

14 March 2019
Lausanne, Switzerland

2018 World Rowing Television and Video Streaming Report

This is the 2018 update on World Rowing's television and video streaming impact. This strategy, adopted in 2010, called for the creation of a well-structured and dedicated professional resource that was asked to deliver improved and more consistent host television productions, greater coverage and a wider distribution of World Rowing's programming around the world.



This report provides detailed information up to the end of 2018 on the television and digital coverage that World Rowing's events attracted globally.

Three elements of 2018 are key for this update:

Multi-Sport European Championships: All five of the major televised World Rowing regattas took place in Europe during 2018 but Rowing was integrated in the inaugural European Championships, a new, multi-sport event which is to be held every four years and which replaced the stand-alone European Rowing Championships. In 2018, there were two host cities: Berlin and Glasgow, with Rowing being staged on the Strathclyde course in Glasgow, Scotland. The broadcast partner was the European Broadcasting Union (EBU) whose primary objective of uniting seven sports into one European Championships combined broadcast was to generate increased television coverage for each sport through the principle of aggregation on the same week as the Olympic Games, two years later. This presumed that the combining of multiple sports into one event would result in synergies for production costs with increased interest, coverage and audiences than could otherwise be achieved for each individual sport. The European rowing federations showed great support for this initiative in the knowledge that the change of dates to August from the normal (May) slot caused some inconvenience. The results are presented later in this document.

TV at the Coastal Rowing Championships: Also in 2018, the World Rowing Coastal Championships regatta was filmed professionally for the first time with a High Definition Television production. This event was staged in Victoria B.C., Canada in beautiful conditions and was filmed by World Rowing Productions for global television partners and live-streaming on WorldRowing.com.

Multiple Digital Media Platforms: 2018 was the second year of the agreement with the EBU which improves FISA's ability to more effectively exploit digital media by means of live video streaming and video-on-demand (VOD) as well as with short social media clips across all World Rowing digital channels. These rights which are delivered over the Internet are now included in what is known as OTT (over-the-top rights). To be effective across this new means of consuming content by younger viewers, interesting and relevant photo and short video content must be constantly delivered to all social media platforms (Facebook, Twitter, Instagram, etc). This enables that content to be consumed wherever those fans are - because many no longer sit in front of a television. This report tracks and describes the good progress World Rowing continued to make in the digital area.

1. **Host TV productions for our World & European Rowing events**

- a. **Drones:** The first point to mention is that FISA offered to provide a flying drone camera free of charge to all our televised regattas. This drone camera would be in addition to the cameras installed by the host broadcaster and would deliver new and interesting angles that are not normally seen in rowing. It would be operated by a team recruited by World Rowing Productions and directed by our Executive Producer in cooperation with the host broadcaster. All but two of our venues granted us permission to fly the drone (Belgrade and Glasgow could not because of local regulations).
- b. **World Rowing Cup Regattas:** The World Rowing season again started in Belgrade, Serbia, with World Rowing Cup regatta I. As for 2017, this was host-produced by RTS, Serbia's national broadcasting company with support from World Rowing Productions and the Serbian Rowing Federation. The season then moved to Linz-Ottensheim in Austria which was also a test-event for the 2019 World Rowing Championships. Our production partner in Austria was ORF, the national broadcaster and we enjoyed a first-rate collaboration on the host production and well as receiving, for the first time, full live coverage in Austria of a World Cup regatta for both Saturday and Sunday. The third World Rowing Cup regatta was staged at its "traditional" home in Lucerne, Switzerland. Again, this regatta also acted as a test event for Swiss television (SRG) for next year's European Rowing Championships.
- c. **Multi-sport European Championships:** As already mentioned, the 2018 European Rowing Championships in Glasgow, Scotland was integrated into the seven-sport European Championships, together with Athletics, Aquatics, Triathlon, Golf, Artistic Gymnastics and Cycling. The EBU appointed World Rowing Productions to host produce the rowing regatta and we delivered 4 days of live coverage from the first heat to the last A final (instead of the usual one day of A Finals).
- d. **World Rowing Championships:** Our largest televised event was the World Rowing Championships in Plovdiv, Bulgaria. The first four days of heats, repechages and quarter-finals was host-produced by World Rowing Productions in order that FISA could deliver a live-streaming signal to its global audience. The Bulgarian national television (BNT) was the host broadcaster along with the support provided by World Rowing's Television Executive Producer.
- e. **Coastal Rowing Championships:** Our season ended with the 2018 World Rowing Coastal Championships which was host-produced by our World Rowing Productions team (also with Swiss Timing's TV graphics). Our objective was to not only film the racing for a live Internet audience but also to generate enough good content to post-produce a short video that would help us promote Coastal Rowing as an exciting "adventurous" and more extreme member of the rowing family - see this link: <http://www.worldrowing.com/photos-videos/videos/coastal-rowing>. The experience has prepared us very well for our two Coastal events in 2019 that will also be filmed by our production team.

2. World Rowing Broadcast Rights Holders

World Rowing's long-term strategy is to increase the global coverage and promotion of rowing, and this continued very effectively in 2018.

In Europe (via EBU), agreements were reached with national broadcasters ORF in Austria and BNT in Bulgaria to enable coverage of the two World Rowing events to be seen on television in those countries. As well, RTE in Ireland continued as a new rights holder thanks to the continued success of the (now quite famous) O'Donovan Brothers in the LM2x.

Outside Europe, the existing agreement with CCTV Sports in China was extended. This is particularly important because the 2021 World Rowing Championships will be held in Shanghai and the Chinese Rowing Association (CRA) already has plans to develop several new rowing events in that country to build on the promotion and exposure of rowing that the Championships will bring.

- a. **Rights-holding Broadcasters within Europe (in 2018):** The following are the European channels that were either rights holders in 2018 for all World Rowing events or for specific events (for the World Championships, marked with an *, for the "multi-sport" European Championships with **, with **, and for a specific World Cup regatta with ***.

Country	Channel	Country	Channel
Austria	ORF ***	Belgium	RTBF** & VRT**
Bulgaria	BNT * and **	Croatia	HRT
Cyprus	CYBC **	Czech Republic	CT/CT Sport
Denmark	TV2 & DR **	Estonia	ERR
Finland	YLE **	France	L'Equipe & FTV **
Germany	ARD & ZDF	Great Britain	BBC
Hungary	MTVA *	Ireland	RTE * and **
Italy	RAI	Lithuania	LRT
Netherlands	NOS	Norway	NRK **
Poland	TVP	Romania	TVR **
Russia	MATCH TV	Serbia	RTS***
Slovenia	RTV **	Spain	TVE **
Sweden	SVT **	Switzerland	SRG/SSR
Turkey	TRT **		
Pan Asia	Eurosport **	Pan Europe	Eurosport **

- b. **Rights Holders outside Europe (in 2018):** World Rowing's current Rights-holding broadcasters (for some or all events) are shown below. Unfortunately South American partners (DeporTV ARG and GloboSat BRA) did not renew but Fox Sports in Africa, which covers 54 nations (including S. Africa) on that continent and its outlying islands, has joined the other rights holders.

Country	Channel
Australia	FOX Sports (renewed until 2020)
Africa	FOX Sports
Canada	CBC (online streaming)
China	CCTV (renewed until 2024)
New Zealand	SKY NZ (renewal through to 2020 confirmed)
United States	NBC and The Olympic Channel USA

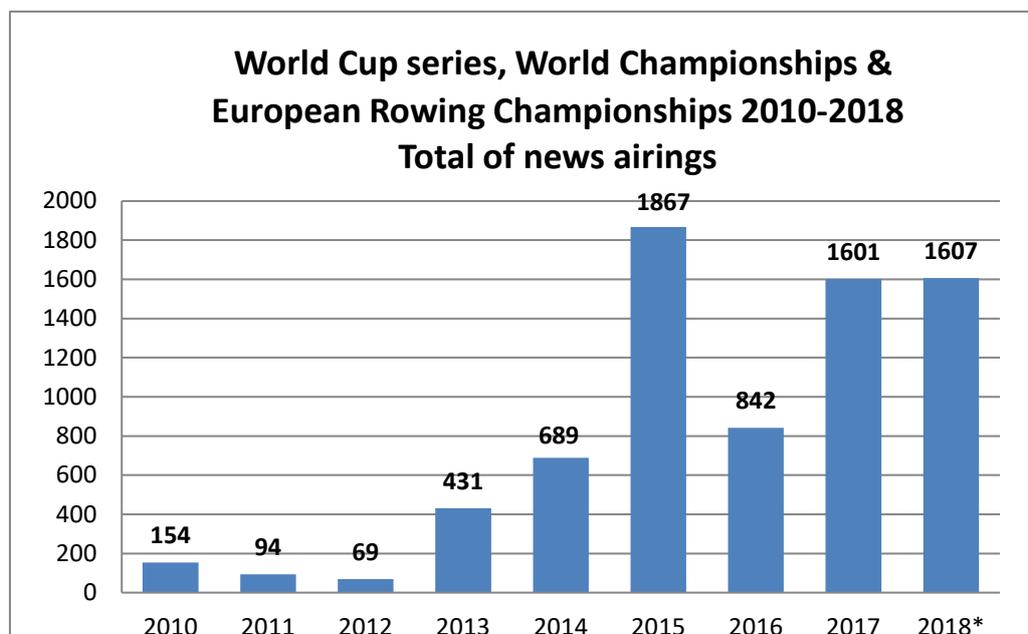
3. The World Rowing News Service

Throughout 2018, for all televised World and European Rowing regattas a unique (and free of charge) World Rowing News Service was offered to all rights-holding and non-rights-holding broadcasters (in the latter case after a short time embargo where a rights holder has exclusive rights in a certain territory).

For the televised days a one minute cut-down of every race that was filmed on that day is provided. This includes the start, race-action, finish and victory ceremony, as well as mother-tongue and English language interviews. The overall edit totals about 30 minutes of news footage and is always available within one or two hours after the last televised race.

Also on request, mother-tongue interviews with the national rowers are produced for right holders that cannot send their own film/interview crew to the regatta.

This initiative has been a remarkable success and is much-appreciated by all those that take advantage of it. After nearly doubling the number of news airings in 2017 over 2016, we levelled off in 2018 with 6 more news airings.



Comment

News airings have increased significantly since 2013 due to FISA's free News Service efforts. This has been further influenced by the continued global

development of rowing which resulted in 28 nations medalling at the 2018 World Championships, compared with 22 in 2013. The low figure in 2016 is because there was no World Rowing Championships that year. However, the 2018 figure of 1607 News views excludes those for the European Championships (because this information has not yet been provided) so, in reality, this figure should be considerably higher.

4. International News Agencies and Sport Compilation programmes

After each day of televised racing, World Rowing Productions provides a short three-minute News Summary (also free of charge) to a group of international sports video news agencies which include the EBU and SNTV. Through these agencies, rowing video-headlines now reach almost all parts of the world, via the Internet and to traditional television as well as tablets and mobile phones.

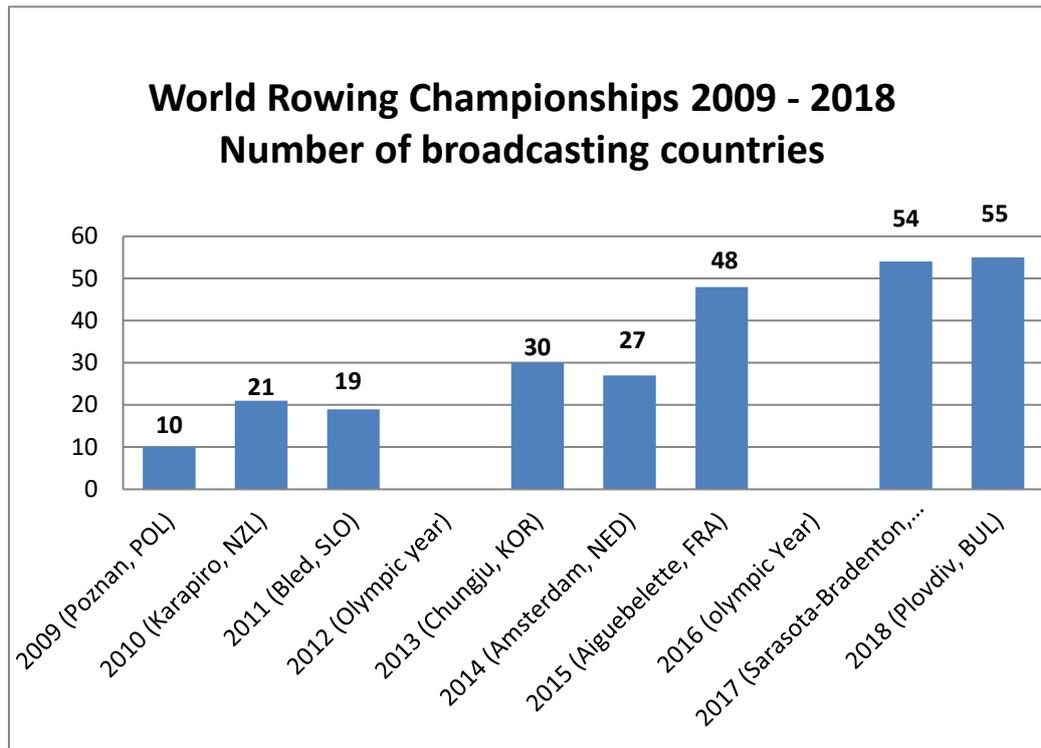
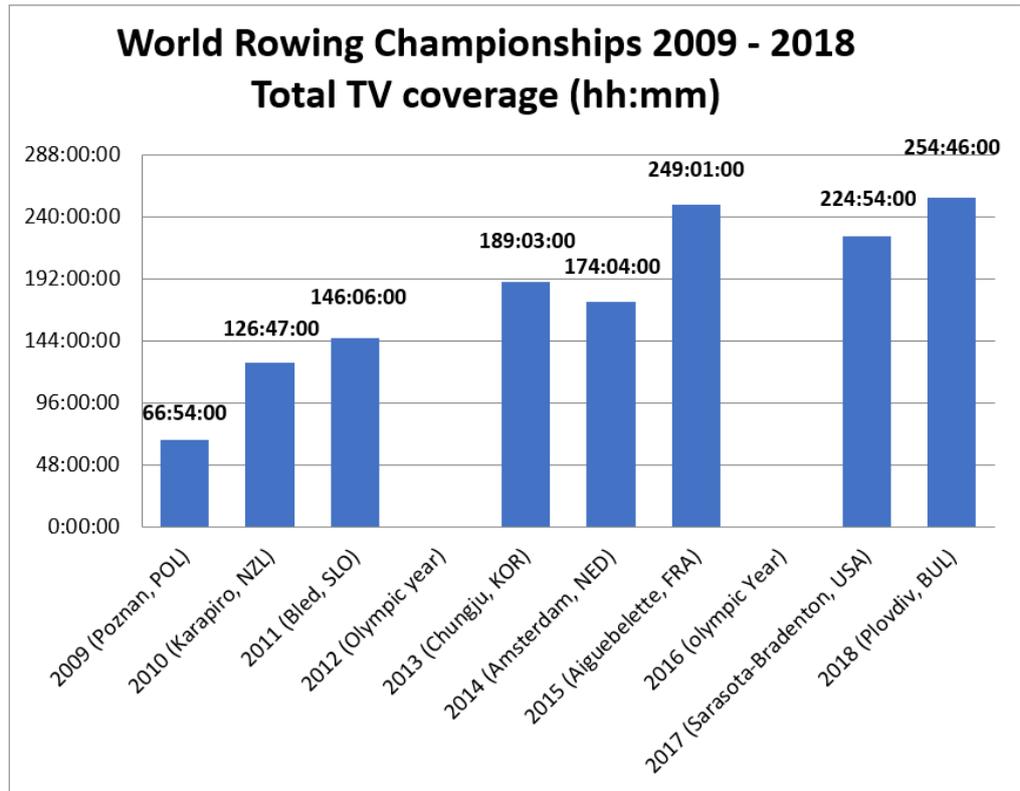
As well, summaries of the World Championships and the World Cup regattas prepared by FISA are also taken by Trans World Sport (which came on board in 2018) and this weekly programme has greatly extended the reach to new markets and audiences. This more than compensated the loss of the weekly Gillette World Of Sport which in 2018 moved from weekly to monthly and changed its focus toward features, instead of news edits, etc.

5. Total TV coverage from FISA's Major Events 2009 to 2018

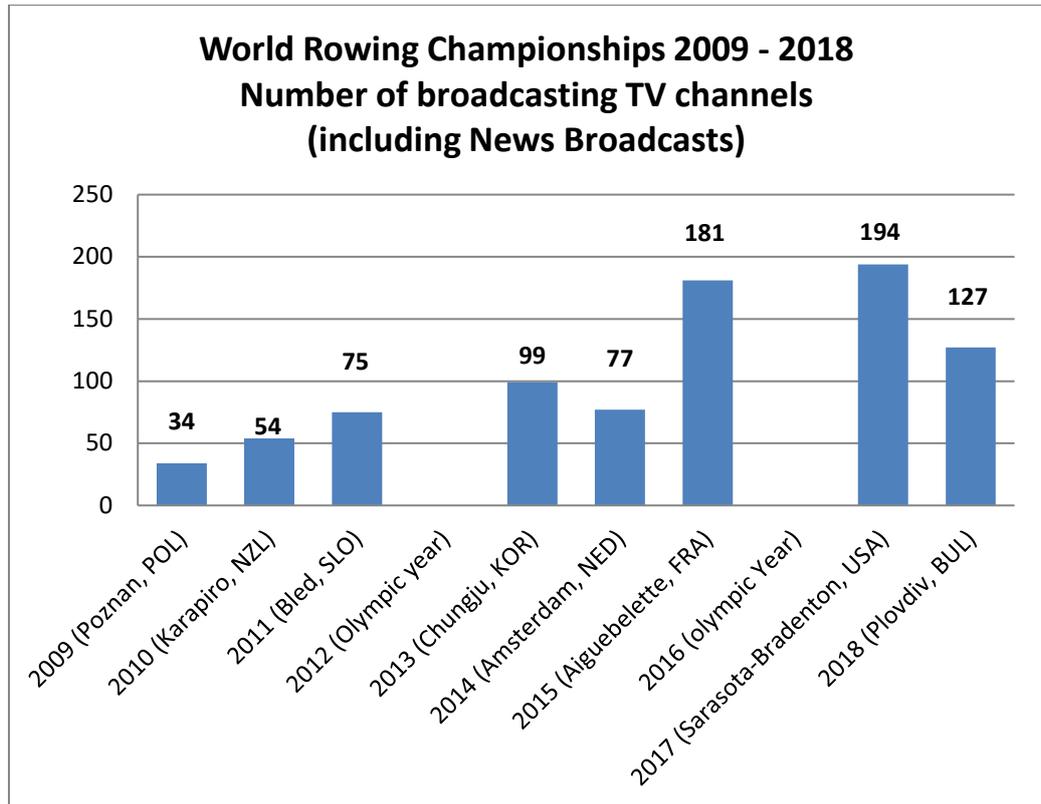
The following information - which covers the World and European Rowing Championships and the World Rowing Cup series from 2009 to 2018 - has been sourced from the individual broadcasters and compiled by the EBU and Quattro Media.

a. **World Rowing Championships:** At 254 hours, the total TV coverage in 2018 showed an increase of 30 hours over 2017 and is the greatest number of hours achieved so far. As well, this number can be compared favourably with the 2014 World Rowing Championships (174 hours) which was also in the middle of the Olympic cycle and on similar European timing.

The increase can be partly explained by the fact that several rights holders showed significantly more live and live-delayed/re-run coverage than in the past. For example, FOX Australia showed 47 hrs, Match TV in Russia - 30 hrs, BNT Bulgaria - 23 hrs, RAI Italy - 14 hours and TVP in Poland -12 hrs. But it is also due to the continued efforts of World Rowing Productions and the EBU's sales team that we continue to increase the coverage of our World Rowing Championships.



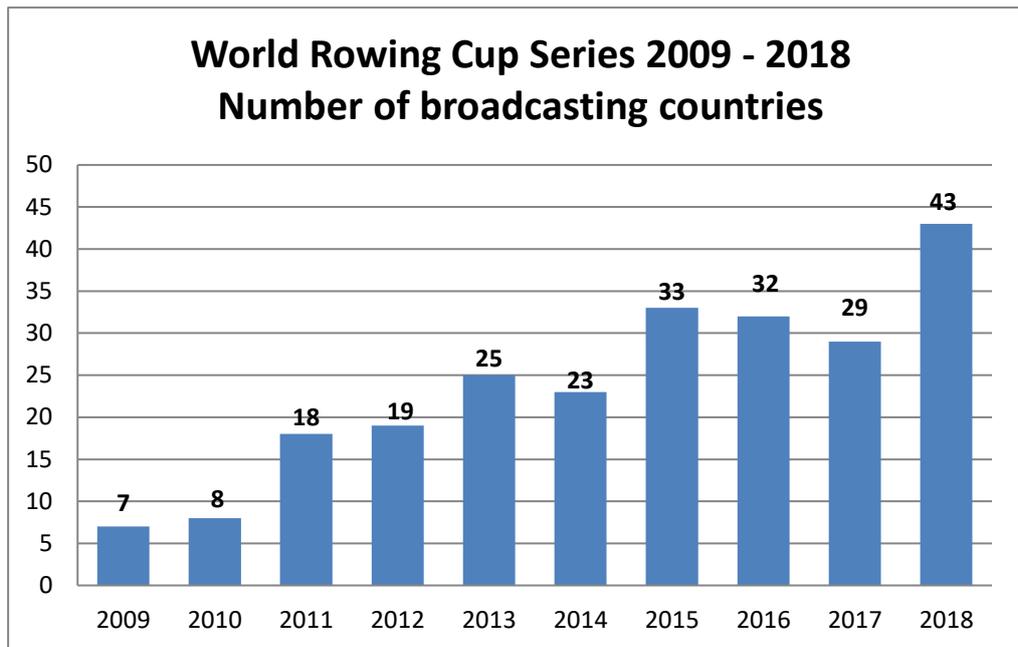
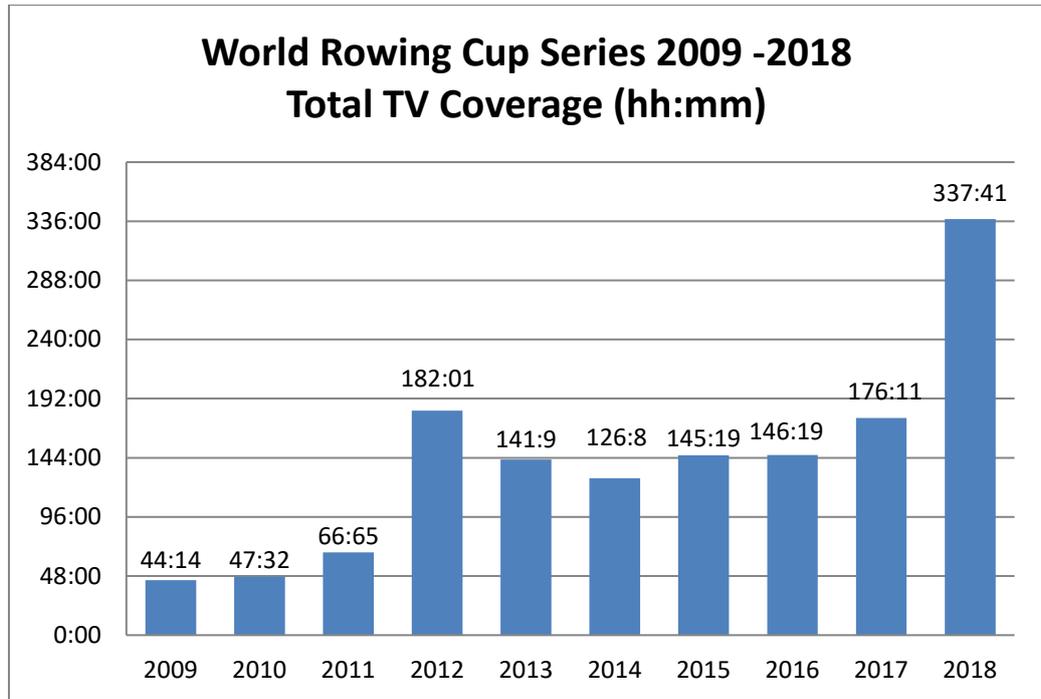
Comment: Note that the above graph excludes trans-national channels such as Fox Africa and Al Jazeera both of which cover multiple individual countries.



Comment: This drop from an all-time high in 2017 is partly due to the number of channels that took the News coverage in 2017 but it also reflects the loss of the Gillette World of Sport, as mentioned earlier. Even so, this was partly compensated by Trans World Sport and this figure is expected to recover in 2019, being pre-Olympic year as illustrated by the high 2015 figure from Aiguebelette.

- b. **World Rowing Cup regattas:** Overall, a significant increase was achieved in the total coverage of all three World Cup regattas compared with 2017.

In fact each single regatta generated more coverage than any previous World Cup regatta since 2009. For example, the Linz-Ottensheim regatta benefitted from 26 hours of coverage by ORF in Austria and the same amount by The Olympic Channel in the USA. And World Cup Regatta III in Lucerne achieved a record 138 hours which included 30 hours in Australia, 13 hours in Czech and 29 hrs in the USA). 2018 was a very successful year for the World Rowing Cup regattas.



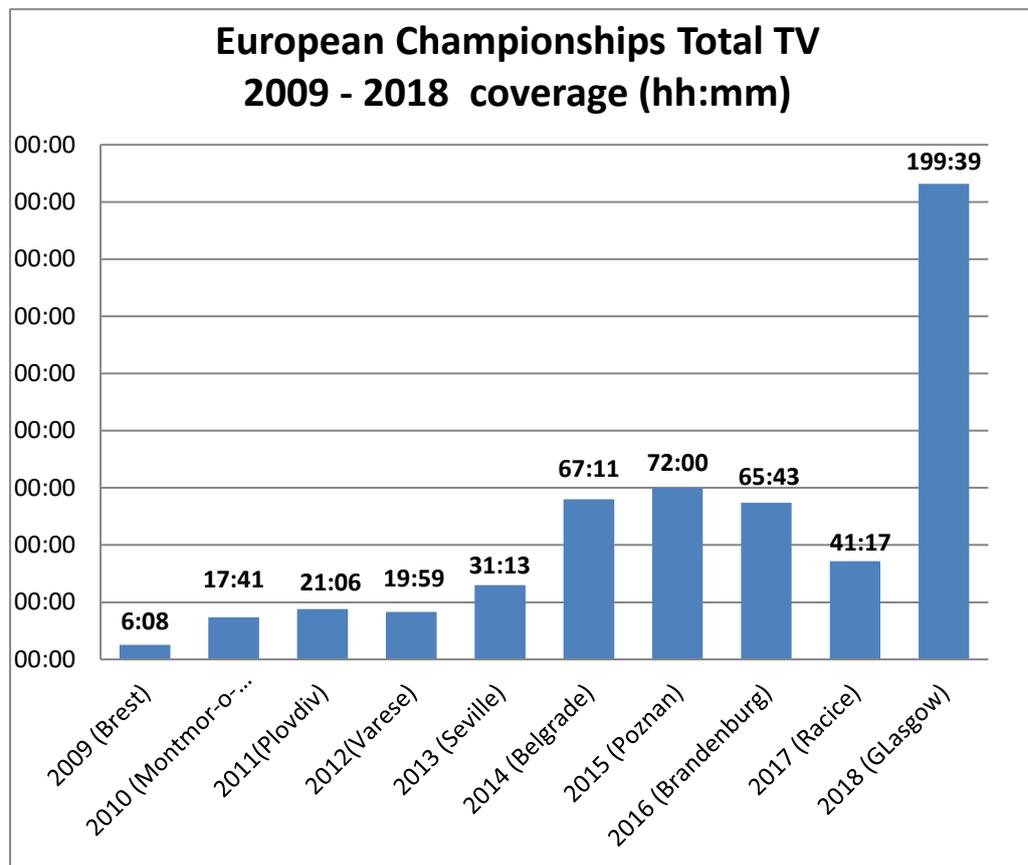
Comment: After a slight decline in 2017 (being the year of changes in crews and lower entries) a record number of countries covered the World Rowing Cup series in 2018. Most of this increase can be attributed to the inclusion of Trans World Sport as a new rights holder because it (unlike the Gillette World of Sport) covers the World Cup regattas. Note also that this graph excludes the trans-national channels that broadcast the news edits.

- c. **European Rowing Championships:** If any single graph could best-illustrate the positive impact on television coverage by aggregating

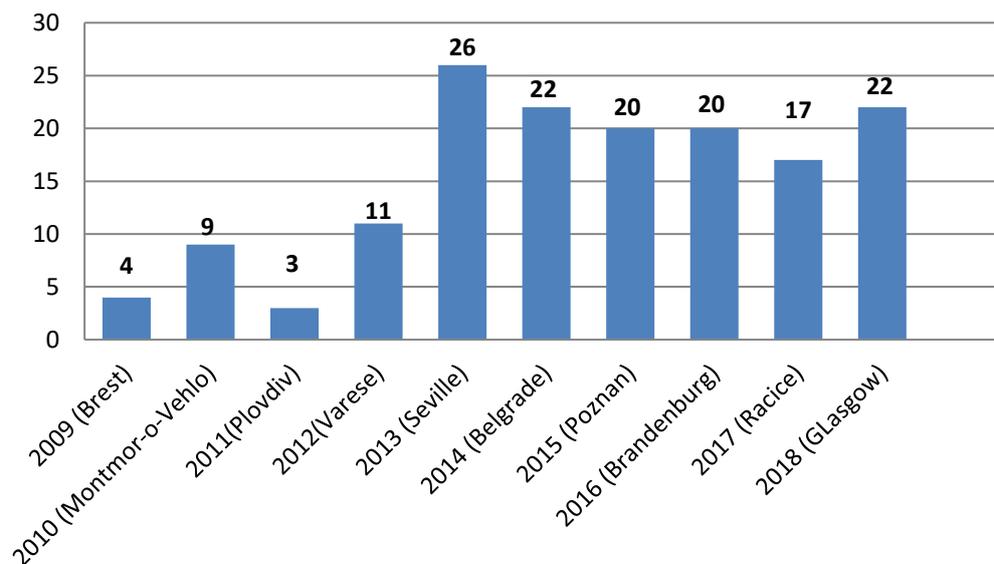
seven sports into one televised European Championships, it can be seen directly below.

Television coverage increased more than 400% over 2017 and nearly 300% more than the previous peak-coverage achieved in 2015. In addition to the increased live coverage there was a massive interest by national broadcasters using on-site news interview crews using their own cameras for interviews (ENG) - reaching up to 20 per day.

Many European member federations commented that the coverage in their countries was very strong and that many of their rowing fans commented positively. The next version of this multi-sport European Championships is being planned for 2022. More information on this will be provided in due course.



**European Rowing Championships
2009 - 2018
Number of countries that broadcast
(excluding Eurosport in 54 countries
& in 2018, Eurosport Asia in 9 countries)**



Comment: The same explanation for the increased total coverage of this European Championships can be applied to the increased number of countries in Europe (plus those covered by the two pan-continental Eurosport channels).

d. Countries with a World Rowing Broadcast Rights-holder

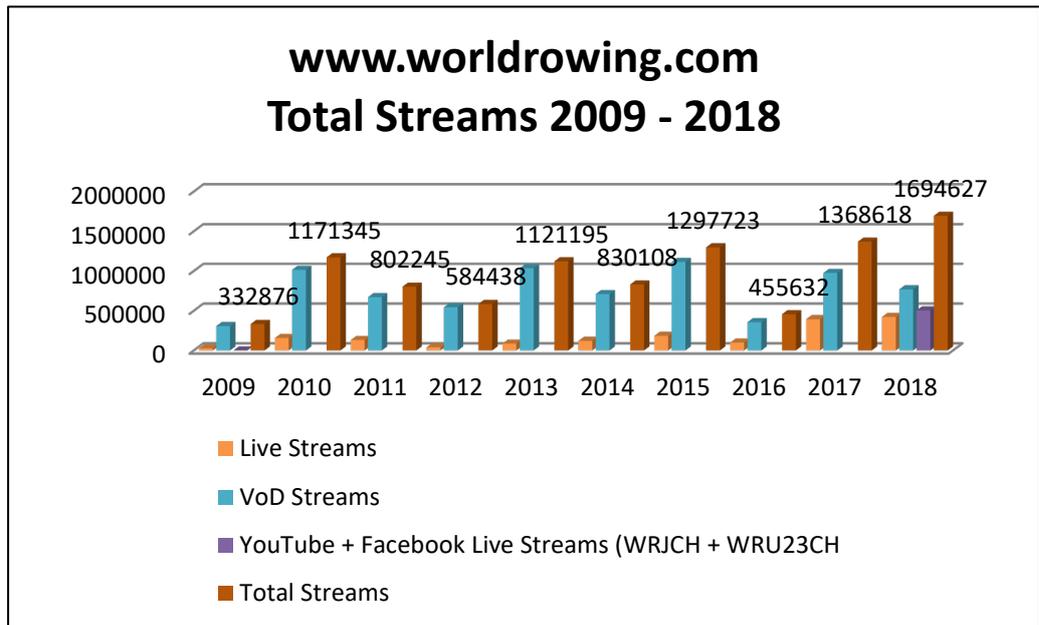
For those national federations in countries in which there was a contracted World Rowing Broadcast Rights holder in 2018 (see point 2 above), a summary of the TV coverage statistics that have been received for the World/European Rowing events in 2018 is available and can be forwarded separately, upon request.

e. Live Video Streaming and Video-on-Demand (VoD)

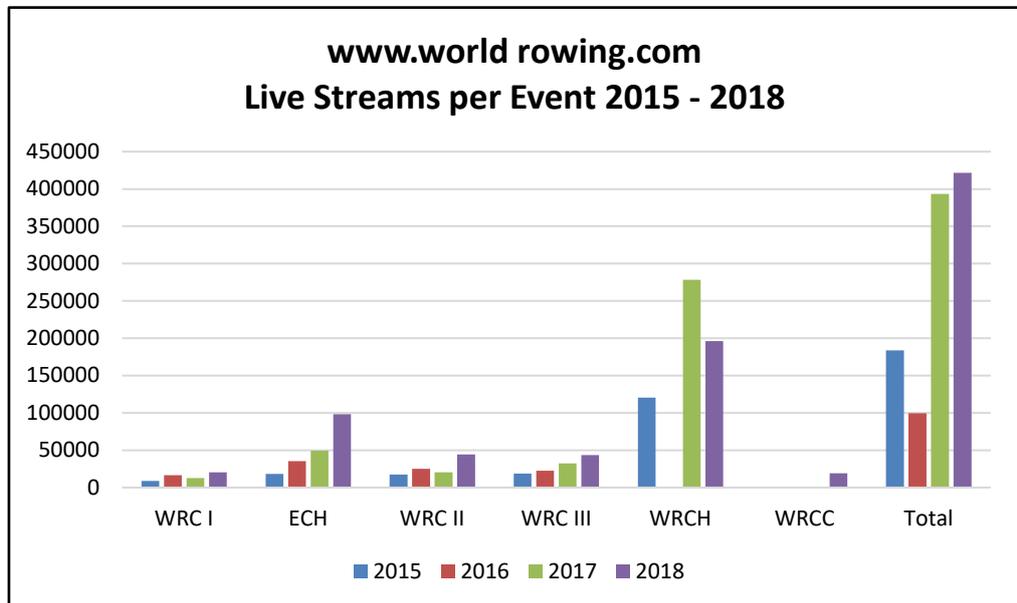
Since 2014, World Rowing has provided live streaming on the World Rowing website which can be accessed almost everywhere in the world. World Rowing's regular team of commentators travels to each televised regatta to provide expert live racing commentary for live-streaming and this remains for the post-live, VoD service.

This same live video commentary is taken by broadcast partners in Canada (CBC), New Zealand (SKY), Australia (FOX), Africa (FOX), the Olympic Channel and NBC's linear and streaming channels in the US.

Immediately after the live streaming, the videos are cut into individual race “clips” and these remain available, on-demand on the website - at no cost.



Comment: Total Video Streams continued to have a strong upward growth in 2018. As in 2017, this was influenced by the decision to live-stream all eight days of the World Championships, not just the last four days. As well, in 2018 all days of the WRJCH and the WRU23CH were live video streamed (together, these reached an accumulated amount of 503,953 views) plus the Coastal Rowing Championships.



Comment: The figures in the above graph only include streams from the World Rowing website. Note that the ECH figures in 2018 are notably high – but this is because it was impossible for us to separate the ECH and WRJCH views. Nonetheless it is certain that the majority of the views are from the ECH (estimated 70%). Additionally it was the first year that the WRCC were streamed onto the WR website so there are no previous statistics for this event for comparison. However, there was

a significant decrease in VoD streams of the WRCH because the first four days were not stored for VoD.

f. 2017 Video Streaming summary

The two “Top 10 countries” tables shown below identify the percentage of views of live video streaming and the Video on Demand library. It is interesting to note that in all of these countries, all five of the televised regattas can be seen live on the channels of FISA’s television rights holders, so it suggests that these figures are representative of the new demographic which includes younger fans who prefer to view their racing on mobile devices rather than on linear television.

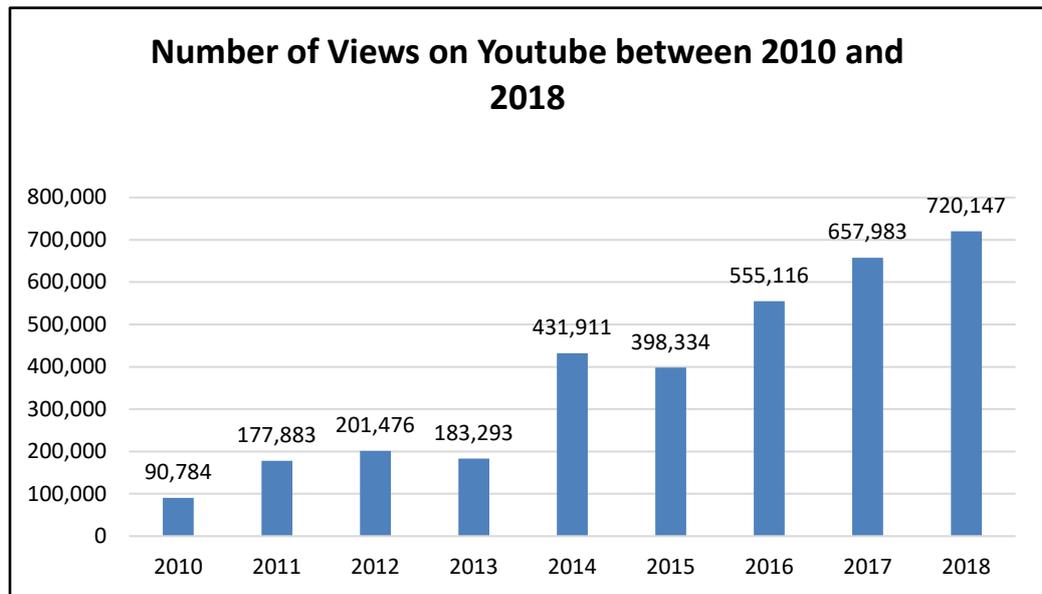
Top 10 Countries LIVE	
Germany	10.1%
France	8.1%
United Kingdom	7.7%
Netherlands	7.0%
United States	6.6%
Italy	5.3%
Australia	4.1%
Poland	2.5%
Switzerland	2.1%
New Zealand	2.0%

Top 10 Countries VoD	
USA	15.3%
UK	8.4%
Germany	7.6%
France	6.6%
Australia	6.0%
Netherlands	5.5%
Italy	5.1%
Canada	2.2%
Spain	1.3%
Ireland	1.2%

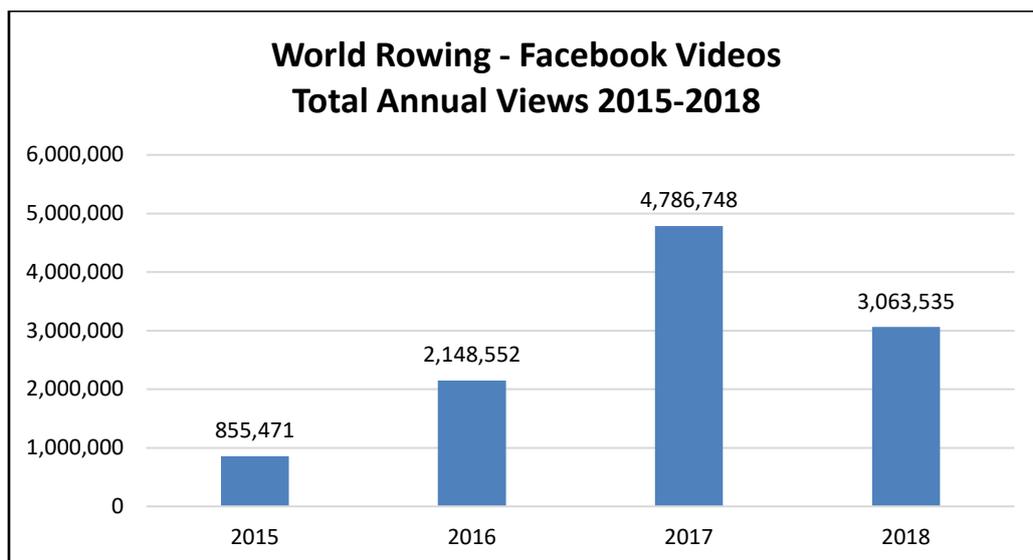
g. World Rowing YouTube and Facebook Platforms

YouTube is still the dominant video streaming platform available to the whole world (except China).

The “WorldRowingFISA” YouTube channel is constantly updated with interviews and profiles of rowers and rowing coaches as well as interesting and attractive videos about rowing, promotional clips for the events and features to assist training, coaching etc.. In 2018, 99 clips were uploaded (100 in 2017). Because the Racing Footage cannot be shown on YouTube (due to the exclusive geographical agreements with many television channels), it is testament to the quality of the video clips produced by FISA that the number of views are still steadily increasing.



Although Facebook is still a very powerful social media platform around the world, for the first time there has been a significant drop within Facebook video views compared to 2017. This is due to Facebook's new algorithm that promotes more interaction between family, friends, groups rather than pages. But there is also the other factor of Facebook’s controversies that occurred in 2017 and 2018, which has led many users (especially the younger ones) to leave the platform.



In addition to these “external” factors, the usual amount of content was not permitted during the 2018 European Rowing Championships because of access restrictions and this resulted in fewer videos being posted. As well the “Premium clips” that we created in 2018 were not all posted, thus enabling them to be posted during the early months of 2019. Despite these factors 174 clips were uploaded in 2018.

i. Other Digital platforms

In 2018, very good progress was made across the other World Rowing digital platforms.

- a. World Rowing’s **Twitter** followers increased from 40,000 to 42,000 and generated reached more than 6 million impressions.
- b. **Instagram** has been increasingly used not only for “nice photos or videos” but also as a very efficient communications tool through Instagram Stories. It continues to be the fastest-growing social media platform and is where there is an increasingly high number of young users. Instagram followers grew from 53,000 to 73,000 and generated more than 15 million impressions.
- c. Additionally, to address the ever-growing Chinese -speaking market, World Rowing has launched a **Weibo** social media account just before the 2018 World Rowing Championships in Plovdiv. As this is a very new platform we are seeing strong and continuous growth and expect this to increase further by working in partnership with the Chinese Rowing Association, WWF China, universities, rowing clubs and suppliers/manufacturers in that country.

j. Conclusion

The growth we have achieved in 2018 across all media platforms (except Facebook) is impressive. It demands a lot of time and work but, by creating and delivering fresh and engaging content that is relevant to all rowing fans – whatever their age or demographic – increased coverage and greater audiences has been achieved. And this in a world where up to 50% of viewing

is now from sources other than linear television.

Because of these changes in viewing habits, the focus has been more and more on producing content for short and “on-demand” viewing, while also ensuring that well-produced and high quality television productions of World Rowing regattas remains our highest primary.

FISA is fortunate to have loyal and robust broadcast partners, and able to benefit from their advice regarding the trends for which preparations and changes will be needed. Trends include the expected switch (within the foreseeable future) to OTT platforms which is receiving careful attention so that video moving-images continue to promote, develop and grow rowing in all its forms across all media platforms.

This information on television coverage that rowing is now achieving also is intended to help each National Federation demonstrate the media reach of the World Rowing events.

Special thanks go to all our media partners, including the European Broadcasting Union, its members, all our ex-European broadcast partners, our television services partner Quattro Media of Munich, Germany and FISA’s marketing and communications departments for these impressive results.