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# **What Drives Sports TV Rights? A Comparative Analysis of their Evolution in English and French Men's Football First Divisions, 1980-2020**

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# **What Drives Sports TV Rights? A Comparative Analysis of their Evolution in English and French Men's Football First Divisions, 1980-2020**

This article consists of a comparative analysis of the evolution of TV rights in English Premier League and French Ligue 1 men's football over the 1980-2020 period. It aims to understand the differences in this evolution in both leagues. It first reviews the literature on football TV rights in Europe then the history of pay-TV football in the UK and France. A framework to be tested is then suggested with the identification of 16 independent variables. Correlations are calculated between these variables and TV rights in England and France to test whether the suggested framework is supported by empirical evidence. These correlations enable to explain why TV rights for the Premier League have become much larger than for the Ligue 1. They show that the main driver for TV rights is the main domestic broadcaster's turnover. They also enable the identification of a virtuous circle for the Premier League.

## **Introduction**

Over the 2016-2019 period, the English Premier League (EPL) TV rights reached a record £8.336 – £5.136bn from national rights,<sup>1</sup> £3.2bn from foreign rights<sup>2</sup> – likely to be overcome over the 2019-2022 period despite the decrease in national rights (estimated at £4.655bn, £4.555bn from Sky and British Telecom<sup>3</sup>, £0.1bn from Amazon<sup>4</sup>) thanks to the continuing growth in foreign rights.<sup>5</sup> These £2.8bn per season have to be compared with the annual £2.6m (£8.7m in constant prices) for the 1983-1985 period, when the first televised live English Football League (EFL) matches were shown.<sup>6</sup> This indicates the dramatic increase in TV rights for English football from the 1980s, also true to a lesser extent in French football. Indeed, national TV rights for the latter have increased from €0.8m (€1.5m in constant prices) in 1984-1985 to €748.5m per season over the 2016-2020 period.<sup>7</sup> If football TV rights are currently very large and represent a main source of revenues for clubs, the amounts in the 1980s remind that this has not always been the case. TV rights have become more and more important for football clubs over time and a key factor to generate a competitive advantage

for a national football league compared to its competitors. This is an essential aspect in the European context where football clubs from different national leagues are in contention in continental competitions (Champions League and Europa League). Some important elements are to understand why football TV rights have benefited from such a huge increase since the 1980s but also why different national leagues have benefited and benefit currently from differing amounts of TV rights.

In this article, the objective is to compare the evolution of TV rights in English and French men's football first divisions over the 1980-2020 period. A comparative analysis on sports broadcasting markets has proved to be insightful.<sup>8</sup> The justifications for the comparison between the English and French leagues are that the UK and French markets are quite similar in terms of overall population (respectively 66m and 66.8m inhabitants in 2017 according respectively to ONS and INSEE) and gross domestic product (respectively \$39,800 and \$39,932 per capita in 2017 according to the International Monetary Fund).<sup>9</sup> This has been true since the beginning and over the period studied with respectively 56.3m and 53.7m inhabitants and \$22,000 and \$27,000 per capita (according to Trading Economics) in 1980, and 58.9m inhabitants for both markets and \$36,000 and \$39,000 per capita in 2000. The demographic structure has also some similarities with one urban area largely more populated than the others (more than 10m inhabitants in London in 2015 in the UK according to City Population, more than 12m inhabitants in Paris in 2013 in France according to INSEE) and several other urban areas with more than or around 1m inhabitants (4 in the UK in 2015 according to ONS, 6 in France in 2013 according to INSEE). With regards to TV rights, broadcast live games appeared almost at the same time in both territories, i.e. in the first half of the 1980s. Since then, the English professional football industry has been characterised by a significant shift in its organisation and administration.<sup>10</sup> French football has also encountered a number of changes over the period studied.<sup>11</sup> The English and French leagues

are also similar in terms of structure with 20 clubs playing 38 games each over a season. The number of clubs and games has always been quite similar over the period, i.e. between 18 and 22 clubs and 34 and 42 games per club. Last, both leagues have been characterised by the existence of an 'historic' domestic broadcaster, Sky for the EPL in the UK and Canal+ for the Ligue 1 in France.

The structure of the article is as follows. The first section briefly reviews the literature on football TV rights in Europe. The second section describes the history of pay-TV football in the UK and France. The third section provides the framework to be tested so as to analyse the evolution of TV rights in English and French football with the identification of the criteria we focus on. The fourth section describes the methodology used. The fifth section presents the results along with their discussion. The sixth and last section concludes.

### **Literature on Football TV Rights in Europe**

The examples of the English Premier League and the French Ligue 1 illustrate the start of league games being broadcast live in the 1980s and the rise of football TV rights since then in Europe, having led to a growing academic interest, mainly since the 2000s. In 2001, Cave and Crandall published an article comparing the competition and efficiency issues in the United States and Europe, focusing mainly on the UK for the latter.<sup>12</sup> In 2002, Boyle and Haynes wrote an essay on some of the changes induced by the new media (particularly the internet, digital television and mobile telephony) in the UK football industry.<sup>13</sup> During the 2000s, three other important contributions to the literature have been the books written by Boyle and Haynes,<sup>14</sup> edited by Jeanrenaud and Késenne<sup>15</sup> as well as written by Gratton and Solberg.<sup>16</sup> In the former, the authors develop further their analysis of the impact of media change on the football industry, with a chapter on the European dimension (e.g. the case of Italy), although their book tackles mainly the UK. In the second aforementioned book, the

chapter by Andreff and Bourg focuses on the impact of TV rights redistribution schemes on competitive balance in European football,<sup>17</sup> while the chapter by Szymanski asks the question ‘Why have premium sports rights migrated to pay TV in Europe but not in the US?’<sup>18</sup> In the latter aforementioned book, Gratton and Solberg provide an in depth analysis of the factors explaining the amounts reached by TV rights, illustrating their analysis with data from North American and European leagues, especially the English Premier League for the latter.

The 2010s have also seen a continual academic interest in football TV rights in Europe. Of particular note is the book by Evens, Iosifidis and Smith.<sup>19</sup> Indeed, it covers a number of national case studies across the world, including Italy, Spain and the UK. However, it does not engage with a comparative analysis. The authors rely on such a comparative analysis in an article published in 2015, with a comparison of the regulation of television sports broadcasting in different countries across the world, including Italy and the UK.<sup>20</sup> It is worth noting that these authors do not focus specifically on football but still provide insights into this sport. Although not explicitly on football, their article published in 2016 analyses the increasingly prominent position of traditional telecommunications companies in the contemporary sports media rights market with examples from the UK (British Telecom), Germany (Deutsche Telekom), France (France Telecom/Orange) and Spain (Telefonica) through companies involved in football.<sup>21</sup>

The latter article does not deal with Italy, the focus of the article published by Di Betta and Amenta on the business model of professional football.<sup>22</sup> The authors compare the individual and collective sales of broadcasting rights (the former having been in place in Italy until 2010) and conclude that, while reducing revenue inequality, the latter institutional design distorts allocative efficiency and informational rent appropriation, opens up costly *ex post* renegotiations and antitrust litigations, and does not improve competitive balance. Another important contribution to the literature looking at business models is the article

published by Boyle on the position of copyright in the arena of sports content rights and property rights of sporting organisations as a highly contested area of legal and commercial interest in the digital age.<sup>23</sup> The author identifies the ramifications of this debate for the existing business models for both rights holders (English Premier League and UEFA) and broadcasters. More recently, the article by Butler and Massey asks the question ‘Has competition in the market for subscription sports broadcasting benefited consumers?’ with a focus on the English Premier League,<sup>24</sup> while Feuillet, Scelles and Durand investigate the existence of a winner’s curse in the bidding process for broadcasting rights in football through the cases of the French and UK markets.<sup>25</sup> As such, they deal with the same markets as the present paper, although their focus is different.

### **The History of Pay-TV Football in the UK and France**

Due to some similarities in the UK and France, the history of pay-TV football in these two countries is tackled in a single section. More exactly, we mainly stress the UK case and draw the similarities (or contrasts) with France.

The economic history of the relationship between television and sport in the UK is long and well established.<sup>26</sup> This symbiotic relationship, where sport provides a valued form of content to media organisations who provide valued revenue to sport, has become what Rowe has characterised as a ‘match made in heaven’.<sup>27</sup> As Evens, Iosifidis and Smith have suggested,<sup>28</sup> following Kuhn,<sup>29</sup> this symbiotic relationship has had three phases of gestation: firstly, a public service monopoly/duopoly first dominated by the BBC and subsequently shared with the commercial regional franchises of ITV; second, following deregulation and privatisation of telecommunications under the 1984 Cable and Broadcasting Act and the 1990 Broadcasting Act, British television saw a period of expansion from the early 1980’s to the mid-1990’s with new free-to-air broadcasters Channel 4 (1982) and Channel 5 (1997) and

new cable and direct-to-home satellite services, most notably British Sky Broadcasting (1990); thirdly, the more recent phase driven by digital television delivery systems across digital terrestrial, digital cable and digital satellite licences. As we shall discuss below, we may now add a fourth phase of UK television development which includes Internet television services, with video-on-demand services and ‘over-the-top’ (OTT) services being developed in a period that Hutchins and Rowe have labelled ‘Networked Media Sport’ in an age of ‘digital plenitude’.<sup>30</sup>

Similar phases can be identified in the French case: firstly, a public monopoly on broadcasting from 1945 to 1974 with the Radiodiffusion Française (RDF) until 1949 then the Radiodiffusion-Télévision Française (RTF) until 1964 and the Office de Radiodiffusion-Télévision Française (ORTF) until 1974 before the ORTF fractured in 1975 in three TV channels (TF1, Antenne 2 and FR3) but, as underlined by Bourg, ‘competition is weak because all three pertain to public service, are not commercial companies and they agree to harmonise their schedule (sharing of sports broadcasts on weekend with Saturday reserved for Antenne 2 and Sunday for TF1)’;<sup>31</sup> second, the evolution of the French television market towards a competitive business with the lifting of the ceiling on advertising revenue for channels,<sup>32</sup> and the notable arrival of a fourth TV channel in 1984, namely Canal+; and a third and fourth phases comparable to the UK case.

Sport, as a form of content that delivers a ‘ready-made audience’, has arguably played a central role in the evolution and development of each of these phases of television. However, the impact of each phase of television has been motivated by quite divergent objectives, as well as creating quite varied and nuanced outcomes both across and within sports.



### *Early TV Sport and Duopoly*

The first phase of television reminds us what the economic transaction between television and sport actually is. In the UK, the BBC paid for a facility fee for the ‘right’ to place their cameras at sport as early as 1937, but it was not until the 1950’s that such fees became regularised in the contractual arrangements between television and sport.<sup>33</sup> The ‘rights’ in question are not intellectual property rights, but a right of access in to the sporting arena to broadcast the event. Governing bodies of sport were, for many years, nervous of the impact of television on their gate receipts, and for a while were particularly worried about what was termed the ‘rediffusion’ of television in public places, such as cinemas. The football authorities were especially concerned, and kept live coverage to a handful of occasions such as the FA Cup final, European club competitions and international matches.<sup>34</sup> Similar concerns existed in France. From 1964-1965, televised live matches occurred in French football. However, on 8 November 1969, Lyon-Rennes which was televised live took place in front of only 894 attendees.<sup>35</sup> This led to the end of televised live matches in French football for 15 years.

As television developed, the rights of access became increasingly competitive in the UK as each broadcaster sought ‘exclusivity’ to cover events. However, to the early regulators of broadcasting exclusivity was deemed antithetical to the broader need to develop the medium among the British population, so to avoid the monopolisation of sport events the Postmaster General introduced an agreed set of ‘listed events’ of major sporting occasions which were deemed to be in the national interest.<sup>36</sup> The net effect of this list was to suppress the value of ‘facility fees’ for the right to televise major events, where both the BBC and ITV shared coverage. This state of affairs structured the duopoly of the BBC/ITV cartel from the mid-1950s to the late-1980s. Competition centred on a ratings war between the two channels televising the same events and leagues, rather than a battle over exclusivity. The cosy-

duopoly over rights was broken in a significant way when ITV bought exclusive rights to live First Division football matches in a four-year deal with the Football League worth £44m from 1988 to 1992.

### ***Deregulation and the Rise of Pay-TV Sport***

In the second phase of television, especially following the launch of Sky, the value of economic rents to televise football took a dramatic turn in the UK. The fortuitous confluence of a newly formed elite English Premier League (organised in the economic interests of a smaller group of 20 clubs rather than the 92 members of the Football League) and the content hungry new pay-TV broadcaster led to a series of exclusive television deals that dwarfed previous contracts for live coverage of football: £191.5m (1992-97) and £670m (1997-01) in this phase of expansion. The popularity of live football on Sky Sports transformed a company that was making a £47m loss in 1992 into a company making £67m profits a year later.<sup>37</sup>

Economically, the new cash injection into the sport helped finance the modernisation of football stadiums across the country, as well as inflate the salaries of leading footballers.<sup>38</sup> With increased volumes of money circulating in the world of English football the game also attracted new investors in clubs, many of whom had moved out of private ownership to public companies with shares trading on the stock market. Among the investors were media companies themselves, with Sky, the cable operator NTL, and ITV franchise holder Granada among the largest investors in clubs, and the management of their media assets.<sup>39</sup> The investment by media companies was partly triggered by regulatory investigations, first by the Office of Fair Trading in 1999 which focused on competition issues related to the collective sale of TV rights to Premier League football, and second, by the European Commission whose competition directorate DG4 also found the joint sale of rights to be a 'horizontal restriction of competition'.<sup>40</sup> The prospect of clubs selling their own television rights led the

Rupert Murdoch backed Sky to launch a £625m takeover bid for the leading club of the period Manchester United in 1998. Although this may have seemed a shrewd strategic decision to control media rights of the Premier League's leading club, the move proved highly controversial with fans and ultimately the regulator the Monopolies and Mergers Commission who intervened and prevented the sale on 'public interest' grounds. This is in contrast with the French case where Canal Plus was allowed to own Paris-Saint-Germain as developed below. Soon after, the OFT ruled that the competitive market for the collective sale of Premier League rights ultimately benefited the consumer, but the leagues dispute with the EC rumbled on in to the third phase of British television.

With regards to the second phase of British television, some similarities can be drawn with the French case where TV rights also increased, although Canal+ enjoyed a monopsony until the end of the 1990s, meaning a situation of bilateral monopoly between the French football league and Canal+. The latter understood that a rivalry for the title between two clubs from large markets was needed to optimize TV audiences. At the end of the 1980s / beginning of the 1990s, Olympique de Marseille (second French market with Lyon behind Paris) was the best French club and one of the best European club, reaching the Champions Cup final in 1991 and winning the Champions League (the new name of the former Champions Cup) in 1993. Its strongest opponent was Monaco (coached by Arsène Wenger), a market which was not optimal with less than 100,000 inhabitants. Canal+ decided to inject money in Paris-Saint-Germain and became shareholders in 1991. The TV channel wished to create a rivalry with Marseille which was compromised by a corruption issue for the latter in 1993 (they paid players from Valenciennes to let them win a game) then their administrative relegation in second division in 1994 and their insolvency in 1995, preventing them to be promoted in first division that year while they won the second division.

### *The Rise of Digital Platforms and Competition for Pay-TV Sport*

Digital television, the third phase of television development, radically broadened the spectrum of available channels and created the potential for more competition in the television marketplace. In the UK, a new competitor to Sky's dominance in football rights was ONDigital, later to be rebranded ITV Digital. Launched in November 1998 ONDigital was the new digital terrestrial television (DTT) license holder, and saw television rights to football as a key strategic aim to gain a foothold in the pay-TV marketplace alongside satellite and cable broadcasters. In June 2000 the television rights for the Premier League, the FA Cup and the Football League all came up for auction, in what turned in to a rights feeding frenzy among the new digital television services Sky, NTL/CableTel and ONDigital. Sky won the rights to the Premier League for a record fee of £1.2bn, they also picked up the FA Cup and England national matches, and in an effort to win at least one of the rights packages ONDigital bought the rights to the Football League for £315m, four times the previous deal with Sky. The inflated cost proved the undoing of the DTT provider which had changed name to ITV Digital, which hit by escalating costs and falling revenues went in to administration in June 2002, only one year in to the three-year television deal with the Football League. Litigation to redeem the remainder of the fee from ITV Digital's creditors ultimately failed due to a lack of parent company guarantees from Carlton and Granada, which left many Football League clubs facing financial ruin and administration.<sup>41</sup>

Sky's success in seeing off competition from a rival pay-TV service was soon checked again by the European competition commissioner's ruling on collective sale of rights by the Premier League. The ruling failed to effect the 2004 rights sale which Sky won for £1.024bn over a three year period, but in 2007 the Premier League were forced to break up their rights bundle in to smaller tranches to enable wider competition for TV rights from other providers. Irish company Setanta successfully bid for a share of the Premier League

rights from 2007-2010 for total fee of £1.7bn, continuing the inflationary spiral of Premier League TV rights. As Setanta sought to broaden their presence in the television sports market they bought rights to Scottish football, the FA Cup and England games, Premier Rugby and the PGA Tour among others. However, the cost of servicing the debt on the capital required to pay for the TV rights deals ultimately became too great, and in 2009 the company ceased trading in the UK and its various TV deals to football were auctioned off cheaply to US sports network ESPN. As with the collapse of ITV Digital before it, Setanta's demise left significant financial holes in the budgets of major sports organisations, and football clubs, and left Sky to maintain its hegemony in the television football market.

Some similarities can be found in the French case, although no TV channel went into administration. In 1999, TPS won the right to broadcast some French games, ending the monopsony of Canal+. However, the latter recovered its exclusivity for the 2005-2008 period with an offer of €600m per season then absorbed its competitor. French football was under the threat that Canal+ – which stopped its ownership of Paris-Saint-Germain in 2006 – became alone again on the supply side and reduced its next offer, similar to Sky in the UK in 2004. Canal+ indeed reduced its offer for the 2008-2012 period (€465m per season) but Orange (telecommunication company) emerged on the supply side and won the right to broadcast some French games for an offer of €203m per season, meaning that the overall TV rights continued to grow. The entry of Orange on the market is related to the fourth phase of television.

### ***Developments in Internet Protocol Television and New Markets/Competition for TV Sport***

The beginnings of what might be characterised as a fourth phase of television centres on the development of Internet Protocol Television (IPTV) services which began to be marketed in the UK and in France during the first decade of the 21<sup>st</sup> century when telecommunications

companies, such as BT Vision and Orange, began to provide television packages using their broadband service from 2006 and 2003, respectively.

BT Vision carried live pay-TV football via deals with Setanta and subsequently ESPN, and from Sky Sports following a ruling by regulator Ofcom in July 2010 which forced Sky to reduce the wholesale price of its premium sports channels by 23.4% which were previously viewed as a form of restrictive practice against competitors. Buoyed by renewed competition in sports rights, BT's most significant move in the world of televised football came in 2012 when it successfully won the rights to 38 live Premier League matches per season from 2013-16. Most crucially, this included the right for 18 'first choice' matches. This initial deal, worth £738m, was modestly expanded further to 42 games per season from 2016-2019 for £960m. The most dramatic strategic change to live football rights in the UK came with BT Sports exclusive acquisition of UEFA Champions League games in 2013 for £897m. The move broke nearly two decades of dominance by ITV and Sky in the coverage of the competition in the UK, and moved BT in alignment with Sky in terms of its attractiveness to pay-TV customers.

The fierce competition for television rights to premium football between Sky and BT has emphasised the importance of sport to drive new customers in to their businesses. BT's key strategic move has been to bundle its sports channel offering free with broadband and telephony services. This 'triple play' of television, broadband and telephony now characterises the entertainment and telecommunications market in the UK, where inflated rights to premium sport content has become a 'loss leader' to lucrative digital media household markets which are now more complex and diverse in their offers. In to this new digital media landscape global Internet corporations such as Google (via YouTube), Facebook, Netflix and Amazon are also competing to deliver Video-on-Demand and Over-The-Top services which also have the capacity to stream or broadcast live sports content. In

this respect, the market for premium live televised football in the UK is likely to remain complex and constantly in flux for the foreseeable future.

By contrast with the UK case, Orange stopped to broadcast French football games in 2012. Once again, French football was under the threat of Canal Plus recovering its monopsony but the Qatari channel Al-Jazeera (become BeIN) arrived in the French market when Qatar Tourism Authority became owner of Paris-Saint-Germain in 2011.

### **Framework to Be Tested**

The framework to be tested is based on the core claims below for a domestic TV channel and a domestic league, some of them derived from previous literature. The main variables we will focus on in the following analysis are numbered and in bold. Initially, we consider that the domestic TV channel is alone on the domestic market or has largely more market power than the other domestic channels and no real domestic competition but is in indirect competition with foreign channels to enable the domestic league to attract the best players. More specifically, its starting point is to meet the demand from domestic TV viewers that can be considered as watching the best possible matches, preferentially in their domestic league and with domestic players:

- So as to meet the demand from TV viewers, the TV channel's objective is to broadcast the best possible matches thus the **best clubs and players in the world (1)**,<sup>42</sup> including the **best domestic players (2)**.<sup>43</sup>
- Having the best players requires being able to pay the best salaries so domestic clubs needs more revenue than foreign clubs (to simplify, we do not consider domestic taxes).
- A TV channel is ready to spend more money if it has the **financial ability (3)** to do so, the football domestic league is a **core product (4)** for it and this allows domestic

clubs to attract the best players in the world, meaning that these clubs must already have revenue comparable or close to foreign clubs.

- As a consequence, domestic clubs need **large investments and revenue beyond domestic TV rights (5)** to attract even more of the latter.
- In particular, domestic clubs need **large stadium attendance (6)**, which is also required for telegenic purposes (along with a stadium appropriate for broadcasting) thus by the TV channel since a large crowd is more likely to generate a great atmosphere with a positive impact on TV viewers' experience.<sup>44</sup>
- Having the best clubs and players should lead to **continental competitiveness (7)** for its domestic league, which should increase its perceived quality by TV viewers and sporting prizes (a better continental performance means more positions qualifying for the European competitions in the domestic league) thus be beneficial for the TV channel.
- Continental competitiveness may also be required per se by the TV channel as it may broadcast continental matches and their audiences are better with successful domestic clubs.
- Eventually, we reintroduce competition between TV channels so a TV channel also needs to offer more money than its **domestic competitors (8)** to get TV rights.

For a domestic league:

- Its objective is to have the best possible matches and competitive clubs in continental competitions, consistent with TV channels and viewers' expectations.
- Competitive domestic clubs in continental competitions can require that a few clubs or even only one club – **the driving force (9)** – has the best players, contradictory



with the necessity of outcome uncertainty which is well documented in the literature,<sup>45</sup> and especially the necessity of **uncertainty for the title (10)**.<sup>46</sup>

- The league needs a sufficiently equalitarian sharing of its TV rights to generate outcome uncertainty and / or to limit its **number of clubs (11)** so as to avoid that some have too limited financial resources compared to others and / or to make sure that its best clubs will benefit from a large amount of TV rights. Besides, fewer clubs means fewer matchdays, which is better for TV channels as it is likely that more matches will be played on weekends with a positive impact on audiences.<sup>47</sup>
- The league needs to optimise its TV rights to be able to have both competitive and relatively equal clubs, at least for its best clubs.
- TV rights optimisation needs domestic but also international TV rights optimisation with the selling and marketing of these rights by sports promoters operating in an increasingly global marketplace.<sup>48</sup>
- International TV rights optimisation requires reaching a maximum number of countries.
- Reaching a maximum number of countries is partially consistent with having the best players in the world (reaching the countries with the best players in the world) but also suggests attracting players from **markets with high potential for TV rights (12)**,<sup>49</sup> even if these players are not among the best in the world. It is worth noting that this strategy can be temporal: once a market is interested in a league, it may be not necessary to attract players coming from this market anymore.
- A league can generate more competition with an **appropriate packaging (13)**.<sup>50</sup>
- The **number of live games (14)** offered by the league can also increase competition.
- **Timing (15)** is also important: should a league negotiate TV rights just before a new period or earlier?

- Eventually, the league also needs to be able to allocate as many TV rights as possible to its clubs (no or limited need to allocate a part of them to clubs in other divisions / sports), which is related to its **independence (16)**. As mentioned in the previous section, French TV rights are shared not only between first division clubs but also with second division clubs and amateur sport. Eventually, only 78% of national TV rights are for Ligue 1 clubs. By contrast, the EPL is independent since its breakaway with lower professional divisions in 1992. This does not mean that 100% of national TV rights are for EPL clubs. Indeed, since the breakaway, the EPL has provided a small amount to maintain clubs' youth-development programmes and, since 2001, it has sliced a percentage of its TV deals to the Football Foundation, principally to improve neglected football facilities nationwide.<sup>51</sup> Parachute payments are also distributed to clubs relegated from the EPL. In this article, the amounts under consideration are those going to EPL and Ligue 1 clubs, not the overall TV rights before distribution.

## **Methodology**

Based on the previous criteria, the objective is to compare the evolution of TV rights in English and French football over the 1980-2020 period. Although no TV rights were paid for live matches before 1983, the criteria will be analysed for the 1980-1983 sub-period. The reason is that TV rights for a given period are related, among other causes, to the quality of a league and what happened in terms of TV competition during the previous period. The methodology is based on correlations between TV rights and their possible explanatory variables. Some have explicit values (e.g. attendance) but for most of them, it is necessary to consider whether a criterion is met or not, allocating a value according to this (1 if met, 0 if not). As some criteria are not fully met, not fully not met, they will be allocated 0.5. Data

come from Gratton and Solberg, The Swiss Ramble and Vrooman for the EPL,<sup>52</sup> and LNF (Ligue Nationale de Football) / LFP (Ligue de Football Professionnel) reports for the Ligue 1,<sup>53</sup> unless specified otherwise. Financial data being presented in euros, exchange rates are applied to amounts initially in pounds, based on the website fxtop.com.<sup>54</sup> So as to evaluate as objectively as possible the different variables, clear and consistent rules have to be set:

- (1) Quality of foreign players: 1 if best players in the world, 0.5 if not all best players in the world, 0 otherwise.
- (2) Quality of domestic players: 1 if evidence (qualification for the main national team competitions, the FIFA World Cup and the UEFA Euro) and best domestic players in the domestic league, 0.5 if evidence but not all best domestic players in the domestic league, 0 if no evidence or evidence but most of the best players not in the domestic league.
- (3) TV channel's financial ability: turnover (official reports for Sky, several sources for Canal +).<sup>55</sup>
- (4) Football domestic league = core product: audiences.
- (5) Ability to attract investors and revenues beyond TV rights: 1 if dominant league from an economic point of view without taking into account TV rights or evidence of large investments, 0.5 if ability without being the dominant league or evidence of large investments, 0 otherwise.
- (6) Stadium attendance: data from European Football Statistics.<sup>56</sup>
- (7) Continental competitiveness: UEFA ranking from Kassies.<sup>57</sup>
- (8) Competition between TV channels: 1 if at least three competitors, 0.5 if two, 0 if only one.
- (9) At least one economically and sportingly strong team, the driving force: 1 if met, 0 if not.

- (10) Convincing domestic rivals so as to generate uncertainty for the title: 1 if at least two rivals or only one rival but with high potential (e.g. high attendance / big city), 0.5 if only one rival with limited potential (e.g. low attendance / small city), 0 if not.
- (11) Appropriate number of clubs: this depends on several factors such as the position of the league and its best clubs in the economic continental hierarchy since a strongly dominant league can have more clubs sharing its TV rights without compromising its best clubs' economic position; or the number of weekends / holidays when matchdays can be organised (e.g. Boxing Day in the UK).
- (12) Markets with high potential for TV rights: 1 if Asia and the United States are reached, 0.5 if only one of these two markets is reached or none of them but some others with good potential (e.g. France for the English Premier League), 0 otherwise. As an alternative for the quality of foreign players and players from markets with potential for TV rights, we also consider the percentage of foreign players.<sup>58</sup> This percentage is supposed to have been highly impacted by the Bosman Case (1995).
- (13) Packaging: number of packages.
- (14) Number of live games.
- (15) Timing: how long before the period covered has a deal been agreed? It is worth noting that timing impacts the information that has to be taken into account for our criteria. Indeed, if TV rights in period  $t$  were negotiated one year before the new deal, the last season of period  $t-1$  has not to be considered since it cannot influence these TV rights; if TV rights depend on the number of current TV viewers as it was the case in French football between 1984 and 1987,<sup>59</sup> this is period  $t$  that has to be taken into account to explain TV rights in  $t$ .
- (16) Independence: 1 if met or to come, 0.5 if signs that this could occur, 0 if not.

For the criteria taking the values 1, 0.5 or 0, the decision to allocate a specific value can be straightforward or a matter of qualitative assessment based on available and collected evidence. Such evidence is available as supplemental file (see Appendices 1 to 4) so that the reader can understand the rationale behind our choices.

## **Results and Discussion**

### ***Brief Description of the Evolution of TV Rights over the 1980-2020 Period***

First of all, we briefly describe the evolution of TV rights going to English and French men's football first division clubs over the 1980-2020 period. Figure 1 shows the huge increase for England, particularly from 2007-2008 with the gap with France having always increased since then (the decrease for England in 2008-2009 and 2009-2010 is due to the parity pound-euro, not an actual decrease in pounds since annual TV rights were the same over the 2007-2010 period; the same applies from 2017-2018). From 1992-1993 to 2006-2007, TV rights were always larger in England than France but the latter was able to partially fill the gap when it increased. It is difficult to really know how TV rights evolved before 1997 based on Figure 1. This is the reason why Figure 2 focuses on the 1980-1997 period only. During the latter, TV rights were much closer between the two leagues with the French league being able to fill the gap appeared in 1992-1993 – when the Premier League was created and Sky won TV rights for the first time – at the end of the period.

Figure 1

Figure 2

### ***Data and Correlations***

Table 1 provides the data related to TV rights and their supposed explanatory variables ( $n = 27$  observations; 13 for England and 14 for France). It must be noted that all annual domestic audiences could not be found. As a consequence, all average domestic audiences could not be calculated, this is the reason why they are not reported here. However, domestic audiences are discussed in a dedicated subsection later. Data for TV rights, timing, number of live games, packages and clubs are those for  $t+1$ . Indeed, TV rights in  $t+1$  are determined mainly by elements in  $t$ , except for those specified here and in France from 1984 to 1987 (see explanation for timing in the methodology section). Because the timing may be at another time than the very end of period  $t$  (e.g. one year before), the data likely to explain TV rights in  $t+1$  and as such taken into account for period  $t$  do not include those after the timing (i.e. the last season of period  $t$  when the timing is one year before the end of period  $t$ ). Based on the elements in Table 1, one might have the feeling that most of the explanatory variables have improved in parallel with TV rights, especially for England. The best way to confirm this is to observe the correlations between variables.

Table 1

Table 2 shows that most of the explanatory variables have a significant positive impact on TV rights (the negative sign for UEFA ranking means a positive impact as it is better to be ranked 1<sup>st</sup> than 2<sup>nd</sup> which is better than 3<sup>rd</sup> and so on). The variables that have not a significant impact on TV rights are the number of live games, the quality of domestic players, driving force, domestic rivals, the number of clubs and an appropriate number of clubs. For driving force and domestic rivals, a main reason is that almost all periods have a value equal to 1, meaning that these two variables are not sufficiently discriminating in England and France over time. For the number of clubs, a reason is that 20 clubs in England

is not the same as 20 clubs in France given their respective situation (England more likely to share TV rights between 20 clubs with limited economic impact on its best clubs regarding its economic position and its independence) and more attractive possibilities for broadcasting games in England due to the absence of a winter lull. When considering an appropriate number of clubs for England alone, there is a significant positive impact. There is also a significant positive impact of the number of live games for England alone. Interestingly, there is a significant negative impact of the quality of domestic players for France alone. An explanation is that TV rights increased after the 1998 World Cup in and won by France but also after the Euro 2000 also won by France, whereas most of its best players left the domestic league after the Bosman Case in 1995. This could translate an increase in football demand from French people due to France national men's football team success, independent of whether the best French players operate in the domestic league or not. This interpretation is consistent with the increase in overall audiences for the French football first division over the 1998-2002 period, when 306 games were broadcast per season (all games with 18 clubs): from 49m in 1998-1999 to 92m in 2001-2002 (almost doubled).

Table 2

### ***Main TV Channel's Turnover***

The explanatory variable with the strongest correlation with TV rights is the main TV channel's turnover. Figure 3 shows the evolution of the turnover for Sky in the UK and Ireland and Canal+ in France over the 1990-2016 period, from more than six times larger for Canal+ in 1990-1991 to more than six times larger for Sky in the UK and Ireland in 2015-2016. The very strong correlation between TV rights and main TV channel's turnover suggests the possibility of a virtuous circle: broadcasting football games allows a TV channel to increase its customer base and its turnover, meaning that it can invest in turn more money

in football so that clubs can attract better players (consistent with the strong correlation between the main TV channel's turnover and the percentage of foreign players, the strongest between explanatory variables), increasing the attractiveness of the league and thus new customers for the TV channel. This is what happened in English football (even if Sky decreased its investment for the 2004-2007 period when it did not face competition) but not in French football. A reason is competition between English and French football, with the latter not able to spend as much money in players as the former. This means that English clubs can attract the best players operating in the French league. It is worth noting that English clubs can rely not only on large domestic TV rights but also large international TV rights, including from France and, until 2016, Canal+. Thus, the French TV group provided €63m per season for the EPL over the 2013-2016 period.

Figure 3

### ***Domestic Audiences***

As written earlier, we could not find all annual domestic audiences. Nevertheless, some of them could be accessed over the 1996-2014 period (Table 3). From 2000-2001 to 2003-2004, overall audiences for France were larger than England but its average audiences were four to five times smaller. In 2004-2005 and 2005-2006, overall audiences were even smaller for France in spite of much more broadcast games for which data were available (380 *versus* 88 for England). In 2006-2007, overall audiences were again larger for France then the number of TV audiences available for England increased (to 137 in 2007-2008) and even if this number was still smaller than France, overall audiences for England were larger again. The fact that the French Professional League (LFP) has stopped the publication of Ligue 1 overall audiences from 2008-2009 lets think that they have decreased compared to 2007-2008. In 2012-2013, the average audience for the main game of each matchday (38 games) decreased



to 1.1m in Ligue 1, an average not strongly larger than the one for the 154 broadcast games (four times more games) in EPL in 2013-2014. This is consistent with the idea that EPL has much more games with high potential for large audiences than the French Ligue 1. In the French context, it is also important to consider the development of the rugby Top 14, able to achieve an average domestic audience for all its games (not only for the main game of each matchday) between 700,000 and 800,000 over the 2008-2013 period in spite of days or at least times not as optimal as for football.<sup>60</sup> Top 14 average audiences were slightly decreasing in 2013-2014, a decrease mainly due to ‘a very strong competition from the Premier League that year’.<sup>61</sup>

### Table 3

#### **Conclusion: English Premier League’s Virtuous Circle**

This article aimed at comparing the evolution of TV rights in English and French men’s football first divisions over the 1980-2020 period. It showed that a lot of explanatory variables for the amount of TV rights are positively correlated, suggesting the existence of a virtuous circle, at least for the English Premier League. Such a virtuous circle is represented in Figure 4. This can be simplified as follows: independence and competition between TV channels => more money => better clubs => more potential live games => more competition between TV channels => more money. Before commenting further on Figure 5, it is worth mentioning that English club football was in a very bad situation in the 1980s: attendances were falling down (from more than 31,000 in 1972 to less than 19,000 in 1984) due to old stadia and hooliganism; English clubs have been banned from European competitions for five years following the Heysel disaster in 1985; and the Hillsborough disaster in 1989 was the most serious tragedy in UK sporting history. The latter induced the Taylor Report,<sup>62</sup> which eventually led to all-seat arenas from 1994-1995. The Taylor Report was one determining

factor triggering the English Premier League success, along with English clubs coming back in European competitions in 1990 (meaning that top positions in the league could qualify again for continental competitions), and independence and Sky winning TV rights in 1992.

#### Figure 4

The Bosman Case (1995) and the Euro 1996 in England were two other beneficial factors during the 1990s as was the evolution of the Champions League from only one club per country (except if its winner was not champion in its domestic league) to four clubs for the best countries from 1999, along with more money shared on the basis of the TV pool (TV domestic market) rather than sporting performance and equality between countries. In 2003, Sky faced no competition for national TV rights that slightly decreased for the period 2004-2007 in spite of more than twice more broadcast games. This was 'seen by many as an indicator that the boom time for broadcasting rights was over'.<sup>63</sup> However, the European Commission insisted that at least one of the packages offered for the 2007-2010 period went to a different broadcaster. This generated again competition between TV channels which is even more intense with BT being in the market since 2012. Coupled with more international TV rights, these elements explain the English Premier League's virtuous circle.

Some questions for the future are whether the English Premier League will sustain this virtuous circle on the long term while domestic TV rights will decrease over the 2019-2022 period and the French Ligue 1 will generate such a virtuous circle following the arrival of Neymar at Paris-Saint-Germain in 2017. For the latter, domestic TV rights will considerably increase over the 2020-2024 period (€1.153bn per year, +60%), with MediaPro and BeIN Sports putting Canal + out of the broadcasters.<sup>64</sup> It remains to observe whether international TV rights will enjoy a similar increase while a deal has been agreed with BeIN Sports for a minimum of €80m per year over the 2018-2024 period.

## Disclosure Statement

No potential conflict of interest is reported by the authors.

## Notes

1. 'Premier League Rights: Sky'.
2. Harris, 'Premier League May Earn'.
3. 'Premier League Rights: Amazon'.
4. Biddiscombe, 'Analysis: Has Amazon Scored'.
5. The Guardian, 'Sky Netted a Sweet'.
6. Gratton and Solberg, *Economics of Sports Broadcasting*, 4–5.
7. Le Parisien, 'Droits TV Ligue 1'; Letennier, 'Dossier Maxifoot'.
8. Smith et al., 'Regulation of Sports Broadcasting'.
9. Population and GDP per capita indicate more similarities between England and France than between these countries and Germany (82.7m inhabitants and \$44,769), Italy (60.5m inhabitants and \$31,996) and Spain (46.5m inhabitants and \$28,358). This justifies why a comparison between the English Premier League and the French Ligue 1 has been favored rather than with the German Bundesliga, the Italian Serie A and the Spanish La Liga.
10. Hamil and Walters, 'Financial Performance English Football'; Walters and Hamil, 'Contests Power and Influence'.
11. Dermit-Richard et al., 'French DNCG versus UEFA'; Scelles et al., 'Insolvency in French Soccer'.
12. Cave and Crandall, 'Sports Rights Broadcast Industry'.
13. Boyle and Haynes, 'New Media Sport'.
14. Boyle and Haynes, *Football New Media Age*.
15. Jeanrenaud and Késenne, *Economics of Sport Media*.
16. Gratton and Solberg, *Economics of Sports Broadcasting*.
17. Andreff and Bourg, 'Rights Competition European Football'.
18. Szymanski, 'Why Have Premium Sports'.
19. Evens et al., *Political Economy Sports Rights*.
20. Smith et al., 'Regulation of Sports Broadcasting'.

21. Smith et al., 'The Next Big Match'.
22. Di Betta and Amenta, 'Media as Policy Instrument'.
23. Boyle, 'Battle for Control?'
24. Butler and Massey, 'Has Competition Benefitted Consumers?'
25. Feuillet et al., 'A Winner's Curse'.
26. Haynes, *BBC Sport Black White*.
27. Rowe, *Global Media Sport*.
28. Evens et al., *Political Economy Sports Rights*.
29. Kuhn, *Politics Media in Britain*.
30. Hutchins and Rowe, *Beyond Television Sport*.
31. Bourq, 'Relations Économiques Sport Télévision', 213.
32. Bourq and Gouguet, *Économie du sport*.
33. Haynes, *BBC Sport Black White*.
34. Haynes, 'Pageant Sound and Vision'.
35. Constant, 'Canal+ Coup d'Envoi'.
36. Barnett, *Games and Sets*.
37. Conn, *The Beautiful Game?*
38. Horrie, *Premiership: Lifting the Lid*'.
39. Boyle and Haynes, *Football New Media Age*.
40. Toft, 'TV Rights Sports Events', 8.
41. Boyle and Haynes, *Football New Media Age*.
42. Buraimo and Simmons, 'Uncertainty or Star Quality?'
43. Gratton and Solberg, *Economics of Sports Broadcasting*.
44. Solberg and Mehus, 'Challenge of Attracting Fans?'
45. Andreff and Scelles, 'Walter C. Neale'; Scelles et al., 'Competitive Balance versus Intensity'.
46. Scelles, 'Quality and Competitive Balance?'; Scelles et al., 'Do All Sporting Prizes'.
47. Buraimo and Simmons, 'Uncertainty or Star Quality?'
48. Boyle and Haynes, 'New Media Sport'.

49. Gratton et al., *Global Economics of Sport*.
50. Bolotny and Bourg, 'Demand for Media Coverage'; Gratton and Solberg, *Economics of Sports Broadcasting*.
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60. Autorité de la Concurrence, 'Décision n° 14-MC-01'.
61. Autorité de la Concurrence, 'Décision n° 14-MC-01', 25.
62. Taylor, 'The Hillsborough Stadium Disaster'.
63. Gratton and Solberg, *Economics of Sports Broadcasting*, 5.
64. 'Droits TV Canal+'.

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## Figures

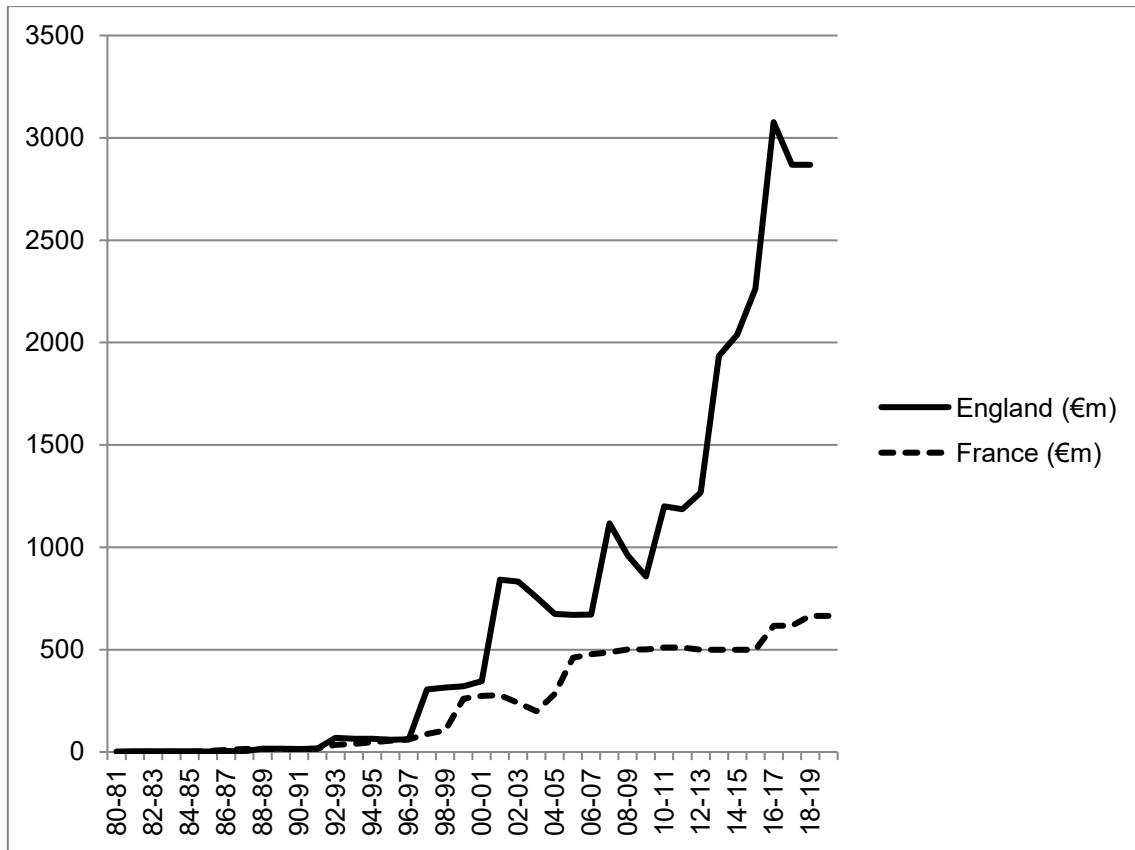


Figure 1. Evolution of TV rights going to English and French men's football first division clubs, 1980-2020.

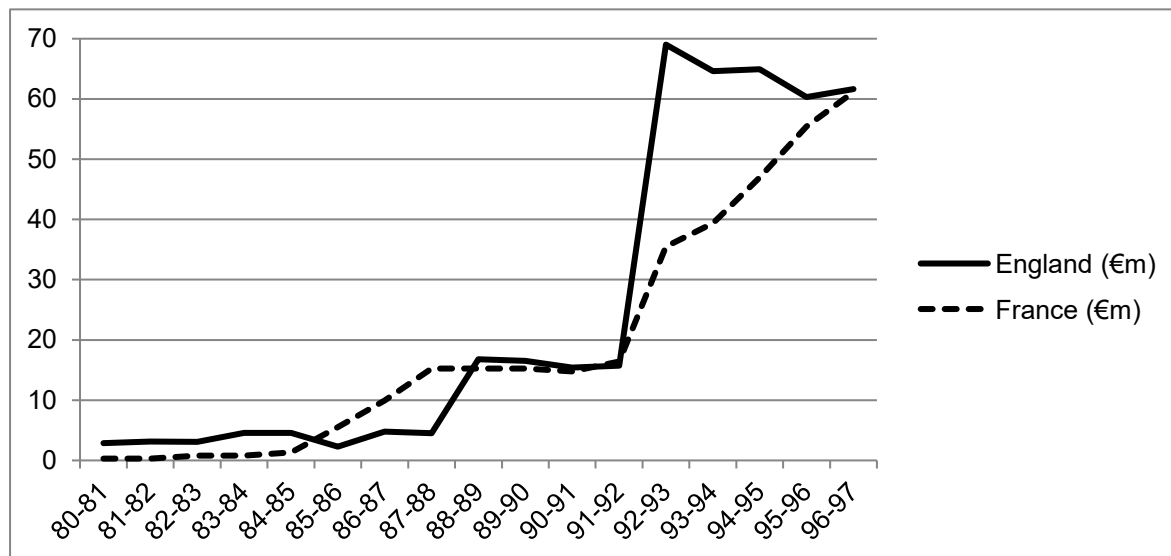


Figure 2. Evolution of TV rights going to English and French men's football first division clubs, 1980-1997.

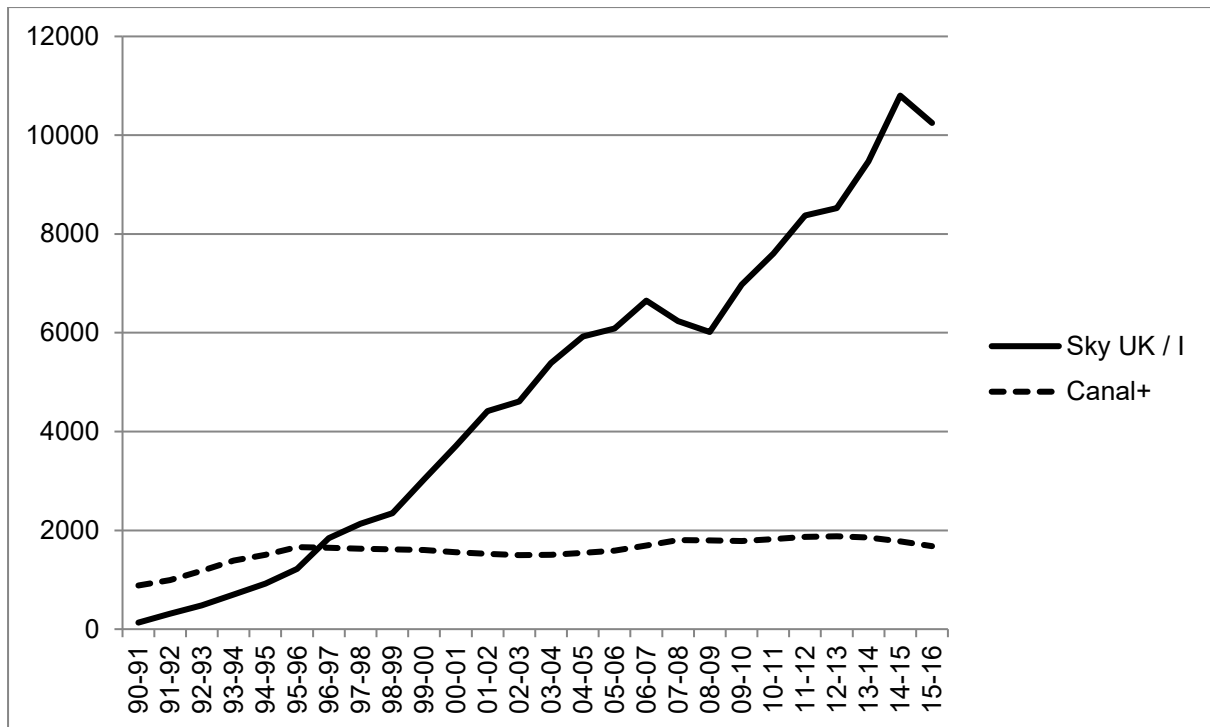
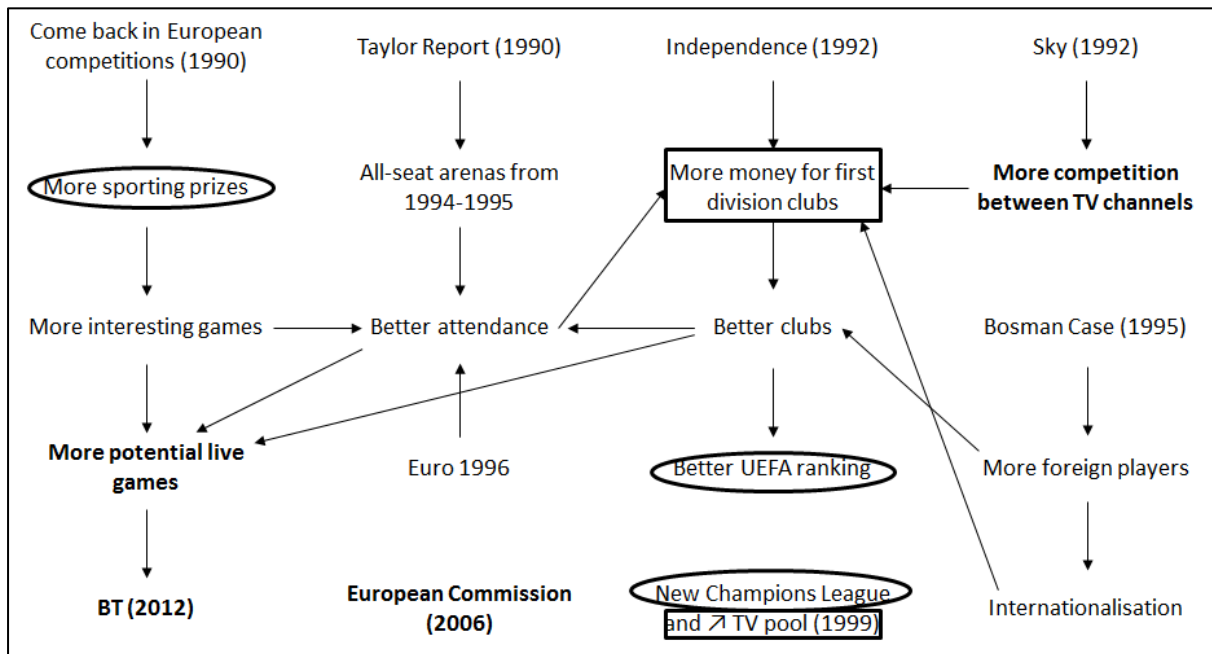


Figure 3. Evolution of the turnover for Sky in the UK and Ireland and Canal+ in France, 1990-2016 (in €m).



Circled components are connected to each other; the same applies to framed components; this is also the case for components in bold.

Figure 4. English Premier League's virtuous circle: positive influence of independence, domestic and European environments, and internationalisation.

## Tables

Table 1. Data.

	TV rights in t+1 (€m)	Timing for TV rights t+1	Number of live games t+1	Number of packages t+1	Quality of foreign players	Quality of domestic players	Turnover ITV 1986-96 then Sky / Canal + (€m)	Economic position	Attendance	UEFA ranking	Competition	Driving force	Domestic rivals	Number of clubs t+1	Appropriate number of clubs t+1	International markets	% of foreign players	Independence
England																		
1980-83	4.56	0	10	1	0	1	0	0.5	20127	3	0	1	1	22	0	0	2%	0
1983-85	7.39	0	10	1	0	1	0	0.5	21080	1	0	1	1	22	0	0	1%	0
1985-86	2.28	0	6	1	0	0	0	0	19563	33	0	1	1	22	0	0	2%	0
1985-86	4.63	0	14	1	0	0	0	0	19563	33	0	1	1	22	0	0	2%	0
1986-88	16.12	0	18	1	0	0	1428.31	0	19273	33	0.5	1	1	20	1	0	1%	0.5
1988-92	64.10	0	60	1	0	1	1850.56	0.5	21622	13	1	1	1	22	0	0	3%	1
1992-97	322.16	1	60	1	0.5	1	1967.62	1	27550	7	1	1	1	20	1	0.5	34%	1
1997-01	809.77	1	106	2	0.5	1	2920.11	1	30757	5	1	1	1	20	1	0.5	40%	1
2001-04	671.76	1	138	4	0.5	0.5	4837.94	1	34448	2	0	1	1	20	1	1	50%	1
2004-07	978.46	1	138	6	0.5	1	6076.82	1	33864	3	1	1	1	20	1	1	55%	1
2007-10	1217.94	1.5	138	6	0.5	1	6490.78	1	35614	1	1	1	1	20	1	1	61%	1
2010-13	2078.72	1	154	7	0.5	1	8101.66	1	34600	1	1	1	1	20	1	1	65%	1
2013-16	2937.64	1.5	168	7	0.5	0.75	9597.89	1	36179	2	1	1	1	20	1	1	68%	1
France																		
1980-83	0.3	0	0	1	0	0.5	0	0.5	10886	8	0	1	1	20	1	0	10%	0
1983-84	0.8	0	0	1	0	0.5	0	0.5	10084	10	0	1	1	20	1	0	10%	0
1984-85	1.32	0	6	1	0.5	0.5	41.31	0.5	9906	11	0	1	1	20	1	0	10%	0
1985-86	5.5	0	25	1	0.5	0.5	189.42	0.5	10156	15	0	1	1	20	1	0	10%	0
1986-87	9.9	0	25	1	0.5	0	403.38	0.5	11425	14	0	1	1	20	1	0	10%	0
1986-87	15.25	0	38	1	0.5	0	403.38	0.5	11425	14	0	1	1	20	1	0	10%	0
1987-92	45.3	0	106.4	1	0.5	1	1345.75	0.5	11493	5	0	1	1	20	1	0	10%	0
1992-97	92.4	0	306	1	0	0	1645.69	0	14163	3	0	1	1	18	1	0	18%	0
1997-99	220.6	0	343	4	0	0	1615.96	0	19941	4	0.5	1	1	18	1	0	22%	0
1999-04	368	2	380	3	0.5	0	1525	0	21755	5	0.5	0	1	20	0	0.5	31%	0
1999-05	475	0.5	380	4	0.5	0	1523.25	0	20178	5	0.5	1	0.5	20	0	0.5	36%	0
2005-08	506	0.5	380	12	0.5	0	1748	0	21841	5	0.5	1	0.5	20	0	0.5	33%	0
2008-12	500	1	380	11	0.5	0	1822	1	19742	5	0.5	1	1	20	0	0.5	38%	0
2012-16	628	2	380	6	0.5	0	1856	1	20953	6	0.5	1	0.5	20	0	0.5	41%	0

Table 2. Correlations.

	Timing for TV rights t+1	Number of live games t+1	Number of packages t+1	Quality of foreign players	Quality of domestic players	Turnover	Economic position	Attendance	UEFA ranking	Competition	Driving force	Domestic rivals	Number of clubs	Appropriate number of clubs	International markets	% of foreign players	Bosman case	Independence
TV rights in t+1 (€m)	0.65**	0.27 (0.80** EPL)	0.58**	0.45*	0.32 (-0.57* Ligue 1)	0.94**	0.55**	0.77**	-0.43*	0.67**	0.02	-0.05	-0.17	0.21 (0.61* for EPL)	0.83**	0.87**	0.61**	0.63**
Timing for TV rights in t+1		0.54**	0.56**	0.60**	0.10	0.62**	0.53**	0.67**	-0.44*	0.62**	-0.44*	-0.26	-0.18	-0.10	0.81**	0.81**	0.76**	0.44*
Number of live games t+1			0.68**	0.34	-0.42*	0.23	-0.10	0.21	-0.45*	0.31	-0.33	-0.60**	-0.51**	-0.33	0.39*	0.49**	0.78**	-0.12
Number of packages t+1				0.47*	-0.11	0.54**	0.29	0.49*	-0.41*	0.47*	0.01	-0.46*	-0.23	-0.21	0.67**	0.70**	0.68**	0.18
Quality of foreign players					0.09	0.44*	0.52**	0.31	-0.41*	0.35	-0.15	-0.27	-0.29	0.21	0.62**	0.65**	0.49**	0.28
Quality of domestic players						0.41*	0.61**	0.44*	-0.44*	0.40*	0.20	0.36	0.28	0.27	0.30	0.24	-0.02	0.63**
Turnover							0.58**	0.85**	-0.44*	0.71**	0.05	0.06	-0.23	0.33	0.88**	0.89**	0.63**	0.78**
Economic position								0.54**	-0.49**	0.46*	0.26	0.17	-0.01	0.33	0.62**	0.62**	0.33	0.64**
Attendance									-0.36	0.75**	-0.02	0.002	0.04	0.04	0.88**	0.81**	0.68**	0.83**
UEFA ranking										-0.31	0.09	0.14	0.39*	-0.14	-0.51**	-0.59**	-0.59**	-0.24
Competition											-0.05	-0.09	-0.12	0.07	0.68**	0.69**	0.63**	0.77**
Driving force												-0.07	0.04	0.26	-0.09	-0.06	-0.19	0.14
Domestic rivals													0.08	0.46*	-0.17	-0.20	-0.34	0.25
Number of clubs														-0.60**	-0.18	-0.37	-0.53**	0.01
Appropriate number of clubs															0.13	0.22	0.03	0.36
International markets																0.96**	0.78**	0.70**
% of foreign players																	0.85**	0.63**
Bosman case																		0.42*

\* and \*\* mean significant at the 5% and 1% threshold, respectively.

Table 3. Domestic audiences in English and French men's football first divisions, 1996-2014 (in million).

	England			France		
	Overall	Games <sup>1</sup>	Average	Overall	Games	Average
1996-1997	91.2	60	1.52	-	-	-
1997-1998	-	-	-	-	-	-
1998-1999	-	-	-	49.2	306	0.16
1999-2000	-	-	-	57.5	306	0.19
2000-2001	65.4	60	1.09	83.0	306	0.27
2001-2002	77.2	66	1.17	92.1	306	0.30
2002-2003	89.8	66	1.36	104.5	380	0.28
2003-2004	89.8	66	1.36	105.5	380	0.28
2004-2005	107.4	88	1.22	105.6	380	0.28
2005-2006	106.5	88	1.21	103.7	380	0.27
2006-2007	103.8	88	1.18	111.3	380	0.29
2007-2008	134.3	137	0.98	112.5	380	0.30
2008-2009 <sup>2</sup>	-	-	-	64.6	38	1.7
2009-2010 <sup>2</sup>	-	-	-	57.0	38	1.5
2010-2011 <sup>2</sup>	-	-	-	60.8	38	1.6
2011-2012 <sup>2</sup>	-	-	-	53.2	38	1.4
2012-2013 <sup>2</sup>	-	-	-	41.8	38	1.1
2013-2014	160.9	154	1.04	-	-	-

<sup>1</sup> Data not available for all games for England, explaining some differences compared to the number of games broadcast.

<sup>2</sup> Main game of each matchday only.

Sources: Autorité de la concurrence, Buraimo and Simmons, Gratton and Solberg, Harris and LNF / LFP.

Autorité de la Concurrence, 'Décision n° 14-MC-01'; Buraimo and Simmons, 'Uncertainty of Outcome or Star Quality?'; Gratton and Solberg, *The Economics of Sports Broadcasting*, 34-35; Nick Harris, 'Man United and Liverpool Remain Top TV Draws Despite 2013-14 Without Trophies', *Sporting Intelligence*, July 21, 2014, <http://www.sportingintelligence.com/2014/07/21/man-united-and-liverpool-remain-top-tv-draws-despite-2013-14-without-trophies-210703>; LNF / LFP, 'Rapports Annuels'.

Appendix 1. TV rights and characteristics of English and French football first divisions, 1980-1987.

	1980-1983		1983-1984		1984-1985		1985-1986		1986-1987	
	England	France	England	France	England	France	England	France	England	France
Annual TV rights / domestic competition	£1.67m (€3.04m) <sup>1</sup> BBC & ITV	€0.30m 1979-1982 TF1	£2.6m (€4.6m) BBC & ITV	€0.8m TF1	£2.6m (€4.5m) BBC & ITV	€1.32m <sup>1</sup> TF1 & Canal +	£1.3m (€2.3m) <sup>2</sup> BBC	€5.5m <sup>1</sup> TF1 & Canal +	£3.15m (€4.8m) BBC & ITV	€9.9m <sup>1</sup> TF1 & Canal +
Timing rights t+1	1983	1982 or 1983	1983	1984-1985	1985	1985-1986	1986	1986-1987	1988	1987
Driving force(s)	Liverpool	Saint-Etienne (till 82)	Liverpool	Bordeaux	Liverpool	Bordeaux	Liverpool	Bordeaux	Liverpool	Bordeaux
Rival(s)	Ipswich, Watford, Manchester United, Aston Villa (champion 1981, European Cup winner 1982)	Nantes (champion 1983), Bordeaux, Monaco (champion 1982), Paris SG	Southampton, Nottingham, Manchester United, QPR	Nantes, Monaco, Auxerre, Paris SG	Everton (champion), Tottenham, Manchester United	Nantes, Monaco, Auxerre, Paris SG (only 13)	Everton, West Ham, Manchester United	Paris SG (champion), Nantes	Everton (champion 1987), Manchester United (only 11 but still best attendance)	Marseille, Toulouse
Investors / revenues beyond TV rights	British record transfer fee = £1.5m in 1981 (Robson, Manchester United) vs £3m for Maradona from Boca Juniors to FC Barcelona in 1982	Bez (Bordeaux)	Tottenham first club on the stock exchange in 1983	Bez (Bordeaux)	Effect of Tottenham on the stock exchange £5m for Maradona from FC Barcelona to Napoli	Bez (Bordeaux)	-	Bez (Bordeaux)	-	Bez (Bordeaux) Tapie (Marseille) Lagardère (Matra Racing) £6m for Gullit from PSV Eindhoven to AC Milan in 1987
Quality of domestic players <sup>3</sup>	Good UEFA ranking with a limited number of foreign players A few players abroad	Semi-finalist in 1982 World Cup Six abroad except in 1981, Platini abroad from 1982 Platini 3 <sup>rd</sup> Ballon d'or 1980, 4 <sup>th</sup> 1981, 9 <sup>th</sup> 1982 Giresse 2 <sup>nd</sup> 1982	Good UEFA ranking with a limited number of foreign players A few players abroad Dalglish 2 <sup>nd</sup> Ballon d'or 1983	Euro 1984 winner (at home) Platini abroad	Good UEFA ranking with a limited number of foreign players A few players abroad Rush 4 <sup>th</sup> Ballon d'or 1984	Qualification for 1986 World Cup after Euro 1984 winner Platini and Six abroad Tigana 2 <sup>nd</sup> Ballon d'or 1984	England 5-8 1986 World Cup A few players abroad but departures to come after the 1986 World Cup	Semi-finalist in 1986 World Cup Platini and Papin abroad	England and Ireland qualified for Euro 1988 Some of the best players abroad	Not qualified for Euro 1988 Platini abroad Amoros 4 <sup>th</sup> Ballon d'or 1986
Quality and quantity of foreign players	Limited number	Different nationalities / continents, not from Asia, North and Central America, no World Cup semi-finalists except Szarmach (Poland)	Limited number	Different nationalities / continents, not from Asia, North and Central America, no Euro semi-finalists	Limited number	Different nationalities / continents, not from Asia, North and Central America Chalana (Portugal) 5 <sup>th</sup> Ballon d'or 1984	Limited number	Different nationalities, / continents, not from Asia, North and Central America Burruchaga (Argentina)	Limited number	Different nationalities / continents, not from Asia, North and Central America Burruchaga, Förster (West Germany)

<sup>1</sup> Authors' estimation. <sup>2</sup> Initially £4.75m refused by clubs. <sup>3</sup> UK and Irish players instead of English players only for England as national TV rights are sold to UK and Irish channels.



Appendix 2. TV rights and characteristics of English and French football first divisions, 1987-2001.

	1987-1988		1988-1992		1992-1997		1997-1999		1999-2001		
	England	France	England	France	England 1992-1996	France	England	France	England 1999-2000	France	
Annual TV rights / domestic competition	£3.15m (€4.5m) BBC & ITV, competition to come	€15.25m TF1 & Canal +	£11m (€16.1m) ITV (vs BBC and satellite TV operator), BSkyB to come	International to come	€15.25m TF1 & Canal +	£50.9m (€64.1m) £42.9m BSkyB (vs ITV) + highlights BBC £8m international	€47.7m <sup>1</sup> Canal +	£211.3m (€310.3m) £186.8m BSkyB (vs competitors) + highlights BBC £24.5m international	€97.2m <sup>1</sup> Canal + (competition to come)	£211.3m (€334m) Competition to come	€267.1m (including €40m for 'Club Europe' <sup>2</sup> ) Canal + & TPS
Timing rights t+1	1988	1987	1992	1992	1996	1997	2000	1999	2000	End of 2002	
Driving force(s)	Liverpool	Bordeaux	Liverpool	Marseille	Manchester United	Paris SG	Manchester United	Marseille	Manchester United	-	
Rival(s)	Manchester United (attendance: 39,152 vs 39,582 for Liverpool and 29,910 for Arsenal)	Monaco (champion 1988), Marseille, Montpellier	Arsenal (champion 1989 and 1991), Leeds (champion 1992), Manchester United	Monaco Paris SG to come	Blackburn 1992-1995 (champion 1995) then Newcastle	Nantes (champion 1995), Auxerre (champion 1996), Monaco (champion 1997)	Arsenal (champion 1998), Chelsea	Bordeaux (champion 1999), Lyon, Monaco, Lens (champion 1998)	Arsenal (London)	Lyon, Monaco (champion 2000), Nantes (champion 2001), Bordeaux, Paris SG, Lille	
Investors / revenues beyond TV rights	-	Bez (Bordeaux) Tapie (Marseille) Lagardère (Matra Racing) Nicollin (Montpellier)	Manchester United 2 <sup>nd</sup> club on the stock exchange in 1991 (worth £18m) £8m for Baggio from Fiorentina to Juventus in 1990	Tapie (Marseille) Canal + (Paris SG)	1 in Europe in 1996-1997	Canal + (Paris SG), Afflelou (Bordeaux), not sufficient to keep their best players	1 in Europe, BSkyB's attempted takeover of Manchester United in 1998-1999 (£623m)	Canal + (Paris SG) Afflelou (Bordeaux) Louis-Dreyfus (Marseille)	1 in Europe	Canal + (Paris SG) Louis-Dreyfus (Marseille) Pathé (Lyon)	
Quality of domestic players <sup>3</sup>	Ireland 5-6, England 7-8 Euro 1988 Some of the best players abroad	Not qualified for Euro 1988 Platini retired, Six abroad	England semi-finalist in 1990 World Cup, Ireland in quarter-finals Scotland 5-6, England 7-8 Euro 1992 A few players abroad Shilton 5 <sup>th</sup> Ballon d'or 1989, Gascoigne 4 <sup>th</sup> 1990	Not qualified in 1990 World Cup, 5-6 Euro 1992 Blanc and Cantona abroad Papin Ballon d'or 1991	England semi-finalist in Euro 1996 (at home) Ince and Gascoigne abroad Shearer 3 <sup>rd</sup> Ballon d'or 1996	Semi-finalist in Euro 1996 A few players abroad before Euro 1996 and Bosman case, much more after	England in round of 16 in 1998 World Cup (all men playing in England Owen 4 <sup>th</sup> Ballon d'or 1998	1998 World Cup winner (at home) with 12/22 players abroad, 2 more 1998-1999	England qualified in Euro 2000 (only McManaman playing abroad) Beckham 2 <sup>nd</sup> Ballon d'or 1999	Euro 2000 winner with 14/22 men playing abroad + 5 leaving France after Euro 2000	
Quality and quantity of foreign players	Limited number	Different nationalities / continents, not Asia, North and Central America Burruchaga, Förster and Allofs (West Germany), Hateley and Hoddle (England)	Limited number (11 in 1991-1992)	Different nationalities / continents, not from Asia, North and Central America, Burruchaga, Waddle	34% of foreign players in 1995-1996 Cantona 3 <sup>rd</sup> Ballon d'or 1993, Schmeichel 5 <sup>th</sup> 1992	18% of foreign players in 1995-1996	37% of foreign players in 1998-1999 Bergkamp 4 <sup>th</sup> Ballon d'or 1997	22% of foreign players in 1998-1999	From 37% to 56% of foreign players from 1998-1999 to 2004-2005 Henry 4 <sup>th</sup> Ballon d'or 2000	From 22% to 36% of foreign players from 1998-1999 to 2004-2005	

<sup>1</sup> Authors' estimation. <sup>2</sup> 'Club Europe': Bordeaux, Lens, Lyon, Marseille, Monaco and Paris. <sup>3</sup> UK and Irish players instead of English players only for England as national TV rights are sold to UK and Irish channels.

Appendix 3. TV rights and characteristics of English and French football first divisions, 2001-2008.

	2001-2002		2002-2004		2004-2005		2005-2007		2007-2008	
	England	France	England 2002-2003	France	England	France	England 2005-2006	France	England	France
Annual TV rights / domestic competition	£522.9m (£841.3m) £463.9m BSkyB (vs and with competitors but insolvency for ITV-Digital) + highlights ITV £59m international	€277.2m (including €40m for 'Club Europe' <sup>1</sup> ) Canal + & TPS	£522.9m (€794m) £463.9m BSkyB (no competition to come) + highlights ITV £59m international	€200m (+ €40m for 'Club Europe' <sup>1</sup> in 2002-2003) Canal + & TPS	£457.6m (€674.5m) £349.6m BSkyB (no competition) + highlights BBC £108m international	€284m Canal + & TPS <sup>2</sup>	£457.6m (€670.4m) £349.6m BSkyB (competition for 2007-2010) + highlights BBC £108m international	€469m Canal + (vs TPS)	£763.6m (€1,116.4m) £555.6m BSkyB & Setanta + highlights BBC £208m international	€487m €478m Canal + (Orange to come) €9m international
Timing rights t+1	2003	End of 2002	2003	End of 2002	2006	End of 2004	2006	Start of 2008	2009	Start of 2008
Driving force(s)	Manchester United	-	Manchester United	Lyon	Chelsea	Lyon	Chelsea	Lyon	Manchester United and Chelsea (Champions League finalists)	Lyon
Rival(s)	Arsenal (champion 2002), Liverpool	Lyon, Lens, Auxerre, Paris SG, Lille	Arsenal (champion 2004)	Monaco, Paris SG	Manchester United, Arsenal, Liverpool (Champions League winner)	- (Lille first half of season)	Manchester United, Liverpool, Arsenal (Champions League finalist)	-	Arsenal and Liverpool	Bordeaux (Nancy 1 <sup>st</sup> half of season)
Investors / revenues beyond TV rights	1 in Europe	Canal + (Paris SG) Pathé (Lyon)	1 in Europe, Abramovitch (Chelsea, 2003)	Canal + (Paris SG) Pathé (Lyon)	1 in Europe, Glazer (Manchester United)	-	1 in Europe, Lerner (Aston Villa)	Colony Capital (Paris SG) Lyon first French club on the stock exchange (2007)	1 in Europe, Thaksin (Manchester City), Gillett et Hicks (Liverpool)	Colony Capital (Paris SG)
Quality of domestic players <sup>3</sup>	England in quarter-finals in 2002 World Cup (only Hargreaves playing abroad) Owen Ballon d'or 2001, Beckham 4 <sup>th</sup>	Eliminated in first round in 2002 World Cup with 18/23 players abroad	England in quarter-finals in Euro 2004 (Hargreaves and Beckham playing abroad)	Quarter-finals in Euro 2004 with 15/23 players abroad	England qualified for 2006 World Cup (Hargreaves, Beckham and Owen abroad)	Qualified for 2006 World Cup (12/23 of the future players for World Cup abroad)	England in quarter-finals in 2006 World Cup (Hargreaves and Beckham abroad) Lampard 2 <sup>nd</sup> and Gerrard 3 <sup>rd</sup> Ballon d'or 2005	2006 World Cup finalist (12/23 players abroad)	No UK teams / Ireland in Euro 2008 but 10 English first-team players in the Champions League final	Eliminated in first round in Euro 2008 (13/23 players abroad)
Quality and quantity of foreign players	From 37% to 56% of foreign players from 1998-1999 to 2004-2005, Asia	From 22% to 36% of foreign players from 1998-1999 to 2004-2005 Ronaldinho	From 37% to 56% of foreign players from 1998-1999 to 2004-2005 Henry 2 <sup>nd</sup> Ballon d'or 2003	From 22% to 36% of foreign players from 1998-1999 to 2004-2005	56% of foreign players Henry 4 <sup>th</sup> Ballon d'or	36% of foreign players	55% of foreign players in 2005-2006 Henry 4 <sup>th</sup> Ballon d'or 2005, 3 <sup>rd</sup> 2006	36% of foreign players in 2005-2006	60% of foreign players Cristiano Ronaldo 2 <sup>nd</sup> Ballon d'or, Drogba 4 <sup>th</sup>	33% of foreign players

<sup>1</sup> 'Club Europe': Bordeaux, Lens, Lyon, Marseille, Monaco and Paris. <sup>2</sup> Canal + won exclusive TV rights in November 2002 for the 2004-2007 period but this was cancelled by the French Competition Council in January 2003. <sup>3</sup> UK and Irish players instead of English players only for England as national TV rights are sold to UK and Irish channels.

Appendix 4. TV rights and characteristics of English and French football first divisions, 2008-2020.

	2008-2010		2010-2012		2012-2013		2013-2016		2016-2020 (2019 for England)	
	England	France	England	France 2010-2011	England	France	England 2013-2015	France 2013-2014	England 2016-2018	France 2016-2018
Annual TV rights / domestic competition	£763.6m (€909.5m) £555.6m BSkyB & Setanta then ESPN + highlights BBC £208m international	€501m €494m Canal + & Orange €7m international	£1,028.4m (€1,192.1m) £549.4m BSkyB & ESPN + highlights BBC £479m international	€511m €17m international Orange to stop, decrease in number of subscribers for Canal +, Al Jazeera to come	£1,028m (€1,268m)	€500m €468.5m Canal + & BeIN Sports €31.5m international	£1,642.2m (€2,078.7m) £899.2m Sky & BT + highlights BBC £743m international	€500m €468.5m Canal + & BeIN Sports €31.5m international	£2,513.7m (€2,972.8m) £1,446.7m Sky & BT + highlights BBC £1,067m international	€616.5m 16-18, €665€ 18-20 €585m Canal + & BeIN Sports €31.5m to €80m international
Timing rights t+1	Start of 2009	2011	2012	2011	Start of 2015	2014	Start of 2015	2014	Start of 2018	2018
Driving force(s)	Manchester United	Lyon	Manchester United	Marseille	Manchester United	Paris SG	Chelsea	Paris SG	Manchester City and Manchester United	Paris SG
Rival(s)	Liverpool, Chelsea	Bordeaux (champion 2009), Marseille (champion 2010)	Manchester City (champion 2012), Chelsea (Champions League winner 2012)	Lille (champion 2011), Lyon, Paris SG	Manchester City, Chelsea	Marseille, Lyon	Manchester City, Arsenal, Manchester United	Monaco	Chelsea, Tottenham, Liverpool Arsenal	Monaco, Lyon, Marseille
Investors / revenues beyond TV rights	1 in Europe, Sheikh Mansour (Manchester City, 2008)	Colony Capital (Paris SG)	1 in Europe, Henry (Liverpool, 2010)	Qatar Investment Authority (Paris SG)	1 in Europe	Qatar Investment Authority (Paris SG)	1 in Europe	Qatar Investment Authority (Paris SG) Rybolovlev (Monaco)	1 in Europe	Qatar Investment Authority (Paris SG)
Quality of domestic players <sup>2</sup>	England in round of 16 in 2010 World Cup (all 23 players in England)	Eliminated in first round in 2010 World Cup (12/23 players abroad)	England in quarter-finals in Euro 2012 (all 23 players in England) Rooney 5 <sup>th</sup> Ballon d'or 2011	Quarter-finals in Euro 2012 (11/23 players abroad)	England qualified for 2014 World Cup (only 1 of future players abroad, Forster)	Qualified for 2014 World Cup (15/23 of the future players abroad)	England eliminated in first round in 2014 World Cup (only 1 player abroad, Forster) but winning all its games in Euro 2016 qualifiers Bale (Wales) abroad	Quarter-finals in 2014 World Cup (15/23 players abroad)	England in round of 16 in Euro 2016 (all 23 players in England) Bale (Wales) abroad	Final in Euro 2016 (18/23 players abroad)
Quality and quantity of foreign players	From 60 to 68% of foreign players from 2007-2008 to 2013-2014 Cristiano Ronaldo Ballon d'or 2008, 2 <sup>nd</sup> 2009 but leaving Torres 3 <sup>rd</sup>	37% of foreign players in 2009-2010	From 60 to 68% of foreign players from 2007-2008 to 2013-2014	From 37 to 41% of foreign players from 2009-2010 to 2013-2014 Hazard	From 60 to 68% of foreign players from 2007-2008 to 2013-2014	From 37 to 41% of foreign players from 2009-2010 to 2013-2014 Paris SG effect	68% of foreign players in 2013-2014	41% of foreign players (40% in 2014-2015) Ibrahimovic 4 <sup>th</sup> Ballon d'or 2013, Falcao, James Rodriguez	Around 70% of foreign players	Around 40% of foreign players Neymar 5 <sup>th</sup> Ballon d'or 2016, 3 <sup>rd</sup> 2017

<sup>1</sup> Authors' estimation. <sup>2</sup> UK and Irish players instead of English players only for England as national TV rights are sold to UK and Irish channels.