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Over-the-Top Sport: Live Streaming Services, Changing Coverage Rights Markets, and the Growth of Media Sport Portals

Abstract

The growth of over-the-top (OTT) Internet and mobile video streaming services is a major development in the distribution, transmission and consumption of global media sport. Heavily-capitalised services such as Tencent Video, DAZN and Amazon Prime Video are intervening in coverage rights markets and changing how live sport is experienced and shared across television, computer, game console, tablet and smartphone screens. This article identifies and analyses six defining characteristics of OTT live sport streaming, and outlines three services (Tencent Video, DAZN and Amazon Prime Video) that operate across Asia, the UK, Europe, the Americas and Australasia. Its argument is that, first, live sport streaming is a key means by which television content and practices are escaping the boundaries of broadcast media, while also continuing to perpetuate the logics of television coverage and viewing practices. Second, drawing on Amanda D. Lotz's conceptualisation of portals, it is proposed that these services are establishing new norms concerning how media sport is accessed and curated and, as such, their arrival signals an historic shift in the global marketplace for sport coverage rights and the media systems through which live content circulates.

Key words: streaming video, live sport, coverage rights, television, portals, over-the-top (OTT) platforms, mobile media, multi-screen viewing, China, Amazon, political economy

Introduction: new deals and shifting territories

Sport has long been a cornerstone of the television industry. A technology created before a clear picture of its staple content and everyday use had emerged, television found in sport one of the most compelling reasons to purchase a set and to watch it (Williams, 1989). Established primarily in national public service and commercial free-to-air television systems, sport's combined qualities of liveness, emotion and appeal to identity made it ideal for subscription platforms, which demanded a strong justification for viewers to pay to watch television content. The progressive television-fuelled globalisation of sport saw the patching together of worldwide sport rights markets acquired by broadcast corporations (like the US's 21st Century Fox and ESPN, and Qatar's beIN Sports) in different national copyright jurisdictions (Rowe, 2019a). Although its power as a viewer attractor caused marked inflation in the value of coverage rights packages, sport has nonetheless become increasingly central to the economic viability of both advertiser- and subscriber-supported television corporations under intense pressure from audience fragmentation and proliferating viewing options. As this article demonstrates, these are far-reaching conditions of fragmentation and proliferation, encompassing screens, technologies, infrastructures and rights holders.

A shift in the coverage rights market for professional sport is gathering both speed and force over a decade after discussions of an emergent post-broadcast or post-network television order started to appear (Lotz, 2007; Spigel and Olsson, 2004; Turner and Tay, 2009). This momentum offers some validation for those who positioned live sport at the vanguard of how television viewing rituals are changing, serving as a site where an enduring cultural appetite for mass communal experiences intersects with the multiplication of mobile screens and personalised 'à la carte' viewing practices (Johnson, 2009; Hutchins and Rowe, 2012). A perhaps unanticipated consequence of this intersection between technology, culture and media practice has been the reinforcement of broadcast logics in the delivery of sport on smartphone, tablet, computer and television screens, *and* the availability of 'more television' content than ever before (Lotz, 2014, p. 55, original emphasis). This development arguably

makes live sport the most valuable form of premium content in the global media marketplace, supplying spectacular content for media events (e.g., the Olympic Games and FIFA World Cup) *and* reliably routine coverage of elite level leagues and competitions on all continents.

A series of coverage rights deals and a mega-event capture the transformation that is presently underway. In 2015, the Chinese company Tencent became the National Basketball Association's (NBA) most valuable international digital partner when it signed a five-year deal for exclusive coverage and content rights in China. The rights cost approximately US\$500 million, with another US\$200 million expected to be generated through a revenue sharing arrangement between the NBA and Tencent through its popular WeChat social networking service. In 2017, DAZN - the so-called 'Netflix of sports' - announced a ten-year deal valued at ¥210 billion (US\$1.93 billion) for exclusive domestic rights to Japan's top-flight football league, the J-League (Suruga, 2017, n.p.). DAZN then added to their rights portfolio in 2018 by securing exclusive live and on-demand rights to 114 Serie A matches in Italy for three years (and every game of Serie B), paying an estimated €600 million (US\$698 million).

In the US in 2017, Amazon paid a reported US\$50 million for non-exclusive digital streaming rights to the National Football League's (NFL) 'Thursday Night Football', taking over from the previous rights holder, Twitter. Amazon then paid an estimated US\$130 million in 2018 for the rights to an additional two seasons. Games are available to Amazon Prime Video subscribers in over 200 countries and territories. The growing prominence and value of live streamed sport, and the enduring appeal of broadcast television, was further confirmed during the 2018 FIFA World Cup in Russia. For instance, in the UK, the group stage match between England and Tunisia attracted more than 3 million viewers on the public broadcaster's streaming platform, BBC iPlayer, who joined the 18 million watching on BBC television. The second viewership figure is obviously much larger, but the first is still sizable enough to indicate why live streaming is attracting rapidly growing commercial investment.¹

This article focuses on the political economic dimensions of these changes to mediated sport viewing practices. The expanding market power exercised by operators of over-the-top (OTT) streaming

platforms is interpreted as both an outcome of the continuing popularity of television viewing, and of the related growth of Internet-based communications technologies, networks, infrastructures and markets for live streamed content, especially those of a sporting nature. That these companies are acquiring coverage rights across Asia, the UK, Europe, the Americas, Africa and Australasia signals that OTT platforms are harbingers of a global media sport marketplace, altering the structure of rights markets and media systems that have long been built around national and regional territories (Evens et al., 2013).

The argument presented is two-fold. First, live sport streaming is demonstrated to be a key means by which television content and practices are escaping the boundaries of broadcast media, while also continuing to perpetuate the logics of television coverage and practices. The proliferation of OTT platforms and markets means that, with sufficient technological and financial resources, it becomes possible for viewers to watch more sport on more devices in more places than ever before *and* to personalise viewing practices and experiences across a variety of screens and communities of interest (Hutchins and Sanderson, 2017). As our concluding comments show, this development has consequences for the relationship between sport and cultural citizenship in the network society (Castells, 2009; Rowe, 2004a). Second, drawing on Amanda D. Lotz's use of the concept of portals (2017), it is proposed that these services are establishing new norms for how media sport is accessed and curated and, as such, their arrival highlights a major change in the ownership and organisation of sport coverage rights. This change is evidenced by the entry of global 'big tech' companies and capital (Mosco, 2017, p. 64) into the market for coverage rights, as well as by the shifting territories and variable geographies through which content circulates in the pursuit of audiences, advertisers, profit and user data. The following section introduces Lotz's conceptualisation of portals as a way to analyse the significance of Internet-distributed television systems, services and markets, and to locate the role of live media sport streaming platforms within them.

Portals

The rise of live streaming services is part of a wider ‘platformisation’ of television (Evens and Donders, 2018, p. 1). According to Tom Evens and Karen Donders (2018), this term describes the emergence of an increasingly dominant ‘infrastructural and/or economic model’ in which the Internet functions as a ‘worldwide distribution infrastructure’ for audio-visual content (pp. 4, 9). This process is eroding the established distribution and rights models of the broadcast television industries and, in particular, the bundling of relatively expensive packages of channels by cable and subscription television providers. The outcome is widespread ‘cord-cutting’ by viewers and subscribers in favour of cheaper Internet-based OTT services that can be accessed across multiple devices, with no lock-in contracts (Strangelove, 2015, p. 94). (Although this is not to say that the overall cost to subscribers is substantially less when viewers subscribe to two or more streaming services in order to access all the programming and content they want.²) It is a trajectory both triggered and popularised by services such as the US’s Netflix (which had over 137 million subscribers as of October 2018) and China’s iQiyi (with an estimated 60 million regular subscribers as of February 2018). Yet, in the context of the contemporary digital media industries, the term platform conceals much more than it reveals about how culture, power and economic interests function (Gillespie, 2010). At first glance, a platform refers to a ‘neutral conduit’ and the computational, software and network infrastructures that enable OTT streaming (Gillespie, 2018, p. 14). However, the impacts of these services are far from neutral in terms of the socio-technical logics, commercial interests and Internet-based markets that produce and deliver television content to audiences around the world (Barker and Wiatrowski, 2017; Evens and Donders, 2018; Gillespie, 2018).

Conceived as a side project during the writing of a larger monograph, Lotz’s (2017, 2018) theorisation and conceptualisation of portals and Internet-distributed television offers a useful means to analyse the structure, meaning and effect of television’s growing platformisation. In *Portals*, the focus is on the implications of nonlinear television programming and viewing, and how they are changing the business of television production and distribution. In using the term portal, Lotz is emphasising

that these services function as a 'gateway', which in this case is to a 'library of television programs' (2017, p. 85, n. 18). This emphasis serves to:

... distinguish the crucial intermediary services that collect, curate and distribute television programming via internet distribution. Portals, such as Netflix, SeeSo, CBS All Access, and HBO Now, are the internet equivalent of channels.

Although selecting content is a key task of both [broadcast television] channels and portals, nonlinear access distinguishes portals from their channel brethren by freeing them from the task of scheduling. Portals' primary task might be better regarded as that of curation—of curating a library of content based on the identity, vision, and strategy that drive its business model. Many different curation tactics are evident among portals—tactics derived from the revenue model, the target market, and intellectual property owned by the portal, among other factors. (p. 8)

Viewed historically, commercial broadcast television systems have been organised around the parameters and constraints of linear 24-hour programming schedules and specific channels, or related multi-channels, and their ability to connect audiences to advertisers and sponsors. Portals work to disembed scarcity as a guiding principle in the management of broadcast schedules and content.³ Instead, they insert the intertwined logics of curation (content acquisition strategies and the organisation of expansive, dynamic and readily available content libraries) and mass customisation (of viewer experiences, algorithmic recommendation systems, promotional messaging, and access across a range of devices and screens) (also see Barker and Wiatrowski, 2017). The outcomes arising from this process are feeding into a larger 'matrix of industrial change' (Lotz, 2017, p. 13) that can be observed by: (i) a burgeoning range of services, libraries, interfaces and capabilities sold to subscribers and viewers through portals; (ii) the differing business and revenue models adopted by their operators, which

include both online-only specialists and broadcasters (using variations of subscription-supported, advertising-dependent and transaction-based models, and the purchase of externally produced programs and/or investment in internally funded content and intellectual properties), and; (iii) the multiplying screen- and Internet-connected technologies that enable access to portals, including ‘smart’ televisions, digital media players (e.g., Google Chromecast, Roku and Amazon Fire TV), video game consoles, desktop and laptop computers, tablet devices and smartphones.

Lotz is unapologetically quiet about sport in *Portals* given her stated focus on nonlinear television, although she does mention ESPN, the WWE Network and BAMTech in the course of her discussion.⁴ Her approach, therefore, opens up an opportunity to consider how live media sport streaming both fits within and further develops the portal concept. This contribution is needed because of the crucial role played by sport, by virtue of its immense value and popularity, in shaping global television and streaming markets (Evens et al., 2013; Evens and Donders, 2018; Rowe, 2011). At one level, sport appears to be a bulwark against the advance of portals because of the linearity imposed by the scheduling requirements and programming constraints of live event coverage. These constraints are reinforced by the enduring conventions of sport coverage and commentary, and the persistence of established sport viewing habits and the social rituals of fans that are attached to them. Yet, at another level, portals highlight new practices made possible by streaming services such as watching multiple live sports or events simultaneously on different screens, cutting between different events on the same screen in quick succession over the course of their duration, and accessing integrated live statistics, interactive features and online marketplaces during live mediated play. These possibilities and patterns are still recognisable as television sport, but in moving beyond the primacy of a single broadcast text, portals offer a more extensive and customisable ‘*set of goods*’ via the Internet (Lotz, 2017, p. 22, original emphasis).

Six characteristics of media sport portals

It is necessary to identify the emergent characteristics that define media sport portals, especially if they are to be understood within the complex of television distribution markets, communications systems and media technologies discussed so far. Based on our research and the evidence presented throughout this article, we propose that these services display six characteristics at this stage of their evolution.

1. *The privileging of liveness.* Liveness is a crucial property of media sport coverage on portals, as well as of other technologies and platforms that distribute television and television-like content (e.g., Facebook, Snapchat, ESPN+, Twitch, YouTube, Yahoo!) (Sørensen, 2016; van Es, 2017). This privileging is a product of two dynamics. First, media sport is a ‘perishable’ phenomenon because the tension and entertainment value of live sporting competition falls away markedly once a result is known, which significantly undercuts the value of delayed consumption and repeat viewing for audiences (Hutchins and Rowe, 2012, p. 21). This perishability places sport ‘at a crossroads’ of platform-based television viewing practices, imposing a linearity on the programming capacity of portals that are often designed for customisable non-linear viewing habits (Grandinetti, 2017, p. 18). Second, the appeal of live sport streaming is linked to a wider symbolic power that has long been associated with the experience of live events on television and radio. Intensified by the rituals of sport fandom, this power emanates from the meaning and value assigned to live events in terms of the access they offer to collective social experiences (Dayan and Katz, 1992; van Es, 2017).

Further confirming sport’s placement at the crossroads of platform-based viewing practices is the fact that selected portals also curate on-demand sporting content, including sponsored and independently produced documentaries, athlete profiles, lifestyle and reality programming. These programs align closely with Lotz’s analysis and arguments about the non-linearity of portals and the different libraries that they curate. Red Bull Media House has been a leader in this area for a number of years through short- and long-form video on Red Bull TV and YouTube (Thorpe, 2014). Amazon Prime Video mixes live sport coverage with its behind-the-scenes ‘All Or Nothing’ series (publicising Manchester City FC, the New Zealand All Blacks rugby union team, and various NFL and college

football teams). While stating publicly that it has ‘no plans’ to bid for live sport rights, Netflix commissions sport docudramas and documentaries such as *Last Chance U* (on US community college football) and *Icarus* (on Russian state-sponsored doping of Olympic athletes) (Carp, 2018). Netflix’s formal content partnerships also generate quasi-promotional programs about Formula One motor-racing and leading football teams such as the Italian Serie A’s Juventus, the English Football League’s (EFL) Sunderland AFC, and Argentina’s Boca Juniors.

2. *A mix of mass and niche services.* The aforementioned conditions of fragmentation and proliferation are apparent in the different media sport audiences served by portals and the business models attached to them. A remarkable amount of investment in streaming and rebranded television services is occurring internationally, reflecting a familiar phase in the establishment and consolidation of new media and technology markets (Evens and Donders, 2018).

Portal operators offering live professional sport coverage include big tech and telecommunications companies (e.g., Google [YouTube], Verizon and PPTV), established media sport television brands (e.g., ESPN, Turner Sports and Eurosport), and specialist sport streaming services (e.g., Eleven Sports, FuboTV and The Olympic Channel). A growing number of clubs, leagues and associations are also partnering with video streaming technology providers. These include leading German Bundesliga football club, Borussia Dortmund (partnered with Sportradar), the World Surf League (Facebook), Formula E motor-racing (YouTube), and the Women’s Tennis Association (WTA) (Perform). Another set of portals offers live and on-demand coverage to niche audiences by streaming lower tier, semi-professional and college sport events (Vann et al., 2019). These services are organised around specialist sites (e.g., Karate Combat and the English League Football’s iFollow) and aggregation sites (e.g., Rugby Pass and FloSports). All of these services strengthen an existing pattern in which web-based, digital and mobile media have made it possible for fans and like-minded users to concentrate their time and attention on their preferred clubs, leagues and sports to an unprecedented degree (Hutchins and Rowe, 2012).

A wide and evolving range of business and revenue models is also on display across media sport portals, including subscriptions of different lengths, payments for access to one-off events, specified packages of content (including 'freemium' content), and sponsor and advertising supported programming. The seasonal and time-based features of many sports, the different amounts of content that they generate with varying levels of appeal, and the intermittent scheduling of top-level major events (e.g., Cups, Championships and international multi-sport events) are all factors that inform how portals design interlocking revenue, rights acquisition and curation strategies. For instance, recognising that some viewers shift their attention between games across the league depending on the closeness of scores, the NBA's League Pass introduced the ability to pay US\$1.99 for access to the fourth quarter of out-of-market games.

3. *Changing rights territories.* The organisation of media sport rights markets according to exclusive national territories is being restructured by portals. This trend accelerates a longer-standing trajectory of globalisation in which media and communications systems and sport extend each other's reach in a symbiotic fashion (Miller et al., 2001; Rowe, 2011).

Three dynamics are at work in this process. First, the transnational architecture of Internet-based communications networks means that coverage rights organised via discrete and exclusive territories become harder to sustain and protect over time. Major clubs, leagues, events and sports have, as a result, begun to conceive of nationally-based audiences as sitting alongside or overlapping with potentially lucrative untapped markets in other countries. These markets are populated by expatriate fans, avid followers of specific sports, and potential new consumers. Under these arrangements, it becomes easier to name the handful of countries not served by portals such as Amazon Prime Video and NBA League Pass (e.g., Cuba, Iran, Syria and North Korea) than to list the various countries where they can be accessed. Second, this vast territoriality is built into the design of specialist media sport portals such as DAZN, Eleven Sports and The Olympic Channel, among others. The ambition of serving numerous national or regional audiences and/or a global audience is a core feature

in their development, launch and rights strategies, thereby distinguishing them from many national broadcasters who are now moving into live streaming. Third, the expansive territoriality of portals offers the possibility for semi-professional, non-traditional and/or marginalised sports to attract niche audiences in a wide range of locations (Vann et al., 2019). It is a capacity leveraged by disability sports on the International Paralympic Movement site, various forms of e-sport on Twitch, the likes of field hockey and BMX racing on Epicentre.tv, and idiosyncratic competitions such as the World Armwrestling League.

4. *Multiplying screens and spaces of consumption.* A noteworthy feature of portals is their facilitation and popularisation of multi-screen viewing practices. Multi-screen viewing – either split-screen on one device, or across two or more devices and screens – enables a spectrum of viewer choice regarding how sport is experienced. Sometimes including customisable camera perspectives, these practices are especially suited to popular events where simultaneous matches or games are scheduled, including the Olympics, Grand Slam tennis tournaments and the NCAA’s ‘March Madness’ basketball tournament. The outcome, as Lotz (2014) explains, is a dual strategy where the broadcast ‘large “event” audience’ is offered access to an expanded range of content sourced from the same event (p. 82). Indeed, ‘the sheer magnitude of content, screens and platforms’ made available to viewers is now a key feature of major media sport events, transmitting a surfeit of live content unavailable during the broadcast era (Hutchins and Sanderson, 2017, p. 40; Lotz, 2014, p. 82). Multi-screen practices also extend beyond live footage to incorporate so-called datatainment (Hutchins, 2016), including real-time statistics and analytics, infographics, fantasy sports and live betting markets, as well as social media feeds showing real-time comments and updates by fans and commentators. For instance, Eleven Sports offers a Watch Together feature that allows subscribers to re-imagine a living-room experience at a distance. Subscribers set-up a ‘room’ where they invite up to four other users to watch a live game together, with users appearing and speaking via webcam on a vertical sidebar located alongside the main live event screen (Eleven Sports, 2018). This feature formalises an arrangement that selected family members,

friends and groups have previously achieved through improvised means such as sharing subscriptions and passwords, and using smartphones, webcams and video-chat technologies to share screens with each other (Meese and Podkalicka, 2015).

Live media sport content is also delivered to, and consumed in, an increasing array of spaces. This development is animated by the interlinked spread of smartphones, tablets, mobile Internet and telecommunications infrastructures throughout urban space and social life (Feijóo, 2014; Goggin, 2011). These technologies and networks have made streamed and on-demand video readily available in public, private and workplace settings. Ethan Tussey's formulation of 'the procrastination economy' (2018, p. 6) captures an attendant change in the media marketplace that flows from these developments. Companies and advertisers are targeting the 'in-between moments' of media users' lives (Tussey, 2018, p. 6), with sport lending itself to the regular and/or compulsive checking of live match and game progress, score updates and highlights. MLB (Major League Baseball) Advanced Media in the US has, for example, worked to establish 'workspace media' as a domain for the routine consumption of streamed live games by baseball fans (Tussey, 2013, p. 37). This strategy takes advantage of the many MLB games that are played across time zones over the course of a day. Australia's largest telecommunications carrier, Telstra, has also used bus shelters to advertise the live streaming of Australian Football League (AFL) matches on its mobile network, emphasising the speed and reliability of its service for users on the move.

5. *Datafication of viewing and consumption habits.* Portals are contributing to a wider transformation in how audiences are constructed and commodified in the media and entertainment industries. This change involves turning away from audience measurement and ratings systems focussed on measuring content exposure through people metres and diaries. Rather, portals are computational and Internet-based platforms that support multifaceted audience 'information systems', characterised by data analytics, algorithmic management of viewer and user behaviour, machine learning and recommendation engines (Napoli, 2011, p. 10; Novak, 2017). Streaming services employ computer

and data scientists to *engineer* systems that underwrite investments in programming and library curation, develop audiences through the aggregation, categorisation and correlation of large-scale data, and construct granular audience and program genre categories (Lotz, 2017, p. 45). The result is a system architecture that encloses the viewer in a ‘monitored embrace’ effected by the capture, storage and mining of data (Lee and Andrejevic, 2014, p. 53).

Live media sport presents a tension in the datafication of streamed television consumption. The value of professional sport pivots on a collectively experienced and affective live event, which places limits on the personalised viewing options that are possible or desirable. Evolving audience information systems are, nonetheless, producing fine-grained statistics about how sport is accessed beyond broadcast media. This process is evident in terms of expanding geographies and temporal compression. The opening night of Amazon Prime Video’s coverage of NFL Thursday Night Football in 2017 highlights this trend. Familiar ratings figures for regional and national audiences gave way to an ‘average worldwide audience’ of 372,000 that watched for ‘at least 30 seconds’ in 187 countries and territories. Subscribers watched for ‘an average of 55 minutes’ and approximately 1.6 million viewers ‘initiated a stream’ (Leung, 2017). These putative insights reflect an intensifying rationalisation of audience understanding in which data functions quantitatively and discursively to justify decisions made about rights acquisition, content curation and viewer engagement (Napoli, 2011). The Senior Vice President of Revenue Management for DAZN in North America, Joe Markowski, describes this mindset:

[Data] ... drives all investment decisions now ... There has to be data justification for any investment decision we take and strategic decision we make. That’s been a big focus from a management perspective and that’s a change and new thing in the industry ... We’ve invested time in doing that so that the culture of the business is data-led ... and anything we do is data justified. (Quotation from The Digital Sport Insider Podcast, 2018)

This statement supports Lotz's argument concerning the identities and visions of portals being based on distinct business and curatorial strategies, even as the linearity and presentation of live sport recalls the rituals and logics of broadcast television.

6. *Changing technical infrastructures and problems.* As with most new consumer technology services, the marketing of portals is built on 'celebratory discourses' that promise 'efficiency, immediacy, and flow' for the viewer (Alexander, 2017, p. 3). This promise obscures the fact that the failure of computing and mobile technologies – buffering, service interruptions, bandwidth limitations, program crashes, overloaded servers, video compression problems and drained batteries – is a routine and arguably inevitable part of consuming high-quality video content via fixed and mobile Internet (Alexander, 2017).⁵ Buffering is a particular problem in the experience of live streamed sport, impacting on the ability of fans to follow the flow of the game and to experience pivotal moments in real-time. This is a serious impediment to viewer satisfaction given that liveness is a quality valued by sport fans and sold by streaming services. In contrast, the infrastructures of broadcast television – free-to-air, cable and satellite – have developed an enviable track record of robustness in the delivery of live sport over several decades, with transmission interruptions, pixelated screens and audio problems being comparatively infrequent occurrences.

The perils of buffering and outages for media sport portals are demonstrated by the public complaints of subscribers and adverse news media coverage. The Australian telecommunications carrier, Optus, suffered heavy brand damage for chronic outages during its streaming of the 2018 FIFA World Cup. Optus purchased exclusive coverage rights to 39 matches that did not involve the national team, and non-exclusive rights to another 25 matches. Blaming the technical problems on 'unprecedented demand', Optus became subject to widespread subscriber complaints on social media services (#floptus) and news stories across the country (ABC News, 2018; Meese, 2019). Then-Australian Prime Minister, Malcom Turnbull, even intervened publicly to demand a fix to the outages.

Optus was forced, humiliatingly, to allow the public television broadcaster, SBS, to screen all of the games, took out full-page advertisements in national newspapers apologising to football fans, and offered refunds to subscribers. Other examples of protracted buffering and service interruption include YouTube TV's stream of the World Cup semi-final between Croatia and England, the opening weeks of DAZN's coverage of the 2018-19 Serie A season, and TBS' (Turner Broadcasting System's) streaming of a wildcard game in the 2018 MLB post-season. Each of these cases prompted fan and subscriber criticisms on social media and in online fora. Yet, these problems are arguably best understood as inevitable rather than exceptional in terms of the experience of live video streamed via the Internet:

... there isn't likely a live sporting event that gets streamed that hasn't seen problems, and ones larger than delays in the stream or buffering problems that could range from poor cell service, to weak wi-fi to the inherent delay that comes with the signal from the camera at the sporting event going through an incredible number of digital services that eventually gets the stream to your device. (Brown, 2016)

This infrastructural complexity helps to explain why broadcast television remains a key means of consuming and experiencing sport, even as audience and subscriber attention moves in criss-crossing directions across screens, devices and services. Attention now turns to three portals that exhibit distinct identities, visions and strategies and, as a result, offer important insights into the business models and markets for live streamed media sport.

Services and operators

This section discusses the size, rights and features of three portals that offer high-profile live sport - Tencent Video (based in mainland China), DAZN (based in the UK), and Amazon Prime Video (headquartered in the US). Emphasising the emergent features of 'global media sport' (Rowe, 2011),

these streaming services operate across Asia, the UK, Europe, the Americas and Australasia (with Amazon Prime Video also covering sections of Africa, the Middle East and Oceania). Highlighting China's ascendancy as a leading global hub of technology and media, Tencent Sport is part of the wider Tencent empire and focuses its streaming operations on a single national territory. However, its ownership structure (roughly one-third owned by the South Africa-based multi-national Naspers), range of services, and the breadth of the Chinese diaspora complicate any claims to a neatly contained national focus. Owned by the Perform Group, DAZN is a specialist sport streaming service that stands out because of its commercial aggression in building an extensive content library across multiple sports and four continents. Amazon Prime Video exhibits a comparatively focussed rights acquisition strategy, calibrated to draw subscribers into Amazon's closed ecosystem of retail offerings and consumer technology products. The overall picture that emerges is one that is familiar in terms of how live media sport is valued and presented on screen, but unfamiliar regarding how content is transmitted, who owns and controls it, and the infrastructures that deliver it.

Tencent Video

The scale of OTT streaming in China has increased dramatically over the last decade to become one of the largest national markets in the world, with an overall estimated value of ¥59.38 billion (US\$9.15 billion) in 2017. Prominent operators include YouKu (owned by Alibaba), iQiyi (Baidu) and PPTV (Suning). An acceleration of investment in live sport rights followed a 2014 determination of the State Council to open access and competition to private businesses, thereby undoing the monopoly previously held by the state-owned China Central Television (CCTV). It is a decision that highlights the unique structure of the Internet and digital media industries in China. This mode of informational capitalism is based on centralised political decision-making by the ruling Communist Party *and* turbo-charged financialisation powered by access to global capital markets (Fuchs, 2016; Jia and Winseck,

2018). Following the State Council's decision, sport rights quickly became a strategic asset used by portal operators to increase subscriber numbers and market share (Li and Scott, 2018).

Tencent Video stands out among media sport services because of its ownership by Asia's most valuable company, its vigorous rights acquisition strategy, and the popularity of its services. Founded in 1998, Tencent began life as an online messaging provider and has since added a suite of offerings, including social networking, e-commerce, group voice and chat, mobile and multiplayer online games, online music, payment systems, and cloud computing. Tencent Video forms part of these integrated services and connects to a specialist Tencent Sports mobile app that claims over 4.6 million active users, making it the most popular of its type in China. The most noteworthy feature of Tencent's live sport coverage is that it delivers a range of premium content from the US, UK and Europe to Chinese audiences. This approach continues a pattern in which wealthy Western sports target Asian countries and cultures for 'expansionary strategies' in an effort to attract new audiences, advertisers and sponsors (Rowe and Gilmour, 2010, p. 1530).

Tencent has purchased streaming rights to all four major North American sport leagues, the NBA, MLB, NFL and National Hockey League (NHL). It has also positioned itself as the home of streamed basketball content in China. In addition to the NBA, it shows NCAA men's college basketball, and has signed a nine-year agreement with the International Basketball Federation (FIBA) in 2017. This deal grants Tencent rights to stream the majority of international basketball competitions, including the FIBA World Cup, Olympic Games qualifiers and Youth World Championships. This content library is complemented by a range of exclusive and non-exclusive coverage deals for three of the four tennis Grand Slam tournaments (the US Open, French Open and Wimbledon), Formula One motor-racing, the Tour de France cycling race, and top-flight football leagues in Italy, France, Scotland, Germany and Europe (the UEFA Nations League). The combined value of these rights deals is difficult to ascertain due to the reluctance of Tencent to publicise the amounts that it has paid. Nonetheless, the rights deals detailed here likely total well over US\$1.5

billion, with deals spread across one-, three-, five- and nine-year periods. Tencent's model of offering major media sport leagues access to millions of Chinese consumers also underpins a collaboration with ESPN. Centred on the NBA and international association football, video and information content produced by ESPN is localised and distributed via Tencent's media platforms.

DAZN

Pronounced 'Dazone', DAZN is a subscription-based media sport portal owned and operated by the UK-based and privately-run Perform Group.⁶ Describing itself as 'the first global pure sport live and on demand streaming service', DAZN launched in Germany, Austria, Switzerland and Japan in 2016 (Perform Sports Content and Media, 2018). It has since expanded into Canada, Italy, Spain, the US and Brazil. As with Tencent, this rapid growth is fuelled by heavy investment in coverage rights. Economies of scale are achieved by the sharing of content, data and technology across different territories, both between DAZN portals in each country and across the wider Perform Group. The Group runs a variety of business-to-business (B2B) and business-to-consumer (B2C) divisions that encompass sport news services, live and on-demand video, betting services, sport data and analytics (e.g., Opta Sports) and websites (e.g., Goal.com).

DAZN's expansion is remarkable both for its speed and financial boldness. It spent close to US\$2 billion on exclusive rights to the J-League in Japan over a decade, almost US\$700 million for exclusive rights to Serie A in Italy for three seasons, and another US\$1 billion for 32 fights each year promoted by Matchroom Boxing (over an eight-year period). Indeed, DAZN's involvement in national and global coverage rights markets stretches across association football, basketball, baseball, ice-hockey, American football (NFL and NCAA), professional wrestling, rugby union, cricket, mixed martial arts, tennis, motor-racing, darts and snooker. Much like Netflix's strategy of building audiences while sustaining large initial losses, DAZN has acquired substantial content (in its case sport), leading it to 'rack up potentially billions in losses buying sports rights' until subscriber numbers achieve a volume

that delivers profitability (Sweney, 2018, n.p.). Consistent with this business model, DAZN's revenues rose from £8.7 to £90.8 million (US\$11m to \$115m) in 2017, while the overall operating losses of the Perform Group quadrupled from £50.8 to £214 million (US\$64 m to \$270m) (Sweney, 2018, n.p.).

Amazon Prime Video

Amazon became the most valuable publicly listed company in the world in January 2019, and has consistently ranked in the top five alongside Apple, Alphabet (Google's parent company), Facebook, Microsoft and Tencent. Founded in 1994 by Jeff Bezos and starting life as an online bookstore, it has since become known for stratospheric profits, tax avoidance, and the questionable treatment of its employees and 'anti-union tactics' in the workplace (Menegus, 2018, n.p.). These characteristics connect to an extraordinary range of services and products – cloud computing, home security, wind farms, health and transport services, video games development – that highlight an ambition to sell 'everything' (Martineau and Matsakis, 2018, n.p.).

Amazon Prime Video launched worldwide in 2016, offering a variety of on-demand television programs and movies sourced from Amazon Studios (e.g., *Transparent* and *The Man in the High Castle*) and other studios. The high-profile rights deal that it signed with the NFL in 2017 was used to promote the Prime Video service and to publicise its technical proficiency, boasting that it live-streamed Thursday Night Football to '200 countries' and '600 different types of devices with little-to-no lag or delay compared to the traditional TV broadcast' (Soper, 2017). Amazon has since used parallel coverage deals to promote the Prime Video portal in selected markets. Mark(et)ing itself as a destination for live tennis coverage in the UK and Ireland, it paid around £10 million (US\$12.5 million) for the rights to 37 Association of Tennis Professionals (ATP) World Tour events, plus another £30 million (US\$40 million) for the rights to the US Open (both are five-year deals).⁷ Prime Video further bolstered its UK service by securing rights to 20 English Premier League (EPL) matches for three seasons. It then added channels from the Eurosport television network, making the likes of live cycling

and the Olympic Games available to viewers. In Germany and Austria, the relationship with Eurosport extends to the live streaming of Friday night games in the Bundesliga. The Association of Volleyball Professionals (AVP) World Tour is also part of Prime's global content library – with the exception of China – between 2018 and 2020.

The striking feature of the Prime Video portal is how it is embedded within, and used as a gateway to, Amazon's other media services and hardware products. In Germany, Amazon also purchased the live audio-streaming rights to the Bundesliga and makes the commentaries available through the Amazon Music service. In the US, Amazon Web Services became the NFL's 'Official Cloud and Machine Learning Provider for Next Gen Stats' in the same year that Prime Video began live streaming NFL games (Business Wire, 2017). The Amazon Echo home speaker was advertised on television during coverage of the NFL Super Bowl in 2016.⁸ In addition, NFL games are made available for free on the Amazon-owned Twitch live video game streaming service, which also streams the NBA's minor league development competition, the G League. In the UK, the EPL's Arsenal FC has its own in-built capability on the Amazon Alexa cloud-based voice service that makes real-time stats and live commentary available to users. The Prime Video Service can also be watched through hardware devices branded and sold by Amazon, including the Fire TV Cube, Fire TV Stick and Fire tablets. All three portals discussed here reveal just how far media sport production, circulation and consumption is advancing beyond, while incorporating and adapting, the arrangements that characterised the broadcast era.

Conclusion: Property, portals and TV sport storms

A significant series of changes in television viewing technologies and rights markets has been addressed in this article, although the historical instability that they represent should not be exaggerated. Across the last century, television has seen many major re-adjustments, including (and with variable significance according to particular context): the transition from black-and-white to colour, terrestrial

to cable, and from standard to high-definition images; the introduction of satellite transmission that made possible global live events (Dayan and Katz, 1992), especially those of a sporting nature; the erosion of free-to-air public service broadcasting – first by commercial free-to-air and then by subscription and pay-per-view; the arrival of time-shifting technologies, such as video, DVD and personal video recorders; and the niche viewing made possible by multi-channelling. The wave of post-digital multi-platforming has accentuated and accelerated such changes, rather than unleashed an unanticipated rupture, despite claims by various industry actors to have been surprised by the speed and depth of developments in networked media sport (Hutchins and Rowe, 2012). Thus, to say that television has or will be ‘revolutionized’ and ‘very much untethered from the living room screen’ (Lotz, 2014, p. 84) is really to pinpoint the continuing impacts of accumulative change.

It has been known for some time that the domination of broadcast television has come to an end, meaning that the structural integrity of national televisual systems has been eroded. The many portals via which television content can be delivered has created new conditions that have forced broadcast corporations to compete and collaborate with other providers and distributors in the digital technology and telecommunications sectors across the world. It is for this reason that we argue that television viewing is not being weakened, but is expanding and diversifying. The multiplication of screens, images and portals means that the ‘seeing at a distance’ that defines television is now in the hands of many more organizations and actors, from Internet service providers to ‘producers’ (Bruns, 2008).

Sport, as amply demonstrated here, has been one of the most prized and adaptable forms of televisual content within a broader ‘media sports cultural complex’ where texts are exchanged, reconfigured and repurposed in sustaining its energetic mythological discourses of nobility and partisanship (Rowe, 2004b). But, this desirability has also led to price inflation, with expensively acquired sport rights sometimes functioning as loss leaders for other screen content and services, and causing company failures because of cost/prize squeezes in established markets such as the UK and fast-

growing ones like China. As Derek Thompson (2013, quoted in Lotz, 2014, p. 14) has pithily put it, ‘Without live sports ... the TV business could fall apart; and because of live sports, the TV business could fall apart.’ Unlike first-run quality drama, sport is relatively inexpensive to produce and is distributed in the same way, but the acquisition of rights to its most popular forms is challenging, irrespective of the platforms on which it is delivered. For this reason, and despite all the turmoil surrounding technologies and devices, the centrality of intellectual property rights remains unshaken. Portals are particularly vulnerable to copyright infringement and the operation of informal media economies – more commonly referred to as piracy – and, in the case of live sport, demand for access is highly concentrated in linear temporal segments (Lobato and Thomas, 2015). Patrolling and extracting profit from mediated sport rights is vigorously conducted at levels ranging from global sport events like the FIFA World Cup and the Olympics, and major boxing matches, to minor football leagues (Evens et al., 2013; Rowe, 2019b).

To grasp the dynamics of contemporary media sport, then, it is necessary not only to follow the action across proliferating screens, platforms and portals, but also to track the commensurate slicing of the copyright cake across the global media sports cultural complex. This focus on the struggle between industry segments, though, should not be allowed to obscure the ramifications for sports that are construed primarily as content, and the viewers and fans who are reduced to units of consumption. Commercial decisions regarding mediatisation, access and cost have a direct bearing on sport and television’s relationships to cultural citizenship, the rights to which need to be safeguarded to enable the full participation of citizens in the collectively oriented public culture environments that constitute the social (Miller, 2007; Rowe, 2004a). As the marketisation of television sport has progressed, the citizen-consumer balance has shifted from the former to the latter, not least because of the associated displacement of a public service ethos and rationale (Scherer and Rowe, 2014). The crucial ‘society-making’ function of media must be remembered and, wherever possible, protected as the seemingly inexorable drift towards datafied and atomising ‘segment-making’ media continues and accelerates

(Turow, 2011, p. 193; Turner, 2016, pp. 35-36). In considering the publicity-based claims made on behalf of media sport portals, a critical political economy perspective must continue to ask who has the financial and infrastructural means to take advantage of post-broadcast sport on screen(s), including the role played by regulatory and policy settings in different nations and territories (Evens and Donders, 2018; Meese, 2019). A failure to do so will lose sight of the interests of viewers, fans and publics and whether they are best served by the games being played with relentless vigour in the coverage rights marketplace.

Notes

¹ While a detailed account of Facebook's acquisitions and activities is beyond the scope of this article, the social media giant has also been active in the coverage rights marketplace during the same period. Seeking to promote its Facebook Watch streaming service, it secured exclusive rights to EPL matches in Cambodia, Laos, Thailand and Vietnam for approximately US\$265 million from 2019 to 2022. This contract sits alongside another four-year deal valued at an estimated US\$1.4 million, which sees Facebook exclusively stream 27 games of South America's premier club football tournament, the Copa Libertadores, in nine Latin American countries.

² The costs of Internet and mobile service provision also need to be considered here.

³ Parallel developments in a movement away from scarcity were observed in the online media sport marketplace a decade ago (Hutchins and Rowe, 2009).

⁴ BAMTech is the majority Walt Disney-owned company that was spun-off from MLB Advanced Media in 2015. BAMTech provides OTT streaming infrastructures and services for the likes of HBO Now, Riot Games (the developer of 'League of Legends'), Eurosport, the National Hockey League (NHL), the

WWE Network, and the Professional Golfers' Association (PGA) Tour. Given that ESPN is also majority owned by Disney, BAMTech is also central to a new ESPN-branded streaming service, ESPN+.

⁵ Parallel failures are observable in the provision of cloud computing services due to service dropouts and power problems (Mosco, 2014).

⁶ Founded in 2007 following the merger of the Inform Group and Premium TV, the Perform Group was de-listed from the London Stock Exchange in 2014.

⁷ Amazon Prime's coverage of 2018 US Open received overwhelmingly negative reviews from subscribers, who complained about picture and sound quality.

⁸ See <https://www.youtube.com/watch?v=RY5258I27nA>

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