



Premier League highlights

- PREMIER LEAGUE
- FOOTBALL LEAGUE
- FOOTBALL
- EUROPEAN FOOTBALL
- HOCKEY
- TENNIS
- RUGBY
- GOLF
- CRICKET
- BASEBALL
- BASKETBALL
- ICE HOCKEY
- MMA
- BOXING
- CYCLING
- SWIMMING
- SKIING
- SKATEBOARDING
- SURFING
- VOLEYBALL
- WATER POLO
- WRESTLING
- YACHTING

# Sport and New Media Content Distribution and Monetisation

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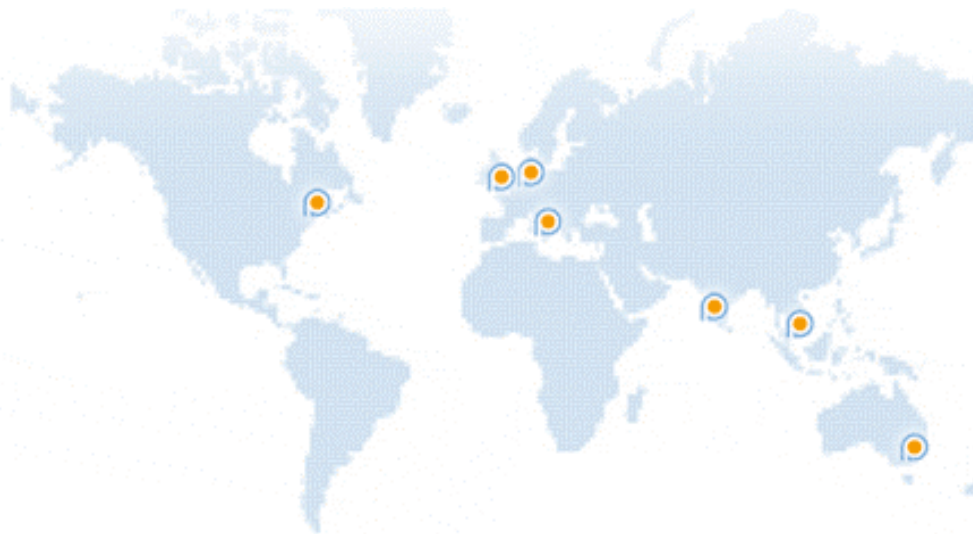
## Agenda

- Perform and digital media
- Market overview - trends and business models
- Digital marketing
- Examples/case studies

# Who We Are



- Founded in 1999
- 300 staff dedicated solely to digital media, based in state-of-the-art digital facility
- Live streaming of 13,000+ live sporting events per year
- HQ in the UK, with offices in Singapore, Australia, Italy, USA, Holland and India



## Over the past 12 months, Perform has:

- Managed and supported over 260 sports digital properties
- Streamed over 13,000 live sports events and delivered over 600,000 unique VOD clips
- Produced over 60,000 hours of content
- Managed over 140,000 online subscribers
- Handled an average of 20m unique users and served 160m page impressions each month across our network

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# What We Do



## COMPLETE DIGITAL SOLUTION

### PRODUCTION

Live or on-demand sport ingest via satellite, BT Tower, Tape or FTP  
Multi-media MCR (Feed Management)  
Encoding and publishing

#### Post Production

- Voiceover
- Highlights Editing

#### Editorial Feeds

- Video and Meta-Data Feeds
- Data Feeds

### DIGITAL DESIGN

Design Consultancy  
Website Conception  
Wire Frame Development  
Website Creative Execution  
Website Design  
Creative Flash Programming

### REVENUES

Customer Acquisition

Customer Retention  
(churn management)

Subscriptions

Billing & Authentication  
Management

3rd Party Global  
New Media Rights  
Sub-licensing

Online Advertising Sales

Online Sponsorship  
Sales

Traffic Generation  
Pay Per View

### ADVERTISING & SPONSORSHIP

Display Sales  
Online Video Sales  
Digital Sponsorship Sales  
Ad Funded Programming

### TECHNOLOGY

Website Technology Platform

- Content Management System
- Hosting

Video Streaming Platform

- Live Streaming
- On-Demand Streaming
- Subscriber Management
- Pay Per View
- DRM
- Embeddable Flash Media Player

### WEBSITE & CONTENT



### COMMERCIAL

### DIGITAL MARKETING

Search Engine Optimisation  
Affiliate Management  
Customer Relationship Management  
Email Marketing  
Mobile Marketing  
Creative Flash Programming  
Social Network Marketing  
Online Advertising creative solutions  
Campaign/Site Analysis and Metrics

### WEBSITE & CONTENT



### COMMERCIAL

### CONTENT DISTRIBUTION

e-Player Video Syndication Network  
SNS Video Syndication  
Affiliate Video Syndication  
Omnisport.tv  
Omnisport.tv Partner Network  
Mobile Syndication  
Watch and Bet TV  
3rd Party Rights & Programming Syndication  
Data & Editorial Feeds



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# Who We Work With



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**Digital media offers rights holders increased control of their content/brand, direct route to fans and creates incremental commercial opportunities**

- Direct route to audience/fans
- Complements TV coverage
- Two-way communication/interactivity with fans
- Full control of content
- Increasingly the only way to reach 'younger audience'
- Cost-effective global 'broadcast'
- Capability to address niche audience/fan requirements
- Improves understanding of target audience and content popularity
- New commercial opportunities:
  - Advertising
  - Sponsorship
  - Subscriptions
  - Syndication/licensing
  - Betting
  - Auxiliary services (ticketing, eCommerce, membership etc)

# England – Ukraine: WC Qualifier



- Partnership between Kentaro (rights) and Perform (distribution, marketing and commercialisation)
- Match streamed exclusively online – first time for an official England match

The screenshot displays three news articles from different sources, all reporting on the historic decision to stream the England vs Ukraine World Cup qualifier live on the internet.

- Forbes:** The article, titled "British Papers To Stream Live Soccer", reports that UK newspapers will screen the England-Ukraine World Cup qualifier on their Web sites, but they're not entering the broadcast business. It notes that the UK's print media has been struggling with a steep fall in ad revenue and is looking for new revenue streams.
- guardian.co.uk:** The article, titled "England's next game could hit the net", states that England's next game against the Ukraine could be screened on the internet, on a pay-TV basis, for the first time. It mentions that the UK's print media was looking for new revenue streams and that the match could be a significant source of income.
- Telegraph.co.uk:** The article, titled "Ukraine v England could be screened live on internet after Setanta fallout", reports that England's World Cup qualifying match in Ukraine next month could be the first competitive game by the national side to be screened exclusively live on the internet after major broadcasters failed to bid for the game. It notes that the match could be a significant source of income for the national football association.

The articles also mention that the match will be streamed on the internet, on a pay-TV basis, for the first time. This is a significant development for the national football association, as it marks the first time a competitive game by the national side has been screened exclusively live on the internet.

# Ukraine - England: WC Qualifier



- Distribution via dedicated website and selected newspaper partners
- PPV commercial model
- Comprehensive digital marketing campaign to drive awareness and purchases:
  - Perform's ad network
  - SEO/SEM
  - Viral seeding
  - Social networking sites
  - Affiliate marketing
  - Targeted and phased email campaigns

[www.ukrainevengland.com](http://www.ukrainevengland.com)



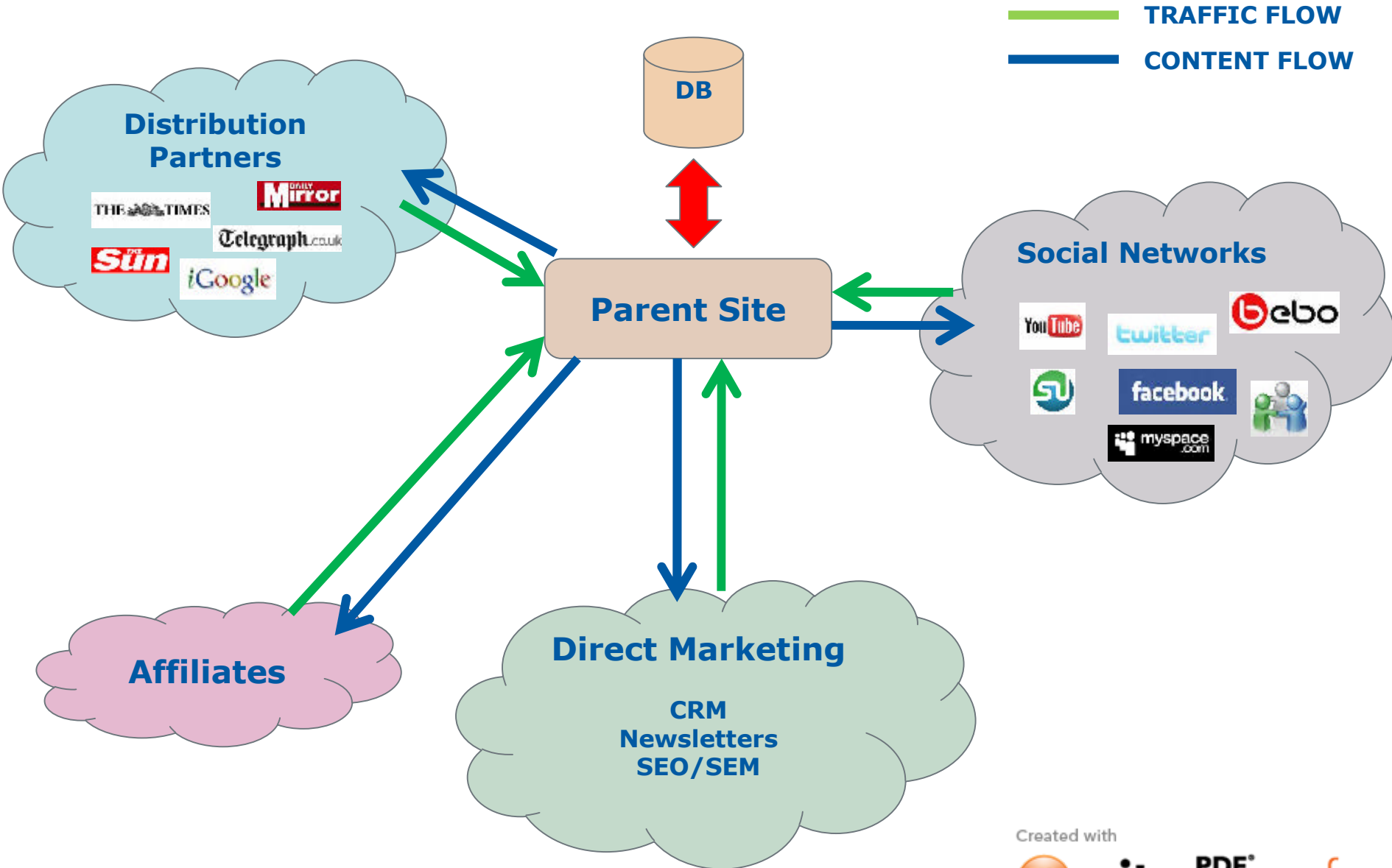
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- Critical aspect of any digital solution:
  - Delivers additional traffic to the target destination website(s)
  - Maximises user interaction with content and brand
  - Drives subscriptions/page impressions and reduces churn
- Perform's approach based on combining direct marketing techniques with creation of fully managed network of touch-points with end user:

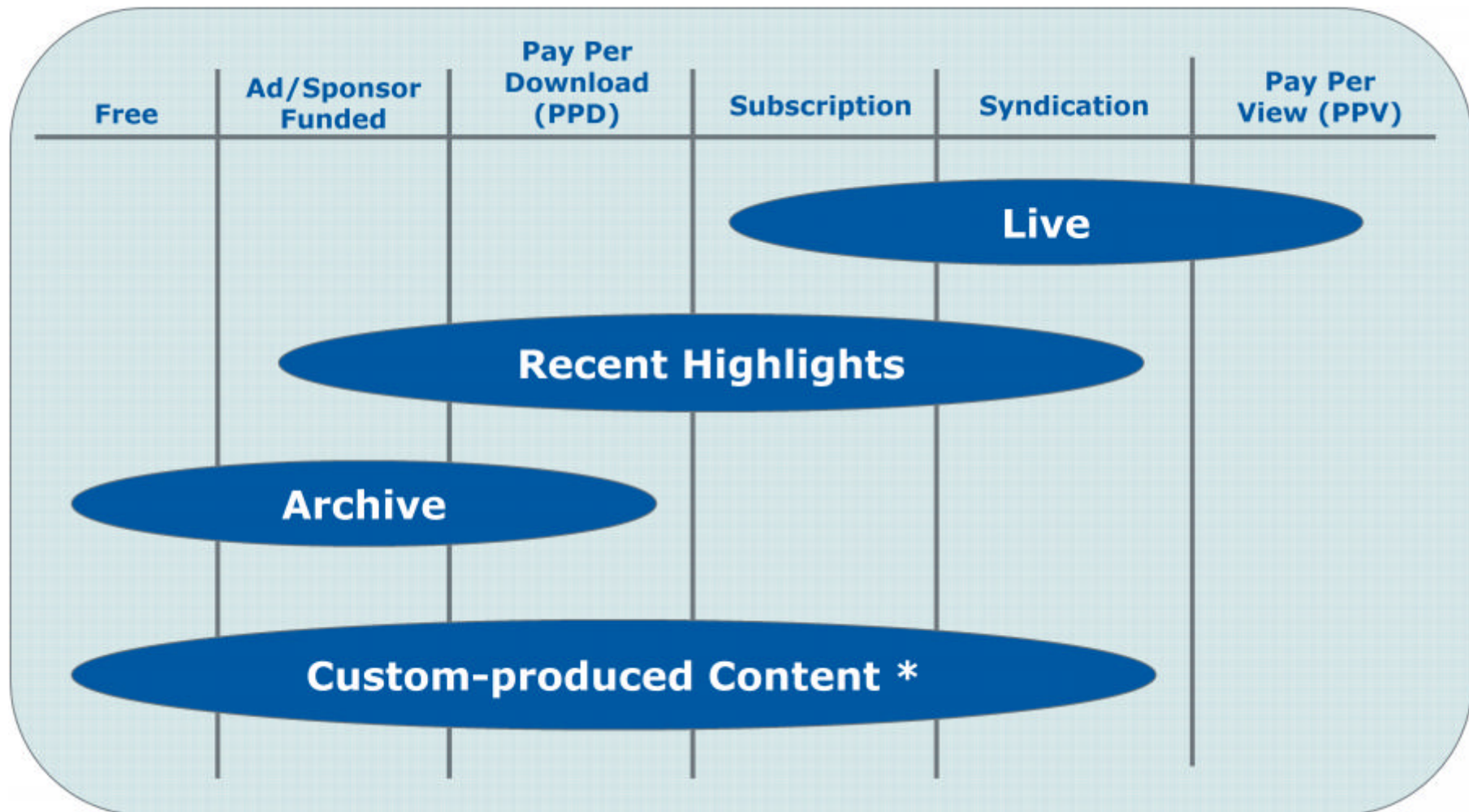
# Digital Marketing



- Perform's proprietary syndication solution, enabling high-value content to be embedded within key partner websites in a fully controlled environment
- Unique distribution model:
  - Content partner provides rights
  - Perform provides the technology and additional content
  - Distribution partners provide access to their audience
- Commercial model based on advertising revenue share between the content partner, Perform and distributor
- Establishes massive video advertising network – currently generating 20m+ video streams per month
- Hugely effective marketing asset - embedded on largest publishers' websites in UK, reaching over 15m monthly unique users



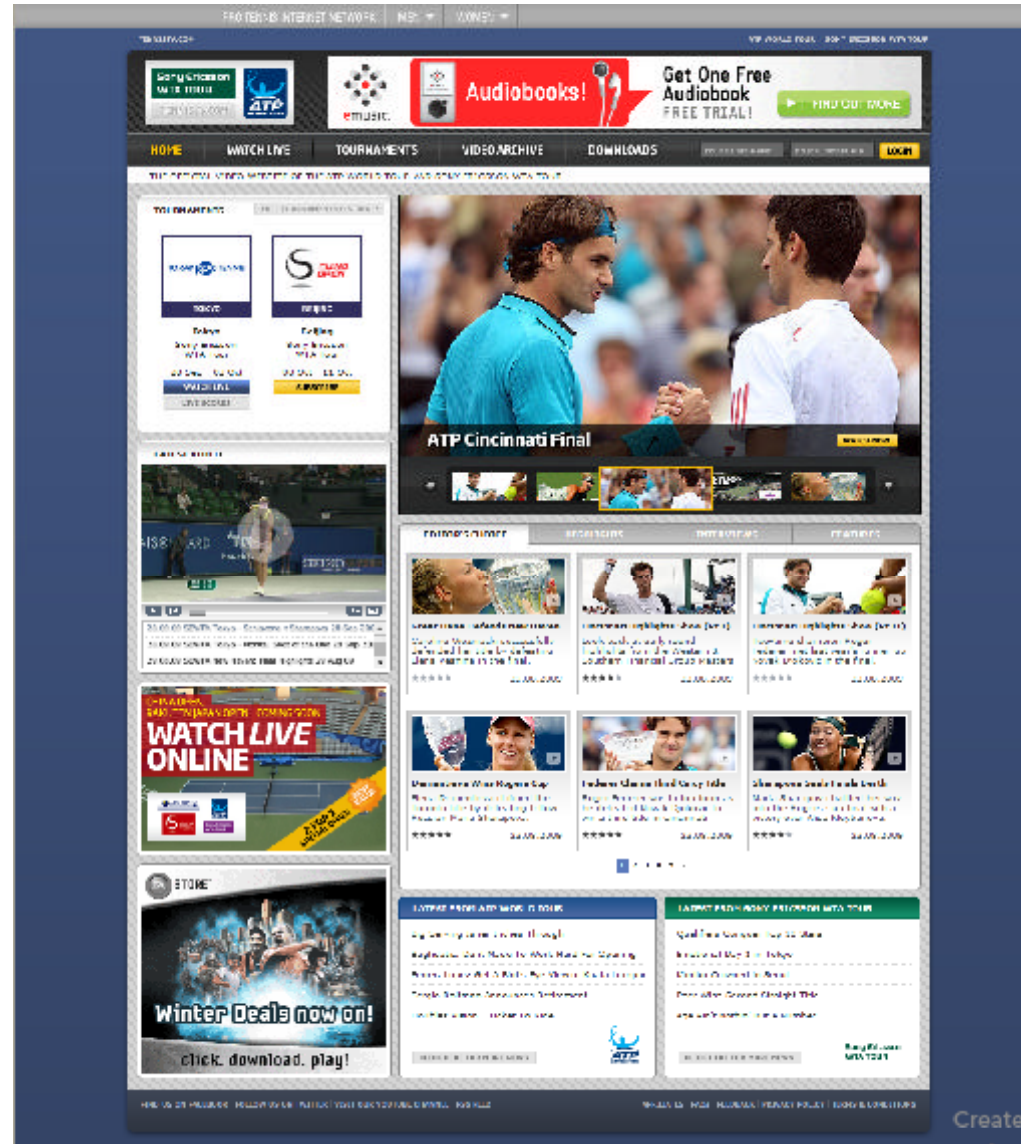
## Business Models By Content Type



\* Interviews, press conferences, behind the scenes, season highlights, classic moments etc

- Fans prepared to pay for quality live sport content - increase across all key indicators (traffic, conversion rates, ARPU)
- Still no proven ad/sponsor funded model for streaming of live sporting events
- Recent shift among subscribers towards shorter-term packages (PPV, weekly, monthly rather than annual)
- Match/event highlights increasingly shifting away from subscriptions to ad/sponsor funded model
- Other custom-produced VOD content can still justify subscription-based distribution, especially if exclusive
- Users' geo-split very important when determining which commercial model to use
- Free content critical for site promotion and usage
- iPhone apps provide a genuine mobile distribution channel for rich media content

# Case Study: TennisTV



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# Case Study: TennisTV



## Objectives

- Launch an internet video platform for live and on-demand streaming of main tennis tournament to a global fan base
- Establish technically innovative user proposition
- Drive interest in tennis, particularly among younger audience
- Develop new revenue streams for ATP and WTA while avoiding cannibalisation of TV rights

## Approach

- Live and VOD subscription website
- Over 700 live matches and 45 ATP and WTA tournaments per year available on multiple subscription packages
- Free video archive
- Live scoreboard
- Multi-court live stream proposition, covering up to 3 live matches at the same time
- Three different stream quality options, allow customers to have the best viewing experience, depending on the speed of their internet connection
- Comprehensive and integrated digital marketing strategy

## Results

- Established as the 'home' of live tennis online
- Huge growth in traffic and site usage in each of the past 4 years
- Very low churn rate, in spite of subscription price increase
- Overwhelmingly positive feedback from the fans
- Significant source of incremental income for ATP and WTA
- Increasing integration with 'real life' activities

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# Questions

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