



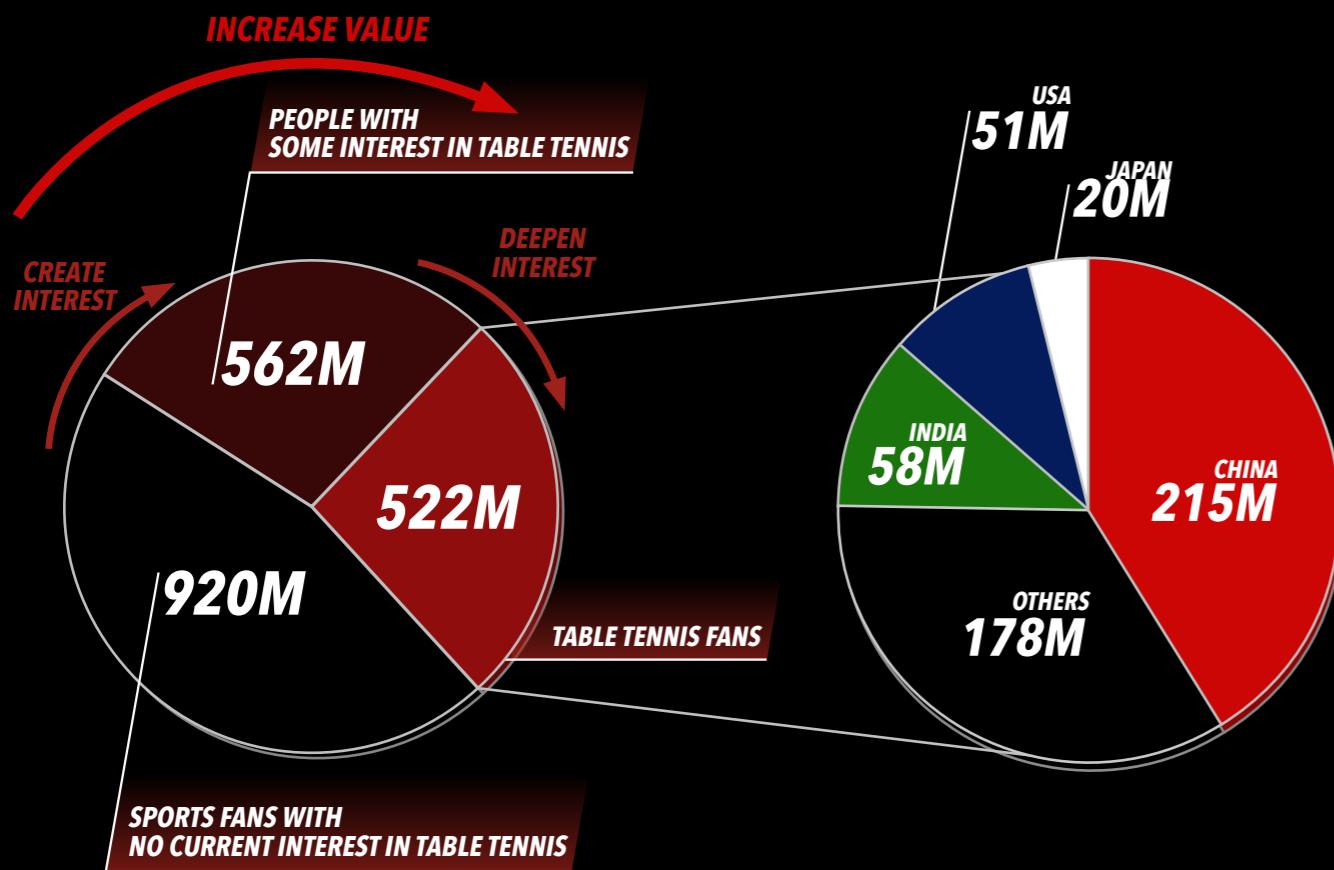
# **ITTF** **2021 COMMERCIAL** **RIGHTS TENDER** **PRELIMINARY INFORMATION**



**TABLE TENNIS.  
FOR ALL.  
FOR LIFE.**

## SIZE OF THE POTENTIAL MARKET\*

\*All figures shown based on 28 key countries, whose population consists of c.65% of the world's population



## GLOBAL REACH

OVER 400 HOURS  
of dedicated TV broadcast



@ 2.8 MILLION  
social media followers

500 MILLION  
unique viewers



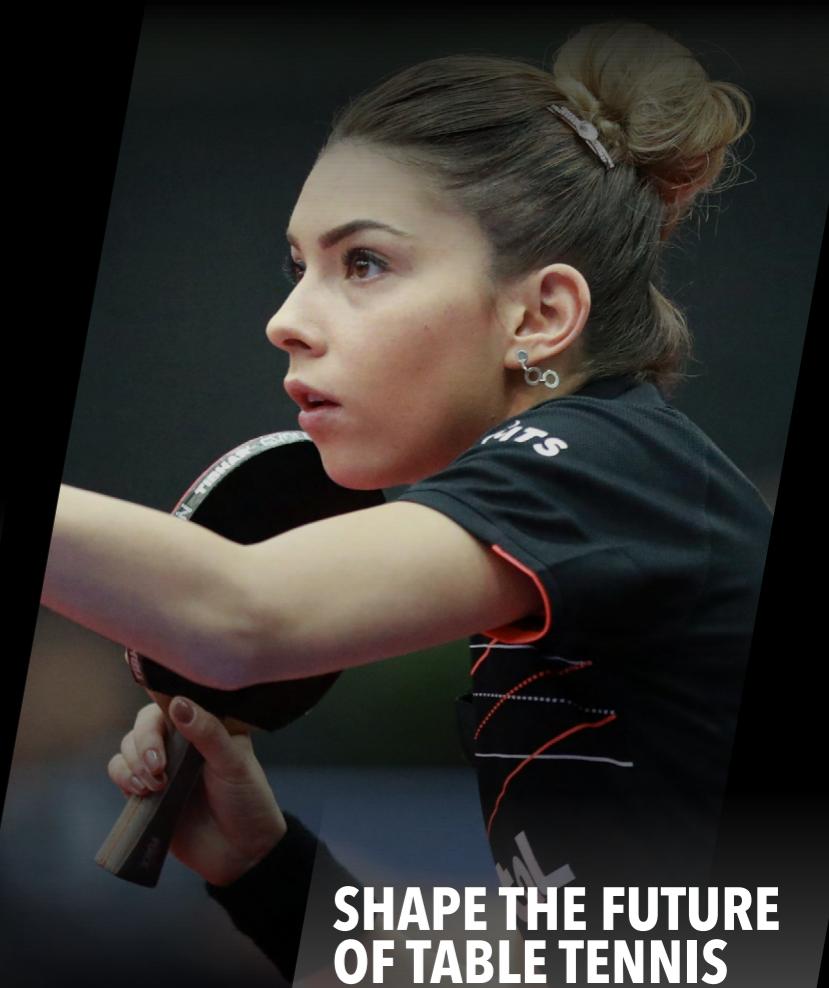
OVER 1,600 HOURS  
of social media content generated



## TABLE TENNIS. FOR ALL. FOR LIFE.

300 million players  
across every country on the planet.

Firmly established in Asia with many European strongholds. Attractive growth markets ready for development with the Strategic Partner. Innovative new formats and expanded international competitions.



## SHAPE THE FUTURE OF TABLE TENNIS

A unique opportunity to enter into a long-term, flexible partnership with a highly innovative governing body, unlocking its huge commercial potential for mutual gain.

## COMPELLING STORIES FOR GLOBAL MARKETS

Showcasing our stars through participation in a compelling structure of successful and meaningful international events. The development of new local heroes to access attractive growth markets.



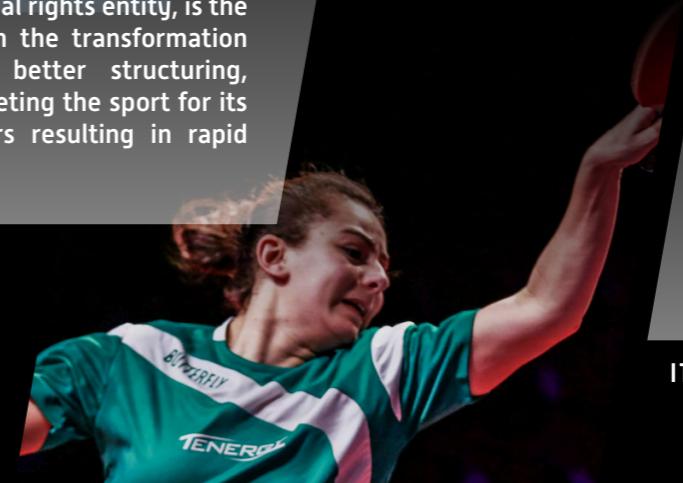
## ENHANCED PROFESSIONALISM ACCELERATING COMMERCIAL GROWTH

The creation of World Table Tennis, a dedicated commercial rights entity, is the critical next step in the transformation of the sport by better structuring, operating and marketing the sport for its commercial partners resulting in rapid revenue growth.



## TRANSPARENT AND FLEXIBLE TENDER PROCESS

A tender process designed to assist bidders to develop and agree on a business model for the long-term benefit of all World Table Tennis stakeholders.





**COME ON THIS  
JOURNEY  
WITH US**

# FOREWORD

## STEVE DAITON

On behalf of the International Table Tennis Federation (ITTF), the world governing body for Table Tennis, I would like to introduce you to our tender process to find a Strategic Partner. The ITTF is seeking a long-term partner to assist in delivering a revenue step change for the sport by re-modelling the way our commercial rights are managed from 2021.

In May 2018, the ITTF launched its first Strategic Plan which is already guiding the future direction of Table Tennis and the development of our sport around the world. Our strategic priorities include:

- Creating a compelling structure of international events;
- Improving the promotion of the sport;
- Increasing commercial revenue generated.

This opportunity provides our chosen partner with the chance to help the ITTF achieve all three of these priorities for mutual benefit.

Over the last two years, under our new leadership, we have already made great progress in reshaping these international events to unlock their commercial potential. Working closely with leading sport business advisors from Deloitte, we have made bold decisions on competition structures in order to expand our global footprint for the benefit of the sport. This pace of change will accelerate further leading up to the new commercial era beginning in 2021.

We are seeking a long-term Strategic Partner to help us shape this transformation, by being a founding partner in our new commercial entity, World Table Tennis (WTT). It is proposed that WTT will hold all of the ITTF's core commercial assets. While the ITTF is headquartered in Switzerland, it is proposed that WTT will be operated from Singapore, providing easy access to the Asian market.

The Commercial Rights Tender will be issued in March and will set out the significant flexibility available to prospective partners with regards to the commercial models that will be considered, the properties included and ultimately the way they are sold. Innovative models and proposals will be welcomed.

Table Tennis is truly a global game, played competitively by over 300m casual and competitive players. Over 500m people combined watched the 2017 & 2018 World Table Tennis Championships across 140 countries. The ITTF has member National Associations in every single country globally. Our chosen partner will be presented with an exciting opportunity to help shape the future of Table Tennis.

I would like to thank you for your interest in the ITTF Commercial Rights Tender and I look forward to exploring how we can best work together in the coming months.

**STEVE DAITON**  
ITTF CEO



A wide-angle photograph of a large indoor stadium filled with spectators. In the foreground, a male table tennis player in a red Li-Ning shirt is captured in mid-swing, looking upwards. In the background, a red table tennis table is positioned on a stage, with several players and officials visible. The stadium's ceiling features a complex grid structure and numerous small lights.

# OVERVIEW

The ITTF has an ambitious vision to deliver a revenue step change for the sport by re-modelling the way its commercial rights are monetised from 2021 onwards, and is seeking a long-term Strategic Partner to help achieve this vision.

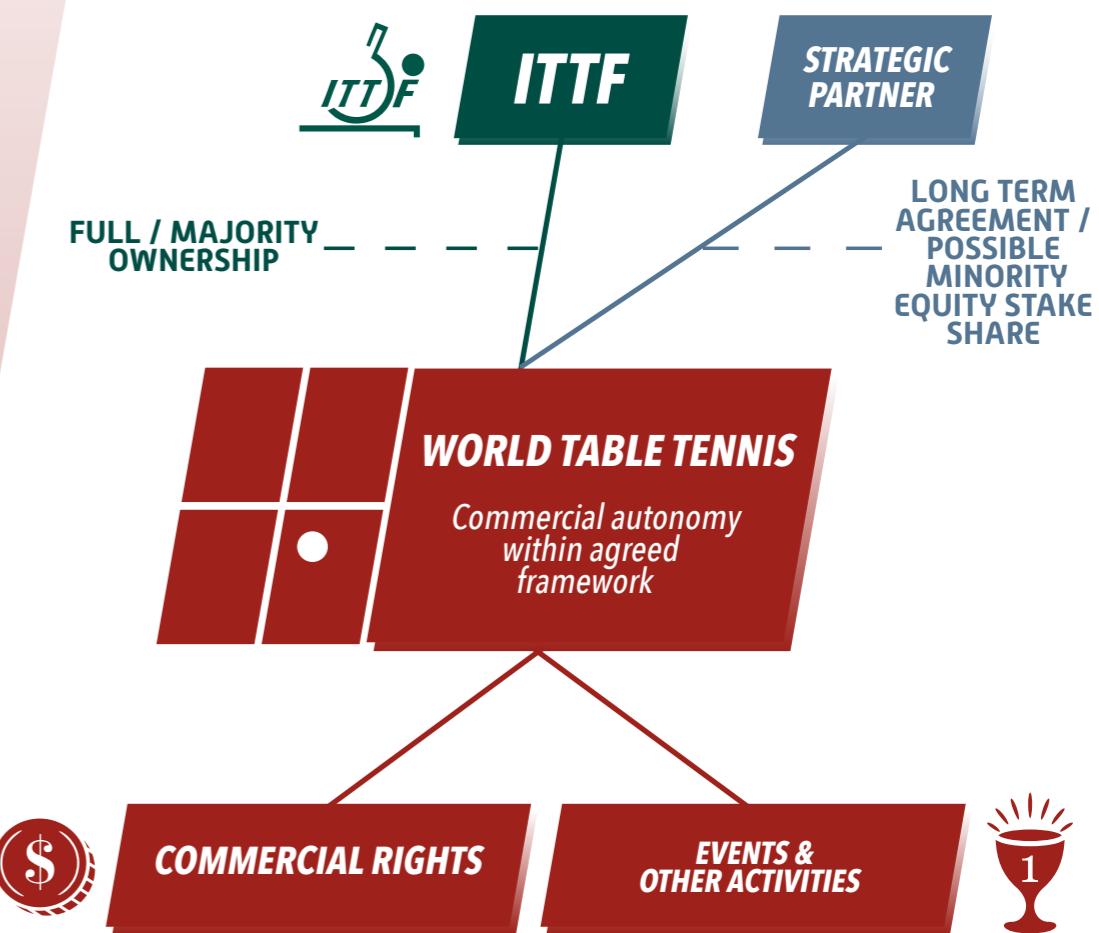
The new partner will be key in driving revenue increases and further building the professionalism in Table Tennis. Our Strategic Plan has already set out an expectation of at least doubling current commercial revenue by 2024, but with the right Strategic Partner, we are confident this target can greatly exceeded and growth accelerated.

Significant steps have already been made in this respect, with the tendering of all commercial rights an important next step.

# WORLD TABLE TENNIS



The ITTF will create World Table Tennis (WTT), a new dedicated entity that will provide the platform for significant commercial development, and that will be separated from the governance responsibilities of the ITTF. WTT will hold all commercial rights from 2021 and will benefit from the experience and expertise of ITTF's commercial team. The Strategic Partner will work directly with WTT.



# COMMERCIAL POTENTIAL OF TABLE TENNIS

Table Tennis has many favourable commercial factors, but these are not currently fully leveraged.

The direct commercial revenue generated by the ITTF in 2018 does not therefore reflect the true commercial value.

**Strong presence in high growth Asian countries**  
- forecast annual sports market growth of 8% over the next five years

**21% of the global population**  
are interested in table tennis

**2.8 million fans**  
connected to the ITTF via social media

**All countries represented at the ITTF**  
- provide platform for commercial growth in target markets

**Strong sense of gender equality and equal pay**

**Played by over 300 million people worldwide**



**One of highest watched Olympic Sports**  
[since 1988] - with a goal of migrating more occasional viewers to ITTF events



**One of the most popular sports for persons with disabilities**

**77% of fans are under the age of 50**



# THE OPPORTUNITY



From 2021 all commercial rights to all major international ITTF properties will be available and the ITTF want to re-model the way in which these rights are monetised.

The ITTF is flexible on how the commercial terms are structured in a long-term agreement between WTT and the Strategic Partner, including consideration of a possible minority equity stake in WTT.

The ITTF are making all significant commercial rights available as part of this tender, and are open to suggestions on how these rights are best packaged, marketed and sold/operated. Innovative approaches from bidders are encouraged.

## FEATURES OF A SUCCESSFUL RELATIONSHIP BETWEEN ITTF AND THE STRATEGIC PARTNER

### ITTF

- Extensive commercial rights will be put in a separate commercial vehicle World Table Tennis
- Strong, long-term partnership that will welcome significant input from the Strategic Partner
- A highly flexible approach

- Ability and experience in growing sports properties
- Strong presence in key markets
- Experience of working with International sporting properties
- Passion and commitment to the growth and professionalization of the sport

### STRATEGIC PARTNER

## THE COMMERCIAL RIGHTS AVAILABLE



### SPONSORSHIP RIGHTS

- Global exposure
- Provides access to attractive Asian markets
- Opportunity and flexibility for non-traditional innovative sponsorships across all mediums



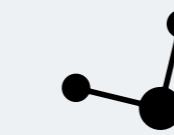
### MEDIA RIGHTS

- 400 hours of TV content produced yearly
- TV distribution in 146 countries
- Demographic suited to new OTT revolution
- Major opportunity for new TV innovations to increase value



### DIGITAL, SOCIAL AND TV ADVERTISING INVENTORY

- 2.8m fans through ITTF social media platforms
- Proven appetite for streamed content
- OTT platform, iTV, already proven
- ITTF website generated over 13m hits during 2018



### GAMING AND DATA RIGHTS

- 10,000+ yearly professional matches
- Attractive to existing large Asian betting markets, with huge potential for opening markets including USA and India



### EVENT HOSTING RIGHTS

- New operating models to have more control to events in key financial markets



### LICENSING RIGHTS

- Identification of commercial partners to establish revenues
- Establishment of table tennis e-sports game
- Creation of merchandising strategy around the ITTF and events



### PLAYERS

- Managing top players commercial rights
- Having influence on developing players in key commercial growth markets



### FUTURE PRODUCTS

- WTT to adopt an innovative approach to the development of new products to drive commercial revenue



- Corporate social responsibility activities complimenting global partners.

# EVENTS & OTHER ACTIVITIES

The two most valuable properties to be developed by WTT are the annual World Table Tennis Championships and the World Tour.

WTT will have the authority to reshape the World Table Tennis Championships' commercial rights and the entire format of the World Tour to drive growth for the good of the sport.

## ITTF WORLD TABLE TENNIS CHAMPIONSHIPS

The staging of annual World Championships, first held in 1926 and alternating between Individual and Team Championships, provides the sport with a valuable annual showcase finals event.

The Championships are already global events, but the reformed structure commencing in 2021 will further expand their reach and drive commercial growth.

NOW

2021 ONWARDS

### WHERE?

#### LOCATIONS

### WHO?

#### PARTICIPATION

### WHEN?

#### DURATION

### HOW?

#### BROADCAST

Iconic host cities from Asia and Europe

Greater competition for hosts from all continents

70 countries representing 75%+ world population

80%+ of countries; all continents to be represented at the finals

8 days (April/May)

Extensive series of events spanning 6+ months, leading to finals of 10+ days

Expanded narrative

Focus on later stages / key matches

All finals matches available live and produced to high standards

## ITTF WORLD TOUR

The ITTF World Tour is already sizeable but has significant scope to expand to more countries / continents and to larger global cities. The Strategic Partner will be central to such developments.

In addition to the marketing of the World Tour, WTT will play an important role in the operation of the World Tour events, working closely with all stakeholders to deliver consistent high quality experiences for commercial partners. The WTT will have the necessary resources and experience to ensure professionalism in all aspects of the World Tour, with a structure that respects the traditions of the sport whilst better showcasing its stars – the players – who will in turn share in its success.



The ITTF has been working with T2 Diamond to put on an innovative series of events aimed at increasing the value of the global table tennis market. The ITTF is collaborating with T2 in 2019 and 2020 to test new innovations and they may, should the series prove successful, be integrated into the ITTF's event series.



## OTHER PROPERTIES

The ITTF is flexible regarding the inclusion or exclusion of other ITTF properties within World Table Tennis. These may include:

A new and innovative form of table tennis, designed to be played anywhere and targeted at engaging a new generation of table tennis players.

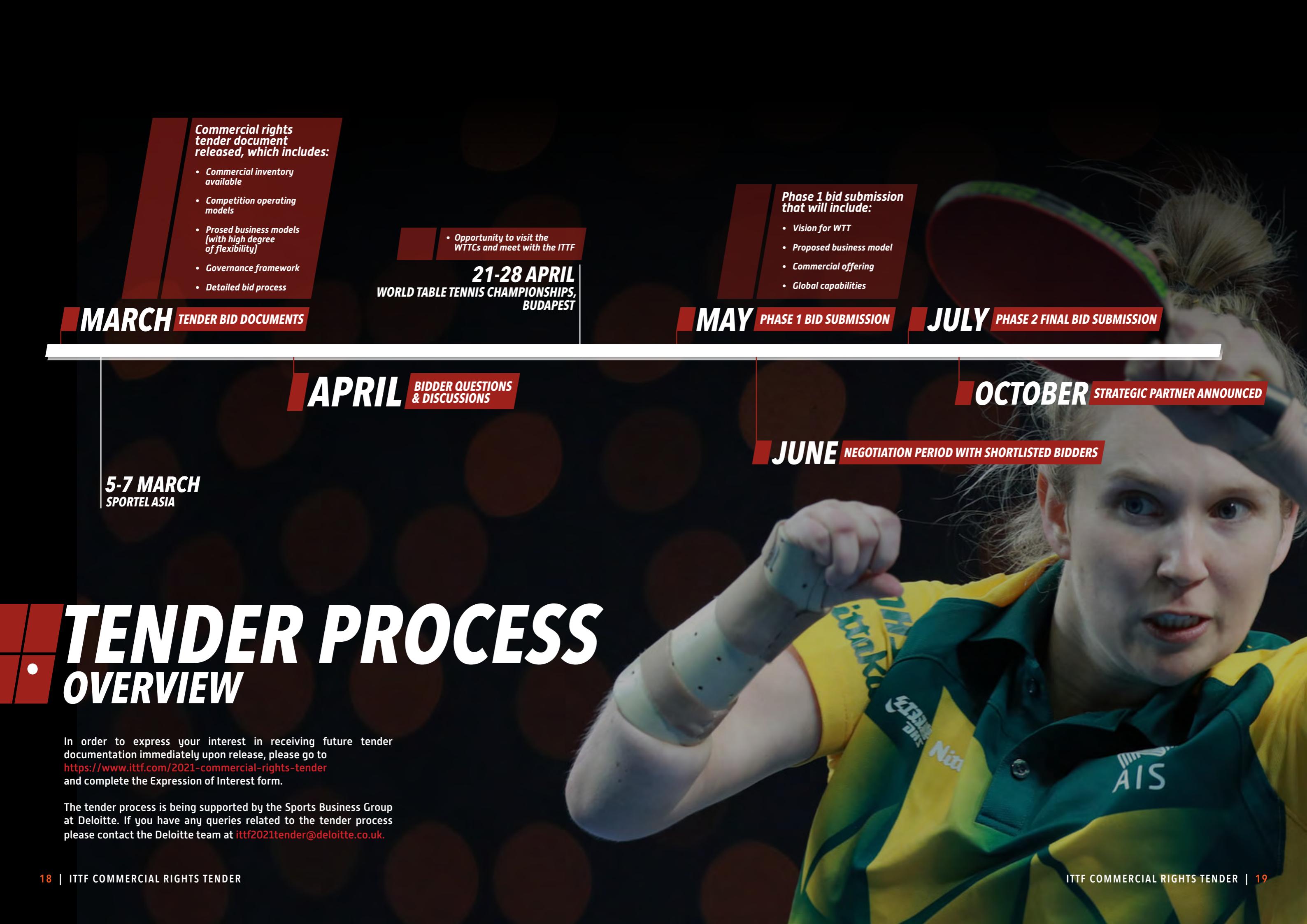


Consists of a series of professional events for players aged 40 and over; over 5,000 people play in the annual Veterans Championships.



The ITTF World Junior Circuit is the only regular table tennis tour for up-and-coming stars to gain valuable experience. The 2018 circuit was split into three tiers of events: four Golden events, seven Premium events, and fifteen Regular events.





**Commercial rights tender document released, which includes:**

- Commercial inventory available
  - Competition operating models
  - Proposed business models (with high degree of flexibility)
  - Governance framework
  - Detailed bid process
- Opportunity to visit the WTTCs and meet with the ITTF

**MARCH** TENDER BID DOCUMENTS

**21-28 APRIL**  
WORLD TABLE TENNIS CHAMPIONSHIPS,  
BUDAPEST

**Phase 1 bid submission that will include:**

- Vision for WTT
- Proposed business model
- Commercial offering
- Global capabilities

**MAY** PHASE 1 BID SUBMISSION

**JULY** PHASE 2 FINAL BID SUBMISSION

**APRIL** BIDDER QUESTIONS & DISCUSSIONS

**5-7 MARCH**  
SPORTEL ASIA

**JUNE** NEGOTIATION PERIOD WITH SHORTLISTED BIDDERS

**OCTOBER** STRATEGIC PARTNER ANNOUNCED

# TENDER PROCESS OVERVIEW

In order to express your interest in receiving future tender documentation immediately upon release, please go to <https://www.ittf.com/2021-commercial-rights-tender> and complete the Expression of Interest form.

The tender process is being supported by the Sports Business Group at Deloitte. If you have any queries related to the tender process please contact the Deloitte team at [ittf2021tender@deloitte.co.uk](mailto:ittf2021tender@deloitte.co.uk).

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The ITTF registered address is at Avenue de Rhodanie 58, 1007 Lausanne, Switzerland.

## **SOURCES**

All figures included in this document have been provided by ITTF unless otherwise stated, specifically:

- Broadcast viewers, unique viewers and hours televised from CSM [various reports]
- Followers, fans and players by country from Nielsen [Understanding Table Tennis Fans 2019]
- Forecast growth of Asian sports market from PWC [Sports Survey 2018]