

Monetising Sports Content







Delivery as of end 2020



HOURS OF LIVE PER YEAR

29.5m

LIVE EVENTS PER YEAR

13,000





Current Landscape in Video

- COVID has changed everything, clubs/rights holders going D2C
- Concrete commercial returns increasingly vital
- New players coming in and disrupting the market
- Rights are changing EFL 3pm KO's, for example
- Users have more exacting standards than ever
- Scalability and reliability central
- Going D2C without a strategy does not = commercial success
- Piracy!



User Expectations

- Users essentially 'locked in' with top OTT services
- Easier to cut the cord from linear, but similar experience expected
- High churn with increased competition for £
- Rights becoming available at short notice (EFL, Carabao, FAC)
- For clubs, still an expectation that content is free
- Users much more wary of what data they give away, and to whom
- Quality, exclusive content is a given



Sponsor Expectations

- The volume v engagement balance is changing
- Targeted communities, rather than huge generic reach
- Tracking and analytics more forensic view
- Reaching the user wherever they are, on whatever device
- Localisation
- Dealing with users' dislike of advertising, be that through tech or relevant ads



Challenges for Clubs

- Lack of digital knowledge within commercial teams
- Old school focus (boards and boxes) rather than digital
- How to price / what is available?
- Restrictions with existing partners / blocklists
- New business vs. add-ons to existing agreements?





Free Model

- Generally ad-supported but internal, as external CPMs are through the floor
- Good for headline numbers platform sponsorship, partner activation
- Leaving data on the table
- Tough to move towards paid options without a clear plan
- What is the benefit of the audience? Conflicts with social



Freemium Model

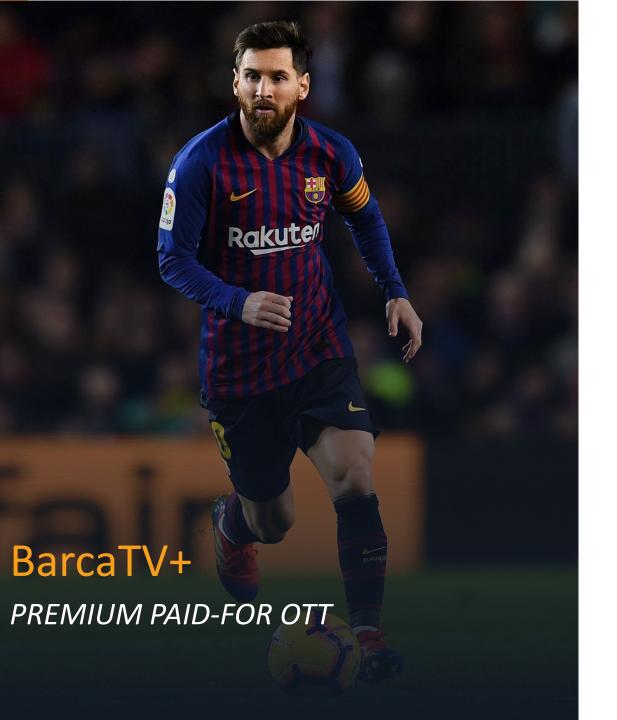
- Drive quality data ask the right questions and get balance right
- Small barrier to entry
- Still possible to support with ads
- Drive new users into single sign on environment
- Data is useless if you don't do anything with it
- Business case direct v indirect revenue



Paid Model

- Easiest to show direct commercials, but pressure is on
- What comes first, content investment or subs?
- Home for your most dedicated fans, which creates expectations...
- ...users expect a quality experience and no/much fewer ads
- Great for exclusive rights, otherwise get creative
- Can you produce enough content?





COMPLEX MULTI-CHANNEL STRATEGY



- Established Barca Studios
- Tiered access structure
- Drives sales of Culers membership
- Localised pricing in various territories
- Premium positioning for partners
- Multi-language approach
- Working around lack of rights how to maintain interest from pre-season
- Integrated experience v separation of video assets



DELIVEROO PRESENTS THE FA CUP



- FA broke ground in retaining rights to 8 ties
- Monetisation v free access
- Using site and video inventory for partner
- Freemium approach to drive traffic
- Supported by paid media spend
- Providing a great fan experience and bringing new fans into the FA ecosystem



FREE ACCESS TO HIGH-VOLUME EVENTS



- SAMG x DAZN x EHF
- Over 1,000 games per annum international and domestic
- EHF heavily hit by COVID
- Long been known for free access
- Data capture in the hundreds of thousands
- Flexible geo-approach in line with rights deals
- Pioneering multi-language commentary



5 Big Themes in 2021

- Analytics!
- Multi platform viewing (smart TV, etc)
- Increased payments flexibility
- Localisation / languages
- AdTech

All leads back to monetisation



Thanks!

Stuart.vose@streamamg.com