

# Game, set and match:

The new rules for sports broadcasting

HOT MOMENTS



AT WORK



LIVE



AT HOME

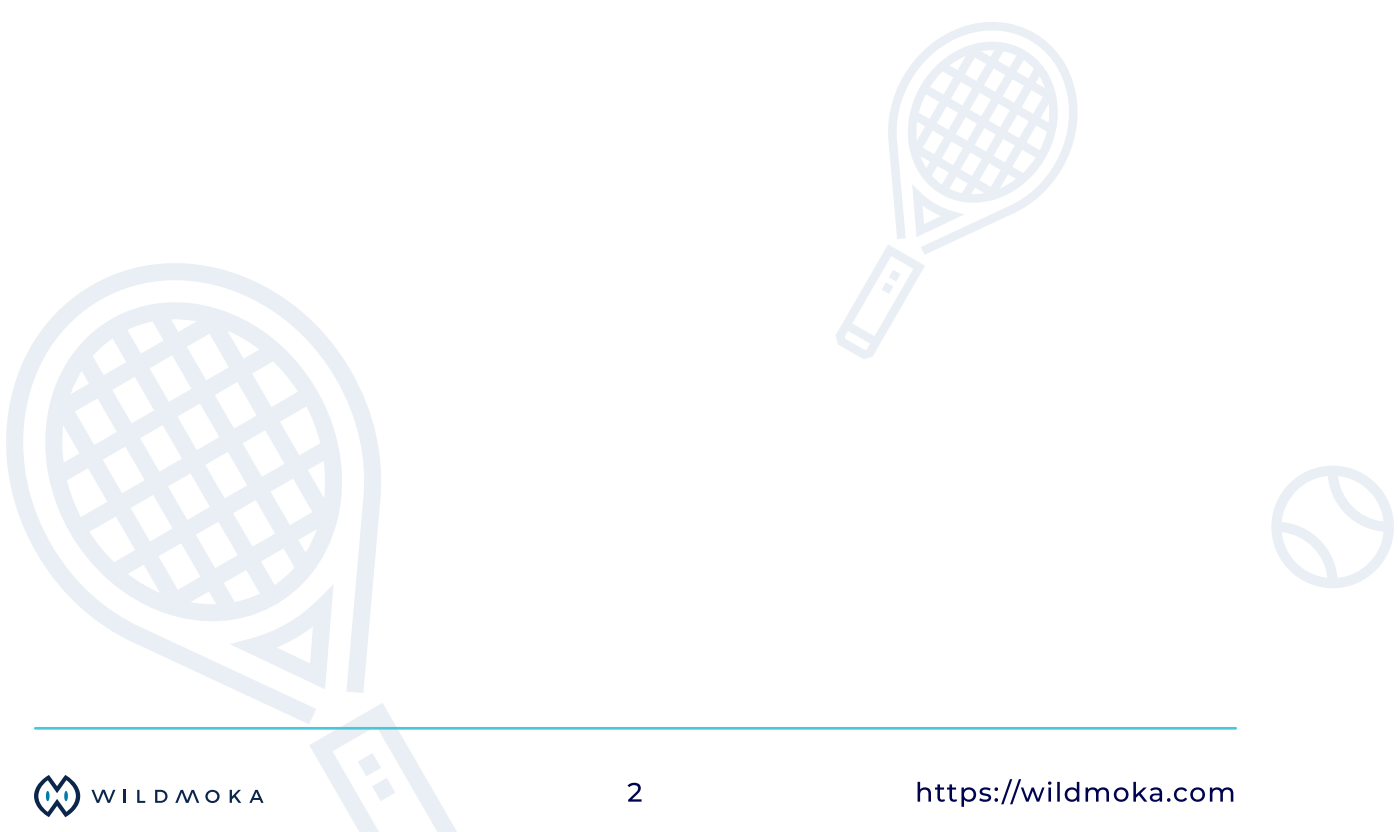


ON THE MOVE



# Contents

Executive Summary.....	3
Introduction: a new model for broadcasting sports competitions.....	4
How technology is disrupting live sports broadcasting.....	8
Ace! How live streaming is a win-win-win-win.....	14
How France tv used Wildmoka to boost viewer access to its content.....	20
Adapt to the new model and give audiences control.....	22



# Game, set and match: the new rules for sports broadcasting

## How digital content distribution allows on-demand, personalized viewing of sports competitions - the case of The French Open, on France Televisions

### Executive Summary

The way that audiences consume televised live sports tournaments, from tennis to the Olympic Games, cycling to the World Cup, is undergoing a radical transformation. Digital broadcasting and cloud-based video production are changing the rules of the game, creating new models for engagement and consumption of live video for sports.

Sports fans are now omni-channel viewers with much higher control over how they enjoy and experience tournaments. Broadcasters are moving to a model that allows viewers to access both long or short-form content (from entire matches to extracts or summaries) when they want, where they want, and on the device they choose.

The new model represents a move from a televised “today’s unique Menu” to “digital-a-la-carte.” This shift is a significant break from the traditional model of broadcasting live sports tournaments and is a trend that is only expected to rise.

This case-study explores this trend, using Roland-Garros 2019 - the “French Open” - as a supporting use-case, to show how this new model benefits everyone across the value chain: fans, athletes, broadcasters and advertisers alike.



## Introduction: a new model for broadcasting sports competitions

Elite sports tournaments are among the most prized and prestigious events for broadcasters all over the world. There are enormous commercial opportunities for those broadcasters that bring the feats of world-class athletes to a delighted fanbase. Vast audiences tune in for tournament finals, key races and matches between the titans of a sport, and these enormous peaks of viewership make for lucrative prime advertising opportunities.

Ever since the first major international sports broadcasts in the middle of the 20th century, television programmers have, by and large, followed the same model. The TV company that wins the rights to distribute footage of the sport distributes content as follows:

1. Depending on the kind of event, the channel's editors select which matches, events or legs will be broadcast live on air:
  - For multi-sport competitions such as the summer and winter Olympics, this might involve selecting the most popular games—choosing to broadcast the 100m sprint, for instance, over an archery event taking place at the same time
  - In match sports like tennis, soccer or rugby, the national team or player is always prioritized, and then the focus is on the teams regarded as the 'best.'
  - In endurance competitions such as cycling, a certain number of hours per day are set aside to show live footage, usually of the race leaders

On a daily basis, the broadcaster produces a 'highlights' show, with a summary of what happened in the main events (for anyone who was at work or in a different time zone), as well as a handful of other matches and moments of interest such as interviews, press conferences and even celebrity tantrums.

This model has long been the approach for most broadcasters, and although in recent years IP-TV carriers have allowed more concurrent broadcasting channels to cover multiple matches on TV, the model has remained stable. For 'generalist' sports fans this approach was fine, but it has let down others:

- For *aficionados* who wish to watch as much sport as possible, the choice has long been limited
- For people who are at work, it is impossible to watch everything they want
- For fans of the Olympics in particular, it can be challenging to watch more niche events in full
- For people living away from their home country who wish to watch a world cup competition, it can be tough to watch all their country's games on local television



## Disrupting the traditional linear TV broadcast model

The rapid evolution of digital technology means that we are now seeing a transformation in sports broadcasting, which turns the traditional model on its head.

Remote access to live sport events is democratizing thanks to digital OTT unlimited number of channels. Audiences are becoming self-serving, choosing the content they want to see, when they want, via a mobile app or a desktop browser, instead of being dictated what they can and cannot watch by a linear broadcaster.

In many countries, digital TV and pay-TV sports channels started this evolution with a 'multi-menus' model, enabling an increasing amount of sports events shown simultaneously over multiple broadcast TV channels. For example, the French sports broadcaster RMC Sport can scale up to 16 concurrent linear TV channels to cover all types of events and shows in parallel.

The next phase of this evolution is the move from this "multi-menus" to a full "a-la-carte, on-demand" model similar to what people are already experiencing in other entertainment markets like music (enabled by the likes of Spotify) or filmed entertainment (i.e. Netflix-style).

This new model presents a radical break from the past and an exciting opportunity for broadcasters, fans, athletes, and advertisers. Such an evolution wouldn't be possible without the extensive use of new technologies, and in particular without the introduction of cloud-based video production platforms (such as pioneered and led by Wildmoka) that sits at the heart of it all, and unlocks the number of video streams that can be continuously pushed to viewers over digital OTT channels.

In this white paper, we will look at how one top broadcaster, France Televisions (France tv), introduced this new model for sports broadcasting, and we will explore how its use in the summer 2019 French Open turned out to be a complete game changer

## Roland-Garros and France Televisions – an innovative partnership

For 126 years, Roland-Garros has been the number one tennis competition in France and is considered one of the four global 'grand slams.' The French Open, as it is otherwise known, has been broadcast on France tv, the national broadcaster for many years and a long, close partnership has developed between the two institutions. In its 119th edition this year, Roland-Garros was watched by some 32.5m viewers on linear TV in France, and the tournament added millions of incremental viewers to its OTT and social media channels.



**france•tv**

## How technology is disrupting live sports broadcasting

As mentioned previously, the very large distribution of content over digital channels allows viewers to take the 'driver's seat', selecting the specific games or surrounding events he or she wants to watch. An example:

At a tennis tournament, a fan wants to follow her favorite tennis player through every single match. However, the 400th seed is a relative unknown, and so none of his matches are played on the main courts and therefore not available on linear TV. However, thanks to digital OTT streaming, the fan can now choose to watch every single game that her favorite tennis star plays live.

So, how does this new kind of digital content distribution work? At this year's French Open, France tv provided this level of complete flexibility and choice to a national audience. In particular, France tv allowed viewers to:

### Watch LIVE games online

At the 2019 Roland-Garros, every single match was made available on France tv's website and App (france.tv sport), from the first serve of the tournament to the moment the winners raised the competition's [trophies](#).

Historically, only matches on the **three** main courts were broadcast on linear TV, during a few hours of the afternoon. In 2019, unlocked by OTT content distribution, **all 841** games could be transmitted, **16 courts** were streamed live **all day**, including doubles, disability, and 'past champions' games. The coverage on digital amounted to **around 2000 hours of live streaming**.

**By using the france.tv sport app, or France tv's desktop and mobile website, viewers were able to easily switch between courts and see different games being played concurrently, in real time and without the need for any subscription.**

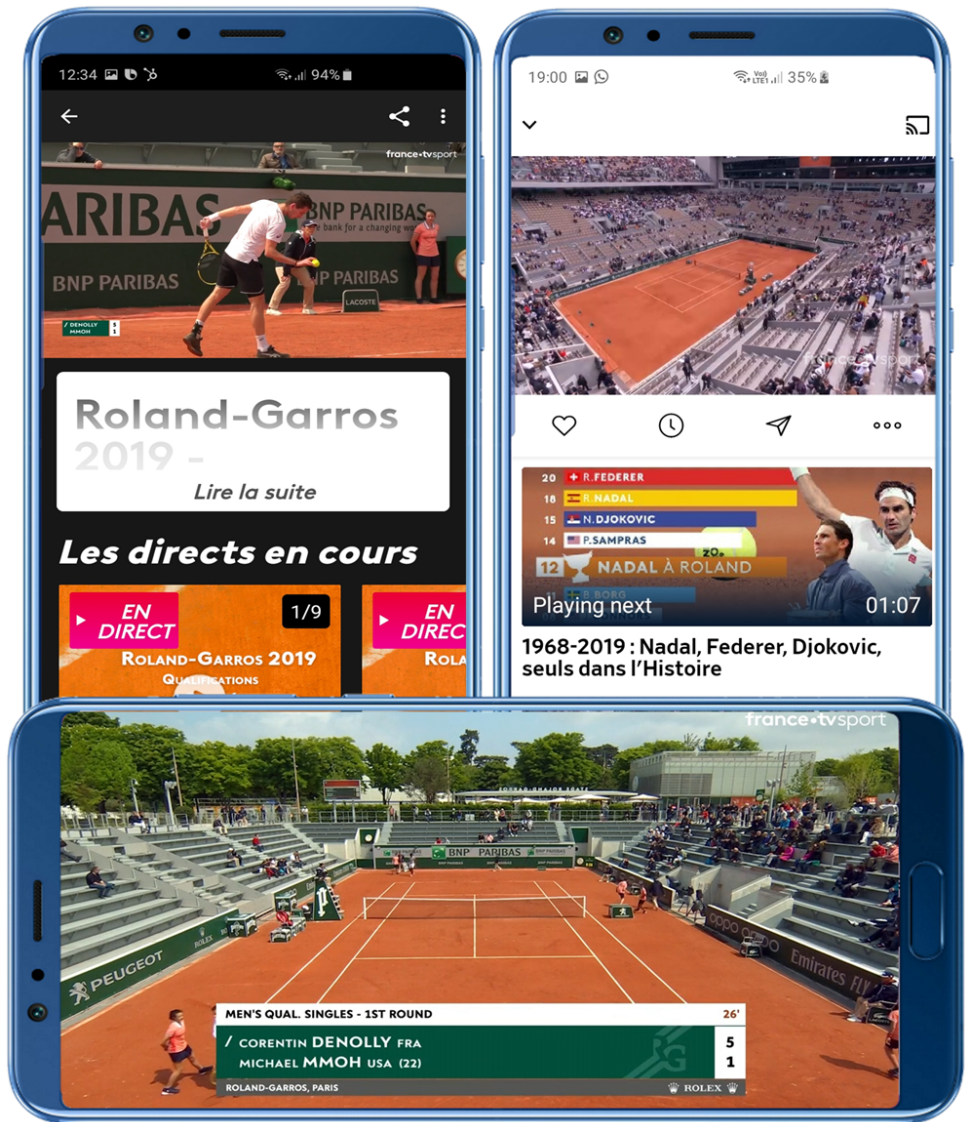
With Roland-Garros happening during the day at a time people are still at work, the desktop support remains popular.



(Free) Mobile App

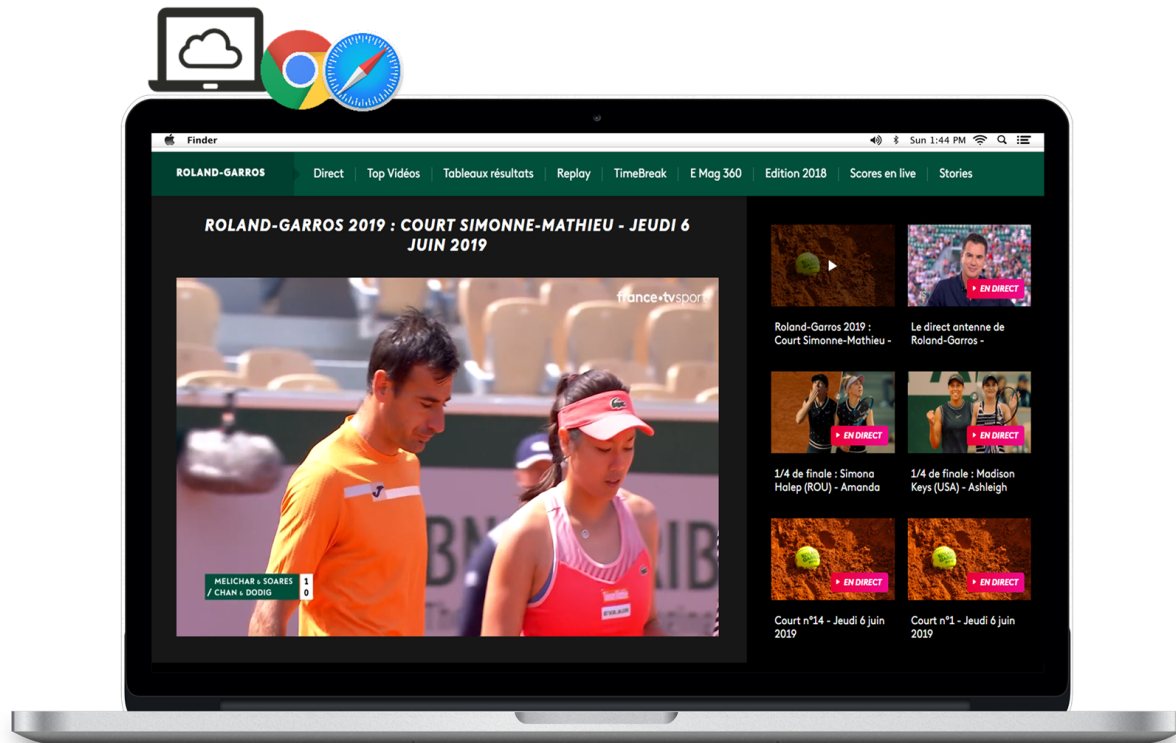


Mobile App

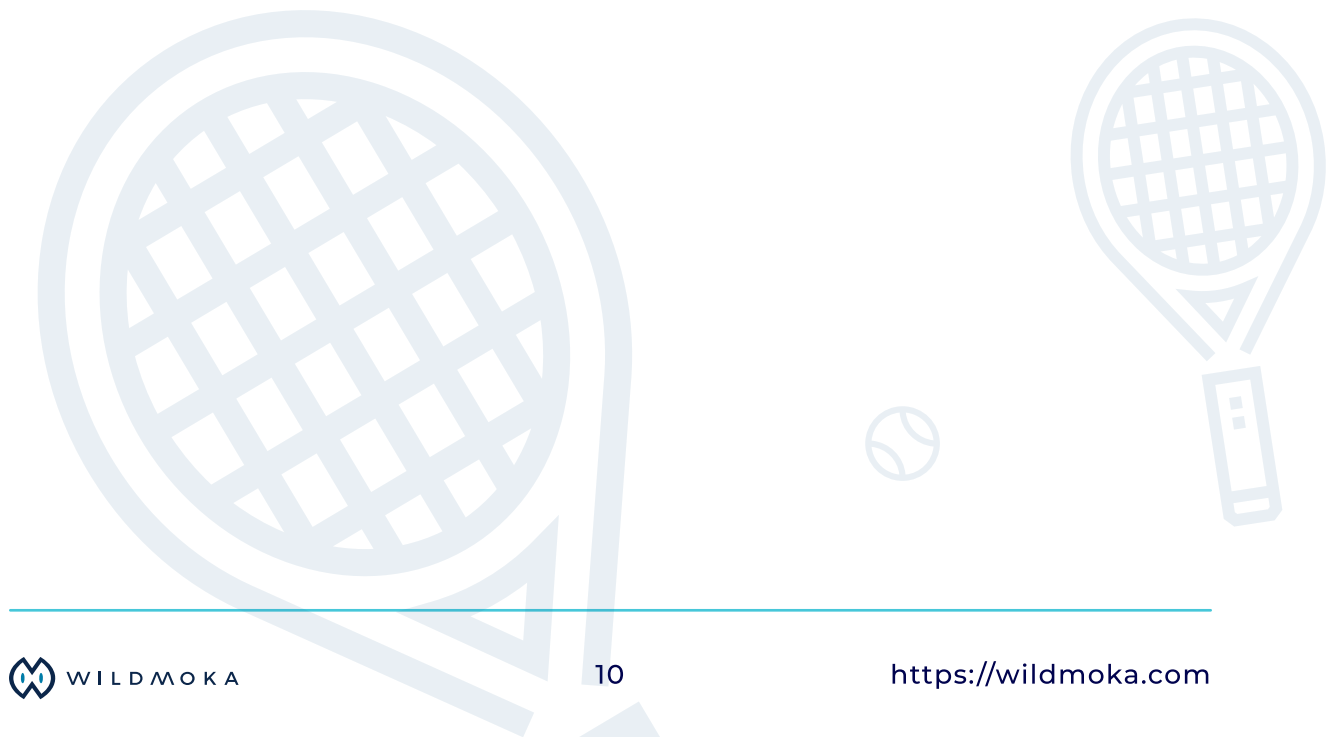


france.tv sport app provides viewers with the ability to watch any tennis games played at Roland-Garros on their mobile and tablet devices

## Web browser (desktop and mobile)



france.tv sport website offers the entire range of tennis games plus match results, clips, highlights and commentary.



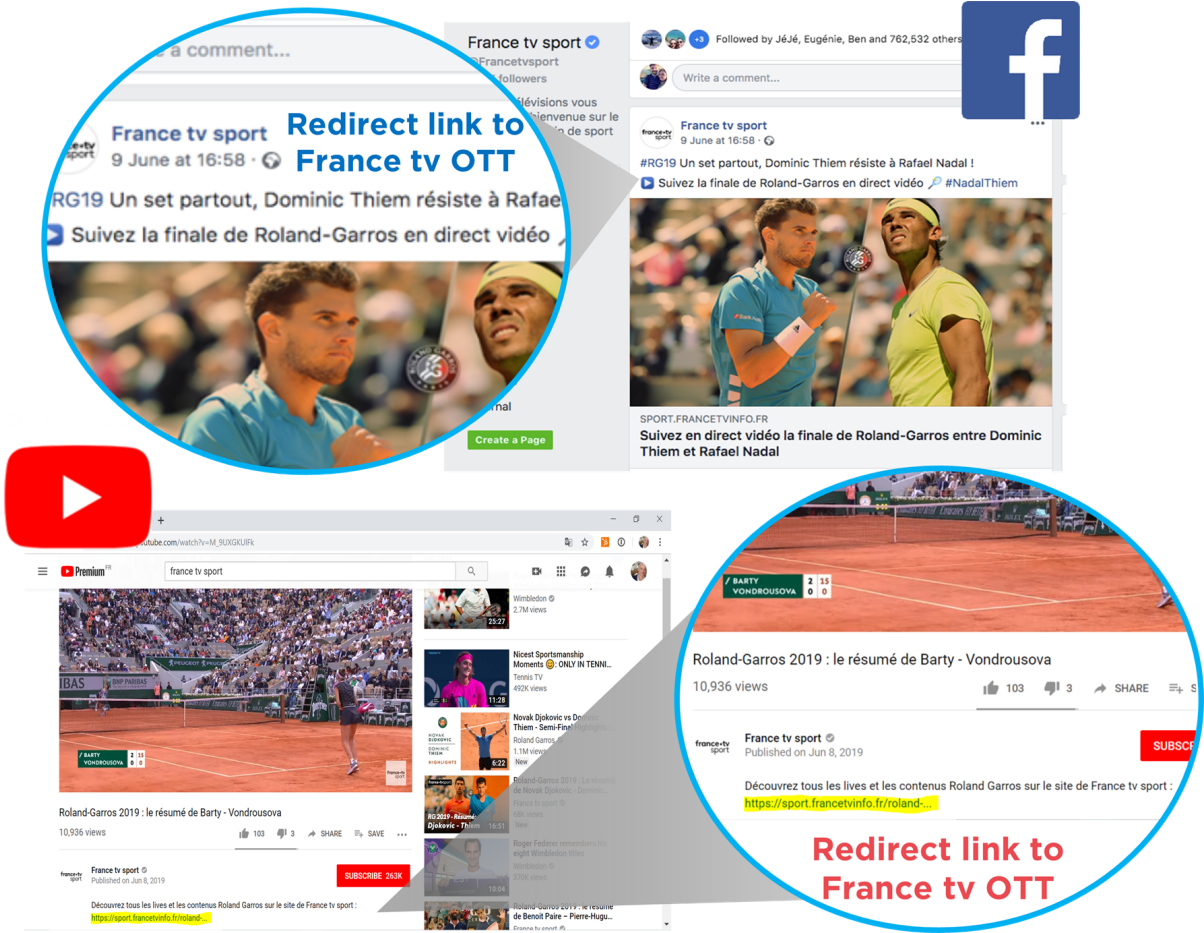
## Watch summaries and clips on social media

Leveraging the enormous quantities of filmed content, France tv's editors were constantly creating additional material and posting match summaries (10-20 minutes), or clips (1-4 mins) on social media or to their OTT platform, to the benefit of fans who couldn't watch live.

France tv created thousands of clips and posted several hundred summaries to the leading social networks: YouTube, Facebook, Twitter, Instagram, Snapchat, and Dailymotion.

Every social channel showed content specifically tailored to its audience: for instance, Instagram was not used at all to show tennis games but to talk exclusively about what was happening around the arena of the stadium, using interviews with celebrities, journalists, politicians and other commentators.

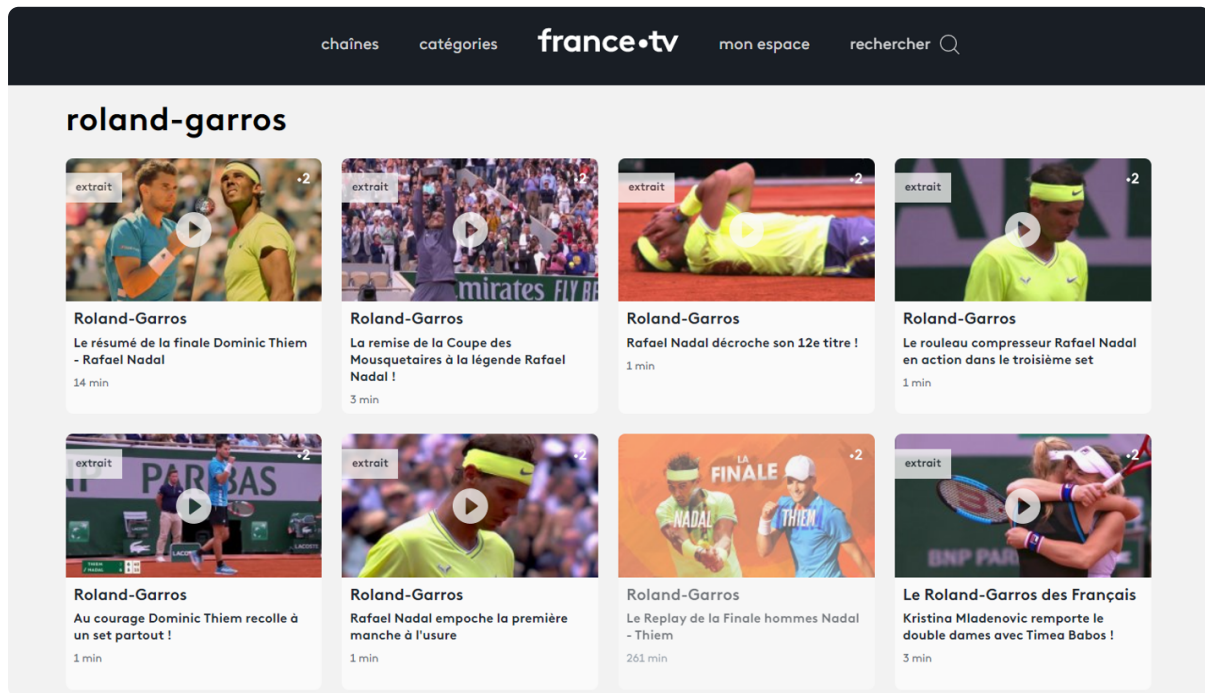
No live content was streamed on social networks. Instead, the editorial team deliberately chose to only publish extracts, summaries and teasers which were aimed at encouraging social network viewers to shift to the France tv internal OTT platform to experience the full entertainment of the tournament. In order to do so, short form videos on social were tagged so that a simple click of the viewer would bring him to the France tv platform.



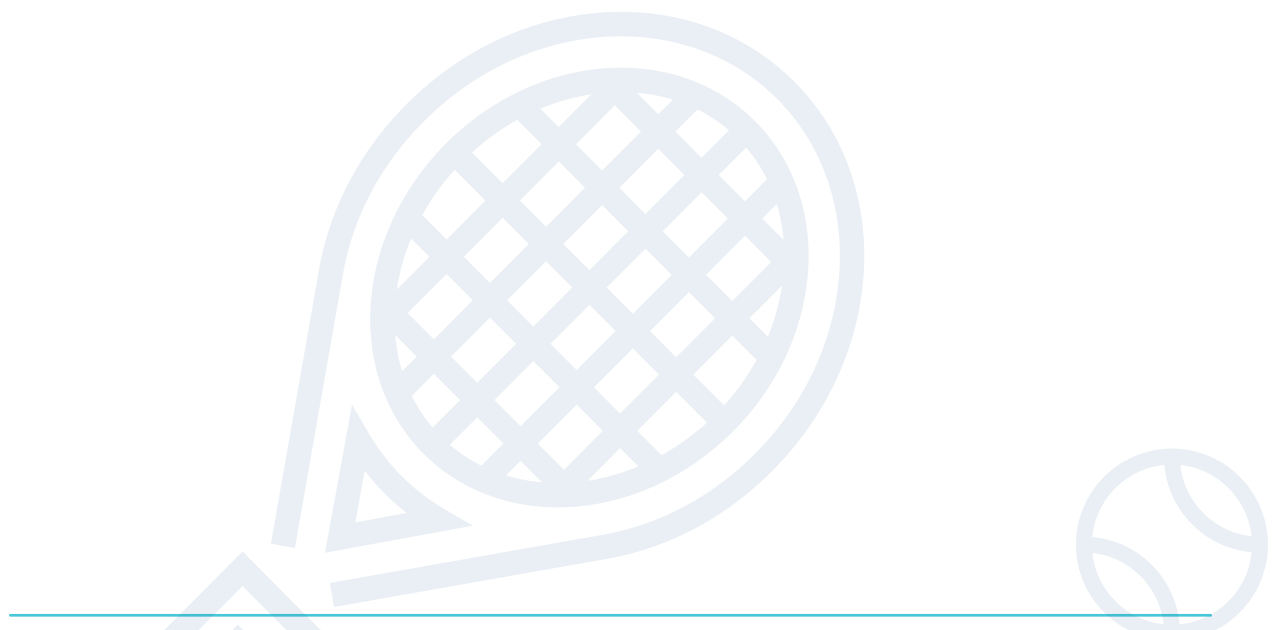
Every single post France tv's social pages is an opportunity to drive traffic back to its sports app

## Access Replays on demand

What's more, fans were also gifted the ability to watch critical tennis moments with over 300 videos available through France tv's OTT platform, including some full match replays.

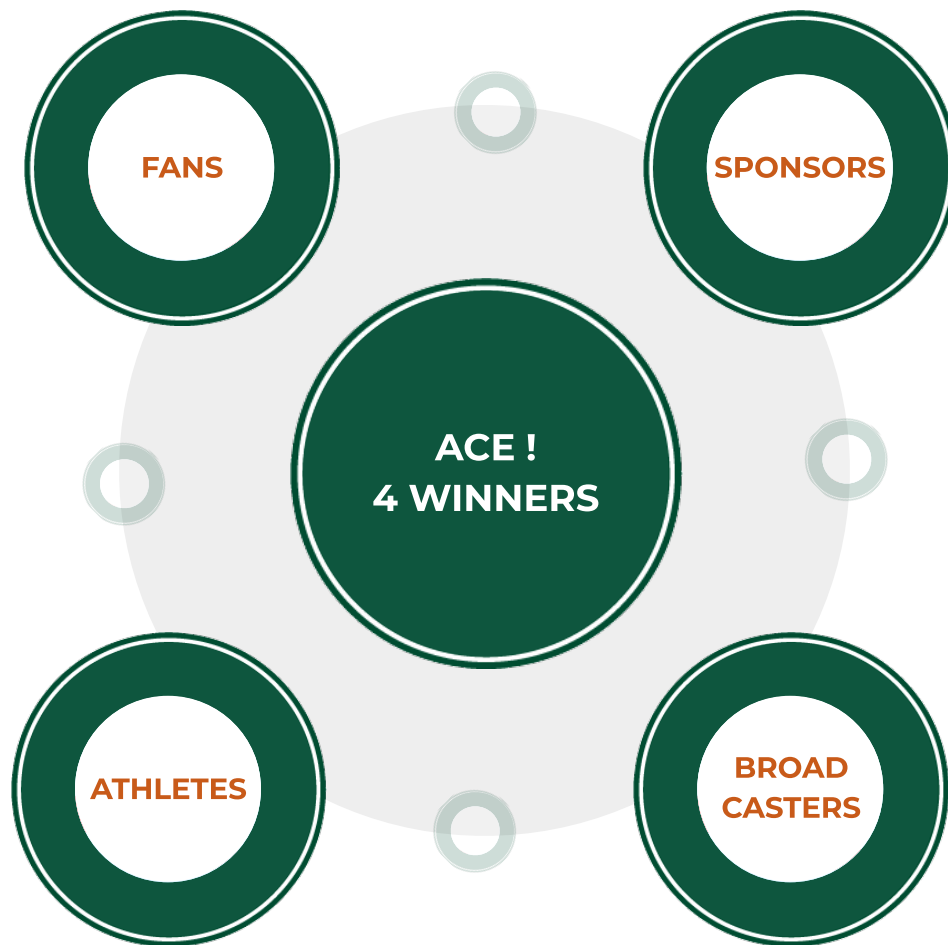


Handing over the power to audiences in this way is a fundamental change to what has gone before. In the next section, we'll see how this benefits everyone.



## Ace! How live streaming on digital OTT is a win-win-win-win

This new model for delivering sports content, which puts the power of what to watch in the hands of the viewers requires a big change in mindset from broadcasters and a well-architected video workflow for digital live streaming, clipping and publishing. However, those who do choose to rise to the occasion stand to benefit.



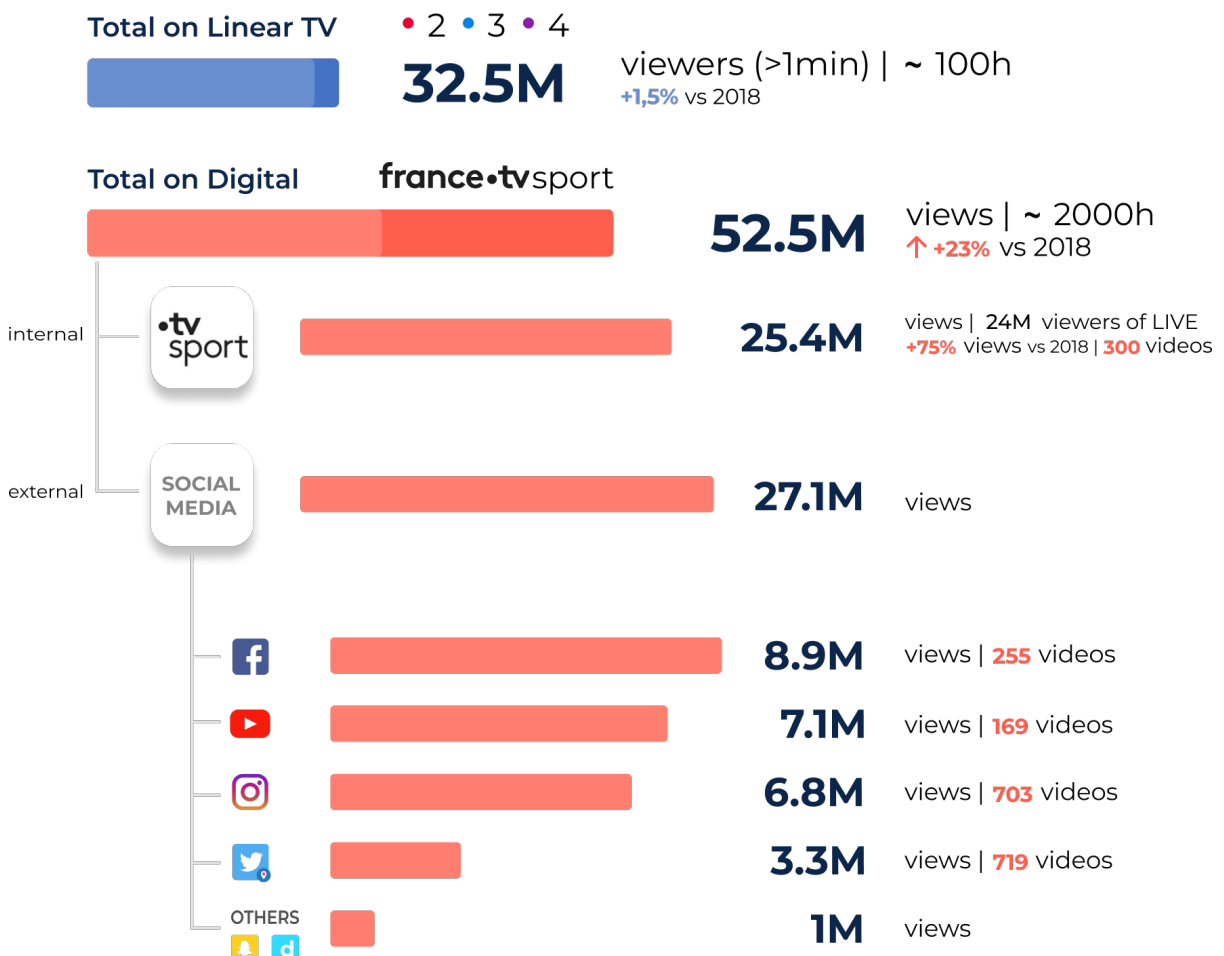
Everybody wins : Fans, athletes, sponsors and and broadcasters

## For broadcasters: more views, larger audience, better monetization

With more content published than ever, broadcasters can expect much larger audiences. Since launching their new model, France tv registered an enormous increase in viewer numbers on digital channels, reaching nearly **53 million digital views of content** (over the 3-weeks tournament period, including france.tv OTT and france.tv on social media networks).



### FRANCE TV TOP PERFORMANCE GROWTH ON DIGITAL



These figures represent **an increase of 23%** vs. 2018 according to France tv. What's more, content shared on France tv's own OTT platform, watched live by some **24 million people**, saw an incredible **increase of 75%** vs. 2018 and accumulated more than **25 million views**.

The best part? This online content didn't detract too much from linear TV, where viewership also increased **by half a million over 2018**. Indeed, the extra material on social likely drove people to turn their TVs on for big games.

From the 27M views on social, Facebook scored the best with nearly 9M views for 255 videos posted by france.tv. YouTube ranked second with more than 7M views for 169 videos posted. In the third place, but with pretty similar numbers to YouTube, Instagram scored nearly 7M views with 700 videos (please note that in Instagram, videos are 5 to 15 seconds long with often minimal edits (selfie-like content), so this explains the high number of videos). The high score of Instagram highlights the fact that the surrounding activities (interviews) are important to cover in addition to the sport itself.

### **For athletes: increased exposure and recognition**

Unlocking content distribution and coverage of sports events helps to raise the profile of lesser-known athletes. In multi-sport events such as the Olympics, athletes who compete in less popular sports can increase their sport's popularity, and start to attract sponsors.

At Roland-Garros, 19 concurrent live streams were broadcast, as well as additional channels for press conferences and interviews. This means unseeded players had the opportunity to capture a larger audience than before. Similarly, the ability to share clips on social meant that 'unknown' players who played unbelievable volleys or incredible serves could very quickly gather a following that would otherwise have eluded them and help with their career.

### **For fans: An incredible buffet of all-you-can-eat content**

Naturally, all this choice provides great opportunities for audiences to be very selective in their choices of tennis content. From the complete sports addicts to fans of one particular player (or even their friends and relatives!), to people who want to dip in and out of the latest by watching summaries on social media, this new approach hands all the power to the audience.



## For sponsors: A unique marketing communication opportunity

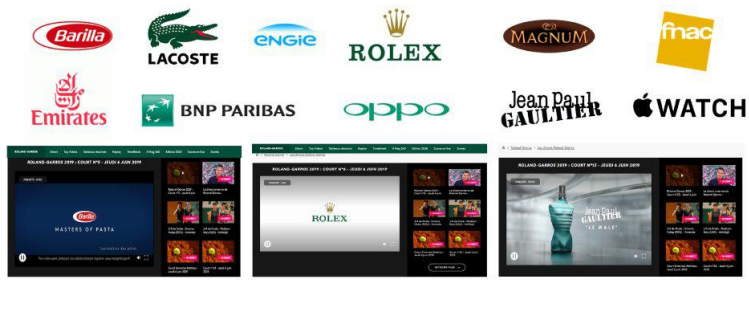
There was a time, not so long ago, that when a major brand like Rolex, Barilla, Apple or BNP Paribas would make a significant ad buy on a high profile sports event (such as Roland-Garros), yet the physical advertising real estate would become a limiting factor for both advertiser and brand. There are, after all a finite number of prime time advertising slots to sell on TV, or tennis courts to brand.

In an era of unlimited digital content distribution, all of that is changing. The proliferation of content streams unlocked by cloud-based technologies means much more flexibility and opportunity for advertisers, such as:

- **Brand association:** It is always valuable for brands to be associated with major sports tournaments and the values they carry. A trend is to have the ad content directly related to the specific sports event. For example, at Roland-Garros, the Italian pasta brand Barilla was streaming an ad with Federer as a central character, Emirates had a special ad showing how they would facilitate the viewer's attendance of the venue in Paris. Yet another example was a Magnum ice-cream's video ad co-branded with Roland-Garros. For a mass-market brand, being directly associated to the Roland-Garros' brand and event provides very powerful branding benefits.
- **Video Ad frequency:** The ability to increase the number and rate of placement through pre-roll and mid-roll Ads (despite a significantly higher CPM (cost-per-thousand), results in better overall exposure for the brand. A majority of social media clips or live streams from France tv included a pre-roll advertisement, and possibly a mid-roll one, meaning brand video messages were played tens of millions of times in just three weeks.
- **Connection to the audience:** One advantage of advertising on digital compared to linear TV is the possibility to insert a CTA (Call-to-Action) in the ad to redirect the viewers directly to the brand's website if the viewer happens to click on the advertisement, providing 'warm' referral traffic to the brand's digital platforms.

## FRANCE TV OTT PLATFORM AD MONETIZATION

Video pre-roll and mid-roll have high CPM  
Pre-roll and Mid-roll Ads : 10 to 70 secs

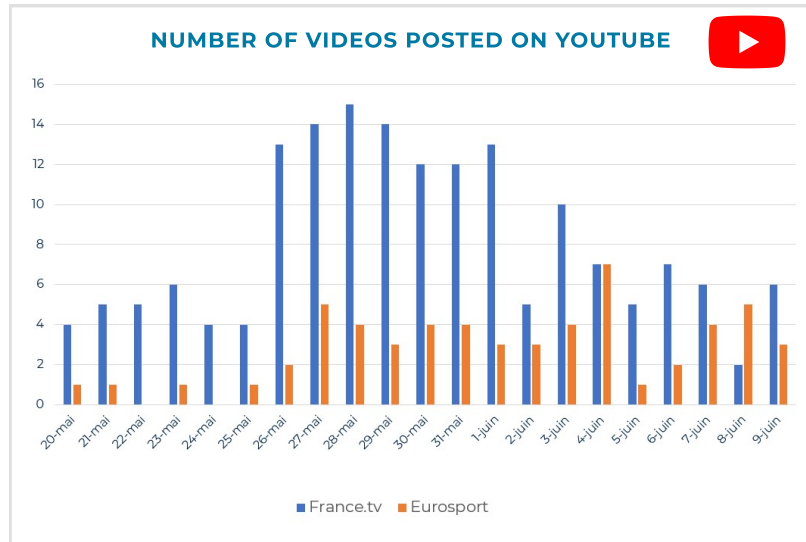


*A note on Dynamic Ad Insertion (DAI):* Using the Wildmoka platform, France tv could place ads into live streams literally at the best possible moment. The goal being able to monetize the live stream while the attention of the audience remains high, but without interrupting people during critical moments in the game. This form of ad insertion is seen as preferable to pre-roll as it is judged less intrusive by viewers.

As mentioned earlier, France Televisions considerably increased its number of views on digital in 2019 compared to last year for the same tournament. And on some social media platforms, more views translate directly into more money. For instance, when comparing the number of clips posted and viewed just on YouTube by france.tv versus Eurosport (another broadcaster that was also covering the event in France), france.tv had **6 million more views on YouTube than Eurosport**. Even assuming a low CPM, an **increase in 6 million views can translate into hundreds of thousands of Euros in incremental revenues in only three weeks**.

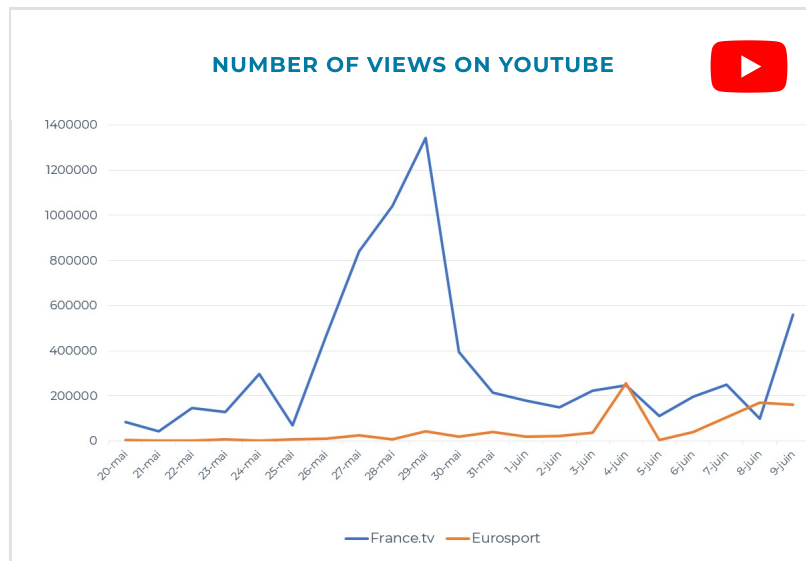
YouTube summary	France.tv	Eurosport
Number of views	7.07M	0.98M
Number of clips (May 20th to June 9th)	169	58
Best Video clip (in # of views)	406k	157k
Total duration of video posted	17h	5h
Average video duration	6min 03sec	5min 04sec

	Number of Videos on YT	
	France.tv	Eurosport
9-juin	6	3
8-juin	2	5
7-juin	6	4
6-juin	7	2
5-juin	5	1
4-juin	7	7
3-juin	10	4
2-juin	5	3
1-juin	13	3
31-mai	12	4
30-mai	12	4
29-mai	14	3
28-mai	15	4
27-mai	14	5
26-mai	13	2
25-mai	4	1
24-mai	4	0
23-mai	6	1
22-mai	5	0
21-mai	5	1
20-mai	4	1



Source: Youtube as of June 20th

	Number of Views on YT	
	France.tv	Eurosport
9-juin	560977	161544
8-juin	98518	169458
7-juin	248103	103684
6-juin	196841	41043
5-juin	112005	4164
4-juin	245600	255679
3-juin	221703	37593
2-juin	147973	23504
1-juin	179324	19012
31-mai	213600	41173
30-mai	393462	19586
29-mai	1342286	43286
28-mai	1040226	7862
27-mai	839709	24001
26-mai	461631	11173
25-mai	68331	6306
24-mai	297112	0
23-mai	128668	8049
22-mai	145117	0
21-mai	44224	871
20-mai	84334	3061



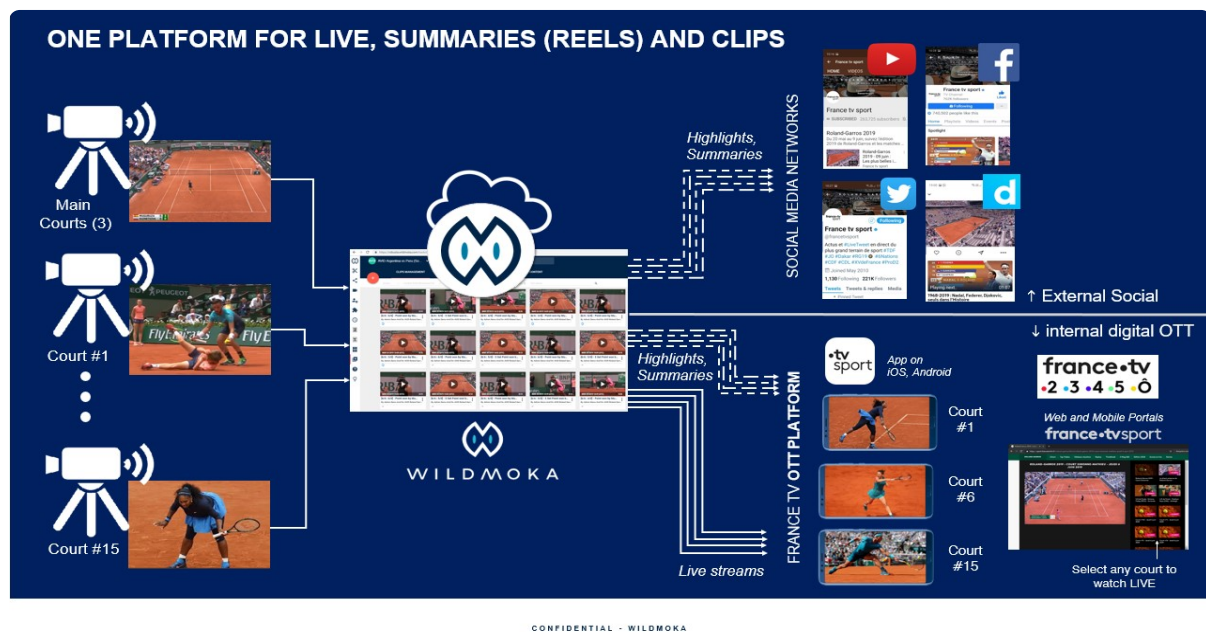
Source: Youtube as of June 20th

## How France tv used Wildmoka to boost viewer access to its content

France tv has long been an innovator in broadcasting and wanted to explore the possibility of giving their audiences even more choice and control over the content they watched. The French Open was a fantastic opportunity to do this, and so the leading French broadcaster, [following previous collaboration on the 2018 Tour-de-France](#), turned again to Wildmoka to support this year's Roland-Garros tournament.

Here's how France tv used Wildmoka during the 2019 French Open:

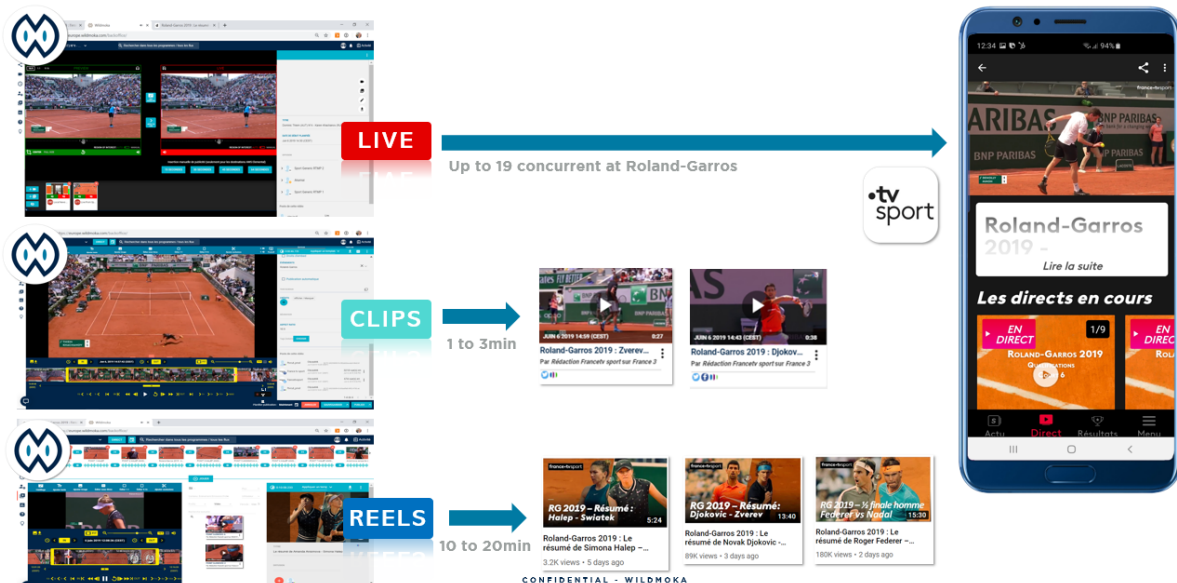
France tv acquired the rights to publish **every single match from every single court**. As a consequence, and as represented on the picture below, all the streams of all tennis courts were concurrently ingested by the Wildmoka cloud-based platform before being pushed to different digital endpoints (whether internal OTT platform or social media) in a different format (live, clips, summaries).



Thanks to the Wildmoka platform, France tv's editors could create three different types of content from a single web-based edition tool:

1. **Content type 1: Live streams** sent to France tv's existing CDN and players to serve the internal OTT App and web portals for viewers to watch the game live.
2. **Content type 2: Clips/highlights** to extract the best points of the games to be seen mostly on social networks and to be used to create reels for game summaries
3. **Content type 3: Reels /mashups** to create excellent match summaries (or teasers for upcoming matches). The match summary type of content typically last between 10 to 20 minutes - which has the double benefit of being both Facebook-friendly for mid-roll insertion, and being appreciated by tennis fans.

## LIVE - CLIPS - REELS FROM A SINGLE EDITOR



## Adapt to the new model and give audiences control

In this white paper, we have established that there is a new model for broadcasting sports tournaments such as tennis championships, the Olympics, World Cup games, or endurance races. Unlike the old system, which saw broadcasters selecting what viewers would watch, the new system gives users control, so they can choose what to see and when.

This new way of doing things for broadcasters represents a major shift and opens up incredible opportunities for how people consume live sports entertainment, while also introducing exciting new opportunities for advertisers and brands.

As the case of Roland-Garros 2019 has shown, this new model has impressive results for audience engagement and advertising reach. By using Wildmoka to distribute large amounts of content to multiple channels fast, broadcasters, audiences, sports stars, and advertisers all benefit.

To learn how you too can unleash the power of your next live broadcast event using Wildmoka, book a friendly and informative, [no-strings-attached consultation session](#) with a Wildmoka expert today.

[REQUEST A CONSULTATION](#)





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