Enjeux pour la production audiovisuelle

The winning goal: HDTV and the 2006 FIFA World Cup

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Partie 1 ENJEUX STRATÉGIQUES ET ÉCONOMIQUES DE LA HAUTE DÉFINITION

Enjeux pour la production audiovisuelle

The winning goal : HDTV and the 2006 FIFA World CUP

L’H Sport, Shooting, Live Par Francis TELLIER

HBS, the host broadcast of the 2006 FIFA World CupTM in Germany, presents the technical and economic challenges of producing the coverage of 64 matches in HDTV. Introduction Being a TV broadcaster is challenging work. To succeed, one needs to attract and keep TV audiences. Viewers, however, are notoriously hard to please. Therefore, broadcasters are constantly on the look out for new ways to attract viewers and retain audiences. Historically, sports and films have been the two main vectors of innovation in the television industry. They have consistently been able to attract the number of viewers necessary to make a new channel, service or innovation economically viable.

So it is only natural than when the subject of HDTV is raised, all eyes turn towards the Germany 2006 and how this showcase sporting event will be broadcast. Enter the host broadcaster HBS is responsible for host broadcasting the 2006 FIFA World CupTM, a task that it successfully performed in 2002 in Korea and Japan. The term “host broadcaster” dates back to the early days of TV, when the job of organizing the TV and radio operations for sporting events was entrusted to the largest broadcaster (or group of broadcasters) in the host country, hence the term “host broadcaster.” Today, however, the technical and logistical requirements of broadcasting major events, such as the World Cup and the Olympics, are too much for a single broadcaster to handle. It has become economically and technically more efficient to put a single dedicated company in charge of the job. To streamline matters even further, HBS is a subsidiary of InFront Sports & Media, the company responsible for marketing the television rights to the World Cup. As a result, when a broadcaster acquires
the rights to FIFA World Cup, it automatically becomes a client - or broadcast partner - of HBS. Our mission is to provide our broadcast partners with video and audio coverage of all 64 matches. To do this, we install production facilities at all the stadiums and build the International Broadcast Centre (IBC), a giga-tonic facility that houses both our technical nerve centre and broadcast partner studios and offices. HBS production teams, led by top international directors, produce the coverage of the matches. We deliver sound and images to our broadcast partners who in turn broadcast them to their home markets. If they want to produce their own match coverage in addition to HBS production, they can purchase additional production facilities from HBS. SYNOPSIS HBS: the host broadcaster of the 2006 FIFA World Cup, will cover all 64 matches in HDTV. Although the stakes of such a decision are high, HBS is convinced that HDTV is a technology whose time has come in terms of costs, availability and demand. 144 REE HORSSERIENT Septembre 2005 Enjeux pour la production audiovisuelle The time is right HDTV has gone mainstream. It is growing fast in the US, Japan and Korea, where usual TV picture quality is generally poorer than in Europe. It is just around the corner in Europe, where HDTV is beginning to be imple- mented at the broadcaster level and the prices of HD televisions are falling. The missing link is HD content. At HBS, we believe that, in the months and years ahead, demand for HDTV will continue to increase, driven by the market's increasing thirst for quality. CD music and DVD movies have turned average consumers into quality connoisseurs. Not only are they increasingly unwilling to accept low-quality sound and images, they are only willing to migrate to next-generation consumer electronics equipment when they are sure that it will deliver techni- cally superior, high-interest content. 16 a 90 Â > 11, 1 11 9 0 1 li 11 41 0 3 Figture 1. 16/9 widescreen format compared to 4/3. Sports programmes are just the kind of content that HDTV excels at, and where its superior image quality is its most visible. Already, select events at the Olympic Games in Athens were produced in HDTV by a consortium of broadcasters. The programmes were, however, broadcast mostly in the US and Japan. New challenge For HBS and our shareholder, InFront Sports & Media, the 2006 FIFA World Cup represents a unique challenge in terms of host broadcasting: How to cost-effectively deliver a higher level of technical production and excellence than in 2002, without a corresponding rise in operational costs. Somewhat paradoxically, we determined that HDTV holds the answer. For Broadcast Partners and viewers, the value of HBS and its coverage is determined by the editorial and tech- nical quality of our production. As all broadcasters know, the quality of live sports coverage is the result of a trade-off between the human potential of the production staff and the technical capabilities of the equipment at their disposal. The make sure that this trade-off is as balanced as possible in 2006, HBS has taken two key steps: To ensure top editorial quality, production * dream teams, * comprised of the best sports TV directors and staff from around the world, produce coverage. To guarantee the best technical quality, we use the very best production technology available - which, in 2006, means producing all 64 matches in widescreen HDTV with multi-channel surround sound. Our decision to go with 100% HDTV coverage was first announced in December 2003 after the completion of an extensive feasibility study in 2002-2003. At the time, however, the choice was not as obvious as it is now. However, based on our experience in Korea/Japan, and our understanding of the industry and where it is headed, we are confident that it was the path to take. There were three main reasons why: 144 REE HORSSERIENT Septembre 2005 Enjeux pour la production audiovisuelle No more trade-offs Up until recently, HDTV was not ready for prime time. TV sports directors had to compromise between the * technical * quality of HDTV and the " production " quality of SDTV. This was because HD versions of all the types of cameras used in stadium sports coverage did not exist. Consequently, matches filmed in HD looked great but were not as entertaining or as captivating as SDTV coverage. For this reason, until now it has been necessary for events such as the FIFA World Cup or the Olympics to produce a double coverage, or dual production. For the 2002 World Cup in Korea/Japan, HBS produced coverage of all 64 matches in SDTV and produced special HDTV coverage for 48 matches (through a pool of local broad- casters). The SDTV coverage was filmed using more than 20 caméras; the HDTV coverage used only eight. Nowadays there are practically no limits to HDTV production for stadium-based sports (it is still not suited for outdoors sports, such as the Tour de France, that require radio-frequency equipment). In 2006, all our cameras will be HD; this wasn't the case in 2002. For example, we didn't have cost-effective access to HD super-slow-motion cameras. Broadcasters are ready Widescreen HDTV is ideally suited to the transitional period that the TV industry is in today. It enables us to deliver superior content, editorially and technically speak- ing, to broadcasters in countries like the US and Japan, REE HORSSERIENT Septembre 2005 Enjeux STRATÉGIQUES ET ÉCONOMIQUES LA HAUTE DÉFINITION SSM 40-PBeauty SSM PITCH LEVEL Tactical Crane Crane A PSM: ill_i re i : -1 buff ! 0 0 à i4 km * .. i 2 T SSM SSM Dolly 41 41 41 " SenCh Bench .... 4'- - " SSM ssm 11 §i GraphicDesignby MainEntranceAgency Figure 2. Standard camera plaii, , where HDTV has entered the mainstream, as well as to SDTV broadcasters, and in particular those who broad- cast in widescreen format. The widescreen format is an important " by-product " of HDTV that should contribute to its adoption. All HDTV programmes originate in 16/9; the widescreen format is part of the HDTV technical specifications. Over the past few years, consumer interest in widescreen TVs has been fuelled by the growth in DVD movies and the availability of widescreen TV programmes, such as sports and documentaries. It is estimated that today 20% of European households already have widescreen TVs, with market penetration of over 30% in the UK, the Netherlands and Belgium. At current sales levels, widescreen penetration should reach 50% in Europe and top 70% in the most advanced markets in 2008, according to some estimates. Therefore, as consumers migrate to widescreen TV over the next few years, many of the TVs that they will buy will be HD-compatible. This should further help the adoption of HDTV in Europe. Moreover, as consumer demand grows, broadcasters need to keep finding new widescreen programming. Our coverage in 2006 will provide an important source of widescreen content. 4/3 broadcasters should not despair. Aspect Ratio Conversion will enable them to convert widescreen coverage to 4/3, according to their specific needs. Furthermore, HBS camera operators will be spee- cially trained to film matches in HD for use in HDTV and SDTV. Specifically, they will employ the " shoot and pro- tect " principle, which keeps match action in the
4/3 area of the screen called the "action safe area." Therefore, viewers will not be penalized for watching in 4/3, while 16/9 viewers will benefit from the widescreen perspective. Makes economic sense In 2002, the "dual production," with its separate SD and HD production facilities and teams, was complex and costly to plan and implement. Furthermore, HDTV coverage only interested a handful of our broadcast partners. In 2006, we will shoot and produce each match in widescreen HDTV. The feeds will be made available to Broadcast Partners in widescreen HDTV and SDTV. In just four years, dual production has gone from being a REE HORSSÉRIE WI Septembre2005 Enjeux pour la production audiovisuelle Y , > s ' i f x t " Figi (re 3. Shoot aid p-otet, seei bl, -ciiiei- a oigerator. costly necessity to an obsolete workaround. Today, widescreen HDTV increase the appeal of the FIFA World Cup for a more significant number of broadcasters. It ensures they have access to the finest coverage at the right price. It increases the value of these rights. Ensuring the future While everyone's attention is currently focused on the implementation of HDTV, our coverage will also be an important milestone in another domain: archiving. For the first time in history, all World Cup footage will be stored in HD format. In 2002, only the footage filmed by eight cameras for 48 matches was produced in HD. This will ensure the longevity and reusability of the footage in years to come. Again, quality and economics are all-important factor here. Viewers accustomed to the superior image quality of digital SD and HDTV dislike watching low-quality archival footage. Consequently, today's archives need to keep pace with tomorrow's broadcast requirements if they are to be of any value to broadcasters in the future. Conclusion In just four years, the landscape of TV technology and host broadcasting has changed radically. HDTV has gone from being a niche technology to being a mainstream one. It is now economically feasible for a host broadcaster to cover an entire event, even one as high profile and challenging as the World Cup, in HDTV. Furthermore, it is no longer necessary to sacrifice production quality, or ration the amount of HDTV coverage because of limited HDTV resources. Finally, and perhaps most importantly, HDTV coverage provides broadcast partners with more "bang for the buck." In effect, as right-holders they have access to the kind of high-quality, high-value content that HDTV-hungry viewers are demanding.

Francis Tellier, a French national, graduated from SUPELEC, "the French MIT" and the Paris Dauphine Business School. Since his involvement in the 1989 host broadcasting of the Albertville Winter Olympics, as the Director in charge of general planning, Mr. Tellier's career has included the host broadcasting of many major sport events. He was Managing Director of TVRS98, the host broadcaster of the 1998 FIFA World Cup and CEO of HBS, the host broadcaster of the 2002 FIFA World CupT "Korea/Japanand the 2006 FIFA World Cup Germany. t 1 1 zi REE HORSSÉRIE N°1 Septembre2005

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