



WORLD CURLING FEDERATION

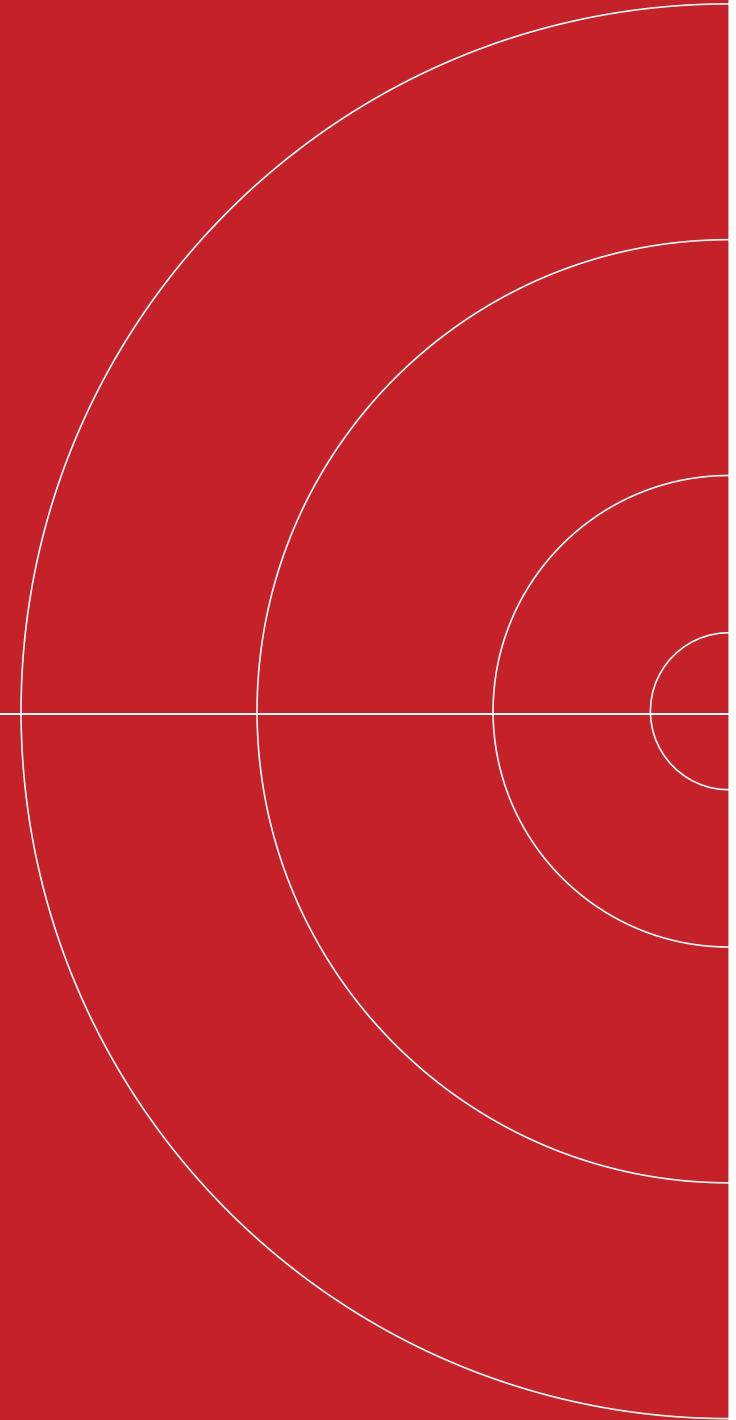
**ATHLETE WEBINAR
28 MARCH 2023**





MTV Update

**MAXIMISING THE
VALUE**



MTV Objectives

1. Original scope was to study the 8 v 10 question.
2. To identify the most important factors in maximizing the value of curling as a sports entertainment property
3. To analyze, consider and recommend potential enhancements
4. To determine the likely impacts of decisions
5. To provide the WCF and its Member Associations with the best information to make well-informed decisions in order to maximize the value of curling as a sports entertainment property

Goal: Create Maximum Entertainment Value



MTV Stakeholder Engagement

1. Broadcasters - 2020 & 2023
2. Fan Survey - 2021 (during WWCC and WMCC)
3. Neilson Media Research Report - 2020
4. Athlete Surveys - 2016, 2019 and 2022
5. CurllIT Report on World Championships played under 5-Rock FGZ but before NTZ - 2021 and updated 2023 (*more than 600 games and 5500 ends*)
6. Financial Impact Analysis - 2022 and updated 2023
7. Consultation and Analysis of Trial Rules - 2021, 2022 and 2023

Goal: Create Maximum Entertainment Value



Competition Subjects

- Ensure compelling competition
- Maintain competitive integrity
- Determine Ideal Length of Game, Competition and Season

Maximising Business Opportunities

- Increase Broadcaster Interest and Media Rights Revenue
- Increase Sponsor Interest and Marketing Revenue
- Increase TV and Digital Audience Interest
- Increase Spectator Interest



Athlete Engagement

- Ensure athlete opinion was included in the MTV process – Athlete Surveys
- Determine most important factors impacting athlete well-being

Stakeholder Engagement and Research

- Broadcaster consultation
- Fan Survey
- Data analysis – both game and media
- Business impact analysis
- Feedback on trial rules

MTV Identified Challenges

1. Inconsistent game duration
2. Inconsistent length of ends (pace of play)
3. Deciding tied games
4. Keeping fan engagement throughout the game
5. Reduce outcome predictability
6. Ensure comeback potential

Goal: Create Maximum Entertainment Value



Why is this important ...

- Audiences want brisk and exciting competition
- Attract new and younger audiences
- Audiences switch off if there is little chance of a comeback
- Audiences switch off if the outcome of a game appears too predictable

Curling is in competition with every other sport for fan, audience, media, broadcast and marketing attention.

These conditions exist regardless of the length of a curling game in ends.



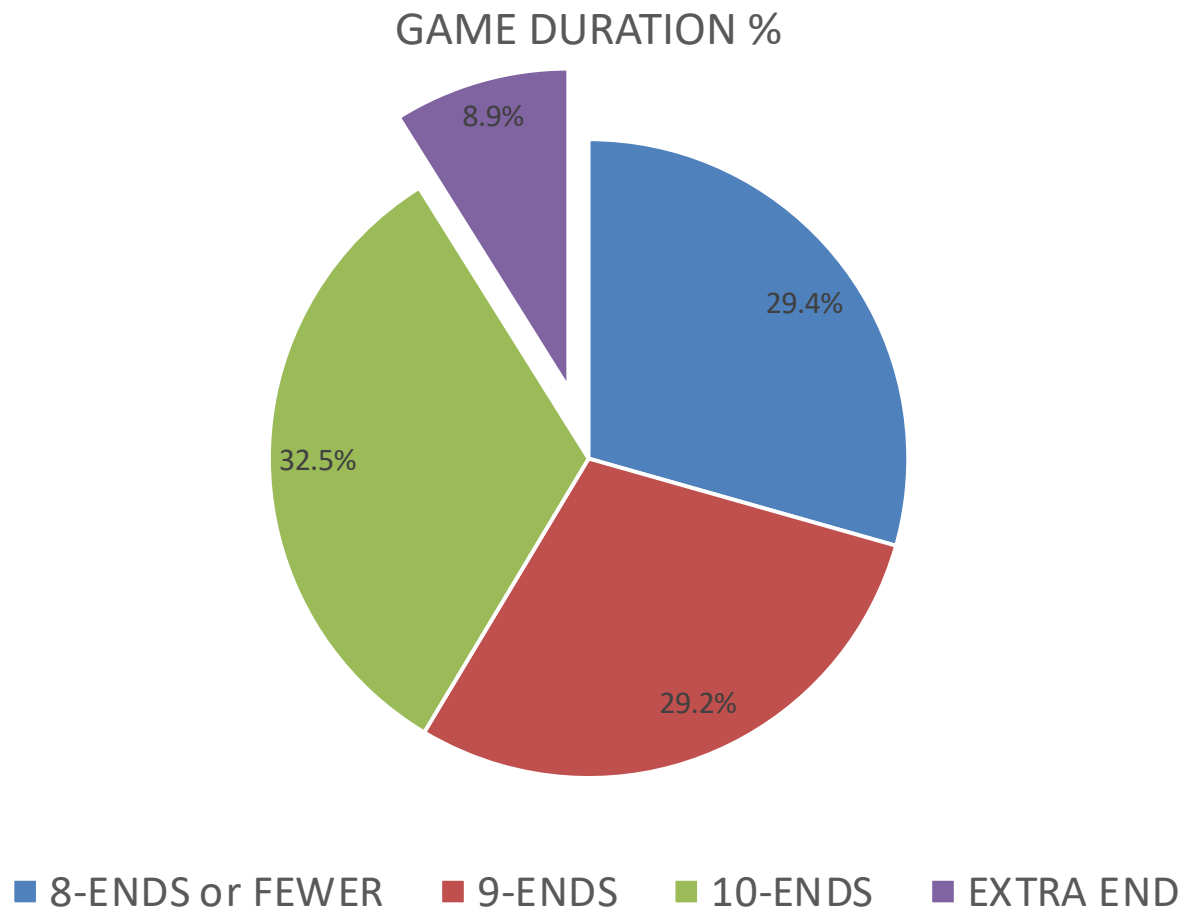
For Example

Data from WWCC and WMCC since the adoption of the 5 rock Free Guard Zone, through the 2021 season (before NTZ)

Win Predictability - Since 5-Rock FGZ thru 2021		
	WWCC	WMCC
Start Game with Last Stone	58.3%	64.6%
Score First	61.9%	66.2%
Score 2 First	68.9%	82.6%
Score 3+ First	86.0%	96.4%
Tied after 8th End with Last Stone	62.1%	67.9%
1 point up after 8th End with Last Stone	84.6%	90.9%
Tied Extra End with Last Stone	61.9%	85.2%

For Example

Data from WWCC and WMCC since the adoption of the 5 rock Free Guard Zone, through the 2020 season



For Example

- Broadcasters allocate time in 30-minute increments
- Ideally, a game fills the broadcast window, without going over
- A game that goes over the broadcast window results in:
 - Delay in the start of the next program
 - Leaving the game before its conclusion
- This challenge exists equally for 8 or 10 end games with extra ends

	0-30 Min	31-60 Min	61-90 Min	91-120 Min	121-150 Min	151-180 Min	181-210 Min
6-7 Ends	Red	Red	Red	Red	Grey	Grey	Grey
8 Ends	Yellow	Yellow	Yellow	Yellow	Yellow	Grey	Grey
9 Ends	Green	Green	Green	Green	Green	Green	Grey
10 Ends	Green	Green	Green	Green	Green	Green	Grey
Extra End	Red	Red	Red	Red	Red	Red	Red



Things that most negatively impacting Athlete well-being

- 1. Lack of Financial Security**
- 2. Time away from family and friends**
- 3. Length of Season**
4. Number of Competitions Played
5. Training
6. Rule Changes
- 7. Length of Game**
8. Pressure to Perform
9. Format of the Competitions
10. Social Media Comments

What Curling Fans want

1. OFFENSE!!
2. Compelling competition
3. Brisk and exciting pace of play
 4. Fewer blank ends
 5. More curling



What other sports do to manage length of game

Length of Game/Pace of Play Management

1. Basketball – Shot Clock
2. Football – Play Clock
3. Tennis – Service Clock
4. MLB Baseball – Pitch Clock

Tie-breaking

1. Basketball - Abbreviated Overtime
2. NFL Football – Sudden death over time w/time limit
3. Tennis – Tie-breakers (even in Majors)
4. Golf – Sudden death playoff holes
5. MLB – Runner starts at 2nd base in extra innings

Goal: Create Maximum Entertainment Value

MTV Next Steps

1. Trial ways of better controlling the length of the game while ensuring competitive integrity
2. Leverage technology and data to build a better experience
3. Create commercial opportunities that create win-win-win situations
4. Conduct Athlete Focus Groups - Professionally coordinated by the WCF Athlete Commission

Still with the Goal: Create Maximum Entertainment Value





Motion – 2022 Annual General Assembly

The WCF Board brings forward concrete proposals on both the number of ends in a championship curling game and the format of World Championships well in advance of the 2023 Annual General Assembly and no later than June 30, 2023



8 v 10 – Where are we?



8 v 10 Considerations

1. Athlete views and wellbeing
2. Broadcaster feedback
3. Financial Implications

Still with the Goal: Create Maximum Entertainment Value



Athlete Feedback

1. No clear majority in favour of 8 or 10
2. 10 ends mean the best team wins more often
3. 8 ends is more exciting
4. Length of the season has more impact on player welfare than the length a game

Next steps

1. Player focus groups to look into what is meant by more exciting and feedback on other rules and format issues



Broadcaster Feedback

1. 8 end format will not on it's own result in broadcasters showing more games
2. Consistency in length of broadcast and compelling competition is the key to increasing coverage
3. Consistent pace of play maintained throughout the game allows better control of overall game time and keeps audiences engaged

To replace lost broadcast time we would need to increase the audiences by around 20% - would reducing from 10 to 8 ends do this?



Financial Feedback

1. WCF events in Canada face 20% reduction in marketing revenue if we go to 8 ends
2. WCF events outside of Canada face between 4% and 17% reduction in marketing revenue
3. Key broadcast right fees contracts could be reduced by reduced by 16%

Approximate impact is US\$200,000 per annum – or to put it another way the cost of flights to the World Juniors (currently paid by WCF) or Development Assistance Program funding for MAs dropping to about \$7000 from \$12,000

Current thoughts

After reviewing the existing data, the WCF Board is not yet convinced there is compelling evidence to reduce to 8 ends for Championship play at this time, in fact it would seem to cause more harm than good.

However, we acknowledge there is stakeholder opinion that indicates a preference for 8 ends.

The WCF will continue to look for ways to mitigate these impacts and to find new revenue opportunities and we invite stakeholders to identify any evidence you feel has not been considered.

Please let us know – the decision is not final yet



WOMEN'S AND MEN'S

WORLD CHAMPIONSHIP STRUCTURE OPTIONS



- **Members want the WCF to investigate expanding the World Championships to add additional teams from the ECC and PCCC**
- **One of the MA suggested formats would be a 16 Team WCC.**
- **The C&R met in Calgary, November 2022 immediately following the PCCC to investigate all options including the 10 + 10 format outlined at Congress**
- **This presentation is a summary of that review and recommendation**

PRINCIPLES



- Worlds Best Teams
- Consistent with IOC Values
- Regional Representation
- Good Show
- Maximize marketing opportunities
- Desired event to host
- Completed within a 9 day window
- Good and fair competition
- Positive Financial impact
- Maintain importance of ECC and PCCC



CURRENT – 13 TEAMS

**13 Team RR populated by
teams from the PCCC and
ECC**



Teams:

- **5 Pan-Continental Championships**
- **7 European Championships**
- **13th spot allocated to PCCC or ECC based on 5 team aggregate performance in WCC (2023 – 5 PCCC teams and 8 ECC teams)**

Playoff System:

- **Single Round Robin**
- **6 Teams qualify, 1&2 advance to semi-finals and play the winners of 3-6 and 4-5 in the quarterfinals**



Advantages:

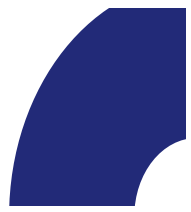
- **Single Round Robin – play all teams – Athlete preference**
- **13th spot determined by performance – competitive balance**
- **Simple and clear to determine Olympic points**
- **Provides opportunities to teams new to the WCC to develop additional skills and confidence**
- **Proven financial model – positive impact on WCF & CC**

Challenges:

- **Long tournament, Athlete fatigue?**



OPTION 2 – 16 TEAMS – 2 POOLS



Expand WCC from 13 to 16 teams by adding additional entries from the ECC and PCCC

Organize teams into 2 8-team pools



Playoff System:

- **Two pools of 8 with a RR of 7 games**
- **Top 8 (4 from each pool) continue the RR against the teams advancing from other pool**
- **6 Teams qualify for the finals, 1&2 advance to semi-finals and play the winners of 3-6 and 4-5 in the quarterfinals**



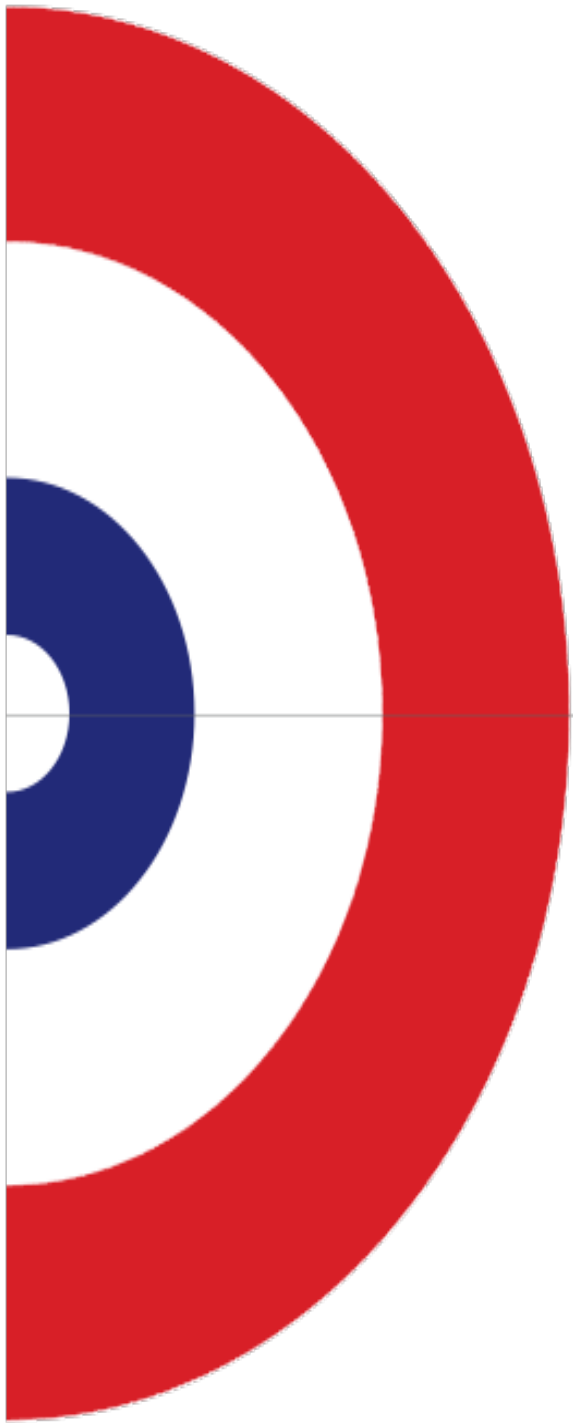
Advantages:

- **Additional 3 teams compete at the WCC**
- **Offers more marketing/revenue opportunities (3 more MAs)**



Challenges:

- **Broadcasters not assured specific game times and dates beyond the first RR draw – potential reduction in media/marketing rights up to US\$500K**
 - All broadcasters only guaranteed 7 games of their national team
 - Participation in cross-over games unknown until after initial RR
- **Potentially more costly for Host/LOC if it continues to pay for hotel cost**
- **Potentially more one-sided scores (1v16, 2v15, etc.)**
- **Two separate Round-robins – do not play all teams**
- **Pool seeding may be an issue – possible uneven pools, can't publish draw until all teams are named so can't sell ticket or games to broadcasters**
- **Possible need to renegotiate existing host and broadcast contracts**
- **CC experience with this format could result in decreased ticket sales of approx. \$75k (greater if the home team is eliminated in the first RR)**



OPTION 3 – 10 + 10 TEAMS



Two tiers of 10-teams that are separate, but run at the same venue/time (basically the Olympic RR draw). Teams ranked 1-10 in Tier 1 and 11-20 in Tier 2.

The 5 top teams of the first tier advances to the playoffs (5/10)

The winner of second tier advances to playoffs (1/10)



Teams for each tier:

- **Populated based on results from ECC and PCCC**

Playoff System:

- **1st and 2nd Tier separate round-robins**
- **5 Teams from 1st Tier qualify for the finals**

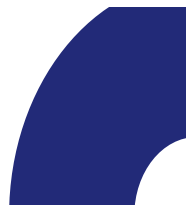
A 10 team RR would normally have a 4 team playoff, this format allows for an extra 1st Tier team to advance

- **1 Team from 2nd Tier qualify for finals (6th place in the playoff draw)**



Advantages:

- **20 MAs involved in the World Championship**
- **More competitive contests in each round robin (1v10, 11v20 worst case)**
- **Offers more marketing/revenue opportunities (7 more MAs)**
- **Potentially all 20 MAs get Olympic Points *****
- **Safety valve for top ranked team(s) not making the 1st Tier pool**
- **Potential Cinderella situation**



Challenges:

- **Larger event to organize**
- **How many MAs have the capacity to host a 20 team event**
- **Unknown financial model – potential loss of revenue to Host & WCF**
- **Potentially more costly for Host/LOC if it continues to pay for hotel cost**
- **Playing conditions with 4 draw days(requires 2, 4 draw days)**
- **Except for larger MAs, volunteer costs may be higher if they need to import additional personnel**
- **Based on CC experience, this format could result in decreased walk-up ticket sales of approx. \$45k (in-Canada event)**

CURRENT PROPOSAL

- 1. Continue with existing 13 team format until after 2026 Winter OG**
- 2. The 10 + 10 format is preferred over the 16-team pool format as it will add more MAs to the WCC (7 vs 3), ensure more attractive broadcast environment and have less negative financial impact.**
- 3. Complete additional investigation into eliminating or minimizing the negative impacts of the 10 + 10 format including:**

Improve and refine the financial model with additional sponsorship, increased broadcast distribution and reduced costs

Ensure no new contracts are signed that would restrict format changes

Ensure solution to issues with pool seeding

Develop pace of play and fan engagement enhancements

Overall improvement of Host experience to encourage additional larger venues

Target to present a new WCC format with additional participating teams for Congress 2024. The new format would be implemented in the next quad.

SUPPORTED BY THE WCF EXECUTIVE BOARD – Final decision by 30 June

2023



WORLD CURLING FEDERATION

Big Ideas



Ideation Seminar

Toronto, January 2023





Concept

Bring together the Board and a variety of stakeholders to discuss pressing issues within the sport and look at how we can continue to ensure Curling grows and develops

Results

The discussions were distilled into six BIG IDEAS that the Board will take forward and invest in to help deliver the aims of the Forward Plan

Attendees

- WCF Board and Senior Staff
- Marketing Partners

Martin Lindemann, Infront
Kathy Henderson, Curling Canada

- Broadcast Partners

Scott Higgins, TSN

- Event Management

Jennifer Kjell and Kristi Petruschak, Rogers SportsNet (owners of the Slams)

JP Hong (Past Olympic Sport Manager)

- Organisational Sustainability

Michael Marklund

- Athletes

Jill Officer, Tyler George, Agnes Knochenhauer, Matt Dunstone, Ray Hussain

- Commercial Partners

Chad McMullen

Speakers – Day One

- Andrew Ryan, Association of Summer Olympic International Federations
What does a Modern IF look like?
- Chris Solley, World Academy of Sport
Sustainable Venue Solutions
- Mike Laffin, Global Sustainable Sport
Introduction to sustainability
- Dr Richard Norman, Academic
The impact of DEI on Sport



Speakers – Day Two

- Jackie Nisbet and Andrew Moss, International Tennis Federation
Event Calendar, Ranking and Licensing
- John Easterbrook and Jeff Price PGA of America
How to attract new audiences and change the image of a sport
- Uli Lacher, Media Consultant
Maximising Sponsorship Income
- Yiannis Excharcos, CEO, Olympic Broadcast Services
Future Trends in Broadcasting
- Joe Gesue, SVP, Olympic Programming, NBC
Changes in Media Consumption

The conversation

- What do we want the WCF to stand for?
- Are we prepared to make investment to build the future?
- How do we get more facilities?
- How do we support our athletes?
- How do we better engage athletes, members, fans - everyone?
- What data do we have, what data do we need and how do we use it?
- How do people watch our sport?

What does a modern WCF look like?

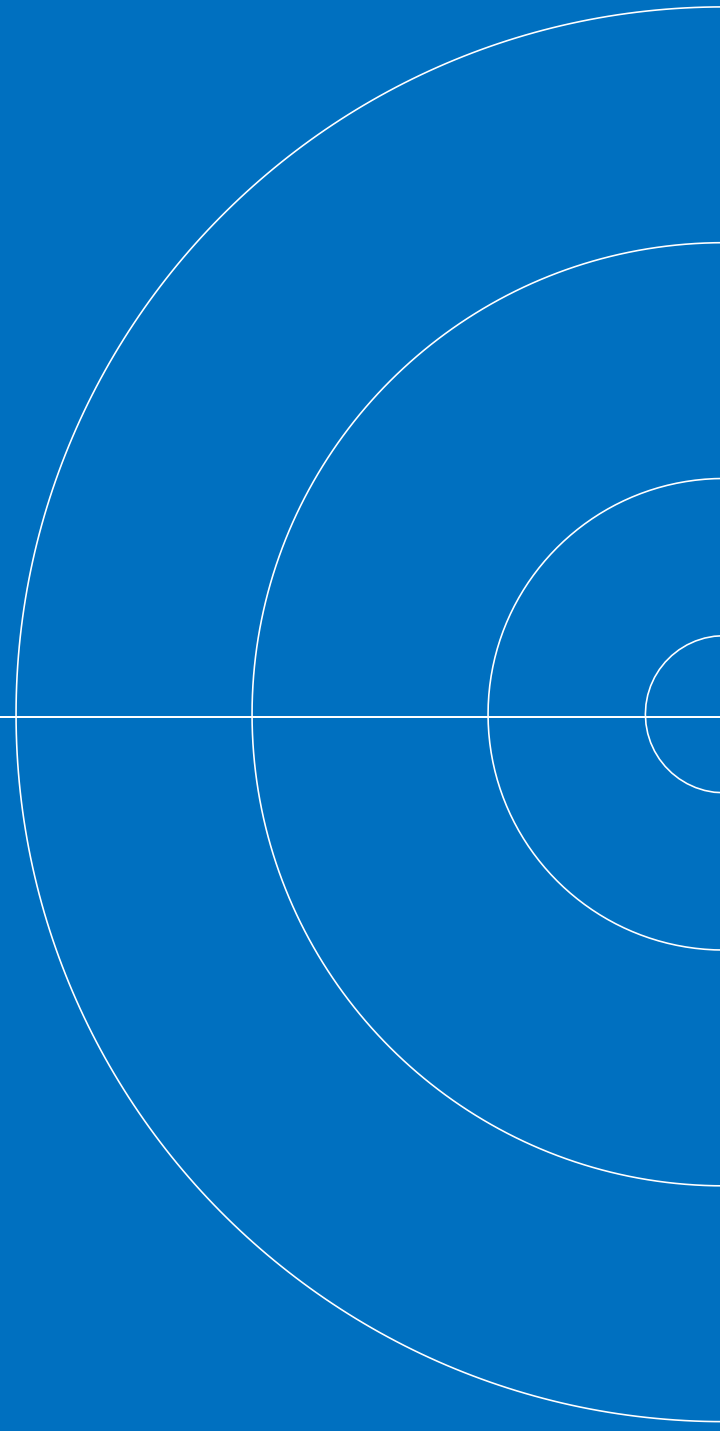
Big Ideas

- 1. Brand Refresh - All**
- 2. Athletes, Events and Calendar – Jill/Rob**
- 3. Facilities – Sergio/Toyo/Kim**
- 4. Commercial Development – Hugh/Rob**
- 5. Stakeholder Engagement – Graham/Helena/Kim**
- 6. Big Data – Helena/Hugh**



Big Ideas

Athletes, Events and Calendar



Athletes Events and Calendar

Primary goal:

To develop a coherent calendar of events for our athletes, to provide education and support for the athletes and to extend and strengthen the role of the Athlete Commission

Next Steps:

- Employ a full time Athlete Support Officer to work with the Athlete Commission
- Create an Athlete Licensing System that ensures all athletes competing at the elite level are given the educational support they need to meet the responsibilities of competing at the elite level
- Review calendar and ranking systems in other sports, in particular the system used by the International Tennis Federation, and assess how a similar system could be adopted in Curling
- Create an Event Licensing System that ensures athletes and events have a clear understanding of what the expectations are of events at different levels

This is a long term project with a complete calendar revamp to be ready for the season following the next Olympic Winter Games

