



The Accelerating Evolution of Sports Media, Sports Content and Viewership Behavior

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The first article in this series from December 2019, available upon request, is focused on what colleges and the conferences in which they compete must know in order to adapt to the constantly and rapidly evolving 2020 sports media landscape. Topics discussed included changes in consumer habits of content consumption, the precipitous decline in production costs to create that content, the rise of over-the-top (OTT) platforms and the pros/cons of a subscription model versus a free to consumer/primarily advertising supported model. The goal of this article is to outline some opportunities and threats faced by sports entities using the work Collegiate Sports Management Group (CSMG) has done with partners as an example, helping them become more educated, and as a result thriving in this everchanging sports content distribution ecosystem.

As an irreversible consequence of the current media landscape, sports properties and college conferences/universities must operate as de facto media/content companies to accommodate and address updated consumer needs and preferences. Specifically, according to the Video Advertising Bureau, there has been an eight fold increase over the past few years in people who have access to 3+ OTT subscription services, and according to this organization, OTT-only households have more than tripled since 2013. Additionally, according to Comscore, the number of US households streaming OTT content increased by 26% from March 2017 through March 2019; while households streaming on Smart TV increased 62% in the same time period from 18.4 Million to 29.8 Million. All indications are that this trend has just accelerated over the past year.

While this shift may seem daunting, the opportunities created from this newfound exposure extend well beyond athletic departments. For example, college and university enrollment applications are down in total across colleges and universities; with private institutions experiencing the biggest cumulative hit. Marketing the university in an organic fashion through content marketing transcends what can be done in a 30-second ad or a billboard. Russell Fink, Director of Programming at SportsNet New York (SNY), believes that sports broadcasts can and should function as a two to three-hour infomercial offering the ability to promote a school's entire ecosystem; including academics, student life, and affiliated health systems. Live games can also be a promotional vehicle for shoulder programming which can cover the athletes and other constituents connected to the athletic department. With these goals in mind, CSMG crafts unique "media road maps" to assist our college and conference partners in achieving their goals. Some examples of successful relationships over the past several years include the Colonial Athletic Association (CAA), the Southern Intercollegiate Athletic Conference (SIAC), Stony Brook University and University of Delaware.



One example of some best practices as it relates to media strategy and media rights is CSMG's relationship with the CAA which began in 2016. Since establishing the partnership, CSMG has brokered numerous innovative media deals with such networks as FloSports, CBS and CBSSN, NBC regional sports networks (RSNs), Lacrosse Sports Network (LSN) and Westwood One Radio. The FloSports deal is groundbreaking in that it is the largest Division I OTT-only media rights agreement in college athletics. With this deal, FloSports distributes 300 CAA events annually including the first round and quarterfinals of the men's basketball tournament and produces shoulder content centered around the conference. The CBS deal features a men's basketball Game of the Week package on CBSSN, while establishing CBSSN as the home of the semifinals and championships of the men's basketball tournament. The NBC RSN deal involves local linear deals with a handful of schools as well as airing the women's basketball tournament championship. Finally, the Westwood One deal created a home on radio for the men's basketball tournament championship.

Stony Brook University's innovative athletic department leadership believed that a sophisticated media strategy would enhance global enrollment to the university, expand their local/regional footprint and improve student-athlete recruitment. CSMG kicked off this relationship by brokering a partnership with SNY in 2019, which aired nine football/basketball games, working towards making SNY the "Home of Stony Brook Athletics. CSMG also utilized pilot technology from Kiswe Mobile to simultaneously broadcast Stony Brook basketball games in Mandarin. Finally, CSMG brokered a partnership for Stony Brook Lacrosse with the LAX Sports Network which included live events and shoulder programming.

On behalf of several schools, CSMG audited equipment and recommended installation of transmission and audio and video equipment as needed, as well as identifying and negotiating with packagers and production entities.

The ability to create impactful media strategies currently reaches beyond Division I in the college media landscape and well beyond the five major sports leagues in professional sports. This is exemplified by CSMG's relationship with the SIAC; a Division II conference consisting predominantly of historically black colleges and universities (HBCUs). CSMG began working with the SIAC in 2018; and brokered in that same year yet another deal with FloSports. This deal was the largest Division II OTT-only media rights agreement in college athletics. With this deal, FloSports became the home for SIAC football as they now distribute football games while also becoming the home for the men's and women's basketball tournament championships.

One additional finding in the area of media rights has been that once a conference or school receives a rights fee for its content and the content is broadcast or streamed by a third party media entity, the sponsorship community also recognizes the exposure and sees the light with respect to the value which these conferences or schools have in helping them drive their business. This is exemplified by several deals completed across conferences across levels of college athletics by CSMG on the sponsorship side.



The opportunities available to companies like CSMG and others to drive innovation across the media landscape as detailed by deals with broadcast networks, RSNs, OTT platforms and radio networks are now greater than ever. While in-person sports are currently on hold due to COVID-19, this pause allows CSMG and its clients as well as content owners across college and professional sports to utilize this opportunity to do a deep dive and study examples of working hand-in-hand with clients to use media, content creation, distribution and monetization along with optimization of social media. For colleges, this can provide a unique opportunity to innovate not only within their athletic programs, but also across the entire university, and across all revenue streams such as licensing, merchandise sales and most important, exposure and enrollment.

During a time period when in-person attendance at live sporting events is becoming challenging with sundry risks, the media strategy and broadcast rights, as well as optimization of fan engagement platforms and social media are more important than ever before. As we all get through to the other side of this COVID-19 health crisis and when life returns to "normal", our industry absolutely has the ability to emerge stronger than ever by doing a bit of a reset and taking the time to incorporate best practices afforded by technology and the rapidly changing sports media landscape.

Copies of part one can be shared by emailing the author at rkatz@collegiatesmg.com