Understanding the requirements of broadcasters - Trends in Europe

EBU: A Brief Background

European Broadcasting Union
- Professional association working on behalf of European public service broadcasters
- Headquartered in Geneva, Switzerland
- Founded in 1950
- 74 active members, from 56 countries in and around Europe
- Member broadcasters reach an audience of over 650 million weekly

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FEI Sports Forum,
IMD - Lausanne, Switzerland
Monday 27 April 2015

Stefan Kürten
Director, Sports & Business - EBU

Our views

Tell stories
- A great TV production is key!
- Secure technology
- Open innovation

Meet the broadcasters needs

Provide broadcasters with the best services

The case of Biathlon

[Diagram elements: graphs, data, icons related to broadcasting and technology]
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Eurovision is...

- the operational arm of EBU
- the Premier distributor of sports and news content
- operating for more than 60 years
Business Areas

Sports Rights Acquisition
News Exchange
Distribution Services
Host Broadcasting Services
Facts

- Over 30 Federations
- 18 Sports
- More than 120 Events per year
- 500 Competitions days/year
- 15,000 hours live coverage/year
- 5 billion cumulative viewers/year
Portfolio

FIFA - World Football
IAAF - World Athletics
FINA - World Swimming
IBU - World Biathlon
ISU - World Skating

UEFA - European Football
EAA - European Athletics
LEN - European Swimming
FIS - World Skiing
And additional Federations

FEI

EBU and FEI partners since 1989
New Agreement 2015-22 includes:

- World Equestrian Games
- European Championships
- World Cup Finals
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1. Sport is expensive compared to other programs
   Why?
   - Rights fees
   - Production costs
   - Production costs (belonging to broadcasters, e.g., football, etc.)

   But... remains strong when:
   - There is emotion
   - There is material evidence
   - It's large

2. Fierce competition between sports events
   - Less multiple-choice for sports to generate channel
   - Distribution of broadcasting on TV market
   - Less choices for viewing
   - Increased dependence
   - Increased choice of events in thematic programming

3. The number of thematic channels is exploding
   - Number of thematic sports channels 1980-2000

4. Less sport on generalist channels
   - Ratings are king!

Broadcasters need to maximise their audience figures
1
Sport is expensive compared to other programs

Why ?
- Rights fee
- Production costs
- Exploitation costs
  (unilateral production, on site facilities, etc.)

But...
... remains strong when:
- There is emotion!
- There is national interest!
- It is live!
2
Fierce competition between sports events

- Less available airtime for sport on generalist channels
- Strong fragmentation of TV market (100s of new channels in Europe in the last five years)
- Increasing Calendar conflicts
- Duration of sport events vs entertainment programmes
3

The number of thematic channels is exploding

Number of additional thematic sports channels since 1990

- Eastern Countries
- Nordic Countries
- Main Markets
- Western Countries

<table>
<thead>
<tr>
<th>Year</th>
<th>Eastern Countries</th>
<th>Nordic Countries</th>
<th>Main Markets</th>
<th>Western Countries</th>
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<td>1995-2000</td>
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<tr>
<td>2005-2011</td>
<td>57</td>
<td>12</td>
<td>49</td>
<td>8</td>
</tr>
</tbody>
</table>
Number of additional thematic sports channels since 1990
4

Less sport on generalist channels

% of sports programmes transmitted on generalist channels in the 5 big markets
% of sports programmes transmitted on generalist channels in the 5 big markets

- Olympic Years
- Non-Olympic Years
Broadcasters need to maximise their audience figures

Ratings are king!
Our views

Tell stories
- TV viewers should understand what they are watching
- Consistency between events
- A clear competition system
- Comprehensive language & graphics
- Participation of best athletes
- Create drama & emotions

Meet the broadcasters needs
- Convenient scheduling, dates and starting time
- Propose appropriate programs and content to broadcasters

A great TV production is key!
- Ensure production uniformity
- Optimize production expertise
- Embrace new technology
- Content tailored to each platform

Provide broadcasters with the best services
- Efficient on-site working conditions
- Accurate and on-time communication to broadcasters (standings, athlete’s biography, etc.)
Tell stories

TV viewers should understand what they are watching
Consistency between events
A clear competition system
Comprehensive language & graphics
Participation of best athletes
Create drama & emotions
Meet the broadcasters needs

Convenient scheduling, dates and starting time

Propose appropriate programs and content to broadcasters
Provide broadcasters with the best services

Efficient on-site working conditions

Accurate and on time communication to broadcasters (startlist, athletes biography, etc...)
A great TV production is key!

Ensure production uniformity
Optimise production expertise
Embrace new technology
Content tailored to each platform
The case of Biathlon

Background

EBU / IBU cooperation started in 1992

Key challenges faced:
- Political change to focus on TV
- Reorganisation of pyramid structure to ensure top-down structure, centralised rights & control
- Constantly changing formats
- Ensuring knowledge transfer between events

Milestones

- Change of sport(s) being reported: Biathlon introduced
- TV feeds: EBU/IBU
- Production guidelines implemented
- Rights holder workshops & briefings
- Audiences increased by 300% inside two cycles (eight years)
- Significant increase in media and marketing rights value
- Increased number of broadcasters worldwide showing events

Outcome

TV has become a key stakeholder of the sport through EBU.

This has led to:
- Major changes on competition formats
- Yearly calendar and timetable optimisation
- Production guidelines implemented
- Rights holder workshops & briefings
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Thank you for your attention!
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- Constantly changing formats
- Ensuring knowledge transfer between events
Milestones

- Change of calendar: Events dropped & new formats implemented
- Global production approach
- Production quality group setup
- First running order and coverage philosophy
- Graphics update
- Three levels of minimum production standards established (depending on events)
- Consistent visual identity on all media (TV / digital / website)
- Tailored content for digital platforms (live / news / background stories)
Production quality group setup

First running order and coverage philosophy

Graphics update
First running order and coverage philosophy

Graphics update

Three levels of minimum production standards established (depending on events)
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Consistent visual identity on all media (TV / digital / website)

Tailored content for digital platforms (live / news / background stories)
**Outcome**

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