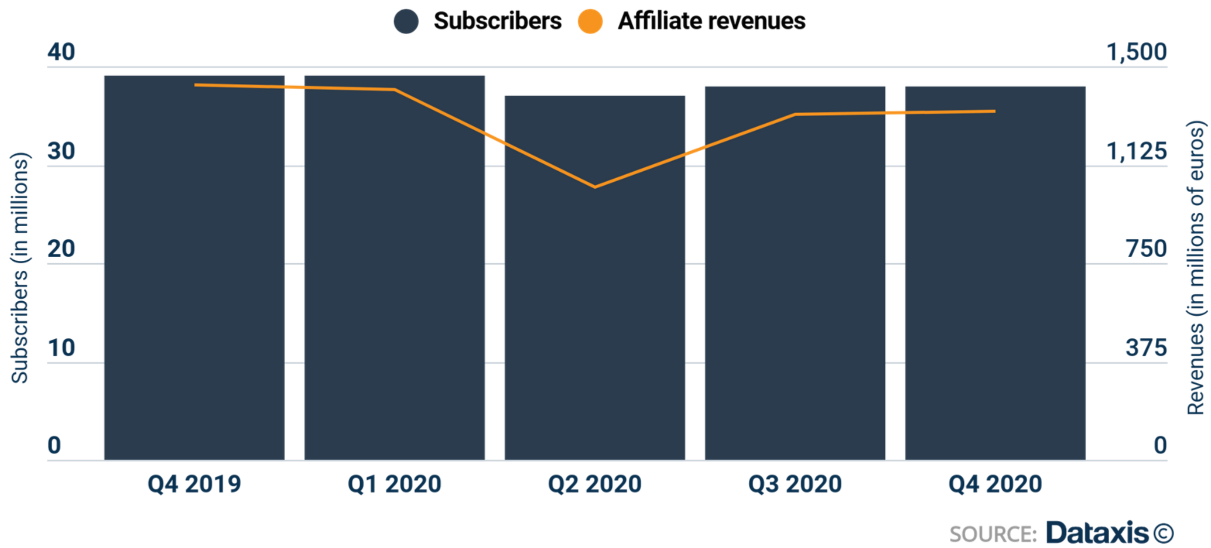
Dataxis

Sports broadcasting and the pandemic: the 2021 review

PRESS RELEASE | 05 May, 2021

In Western Europe at the end-2020, the number of subscribers to premium sports channels has almost returned to its pre-covid levels. Sports broadcasters had been stripped of live programming because of the cancellation of almost all live sports events from March 2020. However, the churn and the loss in subscribers did not hit as hard as one might have expected, as it only intensified an already existing trend due to other factors (such as cord-cutting or piracy).

Premium sports channels' subscribers and affiliate revenues, Western Europe



First, some broadcasters, such as Sky, either allowed their customers to freeze their subscriptions for free (in the UK) or compensated them with additional free content (entertainment in Germany for instance). Second, the likes of Canal+ in France benefited from their generalist model, by offering a wide variety of content, and not only sports, to their subscribers. Canal+ in France has a significant movies and series catalogue, and more consequential, has distribution partnerships, sometimes even exclusive, with the main SVOD platforms. In this regard, the arrival of Disney+, which launched right in the middle of the first wave of the pandemic, around March/April, was particularly interesting for operators. Nevertheless, the boom of such services during the lockdown might become a double-edged sword in the medium term, leaving the consumer to arbitrate between different subscriptions and competing operators. The most affected broadcasters in terms of churn are therefore OTTs like Eleven Sports (which also froze the subscriptions in Portugal for instance during the lockdown) or DAZN, whose offer relies mainly on live sports, and moreover offer flexible monthly subscriptions that are easily cancellable. Besides, almost all competitions have resumed since last September.

©2021 Dataxis - All rights reserved

Revenues, however, have experienced a significant decrease, because of subscriptions being cancelled, frozen or downgraded to less premium packages with lower ARPUs. These figures account for broadcasters' distribution net revenues, and do not even include advertising revenue streams, that showed a massive decrease last year (and which was already a relevant concern in countries like the UK or Italy where there had been a change in legislation regarding sports gambling ads). The return to pre-pandemic levels in terms of revenues will depend on whether sports fans have renewed their whole appetite for sports content.
These figures are part of the new research module launched by Dataxis, dedicated to premium sports channels in Western Europe, North America and Latin America.

Guillaume **Perrin** | Market Analyst

NEW RESEARCH MODULE

Premium sports distribution
Market intelligence services

EUROPE

NORTH AMERICA

LATIN AMERICA

Other market intelligence services

©2021 Dataxis - All rights reserved