

SYNOPSIS

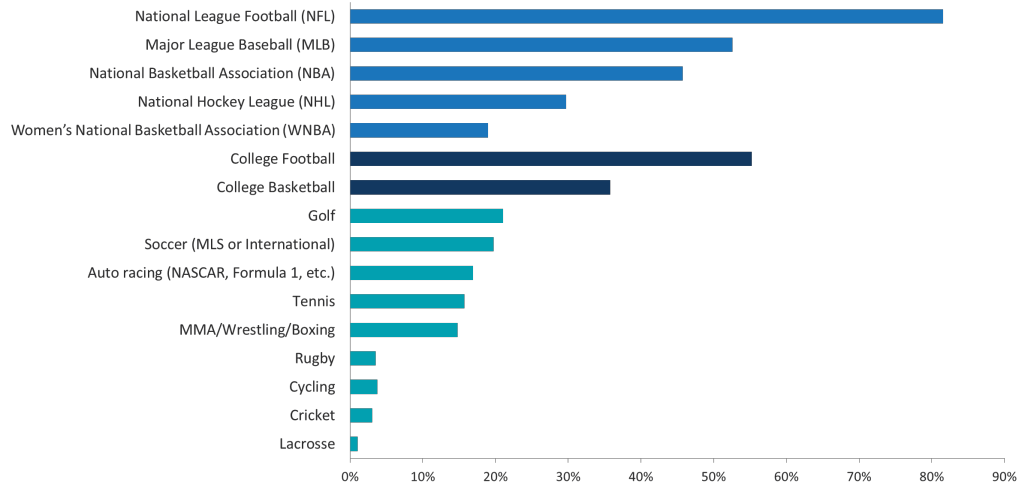
The video services market’s transformation away from pay TV to streaming has disrupted sports media. Sports fans have more ways than ever to engage with favorite teams and watch live matches out-of-market. At the same time, the fan experience is more fragmented as teams and leagues maximize revenue by selling rights to different matches across different streaming, broadcast, and pay-TV properties in the same season.

This study tracks the rise of sports streaming services and tests sports as a driver for uptake of general-purpose streaming services that own major sports rights packages. It investigates major pain points in the sports fan experience and quantifies consumer sports viewing behavior in and out of season. This study tests the appeal of new interactive fan experiences and consumers’ willingness to pay for conceptual sports streaming models.

Number of Slides: 71

AUTHORS

Types of Sports Watched in Season



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Key questions addressed:

1. What are the leading pain points of the fan experience, including game fragmentation/access to live broadcasts and perception of affordability?
2. How has consumer use of D2C streaming sports services changed over time?
3. How many fans churn in/out of sports streaming services between seasons, and what off-season content is most appealing to keep them subscribing all year?
4. Is sports a driver to subscribe to general-purpose streaming services? Are sports fans more likely to take premium subscription tiers, or cheaper ad-based tiers of leading services?
5. What interactive fan experiences interest sports streamers, such as sports betting, alternative broadcasts, live chat, e-commerce, and co-viewing?
6. How much are consumers willing to pay to access all of their favorite team’s games in a single streaming service?

“Like a rising tide, the growth of streaming sports lifts vendors across the streaming ecosystem, including infrastructure providers, technology vendors and broadband service providers. The market is far from settled, as the fan experience gets ever more fragmented, the live event streaming experience lacks reliability, and leagues and service providers experiment with revenue models.”

—Michael Goodman, Senior Contributing Analyst, Parks Associates

Industry Analyst

Michael Goodman, Senior Contributing Analyst, Parks Associates
Jennifer Kent, VP, Research, Parks Associates

Consumer Analytics Team

Yilan Jiang, Senior Director of Consumer Analytics
Sharon Jiang, Consumer Insights Manager
Yuting Mu, Consumer Insights, Analyst I

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Video Services Ecosystem

Sports Viewer Segments

Executive Summary

- Streaming is transforming sports broadcasting.
- Penetration of Traditional vs. OTT Video Services
- Method of Accessing Sports Video Content
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- Top 5 Incentives to Retain D2C Sports Subscribers
- Top 5 Pain Points in Sports Viewing
- % of Sports Viewers Facing at Least One Challenge Watching Sports
- % of Sports Viewers Subscribing to a General Streaming Service to Access Exclusive Sports
- Sports Viewing Preferences by Age
- Appeal of Interactive Sports Features

Key Video Market Trends

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- Streaming TV and vMVPD Provider Market Share, YoY
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ATTRIBUTES

Parks Associates
2301 West Plano Parkway
Suite 210
Plano, TX 75075

972.490.1113 phone
parksassociates.com
sales@parksassociates.com

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