuring the common language could help start the conversation, he sent an email and the ball started rolling on what would eventually become the Official Technology Partnership.

Personal interests in sport and cycling within the Dimension Data executive team helped to propel the discussion forward.

“It’s incredibly helpful that our chairman, chief executive and several members of our executive team are cycling enthusiasts,” Rowan says. “I think that’s important, because if you don’t have that personal interest and passion, it’s actually very difficult to get leadership from the top when you are pushing these major sponsorships...That wasn’t the main decision-making criteria, but it made things a lot easier for us.”

The Tour ticked several boxes:

Target demographic

“Cycling is a very fast-growing sport in middle- to high-earning professionals, 35 to 55 [years old]. There’s quite a lot of research in the market about that. You know, we’re not talking about surfing... that’s not really the target demographic. But cycling was very much in that sweet spot.”

Global reach

“Cycling, and particularly the Tour de France, just had the reach,” Rowan says. “It’s got an audience in 190 countries. Even non-cycling enthusiasts watch the Tour de France.”

Cost

“Cycling was also relatively inexpensive to enter. If we compare it to Premier League soccer, American sport, the Olympics, you’re adding another digit onto the impact.”

Opportunity

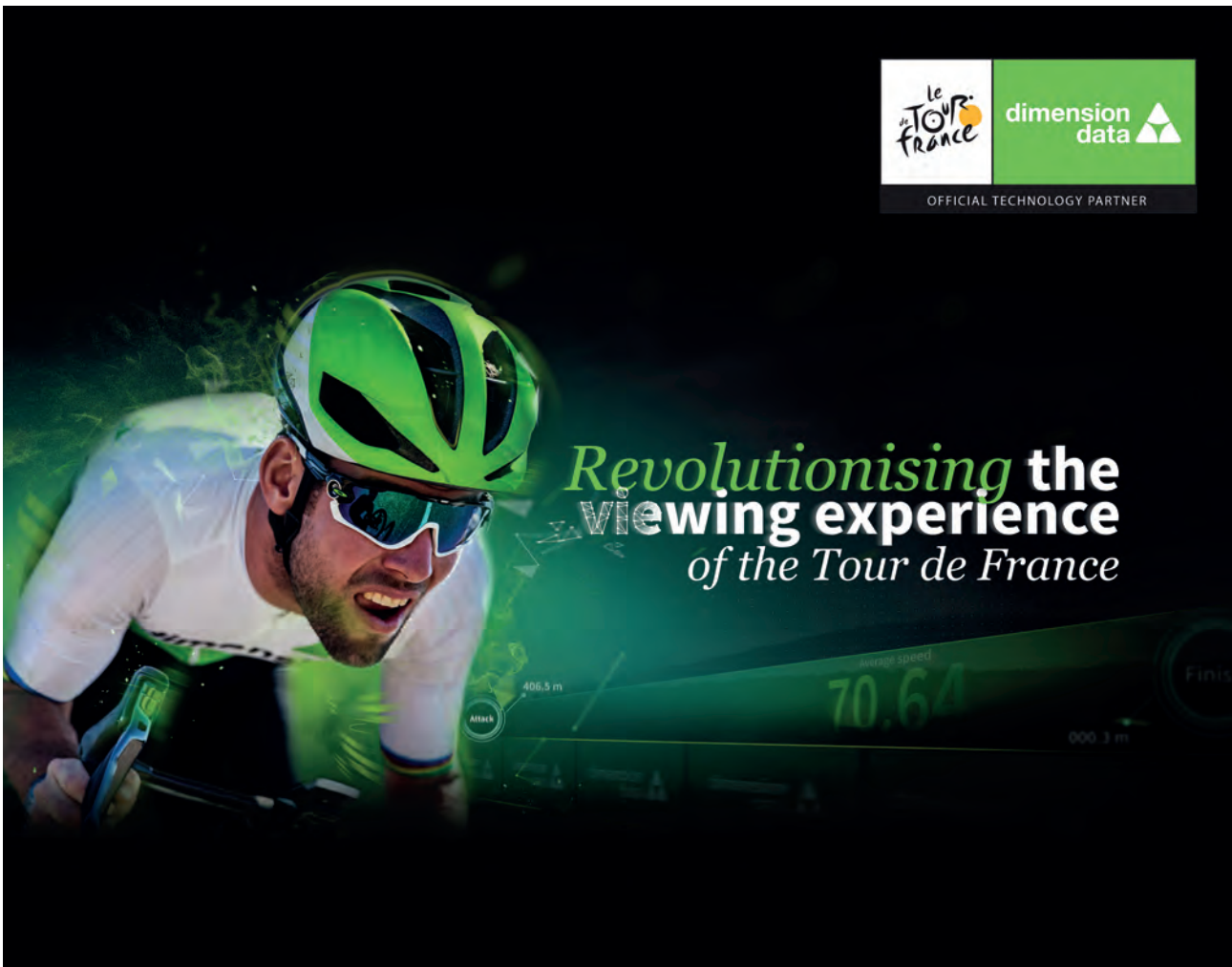
“Cycling at that time, back in 2015, really hadn’t digitised. There was no way

of actually seeing or understanding what was going on at the race apart from seeing the TV coverage or listening on the radio...We could also see there was an opportunity for us to revolutionise how the race was viewed, through the use of technology. Not only could we build our brand from an awareness perspective, but we could also show how technology could change a sport. So that was critical for us.”

Creating the technical solution

In the first year of the partnership, Dimension Data focused on a technical solution to delivering Tour cyclists’ performance data.

First, there were extensive negotiations between Dimension Data, ASO, teams, riders, and unions around issues including permission to put a tracker on the bicycles, agreeing what data would be gathered, and deciding





who owned the data. Then, Dimension Data had to create a tracker that fitted unobtrusively on the bicycles.

The biggest technical challenge was ensuring a reliable live stream of data from the bicycle-mounted trackers, which must transmit data via a reliable network back to the Big Data Truck parked at each stage. Because the bicycles move quickly over long distances – with some stages over 200km long – and through remote areas of countryside, using mobile phone networks was out of the question.

Dimension Data’s solution was to piggyback on the network, used by television broadcasters, of transmitters and receivers in cars, motorcycles, helicopters and aeroplanes following the race.

Data on speed, location, separation, gradient and more flows via these

vehicles to the Big Data Truck. The truck team is then able to deliver the data securely to TV broadcasters and other media, and via the official Tour app and website. Dimension Data teams working at a ‘Data House’ in London, and other locations around the world, analyse the data and produce infographics and other content for media and social media feeds.

Activation

Dimension Data has a visual presence – usually the company logo – wherever its data appears on official media coverage, including television, the official app, and official social media feeds. The company also manages official Tour de France social media accounts with the handle @LeTourData on ASO’s behalf.

In 2016, the company ramped up content production around the data.

“The second year we were able to start putting some stories around the data, to actually enhance that for the journalists and the commentators.”

Ruth Rowen | chief marketing officer

“The first year really was about ‘Can we put a tracker on the bike?’, ‘Can we capture that data?’, and ‘Can we report on it real time?’” Rowan says. “The second year we were able to start putting some stories around the data, to actually enhance that for the journalists and the commentators.”

There have been some breakthrough pieces of social media content, including

a heat map that showed rider Mark Cavendish waiting until the very last second before committing to a winning sprint finish, and a speed chart during a major crash that showed bicycles either coming to an abrupt halt or accelerating rapidly as they catapulted through the air.

Bringing clients to the Tour is a major plank of the deal. Rowan says: “It’s one of the core pillars for us: the opportunity to take clients into France... for them to be able to see behind the scenes, to see how technology is transforming the Tour.”

Engaging current – and future – employees is another. In the first year of the deal, employees were enthused to see their brand, which was previously very low-profile, suddenly on television and media around the world. “I saw all these DD people taking selfies in front of their TVs, saying ‘Oh my god, we’re on the TV!’,” Rowan says. “It was extraordinary.”

Results

According to SportBusiness Sponsorship, Dimension Data pays about €2m per year for its sponsorship rights and invests more again in activation. What return has it seen?

The firm assesses the value of earned media – advertising that hasn’t been directly paid for, including the total value of all brand exposure on television and other media, press mentions and the impact on their brand and brand perception – around the deal at about \$70m per year.

To judge brand impact, Dimension Data surveys about 500 individuals from potential and existing clients, in 15 countries from North and South America, Asia and Europe. Survey data showed that between 2015 and 2017, prompted awareness of the brand increased from 27 per cent to 40 per cent of respondents, and consideration – a measure of how many are considering purchasing from Dimension Data – rose from 54 per cent to 73 per cent.

The sponsorship has also helped the company shape perceptions of what they do. Rowan says: “Do people think that we’re a distribution company of other people’s technology, or do they actually see that we do digital transformation, cloud integration – all the things that

we want to be known for? We’ve seen a massive shift in that, that we can account back to this sponsorship.”

“Do people think that we’re a distribution company of other people’s technology, or do they actually see that we do digital transformation, cloud integration – all the things that we want to be known for? We’ve seen a massive shift in that, that we can account back to this sponsorship.”

Ruth Rowen | Chief Marketing Officer

For every dollar spent on the deal, Dimension Data calculates that it earns about \$20 of net new revenue. This includes business generated at client visits to the Tour de France and other Tour de France-related client engagement programmes. The sales team uses the Salesforce CRM system to record when the sponsorship was the source of business.



“There’s a great example from one of our airline clients,” Rowan says. During a visit to the Tour de France, the client realised for the first time that Dimension Data could help it revamp its digital applications and capabilities. “And as a result of that we were able to open up a whole new project that we were able to bid for, and we won.”

The company is now also beginning to track how the sponsorship is driving business via their website, which sees a 3,000-per-cent increase in traffic during the Tour in July. That spike delivered an important lesson in the first year of the deal – prepare for unintended consequences.

“That first year, our website just fell over,” Rowan says. “We just didn’t anticipate the traffic! So one of the unintended consequences was that over the following year we had to totally rebuild our website.”

Dimension Data and the Tour are currently in talks over a renewal, Rowan says.

The tech industry is ever-changing, and the brand sees the sponsorship as a flexible and productive way to continue showcasing its capabilities. Even now, the two parties review every year the definition of ‘technology’ in the partnership. ○

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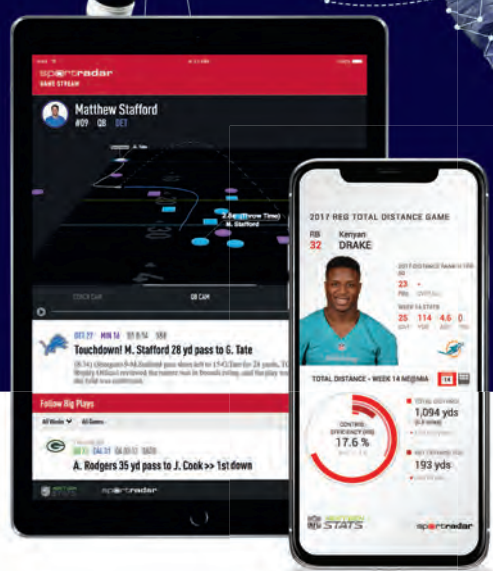
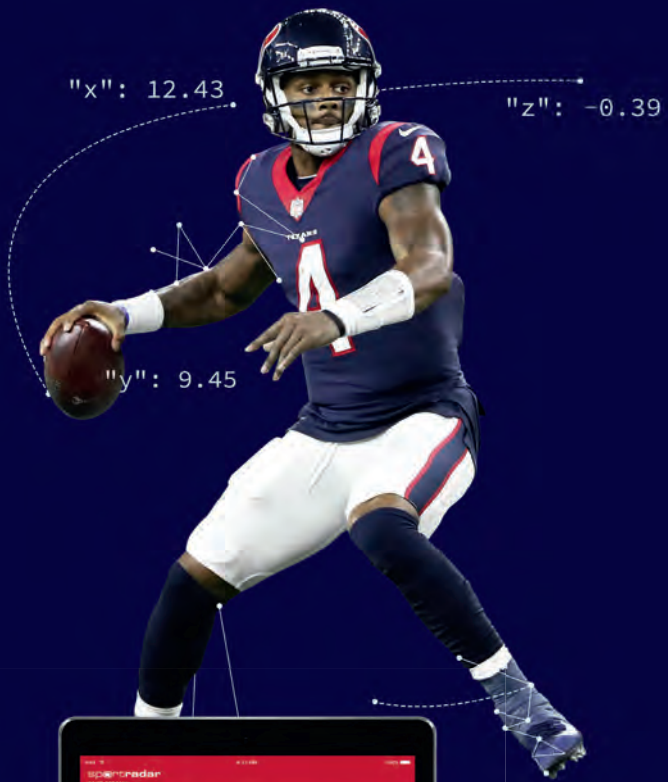
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FC Cincinnati president on the club's preparations for Major League Soccer

Club have hired consultancy firm Premier Partnerships to secure commercial deals

Interbrand, which redesigned Juventus' logo, brought in to undertake brand refresh

New \$250m soccer-specific stadium will be multi-purpose and have naming rights



(Joe Robbins/Getty Images)

Bob Williams

It's like trying to drink out of a fire hose," says Jeff Berding, FC Cincinnati president and general manager, of his quest to transform the club into a Major League Soccer franchise for the 2019 season.

The lead time is unusually short. FC Cincinnati – currently playing in the United Soccer League – was announced as an expansion franchise in May. Nashville, who were awarded a place in December, will not join the league until the 2020 season at the earliest.

While MLS commissioner Don Garber says the club is "MLS ready", this disguises the enormous job Berding has to guide the club to its inaugural

MLS campaign, which effectively begins with the expansion draft in December. At the same time the team is completing its final USL season, which could stretch until November if the team make a deep play-off run.

Immediately, this means: hiring new front-office and sports staff; scouting for new players and potentially overhauling the squad; making further upgrades to temporary venue Nippert Stadium; a brand refresh; renegotiating all commercial deals; and seeking potential new broadcast deals.

In the medium term, it means building a new \$250m soccer-specific stadium in Cincinnati's West End area – due to be completed in 2021 – as well as a state-of-the-art training facility.

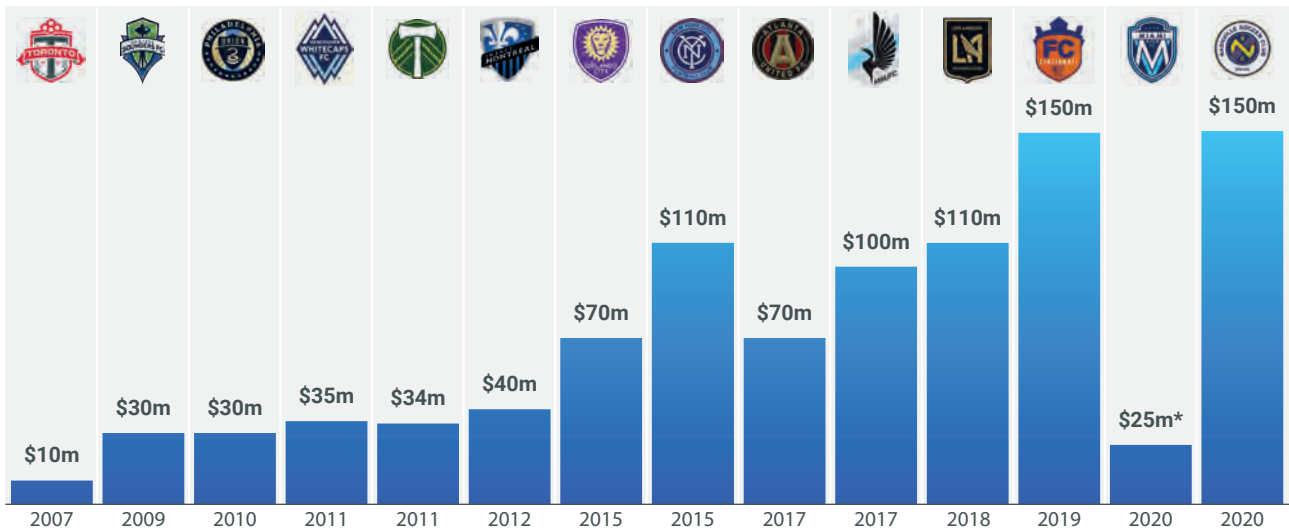
"What we were doing previously is nothing compared to what we are going through right now," Berding tells *SportBusiness International*. "As you go from the second division [USL was upgraded in January 2017] to the first there are things we need to be better at and there are things that we've identified with MLS that are a step up. We are working very hard to do that."

"We can't lose a single day," Berding said recently. "There are no victory laps."

Brand refresh

As part of MLS's single-entity model, team names, colours and logos need league approval. Virtually every existing club that has joined MLS has had brand redesigns to varying degrees.

THE COST OF JOINING MLS HAS GROWN STEADILY OVER TIME



Source: sportbusiness.com

FC Cincinnati has hired global brand agency Interbrand, which has an office in the city, to help tweak its brand ahead of the MLS season. Interbrand is best-known for the redesigned logo of Italian soccer giants Juventus.

“It will be an evolutionary change from USL to MLS,” Berding says. “If you look at what Juventus was prior and post, they are still black and white and still Juventus but the brand has a different, cleaner look. We are going through the same process as the same agency that [worked with] Juventus.

“The colours, blue and orange, will stay the same, we will still be FC Cincinnati. We are not talking about a revolutionary change – the brand is working, it has a lot of value in this market and we have spent two and a half years building it up to give it cultural ubiquity in the market.”

Another change will be the business name – from Futbol Club Cincinnati to Fußball Club Cincinnati, although the club will generally still be referred to as FC Cincinnati. This is mainly for legal reasons: the club are required to create a new company to join MLS and the name cannot be exactly the same.

“It is an acknowledgement of Cincinnati’s strong German heritage,” says Berding. “We do have fans in Germany – Munich is a sister city of Cincinnati and we have developed some

relationships through our sister city and we will look for opportunities to continue to grow it.”

A new home

FC Cincinnati has rented the 40,000-seat Nippert Stadium, home of University of Cincinnati football, since 2016. Its three-year lease runs from 2016 to 2018. “The rental deal does change in MLS, we’re negotiating that right now,” Berding said.

MLS will require upgrades, including a new visitors’ changing room, which will be built under the North End stand. There will also be broadcast technology and fan-experience improvements.

FC Cincinnati has options to extend the Nippert lease by four additional three-year terms, but if all goes to plan only the first extension will be required. Though the club initially hoped to remain in situ, MLS insisted on a club-owned downtown stadium – a standard requirement for expansion teams.

After a lengthy process, a deal was secured in April to build a soccer-specific stadium in the city’s West End neighbourhood. The stadium is due to be completed in 2021.

Reports that FC Cincinnati’s new stadium will have a 21,000 capacity are wrong, Berding says. “We haven’t finalized what the number of seats is – I expect we’ll be far above 21,000.”

He has already visited several MLS stadiums to investigate best practice and will have visited the remainder in the coming weeks. “We’ll borrow some of the best ideas we see from some of the different venues but also look to make it distinctly Cincinnati,” he says.

“We have one of the larger kit sponsors in MLS and we think it validated that while we’re a smaller media market we have a very strong business market and that was central to our bid.”

Jeff Berding | FC Cincinnati president and general manager

Berding is yet to hire architects, engineers or a construction firm. Plans to maximise revenue from the new stadium – while embryonic – include a significant amount of premium seating, securing naming rights (with the help of consultancy firm Premier Partnerships) and making the venue multi-purpose. “... concerts versus college soccer games, high school soccer games, movie nights... all of that is something that we are studying,” says Berding.

The \$250m stadium will be paid for

by owner equity and bank financing, says Berding, while the local council has agreed to provide \$34.8m in infrastructure costs for the new stadium.

Tickets will rise

The club will increase ticket prices next season, to levels comparable with average MLS pricing around the country.

In the USL, season tickets in the FC Cincinnati supporters' group section, The Bailey, are sold for \$170. MLS season tickets in supporters' sections usually range from \$272-\$468.

Berding says: "As we move from division two to division one and Cincinnati is hosting some of the best players in the world, there certainly is an expectation that ticket prices

will increase. There is a desire and acknowledgement on our part that the entry price point needs to remain accessible – and it will.

"We're very mindful that a key value of FC Cincinnati is that it is a family-friendly club and we'll never lose sight of that. Part of a way to show that is to have price points that families of all means can afford."

He added that there will be a further price rise for tickets when the new stadium opens.

Sponsorship and broadcast rights up for renewal

Almost all the club's sponsorship deals (see below) are up for renegotiation ahead of the move to MLS. Berding

says existing partners have shown "enormous interest" in renewing.

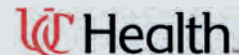
"All our commercial deals have language in them regarding the MLS move-up. We were very cognizant that MLS was our ambition, and we needed to protect our business interests to that end," Berding says. "All the deals involve renegotiations. In most cases you are adding a zero [to the deals]."

As part of the move from the USL to MLS, FC Cincinnati will switch from Nike to Adidas uniforms and merchandise. The deal is expected to kick in once the USL season ends but the club will continue to sell its Nike stock for the remainder of the current campaign.

Its local broadcast rights are currently held by Sinclair Broadcast

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Group's Star 64 and CW television channels. Berding says these deals – rolling annual agreements with Sinclair – will be discussed in an onboarding session with MLS in the coming months and it is “to be determined” if the club moves to different networks. “We’ve just started these conversations,” he says. “We value being over the air with television – we will look to continue that – and we will look to give everything [for example, digital rights] ample consideration.”

MLS format creates new business model

In MLS, the club will see its business model transformed.

In the USL, owners control their franchise independently, and retain all revenue earned locally (from sponsorship, ticket sales, merchandise, broadcast, parking, concessions et cetera). They pay an annual participation fee toward the league's operating costs.

“We’re very mindful that a key value of FC Cincinnati is that it is a family-friendly club and we’ll never lose sight of that”

Jeff Berding | FC Cincinnati president and general manager

Under MLS's single-entity model, outright owners become investor-operators who have a stake in the league. Revenues from sponsorship, merchandise, local broadcast, parking, and concessions are still retained, but revenues from online merchandise and 30 per cent of ticket sales are shared with the league.

Factoring in a planned new training facility, it will cost between \$400m and \$500m for FC Cincinnati to join MLS, with the largest individual costs being the stadium and the \$150m expansion fee required to enter the league.

The value of the club is certain to rise enormously. Earlier this year, the sale of a minority stake in Orlando City – which paid \$70m to join MLS in 2013 – valued the club at \$500m. ○

HOW FC CINCINNATI FOCUSED ON SPONSORSHIP TO OVERCOME TV MARKET HANDICAP

MLS was on the mind of Carl Lindner III well before he established FC Cincinnati. The businessman – born in the city – had exploratory conversations with Garber in 2014 about the viability of an MLS team.

He first created a team in the USL to test out the local market to establish what interest there was in professional soccer. FC Cincinnati was established in then-third-tier USL in 2015.

It made a big impact in the USL by drawing average crowds of 17,296 in 2016 and 21,199 the following year, both league records. Playing in the heart of the University of Cincinnati campus, the club targeted the large student population with marketing and cheap tickets – as low as \$5.

In late 2016, the club spent \$2m to renovate Nippert, expanding the pitch from 110x70 yards to 115x75 yards to make it Fifa-regulation size and suitable for MLS play.

They applied for an MLS expansion berth in January 2017, and was shortlisted – alongside Detroit, Sacramento and Nashville – in November.

Its biggest challenge was the Cincinnati television market, which is the US's 35th-largest – considerably smaller than those of rivals Sacramento (20th) and Detroit (14th).

MLS considers clubs in large media markets essential – they allow its marketing arm, Soccer United Marketing, to negotiate bigger broadcast and sponsorship deals.

That's why in June 2017, FC Cincinnati brought in consultancy firm Premier Partnerships – run by former United States Soccer Federation president Alan Rothenburg – to help secure commercial deals that would prove the strength of the local business community.

Premier Partnerships had helped Atlanta United secure a shirt sponsorship deal for their inaugural MLS season in 2017 with American Family Insurance, worth a reported \$3-4m annually.

And it helped FC Cincinnati, with a \$5m-per-year shirt sponsorship with Ohio healthcare provider Mercy Health. The average MLS shirt-sponsorship



FC Cincinnati president and general manager Jeff Berding (Joe Robbins/Getty Images)

deal is \$3.6m a year.

Berding believes the deal, which runs for five years with an option to extend, was contingent on FC Cincinnati being selected to join MLS, and played a major role in the team being awarded an expansion slot.

“We felt strongly that if we had a major league-sized kit sponsorship, it would help validate our belief that Cincinnati has a business community that punches above its weight class,” Berding said.

“With Premier Partnerships we went to market locally with the top companies who might have an interest. We pitched a number of companies and landed Mercy Health who had enormous interest and we thought were a good fit.”

Mercy Health chief marketing officer Sandra Mackey played a key role by urging chief executive John Starcher to attend a game in August 2017. Starcher revealed at the shirt-sponsorship announcement that he was blown away by the atmosphere.

Under the partnership, Mercy Health will work with FC Cincinnati to sponsor youth soccer clinics and health and wellness events for medically underserved communities in the Greater Cincinnati area. Mercy Health is also in talks to provide team doctors for FC Cincinnati, whose deal with UC Health ends this year. ○



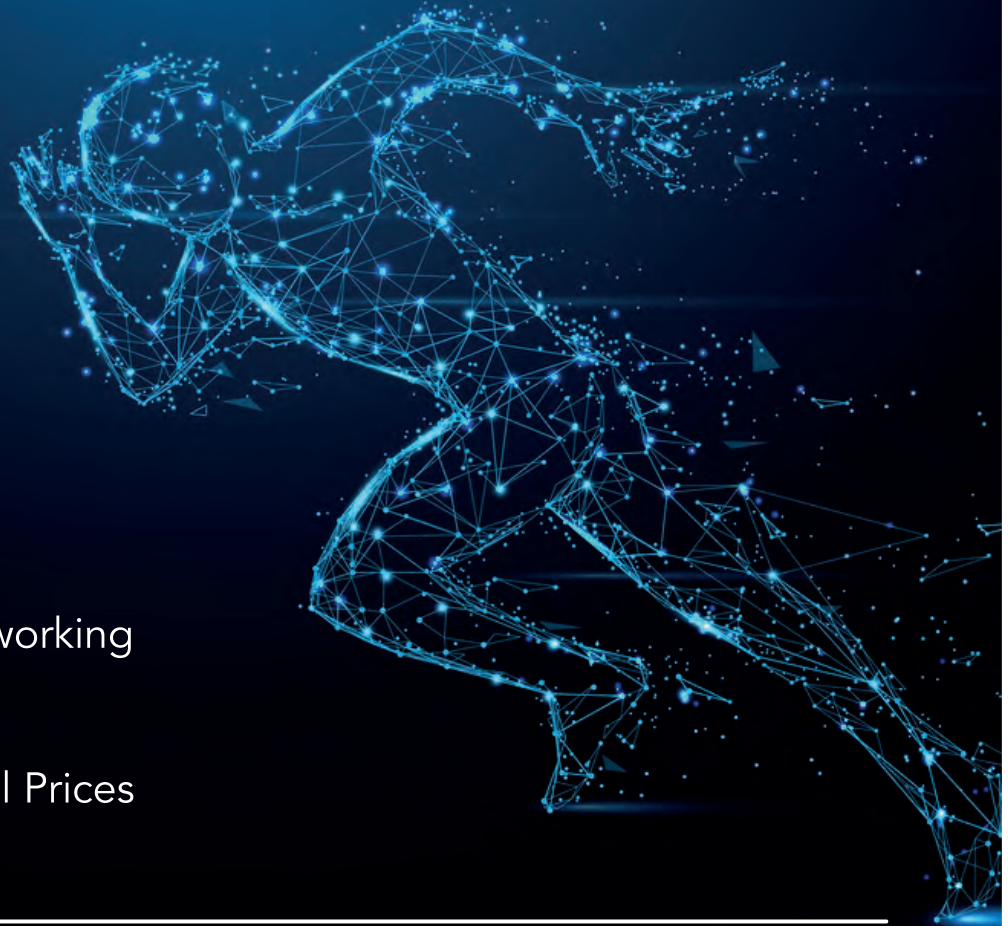
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France's rekindled love story with Les Bleus underpins big commercial gains

French Football Federation set to earn more than €100m per season from sponsorship rights

FFF tweaks sponsorship structure to provide major partners with greater exclusivity

2019 hosting of Fifa Women's World Cup will provide additional sponsorship opportunities



Fédération Française de Football marketing director François Vasseur (Valerio Pennicino/Getty Images)

Frank Dunne

After France won the 1998 Fifa World Cup and Uefa's Euro 2000, the whole world wanted to know about French football. From every corner of the globe, football people beat a path to Clairefontaine, the French Football Federation's technical centre outside Paris, to discover the secrets of the 'system'. But just a decade later French football was in total meltdown.

At the 2010 World Cup in South Africa, there was an open revolt by players against coach Raymond Domenech. This led to the resignation of the team director Jean-Louis Valentin,

who talked of "a scandal for the French, for the young people here, for the federation". After a pitiful first-round elimination, the French public rounded on the team, which had to return to Paris under a heavy police escort.

Fast forward to this month's World Cup in Russia and the picture is very different. Les Bleus go into the tournament as one of the favourites and the love affair between the team and the French people is well and truly on again.

Talking to *SportBusiness International* just before the tournament began, François Vasseur, the federation's marketing director, said: "In France, you can't buy a national team shirt, they are sold out. And the World Cup hasn't even

started. Our new social media campaign *Fiers d'être Bleus* [proud to be blue] is a big success. We have rebuilt an image. The French people like their team".

A strong showing at Euro 2016, which France hosted and lost in the final to Portugal, was a crucial building block. The fact that the tournament came just eight months after the terrorist attacks on Paris – including a failed attempt to get inside the Stade de France, where 79,000 were watching a friendly with Germany – made it a deeply cathartic experience for many French fans.

The resurgence is borne out in numbers. For men's national team games, the 81,000 capacity Stade de France is usually sold out, with a



The *Fiers d'être Bleus* campaign (Getty Images)



minimum utilisation of 95 per cent. The last 10 national team matches attracted an average live television audience of seven million per match, an audience share of about 30 per cent.

The men's national team has 5.6 million followers on Facebook, three million on Instagram (the highest of any national team, according to the FFF), 3.6 million on Twitter (the highest of any European national team), and 670,000 subscribers on YouTube. Views of video content across all platforms hit 100 million last season.

“We used to be just a rights-holder. Now we are a strong brand in our own right and a media company.”

François Vasseur | marketing director, Fédération Française de Football

The commercial ramifications of this process of renewal are significant. The federation will break the €100m (\$116m) per season barrier for sponsorship revenues from the 2018-19 season. It will earn €102.1m in the 2018-19 season, according to its latest budget. The total is about 17 per cent up on the €87.5m earned from sponsorship in 2017-18, the final year of the current cycle.

Vasseur put the revenue growth down to six factors:

- a new sponsorship hierarchy which provides greater exclusivity to five Major Partners
- enriched inventory for all partners, including greater digital and activation possibilities
- high audiences – increasing year on year – on linear television for the national team
- increased visibility and engagement with the national team on social and digital platforms
- France's hosting of the Fifa Women's World Cup in 2019
- the federation working more closely with partners to help them to maximise their return on investment.

Old and new partners

In the last 18 months, the FFF has renewed deals with the following brands: Nike, PMU, EDF, Crédit Agricole, Volkswagen, Brioche Pasquier, Coca-Cola and Belin. Its final renewal – with KFC – was signed off earlier this month.

Orange became a partner of the federation for the first time in a deal agreed in October 2017. It is paying between €5m and €6m per season to sponsor the men's and women's national teams. It does not sponsor the Coupe de France.

The federation has also brought in supermarket group Intermarché following Carrefour's decision to withdraw from sports sponsorship to focus on events linked to food and retail. Carrefour has been a sponsor of the national team since 1998 and a sponsor

of cycling's Tour de France since 1993.

Most of the deals in the new cycle are for five years. In the past, deals were typically for four years. The difference is due to the 2022 World Cup in Qatar taking place between November and December, instead of in its usual June/July slot. Most sponsors wanted to have a full World Cup season included in their deals to maximise activation and promotional opportunities.

Eight of the 14 partners – Nike, PMU, EDF, Crédit Agricole, Volkswagen, Intermarché, Brioche Pasquier and KFC – sponsor the Coupe de France as well as the national teams. The cup provides high levels of visibility, especially when the top teams, such as Paris Saint-Germain and Marseille, are involved. But the vast majority of the value in the deals is in men's national team.

“Visibility is important but the conversations with partners now are about a wider value proposition,” Vasseur said. “We used to be just a rights-holder. Now we are a strong brand in our own right and a media company. We are the biggest sports digital proposition in France. We can deliver brands our 13m fans across social media platforms. We have a database with between 2.5m and 3m fans which brands can tap into when marketing offers, products and services.”

China

The federation this year signed its first regional sponsorship deal, a one-year contract with Chinese kitchen appliances

company Vatti. The company has the same rights as the other licensors, such as the ability to use marks and logos in promotions, but no visibility or signage rights around matches.

More deals in China are expected to follow. The federation and the French football league, the Ligue de Football Professionnel, jointly opened an office in Beijing in February 2017. The office has six strategic objectives:

- to export French training schemes
- to make French competitions [Ligue 1, Ligue 2, Coupe de la Ligue, Coupe de France] and national team matches more attractive to a Chinese audience
- strengthen strategic links with Chinese partners
- accompany French clubs in their strategy of economic extension
- develop audiovisual exposure of competitions with new broadcast partners
- look for sponsors.

At the time the office was opened, federation president Noël Le Graët said China represented “a driver of growth and a great opportunity to promote French football”.

Women’s World Cup

France will host the 2019 Women’s World Cup, which will take place between June 7 and July 7. It will feature 24 teams playing in nine venues around the country.

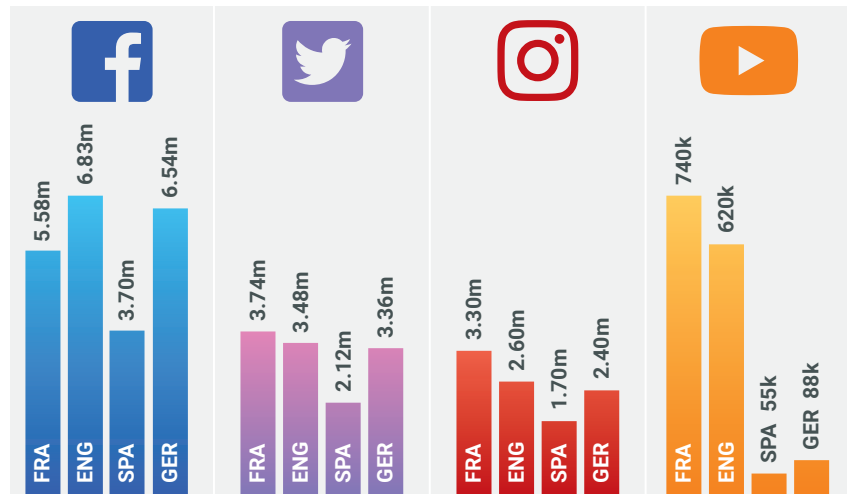
“The Women’s World Cup is a really important factor for our partners, due to the growth of women’s football”

François Vasseur | marketing director, Fédération Française de Football

The main commercial rights to the competition are sold by Fifa, football’s world governing body. But as host, the French federation will sell six national sponsorship packages, which include LED time, tickets and the right to use Fifa and World Cup marks and logos.

The rights are not included in the existing sponsorship deals, but it is

FOOTBALL FEDERATIONS ON SOCIAL MEDIA



Source: sportbusiness.com



France midfielder Paul Pogba (Getty Images)

understood existing Major Partners have an option on them. Deals for the six packages are expected to be in place by the end of the summer.

“The Women’s World Cup is a really important factor for our partners, due to the growth of women’s football,” Vasseur said.

The federation has worked hard to develop the women’s game. After the 1998 edition of the men’s tournament, the FFF set up a dedicated women’s section at Clairefontaine. Most of the top clubs also set up academies for young women players. The country had 106,000 registered women players in

2017 and over 2,000 registered teams. The women’s national team is currently ranked fifth in Fifa’s world rankings. Home matches have an average attendance of 15,500.

A strong showing this month by the men in Russia and next year by the women on home soil, will only serve to deepen the love affair and strengthen the financial standing of the French federation. But success has a deeper value. As Le Graët told *SportBusiness International* ahead of Euro 2016, a France that wins “helps bring people together, especially in difficult times like today”. ○

Betting legalisation promises a new era for US sports

The potential of US sports betting will only be maximised if rights-holders focus on maintaining integrity, argues Genius Sports' **Ben Paterson**.

Cooperation is key: The PGA Tour has openly supported the required use of official data for sports betting



New US legislation which allows states to legalise sports betting is set to open the floodgates to new revenue for clubs and leagues but, according to Ben Paterson, integrity operations director at Genius Sports, this potential will only be maximised by following the path blazed by the Premier League and other sports bodies worldwide to capitalise on the use of official data and focus on maintaining integrity.

“We see the recent overturn on the federal ban on sports betting in the United States as one of the most important developments in world sport in years. New legislation is being drafted state-by-state and that means it will take time to spread across the country, but the fact is that these are exciting times and there will be huge opportunities

for sports in terms of revenue, fan engagement and safeguarding the integrity of competitions,” he said.

“All parties are currently asking, ‘what’s in it for us?’ and it’s certain that over time, leagues and teams could benefit hugely.”

But, says Paterson, the key to building firm foundations for a responsible and sustainable US sports betting sector is to “engage with, monetise and utilise official data”.

“Each state is in a unique position to create leading frameworks for regulated sports betting. There’s a massive opportunity here to require the use of official data amongst all licensed betting operators because it’s central to protecting consumers and competitions while helping to eradicate the black market.”

Official data has helped create the in-play betting market which has driven huge growth in the sector in recent years. The alignment of real-time, official data with access to digital connectivity has transformed an activity which – in those territories where it was legal – often had a negative image.

Today sports betting – particularly live, in-play betting – has become an accepted recreational social activity.

“In-play has transformed the sports betting industry by attracting new customers that are drawn to the new rapid-fire, engaging betting markets. These markets are powered by official data which is fundamental to some of the world’s largest betting operators including William Hill, Betfair and Paddy Power,” said Paterson.

“This type of betting hasn’t been experienced in the US yet, but we fully expect the country to follow the UK’s lead with official data helping to power this in-game sports betting revolution.”

The anticipated legalisation of sports betting in the US brings risks as well, and underscores the necessity for rigorous integrity provisions across sport and the entire betting sector.

While there are no exact figures on the size of the betting black market, Americans continue to take risks with their money, and feed the roots of corruption in sport by betting illegally with unlicensed offshore sites.

Paterson explains: “Sports betting already exists in the US. However, prohibition has driven this market underground where customers have been betting with offshore operators who provide no tax benefit to the states and threaten to compromise the integrity of sports through a complete lack of visibility of their customers’ betting patterns.

“In the UK, experience has shown us that effective legislation can help eradicate illegal markets. This must be a key priority for every state legislator and can be achieved by including measures to ensure licensed operators have access to official data. This will help to ensure the creation of the most engaging in-play products with thousands of different markets, providing a huge competitive advantage over offshore or illegal bookmakers.”

If the move to legalised sports betting is well thought through, the result will help to protect the integrity of sport.

The threat of match-fixing is exacerbated when there is little or no oversight of the bets being placed, as is the case with unlicensed bookmakers.

But legalisation, and applying strict rules to all licensees helps to create a new transparent market that shifts public perception away from its murky view of sports betting in the past.

“There is a common misconception that legalising betting, and thus increasing the levels of wagering, can

threaten the integrity of sports. In reality though, the opposite is true as regulation affords transparency, cooperation and the sharing of information which are all vital components to combatting match-fixing.

“This is a great opportunity to enhance the integrity of US sports by establishing a robust framework with clear rules and regulations from the outset,” said Paterson.

This is a world that Paterson and his colleagues know well. Over the years Genius Sports has developed and delivered integrity services for sports bodies, embracing every element of the process – from ensuring they have the rules and regulations they need to combat betting-related corruption, through monitoring of betting patterns to identify suspicious activity, the education of players, coaches and officials, to providing specialist integrity officials and, where a case is brought, providing expert testimony.

“There is a common misconception that legalising betting ... can threaten the integrity of sports”

Ben Paterson | Genius Sports

An example of its approach is the company’s work with the PGA Tour which launched its new Integrity Program in January, designed to “maintain integrity and prevent and mitigate betting-related corruption in its competitions”.

Genius Sports’ bet monitoring system provides the Tour with 24/7 protection. It compares real-time odds movements from betting markets worldwide with predictive algorithms to highlight any suspicious activity.

Genius Sports has also delivered a customised e-learning service which the Tour has made mandatory for all players, caddies and officials. It

enables the Tour to demonstrate the rules, expectations and consequences associated with betting-related corruption for stakeholders worldwide.

“For sports, the combination of clear regulations, monitoring, education and effective sanctions is critical to maintaining the transparency of their competitions,” Paterson said.

“But as we have seen in other mature betting markets, specific legislation can also provide vital protection to the integrity of sports. In the UK, there are a number of specific provisions in an operator’s licensing criteria that helps safeguard sporting competitions. This includes reporting suspicious activity to the Gambling Commission and conducting strict ‘Know Your Customer’ measures to build accurate profiles on their bettors.

“The major US sports leagues are already taking proactive integrity measures. But going forward, the recent legalisation of betting may require them to increase their efforts around education. More than ever, leagues and teams will have vital information such as what constitutes as insider information, the rules against betting on their own or other sports’ competitions and what the potential consequences can be.

“The PGA Tour are leading the field in this regard and I expect to see other sports ramping up their educational efforts going forward.”

For Paterson, the huge opportunities which US sport now embraces need strong, enforceable regulation to ensure that they are not diluted.

“There is no guarantee that current US customers will migrate from their offshore bookies to fully-licensed operators. However, regulators and lawmakers need to capitalise on this unique opportunity to create a sustainable regulatory framework that has integrity at its heart and encourages the licensed betting operator to thrive.

“That is why we see official data as the driving force that can usher in a new era for sport in the US.” ○

Norwegian Football learns from the Catholic church to improve its service

Norwegian Football Federation teams up with academic to create consistent, compelling customer experience

Academic draws on theories around sacred rituals and drama for deeper and more emotional fan journey

Design team identify 14 'meaningful service encounters' to do with a match

THE NEVER WAVERING, ETERNAL VALUES
RÅSKAP STOLTHET SAMHOLD



THE GRAND NARRATIVE: THE QUEST OF THE UNDERDOG 2015 - 2022



Kevin McCullagh

When Pearse Connolly, the Irishman who heads digital services at the Norwegian Football Federation, set about revamping the marketing of Norwegian national team home matches in 2014, he didn't expect to plumb the depths of the Norwegian national psyche, use the Catholic church as inspiration, or employ a graphic novelist to sell the idea to staff.

Thanks to a collaboration with Oslo-based designer and academic Ted Matthews, Connolly and the NFF did all this and more, as part of a project that has profoundly changed how Norwegian football thinks about its fans and matchday experiences.

The project involved marrying 'sacred theory', a set of ideas about why certain

rituals produce meaningful and highly emotional experiences, to the growing field of service design. This sounds abstract and academic, but Matthews and Connolly believe the outcomes will speak to every sports fan: an understanding of why people actually attend sport in the first place, and an enhancement of the things that make it a compelling experience.

Service design

Service design is the crafting of customer experiences and journeys. For example, a service designer revamping an airline's first-class experience could look at 'touchpoints' such as: booking the tickets online, the design and feel of printed tickets, the walk through the airport and lounge, how airline staff interact with the customer. The designer would direct how each interaction

should be with the aim of the customer walking away happy with the experience. In the past, such projects were carried out piecemeal by different departments, without a guiding hand steeped in design theory.

Matthews points to Apple as a company that, while not explicitly incorporating service design principles, produces the type of compelling, consistent customer experience that service designers aim for. He says: "It's about delivering a consistent experience across their devices, their website, their shops, the hardware, the software updates, unboxing the products – everything. They have a very clear vision of what they want to deliver."

Sacred theory

It is easy to see how these ideas might apply to sports events and fan journeys.

But Matthews wanted to take the discipline a step further by drawing on theories around sacred rituals and drama, which he captures under the term ‘sacred theory’.

After working in the corporate world and public sector for more than a decade, Matthews had taken a break to explore the application of sacred theory to service design via a PhD at the Oslo School of Architecture and Design. The NFF project was part of his academic work, alongside projects with Norway’s largest telco and the national postal service.

“My view is that service design has become particularly functional,” he says. “It’s good at understanding things from a customer perspective and making them easier to use. But that can be quite a sad thing in some ways – some experiences don’t need to be more functional. That’s the reason I ended up looking at sacred theory.”

The core idea is that sacred rituals can provide a structure for designing experiences that are meaningful and emotional. Sacred rituals often have similar, three-part structures:

- Separation – the group celebrating the ritual is separated but participates in preparatory activity that ‘peels away the everyday’;
- Transition – the group comes together and shares a profound experience;
- Reincorporation – activity that reinforces the meaning of the ritual, and returns the group to the ‘everyday’, or normal life. Christian marriages, for example, begin with an engagement and stag/hen celebrations, then comes the wedding ceremony, and afterwards the honeymoon and return to society of the newlyweds, whose status has profoundly changed.

Sacred theory “sounds very fluffy,” Connolly says. “If you go and start talking to people about it they just want to hear about brand, or they just want to hear about the commercial aspects. But you’re saying, ‘Take a step back for a minute, because the commercial will all fall into place if you really understand the ‘Why?’ factors’.

“Why are people actually interested in this? Why did football develop against

the cultural backdrop that it did, at the time that it did? What does it mean in a society that is changing, where a lot of the factors that drove the growth of football, whether it was the initial growth and participation, then the change to a TV product, are now changing?”

Matthews is acutely aware of sports fans’ sensitivity to commercial over-engineering. He knows his work could be perceived as part of that, or an even more malign extension in which fans’ deepest emotions are manipulated. But he believes the application of his ideas could actually achieve the opposite – a preservation of what is most important to fans.

He says: “Football is a ritual. We know it is. We know what happens when it becomes defiled, and what that feels like. If it’s all about the money or business, something that is essentially quite sacred has been defiled.”

Using a grant from the Norwegian Research Council aimed at seeding cutting-edge design thinking throughout industry, Matthews worked with Connolly and the NFF between November 2014 and June 2015 on a project centred on the experience at the ‘sacred rituals’ of Norwegian men’s senior national team matches.

The grand narrative

Matthews’ first step was to understand why national team football was important to Norwegians, and what were the myths and ideas that surrounded it. Fans, the Norwegian supporters alliance, players, NFF staff, and stakeholders at the national stadium, Ullevaal Stadion, were interviewed.

The aim was “to understand a sense of self for the team, the fans and for Norwegian football as a whole through aggregating legends, stories, symbols, artefacts, songs and other cultural expressions of the community. The Football Association’s archive was also investigated to locate artefacts that had meaning”.

“We looked at the symbols, the big stories related to the team,” Matthews says. “There is the Norway v England commentary in 1981 (the famous ‘Maggie Thatcher, your boys took a hell of a beating’ oration - see video, below). That is an artifact of the Norwegian sense of self. It’s about the underdog

that comes through.”

Other stories that back up the underdog narrative include the team beating Nazi Germany in the 1936 Olympics bronze medal match, beating Brazil at the 1998 World Cup and – beyond sport – in stories like that of the ‘heroes of Telemark’ World War II resistance fighters.

The quest of the underdog – one of Christopher Booker’s ‘seven basic plots’ – was chosen as a ‘grand narrative’ for the team that would inform the design of all other parts of the experience. It was chosen as something that would ring true with fans. Norway had always been, and in footballing terms still is, a small nation trying to punch above its weight. As Matthews wrote in a 2017 article:

This narrative was not just about one match or one qualifying campaign, but was designed to be used over three years, covering the Euro 2016 and World Cup 2018 qualifying campaigns and, hopefully, tournaments.

“We went from the idea of just selling one qualifying campaign, or one particular match...to this idea of, ‘What’s our grand narrative?’” says Connolly. “... And we found that when we started to

“What is important is...the myth, a metaphor of some truth, fits with the reality so as to feel authentic.”

Ted Matthews | PhD fellow, Centre for Design Research

build messaging, whether it was radio spots, or the visuals that we did, around the quest narrative, that really resonated with people.”

The narrative is used in marketing campaigns and promotions for matches. Marketing and messaging is modulated throughout the period – ‘turning the volume up and down’, as Matthews and Connolly refer to it – in order to communicate with fans effectively.

“The people that do this really well are the likes of the Catholic Church,” Connolly says. “They’ve been doing



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ON THE WAY

it for two thousand years. Turn up the volume Easter on a certain set of ideas, turn up the volume on the liturgy at Christmas, to have the same sort of idea but a completely different feeling.”

Matthews and Connolly conceived of the match as a five-act ritual.

Each match is a separate ritual within the narrative and is designed in five phases:

- Before
- Separation
- Transition (the match itself)
- Reincorporation
- After.

Within these phases, the design team identified 14 ‘meaningful service encounters’ (MSEs) – moments where fans would encounter something significant to do with the match. These MSEs were carefully designed to enhance the fans’ experience, in a way that aligned with the grand narrative. Examples included:

Call-up

To emphasise the importance of a national team call-up in a visible way for both players and fans, instead of the traditional phone call or text message, players were sent specially-designed gift boxes containing the shirt, a message saying ‘Ja Vi Elsker’ [‘Yes, we love’ – a motto of the national team drawn from a patriotic song] and several keepsakes. For one women’s team match, these keepsakes included a booklet with graphics showing the story of women’s football in Norway. Some players posted videos of themselves opening the boxes on social media, allowing this element to reach the fans.

An NFF document detailing the project explains: “Creating a small ritual or meaningful moment would communicate better the sense of privilege and importance of being called up to play for your country.”

Team bus design and arrival at the stadium

An initial design for graphics on the team bus that had large images of players standing in kit with their chests puffed out was rejected for not fitting the underdog narrative. A more modest design was chosen focusing on the team’s crest and a stencilled list of matches to which the bus had transported the team.

The design team sought to enhance the moment when players got off the bus at the stadium and where fans greet them. Players were asked to wear suits instead of tracksuits and headphones, to reflect the importance of the occasion. The bus had traditionally pulled up in a carpark next to a busy train station, which made for a distracting backdrop so the view to the station platforms was covered with large graphics displaying snowy Norwegian mountains and the team motto.

Stadium playlist

During the build-up to matches, the DJ in Ullevaal Stadium had been playing high-tempo pop music. After feedback from fans, the playlist was changed to Norwegian songs and anthems that home fans would know and sing along to. The fact that away fans would not know the songs was considered a positive – it enhanced the competitive atmosphere inside the stadium.

Results

Did all this work produce the desired effect? Did Norwegian fans enjoy

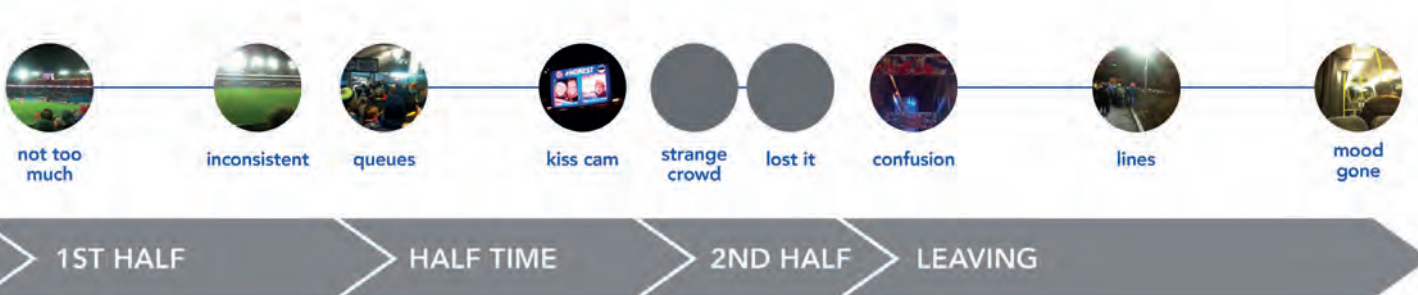
amazing matchday experiences – ‘collective effervescence’, to use sacred theory terminology – and pack the stadium as a result?

Connolly and Matthews admit they don’t yet have strong data showing positive results. Norway’s poor performances on the pitch hit attendances during the project. Post-match interviews and surveys with players and fans at the stadium returned positive results, but have not yet been conducted rigorously. However, there are other signs of success, and Connolly is effusive about the future for the method.

Service design principles were used to create a fanzone for Norwegian Eliteserien (top-tier) football club Odd that proved so successful the model is being rolled out to all league clubs compulsorily. “We get 1,000 people into the fanzone at Odd,” Connolly says. “People come earlier and spend more.” The fanzone was created using service design principles, and according to Connolly was “not just a commercial fanzone, but a fanzone that would emphasise their story, their symbols, their view of their future... In the fanzone you have a series of activities that tell the story of the club”.

The NFF has also created a tool, Match+, for league clubs to work out their role in their community, their symbols, and their narratives. “The feedback from clubs is great,” Connolly says. “It’s a very simple set of tools for them to start to communicate based on these things.”

And as part of the federation’s strategy at national-team level, the commercial department has two new strategic goals based on measures of fan



sentiment: “Make me proud”, and “Give me a good social experience”. These aim to discover the effectiveness of the service design measures. The federation is working with digital media measuring firms on a tool that will scan Norwegian media and social media before, during, and after games to see how people respond to their experiences.

Connolly says: “If you actually took the approach of: ‘This is a story, this is an experience, it has various moments in it,’ then I think, just as you do in screenwriting, just as you do in drama, you can both have an effect on and emphasise certain elements that will give people a better experience. And the causal effect of that will be a deep relationship with your team. That’s why I think there’s a huge amount of potential in this discipline.”

Evangelists required

Because the adoption of the service design approach is so pervasive, touching so many aspects of an organisation, it is critical that it has the backing of senior staff, Matthews says. Connolly’s enthusiasm was the key driver within the NFF.

“When designing front-end experiences, you have to work with back-end delivery,” Matthews says. “Experiences are ‘co-designed’ at the point of consumption. That is dependent on many different people. You have to make sure everyone is on board with the concept. This means the security staff, the ticketing people, the guy selling sausages in the venue, right up to the boardroom.”

To help communicate the project internally, the NFF employed an artist to create graphic-novel-like imagery illustrating how different parts of the project would play out.

Matthews and Connolly say the additional cost of introducing service design thinking into a sports organisation need not be too great. The NFF project had a total cost of about €100,000, of which €60,000 was funded by the Norwegian Research Council. Connolly said this included initial research that would not have to be repeated in future. He has also used the project to develop some low-cost tools – PDF guidebooks, essentially – that will allow others in Norwegian football to employ the principles.

“Experiences are ‘co-designed’ at the point of consumption. You have to make sure everyone is on board with the concept. This means the security staff, the ticketing people, the guy selling sausages in the venue, right up to the boardroom...”

Ted Matthews | PhD fellow, Centre for Design Research

Effective employment of the principles would probably require one full-time staff member at a venue being in charge of experience, Matthews says. “It’s about arranging things in a particular way rather than buying a load of new stuff - so not a colossal amount of money,” he adds.

Keeping fans inside

Matthews is wary of his work being interpreted as manipulative. The meaning people attach to sport makes it both perfect and dangerous ground for sacred theory-driven service design.

“It has a lot to do with your motivation and why you are designing something,” he says. “You can design the artificial, or you can curate what is meaningful for people...Football is in a good position to use this because football is meaningful. You maybe wouldn’t want to use it at a launderette.”

Arguably, the approach has produced results that a stereotypical, ‘old-school’ sports fan would welcome – players in suits, scrapping pre-match pop music, and, as Matthews says, “trying to get people to put away their mobiles, and take part in the experience.”

The NFF met with hardcore Norwegian national team fans early in their project. “They are the ones that are most sceptical, who will just say, ‘Forget it, we make our own culture, this is our department,’” Connolly says. “You have to respect that. But you can also say to them, ‘We’re trying to understand what motivates you and how we can work with you to emphasise those things that do it for you...so that more and more people get the same relationship, and feeling, and meaning that you do.’”

Elements of the experience that were important to these fans were analysed for improvement. Connolly continues: “They talked about this idea of the gladiator effect, the cauldron effect, of standing on a terrace...but that on the way into the arena and on the way there it doesn’t feel like that at

all.” Flags, symbols and signage were introduced at the stadium train station, on the walk to the stadium, and around the stadium itself to try to achieve the desired effect.

“Each of these little touchpoints along the way, you work with the fans to emphasise it,” Connolly says. “And you have to be very, very clear: ‘This isn’t to squeeze more money out of you, this is to make it a better experience.’”

A new approach

Switched-on sports organisations have been making some of the changes instituted as a result of the NFF project for years. Matthews and Connolly point to English Premier League club Everton as one organisation that has developed a powerful understanding of its place in its community, and used that effectively in fan engagement.

What is significant about the sacred theory-led service design approach, they say, is that it provides a methodology for doing these things in a consistent, considered way, right across an organisation.

“Some clubs and associations do this, but they do it ad-hoc,” says Connolly. “I think the value of the rigour that comes through an academic discipline could help us structure that up.”

Even before considering the ‘sacred’ elements, service design principles could be employed to good effect in sport, he adds: “Looking at where the friction points are, looking at where the

pain points are, and trying to take that away. That’s also an area of the industry in which we can do a huge amount.”

But the sacred elements provide the secret sauce that gets Matthews and Connolly excited. Again, they are not the first to think deeply about this – there is plenty of academic work, such as that promoted by the Football Collective, around why football and sport is powerful and important to communities.

“I think most people in the commercial departments at clubs and associations are either unaware of that work, or don’t really use it in a productive way,” Connolly says.

He adds: “We’ve become very sophisticated at certain elements. We’ve got really good at understanding supply-side management for ticketing or whatever – a whole set of things on the business side. But we lack the real, deep: ‘Why do people bother in the first place?’”

Some may interpret the approach as simply ‘good branding’, but it goes beyond that, he says: “People who get brand and put it at the centre of things are on the way. But I definitely think there’s an opportunity – that this complements the brand stuff – to add this aspect of a deeper meaning and a deeper relationship that I don’t feel you get through brand.”

Matthews and Connolly believe the refocus demanded by their approach could have a genuinely positive impact on fan communities.

“There’s a lot of theory about how shared collective experiences have a positive impact on you, your local society, and on a national level, which I don’t think the industry really does enough about,” Connolly says.

He adds: “In general, people are living more comfortable lives but sharing [fewer] things together. I think... that sports in general and football in particular has a huge opportunity to say these are basic human needs that we’re answering here.”

The future

For now, Norwegian football is the only testing ground for Matthews’ work. But both men think the approach has potential to be rolled out to other sports organisations.

“This is something that, if we got some of the big clubs to think about it and do it, that it could start a broader movement around it,” Connolly says. “I talk individually through Uefa and Fifa to people at clubs, and they get it. But it’s, ‘Where do I start?’”

Matthews points out that the challenge for major clubs that are global brands is different than for national teams and smaller clubs. How do they appeal to fans around the world, while also putting this big focus on their roots and supporter base?

“With football, there is a community,” he says. “You need to find the story and narrative that people relate to and reflects who they are... It’s easier with Burnley than for Manchester City.” ○





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School's In

SPORTBUSINESS' ANNUAL SURVEY OF THE
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HOW THE INTERNET IS
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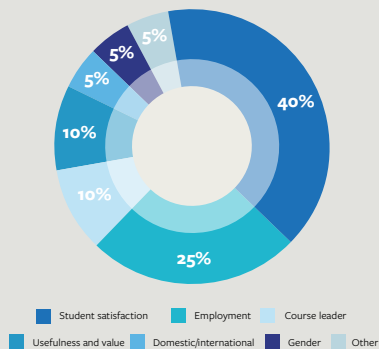
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SportBusiness



WELCOME | THE 2018 SPORTBUSINESS POSTGRADUATE RANKINGS

HOW THE PGR SCORE IS CALCULATED



Student satisfaction: a maximum of 40 points is derived from quality of alumni support (10pts), satisfaction with quality of teaching (10pts) satisfaction with quality of support (10pts), and quality of extra-curricular support (10pts).

Employed within six months of graduation: up to 25 points are awarded based on the proportion of the course's 2015 alumni who, six months after graduation, have gained full-time employment in the industry; were interns which led to a full time career; or enrolled on a related PhD.

Course leader: a maximum 10 points comes from course leaders, who selected their top five postgraduate courses.

Value and usefulness: a maximum of five points based on how valuable the course has been in the career of students, and up to a further five points based on how often graduates use the skills taught on the course.

Domestic/international student ratio: up to five points are awarded based on the split between students from within and outside the course's home country.

Gender ratio: up to five points based on the split between male and female.

Languages: a maximum of two points are awarded depending on the number of languages used to teach.

Salary: up to two points based on average salary three years after graduation.

Work placement: one point if a work placement/internship is part of studies. ○



Welcome, once more, to the SportBusiness Postgraduate Rankings.

The 2018 edition is, perhaps unsurprisingly, the biggest and most detailed we have ever produced. While our aim has remained unchanged since the inception of the rankings in 2012 – to provide the most reliable and respected rankings system for postgraduate sports management courses across the world – the scope has increased with each new edition. This year, well over 1,300 surveys were completed by alumni and course leaders from 75 universities.

As ever, we consulted an advisory board of leading academics to gather feedback on the last rankings process before the launch of the 2018 edition. Based on their input, several changes were made to the methodology for this year's rankings.

The first major change saw the introduction of the 'usefulness' and 'value' criteria. Graduates were asked to assess how useful the skills taught on the course were to their current employment, taking into account the quality of course content, the

“We’ve always had a focus on the student experience, and I think that that translates and resonates well”

SCOTT MINTO

SAN DIEGO STATE UNIVERSITY, **PAGE 16**

standard of teaching and the provision and quality of work placements or internships. They were also asked to rate the course's value in furthering their careers and securing their current roles. These two measures each represent five per cent of the schools' overall scores.

To accommodate this, course leader weighting was lowered from 15 per cent to ten per cent of the overall score, and the student satisfaction score from 45 per cent to 40 per cent. The 2018 list better represents the views of the people who best understand the impact of the courses: the alumni.

As in 2017, the course leaders were again asked to select both the top five courses

“We have maintained this wonderful culture of support. I think that’s what drives this programme and it’s what makes us unique and really gives us our primary competitive advantage”

GREG O’SULLIVAN FROM THE NUMBER-ONE RANKED OHIO UNIVERSITY, **PAGE 8**

and the top five business schools outside their own, with the selection of the top five business schools or faculties based on the institution’s overall academic reputation; quality, number and standing of staff; the number and quality of papers published; and research capability.

Similarly, we maintained the extended employment measurement period, of six months rather than three, to allow a more realistic timeframe for students to enter the workforce.

And the winners are...

For the sixth time in the seven-year history of the rankings, Ohio University claimed the top spot. The University of Massachusetts Amherst, or UMass, again finished runner-up in the overall ranking, and in the course leaders’ selection, where it was also beaten by Ohio.

American colleges continue to dominate the list, with only two entries to the top ten – Australia’s Deakin and The International



Centre for Sport Studies (CIES) in Switzerland – coming from outside the United States. This is down from three in 2017, due to the Russian International Olympic University falling one place into 11th. CIES’ dominance over the European rankings mirrors that of Ohio in the US, as it also claimed its sixth victory in seven years.

The biggest riser in the list is the University of South Florida, which is up to fourth this year, having made its debut at

19th in 2017. USF only began its postgraduate sport management programme in 2012, the year this list was founded.

On the following pages you will find reaction and insight from several of the course leaders involved in the programmes that make up this ranking. As well as hearing from the top three universities in the US and Europe, there is also a look at how a new course can establish itself, what leads to student satisfaction, and analysis of the growing sector of online learning and MOOCs (massive open online courses).

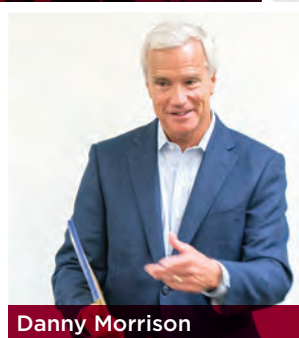
We also present the full list of the top 40 courses overall and the top 15 for both North America and Europe. Separate tables show the course leaders’ and graduates’ choices and an analysis of the employment status of students before and after graduation.

SportBusiness International would like to thank all the course leaders and alumni who participated in the rankings, and we hope you find the supplement a useful guide to this dynamic sector. **O**

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- Susan O’Malley**, first female president of a professional sport franchise;
- Stephen Shapiro**, editor of Sport Marketing Quarterly; and
- Sporty Jerals**, consultant and former manager of the Charlotte Coliseum.



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Ohio University might be the birthplace of sports business education, but it's equally important that we're focused on the future. A future that's fueled by the best alumni network in the world, students who dare to do more, faculty who push us to innovate, and employers who recognize the skill and dedication of our graduates. Together, with the support of the AECOM Center for Sports Administration, we're preparing to change the face of sports business.

For the sixth time in the seven-year history of SportBusiness International's Postgraduate Rankings, OHIO's Master of Sports Administration program thanks the countless number of people who have brought us this far, and who will continue to lead us into the future.

Learn more at business.ohio.edu/sportsad.



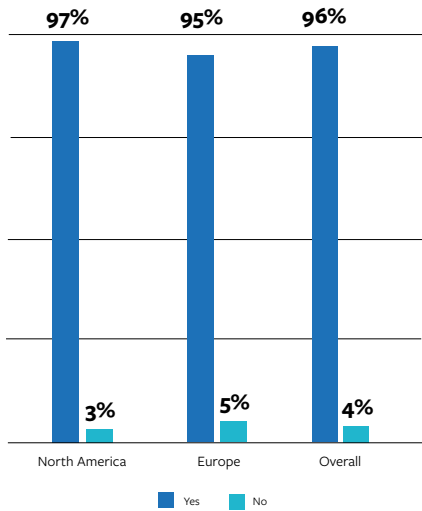
OHIO
UNIVERSITY

DEPARTMENT OF SPORTS ADMINISTRATION
COLLEGE OF BUSINESS

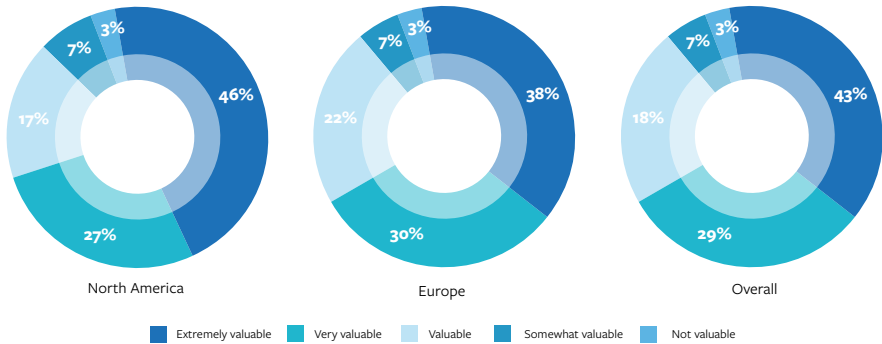


PGR 2018 DATA | SPORTS MASTERS IN NUMBERS

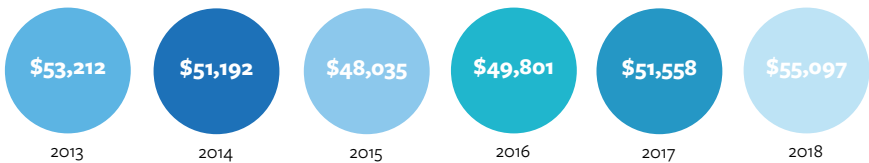
Would you recommend your course? (%)



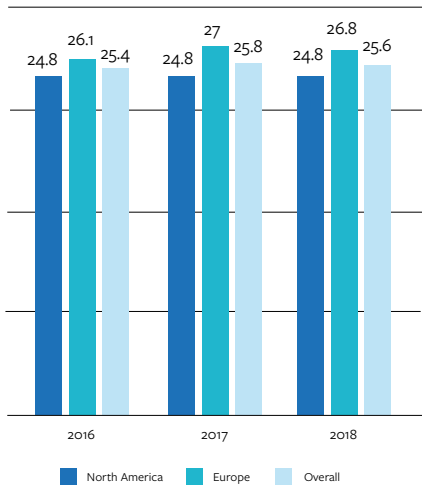
How valuable has the degree been in furthering your career? (%)



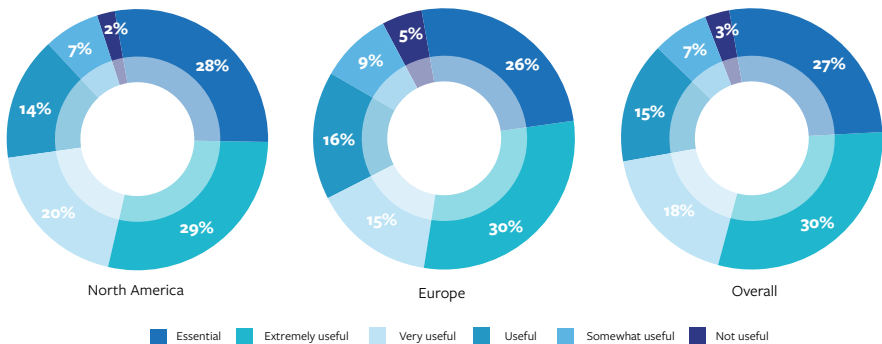
Average salary of graduates



Average student age (years)



How useful have the skills and knowledge taught in your course been in performing your current position/employment? (%)





TOP 40 | POSTGRADUATE SPORTS BUSINESS COURSES

RANK	COURSE PROVIDER	COURSE
1	Ohio University	Master of Sports Administration
2	University of Massachusetts Amherst, Mark H. McCormack, Dept of Sport Management	MBA/MS in Sport Management, MS in Sport Management
3	George Washington University	Master of Science in Sport Management
4	University of South Florida	MBA/MS in Sport & Entertainment Management
5	The International Centre for Sport Studies (CIES)	The Fifa Master
6	University of South Carolina	Master of Sport and Entertainment Management
7	San Diego State University	Sports MBA
8	Deakin University	Master of Business (Sport Management)
9	University of Central Florida	DeVos Sports Business Management Program
10	University of San Francisco	Master in Sport Management
11	Russian International Olympic University	Master of Sport Administration
12	University of Oregon, Lundquist College of Business, Warsaw Sports Marketing Center	MBA Sports Business
13	Centro de Formación Fundación Valencia CF	Master in International Sports Management
14	Ohio State University	Master of Science in Kinesiology, Sport Management
15	Virginia Commonwealth University Center for Sport Leadership	MEd/MBA Sport Leadership
16	Sheffield Hallam University	MSc Sport Business Management
17	Columbia University	MS Sports Management
18	University of Louisville	MS in Sport Administration
19	University of Parma - University of Republic of San Marino	International Master in Strategic Management of Sports Organisations, Events and Facilities
20	Temple University	MS in Sport Business
21	Georgia State University	Master of Science in Sports Management
22	University of New Haven	M.S. Sport Management
23	AISTS	Master of Advanced Studies in Sport Administration and Technology
24	University of Windsor	Master of Human Kinetics in Sport Management
25	Seattle University	Master in Sport Administration and Leadership
26	University of Tennessee	Master in Sport Management
27	Johan Cruyff Institute	Master in Sport Management
28	University of Liverpool Management School	MBA Football Industries
29	Florida Atlantic University	MBA Sport Management
30	Real Madrid Graduate University	MBA Sport Management
31	New York University Preston Robert Tisch Institute for Global Sport	Master in Sports Business
32	Florida State University	Master in Sport Management
33	University of Bayreuth	MBA Sport Management
34	Arizona State University	Master in Sports Law and Business
35	Georgetown University	Master in Sports Industry Management
36	AMOS	Master of Business in Sport
37	Vrije Universiteit Brussel	Postgraduate Course Sports Management
38	Texas A&M University	Master of Science in Sport Management
39	Coventry University	MSc Sport Management
40	MBA ESG	MBA in Sport management

CLASS SIZE (2014/15)	COURSE DURATION (MONTHS)	LANGUAGES	WORK PLACEMENT	AVERAGE AGE (YEARS)	FEMALE STUDENTS (%)	FOREIGN STUDENTS (%)	EMPLOYMENT (AT 6 MONTHS)	COURSE LEADER SCORE	STUDENT SATISFACTION SCORE	VALUE SCORE	USEFULNESS SCORE	TOTAL SCORE
27	22	English	Yes	26	43%	14%	25.00	10.00	38.89	4.56	4.22	92.66
25	12-21	English	Yes	26	27%	23%	23.33	9.00	37.58	4.46	4.06	88.44
18	15-24	English	Yes	24	40%	30%	25.00	3.00	38.67	4.78	4.57	88.01
27	21	English	Yes	24	60%	12%	24.48	4.00	38.25	4.29	4.28	85.30
31	10	English and French	Yes	29.2	28%	81%	23.44	5.00	37.38	4.69	4.55	84.05
50	12-15	English	Yes	24.5	46%	16%	23.96	3.00	35.83	4.50	4.29	81.58
25	18	English	Yes	26	29%	21%	21.53	1.00	39.00	4.56	4.64	80.73
75	24	English	Yes	27	20%	80%	25.00	7.00	31.09	3.82	3.71	80.62
26	17	English	Yes	29	48%	12%	22.92	2.00	37.00	3.67	3.78	79.37
101	23	English	Yes	25	39%	12%	22.77	1.00	37.18	4.16	4.06	79.17
55	10	English and Russian	Yes	30.9	38%	39%	21.88	1.00	34.50	3.67	3.61	78.65
21	18	English	Yes	26	27%	23%	19.64	6.00	35.00	3.79	3.99	78.42
18	9	Spanish	Yes	25	22%	44%	22.22	0.00	36.20	4.40	4.44	78.26
14	12-24	English	Yes	23	43%	7%	25.00	2.00	34.18	4.18	3.64	78.01
54	12-18	English	Yes	25.7	22%	7%	23.08	1.00	38.07	4.27	4.27	77.69
30	12	English	Yes	25.2	20%	46%	20.31	1.00	37.00	4.25	4.12	77.68
60	12-16	English	Yes	27	33%	30%	21.88	3.00	35.00	4.00	3.78	77.65
23	18-24	English	No		61%	7%	25.00	1.00	35.11	4.00	3.88	76.99
20	12	English and Italian	Yes	26	20%	8%	21.88	1.00	37.12	4.38	4.38	76.76
29	24	English	Yes	24	35%	2%	18.06	8.00	34.22	3.78	3.70	76.75
117	18-24	English	Yes	23.6	50%	0%	22.77	0.00	36.36	4.18	3.87	76.17
35	12-18	English	Yes	24	30%	15%	20.83	1.00	37.33	4.44	4.26	75.87
41	15	English	Yes	28	35%	88%	20.11	2.00	35.22	4.00	3.64	74.96
10	16-24	English	Yes	25	40%	0%	20.83	0.00	36.00	4.17	3.68	74.68
15	21	English	Yes	24	35%	10%	23.44	0.00	33.75	3.75	3.54	74.48
38	21	English	Yes	24	42%	4%	21.88	0.00	35.12	3.81	3.71	73.52
90	10-13	English and Spanish	No	30	21%	45%	19.85	2.00	32.82	3.88	3.49	73.05
26	12	English	No	31.9	10%	90%	22.50	2.00	34.40	4.60	4.32	72.82
11	23	English	Yes	23	53%	5%	20.83	1.00	33.78	3.89	4.03	72.53
13	10	English and Spanish	Yes	27	20%	90%	19.64	1.00	33.14	4.71	4.49	71.99
53	16	English	Yes	26	31%	49%	22.14	2.00	28.86	3.43	3.30	71.73
51	12-24	English	Yes	24.1	50%	18%	21.25	1.00	33.20	3.50	3.55	71.50
30	24	English and German	No	29	29%	25%	21.43	1.00	31.19	3.86	3.21	70.68
18	12	English	Yes	26	40%	20%	20.83	0.00	30.00	3.67	4.09	70.59
100	12	English	Yes	24	30%	20%	20.98	1.00	31.29	3.75	3.62	69.64
168	24	English and French	Yes	20	40%	20%	20.83	1.00	28.33	2.83	3.36	68.36
60	8	Dutch (main), French English, Spanish	Yes	23	22%	3%	18.75	0.00	30.75	3.25	2.82	63.57
41	18	English	No	20.8	55%	5%	16.07	4.00	28.86	3.43	2.72	63.08
25	12	English	Yes	25.5	16%	98%	19.79	4.00	27.33	3.33	3.41	62.87
88	10-19	French	Yes	22	25%	8%	19.44	0.00	28.44	3.56	3.41	61.86



NORTH AMERICA | US SCHOOLS STILL LEADING THE WAY

SportBusiness International asked the providers of the top three ranking postgraduate courses in North America about the secrets of their success



1. OHIO UNIVERSITY Master of Sports Administration

Norm O'Reilly – chair, department of sports administration

Greg Sullivan – director, PMSA programme

What keeps Ohio at number one in the rankings year after year?

O'Reilly: It's a combination of history and our current strategy. First of all, we're very fortunate in that we're the oldest [postgraduate sports management] programme in the world. We've been around for 52 years and have over 5,000 alumni from our graduate and undergraduate programmes working in the sport industry around the world. So we've got an enormous and very devoted alumni network and history.

More importantly, in the past five years we've really focused on improving the quality of our faculty and really driving our curriculum to be a business curriculum within the programme, so we've been

through a number of curriculum changes and updates and we're now doing that on a very regular basis. The third thing we've done strategically is made a real effort to become more international. We've internationalised our faculty, we've been expanding our partnerships with the universities around the world – we have a number of those – and we've been really working to diversify our student body, so that the students in the programme are from all over the world. So it's an international composition in terms of the faculty focus and the students.

Sullivan: I think diversity is always at the forefront of what we're doing. Considering our impact on the sport industry, I think we've had strong diverse leadership in the programme and I think that that's translated into our diversity success.

We have a history of success that attracts great students. I think that first and foremost our students really drive our success. They're engaged, they're motivated, and they serve to motivate the faculty and staff as well. There has been a long-standing culture of Bobcats taking care of Bobcats. And the understanding is that once you become a Bobcat, you're a part of the success of other Bobcats. It's really an amazing and wonderful culture that's been over 50 years in the making.

What challenges do you face?

O'Reilly: In terms of maintaining our ranking, it's simply competition. Every week we read about another programme popping up and getting going. A number of major business schools in the United States, Europe, Australia and Asia are launching programmes. And they're like us: they're really good business schools, they've got great curricula, they've got resources. Competition is the number one thing.

The challenge for the industry overall with all these programmes is, are there jobs for everybody? There are programmes where students aren't getting 100 per cent job placement, and that's a big challenge. We need to make sure we're aligned with how many job opportunities there actually are.

One thing we've been able to do which has been a challenge for all programmes economically is keep our MSA programme very small. We have about 20 students on the programme, and we've kept the number there despite a lot of pressure and a lot of demand. We know that it could be a lot bigger but we've kept it focused and kept it elite. It's really hard to get in and we know we have really talented students. Then they do very well in terms of their careers afterwards.

Ohio received a perfect score for graduate employment.

Why are Ohio alumni so appealing to employers?

O'Reilly: By keeping it so competitive to get in, the group that comes in is extraordinary to begin with. We get an exceptional pool of candidates that come through that want to join the programme. Then the curriculum is very focused on fitting with the industry needs around analytics, around high-end sales, around digital content. And then because it's a small group and a talented group and we have the faculty and our Center for Sports Administration, which is very strong, we have a very focused effort on supporting their job-hunting efforts once they're in the programme.

The other thing I think is key is that we're a two-year programme and the first year is an MBA. So we have a good chunk of time with the students and they also have an MBA degree. That just vastly increases your employability. They've got work experience, they're brilliant when they come in, they've got an MBA plus an MSA from a really good curriculum. All those things have led to the 100 per cent job placement and great salaries for as long as I've been here.

Sullivan: From an academic standpoint I think we understand the role that analytics is having and will have on decision-making. We just hired a new faculty member and she specialises in analytics, so we're really excited for what she brings to our course development. And from a leadership standpoint, we create an understanding of employee wellbeing as well as leadership wellbeing and the importance of a positive leadership approach which incorporates a strong focus on ethics which I think is really important. ○



2. UNIVERSITY OF MASSACHUSETTS AMHERST
Mark H. McCormack Department of Sport Management – MBA/MS Sport Management

Steve McKelvey – associate professor, associate department chair & graduate programme director

What are the hallmarks of the UMass programme?

We're very experiential learning-based. Our professors lecture and we do provide the theory, but most

of our grad classes also incorporate a real-world, hands-on learning component. I think our focus is general sport management and development of leaders in the industry.

We have areas where we are historically very strong – college athletics is one, front office of major sports is another very strong area, and we're also getting stronger with each year in the sports sponsorship consulting area.

But you come to our programme to get the finest overall sport management training and education. We're not focused purely on one thing or the other.

Where do you end up placing most of your graduates?

The reality is, in this day and age, that most of our alums are going to end up bouncing in and out of different industries. Not too many students start in college athletics and will be in college athletics for the rest of their lives.

They may start there, and they may go on the brand side, and they may go work for a pro sports team, a sports marketing company, and then they'll be back in college athletics. One of the first things we tell students in the professional development seminar is that their path is not going to be linear.

It's going to bounce around, in and out of different industry sectors. So we're preparing them for a bit of all of that. ○



3. GEORGE WASHINGTON UNIVERSITY
MBA in Sport Management

Lisa Delpy Neirotti – director, sport management programmes

Why do you think GWU graduates are so successful at finding work after the programme?

We've tried to build a whole in-classroom and out-of-classroom experience. We have more internships and opportunities to work outside than we have students. We work hard

to understand what our students want and then place them in good positions. I think it's that personal touch. We look for the traditional but often the new opportunities as well. From the time they enter our programme we work with them on getting them experience. Because it's not only academic achievement, but have they had relevant experience? And do they have a network? So we try to get them that experience, and introduce them to as many industry professionals as possible. We also work closely with them on interviewing skills, resume preparation – just becoming a professional.

What are the challenges you face?

Getting the students placed will remain our main challenge. There are limited positions and so many people going after them. Students these days are used to short-form tweets, or watching videos, and not paying attention to detail. So we really work on our students to go that extra mile and make that extra effort to not take a shortcut. I think that's important. We also have to make sure students understand there are so many other opportunities than just, they come in wanting to work only in football and only work in Washington DC. We have to say, 'look, you can work anywhere in the world and it may not be in that specific field you want to work in, but go try something different and then come back and see where your skills can take you'. It's about getting people to open their eyes to other opportunities. ○



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*SportBusiness International Postgraduate Rankings 2018; average salary three years after graduation.



TOP 15 NORTH AMERICAN COURSES

RANK	COURSE PROVIDER	COURSE	CLASS SIZE (2014/15)	COURSE DURATION (months)	WORK PLACE-MENT	FEMALE STUDENTS (%)	FOREIGN STUDENTS (%)	EMPLOY-MENT (at 6 mnths)	COURSE LEADER SCORE	STUDENT SATIS-FACTION SCORE	VALUE SCORE	USEFUL-NESS SCORE	TOTAL SCORE
1	Ohio University	Master of Sports Administration	27	22	Yes	43%	14%	25.00	10.00	38.89	4.56	4.22	92.66
2	University of Massachusetts	MBA/MS in Sport Management MS in Sport Management	25	12-21	Yes	27%	23%	23.33	9.00	37.58	4.46	4.06	88.44
3	George Washington University	Master of Science in Sports Management	18	15-24	Yes	40%	30%	25.00	3.00	38.67	4.78	4.57	88.01
4	University of South Florida	MBA/MS in Sport & Entertainment Management	27	21	Yes	60%	12%	24.48	4.00	38.25	4.29	4.28	85.30
5	University of South Carolina	Master of Sport and Entertainment Management	50	12-15	Yes	46%	16%	23.96	3.00	35.83	4.50	4.29	81.58
6	San Diego State University	Sports MBA	25	18	Yes	29%	21%	21.53	1.00	39.00	4.56	4.64	80.73
7	University of Central Florida	Master of Sport Business Management	26	17	Yes	48%	12%	22.92	2.00	37.00	3.67	3.78	79.37
8	University of San Francisco	Master in Sport Management	101	23	Yes	39%	12%	22.77	1.00	37.18	4.16	4.06	79.17
9	University of Oregon	MBA Sports Business	21	18	Yes	27%	23%	19.64	6.00	35.00	3.79	3.99	78.42
10	Ohio State University	Master of Science in Kinesiology Sport Management	14	12-24	Yes	43%	7%	25.00	2.00	34.18	4.18	3.64	78.01
11	Virginia Commonwealth University Center for Sport Leadership	MEd/MBA Sport Leadership	54	12-18	Yes	22%	7%	23.08	1.00	38.07	4.27	4.27	77.69
12	Columbia University	MS Sports Management	60	12-16	Yes	33%	30%	21.88	3.00	35.00	4.00	3.78	77.65
13	University of Louisville	MS in Sport Administration	23	18-24	No	61%	7%	25.00	1.00	35.11	4.00	3.88	76.99
14	Temple University	MS in Sport Business	29	24	Yes	35%	2%	18.06	8.00	34.22	3.78	3.70	76.75
15	Georgia State University	Master of Science in Sports Management	117	18-24	Yes	50%	0%	22.77	0.00	36.36	4.18	3.87	76.17



EUROPE | EUROPEAN UNIVERSITIES CONTINUE TO INNOVATE AND INSPIRE

SportBusiness International asked leaders representing Europe's top three courses about how they are staying ahead of their rivals from across the continent



1. THE INTERNATIONAL CENTRE FOR SPORT STUDIES (CIES)

Fifa Master

Kevin Tallec Marston – academic projects manager & research fellow in history

Alessandro Pellicciotta – head of marketing and development

How have you maintained your position as number one in Europe?

Tallec Marston: We have continued to focus on our strengths. We know what our identity is, we know that we're a leader in the international sector. We work with strong university partners, we have an excellent and continually growing relationship with our alumni network, which is a fundamental pillar of any course that wants to last more than a few years. And I would say the most important thing is we try to challenge ourselves every year to rethink what we do and to change the paradigm and maybe ask difficult questions about how we

can improve, because no one else is going to push us more than we can push ourselves.

What are some of those ways you've pushed yourselves?

Tallec Marston: One is the constant evolving curriculum. For a course to continue to attract the best people and to continue to provide the best education, we need to be sure that we are offering the most relevant topics, that we're teaching them with the best methods and with the best people. That's something where we have an internal review system every year based on the current student feedback and discussion with our professors. We are going to be introducing two or three new topics and modules in the coming two years, that are going to shift the focus a little bit on to some key new questions, whether governance and ethics, development and human rights questions, equality and inclusion, for example. We're trying to add a module on new media and another on CSR/Sustainability. We also have tuned our content to the global sports world, to be less Euro-centric. It's just about keeping up with the times and providing the best content.

What kinds of sectors do your graduates end up in?

Tallec Marston: The main focus is the international sports sector, its organisations and events. Federations – Fifa being one of them but not

the only one. International events – we will have many people working in Russia on the World Cup this year. We had a number of people at Pyeongchang [on the Winter Olympic Games], not just for the IOC but for various sponsors, agencies, for the LOCOG.

We then have a second set of graduates who work at the national level, but generally connected to international sports – so people who work in a national federation, club, league, government/sport ministry – meaning they're constantly working on international relations or international development programmes.

You rank very highly for graduate employment. What makes your alumni so employable?

Pellicciotta: We have strengthened a lot in this area. We give increased importance to supporting internships and jobs, particularly with national and international federations and across the sports world. It is important for our students to be on the market and be visible. The most important change in the last year has been our close support and collaboration with iWorkInSport, a job fair which finally creates a market for recruiters in sport and courses from all over who seek to get students professional opportunities.

What are the challenges facing the sector?

Tallec Marston: Undoubtedly the biggest one is the growth of the general sports management higher education sector. The number of courses continues to grow and that market continues to be saturated with supply of courses. That means the programmes that want to be successful and draw the best students really must be top in all areas, whether it's student experience, recruitment, content, work placement, alumni or industry connections. Our professional reputation has to be that we're the best, that's what we all work for, that's why we're here.

I would also say there is, just from a global political and economic perspective, a massive challenge in this area for funding. Not for courses, per se, but for students and scholarships. That's something we've tried to address as best as we can with our limited resources, but we have seen a trend over the last six years that the number of people applying for our course who ask for a scholarship has just gone through the roof. About 60 per cent of candidates apply for some form of financial aid. And that is directly connected with the global economic crisis of ten years ago and the fact that doing this kind of thing remains a challenge. We do not want our course to be a privilege. We want this to be merit-based, with the best people.

A bigger-picture challenge is the relationship that sports management education has with the sports industry sector. The sports sector is under so much scrutiny from a transparency point of view, a governance point of view, and we need to be seen as the leaders in changing that. That's one of our missions – to put out into the industry people who have a certain level of ethics, a certain standard of what it means to apply good governance, and that it's not just about signing the best, biggest, most lucrative contract you can get at any cost. ○



2. RUSSIAN INTERNATIONAL OLYMPIC UNIVERSITY
Master of Sport Administration
Nikolay Peshin – pro-rector

The Russian International Olympic University is well established in the industry: how are you responding to new trends and developing the programme?

We have been intensively developing the RIOU educational programs integrating modern trends.

The sports industry is increasingly engaging local communities, states and big business, mostly through organising sporting events. Online communities and new technologies have become an essential element of the modern sports audience ecosystem and do strengthen and impact the fan experience.

Social media and diverse digital platforms have created new marketing opportunities for interacting with global fans and attracting new sponsors.

The growing esports and extreme sports market sectors look game-changing and we have responded to this challenge by inviting cyber sports experts to lecture at our campus, including start-up representatives and sport innovators.

What are the challenges you're anticipating?

We've been analysing the global challenges facing big sports and adequately transforming our educational strategies. For practical assignments, RIOU students often take advantage of the superb post-Olympic infrastructure.

However, as the rising cost of mega-events is a risk, we anticipate a growing significance of inter-regional cooperation, with new centres of sport business arising in Asia-Pacific.

Another challenge is the operations impact of the digital marketing tools for selling sport-related products and services, as new esports emerge and start ruling the roost on the market. ○



3. CENTRO DE FORMACIÓN FUNDACIÓ VALENCIA CF - ESBS EUROPEAN SPORT BUSINESS SCHOOL
Master in International Sports Management
Jorge Coll – director

The Master in International Sports Management has risen to third in Europe in our rankings. What are the main factors in your success?

We think the growth is due mainly to the level of our students who, with their work, effort and dedication, make us grow together. In the same way, it is because of the performance and continuous improvement of our professors and academic team, composed entirely of sports industry professionals.

One of the most valuable aspects is being part of an elite Spanish football club. Students can interact right from the start with the sports industry from several areas, starting with the classrooms located in the same facilities as [La Liga side] Valencia CF. Also, the fact that most of the club's area directors lecture in the program.

What challenges are you looking forward to?

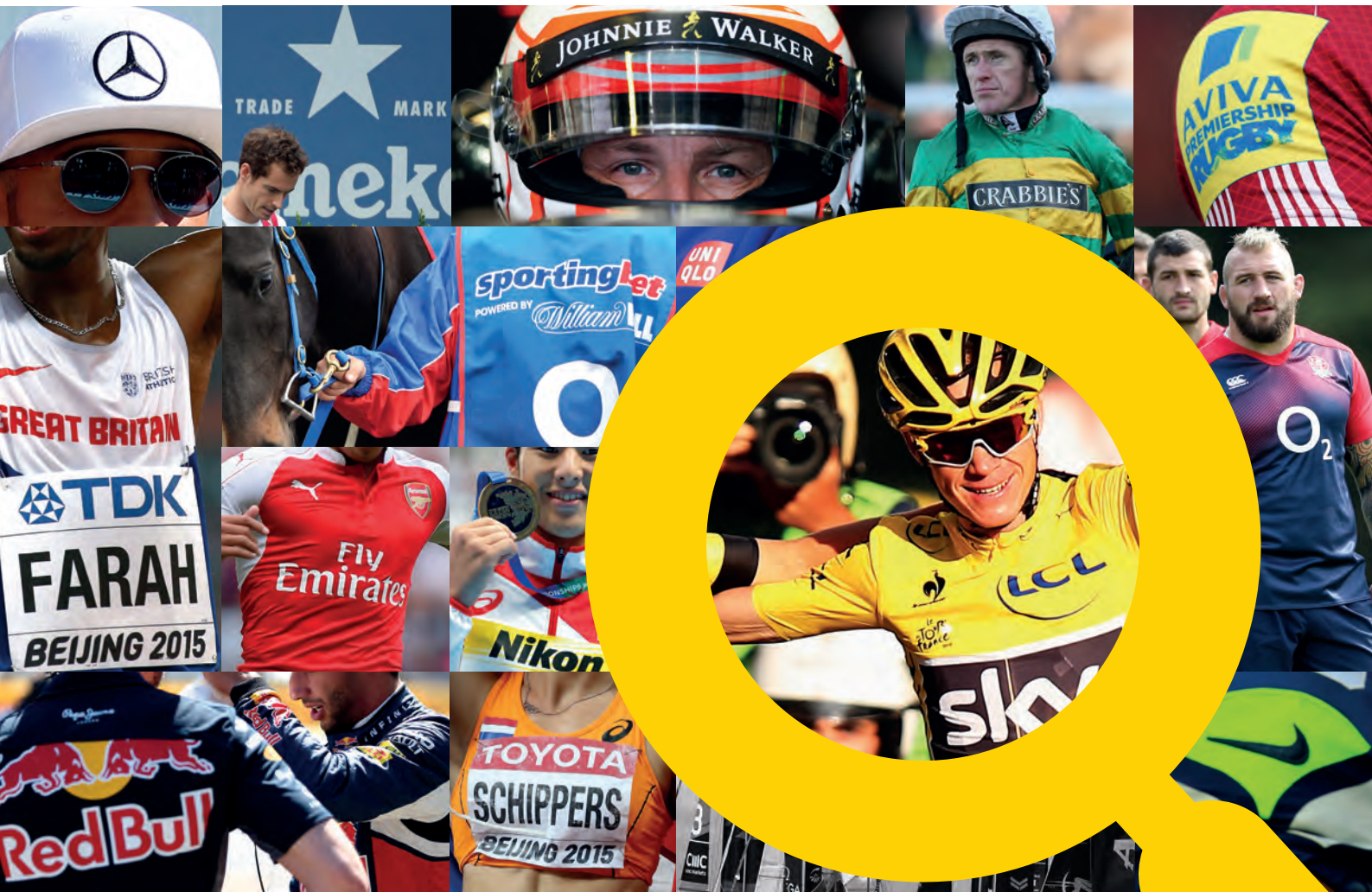
The great challenge is innovation and the ability to adapt quickly to the transformations in the sports industry; having students who receive the know-how in a practical way and providing them with knowledge and key skills for their professional performance. This facilitates better access to employment, and we think it contributes to the improvement, growth and professionalisation of the industry.

We want our students to receive the knowledge of what the industry needs from them. That's why our professors, like the advisory and academic committee, offer a practical point of view from their own experience. With each edition we carry out a process of continuous improvement that we hope leads us to higher quality and to better cover the demands of professionals in sports management. ○

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TOP 15 EUROPEAN COURSES

RANK	COURSE PROVIDER	COURSE	CLASS SIZE (2014/15)	COURSE DURATION (months)	LANGUAGES	WORK PLACE-MENT	FEMALE STUDENTS (%)	FOREIGN STUDENTS (%)	EMPLOY-MENT (at 6 mnths)	COURSE LEADER SCORE	STUDENT SATIS-FACTION SCORE	VALUE SCORE	USEFUL-NESS SCORE	TOTAL SCORE
1	The International Centre for Sport Studies (CIES)	The Fifa Master	31	10	English and French	Yes	28%	81%	23.44	5.00	37.38	4.69	4.55	84.05
2	Russian International Olympic University	Master of Sport Administration	55	10	English and Russian	Yes	38%	39%	21.88	1.00	34.50	3.67	3.61	78.65
3	Centro de Formación Fundación Valencia CF	Master in International Sports Management	18	9	Spanish	Yes	22%	44%	22.22	0.00	36.20	4.40	4.44	78.26
4	Sheffield Hallam University	MSc Sport Business Management	30	12	English	Yes	20%	46%	20.31	1.00	37.00	4.25	4.12	77.68
5	University of Parma - University of Republic of San Marino	International Master in Strategic Management of Sports Organisations, Events and Facilities	20	12	English and Italian	Yes	20%	8%	21.88	1.00	37.13	4.38	4.38	76.76
6	AISTS	Master of Advanced Studies in Sport Administration and Technology	41	15	English	Yes	35%	88%	20.11	2.00	35.22	4.00	3.64	74.96
7	Johan Cruyff Institute	Master in Sport Management	90	10-13	English and Spanish	No	21%	45%	19.85	2.00	32.82	3.88	3.49	73.05
8	University of Liverpool Management School	MBA Football Industries	26	12	English	No	10%	90%	22.50	2.00	34.40	4.60	4.32	72.82
9	Real Madrid Graduate University	MBA Sport Management	13	10	English and Spanish	Yes	20%	90%	19.64	1.00	33.14	4.71	4.49	71.99
10	University of Bayreuth	MBA Sport Management	30	24	English and German	No	29%	25%	21.43	1.00	31.19	3.86	3.21	70.68
11	AMOS	Master of Business in Sport	168	24	English and French	Yes	40%	20%	20.83	1.00	28.33	2.83	3.36	68.36
12	Vrije Universiteit Brussel	Postgraduate Course Sports Management	60	8	Dutch (main) French, English, Spanish	Yes	22%	3%	18.75	0.00	30.75	3.25	2.82	63.57
13	Coventry University	MSc Sport Management	25	12	English	Yes	16%	98%	19.79	4.00	27.33	3.33	3.41	62.87
14	MBA ESG	MBA in Sport management	88	10-19	French	Yes	25%	8%	19.44	0.00	28.44	3.56	3.41	61.86
15	University College Dublin	MSc in Sports Management	23	12	English	No	34%	32%	17.31	0.00	29.38	3.31	3.59	61.59

Master of Science in Sport Management Program launched

The sports industry in the United States is estimated to be worth almost \$500bn; worldwide, it's worth approximately \$1.5tn.

To prepare graduates for successful careers in this important and challenging field, The George Washington University School of Business has recently launched the Master of Science in Sport Management program.

While the specialized master's program is new, the GWSB has been a leader in sport management education for more than 25 years. GWSB students have long been able to earn a BBA or MBA degree with a concentration in sport management (as well as a sport philanthropy executive certificate). GWSB's excellent sport management courses now form the core of a degree-level graduate program.

The school's sport management courses are well regarded throughout academia and the sports industry. *SportBusiness International* this year ranked GWSB third in the world for sport management education. Building on the foundation of its existing sport management courses – and the expertise and experience of its faculty – GWSB has put together a master of science program dedicated to the special knowledge and skills required for a career in sport management.

In addition to an in-depth classroom curriculum, GWSB's sport management master's students learn through hands-on study in the field. The program has long featured study-abroad courses centering on the Summer and Winter Olympic Games and the FIFA World Cup, where students conduct research on behalf of organizers, sponsors and participants, and gain an insider's understanding of the international sporting events. Off-campus study opportunities also recently have taken GW students to China to learn about



MLB marketing efforts, to Oregon for a course on the athletic apparel and footwear industries, and to California for a course on corporate social responsibility in action sports.


Lisa Delpy Neirotti, associate professor of sport management and director of GWSB's sport management program, has been taking classes to the Olympics since the 1992 Barcelona Games. "I want the students to have a love of and appreciation for the Olympic movement. I also want our students to be efficient managers," Dr. Neirotti said.

Dr. Delpy Neirotti and Professor Mark Hyman, an award-winning business of sports journalist and author, are full-time faculty in the sport management program. Beyond teaching, they are mentors and advocates for GW students.

GWSB's graduate-level sport management program also provides students with unmatched industry

access through the annual TEAMS (Travel Events and Management in Sports) conference, the first and largest event of its kind, and the SINC, (Sports Industry Networking and Career Conference), which regularly draws hundreds of top executives and recruiters from all facets of the sports industry. The program also partners with the local MLB franchise through the Washington Nationals Executive Trainee Program.

That access is a proven difference-maker for GWSB sport management graduates – more than 500 have landed positions with professional sports teams, major leagues, national and international sports governing bodies, sports manufacturers and sports broadcasting and media companies.

To learn more about the GWSB Master of Science in Sport Management program please visit www.gwu.edu 



BREAKING NEW GROUND | UNIVERSITY OF SOUTH FLORIDA

Despite only taking its first cohort of postgraduate students in 2012, the University of South Florida's MBA/MS in sport and entertainment has risen to fourth place in our rankings this year. William Sutton, the founding director of the programme, offers Adam Nelson an insight into the factors behind the rapid rise



The USF Vinik Sport & Entertainment Management class of 2019 visit Marlins Park in Miami

The University of South Florida began offering its Vinik Sport and Entertainment Management Program MBA in 2012, the year the these rankings were first published. After making its debut on the list at number 19 last year, it has risen rapidly up the rankings, finding itself in fourth place in 2018, behind only the heavyweights of George Washington, UMass, and perennial winner Ohio.

This remarkable rise has been supported by strong showings in the value and usefulness criteria – new categories in this year's list – and top-ten finishes in both the graduate and course leaders' choice, suggesting that the course's graduates have been sufficiently impressed, as have the faculties of rival schools.

William Sutton, the founding director of the programme at USF, believes there is another, more tangible factor in the college's early success. "I think we embraced our location," Sutton explains to *SportBusiness*

International. "We realised that in Tampa we have the ability to do things that you can't do in other markets. We wanted to make sure that we integrated all those things into our programmes."

Sutton reels off a list of the sporting events that have been held in the city since the inception of the MBA – "the NCAA Women's Final Four, the Men's Frozen Four, the college football championship" – and says that he and his faculty "want to incorporate all those things into opportunities for our students. So we really invest a great deal of time and effort into experiential learning. We want to make sure that our students are able to learn the theory, see it in practice, and apply it themselves."

The programme was initiated by the Vinik family, owners of the nearby Tampa Bay Lightning of the National Hockey League. Sutton explains that the Viniks' thought process was that "they would like to have MBA students learning the most advanced

areas of the business and bringing that knowledge to the Lightning, and then being at the Lightning and seeing the issues that the team faced and being able to work on those problems". In 2017, Jeff Vinik stepped up his commitment to the course, giving his name to the programme and rechristening it as the Vinik Sport and Entertainment Management Program.

The development of the programme has followed that foundation, operating in the belief that experience is the best form of learning, with all students simultaneously working on placement and studying throughout the second year of the course. Due to the nature of the partnership with the Lightning, everyone enrolled on the programme gets an internship, a stipend, a tuition-fee waiver and medical insurance for the duration of their final year – another factor which makes the MBA one of the most sought-after in the country. "It's not a few people benefiting, it's everyone benefiting,"

Continued from previous page...

says Sutton. “In the first year, everybody pays, in the second year, they’re working and the programme develops this way.”

The sport industry component is introduced during the second semester of the first year, with most of the first year following a standard MBA programme because, Sutton explains, “we want our students to have the same business foundation that every MBA student would have, so they’re integrated with other MBA students. We really start integrating sports in the second year, when the internships and residencies begin”.

A global perspective

The opportunities presented by the internship placements are diverse, says Sutton, reflecting the college’s desire to offer a comprehensive business education of the sports industry and not focus too closely on any one area. “No matter what you’re interested in we have an opportunity for you,” he says. “There are ten places at the Lightning, there’s [MLB team] the Rays, the [NFL’s] Tampa Bay Buccaneers, there’s the Sports Commission, there’s University of Central Florida Athletics, there’s the Hard Rock Casino. The residencies are in sales, sponsorship activation, event management, customer analytics, marketing. It’s very diverse. And we try and do that. I don’t want to have 20 kids here looking for the same job. We make sure we have a diverse student body looking at different things.”

Another major point of differentiation, Sutton says, is the international trip to experience a different sports industry and culture. In 2017 the class went to London, an excursion set to be repeated in the coming years. Sutton identified the lack of understanding of the global sports market as a “key weakness” of the programme, so took the decision to take each class on an international trip each fall.

The inaugural journey to London saw students visit the UK offices of global sports and entertainment marketing company Octagon, receive a presentation from IBM as part of the computing giant’s partnership with Wimbledon, and partake in an academic conference at the University of Worcester. More than anything else though, Sutton says, the hope is to introduce students to “the passion and history of the English Premier League”. In 2017, he took the class to visit Crystal Palace; in 2018, they will spend time at Premier League champions Manchester City.

“I think understanding the way football

“Over the six years of the programme we’ve done, 98 per cent of our grads have got jobs in the sports industry within three months of graduation.”

BILL SUTTON, FOUNDING DIRECTOR,
VINIK SPORT AND ENTERTAINMENT
MANAGEMENT PROGRAM MBA

works in the UK and Europe is crucial to understanding how the sport industry is different over there,” says Sutton. “It’s in the generational support of the EPL. It was your great-grandfather’s team, your grandfather’s team, you father’s team... I think that relationship is less commercial than the US in that you have an obligation to these generations of fans”.

Unlike the US, where fans are almost resigned to being at the mercy of franchise owners, changes to pricing or anything else in the UK “have to be well thought-out and well presented to the people, and you have to honour this trust,” Sutton adds. “I also want them to see that US sports are very over-commercialised. They take longer to play and they don’t have any flow. Whereas if you go to a game in Europe the sport has flow, because it’s not over-commercialised. So when you look at the numbers that they pay for the kit, that number’s as high as it because there’s not all these other things going on that sponsors have an opportunity to be associated with. These are the things I need my students to understand.”

There is also a domestic trip to Los

Angeles, which involves a visit to esports giant Riot Games – something else which helps the course stand apart from rivals. “The programme is sports and entertainment, and I think we need to keep that in mind at all times,” says Sutton. “I need my students to know and understand how esports is growing and how that’s coming along, because it’s crucial to understanding the modern sports market.”

This global commercial education is certainly a factor in alumni’s high rating of the course, Sutton believes, and is also a contributing factor to what he calls the programme’s “biggest differentiation point”, post-graduation placement.

“Over the six years of the programme we’ve done, 98 per cent of our grads have got jobs in the sports industry within three months of graduation,” says Sutton. “That sets us apart, I don’t think anyone can touch that.” Indeed, over the six-month employment measurement used in the SportBusiness Postgraduate Rankings, only five schools rank higher than USF.

“We have all these opportunities, and so our students have a variety of options to pick from and by the time they leave here they have two years’ work experience,” says Sutton. “We have students going to work at the Dallas Cowboys, the Miami Heat, the Miami Dolphins, the Tampa Bay Lightning, the Cavaliers, Lead Dog, Bespoke, a variety of things all over the country.

“It’s exciting and it’s fun for us to see the students succeed and then it’s a motivational thing for the first-year students to see what’s happened to their colleagues a year ahead of them. It helps motivate them and keep them excited about what’s going to go on.”



The sports MBA at USF has quickly built a strong reputation



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GUARANTEED SATISFACTION | SAN DIEGO STATE UNIVERSITY

San Diego State University's Sports MBA has come out on top of the student satisfaction ranking, with a winning showing in both the graduate choice and course usefulness criteria. Scott Minto, director of the programme, tells Adam Nelson why the course is so popular with its students



San Diego State University came out top of our student satisfaction rankings

There are many measures of a university course's success. One of the most surefire ways to know if a programme is working, however, is to ask those who have come through it. By this criterion, San Diego State University's Sports MBA has had a wildly successful showing in the 2018 SportBusiness Postgraduate Rankings.

As well as coming out top of our student satisfaction ranking, the course was also voted the most useful, and topped the graduate choice measurement. Scott Minto, the director of the programme, believes the reason for this success is quite simple: "We've always had a focus on the student experience, and I think that that translates and resonates well."

Minto believes the background of many of the students has helped the university's cause in this regard, as "most of them come from a non-sports-business background" and

"Everything we do has the student experience in mind"

SCOTT MINTO
DIRECTOR OF THE SDSU SPORTS MBA

are there in the first place because "they're using the course to springboard into a new career". With a strong showing for graduates in employment after six months, the programme seems to be working.

"We acknowledge that transition, and build a foundation the entire time they're there with guest speakers, software training opportunities, site visits, field trips, really trying to enable that transition into a sport industry career", says Minto. "Everything we do has the student experience in mind and I think it just resonates into their careers. They tend to look back at our focus on their time during the programme with quite a bit of

respect and appreciation for where it helped lead them."

Two key pillars for SDSU are the exclusivity of the course, and the diversity of the classes, says Minto. "We're not just pumping students through the turnstiles and trying to get as many per year as we can," he says. "We carefully select people, we look for all types of diversity. That's something that I think our students respect quite a lot. We place heavy emphasis on having a diverse student body, I think that lends a lot of value to the experience overall. You're not surrounded by a bunch of people who are exactly like you and have the same values and background and you get to experience the programme with everyone together through all classes. You get a lot of time with the same people and those relationships are valued."

When asked to surmise the course, Minto says his first response is always "rigorous".



Mike Kitts of the Golden State Warriors (left) is an alumnus of the course

“I tell people it’s challenging,” he says. “When I travel to the Real Madrid Graduate School to teach the students about the US sports business, those students can’t believe it when I tell them my guys start at 8am, and that they’re expected to be dressed business casual every day, and business professional for presentations. We treat it like a board room in a sport business organisation or club. We look at every single day as an opportunity to learn more and challenge ourselves and I feel like that’s a little bit unique.”

Another distinguishing factor is the annual trip. “A lot of programmes will go to NYC or London, maybe Beijing,” Minto explains. “But we go to a developing country, a unique feature that I think really helps with student perspective of what they’re getting into in the industry as well as a tremendous bonding experience for the students.”

Academic first

Minto describes the course at SDSU as “academic-first”, in contrast with many other postgraduate sport management degrees which rely on high-profile guest speakers or other industry figures teaching alongside their full-time positions. “We have that as well, but we have that in addition to a really solid academic base, so I think people view it as they’re getting what they paid for in an MBA.”

When guest speakers are brought in, they tend to be alumni of the course, who can speak about their experiences in the industry but also about how the MBA programme has informed and helped their career. Minto gives the examples of Mike Kitts, director of partnership marketing at the Golden



SDSU Sports MBA students on a leadership exercise with active duty US Marines

“From the day that the students get here it’s all about getting a job, not just about getting through the courses and getting good grades”

SCOTT MINTO

DIRECTOR OF THE SDSU SPORTS MBA

State Warriors, and Jack Tipton, director of partnership sales at the Pittsburgh Penguins, as former students who have returned to pass on their wisdom.

“These guys are defending champs of their respective leagues, but when they come in, it’s not just ‘show us your ring’ and ‘tell us some stories about Steph Curry or Sydney Crosby’,” says Minto. “When we have them coming, I’ll tell my students, ‘this person’s coming in in a few weeks, here’s something they’re currently thinking about, so you guys put together a presentation for them’. So when they come in it’s not just career day, it’s: if you want to work in my part of the business, you need to learn Nielsen Scarborough software, you need to be good at this, you need to be good at that, so it’s constantly with the end goal in mind, it’s never a career day or all about the alumni.”

This reflects the way the entire course is structured around eventual employment within the industry, rather than just ticking the MBA boxes. “I think from the day that they get here it’s all about getting a job, it’s not just about getting through the courses and getting good grades,” says Minto. “That’s

all obviously necessary, but when we think about it, everything we do is aimed towards getting those students ready for that next phase.”

Diverse work placements

Part of that readying process, he explains, is ensuring students are keeping their ambitions realistic, and are in the right field for their skillset. “I don’t find a lot of value in humouring students who have these sometimes unattainable goals, so it’s all about, ‘let me tell you what might be a better path for you and let’s work together on how you could be really satisfied doing that’. We’re all about boots on the ground and figuring out what you can do for now, and I think some programmes miss that piece, where they’re just so concerned with getting students in the door and out the door.”

Thanks to this process of identifying the best roles for each student, the work placements that alumni find themselves in are spread out across the industry.

“We probably put as many people into data analytics roles as we put into partnerships sales roles... and event management roles, and community affairs and relations roles,” says Minto. “I would love to say that we specialise in one area, but we have found over the years that alumni go into so many diverse fields that we really don’t have any single path. There are some programmes that are really heavy on amateur athletics or collegiate athletics; that’s definitely not us.

“We’re all over the map, and I’m happy to be that way. It’s a lot more interesting, right?” ○



LEARNING ONLINE | A MODERN APPROACH TO HIGHER EDUCATION

High-speed internet connections and an increasingly tech-savvy student base are helping revolutionise the higher education sector, with more people now choosing courses with the flexibility to study from anywhere. Adam Nelson speaks with some of the course leaders who are pioneering a new style of distance learning

While distance learning has been around for a while, it is only recently that advances in technology have truly narrowed the gap between online and face-to-face courses. The quantity, quality and depth of sports-related undergraduate and graduate degrees offered via the internet has increased dramatically in the past few years.

The fact that our number one-ranked postgraduate sports management course in the world, at Ohio University, has been operating its own online programme for seven years is indicative of the way even top-end schools are seeking new and more flexible ways to reach their students.

Norm O'Reilly, chair of the department of sports administration at Ohio, says the course was established because "all the trends are towards mixed delivery". Since 2011, Ohio has offered a course which mixes online teaching with an in-person work placement residency programme. "It continues to grow in terms of student quality and strength," says O'Reilly.

The Johann Cruyff Institute operates one of Europe's biggest online sports MBA programmes and the course leader, Victor Jordan, believes the benefits to the online degree make it a hugely valuable alternative to in-person learning.

Due to the way the course is treated by the Institute, distance students get "even better attention" from their professors than those on campus, because of the university's commitment to respond to "every email, request or question within 24 hours," says Jordan. "Even those on campus don't have 24-hour attention!"

Back to school

One of the biggest drivers behind online learning has been the way it has allowed mid-career professionals – either from within the sport industry or outside it – to return to their education without disrupting their careers.

"The students in the class tend to be in their 30s, 40s, 50s – they're up-and-coming



professionals, mid-career professionals, senior leaders in their organisations and they're coming back to get better," says O'Reilly.

Jordan says the same is true at the Johann Cruyff Institute, noting that "92 per cent of our online students are working, and more than 60 per cent work in the industry."

There are, he says, two kinds of industry professionals who enrol in online classes at the school. "People who have five or six years in the industry and need to upgrade their position, and we also have senior people, sometimes coming from working in the sports industry who need to come back to school and understand what is happening, because sometimes they are just focused in one area and not understanding what is happening in the global market."

Lisa Delpy Neirotti, director of sport management programmes at George Washington University, concurs, explaining that students' "increasing desire for flexibility" has been the driving force behind her own school establishing an online component – although it is married to a rigorous work placement programme.

"We try to get them into work positions and internship positions and some of those are 40 hours a week, so they may not want to come to campus three or four days a week and it gives them the flexibility."

While the sports management degree at


GWU is not available exclusively online due to the constraints of the work-placement, the school does offer a full-time online MBA, which students can take with a sports focus, picking modules from the sport management course. "It's about having different options for students so that if they're not on campus or can't get here physically, they can still study with us," she explains.

Not all are convinced by the value in distance learning, however. Kevin Talleg Marston, academic projects manager at the International Centre for Sport Studies, says that he and his faculty "believe very strongly in face-to-face learning", and currently have no plans to introduce an online-only or majority online course.

"The nature of this course is really that it's building a community of people through a higher education degree, and doing that face-to-face is the only way," Marston explains. "We think its key to have everyone together, working on developing their professional relationships as well as their knowledge of the industry."

Jordan ultimately believes that online learning will form a part of all education in the future, even if the face-to-face component will remain invaluable. The trick is in getting the balance right and ensuring online learning is more than just students reading off a screen or watching a video, but actively engaging with their subject.

"I'm a 44-year-old guy, and in my generation we used to learn by reading and going to some place where a guy who knew more than us would give us information," says Jordan.

"Right now, we have the possibility to learn 24 hours a day, feeding students from different sources, and perhaps there are too many sources and we need more guidance in the way how we transfer this information into real projects, by getting students in work placements. This is a way where the student is not just listening but doing, and receiving feedback from a guy who is running a club, or who is managing a company." 

David Tang, Managing Director, China at City Football Group, and FIFA Master Alumnus

ADVERTISING FEATURE

The Chinese-Canadian Xigang (David) Tang, 46, has had an outstanding career in sports management, since graduating from the 3rd edition of the FIFA Master in Management, Law and Humanities of Sport, in 2003. He recalls: "Right after graduating from the FIFA Master, I joined the Asian Football Confederation as an intern, at their headquarters in Kuala Lumpur, Malaysia. After six months, I got a contract as a full-time employee for another year, covering various areas, such as marketing, competitions and football development".

Later on, David switched from the federation to the sponsor side. "I joined Nike China in 2005, and I spent the next decade with them on various football roles: sports marketing, brand marketing, sales, and eventually became the General Manager of Football at Nike China, in March 2016", he remembers. After ten years with the American corporation, he decided to, again, take a new challenge in his career. David left Nike and joined the City Football Group (CFG), as their Managing Director for China.

CFG owns and operates six professional clubs around the world, in different countries, with their flagship club being Manchester City FC - the current Premier League champions. Since joining the group, David oversaw the establishment of an office in Shanghai, recruited a team of local marketing and sales professionals, and basically started from scratch to develop the group's brand and business in the Chinese market.

In this interview, David Tang shares his views about the growth of the football market in China, the increase of the country's influence in the sport, and his memories from the programme which, according to him, "was one of the most important things I did in my life".

What are the City Football Group's main objectives in China?

We have three main objectives here in China: First, we need to grow our fan base, primarily for Manchester City. We want to deepen our engagement with the Chinese fans and consumers. We want to be one of the favourite foreign clubs by Chinese football consumers. That's our core objective. Second, we'd like to contribute to the football development and the growth of the game in China, especially in the

areas like coach education, youth training, and elite development. Finally, we want to achieve commercial growth and success in the long run, with sustainable approaches.

What would you say was the biggest achievement of your career so far?

My involvement into the Beijing 2008 Olympics! I enjoyed being part of Nike team serving the Chinese athletes, but also the national pride for that historical moment for our country! I still remember the night of August 8, 2008, when I was at the Bird's Nest, attending the opening ceremony of the Beijing Olympics, with tears in my eyes, and I was so proud of the hard work our team put into it, and also proud of our country's big step up onto the global stage.

How do you see the rise of China's impact on global football? What can we expect in the coming years?

Similar to the world's economy today, in world football, China is catching up. It will take years, but it will happen, and we are making positive changes and progress.

Are you still in touch with classmates or other alumni? How important is that network for you?

Yes, all the time. Digitally and in person. The FIFA Master network is one of the most valuable assets, workwise and in my personal life. As business network, it's priceless, but I also consider them my friends and even as my family.

What are your fondest memories of the FIFA Master?

So many of them. If I have to choose one, I'd say the trip to Rugby School, where the sport of rugby was invented. There, our class bought a rugby ball at their retail shop, and we decided that each classmate would hold on to the ball for a year, and then pass it to another classmate in person. The rugby relay will go on and on, for the rest of our lives. I need to find out who has that ball now, as I am keen to relay it. That binds our family together.



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TOP OF THE CLASS | ALL THE METRICS

Top 10: Average salary

RANK	COURSE PROVIDER	SALARY (\$)
1	Columbia University	100,111
2	The International Centre for Sport Studies (CIES)	89,929
3	AISTS	89,002
4	University of Oregon, Lundquist College of Business	82,115
5	Ohio University	80,888
6	San Diego State University	71,400
7	New York University Preston Robert Tisch Institute for Global Sport	69,894
8	Deakin University	68,565
9	University of San Francisco	65,319
10	University of Bayreuth	64,079

Top 10: Most useful/frequently used in current role

RANK	COURSE PROVIDER	USEFULNESS SCORE
1	San Diego State University	92.86
2	George Washington University	91.40
3	The International Centre for Sport Studies (CIES)	91.07
4	Real Madrid Graduate University	89.80
5	Centro de Formación Fundación Valencia CF	88.81
6	University of Parma - University of Republic of San Marino	87.65
7	University of Liverpool Management School	86.31
8	University of South Carolina	85.81
9	University of South Florida	85.66
10	Virginia Commonwealth University Center for Sport Leadership	85.44

Top 10: Graduates' Choice

RANK	COURSE PROVIDER	STUDENT SATISFACTION SCORE
1	San Diego State University	97.50
2	Ohio University	97.22
3	George Washington University	96.67
4	University of South Florida	95.63
5	Virginia Commonwealth University Center for Sport Leadership	95.18
6	University of Massachusetts Amherst	93.96
7	The International Centre for Sport Studies (CIES)	93.44
8	University of New Haven	93.33
9	University of San Francisco	92.95
10	University of Parma - University of Republic of San Marino	92.81

Top 10: Most valuable in furthering career

RANK	COURSE PROVIDER	VALUE SCORE
1	George Washington University	95.56
2	Real Madrid Graduate University	94.29
3	The International Centre for Sport Studies (CIES)	93.75
4	University of Liverpool Management School	92.00
5=	San Diego State University	91.11
5=	Ohio University	91.11
7	University of South Carolina	90.00
8	University of Massachusetts Amherst	89.17
9	University of New Haven	88.89
10	Centro de Formación Fundación Valencia CF	88.00

Top 10: Course leaders' choice

RANK	COURSE PROVIDER
1	Ohio University
2	University of Massachusetts Amherst, Mark H. McCormack Department of Sport Management
3	Temple University
4	Deakin University
5	University of Oregon, Lundquist College of Business, Warsaw Sports Marketing Center
6	The International Centre for Sport Studies (CIES)
7	University of South Florida
8	Texas A&M University
9	Coventry University
10=	University of South Carolina, Loughborough University, Griffith University



A global network at the heart of sport

Since being founded in 2000 by the IOC and leading academic institutes, the International Academy of Sports Science and Technology (AISTS) has provided the launch pad for many successful careers in sports

In addition to an academic programme developed and delivered by people at the heart of sport, AISTS prides itself on its connectivity. Today its alumni of more than 500 former students hold key positions in sports worldwide.

SportBusiness spoke to former international sailor Marion Gebistorf about her experience at AISTS and the way it has helped shape her career.



Marion Gebistorf, AISTS alumna, class of 2008

What is your current role and what are your responsibilities?

As Commercial Operations Manager at UEFA, I have a number of responsibilities at the heart of the broadcast operations around UEFA matches. I am in charge of broadcast management for Europa League matches and work as a broadcast manager on Champions League matches. In both cases, my role focuses on ensuring that rights-holding broadcasters operate and deliver as per their agreements, and that they receive the services, access and exclusivity they bid for.

I also work on the Champions League Final. My roles are both fascinating and central to the operation. It's my responsibility to ensure broadcasters get the access they need to deliver coverage which reflects the quality of the competitions and meets UEFA standards.

I have been in the role for almost seven years now and it is fascinating to be at the heart of the broadcast and commercial operations. Before joining UEFA, I spent two years at Team Marketing, having previously spent a season with FIS, the International Ski Federation.

How did AISTS equip you for your role?

Ever since High School I knew I wanted to work in events. After studying Sports

Science in Australia, I looked for a course that would give me the depth of practical knowledge and experience which would equip me for that.

AISTS certainly delivered. The course gave me an amazing overview of the sports world and what it's all about. It puts you on the inside and makes you aware of the range of different jobs that are out there, and the skills needed to do them.

The fact that it is based in Lausanne, the home of so many Federations and other sports bodies, also meant that we felt at the heart of sport, with great access to connections to these organisations and the people who work for them.

What were the highlights of your time with AISTS?

There were many and it is not really possible to pick out a handful, but what made it special was the quality and depth of the lectures and the balance between time spent in the classroom, doing projects and working on placement – I was at FIS as an intern. That all helps you get a very rounded experience.

Lectures were delivered by people from inside the business who were able

to share their real-life experience and provide the sort of information you just couldn't look up.

The other key thing was the international perspective gained from studying alongside people from all walks of life and from all around the world. People from all sorts of backgrounds are attracted by sport, and that was represented on the course.


Over the years the AISTS alumni has become huge and is spread out around the world. It's a fantastic global network which I'm very glad to be part of.

It has certainly helped me at UEFA where we work with a lot of specialist freelancers, and the contacts with the AISTS alumni are invaluable in identifying the best people to work with.

AISTS has earned a great reputation across sport, so students graduating with a qualification which is respected benefit greatly from that reputation.

With the benefit of experience, what advice would you give to young people either considering a career in sport or advancing their careers?

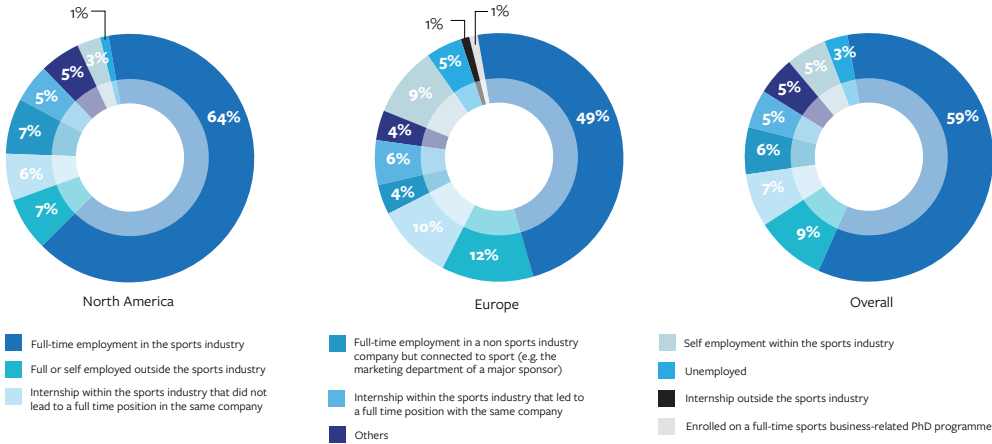
The key is not to be too focused on one type of work. Studying at AISTS opened my eyes to the breadth of roles that are out there and the chance to discover new worlds. It also taught me not to be too fixated on one particular sport or on working for one of the bigger sports bodies – there are generally more opportunities to get hands-on experience in many different areas working with a smaller organisation.

It's also a very competitive business. AISTS helps put you on the fast-track and not only opens doors to many opportunities, but gives you a truly international network of contacts which will help you in whatever role you take up. 

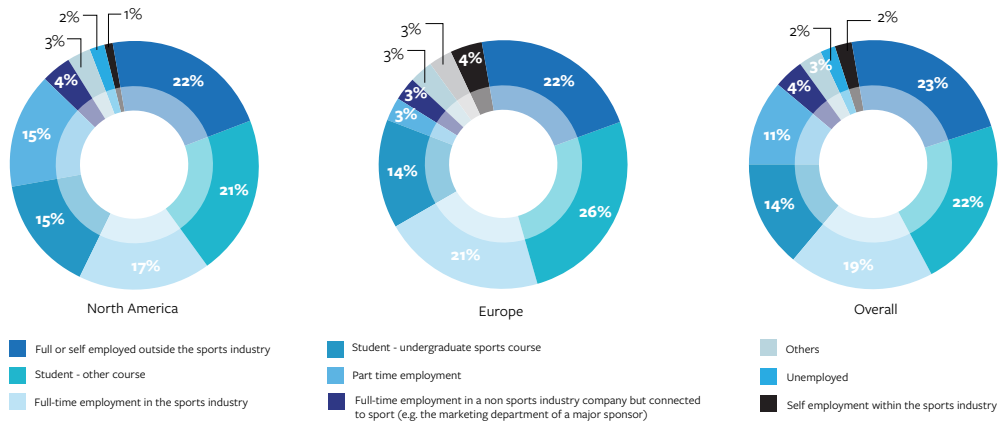


CAREER PROSPECTS | SPORTS MASTERS GRADUATES

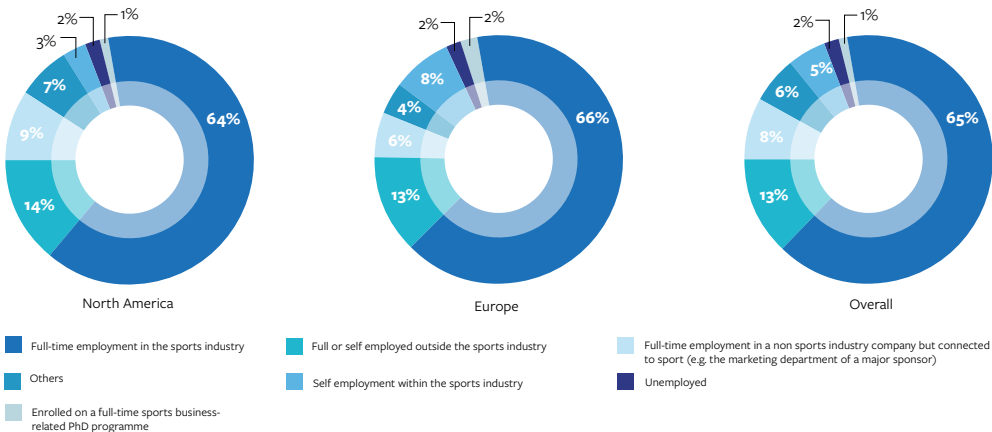
EMPLOYMENT STATUS SIX MONTHS AFTER GRADUATION



EMPLOYMENT STATUS BEFORE BEGINNING COURSE



RESPONDENTS CURRENT EMPLOYMENT STATUS



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