

MIDiA. COVID-19 Media Impact Analysis

Subscription Offer





GBP £3,500

*Usual annual single research vertical price – GBP
£25,000*

COVID-19 is having a clear and direct impact on the entertainment and leisure industries, driven by investor uncertainty – resulting in plummeting share prices – and restrictions on movement of people, leading to quickly-transforming consumer behaviour patterns.

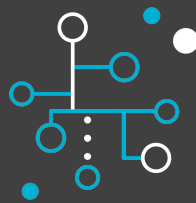
At this time, the questions to ask yourself are:

- Do you have the best strategy to weather current market conditions?
- Should you prioritise certain territories over others?
- What content is relevant to your consumers at this challenging time?
- What are the available opportunities now, and after the pandemic?

To help you navigate through these unprecedented times, MIDiA has put together a special, heavily discounted, 3-month COVID-19 subscription package for smaller sports companies for up to five users.

3-month subscription featuring:

COVID-19 IMPACT ANALYSIS



An ongoing stream of reports focusing on the impact of the Coronavirus on the entertainment industries.

Reports focusing on the economic impacts of COVID-19 and the resulting recession.

Two reports per month on top of existing stream of COVID-19 and recession impact research.

SPORT & MEDIA ANALYSIS



At least x1 report published per month across Sport and x1 report per month in Media.

Reports typically focus on consumer segmentation, emerging trends and technologies, value chain analysis or market specific insights.

Over 200 historical reports available to read and download.

FUSE DATA PLATFORM



Access to our comprehensive database, featuring our proprietary consumer survey data and market models.

This includes global and regional trend data for content consumption, platform and device engagement, revenue and subscriber market shares.

SPORTS RIGHTS BUBBLE

The broadcasting of live sport has been a key part of TV's appeal and underpins the pay-TV ecosystem. However, a combination of entrenched cord-cutting and an ageing audience, as well as tech majors and sport-centric streaming services entering the market means that revenues are now moving out of synch with inflating domestic sports rights costs. Just how long will these rights exponentially increase in value?

PAY-TV

Premium and domestic rights are currently largely owned by traditional pay-TV operators, so for now live TV sports overshadows the streaming disruptors with smaller rights packages. However, audience change is already taking place and cracks are appearing in the traditional model, especially for smaller sports which are losing audience and sacrificing reach for revenue from pay-TV providers.

RIGHTS HOLDERS

The major domestic sports rights in the US and UK will start coming up for renewal in 2021. Will rights holders continue to employ an out-dated revenue over reach model? Will rights holders secure the long-term sustainability of their product by targeting where their fans are found digitally? Optimally placed services to acquire premium domestic rights will display three key principles: sufficient budget capacity, tech capabilities and social reach.

PREMIUM DOMESTIC RIGHTS

Sports-centric SVODs entered international markets, looking to capture digital-native audiences from pay-TV and other established SVODs. Streaming services can struggle when entering a market with insufficient rights offerings. Will the content resonate with sports fans to encourage adoption? The correct mix of rights can lead to increased engagement and adoption for SVOD services, but certain rights in international markets do not yield similar returns.

SPORTS-CENTRIC STREAMING SERVICES

Sports SVODs have struggled to entice subscribers based on their current value propositions consisting mainly of niche rights. Pay-TV has the lion's share of premium domestic sports rights. The move by DAZN to incorporate advertising behind its paywall illustrates a need for pure-play sport SVODs to diversify their revenue streams. How receptive will rights holders be to award these services future rights when they only hold small audiences?

REVENUE OVER REACH

Sports is feeling the squeeze of the peak attention economy. Sports fans are ageing and appealing to a younger digitally-native audience is a fundamental issue that rights holders can no longer ignore. The current spread of distribution deals makes viewing fragmented and expensive for fans, due to the legacy approach of awarding rights to the highest bidder regardless of reach. Is it time to prioritise audiences over revenues?

LEISURE & ENTERTAINMENT

The spread of COVID-19, and the responses of industry and governments alike, is unprecedented. It is, however, the restrictions on movement of people along with the response of consumers and investors that is causing the biggest disruption and will have the most impact on entertainment businesses. What are the potential near / mid-term impacts on entertainment businesses?

RESHAPING DEMAND

The economic disruption and social dislocation caused by the COVID-19 pandemic is not evenly distributed. Some business face catastrophe, while others thrive. Across the entertainment industries the same is true, ranging from a temporary collapse of the live music business through to a surge in gaming activity. Who will be the winners and losers in the entertainment industries?

CHANGING CONSUMPTION HABITS

While It is crucial to remember that many emerging media consumption behaviour shifts are a snapshot of a unique moment in time, there are some changes that will persist post-pandemic. What are the media trends that will become the new normal in a post-COVID world?

IMPACT ON STREAMING

One of the logical conclusions to draw about the extra time people are spending at home is that this will result in a boom for home entertainment. The natural assumption would be that music streaming would see a bump too, however the data is mixed. There are signs of uplift, and there are signs of decline. What is actually going on?

ENTERTAINMENT SPENDING

Even before the global coronavirus outbreak, faltering confidence in the global economy suggested that a recession was looming. With stock markets trending down following the upswing in coronavirus cases, the chances of a global recession are rising. Will entertainment spend suffer as it has done in previous recessions, or will it weather the storm?

COVID-19's IMPACT ON GAMES

Although the effect of self-isolating may lead to increased engagement rates with digital entertainment and media services in the immediate short term, the key concern remains around the wider economic situation and potentially a not-so-short recession once coronavirus is gone. Could games be positioned to come out stronger than ever before?



Get in touch for a demo and more information



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