

NICE-TO-HAVE OR MUST-HAVE?



Rachael Church-Sanders, SportBusiness Group's Technology Consultant, invited representatives from a number of players in the visual enhancements space to discuss the opportunities that tools such as on-screen graphics afford broadcasters, venues, commercial partners and sports properties themselves.

AS THE MEDIA landscape becomes increasingly competitive, broadcasters are seeking new and novel ways to differentiate their programming in multichannel homes from that of their competitors. Within sport in particular, graphics are often used to enhance visual experiences for fans both at home and at live events. Whether graphics and 3D imagery are used to track the trajectory of balls across a pitch or field, or to assist in umpiring decisions, enhancements are certainly becoming more sophisticated.

Joining the virtual roundtable discussion were: **Hank Adams**, CEO of Sportvision, an Emmy award-winning sports content creation and enhancement company; **Ofir Benovici**, director of marketing at virtual studio and TV graphics provider, Orad; **Steve Byrd**, executive vice president at STATS, a provider of sports information and statistical analysis; **Kay Hutchison**, director of partnerships at digital media company Red Bee Media, whose products include graphical sports analysis device Piero; **Sam McCleery**, executive vice

president of sales and marketing for PVI Virtual Media Services; **Nadia Petrossi**, F1 PR Manager at handheld broadcast device producer Kangaroo TV Europe; and **Bruno Sargeant**, senior TV/broadcast industry manager at entertainment and design software company Autodesk Media & Entertainment.

How do broadcast enhancements add value for viewers/spectators?

KH: "Generally, enhancements make content more engaging to the enthusiast, with greater depth of meaning, thereby holding them in. They also make the content more accessible and understandable to the new viewer or novice, thereby widening the programme appeal to newer audiences and advertisers. Enhancements can be anything from creating brand identities to promotion (enticing short creative sequences and related elements which work together either in video or print or web or any other platform) to draw people's attention to the content in a distinctive and involving way. Piero is one specific example of an enhancement which performs this function especially

well for the sports audience. Piero can show play from angles you can't see with a real camera – like the referee's point of view. It puts a new perspective on the action. By combining statistics with graphical enhancements, broadcasters can put the action into new context e.g. historical or player comparisons, giving additional meaning and explanation."

SM: "Broadcast enhancements originated so that viewers would not miss any element of the action when they could not hear the audio track. For viewers in pubs, sports bars and airports etc, broadcast graphical enhancements mean that you can enjoy the programme without hearing it. For sports like basketball, hockey, horse racing, boxing, Olympic sports and motorsports, enhancements add a layer of information to sports that are very fast paced and where the announcers may not have the time to fully explain a critical event or play. For new or casual viewers, enhancements can be the difference in how much engagement this viewer has with the sport and whether or not they become loyal

viewers. Additionally, as sports consumers watch their favourite programmes on 'second screens' (such as computers) enhancements can offer a richer experience with the addition of statistics and data."

BS: "Developments in the areas of graphics and effects have created a visually engaging viewing experience. In sport, this helps improve how to present and describe everything from the score, to game play, to the rules and potential outcome. For example, in the Olympics, video graphics were used to highlight the length someone had jumped; the position in a race; or the winner of a race – details that would otherwise be imperceptible to the human eye."

HA: "When done well, broadcast enhancements help a viewer better understand the action on the field. At Sportvision, we have three rules of thumb for what constitutes a good enhancement. It should enhance action that: 1) happens a lot; 2) is hard to see; and 3) is important to the game. When an effect fulfils these criteria, it transcends visual gimmickry and becomes part of the fabric of a sport. The Sportvision-

invented Yellow First and Ten line in American Football is a great example of this. Since first downs meet the aforementioned criteria, the virtual Yellow Line improves the viewer's understanding and enjoyment of the game and the effect is now on every major American Football broadcast."

SB: "The best broadcast enhancements provide viewers with more information in a short time frame – which ultimately provides a better understanding of the game. Numerous high tech enhancements have done magical things with the strike zone and pitch information in baseball. STATS is leading a big growth trend in European football to add more statistics and empirical information to the presentation of the game – from graphics on screen to primers for the talent and analysts. Our clients are utilising additional data and statistics such as clears, corner kicks and 'shots on goal' information. An exciting new breed of statistics – speed of player, distance covered, heat maps and the like are appearing through the use of optical tracking technology and lead themselves to a much more graphical representation than traditional 'numbers'."

OB: "In recent years, the focus of live sports production has shifted. It is nice to have an instant replay, but it is important to put this event in the right context, providing the viewers with in depth analysis. For example, during a football game when an offside call is made, you can simply replay the event or show a line highlighting clearly if there was an offside or not. Taking it to the next level would be to dynamically track and mark the relevant players prior to the offside event, demonstrating how the offside evolved and whether it was smart play by the defender or a mistake by the striker. Those kinds of enhancement features allow the commentator to better explain the game and enable the viewers to better understand the tactics and strategies."

NP: "With many changing variables - human, mechanical, environmental, in an auto race, Kangaroo TV helps track and make sense of each so spectators can be as informed as teams or privileged

personnel in the paddock. The more engaged the spectator is, the more they enjoy the race and become dedicated F1 followers. There is a greater level of information among fans using the Kangaroo TV in the grandstands. They are getting more from the experience than the fan without live commentary, full video and data. Beyond bragging rights in the pub after the race, fans want to know what is happening around the circuit, in the car, on the team radio, with race control and timing and scoring as it unfolds live in front of them."

What commercial benefits can be garnered from broadcast enhancements?

OB: "The implementation of sport enhancement features educates viewers about the sport so that they become more passionate about it and therefore more loyal. Ratings therefore increase. Most sports enhancement features could also potentially be sponsored. When enhanced graphics are appealing and meaningful, sponsors and advertisers like to relate their name to such a feature by associating their brand with it."

SM: "For sponsors, enhancements can deliver an 'embedded or in-programme' opportunity outside of the traditional 30-second commercial. Enhancements can connect a product to an event inside the sport that can be highly targeted and creative."

KH: "Connecting with end users and audiences is the key to differentiation for viewers confused by so many messages coming at them from all directions. The rebranding of the primarily male-targeted TV channel Dave [in the UK] has resulted in a three-fold increase in viewers, corresponding increases in advertising revenues, and all that has been done in effect is to change the look and feel and to find something, which connects with those desirable male viewers. The programming is still the same as the original channel's, but the name and the branding has been changed. The advertiser and sponsor advantages are self-evident! Virtual graphics can be another revenue stream for broadcasters by using them to place brands, logos

and animations of advertisers in prime sites at key moments. Or a virtual scene can be recreated with the sponsor's logo present e.g. 'Let's look at that goal again in The Guardian Stadium ... but from the referee's point of view'."

BS: "The television industry is in transition. The onset of IPTV, interactive TV, mobile TV and PVRs has resulted in more people watching more hours of television, but it has impacted what is watched. As a result, it is increasingly necessary to look at new ways to generate revenue. In addition to television commercials, programme makers are looking at sponsorship and product placement. Advances in computing performance and visual effects technology have been a catalyst to this trend, where product placement and programme sponsorship can be inserted into media content – live or in a very short timeframe."

HA: "Sponsors can certainly underscore their brand messages with well-executed effects. If an enhancement shows, for example, how reliable a golfer is when putting from certain distances, a brand based on reliability is an ideal sponsor. FedEx did just that with the 'Reliability Zone' that Sportvision created with the PGA Tour to help establish FedEx as the standard of reliability in golf. As the lines get blurred between broadcast, online and mobile distribution, the value of a great effect can be extended to make subscription products, support or ad-based content on a website more valuable."

SB: "Relevant, interesting, well done graphical enhancements provide an excellent platform for a brand to break through the clutter of a broadcast and traditional commercials. The 'Castrol Index' in recent UEFA football matches is a prime example. The commercial benefits are tremendous, with more sponsorable elements that create interest and ignite passion around the game and broadcast."

NP: "F1 teams using bespoke Kangaroo TV devices and content with partners, clients and VIPs have the opportunity to tell their race story and engage stakeholders with a greater level of understanding. Vodafone McLaren Mercedes



Steve Byrd



Sam McCleery



Ofir Benovici



Nadia Petrossi



Kay Hutchison



Bruno Sargeant

uses a dedicated video channel for partner messages and team communications when there is no track activity, and AT&T Williams has added its own race commentary to further draw their guests into the team perspective.”

Are broadcast enhancements there to build the brand of the broadcaster or the actual sport?

HA: “Both. In Sportvision’s experience with broadcasters, they are all interested in customising effects to help brand their unique approach to a sport. But great effects also build a sports’ brand. In the US, Sportvision produces a sophisticated set of effects for NASCAR by tracking every car live in the race and thus allowing broadcasters to identify specific cars in video with live data (time off leader, etc.), render those cars live in an online 3D environment, show air flow over cars illustrating drafting status and so on. The effects have done a great deal to evolve NASCAR’s high-tech image.”

KH: “Creative branding and promotion on every platform can do both – they remind viewers of the channel bringing them the experience and promote future events and programming. If the enhancement is a graphic, then a graphic is a graphic whether that’s an arrow, a caption, a badge or a corporate logo like ‘Guinness’, or a key message such as ‘Kick Racism Out of Sport’.”

OB: “When a broadcaster uses a unique feature it can definitely build its own brand, for example in the US Open Tennis Tournament, CBS introduced the flow motion effect for the first time and by doing so associated its brand with innovation.”

BS: “With the increasing cost of rights to broadcast sporting events, a network needs to maximise its return on investment. It is therefore necessary to create visually compelling graphics with the right promotional content to raise audience awareness that a network is hosting a sporting event, and about the value of that sporting event.”

SB: “Properly done enhancements make the sport more enjoyable and easier to follow, thereby enhancing



the sport’s brand. Broadcasters benefit by drawing more viewers, leading to better ratings and ad sales. The ultimate for the broadcaster is to be able to create ‘sponsorable’ enhancements - in essence creating inventory where there was none before.”

SM: “Almost all of the innovative enhancements at present are being developed by private companies and not by engineering groups inside the broadcast networks (think how HawkEye has improved tennis and how the electronic first down line in American Football has become a requirement). These enhancements do not reside at a single network because the companies need to monetise their inventions. If an enhancement has real value, you will see it across multiple networks in a sport.”

Finally, what’s next for broadcast enhancements?

SM: “To be successful, the next generation of broadcast enhancements will have to appeal not only to viewers watching on television screens but to second screens including laptops and mobile devices. Think of the future market for graphics shaped in the following way: the smaller the screen, the younger the consumer and the more appetite for graphics, data, connectivity and interactivity.

So, the model might be inverted- where once the enhancement innovations started on television screens, the most innovative ideas might be launched on the second (smaller) screens and migrate to the larger television screen.”

BS: “Fast turnaround, real-time graphics and interactivity are key to the future of sports events in broadcast. This points to an inevitable convergence of games and television technology; where, for example, sports presenters – and eventually viewers – will be able to re-enact game play and visualise sports scenarios in high-resolution, realistic computer-generated imagery.”

SB: “The next step is to create a more complete fan experience that encompasses numerous media platforms and technologies with ancillary content. If done right, you will ignite consumer passion and loyalty around your brand and broaden the appeal of your properties. Soon, I think you will see broadcasters utilise and tie together wireless, the web, cell [mobile] phones and relying upon television, internet and video on demand for an unprecedented level of coverage. Currently, broadcasters are using the web (and interactive TV) to supplement the main broadcast by providing a unique experience to drill down further into

the event and absorb live statistics and other graphical ancillary information to experience the game at a different level. At STATS, we also believe it will become more common for broadcast enhancements to tie into fantasy sports – which is a booming sector. Imagine a split screen with the broadcast in one box and a fantasy contest in the other. We already see this in interactive TV, but there is more to come.”

HA: “Allowing fans to customise their entertainment experiences will form the next wave for enhancements. Fans are already doing this in MLB, NASCAR, IndyCar and other leagues through online products where they create customised online ‘casts’ while watching the game on TV. Fans can follow their favourite driver or even see replays of pitch sequences, for instance. Increasingly, devices that merge TV and internet, such as Microsoft’s Media Home Centre or Apple TV, will allow fans to do all of this on one screen. Customisation could also take the form of interaction with a sport in real time - hitting a baseball pitch or putting your own bike in a MotoGP event in real time via a video game interface, for example. The technology already exists to do this, and I would expect to see it live in 2009.”