



Monetising Sports Content



Sport

ENGAGE YOUR GLOBAL
FANBASE



Media

TAKE CONTROL OF CONTENT



Betting

LOW LATENCY DELIVERY AT
SCALE



Delivery as of end 2020



HOURS OF LIVE
PER YEAR

29.5m

LIVE EVENTS
PER YEAR

13,000

Great Expectations





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?



Commercial Models in Video



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?



Case Studies



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



BarcaTV+

PREMIUM PAID-FOR OTT



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

The FA Player x Deliveroo
MONETISING A FREE FAN EXPERIENCE



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
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- All leads back to **monetisation**



Thanks!

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