

29 January 2018
Lausanne, Switzerland

2017 World Rowing Television and Video Streaming Report

FISA is pleased to provide this 2017 update on the television and video streaming impact that continue to grow as a result of the television strategy we adopted in 2010. This strategy called for the creation of a well-structured and dedicated professional resource that has delivered improved and more consistent host TV productions, has led to a far greater amount of coverage and a wider distribution of rowing programming.



This report provides detailed information up to the end of 2017 on the television and digital coverage that rowing now attracts globally. We hope that this will be helpful to you in any discussions that you might have with your own media partners and existing or potential sponsors.

First, 2017 was the first year of our latest four-year agreement with the European Broadcasting Union (EBU). The EBU is the world's foremost alliance of public service media with 73 Members in 56 countries covering Europe and an additional 33 Associate members in Asia, Africa and the Americas. In reaching this agreement the EBU and an increasing number of its public service broadcaster members had committed to support rowing and improve not only the standard and quality of the host productions, but also our ability to exploit the increasingly important digital rights by means of news edits, live streaming and video-on-demand as well as social media clips. These rights which are delivered over the Internet are now included in what is known as OTT (over-the-top rights). This development is in recognition of the permanent change in how people consume video content such that more and more rowing fans are sourcing their rowing stories and short racing edits through their smartphones instead of watching live and highlight race footage on their televisions. This is not to say that television coverage of rowing is on the decrease or that FISA and the EBU consider it less important, because as you will see, coverage again increased both in our television results and digital coverage of rowing in 2017 over 2016. We are grateful to the EBU for their foresight and flexibility in enabling us to increase our focus on providing more interesting and engaging content via a contemporary system of delivery, whilst maintaining our strong position on traditional television as an Olympic sport.

Second, 2017 was not only the return to our established calendar of events including the World Rowing Championships but also the staging of this most important event in the United States of America. This led to a number of breakthroughs for our sport – not least our return to US television after we reached an agreement with NBC – the Olympic broadcast partner of the IOC in the USA.

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

The World Rowing season started in Belgrade, SRB, with the first World Rowing Cup regatta. 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 Racice CZE for the European Rowing Championships and a first-rate collaboration with Czech TV,

before continuing with World Rowing Cups II and III in Poznan, POL and Lucerne SUI which were host-produced by TVP and SRG respectively. Mostly, weather conditions were favourable and, in every case, the cooperation between the host-production team and the World Rowing Production team was excellent.

Our televised season ended with the World Rowing Championships in Sarasota-Bradenton, Florida, USA. All host-production related planning and the complete operation was handled directly by World Rowing Productions with appointed the television equipment company NEP as our US technical partner.

As well, new graphics and a flying drone camera were integrated into the production. The drone was operated under FISA's complete control so as to not disturb the athletes and ensure safety yet delivered stunning, new racing images with 360° angles that have not been seen before. Further and resulting from our new agreement with NBC, the Championships achieved 35 hours of US coverage from two (weekend) highlight programmes on NBCSN (NBC Sports Network) plus linear TV coverage as well as live video streaming of all eight days on NBC's "The Olympic Channel – Home of Team USA". All this, in addition to our own live streaming in the USA via worldrowing.com

2. World Rowing Broadcast Rights Holders

Our long-term strategy to increase the global coverage and promotion of rowing continued very effectively in 2017.

In Europe (via EBU) - although French TV's "FTV" eventually did not renew after 2016, they were immediately replaced by "L'Equipe TV" as our new, long-term rights-holder in France, through to 2020. As well, agreements were reached with HTV in Croatia, Match TV in Russia, RTE in Ireland, TVR in Romania, ERT in Greece and TVE in Spain

Another related situation was the sale by the IOC of the European Olympic television rights to Discovery Communications, new owner of Eurosport in Europe. Discovery undertook to then sell these rights on to EBU broadcasters but, at the time of our 2016 report, they had not agreed a deal with one of our important rights holders - the German state broadcasters ARD/ZDF. We were concerned that they would not show the 2020 Olympic Games and this would almost certainly have had a knock-on effect on the coverage of rowing in Germany. Fortunately, ARD and ZDF have now struck a deal with Discovery Communications for the right to show the Olympic Games from 2018 to 2024.

Outside Europe, we concluded a new agreement with " DeporTV " of Argentina and another with NBCSN to be our partners for the 2017 World Rowing Championships. We are already in contractual negotiation with NBC for the period 2018 – 2020 for all events.

And, as also reported last year, we entered into cooperation with the IOC's new Olympic Channel. This has proved to be a successful collaboration and they have live-streamed all our televised regattas in those territories which are not subject to exclusive rights-protection and have shown our clips and other rowing content, throughout the year.

a) Rights-holding Broadcasters within Europe (in 2017):

The following are the European channels that are either rightsholders for all World Rowing events or with which we have reached an agreement for specific events, such as the World and/or European Championships (these are marked with an *).

Country	Channel	Country	Channel
Bulgaria	BNT *	Croatia	HRT
Czech Republic	CT/CT Sport	Denmark	TV2
Estonia	ERR	France	L'EQUIPE
Germany	ARD & ZDF	Great Britain	BBC
Greece	ERT*	Hungary	MTVA*
Ireland	RTE*	Italy	RAI
Lithuania	LRT	Netherlands	NOS
Poland	TVP	Russia	MATCH TV
Serbia	RTS*	Switzerland	SRG/SSR

And, via the EBU, agreement has just been reached with ORF in Austria for certain events to be held in 2018 and 2019.

b) Rights Holders outside Europe (in 2017):

World Rowing's current Rights-holding broadcasters (for some or all events) are:

Country	Channel
Australia	FOX Sports (renewed until 2020)
Argentina	DeporTV*
Brazil	GloboSat
Canada	CBC (online streaming)
China	CCTV (renewed until 2020)
New Zealand	SKY NZ (renewal through to 2020 confirmed)
United States	NBC*

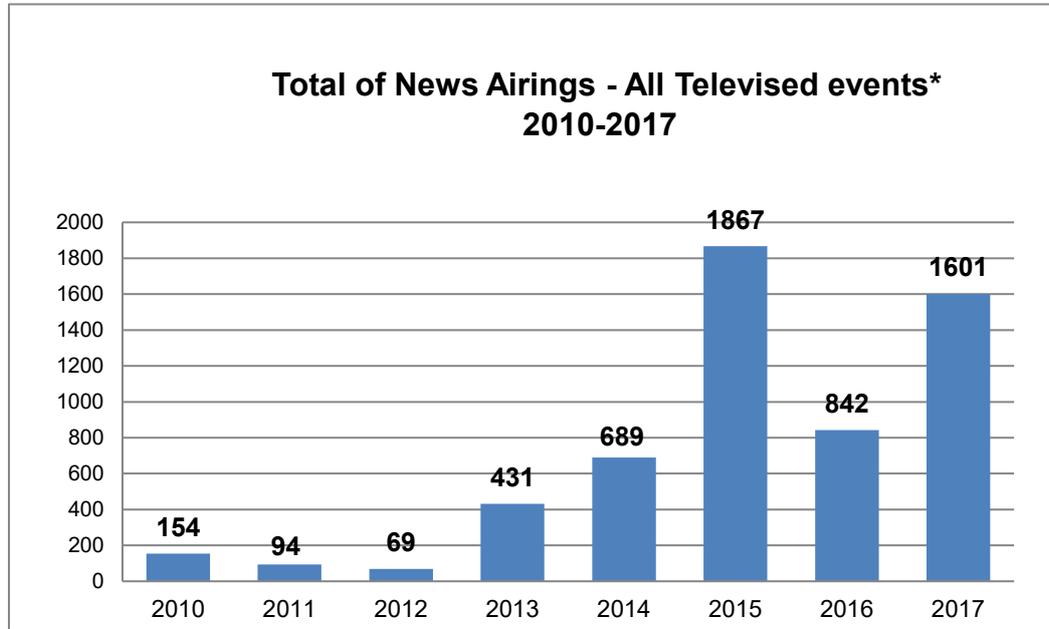
This updated list identifies the switch in Canada from Rogers Sportsnet to CBC's digital channel. And, at the end of 2017, we succeeded (after many years of trying) to conclude a 3-year deal in Africa for all our events - with Fox Sports (delivering sport 24/7 to the African territory, including RSA). We continue to seek a partner in both Japan and Korea as we lead up to Tokyo 2020.

3. The World Rowing News Service

For all televised World and European Rowing regattas we continued to offer in 2017 a unique (and free of charge) World Rowing News Service to all rights-holding broadcasters and non-rights-holding broadcasters. This 30-minute summary featuring the best races of the day includes the start, race-action, finish and victory ceremony, as well as mother-tongue and English language interviews. It is always available within three hours after the last televised race.

Also on request, we film and deliver mother-tongue interviews with the national rowers for right-holders that cannot send their own film/interview crew to the event.

This initiative has been a remarkable success and the number of news airings in 2017 nearly doubled those achieved in 2016. A secondary benefit is that the World Rowing News Service has increased interest in countries in which there is no rights-holder – such as X-Sport this year in UKR, which can sometimes lead to new and full, multi-year rights-holder agreements.



Comment

The significant increase of News airings since 2013 (also a post-Olympic year) is explained by the success of FISA's free News Service efforts. This has been further-boosted by the continued global development of rowing which resulted in 29 nations medalling at the 2017 World Championships, compared with 22 in 2013. The increase over 2016 is because there was no World Rowing Championships that year. However, the 2015 peak of 1,867 could not be matched because the 2017 Championships was affected by the six hour time difference between the USA and Central Europe, plus a slight drop in news airings which can be expected in a post-Olympic year.

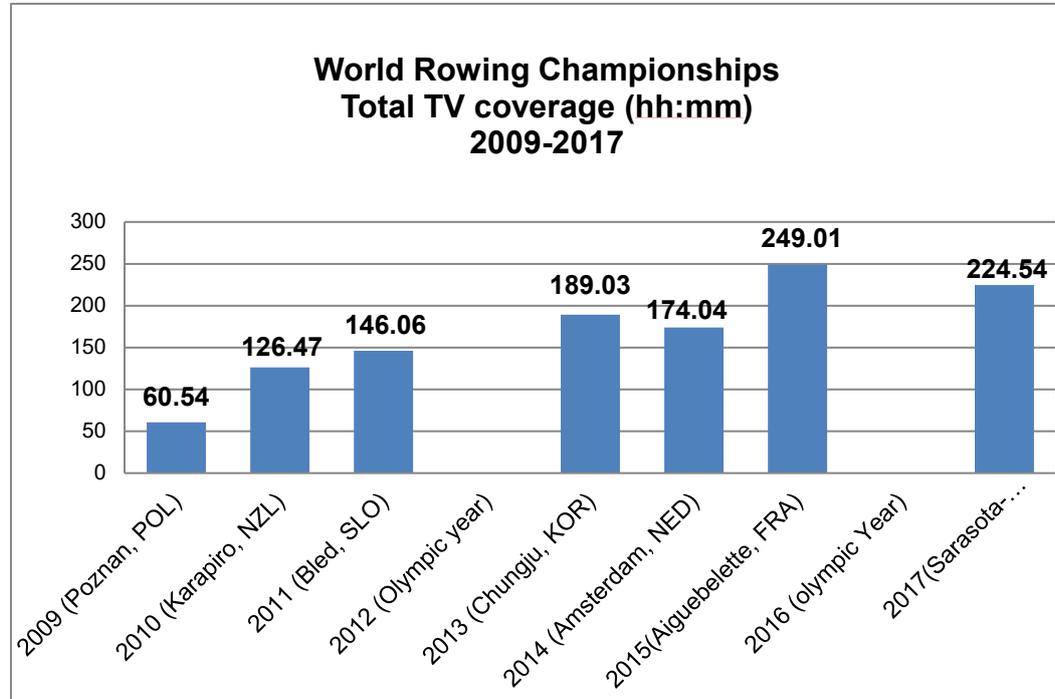
3. International News agencies

After each day of televised racing, World Rowing Productions provides a short three-minute News Summary, free of charge, to a group of international sports video news agencies which include the EBU, SNTV and Omnisport. Through these agencies, rowing video-headlines now reach almost all parts of the world, via the Internet, to traditional television as well as tablets and mobile phones. As well, our summary of the World Championships was also taken by Sports magazine programmes such as the Gillette World of Sport – which greatly extended the reach to new markets and audiences.

4. Total TV coverage from FISA's Major Events 2009 to 2017

The following information - which covers the World and European Rowing Championships and the World Rowing Cup series from 2009 to 2017 - has been sourced from the individual broadcasters and compiled by the EBU and Quattro Media.

- **World Rowing Championships**

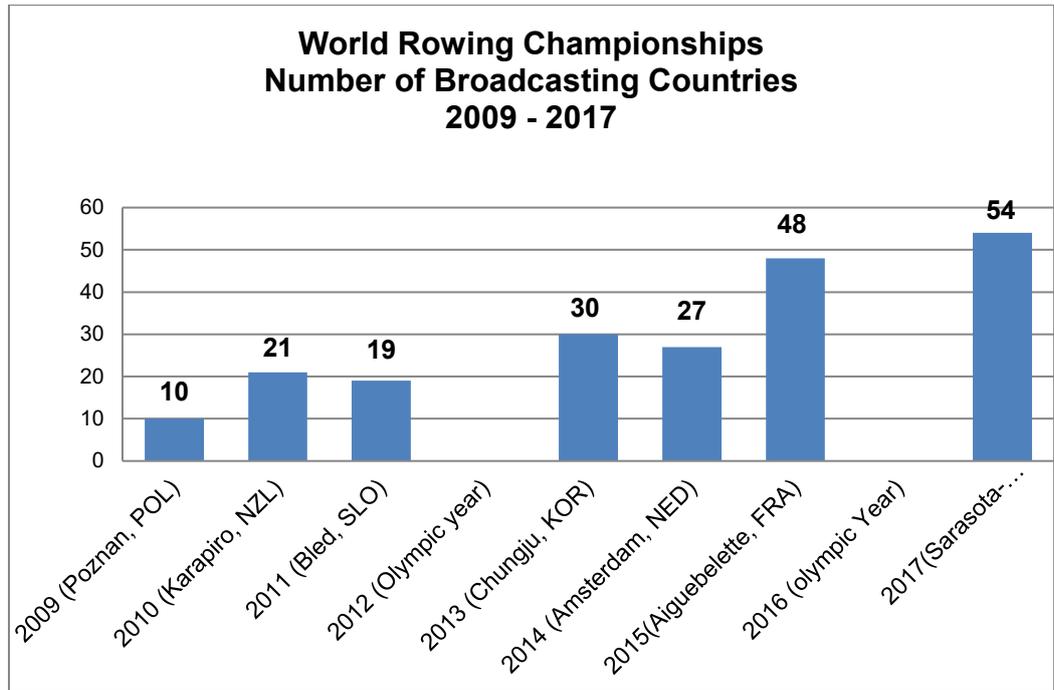


Comments:

The total TV coverage in 2017 increased 20% over 2013 (also a post-Olympic year).

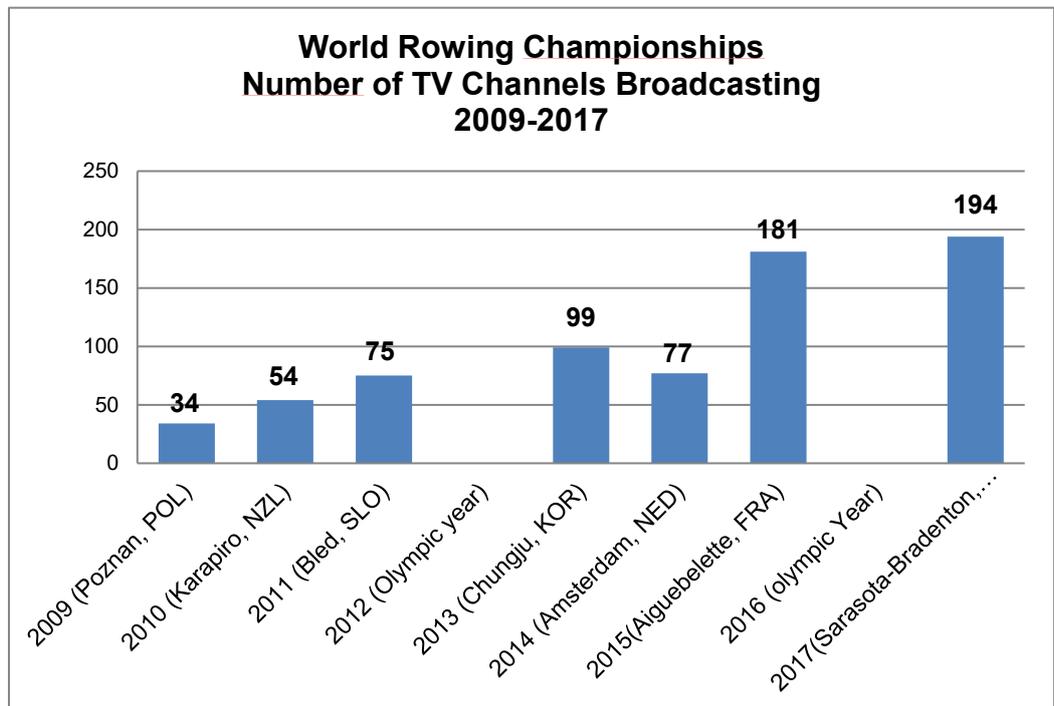
Because the 2017 World Championships were staged in the US, the live coverage broadcast times were much later in the day than is usual in Europe. This resulted in rowing having to compete with many other sports over the weekend and meant that the overall number of hours of coverage was slightly reduced from 2015. This was certainly the case in Germany, Bulgaria, Estonia, France, Hungary, Norway, Spain and Serbia.

On the other hand, the achievement of a rights agreement with NBC in the USA, plus a significant increase in the number of globally-reaching highlights and sports magazine programmes that included the WRCH, mostly mitigated that effect and in fact, we were able to increase the number of countries that were able to view the Championships.



Comments

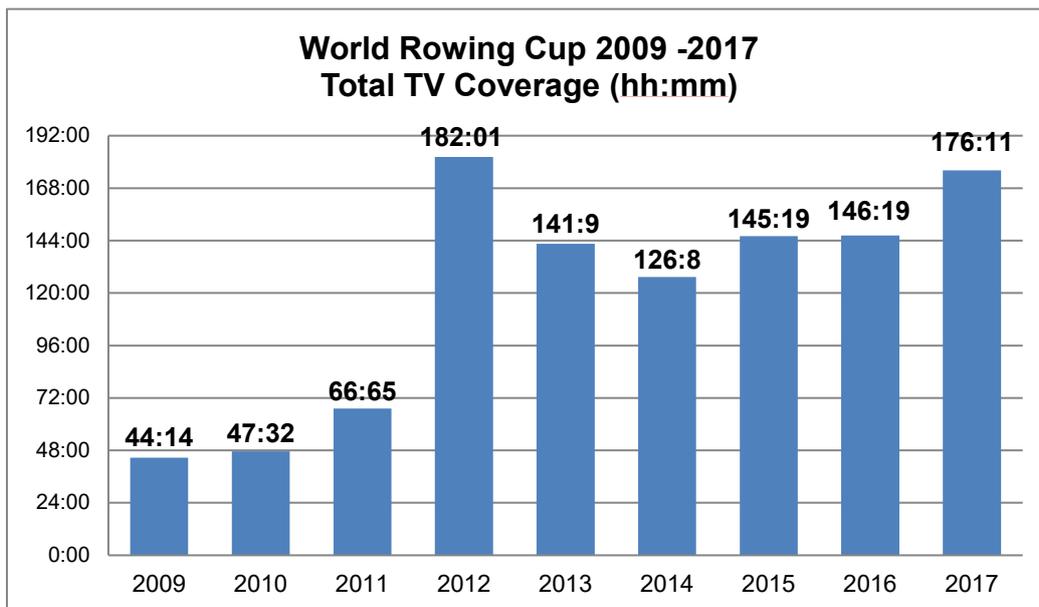
Due to the efforts of the World Rowing Productions team and EBU – in 2017 new live broadcasting agreements were signed with several new TV channels - also with the IOC's Olympic Channel for live global streaming over all 8 days of the Championships)



Comments -

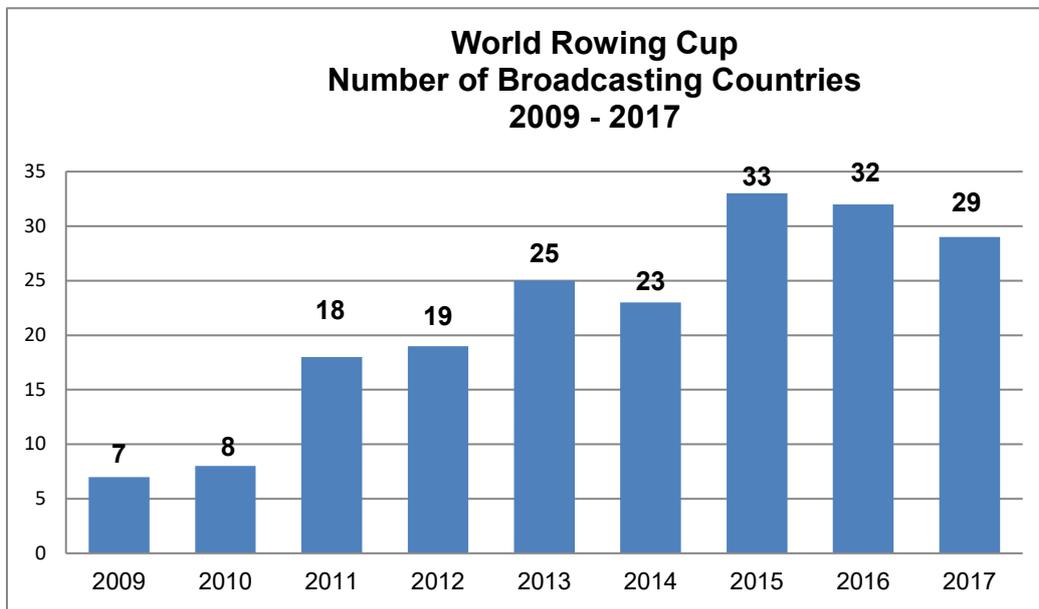
Due to the efforts of the World Rowing Productions team and EBU, new agreements were signed with several new channels increasing the number of countries we were able to reach via traditional television broadcasting.

• **World Rowing Cups**



Comment:

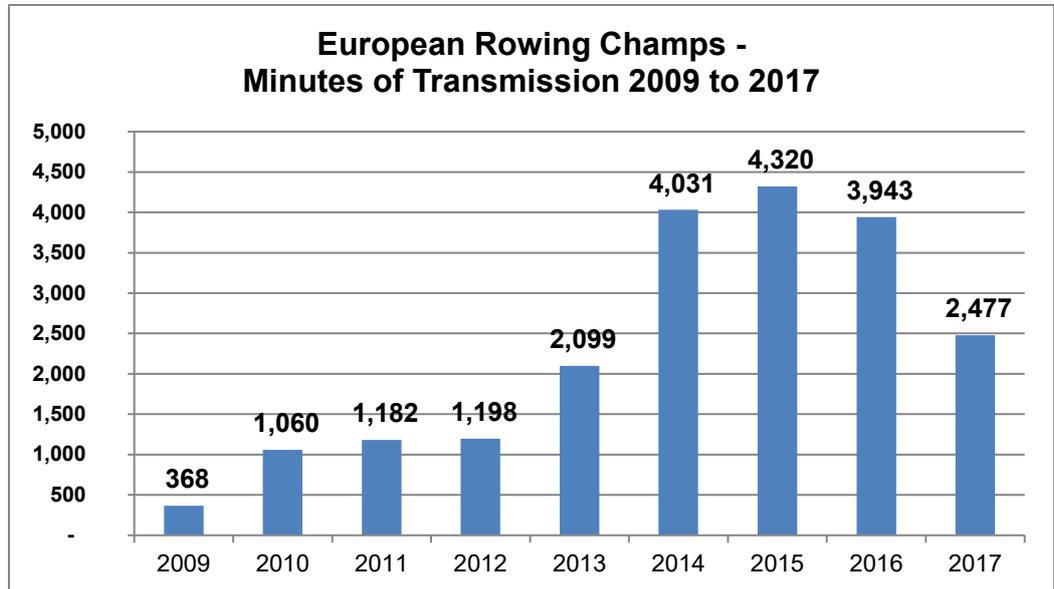
Overall, a good increase was achieved for the three World Cup regattas compared with 2016 – particularly in Lucerne which also acted for some countries as the final qualification regatta for the 2017 World Championships. This result can be compared very favourably with 2013 - also a post-Olympic year.



Comment

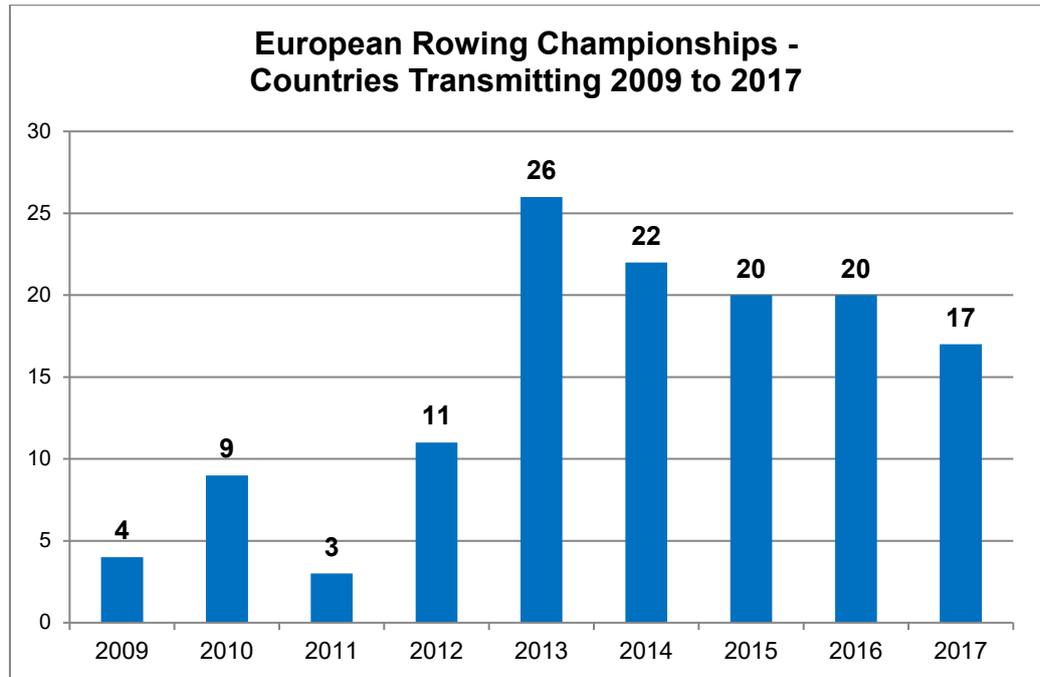
A slight decline in the post-Olympic year is mainly due to some previously-successful crews retiring and new crews forming. These factors had an effect on the countries which finished on the podium and thus the TV coverage in their home countries.

- **European Rowing Championships**



Comment:

As a direct result of the new ownership of Eurosport by Discovery (an EBU competitor) there was no Eurosport coverage in 2017 compared with over 4 hours achieved in 2016 and, we failed to get any TV coverage in Hungary and Norway. Most significantly, in 2016 there was (an exceptional) 10 hrs of coverage by Fox Sports in Australia but none at all in 2017. Looking ahead to 2018 (when rowing will be included in the multi-sport European Sports Championships in Glasgow) we foresee a return to a higher figure because rowing will be televised over 4 days and taken by Channels who are covering all seven sports – including rowing.



Comment:

The slight drop in 2017 against 2016 is explained under the previous graph. Again, there will be a multi-sport format in 2018 what should make a noticeable and positive difference.

5. Countries with a World Rowing Broadcast Rights-holder

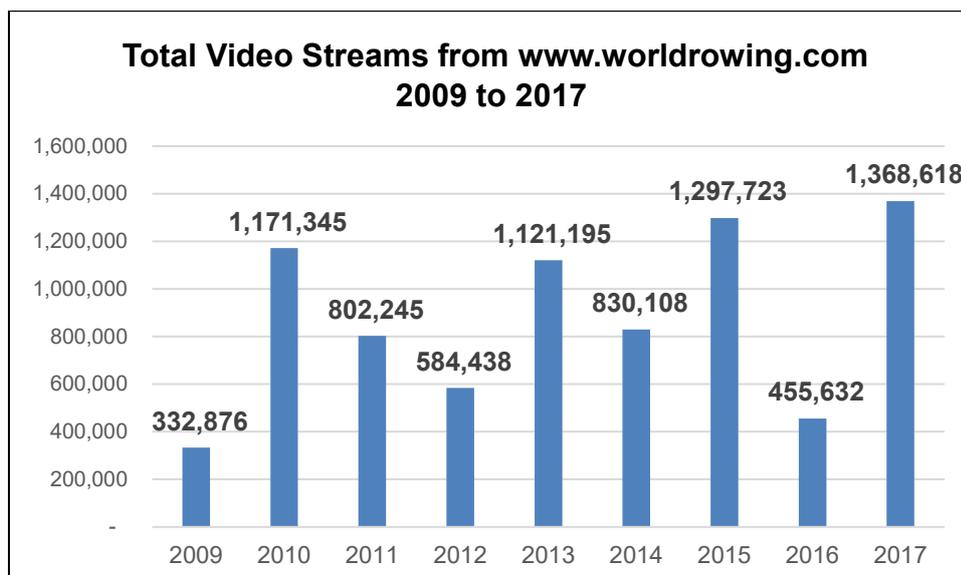
For those national federations in countries in which there was a contracted World Rowing Broadcast Rights holder in 2017 (see point 2 above), a summary of the TV coverage statistics that have been received for the World/European Rowing events in 2017 is available and can be forwarded separately, upon request.

6. Live Streaming and Video-on-Demand (VoD) on worldrowing.com

In 2014, World Rowing launched a new and considerably upgraded website. All televised races can be now seen LIVE on the website just about everywhere in the world. We have a team of commentators that travels to each televised regatta and they provide expert live racing commentary for our live-streaming and video-on-demand service. This is particularly useful to our rowing audiences in certain territories in which we do not presently have a rights-holder television channel.

And, in fact, this same live video commentary is used by our TV rights holders in Canada, New Zealand, Australia, the Olympic Channel and now NBC's linear and streaming channels in the US – and, for next year, on Fox Sports across Africa.

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



Comment:

Total Video Streams continued to have upward growth in 2017. This was particularly influenced by our decision to live-stream all eight days of the World Championships, not just the last four days. We might have expected an even greater increase in 2017's live streams but it also has to be expected that as we continue to expand our live coverage of rowing via traditional television as well as on other live global streaming channels (e.g. The IOC's new Olympic Channel), we are bound to lose some of our own viewers.

7. 2017 Video Streaming summary

The top 10 countries for video-impressions are shown below:

Country	Share of impressions
United States	15.8%
United Kingdom	9.3%
Germany	8.0%
France	6.6%
Netherlands	6.0%
Italy	5.1%
Australia	4.3%
Switzerland	3.0%
Canada	2.7%
Ireland	2.6%

Comment:

The USA share has increased noticeable (15.8% over 12.7% in 2016) and France has moved up one slot to take fourth. Japan has dropped out but Ireland has come in. These changes fairly obviously reflect interest in their

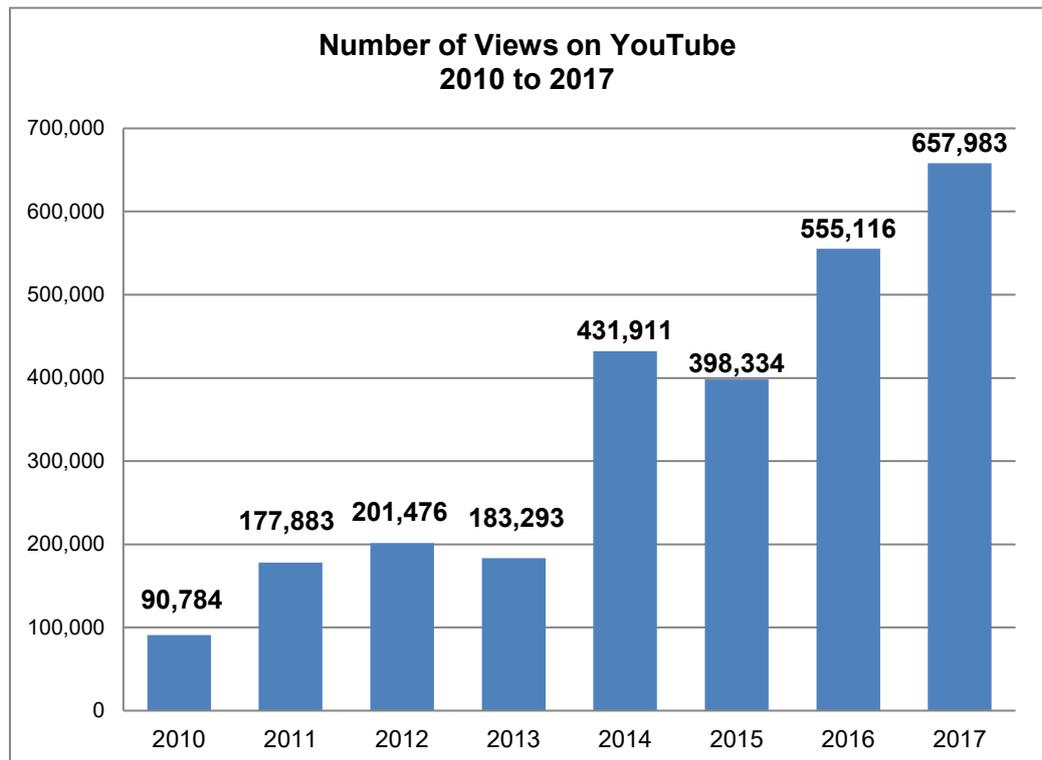
national crews.

8. World Rowing YouTube and Facebook Platforms

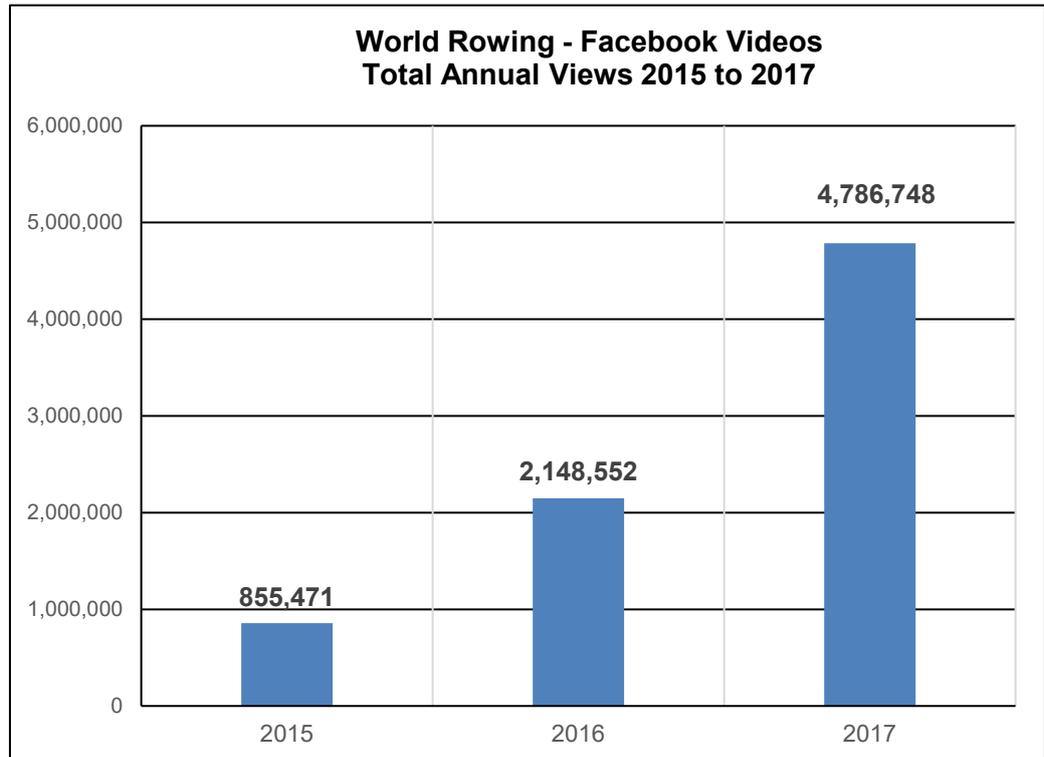
YouTube is a video streaming platform available to the whole world. The “WorldRowingFISA” channel (<https://www.youtube.com/user/WorldRowingFISA>) was created and is constantly updated with interviews and profiles of rowers and rowing coaches as well as interesting and attractive videos about our sport, promotional clips for our events and features to assist training, coaching and so on. Unfortunately, our territorially-exclusive contracts with individual television rights holders prevent us from showing rights-protected racing footage on this Internet platform.

In 2016, 22 videos were created during the season and uploaded to YouTube. Despite the small number of videos, the focus was on providing quality content and this generated a total of 555,116 views – which included a total of 135,264 views for the streaming of the 2016 World Rowing Senior, U23 and Junior Championships in Rotterdam.

In 2017, we continued to post the top-quality videos on YouTube as well as live-streaming some of our non-rights-protected events and conferences. The increase in number of streamed conferences and coaching videos meant that more than 100 videos were uploaded. The total number of views was almost 700,000; our best year yet.



Facebook continues to be a platform showing tremendous growth for video content, especially for highlights clips, athlete profiles, live interviews and behind-the-scenes footage – for example, we introduced a Facebook Live section featuring one of our commentators (Martin Cross) walking through the boat park filming and chatting with athletes, coaches and others of interest. Our Facebook videos reached nearly 5 million views, compared to 2 million in 2016. This is also thanks to some great cross-posted content from the Olympic Channel.



In addition to the nearly 5 million video views, the total reach on Facebook in 2017 was 35 million. This platform allows us to connect with our followers and push content to them as well as helping us to reach new followers.

10. Other Digital platforms

In 2017, we also made very good progress across our other World Rowing digital platforms: Our Twitter followers increased from 35,000 to 40,000 followers reaching more than 8 million impressions. Instagram continues to be the fastest-growing social media platform. It grew from 33,000 followers to over 50,000 followers in 2017 and generated more than 10 million impressions. We continue to use this platform to reach a younger audience. We have not yet expanded to other social media platforms in order to use our resources wisely and maintain quality and growth across our current platforms.

11. Conclusion

We are pleased with the continued growth across all media platforms that we have achieved in 2017. The promotion of Rowing worldwide is one of FISA's primary goals. By increasing and extending our television and on-line coverage each year, we are also helping to develop and help our sport grow in all its forms, in an inclusive and more accessible way. And, with the greater use of our OTT rights, we are connecting and engaging with new and clearly younger audiences in the way they now expect. We must remain alert to all developments in how content is delivered and viewed, while continuing to benefit from the substantial TV hours and audiences we can reach through the traditional means.

This information has been provided to you in order to provide an appreciation of how much television coverage our sport is now achieving and also to help each National Federation demonstrate the media reach of World Rowing. We will continue to report on an annual basis. If you feel that we should make contact with a television channel in your country then, subject to any existing contractual obligations to which we might already be committed, we will be very pleased to do so.

Thanks go to the European Broadcasting Union, its members, our ex-Europe broadcast partners, our television services partner Quattro Media of Munich, Germany and our marketing and communications departments for these impressive results.

Sincerely,



Jean-Christophe Rolland
President



Matt Smith
Executive Director