



# ASIA PACIFIC SPORTS MEDIA 2020

# ASIA PACIFIC SPORTS MEDIA 2020 – COVERAGE

## TRACKS 11 MARKETS IN APAC



Australia



New Zealand



China



Japan



India



Hong Kong



Malaysia



Singapore



Indonesia



Philippines



Thailand

## KEY SPORTS PROPERTIES IN FOCUS



## INTRODUCTION

This report tracks the growth trajectory of sports rights and TV & online video sports revenues across 11 markets in Asia Pacific with historical data & projections as well as analysis of key players & sports properties by geography.

Analysis include -

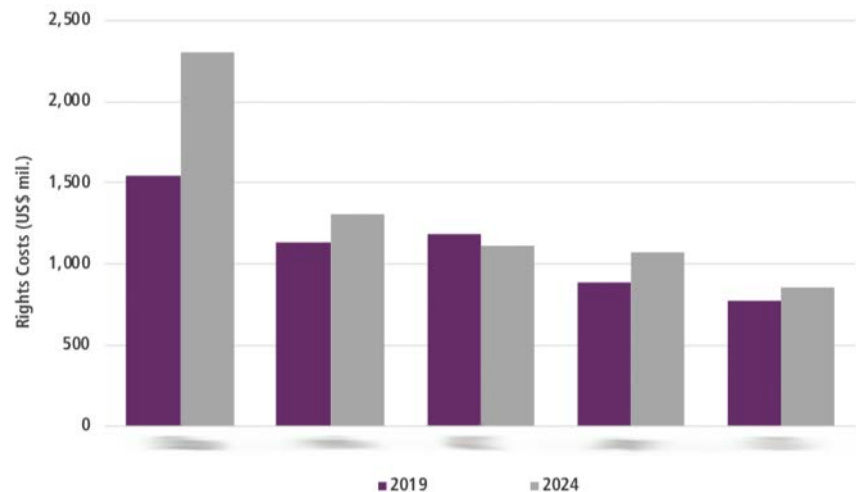
- ▶ Sports rights value & rights owners across key properties by market
- ▶ Share of rights costs by sport by market
- ▶ Sports media value chain by market
- ▶ TV sports subscribers & revenues by market (2018-24)
- ▶ Online video (OTT) sports subscribers & revenues by market (2018-24)
- ▶ TV & OTT sports consumer packaging by market
- ▶ Key media & telecom indicators by market (2019)

## HIGHLIGHTS

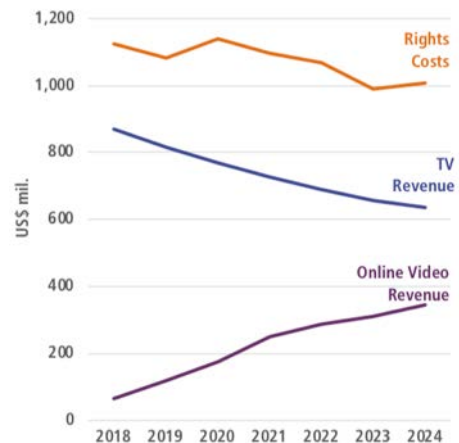
- ▶ Sports media revenues to grow at 7% CAGR in 11 Asia-Pacific markets over 2019-24 to reach US\$7.2 bil.
- ▶ Sports TV revenues will remain relatively flat, reaching US\$4.3 bil. by 2024 while sports OTT revenues climb at 22.0% CAGR to reach US\$2.9 bil.
- ▶ Sports rights costs will grow 3.8% CAGR between 2019-24 to reach US\$6.6 bil. by 2024 across the 11 APAC markets
- ▶ OTT accounted for 21% of sports media revenue generation in 2019 in the 11 Asia Pacific markets. This is likely to almost double over the next five years to reach 40% by 2024
- ▶ Excluding China, OTT will account for 23% of sports media monetization in 2024 across the measured markets, up from 12% in 2019

# ILLUSTRATIVE ANALYSIS

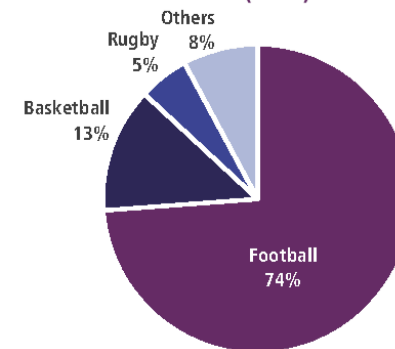
## SPORTS MEDIA RIGHTS INVESTMENT BY REGION



## SPORTS ECONOMICS – REVENUE\* AND COSTS



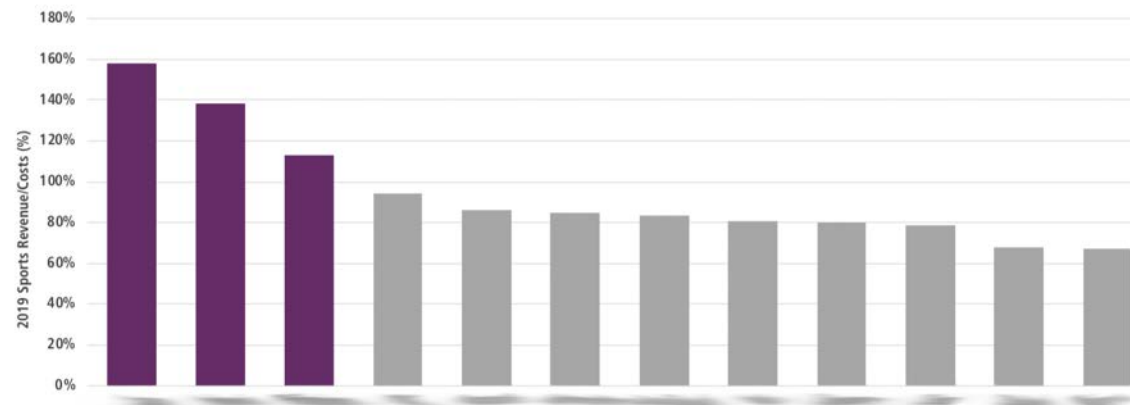
## SHARE OF RIGHTS VALUE BY SPORT (2019)



## TOP SPORTS PROPERTIES BY MEDIA RIGHTS COST (2019)

Property	Rights Cost (US\$ mil.)	Current Rights Owner	Next Renewal Season
Premier League	~1,500	~BBC	2022
UEFA Champions League, Europa League	~1,100	~ESPN	2021
NBA	~1,100	~ESPN	2021
La Liga	~1,100	~ESPN	2021
Serie A	~1,100	~ESPN	2021
Grand Slam Tennis	~850	~ESPN	2021
F1	~750	~ESPN	2021

## SPORTS ECONOMICS – REVENUE/COSTS (2019)



# COUNTRY PROFILE (SAMPLE)

NEW ZEALAND

### SUMMARY

- New Zealand is a small but growing video market with [redacted] in revenue in 2019. Video industry revenues are projected by MPA to grow at 3% CAGR over the next five years with online video growing at 13% CAGR. Pay-TV will experience decline, driven by uptake of online video entertainment and sports services such as Netflix, Neon and Sky Sport Now.

### NEW ZEALAND

#### SPORTS VALUE CHAIN (2019)

#### SPORTS BROADCASTERS SUMMARY

- [Redacted text]
- [Redacted text]
- [Redacted text]
- [Redacted text]
- [Redacted text]
- [Redacted text]
- [Redacted text]
- [Redacted text]
- [Redacted text]
- [Redacted text]
- [Redacted text]
- [Redacted text]
- [Redacted text]
- [Redacted text]
- [Redacted text]
- [Redacted text]
- [Redacted text]

### NEW ZEALAND

#### SPORTS ECOSYSTEM SUMMARY – SUBSCRIBERS

#### SPORTS ECONOMICS – REVENUE\* AND COSTS

Rugby leads the sports rights market in New Zealand followed by Cricket. Seasonal events such as the Rugby World Cup and the Olympics drive incremental growth year on year. Competition between pay-TV operator Sky TV and telco Spark has helped drive growth in rights values in recent years.

OTT growth will boost sports business by 2024

Note: All indicators for YE. \*Includes sports allocated TV and online video revenue (subscription & advertising). Source: Media Partners Asia

### NEW ZEALAND

#### KEY INDICATORS – MACRO & BROADBAND (2019)

#### KEY INDICATORS – VIDEO INDUSTRY

Note: All indicators for YE. | Source: Media Partners Asia

# CONSUMER PACKAGING (SAMPLE)

## HONG KONG

### SPORTS CONSUMER PACKAGING – TV

SPORTS CHANNEL	OPERATOR	TIER	MONTHLY PRICE	TOP PROPERTIES
beIN Sports 1, 2, 3				
Fox Sports 1, 2, 3				
Horse Racing channel 1, 2				
i-Cable Sports				
Sports channel 603, 618				
Sports Plus 1, 2, 3				
Ten Cricket				

Note: All information as of Feb 2019. Average exchange rate US\$1 = HK\$7.8. | Source: Media Partners Asia

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## HONG KONG

### SPORTS CONSUMER PACKAGING – OTT

SERVICE	TIER	MONTHLY PRICE	MODEL	TOP PROPERTIES
beIN Sports Connect				
MyTV Super				
NBA League Pass				
RugbyPass				

Note: All information as of Feb 2019. Average exchange rate US\$1 = HK\$7.8. | Source: Media Partners Asia

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MPA MEDIA PARTNERS ASIA 40



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## REPORT METHODOLOGY

MPA analysis and forecasts in this report are based on a number of factors, including: (1) Interviews with key groups in the industry value chain, including sports broadcasters, sports federations and content distributors; (2) Surveys and interviews with the main pay-TV & online video (OTT) distribution platforms; (3) Proprietary sports-based databases managed by MPA, collating historical information as well as analysis of rights costs, subscriber adoption and revenue generation. MPA analysis of revenues include: (1) Estimated sports allocation of consumer spend on pay-TV and online video subscription; and (2) Advertising revenues on sports properties on free-to-air (FTA) TV, pay-TV and online video. Sports rights costs are estimated bottom-up property-wise by market and include rights to live & ancillary content of sports properties.

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