

## FOOTBALL

# Boos, cheers and indifference – broadcasters on the winter World Cup

By Kevin McCullagh

Broadcasters around the world are looking at the prospect of a winter World Cup in 2022 with a mixture of concern, indifference, and a small amount of optimism, according to a survey by *TV Sports Markets*.

Fifa, football's world governing body, is considering the move to winter because of fears about the effect on players and fans of the summer heat in host nation Qatar. Last week Fifa opened a consultation process on the switch.

*TV Sports Markets* talked to 20 rights-holders of the 2022 World Cup, covering the US, Europe, and Asia-Pacific, about the impact of a change which many in the industry now believe to be inevitable.

Several free-to-air broadcasters raised concerns about clashes with other winter programming and the loss of rare audience-driving summer content. Pay-television broadcasters said they

were worried about losing content which helps limit summer churn and having big gaps in schedules because of suspended club football leagues.

Against this, there were many broadcasters who said that the impact of a winter World Cup would be limited because they would have so much time to plan for it. Many broadcasters said that the presence or absence of their national team would be of far greater significance to their ratings than the winter/summer decision.

Some broadcasters said that a winter World Cup could attract stronger audiences than a summer tournament because audiences are generally higher in winter. Some Asian broadcasters said that Qatar was a good time zone for their audiences, regardless of when the tournament is played.

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## US SPORT

# NFL: Twitter deal will drive TV ratings

By Frank Dunne

The National Football League's deal last month with Twitter to use the social media platform to distribute short-form video content is a significant staging post in the development of digital sports media consumption.

However, it is unlikely to be an overnight game-changer, either for the NFL or for sports rights-holders generally. For the NFL, the one-season

deal is very much an experiment in reaching and engaging fans, with a view to encouraging take-up of other NFL media.

If successful, the deal is likely to be extended to include in-match footage from more games next season (see panel, page 7). The NFL will also explore distribution deals with other social media platforms, including Facebook.

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## Sky Italia and Eurosport in tough carriage talks

Italian pay-television platform Sky Italia and pan-European sports broadcaster Eurosport are locked in difficult negotiations about Sky's carriage of the Eurosport channels. The present contract ends in December.

Sky and Eurosport are said to be far apart on terms and conditions. One well-placed source said that negotiations were difficult because both sides were convinced that they were negotiating from a position of strength.

Eurosport last month signed a carriage deal with Italy's second pay-television platform Mediaset Premium. It is not thought to be anywhere near as lucrative as the existing Sky deal, but enables the broadcaster to cover the Italian market should the Sky deal fall through.

Sky, on the other hand, has been strengthened by the recent launch of the Fox Sport channels. Fox and Sky are both owned by Rupert Murdoch's 21st Century Fox. The Fox Sports channel currently carries only football, but the broadcaster is in advanced talks with a wide range of rights-holders with a view to launching a multi-sports channel early in 2014.

Sky has also been strengthened by a deal finalised last week with the IMG Media agency for Wimbledon tennis. This guarantees Sky coverage of at least one of the grand slams on its platforms. The US and Australian Opens are carried by Eurosport and will end up exclusively on the Mediaset platform if the carriage talks fail.

Sky signed with IMG for a further five years, from 2014 to 2018, paying a small increase on its current fee of about €2m (\$2.7m) per year. Sky is thought to have initially looked for a cut in fees for Wimbledon, with IMG pushing for an increase. The compromise was that by agreeing to pay a slightly higher fee, the broadcaster would get the rights for longer than the three years originally offered. Sky's last deal was

for three years, from 2011 to 2013. Prior to that, Sky had a six-year deal from 2005 to 2010.

Sky is increasingly focusing its investments on guaranteed subscription drivers and it is debatable whether Wimbledon adds many new subscribers. But the event confers prestige and Sky uses Wimbledon in all of its marketing and promotions. ■

## SuperSport talking to MetroTV

Sub-Saharan pay-television broadcaster SuperSport is in talks to sublicense some of its newly-acquired Ghana Premier League football rights to local free-to-air broadcaster Metro TV.

SuperSport acquired the exclusive domestic rights last month in a three-year deal with the league, from 2013-14 to 2015-16, worth about \$700,000 (€519,000) per season.

For the previous five seasons, the rights had been held by media company Optimum Media Prime, a sister company of Metro TV. Both are run by businessman Talal Fattal. OMP is understood to have paid around \$350,000 per season in the last three seasons, 2010-11 to 2012-13.

OMP also covered production costs. SuperSport will take on these costs in the new period. One local expert estimated production costs to be around \$300,000 per season.

OMP previously sublicensed some matches to SuperSport, and kept others for broadcast on Metro TV. Both SuperSport and Metro TV showed live matches each week.

In the new cycle, SuperSport will show two live matches per week. The number of matches on free-to-air television is yet to be finalised. ■

## EBU close to deal with Fina

The European Broadcasting Union is understood to be close to renewing its pan-European rights deal with Fina, the world swimming federation, for 2014 onwards.

The current deal, from 2010 to 2013,

covered the Fina World Championships in 2011 and 2013, and the Fina World Swimming Championships (25m) in 2010 and 2012. The rights covered 62 territories.

The new deal has been negotiated during an exclusive negotiation period in the current deal.

The current deal is one of Fina's two biggest globally, alongside a deal with commercial broadcaster TV Asahi in Japan. Fina's other rights-holders include state broadcaster CCTV in China, commercial broadcaster KBS in South Korea, media group NBCUniversal in the US, and public-service broadcaster CBC in Canada.

## Fox sniffing around Pro League

Belgian industry insiders expect Fox International Channels to make a bid to enter the local sports television market this year with an offer for domestic football league rights.

FIC, which is owned by 21st Century Fox, made a surprise entry into the neighbouring Netherlands last year with a 12-year deal for the domestic football league, the Eredivisie (*TV Sports Markets* 16:15).

The Belgian Pro League is expected to launch a tender late this year or early in 2014 for its domestic rights in the three seasons from 2014-15 to 2016-17.

Pro League president Ludwig Sneyers said in April that FIC was a potential domestic rights buyer. Local experts this week backed the view.

Belgium's three main pay-television operators Telenet, BeTV and Belgacom will also bid. The league is the main subscription-driving sports content for pay-television.

FIC is expected to launch new channels in the market if successful. The proximity of Belgium to the Netherlands would allow it to use the same technical facilities for its coverage, one source said.

In the current cycle, from 2011-12 to 2013-14, the league earns €55.2m (\$74.5m) per year from deals with Telenet and Belgacom. ■

## FOOTBALL

## US, European and Asian differences over winter switch

Continued from page 1 ►

Rupert Murdoch's Fox, the World Cup rights-holder in the US, last month hit out at the idea of a switch, saying it had bought the rights "with the understanding they would be in the summer as they have been since the 1930s." It is particularly concerned that a winter World Cup would fall during the NFL American football season, for which Fox holds rights.

The broadcaster this week told *TV Sports Markets*: "Fox Sports is pleased with Fifa's decision to further examine the impact of moving the 2022 Fifa World Cup to the winter and supports all further dialogue on the matter."

The consultation process will run into next year, and perhaps into 2015.

### Clashing calendars

Potential clashes between a winter World Cup and the winter Olympic Games, the International Ski Federation World Cup season, and major non-sports programmes are concerns for many broadcasters.

International Olympic Committee president Thomas Bach has had talks with Fifa and expects it to consider a November/December World Cup, rather than a January/February tournament, which would clash with the Olympics in February.

Uefa president Michel Platini is said to favour January to avoid a clash with the Uefa Champions League and Europa League tournaments.

For broadcasters in much of northern Europe, clashes with winter sports coverage are an issue. Some European broadcasters also pointed to potential clashes with November/December season finales for major entertainment shows, such as *X Factor*.

Broadcasters said the clashes would pose a range of potential problems. Events happening at the same time could cannibalise each other's ratings. It would be difficult to get advertisers to

| Fifa World Cup rights-holders, 2018 and 2022                          |                                                         |                                      |                 |
|-----------------------------------------------------------------------|---------------------------------------------------------|--------------------------------------|-----------------|
| Territory                                                             | Buyer                                                   | Broadcaster type                     | Total fee (\$m) |
| Australia                                                             | SBS                                                     | Public service                       | 36              |
| Brazil                                                                | Globo                                                   | Commercial/pay-TV                    | n/a             |
| Canada                                                                | Bell Media                                              | Pay-TV                               | 73              |
| Caribbean                                                             | Sportsmax                                               | Pay-TV                               | n/a             |
| Europe (37 territories)                                               | EBU                                                     | Public service                       | 420-425         |
| Middle East and North Africa                                          | Al Jazeera                                              | Pay-TV                               | 350-400         |
| Scandinavia                                                           | Denmark - DR, TV2; Norway - NRK, TV2; Sweden - SVT, TV4 | Public service/<br>commercial/pay-TV | 90              |
| South Korea                                                           | SBS                                                     | Commercial/pay-TV                    | 180-200         |
| US                                                                    | Fox, Telemundo                                          | Commercial/pay-TV                    | 1,037           |
| Source: <i>TV Sports Markets</i>                                      |                                                         |                                      |                 |
| Footnote: All fees converted to USD at exchange rates on 30 Sept 2013 |                                                         |                                      |                 |

pay top prices for a World Cup and a winter Olympics that were too close together. A source in the Asia-Pacific region said a November event could hit advertising revenue, as budgets begin in February for many advertisers, and are largely spent by November.

One European broadcaster said it would struggle to cover a winter World Cup alongside its annual winter sports coverage, as this would cause "really very serious problems with personnel and technical resources."

Some European public-service broadcasters said they could struggle to justify showing too much sport on their schedules if the Olympics and World Cup were too close together. Under their public-service remit they must cover a variety of programme genres.

### Shares and churn

Another major concern for many European broadcasters is the loss of content which props up their annual audience share by bringing strong ratings at a time of year when television audiences are generally weak. Good weather and the holiday season make summer traditionally the weakest time for European broadcasters.

A similar seasonal problem for pay-television broadcasters is that the World Cup is content which can limit the loss of subscribers – churn – after the European club football season ends in May.

One pay-television broadcaster in a market where the rights remain unsold said moving the World Cup to winter would kill its interest, which was based on three things: adding subscribers, reducing

churn, and providing a marketing platform. In winter it already has strong sport to act as a marketing platform.

Arguably the broadcasters hardest hit by the switch would be pay-television broadcasters that have not secured World Cup rights. They risk having a black hole in their schedules as domestic football leagues, the Champions League and the Europa League would all be suspended for a month mid-season.

### Asian indifference

Asian broadcasters were the least concerned. Coverage is on pay-television in many territories, and the broadcasters' only potential concern would be a clash with the English Premier League, the most important football property in Asia, which does not appear likely. Asian domestic football leagues generally run during the calendar year, and in any case are less popular than the Premier League in major markets, except Japan and Korea.

"In Asia, it makes no difference whether the World Cup is held in summer or winter," one pay-television broadcaster said. "Asian broadcasters are actually very excited about the prospect of the tournament taking place in Qatar regardless of the time of year, as the time zone will be the best it has been for a long time." How good Qatar will be for Asian audiences will be down to kick-off times, however, which are yet to be fixed.

A factor separating South East Asia from Europe, according to another source, is that audiences, programming and advertising revenues are not seasonal, because the weather is similar all year round.

## Upsides

Around the world, broadcasters predicted that audiences would not be hit, with a winter World Cup expected to pull audiences as big as – if not bigger than – a summer World Cup. As one European head of sport put it, “people will watch if the national team are playing – a winter World Cup won’t really make that much of a difference.”

Other factors that would make the switch to winter easier are that broadcasters would probably have at least six years to plan for it, and that it would be a one-off, with Fifa returning to a

summer World Cup from 2026 onwards.

Some broadcasters played down the problem of clashing programmes. Entertainment series season finales are generally two-hour programmes that could be rescheduled fairly easily, they argued. And advertising will not be a problem for the many World Cup rights-holders that are heavily state funded.

## No legal threat

Fifa is not thought to be at risk of leaving itself open to legal action from broadcasters if it goes ahead with the move to winter. “Compensation would

only be possible in the case that the World Cup was cancelled,” one broadcaster said.

Previous Fifa World Cup media rights tenders have included clauses stopping bidders from making their offers contingent on “the location of venues, participating teams, scheduling of matches, or other specific requirements relating to the competitions.”

They have also included notes saying that the dates and venues of competitions within the tender were subject to “final written confirmation from Fifa.” ■

## EUROLEAGUE

# Canal Plus gains in Spain but loses in booming France

By Dan Horlock and Robin Jellis

Euroleague Basketball achieved increases in rights-fee income in France and Spain, two of its key markets, by dropping incumbent rights-holders in favour of new partners.

In France, the value of the rights increased by almost 15 per cent as pay-television operator beIN Sport outbid rival pay-television operator, and long-standing Euroleague rights-holder, Canal Plus. In Spain, Canal Plus picked up the rights at the expense of existing live partner, the public-service broadcaster TVE.

The increases put the Euroleague on course to earn at least €20m (\$27m) in the coming season from its global media-rights sales, which would represent an uplift of more than 18 per cent on fees in the 2012-13 season. The league keeps about 30 per cent of fees, with the remaining 70 per cent split between the competing clubs in each country.

## France

The four-year deal signed last week in France with beIN Sport, from 2013-14 to 2016-17, is worth an average of about €1m per year. beIN Sport will pay about €950,000 in the first year of the contract, increasing to more than €1m in the final

year. The broadcaster will also cover production costs for matches in France, at about €15,000 to €17,000 per match.

Canal Plus held the rights in the last three cycles. Its previous three-year deal, from 2010-11 to 2012-13, was worth €880,000 per year. It included a bonus of up to €100,000 per year linked to the success of French teams. However, the league never received the bonus as a French side never made it past the group stages. There is no bonus payment in the new deal.

Canal Plus is understood to have tried to agree another three-year deal at the same fee level. beIN Sport wanted the rights for five years, but the league, which normally agrees three-year deals, agreed a compromise of four years. There were no other bidders.

Al Jazeera’s long-standing association with the league via its Middle East rights deals is understood to have helped beIN Sport secure the rights. Al Jazeera’s current Middle East deal runs from 2013-14 to 2016-17.

beIN Sport has now taken two basketball properties from Canal Plus in the last year. In November 2012, it agreed a four-year deal, from 2012-13 to 2015-16, for NBA basketball for about \$4.5m (€3.3m) per year. The rights were previously held by Canal Plus, basic-tier sports broadcaster Ma Chaîne Sport and now-defunct pay-television broadcaster Orange Sport.

Basketball is currently on a high in France. In September, the national team won EuroBasket – the European championships – for the first time,

beating former champions Spain in the semi-final, and Lithuania in the final. France has two teams in the 2013-14 Euroleague – Paris-based JSF Nanterre and Strasbourg IG. The first group stage matches this season will be played on October 17.

beIN Sport’s Euroleague rights cover all home and away matches involving French teams. It must also show at least one match per week from the Top 16 and play-off stages, even if both French clubs have been eliminated, and all matches from the Final Four.

The Mediapro agency helped the Euroleague secure the deal. Mediapro and the Euroleague work together on rights sales and production in certain territories.

## Spain

Last month, pay-television broadcaster Canal Plus acquired the Euroleague rights in a three-season deal, from 2013-14 to 2015-16, worth about €1.5m per season. The majority of the value is for the live matches involving Real Madrid.

This season will be the first time that live action of the league will be shown on pay-television in Spain. The deal was negotiated by the IMG Media agency.

Last season, Real Madrid’s matches were shown live on TVE. The broadcaster paid a nominal rights fee and gave the league broadcast sponsorship rights around its coverage. Real has won the competition a record eight times but lost in last year’s final to Greek team Olympiacos.

Real Madrid and Unicaja Málaga matches will be shown exclusively on

Canal Plus. The broadcaster will show non-exclusive coverage of the other two Spanish sides in the competition, Barcelona and Saski Baskonia.

The Canal Plus Deportes channel will broadcast regular season games, along with the Top 16, the play-offs and the Final Four, which takes place from May 16-18 in Milan, Italy. The broadcaster will also provide coverage via Yomvi, its online service.

Regional broadcasters TV3 and ETB acquired non-exclusive rights for their respective teams, Barcelona and Saski Baskonia. Catalan broadcaster TV3 acquired the rights to Barcelona's matches

in a deal worth €1m per season while Basque broadcaster ETB paid about €500,000 per season for the rights to Saski Baskonia's matches.

The deals bring the total value of the rights in Spain in the coming cycle to about €3m per season.

### Canal Plus strategy

The Euroleague deal is part of Canal Plus's plan to acquire all top basketball rights. In July, it extended its deal with US basketball league the NBA. The broadcaster is also thought to be close to a deal to acquire the rights to the Liga Endesa, the top-tier league in Spain, from

next season. One rights expert said that the property would be worth about €3m per season to a pay-television operator.

"Acquiring all the most important basketball rights could help to stop subscribers from churning out of pay-television," the expert said.

In June, Canal Plus had 1.6m satellite subscribers. It lost more than 88,000 satellite subscribers over the six-month period from December.

The Liga Endesa rights are held by TVE until the end of this season in June. The league receives a small rights fee in addition to broadcast sponsorship around TVE's coverage of the matches. ■

## RUGBY LEAGUE

# BeIN Sport buys World Cup to bolster 'home of rugby' tag

By Robin Jellis

BeIN Sport last month beat competition from rival French pay-television broadcaster Canal Plus to secure rights to the 2013 Rugby League World Cup in a deal worth about €400,000 (\$540,000).

The Al-Jazeera-owned broadcaster has bought exclusive live rights to all matches, and highlights rights. The rights cover France and overseas French territories. They were sold by the IMG Media agency on behalf of the Rugby League International Federation.

IMG is understood to have spoken to all broadcasters in the market, although no tender was issued. BeIN Sport won the rights after making a higher rights-fee offer, and greater production commitments, than Canal Plus, which is thought to have been its main rival in the bidding.

The rights to the last World Cup, in 2008, were held by now-defunct pay-television broadcaster Orange Sport.

BeIN Sport will cover the production costs of the two matches taking place in France. These are France v New Zealand on November 1 and France v Samoa on November 11.

Production costs to the other games are shared equally between IMG and the

tournament's two UK broadcasters – public-service broadcaster the BBC and pay-television channel Premier Sports.

The BBC will show 11 games from the tournament on a non-exclusive basis, mostly involving home nation teams – England, Ireland, Scotland and Wales. Premier Sports will show all matches.

The World Cup is being jointly hosted by the UK, Ireland and France from October 26 to November 30.

Rugby league is a niche sport in France. The major markets for the sport are Australia, New Zealand and the UK.

### Targeting rugby

BeIN Sport is positioning itself as the 'home of rugby' in France, with properties from both rugby league and the more popular rugby union. It has rights to rugby league from the Super League and the Australian National Rugby League. It also has rights for rugby union from the English Premiership and the Pro12.

BeIN Sport is thought to be interested in live rights for the top French domestic rugby union league, the Top 14, which may soon be on the market.

Top 14 rights-holder the Ligue Nationale de Rugby is considering using a clause in its current five-year deal with Canal Plus, from 2011-12 to 2015-16, to put the rights back on the market early. The current strong competition between beIN and Canal Plus could lead to a bigger rights fee. Canal Plus pays an average of €31.7m per year.

The LNR can end the contract this year, between September 1 and December 31.

### IMG deal

IMG has a four-year deal with the Rugby League International Federation covering the rights to the 2013 and 2017 World Cups, and the 2014 and 2016 Four Nations tournaments. The Four Nations is contested by Australia, England, New Zealand and one other nation. The fourth nation changes each tournament and has not yet been decided for 2014. ■

## FOOTBALL

# Tough Italian market is chance to impress Fifa

By Frank Dunne

The MP & Silva agency appears to have accepted something of a poisoned chalice in taking on the sale of the Italian rights to the 2018 and 2022 Fifa World Cups.

Fifa tried, and failed, to get what it considered market value for the rights. That problem, in an increasingly difficult market, has now been passed on to the agency.

For the 2010 and 2014 World Cups, world football's governing body brought in €340m (\$475m) from state broadcaster Rai.

Over the last 12 months, Fifa has had talks with broadcasters including Rai, pay-television operator Sky Italia, and the Mediaset media group. It is understood that all proposals were a long way from Fifa's valuation of the Italian rights. Italy was one of the countries Fifa carved out of

its wider European package, which it later sold to the European Broadcasting Union.

One Italian broadcaster said this week that the agency would struggle to match current values. He said that while the agency's two founders, Riccardo Silva and Andrea Radrizzani, were Italians, the agency did very little business in the country and did not have particularly strong relationships with broadcasters.

In the last sale, the price was pushed up by strong competition between Rai and Sky. Rai also knew that if it won all the rights, it could secure a good sublicensing deal with Sky for the pay-television rights.

Since then, Rai has been sucked into a massive financial crisis and Sky's subscriber base has contracted. Sky is looking for \$200m of cuts over the next three years and is reviewing its spending on major events such as the World Cup and Olympic Games.

Some local experts argue that it is a good deal for the agency, however, for several reasons. First, it is not a buyout deal but is commission-based, so there is no risk of incurring meaningful losses. Second, the agency has time on its side and there are signs that new players could enter the bidding.

Discovery Communications has just emerged as a player in the Italian sports television business with its €10m acquisition of the rights to rugby's Six Nations tournament (*TV Sports Markets* 17:16). Fox Sports launched this year and is making international football the bedrock of its programming. Fox has an entirely separate budget to that of Sky, despite both being owned by Rupert Murdoch's 21st Century Fox. And Qatari pay-television broadcaster Al Jazeera, with whom the agency has a strong relationship, has been studying an entry into Italy and other

Mediterranean markets for some time.

Perhaps most importantly, however, the deal confers prestige on the agency in its home country. This is especially valuable at a time when the company has come under fire in some sections of the Italian media for the profits it makes on the sale of the international rights to the top Italian football league, Serie A.

If it achieves a positive result in a difficult market like Italy, MP & Silva would also strengthen its relationship with Fifa, which could put it in a good position to win World Cup rights in other markets.

The agency already sells some media rights to the 2014 World Cup. It acquired the rights in Oceania, outside Australia and New Zealand, from Australian public-service broadcaster SBS. It also acquired the rights in Vietnam for Fifa events in a two-year deal, covering 2013 and 2014, with the governing body. ■

## US SPORT

# NFL looks to social media to reach and engage fanbase

*Continued from page 1 ►*

But social media will never be a primary revenue driver for the league, nor is it expected to be.

The strategy will not be an easy one for other rights-holders to copy because the NFL is rare among sports bodies in having stripped its digital short-form rights out of its main broadcast contracts both in the US and around the world.

In 2009 and 2011, when the NFL embarked on renegotiations of its main broadcast deals, it carved out two sets of rights: the rights for the NFL RedZone, a digital channel offering real-time highlights of Sunday afternoon games; and in-match highlights of all games for its digital platforms such as NFL.com or NFL Mobile.

William Field, of the Prospero Strategy consultancy, and former adviser to English football's Premier League on new technologies, said that social media platforms like Twitter and Facebook would increasingly become vehicles for

sports video, but that there were obstacles to its rapid development because of the way most sports audiovisual rights were packaged and sold.

While digital carve-outs are common among the big US leagues, they are more complicated for European rights-holders. Twitter and Facebook are global platforms so can work well where global rights to the clips have been retained by the rights-holder or are held by a single intermediary. Where geo-blocking is required, the "Twitter or Facebook routes become more complicated," he said.

Nevertheless, this and other recent developments in the way sports clips are monetised demonstrates that their importance is increasing and is likely to be reflected in changes to rights packaging in the next cycle of deals, over the next three to five years, he said.

"The money from digital clips is still very small compared to what broadcasters are paying for live," Field said, "so sports bodies will still face the problem: why give ourselves a headache with the operators who are delivering nearly all of our income?"

"There can be win-wins but broadcasters will need to be convinced that clip coverage on social media and other platforms is a form of promotion for their own content.

Only a strong and forward-looking rights-holder can have that conversation and manage the rights in a way that looks at the full picture," he added.

### Incremental consumption

The NFL could have been forgiven for playing safe and doing platform-neutral deals to protect its main partners. Domestic broadcast income will be about \$7bn (€5.2bn) per season from 2014, according to *Forbes* magazine. The league also has a mobile rights deal with Verizon Wireless worth \$250m per season.

The Twitter deal is based on a share of advertising revenues between the NFL and Twitter. Pre-sales of the inventory reportedly brought in about \$10m.

The NFL says that its track record so far proves that, far from undermining the exclusivity of broadcast deals, digital coverage works as promotion for them, adding value for the broadcasters.

Hans Schroeder, the NFL's senior vice president of media strategy, said this week that since carving out the rights for the RedZone channel and for mobile and internet platforms, the NFL had seen "incremental consumption around both of those assets and both of those sets of rights, as well as an overall growth in our TV ratings."

He told *TV Sports Markets*: “When we take these decisions we try to weigh all sides of the scale to make sure we are not increasing consumption here but cannibalising it on the other side. We ask: how do we lift everything?”

He said that any new content distribution has to be “additive” to the entire business. “That’s our mindset in how we attack everything. We want to be sure we are not just creating new consumption that shifts people; we want to create more overall consumption.”

He said that the Twitter deal would “drive back more tune-in and more engagement with content on our other media assets, whether it is our [broadcast] partners’ games, the NFL Network, NFL.com or NFL Mobile. It can give a lift to our entire portfolio of assets.”

Schroeder said that when the NFL came to renegotiate its deals in 2009 and 2011, “the world was already moving towards an expectation of on-demand content. An important part of those deals was making sure we kept the rights to do things like this for all our games.”

Despite having digital rights to all games, however, the in-match highlights on Twitter will only cover Thursday night games, which are shown by the NFL Network. There will be no in-match content from the games carried by ESPN, NBC, CBS, Fox or DirecTV.

Schroeder said that this was because the league “wanted to test a little bit what the best experience” was before expanding coverage. “We will do that around our games first to make sure we are smart and know the best execution,” he said.

“As we get smarter and know exactly how to maximise that, then we will look to roll that out down the road. We wanted an evolution in our approach, not to completely flip everything upside down from day one.”

### Reach, engage, monetise

There are a number of reasons why the NFL decided that Twitter would be the right platform to reach and engage fans and drive take-up of its other media products.

The NFL currently has over 5m followers of its official Twitter account, which delivers news and match reports. But the potential exists to hugely expand

that. About half of Twitter’s 200m active users are in the US and NFL research suggests that there are about 200m people in the country who consider themselves fans of the NFL.

“There is a lot of conversation happening around the NFL on Twitter outside of the people who already follow our account,” Schroeder said. “We are going to reach more of our addicts but we also hope to see more of the casual fans who might not know there is a game on Thursday night – now they see some highlights and they tune in.”

### The NFL on Twitter

The NFL will provide bespoke daily content to Twitter, including in-game highlights from the NFL Network’s Thursday Night Football and post-match highlights from other games. The tweets will also carry links to news, analysis, fantasy football advice and voting from NFL Network and NFL.com.

The in-game highlights will be about 30 seconds long, with pre-roll adverts of six to eight seconds. The deal covers the 2013 regular season and play-offs.

There will be multiple sponsors of the content, including an exclusive sponsorship for the Super Bowl. The NFL’s mobile partner Verizon has already signed up as a sponsor. A second main sponsor, reported in the US media to be fast food chain McDonald’s, is due to be unveiled shortly.

As a global platform, Twitter is also a way of drawing both the passionate and casual fan around the world into the conversation, with a view to driving them to NFL media products.

“Internationally, because of the time zones and the geography, it’s hard to replicate that really strong communal aspect. One of the things about a social media platform, and us being more interactive, is that we can really bring our fans together,” Schroeder said. “It brings the community element which is complementary to watching the game itself. So it’s not just about getting to the avid first fan, but the reach of the second fan.”

Having a formal distribution deal, rather than a normal Twitter account, also

enables the NFL to benefit from a more active exploitation of the content by Twitter. Because Twitter is a real-time medium, tweets can move down the conversation stream very rapidly, especially for anyone following a large number of users. Under the agreement, Twitter will keep the NFL tweets at the top of followers’ streams for longer.

As Schroeder put it, “real time is great, but for high-traffic moments when there is a lot of conversation it can be tough to catch all of the activity. This is a great way to make sure that people don’t miss some of these rich highlights or updates or other things you want to push out through the platform. We thought that was a great area where Twitter was bringing value to the partnership.”

### Twitter v Facebook

According to the *Global Sports Media Consumption Report 2013*, produced by the Perform Group, *TV Sports Markets* and Kantar Media, 25 per cent of US sports fans now use social networks to access sports content. Of those, 77 per cent said they used Facebook, 47 per cent use YouTube and 33 per cent Twitter.

The NFL has not ruled out doing deals with other social media operators. “We are watching where our fans are spending their time and we want to be in those places and on those platforms as they emerge,” Schroeder said. “There are different players in the social space and Facebook is significantly ramping up what they are doing to be that second-screen experience as a companion to television.”

Arguably one of the curious aspects of the deal is that, having identified Twitter as the appropriate social media partner, the NFL chose only to do a one-season deal.

Schroeder said that the one-year term would allow the NFL to “experiment and to test and get a lot smarter about how our fans want to experience content on the Twitter platform and how that can drive value back to the rest of our media business.”

[www.](#) *For the full interview with Hans Schroeder visit our website.* ■

For information about the *Global Sports Media Consumption Report 2013*, contact Scott.longhurst@tvsportsmarkets.com.

# TVSM SPOTLIGHT 2013



## THE FOOTBALL MEDIA MONEY LEAGUE

TV SPORTS MARKETS COVERAGE OF THE MEDIA  
RIGHTS INCOME OF THE TOP 5 FOOTBALL LEAGUES

These are the rights deals that shape Europe's biggest TV markets. If you are in the business, you need to know them inside-out. The report, first published in 2012, has been updated with key developments since last year.

TV Sports Markets is a very useful tool for us as a football club. It gives us insights into the audiovisual market about the evolution of rights deals, negotiations and other developments.

Manel Arroyo,  
Member of the Board  
FC Barcelona

TVSportsMarkets

The report is available for  
**FREE** to TV Sports Markets  
content-licence holders.

To pre-order your copy,  
email [paul.santos@  
tvsportsmarkets.com](mailto:paul.santos@tvsportsmarkets.com)



**SPORTS CLIPS:** News from TVSM Daily from September 26 to October 9**MEDIA RIGHTS 1****Football: World Cup, Turkish Süper Lig, Liga, Serie A, MUTV and more**

- **Football:** The MP & Silva agency was appointed by world governing body Fifa to serve as the exclusive rights sales representative in Italy for the 2018 and 2022 World Cup tournaments in Russia and Qatar. The rights include live coverage and highlights of every match, as well as the 2017 and 2021 Confederations Cup national team competitions (page 5).
- **Football:** The MP & Silva agency agreed a two-year deal, covering 2013-14 and 2014-15, with Turkish pay-television operator Digiturk to distribute highlights rights for the Turkish Süper Lig. Digiturk has global rights for the league, including the domestic rights. The deal with MP & Silva covers all territories outside Turkey, except for the Netherlands in 2013-14. The highlights, which will be produced in English, cover nine games per week plus post-match interviews.
- **Football:** The Scottish Professional Football League appointed MP & Silva to sell its rights in the Middle East, North Africa and Asia in the 2013-14 season, extending an earlier deal under which the agency was appointed to sell global rights in the nine seasons from 2014-15 to 2022-23.
- **Football:** Pay-television broadcaster Fox Sports acquired the exclusive Australian rights to the Spanish Liga and the Italian Serie A for two seasons, 2013-14 and 2014-15. Fox will broadcast two matches live and two matches delayed each week from both leagues.
- **Football:** Major League Soccer club the Chicago Fire agreed a regional rights deal with cable-television operator Time Warner Cable Sports in the Wisconsin region. The deal began immediately and runs until the end of the 2014 season.
- **Football:** Italian pay-television broadcaster Sky Italia agreed a rights deal with Lega Pro, the governing body of the Italian third and fourth tiers, Prima Divisione and Seconda Divisione, covering the remainder of the 2013-14 season. The Sky Sport 24 channel will show highlights and a weekly magazine programme covering the leagues on the Sky Sport 24 channel.
- **Football:** Fijian commercial broadcaster Fiji TV agreed a three-year deal, from 2013-14 to 2015-16, to show programming blocks from English Premier League club Manchester United's in-house pay-television channel MUTV. The programming includes delayed coverage of United's games, documentaries and player interviews.
- **Football:** Pan-European sports broadcaster Eurosport acquired exclusive rights to all home games featuring German teams Wolfsburg and Turbine Potsdam in the 2013-14 Uefa Women's Champions League. Eurosport can also broadcast selected away matches from both clubs and matches featuring other teams, including French club Olympique Lyonnais.

**SINCE LAST TIME**

- The Fédération Internationale de l'Automobile, motorsport's governing body, and Formula One Management, the commercial rights-holder to the Formula One World Championship, signed a bilateral deal on the terms of a new Concorde Agreement for the period 2013 to 2020. The agreement determines the share of commercial revenues in the sport between the FIA, FOM and the competing teams. The bilateral deal followed the signing in July of a memorandum of understanding between the FIA and FOM. Separately, FOM has bilateral deals with 10 of the 11 teams currently in the championship, with Marussia still to sign. The new Concorde Agreement will come into force upon the signing of a tripartite agreement between the FIA, FOM and the teams. Under the new agreement, the share of the championship's ebitda enjoyed by the teams is understood to have increased from 50 per cent to 62 per cent. The amount of revenue passing back to the FIA has also increased significantly. The previous agreement expired at the end of 2012. FOM is majority-owned by private equity house CVC Capital Partners and run by Bernie Ecclestone. CVC is expected to float Formula One on the Singapore stock exchange once the Concorde Agreement is finally signed.
- IMG's owner, the private equity firm Forstmann Little, attracted more than 20 first-round takeover bids for the agency before Evercore and Morgan Stanley, the banks overseeing the sale, cut the shortlist to 10 suitors. The shortlist includes: joint bids from TPG Capital and the Creative Artists Agency, Silver Lake Management and the William Morris Endeavor Entertainment agency, KKR and New Mountain Capital, and CVC Capital and the Abu Dhabi Investment Authority, as well as bids from Bain Capital, Carlyle, Bahraini investment vehicle Mumtalakat, and media investor Peter Chernin.
- RCS MediaGroup, the organiser and commercial rights-holder of the Giro d'Italia cycle race, suspended three executives from its sports division in connection with an internal investigation into suspected financial irregularities. Former chief executive Giacomo Catano, operations manager Michele Acquarone and external relations director Matteo Pastore were suspended. Flavio Biondi resigned as chairman and was replaced by Raimondo Zanaboni.
- The Infront Sports & Media agency, the media-rights sales adviser to Serie A, the Italian football league, offered to guarantee the league media-rights income of €5.5bn (\$7.5bn) over six seasons, from 2015-16 to 2020-21, in a bid to retain its role. The agency proposed a new contract worth €900m per season for the 2015-16, 2016-17 and 2017-18 campaigns, rising to €930m for each of the 2018-19, 2019-20 and 2020-21 seasons. Infront's current six-year deal expires at the end of the 2015-16 season. Several clubs have raised concerns about the level of commission the agency earns under the deal. Infront said that it would launch a league television channel if offers for domestic rights from the country's main pay-television broadcasters, Sky Italia and Mediaset Premium, were below expectations.

**SPORTS CLIPS:** News from TVSM Daily from September 26 to October 9**MEDIA RIGHTS 2****American football, basketball, boxing, cycling, ice hockey and more**

- **Action Sports:** US sports broadcaster Fox Sports acquired rights for events run by media company Red Bull Media House. The deal will run for three years, from 2014 to 2016. Nearly 180 hours of live and highlights coverage of the Air Race World Championship, Crashed Ice World Championship, X-Fighters, Freestyle Motocross World Tour and Cliff Diving World Series will be shown per year on the Fox Sports 1 and Fox Sports 2 pay-television channels.
- **American Football:** Social networking website Twitter agreed a deal with the NFL to make video clips and other content available through its Amplify platform (page 1).
- **Basketball:** French pay-television broadcaster beIN Sport agreed a four-year deal, from 2013-14 to 2016-17, for the exclusive rights to the Euroleague (page 4).
- **Boxing:** UK pay-television broadcaster BSkyB extended a rights deal with promoter Matchroom Sport for a further two years, from 2014-15 to 2015-16. The rights include coverage of 20 events per year.
- **Boxing:** UK pay-television broadcaster BoxNation acquired rights to the world heavyweight title fight between Wladimir Klitschko and Alexander Povetkin on October 5.
- **Cycling:** Spanish public-service broadcaster TVE agreed a late rights deal for the finale of the UCI Road World Championships. TVE's digital-terrestrial sports channel Teledeporte and the RTVE.es website showed the championship's showpiece men's road race in Tuscany, Italy, on September 29. TVE struck the agreement with the Union Cycliste Internationale, the sport's global governing body.
- **Golf:** The European Tour extended a rights deal with pay-television broadcaster Golf Channel for 10 years, from 2015 to 2024, covering the US, Canada and Japan. The agreement covers all tour tournaments, and the two parties will continue to collaborate on production.
- **Golf:** The US PGA Tour expanded a partnership with news publisher the USA Today Sports Media Group to include new digital content. As part of the multi-year agreement, PGA Tour video coverage will be provided on USA Today Sports digital platforms.
- **Gymnastics:** Italian state broadcaster Rai agreed a rights deal with the International Gymnastics Federation. The deal began with the artistic gymnastics' 2013 World Championships, which took place from September 30 to October 6 in Antwerp, and runs until the 2016 Olympic Games in Rio de Janeiro. The deal covers men's and women's competitions.
- **Ice Hockey:** NHL team the Phoenix Coyotes agreed a one-year local rights deal with regional channels 3TV and CW6. The agreement covers 10 games during the 2013-14 regular season.
- **Ice Hockey:** Pay-television sports broadcaster SuperSport, which operates in sub-Saharan Africa, acquired rights for the NHL. SuperSport will show up to four live games per week during the regular season, the All-Star game, at least 12 games per round in the post-season playoffs, and the Stanley Cup playoffs and final. The deal was brokered by the Advisers Media International and Medge Consulting agencies, the exclusive NHL media rights distributor in Europe, the Middle East and Africa. The length of the agreement was not disclosed.

**MEDIA INTERNATIONAL**

- US media company Discovery Communications has entered talks with French media group TF1 to complete a takeover of their jointly-owned sports broadcaster Eurosport by the end of this year, earlier than planned, according to French newspaper *Les Échos*. Discovery acquired a 20-per-cent stake in Eurosport from French media company TF1 in December 2012. The deal included an option to increase its stake to 51 per cent in 2014, and an option for TF1 to then sell its remaining 49-per-cent stake to Discovery.
- US media company NBCUniversal has sold a record \$800m (€600m) in advertising for its coverage of the 2014 Winter Olympics. NBC said the figure could rise to about \$970m. NBC confirmed it will show the majority of its Winter Olympics coverage on a delayed basis, as it has done at previous Olympics. It will provide live streaming of the event on the internet.
- US media and technology company Comcast, owner of the NBC network, is considering bidding to take over the financially-troubled regional sports broadcaster Comcast SportsNet Houston, which has exclusive rights for the Houston Astros MLB baseball matches and Houston Rockets NBA basketball matches.
- US pay-television broadcaster ESPN said it would continue to distribute rights on a global basis for the US events on its X Games action sports tour, following its decision to close X Games events outside the US. ESPN is shutting the X Games events in Spain, Germany, Brazil and France because, it said, they are not economically sustainable.
- Al Jazeera-owned pay-television broadcaster beIN Sport has agreed a partnership with free-to-air and pay-television broadcaster TVB to launch two sports channels in Hong Kong. BeIN Sport 1 HD and beIN Sport 2 HD will launch on November 1. They will be packaged with the soon to be launched TVB Sport channel, which will be the only channel in Hong Kong to broadcast all 64 matches of the 2014 Fifa World Cup.
- IMG Productions, a division of the IMG agency, agreed a five-year deal, from 2013-14 to 2017-18, with media company the Forever Group to provide consultancy services on a new sports television channel in Myanmar. IMG worked with the Forever Group ahead of the launch of the For Sports 2 channel in July.

## SPORTS CLIPS: News from TVSM Daily from September 26 to October 9

### MEDIA RIGHTS 3

## MMA, motorsport, parasport, rugby, table tennis and US college sport

- **Mixed Martial Arts:** The Sportfive agency agreed a deal with M-1 Global to distribute the promoter's global media rights on an exclusive basis for four years, from 2013-14 to 2016-17. There is an option to extend the deal, which excludes the Russian market, by four years. Sportfive will also provide production, digital and archive sales services for M-1 Global.
- **Mixed Martial Arts:** The IMG Media agency agreed a three-year deal, from 2013-14 to 2015-16, to distribute all media rights for the World Series of Fighting on a global basis.
- **Motorsport:** Spanish agency Mediapro agreed a two-year extension to its Formula One rights deal, covering the 2014 and 2015 seasons of the championship.  
Commercial broadcaster Antena 3, which currently shows Formula One in Spain, is expected to agree a new deal with Mediapro for the rights.
- **Motorsport:** Nascar agreed a content partnership with youth-orientated sports media platform The Whistle. Nascar content and programming will be shown on The Whistle's website and mobile platforms, as well as the media company's channel on video-sharing website YouTube.
- **Parasport:** The Asia-Pacific Broadcasting Union acquired rights for Asian Paralympic Committee events under a new partnership between the two parties. The ABU will also handle production of live feeds, highlights and news packages for APC events, and will help distribute news coverage via Asiavision, its daily news exchange. The first event covered by the deal is the Asian Youth Para-Games in Kuala Lumpur on October 26-30. It also covers other major APC championships including the 2014 Incheon Para-Games.
- **Rugby League:** French pay-television broadcaster beIN Sport acquired exclusive rights for the 2013 Rugby League World Cup national team tournament, which will take place in England, Wales, Ireland and France from October 26 to November 30 (page 5).
- **Rugby Union:** US sports broadcaster Fox Sports agreed a deal with USA Rugby for the rights to the US national team's game against the New Zealand Maori All Blacks. The game will take place in Philadelphia on November 9. Pay-television channel Fox Sports 1 will show delayed coverage on November 10 at midday Eastern Time.
- **Table Tennis:** The Asian Table Tennis Union re-appointed the IEC in Sports agency as the global distributor of media rights for its events on an exclusive basis through to the end of 2017. The renewal, which was activated immediately, includes an option to extend the partnership for an additional four years. IEC in Sports will also provide television and digital production services.
- **US College Sport:** US sports broadcaster Fox Sports acquired rights for college basketball matches played at New York venue the Barclays Center in a deal with the venue. Pay-television channel Fox Sports 1 will broadcast five games from the series, beginning with the Kentucky v Providence game on December 1, as well as three games from the Brooklyn Hoops Winter Festival on December 28.
- **US College Sport:** Pac-12 Networks, the content and media company run by the Pac-12 conference, signed an exclusive multi-year agreement with Fox International Channels, a division of 21st Century Fox, for programming rights outside the US. FIC acquired rights for coverage of 20 sports including American football, basketball, football, volleyball, gymnastics, wrestling, baseball, softball, golf, cross country, track and field, swimming and diving.
- StarHub signed a deal with the Singapore Sports Council, the city-state's sports development agency, that will lead to the pay-television broadcaster's SuperSports Arena channel becoming free-to-air. Under the three-year agreement, from 2013-14 to 2015-16, StarHub will increase the amount of domestic sports content featured on its platforms. The channel, previously available only via a StarHub pay-television subscription, will be decrypted for any customer with an activated cable-television point.
- Horse racing pay-television channel Racing UK launched a pay-per-day service on UK digital-terrestrial platform Freeview. Racing UK Pay Per Day is available for a one-off payment of £4.99 (€5.95/\$7.95).
- UK pay-television operator BT is making content from its sports service BT Sport available for free during October to households with BT's basic television service, digital-terrestrial platform Freeview, or pay-television platforms BSkyB and Virgin Media.
- The CSI Sports media company launched its Fight Sports television channel in Singapore after agreeing a multi-year carriage deal with pay-television operator SingTel. The channel's content includes US pay-television broadcaster HBO's World Championship Boxing series, which includes live coverage of world title boxing fights operated by the WBA, WBC, IBF and WBO sanctioning bodies.
- International channel operator Fox International Channels agreed a deal to acquire pay-television sports broadcaster Setanta Africa, which operates in sub-Saharan Africa. FIC will take control of the Setanta Africa, Zuku Sports and Setanta Action channels. The agreement is subject to approval by the Irish Competition Authority. Setanta Africa was part of the Ireland-based international sports brand Setanta Sports.
- Australian pay-television horse racing channel TVN is planning to apply for a channel on the country's free-to-air digital platform. It currently reaches 30 per cent of the national television audience

**SPORTS CLIPS:** News from TVSM Daily from September 26 to October 9

through a carriage deal with pay-television operator Foxtel, which is due to expire next year.

**MEDIA RIGHTS NEGOTIATIONS**

- The Team Marketing agency launched tenders for the rights in the UK; Nigeria; South Africa, Swaziland and Lesotho; and the rest of sub-Saharan Africa, to the Uefa Champions League and Europa League club competitions. The tenders cover the three seasons from 2015-16 to 2017-18. The rights include four editions of the annual Super Cup, from 2015 to 2018. Bids in the UK tender are due by November 5. Bids in the African tenders are due by October 28. Team Marketing sells the rights on behalf of Uefa.
- The CAA Eleven agency launched a tender for the media rights in France to European qualifiers for the Uefa Euro 2016 and 2018 Fifa World Cup national team football tournaments.
- TF1 and rival French commercial broadcaster M6 said they would not bid for the next five-year cycle of media rights to the French Open tennis tournament, covering 2014 to 2018. The French tennis federation set a deadline of October 10 for bids.
- Russian commercial and pay-television broadcaster VGTRK is in talks to acquire rights for the NHL, the North American ice hockey league.
- The Gaelic Athletic Association, the governing body of Irish Gaelic sports, is considering its own internet-based subscription channel and pay-television channel as it assesses its options for its next domestic rights cycle, which begins in 2014-15. The GAA told local media that all options remained open, and it does not plan to move completely away from free-to-air coverage.
- Nascar confirmed that it would retain its current pay-television partners, ESPN and TNT, until the end of the 2014 season after reports that the US motor-racing series' new television deals could be brought forward to next year. Fox Sports and NBC Sports Group expressed an interest in starting their deals for the next cycle, due to begin in 2015, one year earlier than planned.

**ALSO SINCE LAST TIME**

- Rupert Murdoch's News Corp and digital specialists the Perform Group said that sports rights-holders are holding back the growth of mobile and internet sports consumption. News Corp's global head of rights Simon Greenberg and Perform joint chief executive Oliver Slipper, speaking at a *TV Sports Markets* webinar on the digital consumption of sport, said that rights-holders needed to separate the sale of main live television rights from the rights to short-form online content.  
[www.](#) Visit our website to download the webinar *Digital Sport: new platforms, new behaviours, new models.*
- The IMG agency, which distributes rights for sports properties through its IMG Media division, sealed a seven-year strategic partnership, from 2013-14 to 2019-20, with US video-sharing website Livestream to show and distribute live events.
- The Deutsche Fussball Liga, the German football league, agreed a deal with YouTube that will lead to the launch of the top-tier Bundesliga's first official channel on the video-sharing website. The league's in-house editorial team will produce video clips with English-language commentary on a daily basis for the new channel, along with 20 different videos per week that will be individually adapted for fans in different countries. Content will include the top five goals from each match day and classic moments from the league's history.
- The UK's All-Party Parliamentary Rugby League Group, a group of MPs, urged pay-television operator Virgin Media to agree a carriage deal with Premier Sports ahead of the pay-television broadcaster's coverage of the 2013 Rugby League World Cup, which starts on October 26. Premier Sports is broadcasting all matches from the tournament, which is being played in England, Wales, France and the Republic of Ireland. Despite three years of talks, Premier Sports has not secured a carriage deal with Virgin Media. BT denied that a series of recent price rises were linked to the launch of BT Sport this year and rejected claims that it had contributed to plans for leading clubs from rugby's Heineken Cup to form a breakaway European tournament.

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