

The Media–Sport Production Complex: The Case of American Football in Western European Societies

*Joe Maguire**

This article undertakes an examination of the media–sport production complex focusing on the interdependencies between sport, media and marketing organizations. The development of American football in European societies is considered and a more detailed study of its emergence in English society is outlined. This task is undertaken in the context of an appreciation of the commodification of sport and media production more generally.

The development of American football in west European societies over the past decade can be accounted for both by the alleged Americanization of European societies and by the interrelated role played by the media–sport production complex. Discussion of Americanization has been attempted elsewhere (Maguire, 1990). The development of American football in west European societies has arguably less to do with the ‘ludic’/play qualities it may possess and more to do with an interweaving of media–sport production and marketing interests. This article focuses on its political economy and on the crucial role which European media organizations have played in this regard.

Initially, some of the more salient features of the media–sport production complex and the commodification of sport are highlighted. On this basis, a brief and somewhat sketchy outline of the development of American football in Europe in general and a more detailed study of its emergence in English society is provided. Although there are important differences within and among west European societies regarding the development and meaning of American football, the English case-study provides clues to more general trends in the European media–sport production complex. It therefore has the potential to be used by

*Joe Maguire currently lectures in the sociology of sport and leisure. His research interests include the media, sub-cultures, political economy and violence.

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researchers to provide a substantively grounded cross-cultural analysis of specific and more general trends in European societies.

The Media–Sport Production Complex

The media–sport production complex arguably consists of three key groups, sports organizations, media and marketing organizations and media personnel, notably broadcasters and journalists. The nature and form of this interdependency has varied over time and within and between continents. There are, for example, important differences in this regard between North America and Europe. Indeed, in the United States there is greater cross-ownership of sport and media organizations than at present exists within Europe. Further, the nature of this interrelationship also varies from one sport to the next. Some sport organizations, notably well-established male sports, are more successful than others. All sport organizations tend to negotiate separately with the media.

Sports have a largely dependent role in this media–sport production complex, that is, sports organizations have little or no control over the nature and form in which ‘their’ sport is televised, reported or covered. This observation, however, may apply less to American football than to other sports. Nevertheless, this dependency appears to have grown over time and is arguably connected to sport organizations relying increasingly on revenues derived from sponsorship and marketing rather than from more traditional sources, for example spectator receipts and patronage. Sport organizations thus have to ensure that they gain sufficient exposure and are visible in the sponsorship and endorsement marketplace. Media coverage ensures this.

Television/media interest in sport tends to stem from two factors: the relatively low production costs and the potentially high audience ratings. The motivation which lies behind these factors again varies between Europe and North America and indeed within Europe itself. The desire of media organizations such as the British Broadcasting Corporation (BBC) and Swedish Television to hold down costs and achieve ‘high’ audience ratings is closely connected to their need to retain independence and perform what they see as their public broadcasting role. Commercial organizations are also keen to hold down costs and achieve appropriate audience profiles and ratings in order to secure advertising revenue. In addition, satellite and cable companies, such as

Eurosport and Screensport, seek 'quality' sport broadcasts in order to bolster their programme schedule.

The strategy of the media organizations in this media-sport production complex appears to be informed by at least three factors: the existing station style and ethos, scheduling constraints and the market for potential advertisers. Of crucial importance is the social composition of both the media audience and the participants and spectators of the sport covered. Which of these elements is of greater importance varies both from the sport form covered and the potential sponsor and or advertiser. In some instances, the potential sponsor or advertiser may wish to use the media coverage to target one or more of these groups.

Media sport personnel also play a role in this process; that is, in producing a marketable commodity, both visual and verbal media codes are at work. This involves hierarchization, the process of signalling that some things are more important than others; personalization, the presentation of events from an individualized perspective; narrative, the telling of events in the form of stories and the placing of events in the context of frames of reference (Whannell, 1981: 2). More concretely, this aspect of the media-sport production complex enhances the excitement/spectacle value of the sport in the following ways: cutting and editing of the 'live' match; use of camera position, angle and focus; use of slow-motion; use of graphics, music, interviews and 'expert' analysis. In so doing, the sport form 'gains pace', its spectacle value is heightened and thereby its marketable value increased. All of these elements may well have been at work in the emergence of American football in western Europe.

What is the effect of this media-sport production complex on sport itself? Certain key issues deserve attention. Within the sociology of sport a range of critical perspectives agree that sport is being decisively altered by its mass commodification and by its absorption into consumer culture. The cultural reification of sport can be seen as the consequence of those rationalizing processes associated with corporate society. For some critical theorists, the cultural crisis of modern sport is associated with the crisis of ritual, of the public and of the moral athlete. The ritual dimension of sport is lost when the sport spectacle, emphasizing the commercial and mechanical production of winning and sensationalized entertainment triumphs (Alt, 1983: 97). The interests of sports' consumers, the public, have triumphed similarly over the intrinsic

worth of sport. The players themselves have become commodities, oriented towards displaying their talents to the overwhelming influence of the spectators at the game or the viewing consumers of the telecast. Elite sport has been transformed into spectacle, enjoyment from playing becoming subordinate to the crowd-pleasing moves and contrived entertaining style. Corporatization and spectacularization have also resulted in changes in the structure and content of sport to meet market and technical criteria.

With regard to the structure of the sport, changes in its constitutive rules have taken place. Designed to speed up the action, increase ease of scoring and introduce 'sudden-death' action the consequences of these changes has been an increasingly spectacle-centred sport. In addition, the timing of the event may be changed in order to meet the needs of the media and/or of the sponsors and to enhance its appeal as something to be consumed. Closely linked to these developments have been the changes taking place with respect to the form and regulative rules of the sport designed to enliven games by introducing additional rule changes, spectacles, accoutrements and innovative publicity promotions. Values governing the conduct of play which emphasize display, glitz and entertainment gain ascendancy. Intrinsic aesthetic values lose ground, and there has been a shift towards an entertainment value system in which the emphasis is on the heroic and the spectacular.

Changes in the ownership and control of the sport have also occurred. This has taken various forms. More usually commercialization attracts entrepreneurs who either directly, in terms of the ownership of the club and/or governing body, or indirectly, in terms of agents, exercise varying degrees of control over the sport. The sovereignty of the governing body may also be eroded by a number of sources. For example, the influence that outside agencies such as media organizations and sponsoring companies and the involvement of new or existing members and spectators of that sport bring to bear on the decision-making process all undermine the existing power balance and the relative power superiority of the governing body. Given this framework within which to consider both media-sport production and the commodification of sport it is now appropriate to consider the substantive concerns of the present paper.

The Development of American Football in Western Europe, 1978-90

American football is itself the product of cross-cultural assimilation and transformation. During the 1860s the English game of rugby diffused to the United States. In the context of American universities such as Harvard and Yale, this sport underwent a series of changes. Neither the actual diffusion itself, nor the piecemeal reforms which subsequently took place, however, appear to have stemmed from any preconceived master plan (Maguire, 1990). But neither was it simply the consequence of the ludic attraction of the sport. Over the past one hundred years, American football has continued to develop in specific ways, reaching the stage where the SuperBowl, the annual end of season game, attracts television audiences of over 30 million, the networks are able to charge advertising fees in excess of \$675,000 for 30 seconds prime time during the game and the NFL, the sports governing body, currently has a \$1.4 billion contract for broadcast rights over a three-year period. It was not until the late 1970s, however, that American football began to emerge within western European sports culture.

Although no clearly thought out marketing strategy involving the media-sport production complex appears to have then existed, one cannot conclude that the developments that have taken place over the past decade have occurred by chance and are simply the consequence of Europeans suddenly being enthralled by the game's ludic qualities. Table 1 contains data about the initial formation of teams and the number of clubs and players currently playing American football in several western European societies.

At present there is insufficient information available on the dynamics involved in the formation of these leagues. Given the relatively narrow time period in which American football developed in these societies, it may be that, notwithstanding the specific dynamics involved in each country, processes were at work which were pan-western European. One clue as to these dynamics may lie in the development of media coverage of American football and when such coverage first began in each of these countries. In addition, as the case study examining the emergence of American football in England will reveal, the marketing strategy of the National Football League (NFL) may also have played a crucial part in the development of these leagues. Certainly, the European

TABLE 1
The Emergence of American Football in Selected Western European Societies
1978-90

Country	Year of Formation of Teams	Current Number of Teams	Current Number of Players
Italy	1978	114	5000
Federal Republic of Germany	1978	170	7000
Finland	1980	31	1200
France	1981	60	3000
Switzerland	1982	13	600
United Kingdom	1983	152	16,000
Eire	1984	12	400
The Netherlands	1985	30	1500
Spain	1988	12	600

Source: Compiled from data contained in Biddiscombe (1990).

market was to become one of the areas in which sales of NFL merchandise was to increase significantly and, during 1989, Sky Channel's Eurosport, carried advertisements publicizing a European mail order catalogue for NFL goods. Marketing agreements have been reached between the International Marketing Group (IMG), the NFL's agent for Europe, and a range of companies targeting their products on the European market. These companies include Campari and Mister Badge. Knowledge of the effects of such marketing strategies and their relation to the European media-sport production complex is still, however, at a preliminary stage. Clearly more work of a comparative kind needs to be done.

From the data to hand, certain observations may be made about the development of American football in continental Europe. Italy, for example, was the first country to form teams. Its league appears to be one of the more highly commodified, gaining significant levels of sponsorship and attracting American coaches and players. The involvement of the latter in the Federal Republic of Germany (FRG) also appears to have been important in the development of American football in the late 1970s. Given the large number of American military personnel based in the then FRG, this is perhaps less surprising. In Finland, the pattern is different in that the sport remains amateur-based and overwhelm-

ingly involves native players. In Spain the emergence of American football occurred later than in other western European societies and appears to be confined almost entirely in the Catalan area centred around Barcelona.

The first European Nations Championship occurred in 1983 and this was followed by the inaugural EuroBowl in 1986, involving a play-off competition between club teams. Little of this 'European' game is, however, shown on television channels. More recently, media attention focused on the first American Bowl game in continental Europe. Involving two NFL teams, the game was played in Berlin in August 1990. More often, the American football which is shown is that derived from American network coverage of regular season NFL games. In some instances, in the UK and in Eire, the American commentary is also used, but in other countries, in the FRG and in France, native-speaking commentators are used. TWI, the company involved in selling the NFL highlights package to European broadcasters is, in fact, a sister company of the IMG, the NFL's marketing agent for Europe. Given the number of stations currently screening American football, it is theoretically possible to view the game in any part of western Europe. Table 2 highlights those companies involved and the territories they cover in this transmission.

TABLE 2
Television Coverage on NFL American Football by Station and Territory in Europe, 1989-90

Station	Territory
Screen Sport	Europe
Eurosport	Europe
Trans World Sport	Europe
Scansat	Scandinavia
BSB	UK and Eire
Tele 5	FRG and Austria
Sport Image International	Italy
Canal Plus	France and Belgium
TV2	Denmark
TV3	Spain
Veronica	The Netherlands
Vipvision	Finland
Channel 4	UK
RTE	Eire
ASK	USSR

At present, this reflects the preliminary knowledge of the processes at work in continental Europe. Although clearly a number of case-studies regarding the development of this sport form and the role which the media-sport production complex has played in specific countries will have to be undertaken, some insights of a more general kind may be provided at this stage if attention now switches to a more detailed examination of the emergence of American football in English society.

The Development of American Football in England, 1982-90

Though some observers had predicted in the 1970s that American football had the potential to grow in Britain (Chandler, 1978: 146), others suggested that future expansion of American football would 'probably be seen only in America' (Mason, 1974: 232). In the 1970s the game was infrequently reported and, when it was, the reports tended to be short and related to the SuperBowl. American football was only played, for example, by US airforce personnel, and even then games usually took place within the confines of their airbases. Similarly, when audiences (mainly American) did view the game prior to 1982, it tended to be on closed-circuit television at cinemas in London (*The Times*, 27 January 1981).

Britain's commercial television network, ITV, had shown a limited amount of American football, beginning with coverage of SuperBowl V on their World of Sport programme, but was broadcast more for its 'novelty' as opposed to its sporting value (Clarke and Clarke, 1982: 76). Such coverage, however, was brief, edited and intermittent. Radio coverage was also virtually non-existent except on the American Forces Network (*Sunday Times*, 18 January 1987). But during 1982, the 'emergent' stages in the making of American football as a significant, though by no means 'dominant', cultural form within English society were evident (Williams, 1977).

American Football, Channel 4 and Cheerleader Productions

In 1982, the newly created Channel 4 began to screen American football on a regular basis. The sports department of Channel 4 appears to have taken the decision that the traditional form of British sports coverage was no longer appropriate (its remit was to broadcast a diverse range of programmes catering for groups whose interests were not always reflected in the main channel

broadcast schedules). Channel 4 took the video and commentary from the main American television networks, and then used a British production company — Cheerleader Productions — to package the game *via* edited highlights, popular presenters, rock-'n-roll title music and colourful graphics. In 1982 American football was one of only two sports shown by Channel 4. Showing edited highlights of the NFL games, this programme has continued to occupy a central place in the sport schedules of Channel 4. In 1983 and 1984, it accounted for some 20 percent of the sports broadcasting of the station. In 1985, despite diversification into other sports, American football still ranked in the top three of Channel 4's sports programmes (Whannel, 1988). During the period 1982–6, the amount of time devoted to coverage of the regular season remained the same, although this was complemented by increased live broadcasts of the play-off and SuperBowl games, the first live SuperBowl being broadcast in January 1983. In 1987, coverage of American football was increased with an additional one-hour programme being broadcast on Tuesday evenings and by the late 1980s it made up 12 percent of the total sports programming of Channel 4 (Whannel, 1988).

With regard to the audience, during 1987/8, as many as 4.7 million viewers watched during weeks 11 and 12 of the regular NFL season and, for SuperBowl XXII, an audience of 6.1 million was recorded (AGB/BARB, C4). Table 3 documents the growth in audiences watching American football between 1982 and 1990.

TABLE 3
Channel 4's American Football TV Audience Profile 1982/3–1989/90

Year	Average Audience
1982/3	1.1 million
1983/4	1.5 million
1984/5	2.3 million
1985/6	3.1 million
1986/7	2.9 million
1987/8	3.7 million ^a
1988/9	3.32 million ^b
1989/90	2.39 million ^a

^aTwo broadcasts per week

^bThree broadcasts per week

Source: 1982–8: AGB/BARB cited in *NFL Merchandise Catalogue* (1988); 1988–90: Channel 4 correspondence.

According to evidence compiled for Channel 4, there was, initially at least, a substantial increase in audience numbers.

It appears that a plateau, or perhaps even a decline, in the actual number of viewers is evident. Other data support this view. During 1988, American football did not rank in the top ten of individual sport broadcasts (Kelehar, 1989: 42). However, in terms of the percentage share of viewers of specific sports during 1988, excluding the Olympics and magazine-style broadcasts such as the BBC's Grandstand, it ranked twelfth. The percentage share achieved by American football, 1.80 percent, was much lower than snooker (15.39 percent) and soccer (7.08 percent), but was greater than that achieved by such sports as rugby (union and league), motor racing, skiing and basketball (Kelehar, 1989: 42). Such evidence appears to confirm that, while American football may be an 'emergent' sport form in English society, it certainly has not achieved 'dominance'. With regard to the social composition of the audience, analysis of the American football viewer profile appears to have been considered essential to Channel 4, NFL marketing, and their existing and prospective clients. According to market research, again conducted for Channel 4, data are available for the 1985/6 and 1987/8 seasons.

TABLE 4
Channel 4's American Football TV Audience Profile in Terms of Social Class, Age and Gender: 1982/3-1987/8

	Overall Population	1985/6	1986/7	1987/8
Social Class				
AB	19	13	18	20
C1/C2	50	57	56	54
DE	31	30	26	26
Age				
4-15	19	19	22	24
16-35	29	40	39	36
35+	52	41	39	40
Gender				
Men	49	61	63	64
Women	51	39	37	36

Source: AGB/BARB, C4 cited in NFL Merchandise Catalogue (1988).

The viewing audience appears to have an affluent profile with a high proportion of AB and C1 viewers evident. The audience also appears to be predominantly male and weighted towards the younger age groups. This audience profile was significant in terms of marketing strategies, and given that these data have been utilized by Channel 4 and the NFL to further the marketing of American football, comparison with other sports is necessary. While there is nothing unusual in a televised sport attracting a predominantly male audience (Goldlust, 1987: 148-9), there is some evidence to suggest that the situation is more complex than this. Whannel (1988) has noted that some sports, such as snooker, tennis and figure skating, appear to have a greater proportion of women viewers and Kelehar (1989: 43) points to a higher percentage of women viewers for sports such as tennis, ice-skating, equestrianism and windsurfing. But this was out of a total of thirty-three sports covered. With a number of these sports the difference between the number of men and women viewing was relatively small. With American football, however, the relative difference — 60 percent men, 40 percent women — is more significant (Whannel, 1988). Furthermore, while the age profiles of television sports audiences appears to correspond closely to the population as a whole, American football television audiences do appear to be younger (Kelehar, 1989: 43).

This general picture of the trends in viewing figures and of a primarily young, male and affluent audience is borne out by other indices of the development of American football in England. Between 1982 and 1990, for example, there emerged a number of magazines devoted exclusively to the gridiron game, namely *Touchdown*, *Firstdown/Quarterback* and *Gridiron*. *Touchdown* is reported to sell 25,000 copies per issue (*The Times*, 20 January 1984) and *Gridiron* had sales of over 29,000 per copy in 1987 (Audit Bureau of Circulations cited NFL *Merchandising Catalogue*, 1988). A national newspaper, the *Daily Telegraph*, publishes a weekly magazine, *The Daily Telegraph American Football Magazine*, with a readership peak during the last season of some 100,000. Marshall Cavendish, a specialist publisher of magazine collections, produced an 18-part series timed to coincide with the NFL season. The series was heavily advertised on television, including Channel 4, and Part I achieved sales of approximately 275,000 copies. Sales for the complete series were in excess of two million (Connelly, 1987: 53).

Not surprisingly, the readers of these magazines appear to be similar to the viewers of American football on Channel 4. The vast majority of readers appear to be young, male and their social class origins tending towards the C1 and AB groupings (MIL Research, 1986: 2). In catering for this young, affluent and predominantly male group, American football Yearbooks have been published since 1983, and other publishers such as Queen Anne Press have produced a range of titles which are carried in most major bookstore chains. The dissemination of American football literature is not confined to journals and books. In 1987, the *Daily Telegraph* put together a series of eight guides to the game and distributed them free with the newspaper in the London area. According to Licensing Management International, the marketing agent of the NFL, readership increased by between 5 and 10 percent each Friday that it was distributed and 30,000 readers outside the London area subscribed for special postal delivery of the guides (personal correspondence, 1989).

Significantly, during the late 1980s, the *Daily Telegraph* underwrote the production costs of Cheerleader Productions's editing of American football for Channel 4, and the newspaper title is carried on captions when the programme breaks for commercials. More recently, Coca Cola have sponsored the programme. While these examples reveal the interweaving of media and commercial interests in the televising of American football, the underwriting of Cheerleader's production costs for American football is, in fact, nothing new. The production costs for broadcasts in the first year of Channel 4's coverage of American football were underwritten by Anheuser-Busch.

American Football and the Marketing Strategies of Anheuser-Busch

Anheuser-Busch also played a significant role in the development of American football in England in a number of key areas. The investment of £100,000 (\$160,000) in the production costs of televising American football in this country (*The Times*, 23 December 1985) was combined with direct advertising during commercial breaks. Significantly, Budweiser commercials occasionally featured American football players in their attempt to introduce and promote American beer to the British market. In 1986 the marketing strategy of Anheuser-Busch also involved them in establishing the Budweiser League. In doing so, Anheuser-Busch were, in fact, undermining already existing leagues which

had developed rapidly in the three years since the first Channel 4 broadcasts.

During 1983 the first English team, the London Ravens, was formed. During 1984, two leagues, the British American Football Federation and the American Football League UK were established. In 1986, these two leagues merged to form the British American Football League (BAFL). It appears that this decision was in response to the news that Anheuser-Busch were to form the Budweiser League. At this stage some thirty-eight teams played in the BAFL, while seventy-two teams joined the Budweiser League. Significantly, Anheuser-Busch owned 51 percent of the shares in the league and in all clubs (*Budweiser League Yearbook*, 1987: 7).

By 1987, the Budweiser League had expanded to 105 teams with the member clubs nominally owning the league. Of the clubs making up this league, some 60 percent were drawn from southern England. In contrast, most clubs in the rival British American Football League were located in the midlands and the north of England. There appears to be a distinctive pattern to the spread of the game. Although most major towns and cities have a team, the majority of clubs are based in towns in Southeast England, for example the Crawley Raiders, Dunstable Cowboys and the Southampton Seahawks. By 1986, the Budweiser Bowl attracted a sell-out crowd of 18,000 at Crystal Palace. Other indicators of expansion can be highlighted by the fact that by 1988, it was reported that there were 198 senior teams and 16,000 registered players in the UK (Algar, 1988: 58).

The main stumbling block to amalgamation of the various leagues appears to have been Anheuser-Busch's 51 percent share of the Budweiser League. The European Football League refused to recognize the Budweiser League unless such ownership was dropped (*GridIron UK*, 1986: 19). By late 1988, formal ownership had passed to the clubs but the involvement of Anheuser-Busch had not ceased since the company had agreed to sponsor the Budweiser League for the following two seasons. The Budweiser League was again reshaped with Anheuser-Busch and Grand Metropolitan Brewing providing £1 million over three seasons. Currently, such sponsorship is directed at an elite group of twenty clubs, ten of which are based in southern England. The involvement of Grand Metropolitan Brewing is understandable because it produces Budweiser beer in England under licence from Anheuser-Busch (Gratton and Taylor, 1987: 35).

The development of this league structure and of the Budweiser Bowl by Anheuser-Busch was combined with the development of the American Bowl at Wembley Stadium. Played between two NFL teams, the first American Bowl, held in August 1986, was sponsored by TWA, American Express and Budweiser (*The Times*, 11 April 1986). This game was a sell-out with some 80,000 tickets being sold in seven days and ticket prices as high as £20. Television coverage ensured an even wider audience (Connelly, 1987: 54). Following the success of this venture, in December 1986 Anheuser-Busch announced that they were planning to increase their spending on American football in England to more than £1.5 m over the next two years (*The Times*, 20 December 1986). An indication of the success of the marketing strategy is that sales of Budweiser beer have risen considerably in this period.

American Football and the Marketing Strategy of the NFL

These developments also relate to and were reinforced by the marketing strategy of the NFL. The NFL is not simply the administrative arm of the game but is also a trade association which directs the operations of NFL Properties and NFL Films, the revenue producing companies concerned with negotiating TV rights, retail licensing, publishing and corporate sponsor development activities. The publishing activities of the NFL include a range of magazines and books, and each year between thirty and forty business categories are selected and NFL promotion rights are granted which allow the companies involved to promote, advertise and merchandize their own products endorsed with the NFL logo. It would appear, however, that the NFL are aware of limitations developing within their own market, especially with respect to TV revenues (Harris, 1987: 605).

The NFL, not unlike other US multinational corporations, have thus sought to diversify their operations on a global scale (Gilpin 1976). One of its officials, James Connelly, noted in this connection that 'the League now recognizes that international marketing is the key area of future growth potential for the sport' (Connelly, 1987: 52). Three main groups are regarded by the NFL as customers: the NFL fan/consumer, NFL licensees and NFL corporate clients. According to Connelly, the marketing strategy was to 'create, develop and influence a whole new customer base in the UK' (Connelly, 1987: 46). How the NFL achieved these goals in the UK is interrelated with the activities of Channel 4 and

Anheuser-Busch. The first crucial step in the NFL strategy has been to achieve television and media coverage. Connelly also addressed this issue when he argued 'the key . . . to building this marketing business is successful television placement. . . . Once that has been established you can then go in and develop the resulting licensing businesses' (Connelly, 1987: 52). This strategy meshed with the programming policy of Channel 4 which sought to distance itself from the conventional style of British sports broadcasting. Taking their coverage from the main US networks, and with the re-editing provided by Cheerleader Productions, a 'strong programme package' was achieved. The importance of the initial screening of American football in 1982 was not overlooked by either the television companies or the NFL. In 1984, Andrew Croker, marketing director of Cheerleader Productions, commented that 'the high level of interest in the game is television led . . . it is very much a television sport . . . the packaging of the game into highlights tends to allow the game to gain pace' (*The Times*, 20 January 1984).

The effect of rule changes undertaken in the 1970s, designed to speed up the action and increase the potential for high scoring games (Sewart, 1987: 172), was reinforced in England by both the packaging provided by Cheerleader which allowed the game to 'gain pace', and the fact that the original commentary provided by the American networks remained intact. (Goldlust, 1987: 100) refers to this as a 'snap, snap' form of television typical of American network coverage of sport. The crucial role that Channel 4 and Cheerleader played in this regard, and thus in marketing the NFL product, was acknowledged by Connelly when he observed that the NFL were 'very fortunate that . . . there was a Channel 4 and a 'Cheerleader' production who put together a dynamically packaged programme at a good viewing hour' and that this 'created the initial exposure and awareness of our sport that has helped trigger all of the successes we have enjoyed in the resultant licensing areas' (Connelly (1987: 53).

This strategy of promoting the game dovetailed with the NFL operations in other areas of the media. NFL Films and NFL Properties, working through a local agent, Licensing Management International, reached publishing agreements with a number of companies. As noted previously, Marshall Cavendish launched an eighteen-part magazine series devoted to the game, timed to coincide with the 1986 coverage of American football. NFL

licences have also been agreed with other media organizations including Queen Anne Press, Mediawatch International and Ladybird Books. These companies have produced publications such as *American Football Annual Yearbook*, *Who's Who in American Football?*, *Quarterback* magazine and *American Football Book*.

The NFL perceived it to be essential to their operations that their trademark was protected on a worldwide basis. Beginning in 1983/4, this licensing operation has grown to a point where over seventy companies are now involved. The motivation behind this aspect of NFL strategy in the UK was not only to increase profits in the short term, but also to increase awareness of the NFL logo in the marketplace.

A wide-ranging merchandising operation has been matched by the product endorsements which have been secured. These include products such as Marathon chocolate bars (Snickers), 'Wagon Wheel' cookies and Leaf bubblegum. An indication of the 'success' of these operations is that during the period of their promotion, sales of multi-pack Marathon bars went up by 40 percent and 'Wagon Wheels' by 30 percent (private correspondence, Licensing Management International, 1989). Why this association with the NFL should have proved so attractive to particular sectors of English society appears to be related to the Channel 4 audience profile for American football. In recent work conducted by Gallup Polls for the NFL, it was claimed that the NFL market was becoming 'younger and more affluent' (NFL Merchandise Catalogue 1988: 3). This finding corresponds with the general profile of the television audience outlined earlier. More particularly, according to the findings of the market research, 38 percent of all households with children between 4 and 15 were interested in NFL football, and over 50 percent watched it regularly on Channel 4; 33 percent owned some NFL branded merchandise; and 50 percent of households with boys aged 10–15 were interested in the game (Gallup Polls, 1988: 10).

Significantly, 77 percent of the British households (including 91 percent of 16–25 year olds, 75 percent of 25–44 year olds and 86 percent of those in social class AB) considered that products with the NFL shield are of equal or higher quality than most other products (Gallup Polls, 1988). The NFL strategy for their franchising and corporate client arrangements in Britain, therefore, has been to target specific groups identified as being interested in

American football and this identification stems from the Channel 4 programme audience profile. This strategy not only allowed for the possibility of greater profits to be generated in the short term but also allowed the NFL logo to penetrate deeply into the cultural terrain of English society in preparation for the endorsement of a particular set of products. An example of this process is the development of 'Wagon Wheels' cookies. Having reached agreement over NFL endorsement of their product, Burton Biscuits in autumn 1986 arranged a media schedule which involved placing advertisements in a range of children's comics.

This marketing strategy of the NFL and its agent, Licensing Management International, also appears to have played a significant part in arranging the sponsorship package for the 1986 American Bowl involving American Express, TWA and Budweiser (Connelly, 1987: 54). In addition, the NFL provides equipment and instructional advice for Budweiser League teams and allows limited use of the NFL logo on their uniforms. Channel 4 live coverage of Superbowl XXI was complemented by the sale of the official NFL programme, the only difference from the American version being the advertising. In the three days prior to the screening of the game on Channel 4, over 150,000 copies were sold. The success of this strategy is indicated by the increase in the sales of officially licensed NFL products from £125,000 in 1983-4 to over £25 m in 1987 (*The Times*, 30 July 1988). Indeed, in 1982, 60 percent of NFL overseas business came from Canada and Mexico. By 1987, 80 percent came from Europe, in which, as Connelly noted, 'the UK is by far our leading and most successful market' Connelly (1987: 53). According to Licensing Marketing International, NFL football is 'well established in the British high street as a family sport with good opportunities for growth in licensing, publishing and marketing programmes' (private correspondence, Licensing Management International, 1989).

Though the available evidence appears to suggest that an audience plateau, or possible decline, may well have been reached in the UK, these marketing operations appear to have convinced some key officials within the NFL that further expansion in the international marketplace is possible. Early in March 1989, Pete Rozelle, then NFL Commissioner, proposed to the NFL Long Range Planning and Finance Committee that a 'Spring League' be established in Europe, beginning in 1991, and involving NFL reserve team players and European teams (*Daily Telegraph*, 8

March 1989). This strategy was formally agreed by the NFL at a meeting in Palm Springs, California in late March. Given the way in which the NFL have dealt with rivals such as the United States Football League (USFL) (Harris, 1987), it is no surprise that the ownership of the proposed World League of American Football be retained by the NFL (*The Times*, 19 April 1989). In addition, the NFL plans to have a majority shareholding in the franchises established in a number of major cities, including Montreal, London, Frankfurt, Barcelona, Paris and Tokyo (*Guardian*, 8 August 1989). 'Le Quarterback' has entered the French vocabulary and leagues already exist, as noted, in several European countries. Having also established that there was sufficient media interest — from the very companies who sought to secure the contract to supply the edited version of American football to Channel 4, and from European satellite companies such as Sky and Screensport — Tex Schramm, former owner of the Dallas Cowboys, was given the task of developing the new league.

Conclusion

American football has had a fairly significant effect on English society. Considerable growth in participation has occurred. Significantly greater numbers of people also now watch or read about the game, though in the UK television viewing may have peaked or gone into decline. But the spread of American football to the UK has been more than simply a 'sporting touchdown'. It has been used as a vehicle for the merchandizing operations of the NFL and a range of companies and as such has spread out beyond the conventional boundaries of sport. The same may be true of developments in continental Europe.

The process in England appears to have been influenced more by the actions of three key players in the media-sport production complex — that is, Channel 4, Anheuser-Busch and the NFL — than by consumer demand. The making of American football has been contoured by a meshing of interests among these key players. This is not to suggest that the interests of these groups have been or are identical. Indeed, it would be unwise to suggest that any one of these groups was in sole control or able to accomplish all that it may have planned to achieve. Nevertheless, the marketing strategies of these groups have ensured that the spread of this game to western Europe has had a different character to the spread of 'British' sport around the globe in the last century. The

global spread of American football has clearly been influenced by a conscious strategy adopted by the NFL and is also clearly linked to the media-sport production complex. The NFL have proved less dependent in this complex than other sport organizations.

But to argue this is not to fall into a simple cultural imperialist or cultural dope thesis. No one group had a monopoly over the making of American football in England or probably, in continental Europe. No matter how hard the NFL sought to further their marketing strategy, they too were caught up in 'figurational dynamics' (Elias, 1978) which they could not control. Though the game may have been 'television led', and though the market share of products associated with American football may have increased dramatically, this should not be taken as conclusive proof that people have not been actively interpreting the product. Insufficient evidence is so far available with regard to the rest of western Europe to make any firm conclusions and indeed the stage at which market penetration has so far reached may well vary from one country to the next. Nevertheless, IMG, the NFL's European marketing agent is predicting 'tremendous growth' (private correspondence, International Marketing Group, 1990).

These developments need to be considered less in terms of Americanization per se and more in terms of globalization (Robertson, 1990; Featherstone, 1990). Aspects of the complexity of globalization have also been captured by Appadurai (1990) who suggests that it is possible to conceive of five dimensions of social change which are produced in conjunction with global cultural flows: the 'ethnoscapes' which are produced by the international movement of such people as tourists, migrants, exiles and guestworkers; the 'technoscapes' which are created by the flow between countries of the machinery and plant flows produced by corporations (multinational as well as national) and government agencies; the 'finanscapes' which centre on the rapid flow of money and its equivalents around the currency markets and stock exchanges of the world; the 'mediascapes' in which the flow of images and information between countries is produced and distributed by newspapers, magazines, radio, television and films; and the 'ideoscapes' which are linked to the flow of ideas centrally associated with state or counter-state ideologies and movements.

It is arguably the case that each of these dimensions of globalization were at work in the spread of American football to Britain and Europe. If that is the case, it follows that this case-

study may provide a useful illustration of important aspects of global sport development in the late twentieth century more generally. At the level of 'ethnoscapes', for example, the global migration of both professional and college sports personnel was a pronounced feature of sports development in the 1980s and indeed, as part of this process Americans were recruited to British and European American football teams. The flow from country to country of sports goods, equipment and 'landscapes' (for example, golf courses, artificial playing surfaces, NFL playing equipment) has grown to the position as a multi-billion dollar business in recent years and represents a development in sports at the level of 'technoscapes'. At the level of 'finanscapes' stands the fact that the flow of finance in the global sport arena has come to centre not only on the international trade in sport personnel, prize money and endorsements, but on the marketing of sport along specific, i.e. American, lines. In this connection the marketing strategy of the NFL stands out. Crucial in all these regards, of course, has been a development at the level of 'mediascapes', more particularly the development of a 'media-sport production complex' which projects images to large global audiences. Its importance has been highlighted by the present case-study. And last but not least, at the level of 'ideoscapes' is the fact that global sports festivals such as the World Cup, the Olympics and the SuperBowl have come to serve as vehicles for the expression of ideologies which have transnational consequences. Clearly, further comparative analyses of how the media-sport production complex interweaves with these other global cultural flows are required.

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