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## **Intergovernmental Group of Experts on Competition Law and Policy**

17th Session  
11-13 July 2017  
Room XVII, Palais des Nations, Geneva

Thursday, 12 July 2018  
Afternoon Session

### **Agenda Item 3a. Competition issues in the sale of audio-visual rights for major sporting events**

*Presentation by  
Anna Chanduvi*

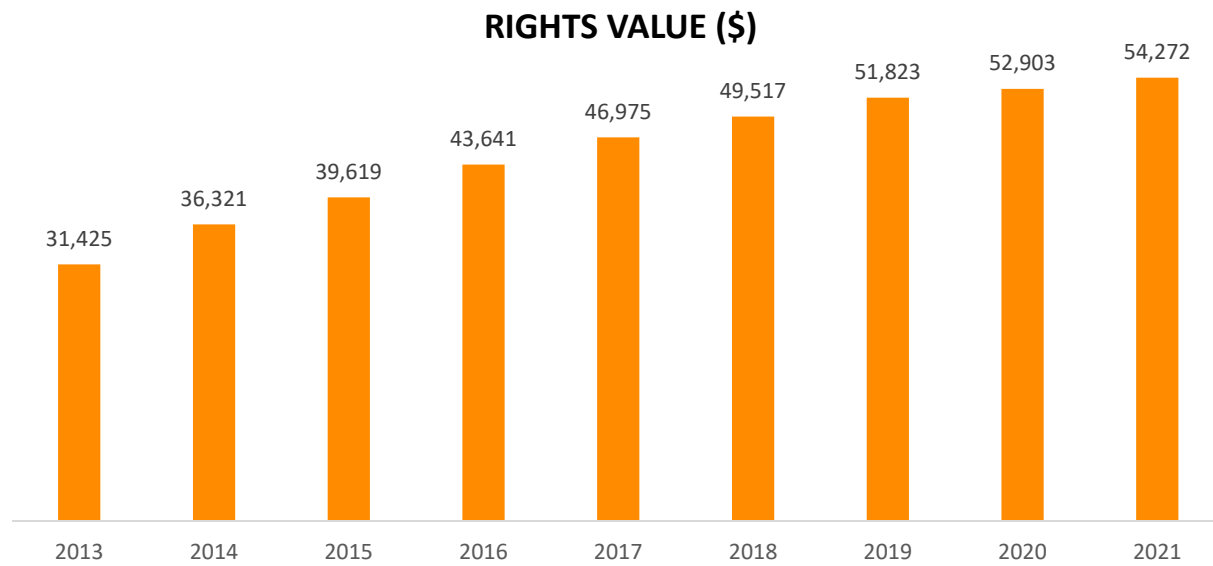
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# **SPORT MEDIA LANDSCAPE**

**WHERE DO WE STAND?**

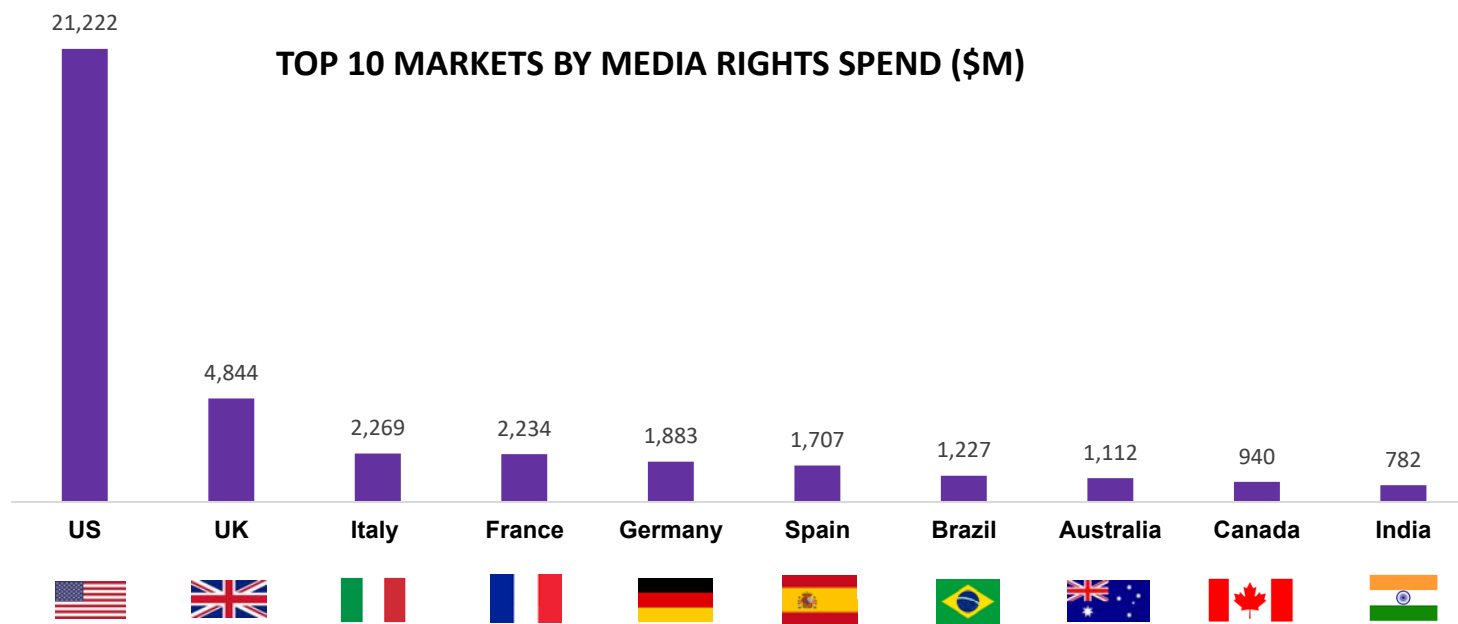
# EXPONENTIAL GROWTH



Source: TVSM Global Report 2017, The Sports Business Group

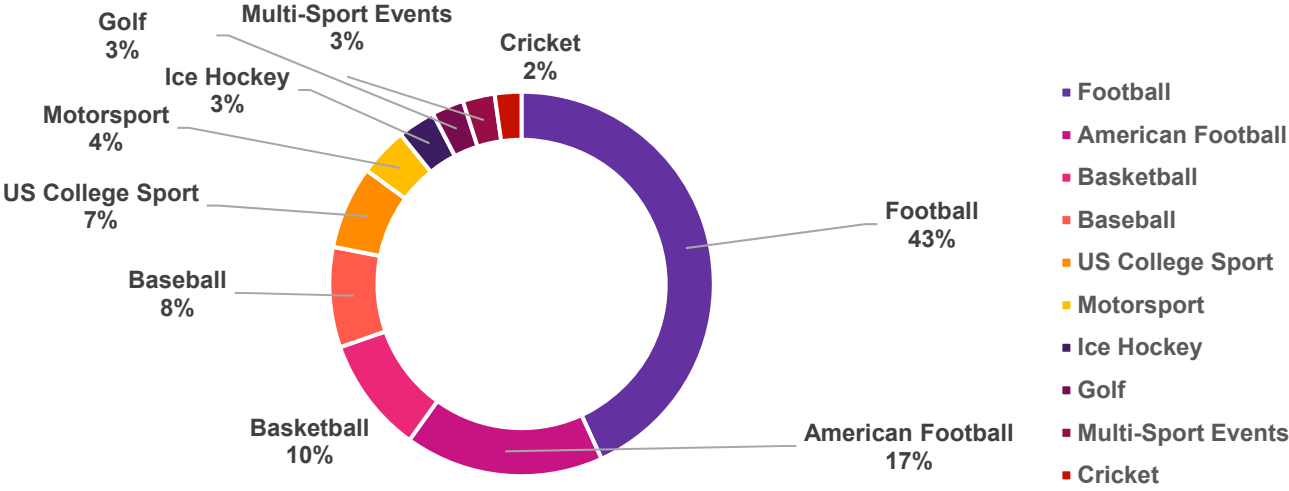
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# TOP 10 PLAYERS



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# 10 SPORTS = 93% OF GLOBAL BUSINESS



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Source: TVSM Global Report 2017, The Sports Business Group

## REGULATORY BODIES ALSO PLAY

1. Increased competition
2. Territory licensing & packaging
3. Listed events (anti-siphoning laws)
4. Anti-cartel regulations

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# **DISRUPTION AHEAD**

INDIVIDUALIZED VALUE CHAIN



## COLLECTIVE TO PERSONALIZATION



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# SHIFTING CONSUMPTION PATTERNS



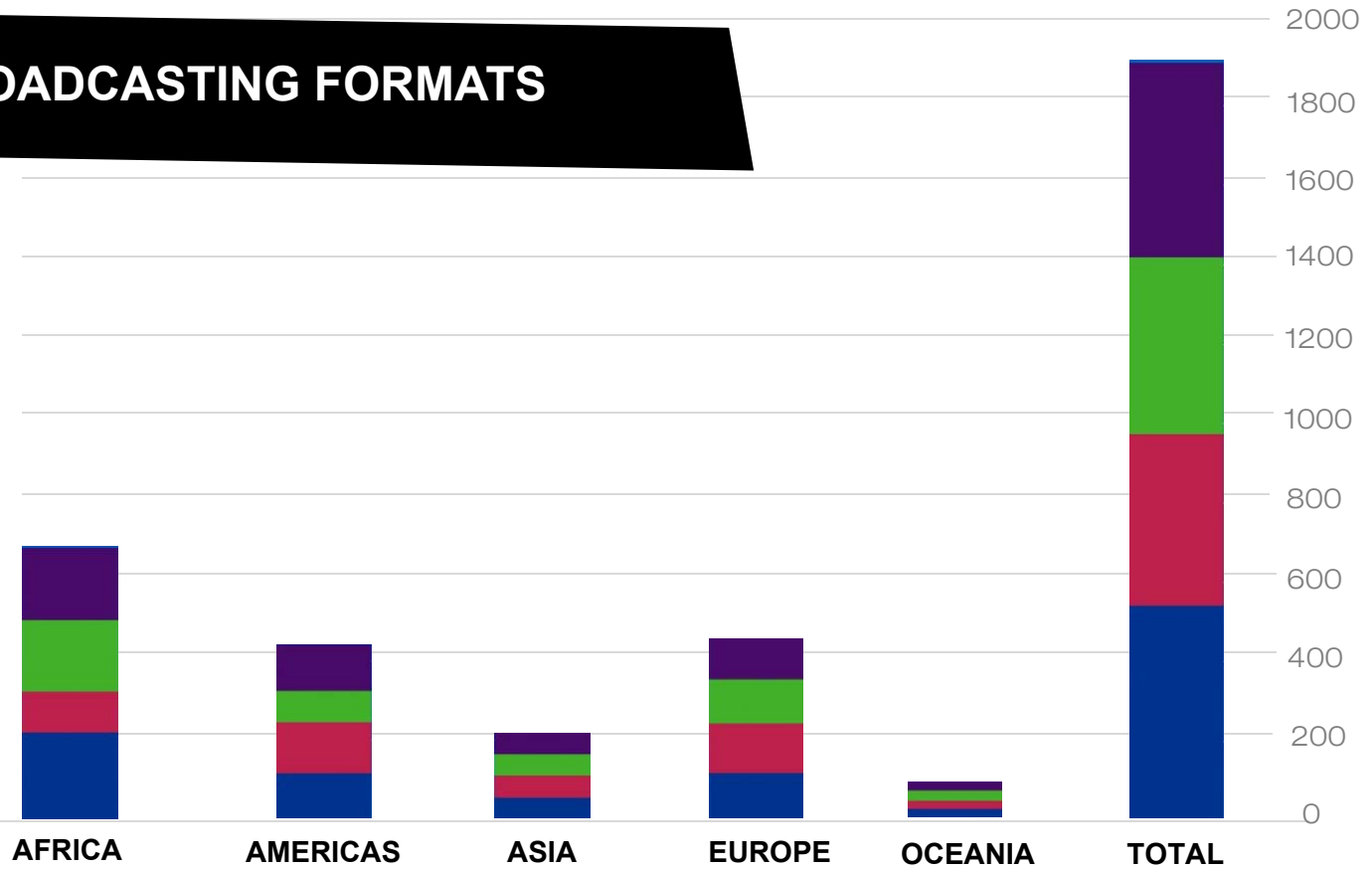
16-24	35-44	45-54	55+
MOBILE: 74%	50%	38%	20%
TV SET: 8%	27%	30%	47%
COMPUTER: 3%	9%	15%	13%

Source: Ofcom Study, 2017

# SHIFT IN BROADCASTING FORMATS



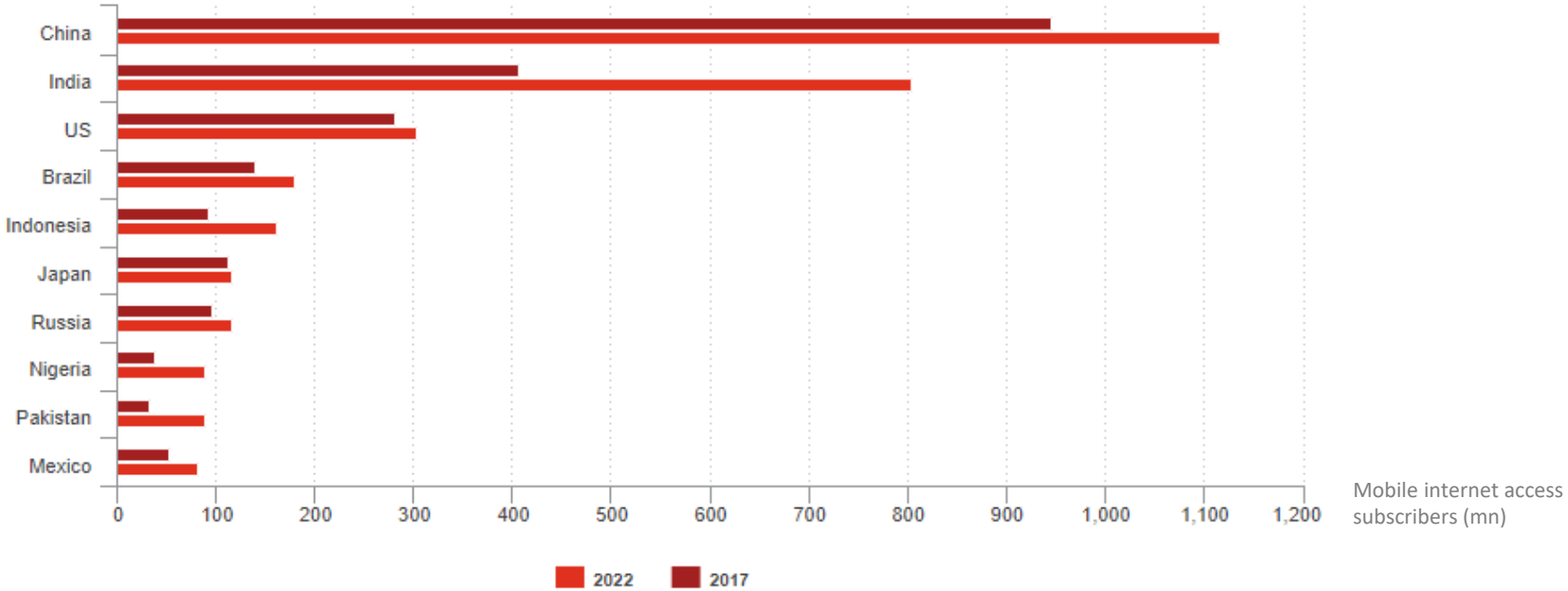
INTERNET  
MOBILE  
RADIO  
TV



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# BROADBAND ACCESS GROWING

Global internet advertising revenues to grow 8.7% CAGR



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Source: PwC Global Entertainment & Media Outlook: 2018-2022. PwC. Ovum

## PIRACY: A GROWING THREAT

**54% of millennials watch illegal streams.**

**Approximately 1/3 of media value whipped of the surface.**

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Source: Guardian, 2017: <https://www.theguardian.com/sport/2017/apr/25/illegal-streams-live-sports-sports-industry-group>

# **NEW BUSINESS MODELS**

# NEW ENTRANTS, ALLIANCES AND CHALLENGES

Entrants



IP Ownership



Blurred ownership



DTC



@LaLiga



LAS SEDES DE **LALIGA**

JAN  
RE  
HO  
2  
GA  
IN  
BUN



## OPPORUNITIES FOR SMALL PLAYERS

- DIGITAL & SOCIAL FIRST CONTENT
- NEW AUDIENCES
- NICHE
- OUTSIDE TO INSIDE



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**THANK YOU**

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