

SPORTS VIDEO TRENDS 2021



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**SPORTS
VIDEO
TRENDS
2021**

INTRODUCTION

Throughout 2020 and the COVID-19 pandemic, sports broadcasting has gone through a period of rapid change, both in front of the camera and behind the scenes. With sporting venues providing limited capacity or having no fans at all, producing live sport for audiences across the globe has become more important than ever.

As broadcasters and rights holders have adapted to remote, hybrid and cloud-based working, many have focused on creating more content for fans and testing new innovative formats for TV, digital and social.

Virtual crowds attending games, more live programming from behind the scenes at venues, training grounds and in player's homes, TV guests joining studio shows from home via Zoom, and huge increase in the volume of social video output that tells the story of sport, even without the fans. Social video content is also increasingly popular on broadcast TV, with videos of fans celebrating in pubs, outdoor fan parks and at home a key part of the sports news experience. Sport needs fans and fans need sport, for those that cannot attend events, new video formats are hugely important. Fans have responded. Video consumption has increased exponentially in the last year. Consumers have had more time at home, and as a result they have branched out to other sports, leagues and types of content than they would usually watch.

Alongside this the adoption of streaming services has skyrocketed. Services such as Disney+, Netflix and Amazon Prime Video have enjoyed rapid growth as consumers search for new things to watch whilst being stuck at home. The proposition is a powerful one for consumers - greater breadth of content, on more devices, with low monthly fees and the option to opt-out at any time.

We wanted to find out what impact this change in content output and fan behaviours have had on sports fan's video viewing and purchasing habits. Are fans looking for the same level of flexibility in sports viewing that they enjoy across entertainment and film? What types of social media content do fans want to see?

In 2019, Grabyo released its first Sports Video Trends report, which explored how fans accessed sports content across Europe, the US and Australia.

This report expands those insights to get feedback from consumers from across the globe. We surveyed over 15,000 consumers from the UK, US, Canada, Australia, France, Spain, Italy, Germany, India, Japan, Thailand, Mexico, Brazil and Argentina.

We asked which types of content consumers are watching, which video subscriptions they pay for, which devices they use and how they see the future of TV and video.

The report provides insights into how broadcasters, media rights holders and media organizations can engage and retain sports audiences through content strategies, with data-driven predictions and forecasts for the future.

The last twelve months have been some of the most turbulent in recent history for the sports industry and this research provides a guide to what this means for sports moving forward. The pandemic changed the experience of sports for fans and it also changed expectations. Sports fans have learnt new behaviours which will be hard to shift, those that adapt to fans needs have the greatest chance of winning.



Gareth Capon
Grabyo CEO

THE BREAKDOWN

The immense reach of sport provides broadcasters, media rights holders and publishers an opportunity to activate engaged, passionate and loyal audiences across multiple demographics and territories across the globe.

Over 1/3 of global consumers currently watch sports regularly, ranking it as one of their top three most viewed types of video.

Since 2019, Grabyo's research has found an **18% increase** in female sports fans

GLOBAL SPORTS: FANS WHO ARE THEY?

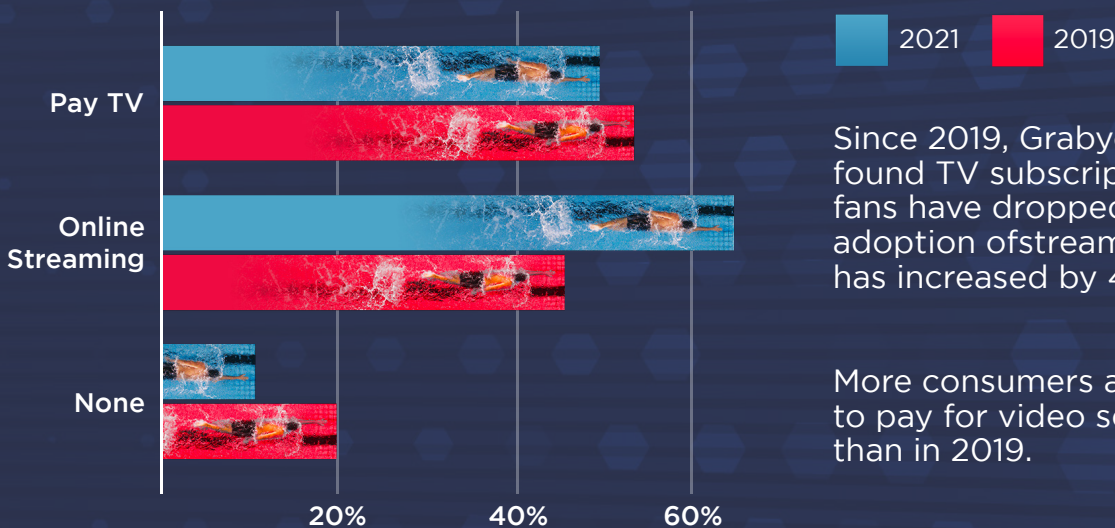


PAYING TO PLAY

Most of the world's major sports properties in leading TV markets are exclusively available through broadcast TV subscription services, leaving consumers with little choice in which video services to buy if they want to access sports content.

However, during 2020 the media buying landscape shifted dramatically, with consumers opting to spend more on streaming services than linear TV. Sports fans are following suit.

WHICH VIDEO SERVICES DO SPORTS FANS PAY FOR?



Since 2019, Grabyo's research has found TV subscriptions for sports fans have dropped 9%, while the adoption of streaming services has increased by 41%.

More consumers are also willing to pay for video services now than in 2019.

This shift is reflected in the successful growth of sports-focused streaming services such as DAZN, ESPN+ and Kayo Sports, who are changing the landscape for live sports production across their respective markets. **The success of these platforms proves one thing for sports streaming services: Build it and they will come.**

WOULD FANS WATCH ON ONLINE STREAMING PLATFORMS ONLY, IF THEY COULD?

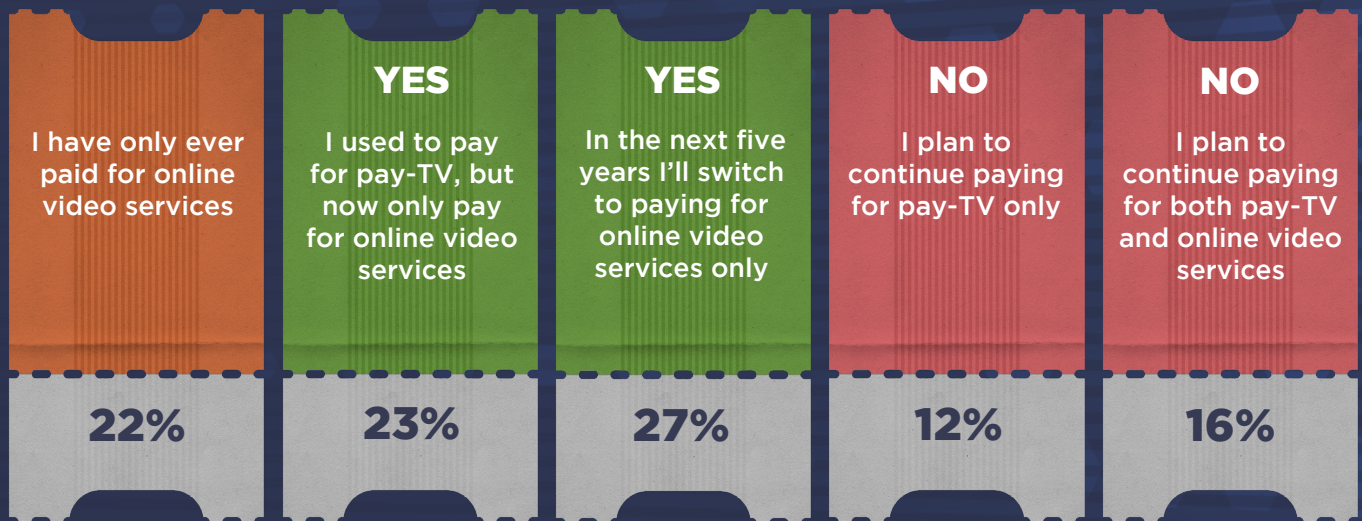


The vast majority of global sports fans indicate that they are willing to move to a streaming-only service that carries live sport. Over half of those surveyed are over 45 years old, which shows that the flexibility of cost, accessibility and flexibility of streaming is now highly valued by consumers of all ages.

CUTTING THE CORD

While many major sports properties are only available through pay-TV services in some markets, the sports media landscape across the world is rapidly changing. Particularly in the US, Australia and Asia, sports-focused streaming services, coupled with the likes of Netflix and Disney+, are making fans reconsider whether they need pay-TV subscriptions at all.

ARE GLOBAL SPORTS FANS PLANNING TO CUT THE CORD, AND ONLY PAY FOR ONLINE STREAMING SERVICES?



Grabbyo's 2019 Sports Video Trends Report found that 53% of global sports fans that pay for video services were considering cutting the cord by 2024. In 2021, the number of fans paying only for digital services is 45%.

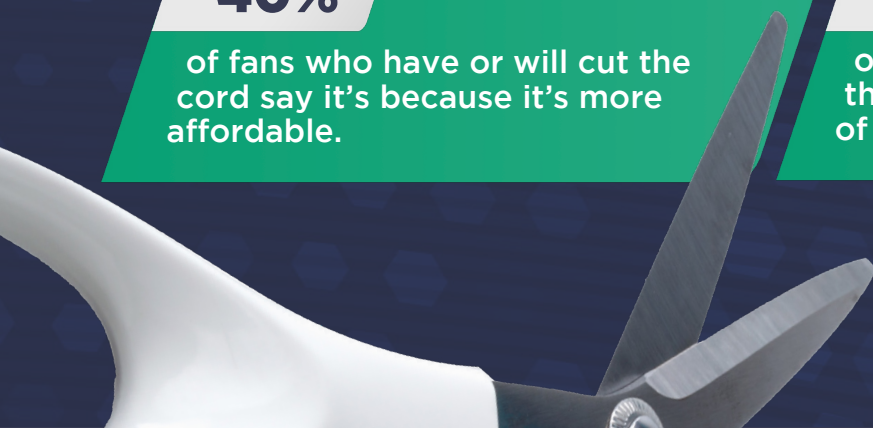
By 2026, our data suggests that the pay-TV market will only have a 28% customer share of global sports fans. Major broadcasters and rights holders must take note, and begin prioritizing their video strategies to match what fans want. The early adopters will take the spoils - ESPN+ already has over 13 million subscribers paying around \$6 per month, while DAZN continually achieves rapid global growth.

40%

of fans who have or will cut the cord say it's because it's more affordable.

58%

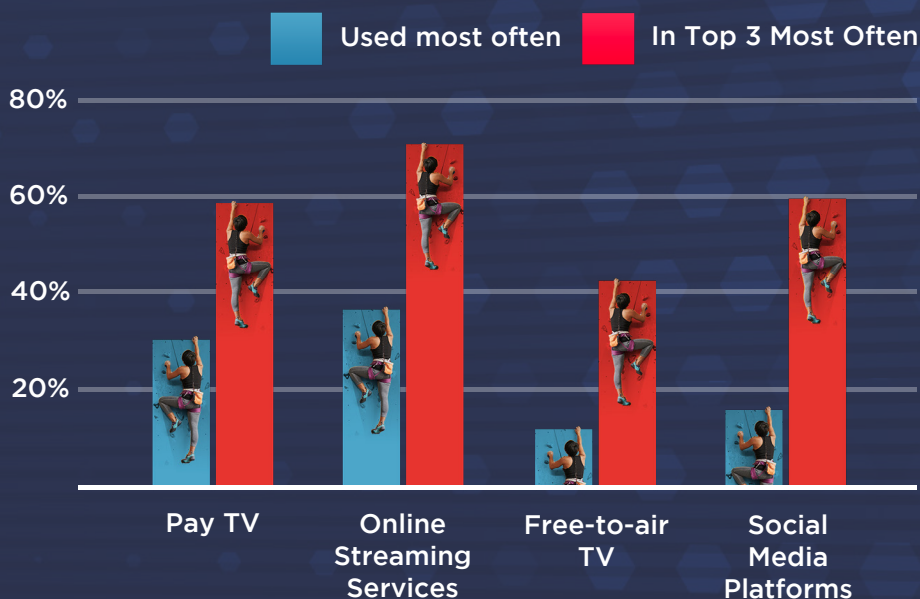
of fans who haven't or won't cut the cord say it's due to the lack of content they want.



ACCESSING CONTENT

Competition for audiences spans multiple platforms and devices. Sports fans are looking for a wide breadth of content, from live sports broadcasts to behind the scenes interviews, and have strong preferences about where each format of content should be available.

WHICH PLATFORMS ARE GLOBAL SPORTS FANS USING TO WATCH VIDEO MOST OFTEN?

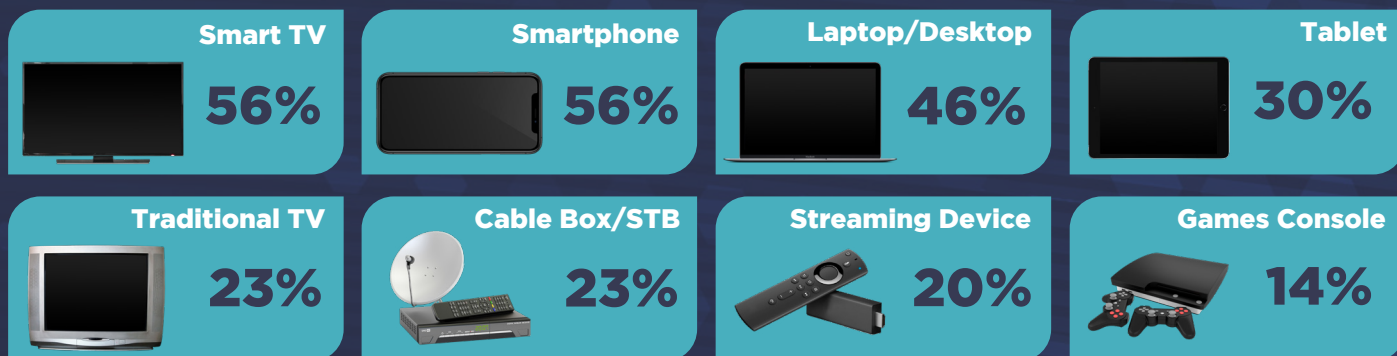


More sports fans use social media to watch video regularly than pay-TV.

While this is not a comparison of minutes watched, it reflects a perception that social media is now on equal footing with pay-TV as a destination for sports video content.

However, more fans who watch on pay-TV report using it most often, likely to gain as much value from their paid subscription.

WHICH DEVICES ARE GLOBAL SPORTS FANS USING TO WATCH VIDEO?

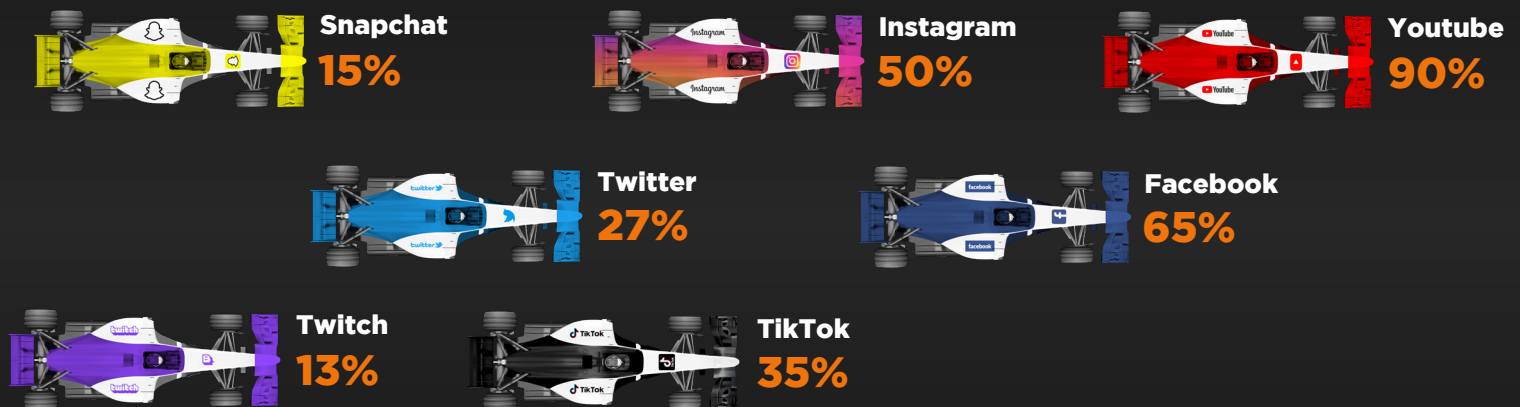


For broadcasters and media rights holders, launching just mobile apps for streaming will soon not be enough - they need to invest in native Smart TV apps, or deliver services through aggregators such as Amazon Prime Video or Roku.

SPORTS ON SOCIAL MEDIA

As established channels for sports and entertainment video, the expectations of consumers accessing content on social media continually increases. Fans are always looking for something new - new formats, new access or new features. Media publishers must continue to innovate while sticking to the fundamentals of each social media platform, hitting the right tone with content optimized for the viewing habits of users.

WHICH SOCIAL MEDIA PLATFORMS ARE GLOBAL SPORTS FANS USING TO WATCH VIDEO?



WHICH TYPES OF VIDEO DO GLOBAL SPORTS FANS WANT TO SEE MORE ON SOCIAL MEDIA FROM BROADCASTERS AND MEDIA ORGANIZATIONS?

65%

Live sports and events

54%

Instant highlights

52%

Short video segments

23%

live shopping streams

Over 65% of fans want to see more live sport and live events broadcast to social platforms. With fanbases often distributed around the world, live social video enables audiences to connect with each other over live content. The interactive features of live social video with real-time comments creates a forum, which creates the communal experience that sports fans are looking for.

SPORTS FANS AROUND THE WORLD



UNITED KINGDOM

- 73%** would watch sports on online streaming platforms exclusively
- 47%** would pay up to \$10 per month to watch sport on a streaming platform
- 38%** would pay up to \$25 per month to watch sport on a streaming platform
- 43%** use social media to watch video regularly
- 55%** want more live events streamed to social media
- 51%** want more instant highlights published to social media



GERMANY

- 74%** would watch sports on online streaming platforms exclusively
- 37%** would pay up to \$10 per month to watch sport on a streaming platform
- 45%** would pay up to \$25 per month to watch sport on a streaming platform
- 52%** use social media to watch video regularly
- 63%** want more live events streamed to social media
- 42%** want more instant highlights published to social media



FRANCE

- 73%** would watch sports on online streaming platforms exclusively
- 54%** would pay up to \$10 per month to watch sport on a streaming platform
- 38%** would pay up to \$25 per month to watch sport on a streaming platform
- 52%** use social media to watch video regularly
- 49%** want more live events streamed to social media
- 53%** want more instant highlights published to social media



ITALY

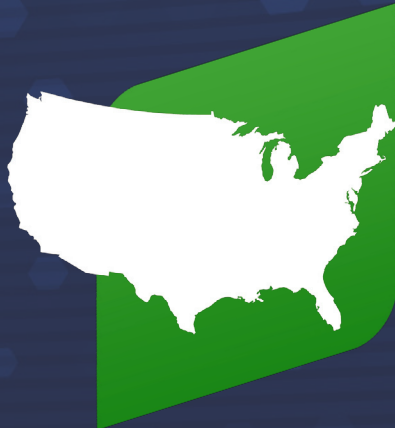
- 86%** would watch sports on online streaming platforms exclusively
- 50%** would pay up to \$10 per month to watch sport on a streaming platform
- 37%** would pay up to \$25 per month to watch sport on a streaming platform
- 51%** use social media to watch video regularly
- 64%** want more live events streamed to social media
- 52%** want more instant highlights published to social media



SPAIN

- 85%** would watch sports on online streaming platforms exclusively
- 42%** would pay up to \$10 per month to watch sport on a streaming platform
- 46%** would pay up to \$25 per month to watch sport on a streaming platform
- 64%** use social media to watch video regularly
- 67%** want more live events streamed to social media
- 55%** want more instant highlights published to social media

SPORTS FANS AROUND THE WORLD



UNITED STATES

64% would watch sports on online streaming platforms exclusively

42% would pay up to \$10 per month to watch sport on a streaming platform

37% would pay up to \$25 per month to watch sport on a streaming platform

50% use social media to watch video regularly

56% want more live events streamed to social media

46% want more instant highlights published to social media



CANADA

68% would watch sports on online streaming platforms exclusively

36% would pay up to \$10 per month to watch sport on a streaming platform

38% would pay up to \$25 per month to watch sport on a streaming platform

54% use social media to watch video regularly

66% want more live events streamed to social media

50% want more instant highlights published to social media



AUSTRALIA

67% would watch sports on online streaming platforms exclusively

36% would pay up to \$10 per month to watch sport on a streaming platform

38% would pay up to \$20 per month to watch sport on a streaming platform

54% use social media to watch video regularly

66% want more live events streamed to social media

50% want more instant highlights published to social media

SPORTS FANS AROUND THE WORLD



INDIA

94% would watch sports on online streaming platforms exclusively

31% would pay up to ₹250 (\$3) per month to watch sport on a streaming platform

37% would pay up to ₹499 (\$7) per month to watch sport on a streaming platform

21% would pay up to ₹749 (\$10) per month to watch sport on a streaming platform

75% use social media to watch video regularly

73% want more live events streamed to social media

62% want more instant highlights published to social media



THAILAND

93% would watch sports on online streaming platforms exclusively

31% would pay up to ฿200 (\$6) per month to watch sport on a streaming platform

36% would pay up to ฿399 (\$13) per month to watch sport on a streaming platform

24% would pay up to ฿599 (\$19) per month to watch sport on a streaming platform

83% use social media to watch video regularly

75% want more live events streamed to social media

64% want more instant highlights published to social media



JAPAN

62% would watch sports on online streaming platforms exclusively

53% would pay up to ¥500 (\$4.50) per month to watch sport on a streaming platform

21% would pay up to ¥699 (\$6) per month to watch sport on a streaming platform

54% use social media to watch video regularly

66% want more live events streamed to social media

50% want more instant highlights published to social media

SPORTS FANS AROUND THE WORLD



MEXICO

92% would watch sports on online streaming platforms exclusively

15% would pay up to MX\$75 (\$4) per month to watch sport on a streaming platform

50% would pay up to MX\$149 (\$7.50) per month to watch sport on a streaming platform

22% would pay up to MX\$299 (\$15) per month to watch sport on a streaming platform

78% use social media to watch video regularly

68% want more live events streamed to social media

58% want more instant highlights published to social media



BRAZIL

94% would watch sports on online streaming platforms exclusively

15% would pay up to R\$20 (\$4) per month to watch sport on a streaming platform

50% would pay up to R\$29 (\$6) per month to watch sport on a streaming platform

22% would pay up to R\$39 (\$8) per month to watch sport on a streaming platform

72% use social media to watch video regularly

67% want more live events streamed to social media

60% want more instant highlights published to social media



ARGENTINA

93% would watch sports on online streaming platforms exclusively

22% would pay up to AR\$300 (\$3) per month to watch sport on a streaming platform

21% would pay up to AR\$399 (\$4) per month to watch sport on a streaming platform

25% would pay up to AR\$499 (\$5) per month to watch sport on a streaming platform

76% use social media to watch video regularly

74% want more live events streamed to social media

55% want more instant highlights published to social media

SUMMARY

79%



of sports fans would watch sport entirely on streaming platforms

65%



of fans want to see more live sport on social media

54%



of fans want to see more instant highlights published to social media

By 2026, the pay-TV market will only have a

28%

customer share of global sports fans



More sports fans use social media to watch video than pay-TV



Adoption of streaming services in sports fans has increased by

41%



Smart TVs are now the most popular device for video viewing among sports fans



Over half of sports fans use their smartphone to watch video regularly



ABOUT GRABYO

Grabyo is the leading cloud video platform. Grabyo's lightweight services are the future of broadcast - equipping partners with the tools to manage agile video distribution strategies across all major digital, OTT and social platforms.

Delivered as a SaaS platform and accessed through a web browser, the platform has strategic partnerships across OTT, social media and broadcast including Twitter, Facebook, YouTube, Instagram, Twitch and Snap. In 2020, Grabyo partners created over 850,000 clips and 21,000 live broadcasts, generating more than 17 billion video views.

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