

Sports Production Perspective: Drivers of Change

Stan Moote, CTO, IABM



Who is IABM?

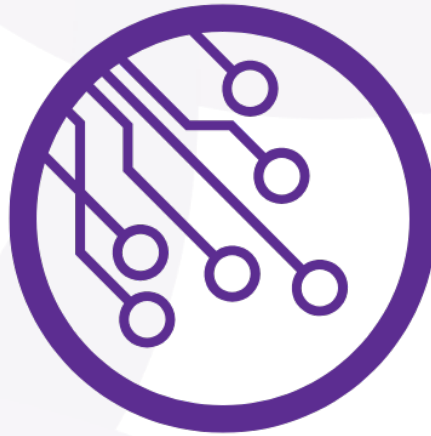
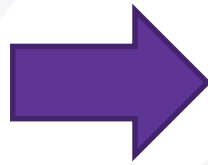
IABM is the international trade association for suppliers of broadcast and media technology. With 500+ members, IABM facilitates the important networking and interaction between suppliers that shape and define the unique ecosystem of the broadcast and media technology industry.



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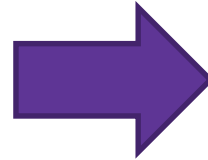
**Drivers of
Change in
Sports
Broadcasting**



**Sports
Broadcasting
Technology
Trends**



Sports: The Jewel in the Broadcaster's Crown



Massive & DVR-proof Broadcast Audiences

Advertising & Subscription Revenues

Audience & Brand Development

Why do broadcasters still pay so much for sports?

***However,
sports broadcasting is changing!***

From Business to Technology

Drivers of Change

Inflation → Rising cost of rights & production demand

Expectations → More than just quality

Experiences → New ways of consuming sports

Technology Trends

Streamline → Do more with less

Augment → With new formats & features

Engage → With new, immersive & personal experiences

Drivers of Change



Drivers of Change

Rising costs, expectations & platforms



Inflation

Pressure from cost of sports rights and demand for new events prompting broadcasters to streamline operations



Expectations

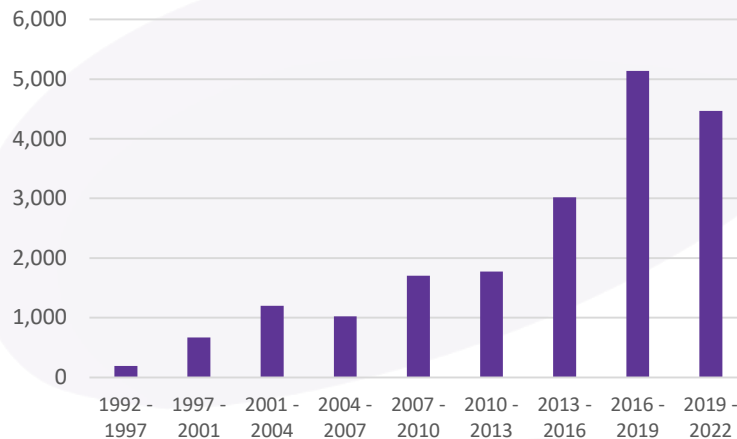
Yes, UHD and VR are important, but AR and data too to power graphics and augment viewing experience



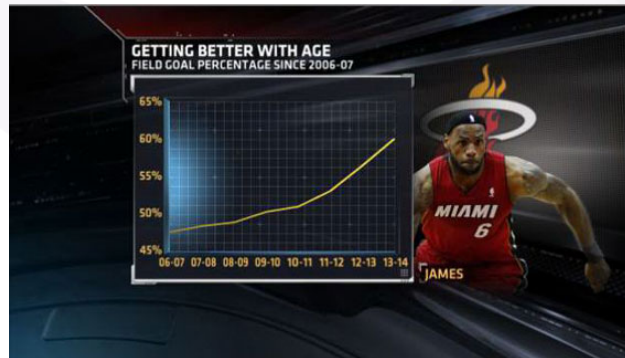
Experiences

Not just streaming, but also eSports and immersive AR experiences to boost engagement

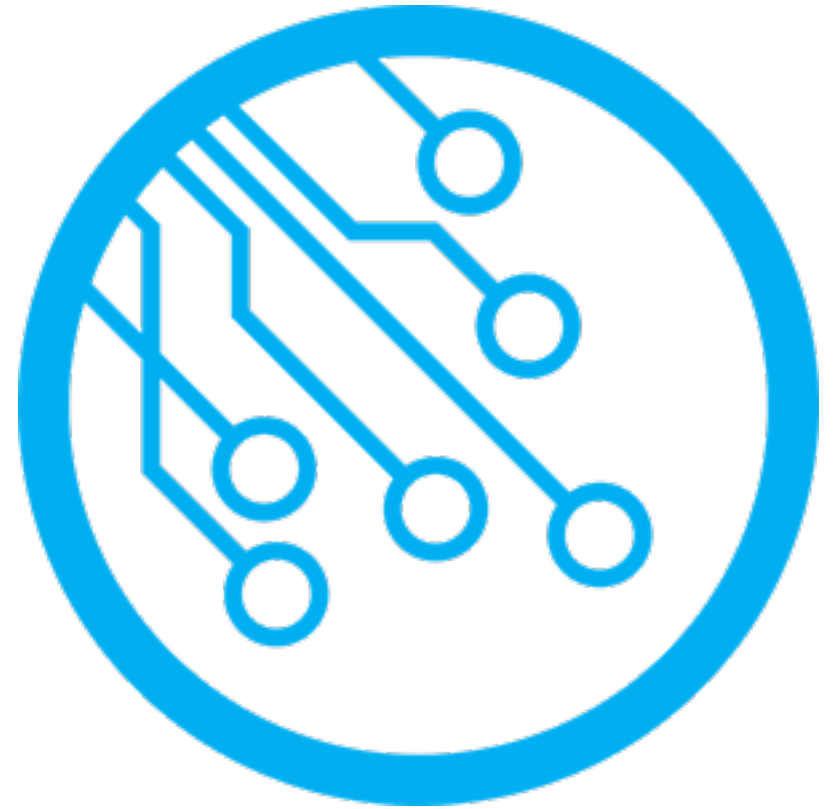
EPL TV rights revenue (£m)



Sources: IABM, BBC, ESPN



Technology Trends



Streamline

The State of Remote Production



Remote production one of the main drivers of IP deployment so far



Cost Savings → Between 20% and 40% savings

Greater Asset Utilization → More productivity

Greater Coverage → More events covered

Major broadcasters have deployed IP & remote production although adoption has been lower than expected



Gradual approach more likely!



***2018 Winter Games' Coverage
More than the previous two
combined!***

Sources: IABM, NEP

Streamline

5G Remote Production



EE, BT Sport demonstrated first 5G remote production in November 2018

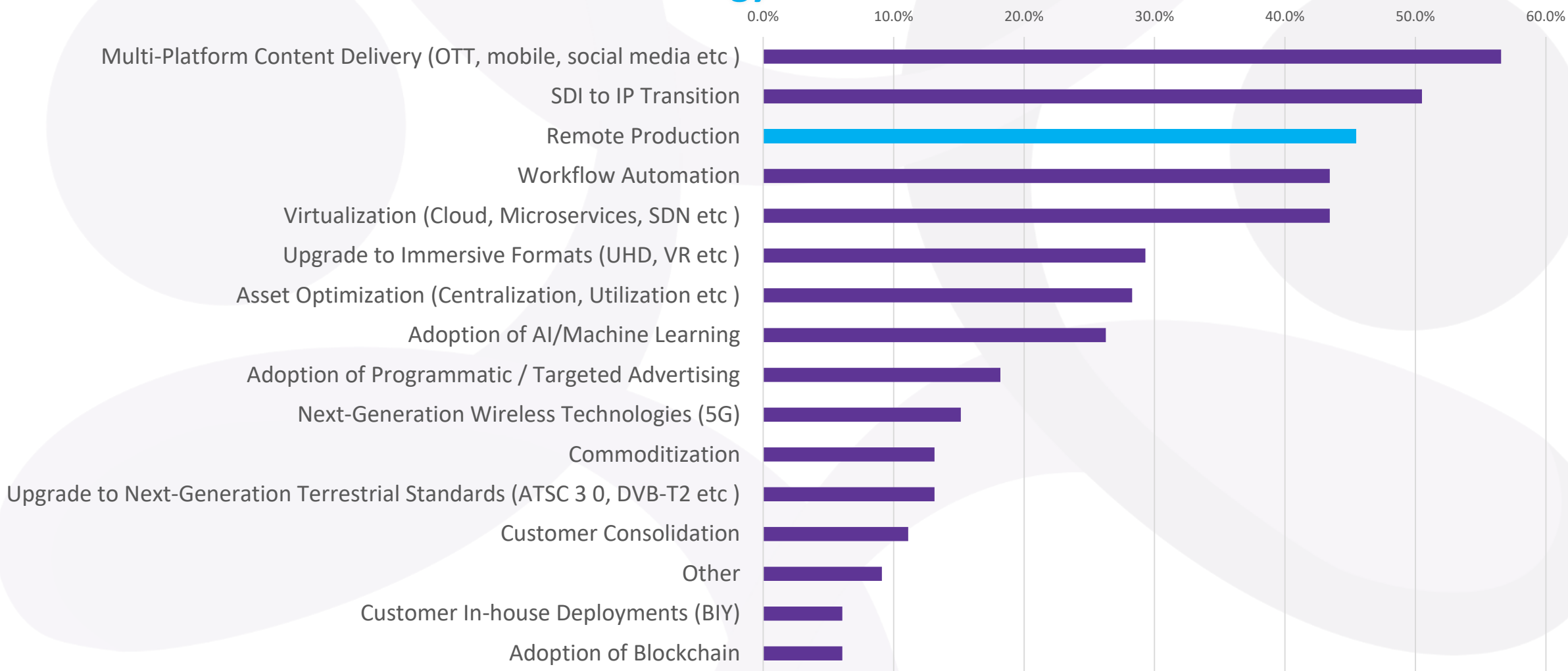
The test network uses EE's 3.4GHz spectrum from its first 5G antenna Wembley, connected to a 10Gbps backhaul link

Sources: IABM, Broadband TV News

Streamline

The State of Remote Production – Technology Demand Drivers

Find out more from the latest IABM Supply Trends Report by [clicking here](#).



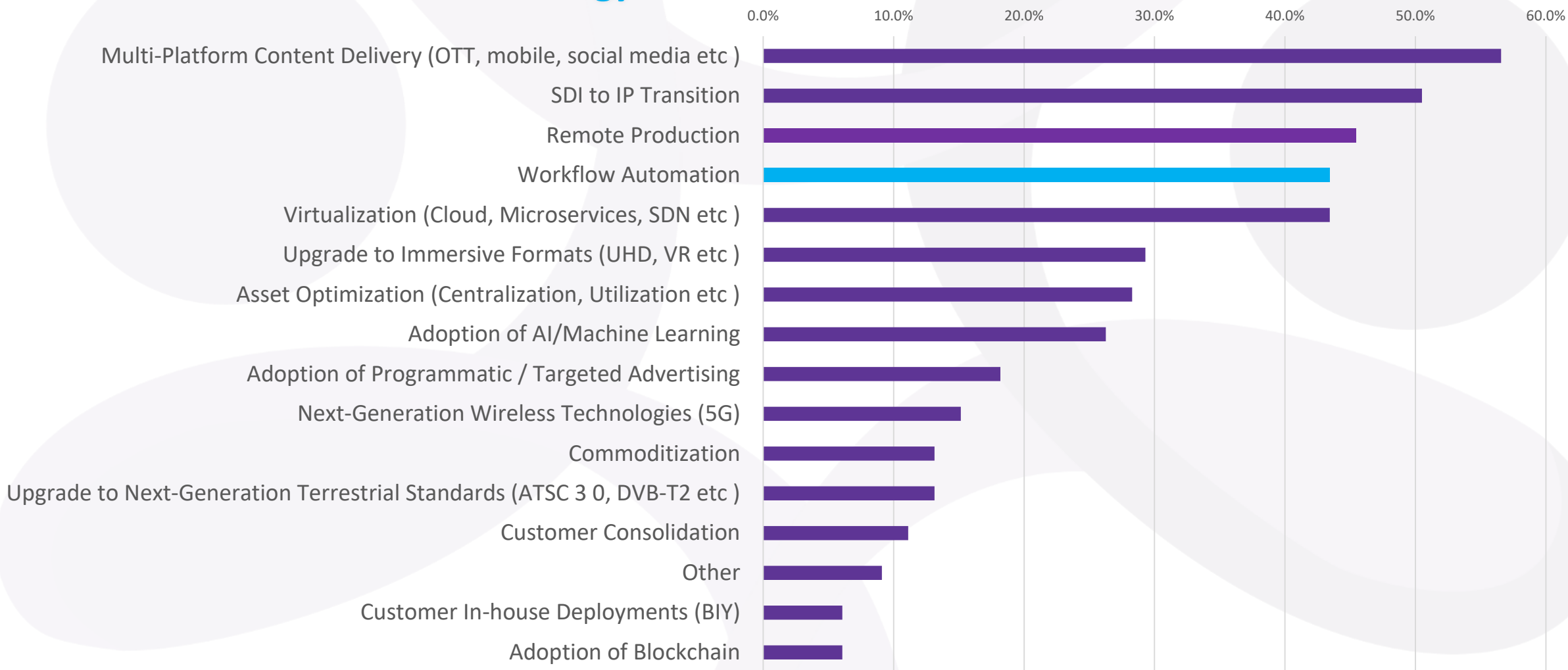
Source: IABM



Streamline

Automation on the Rise – Technology Demand Drivers

Find out more from the latest IABM Supply Trends Report by [clicking here](#).



Source: IABM



Streamline

Automation on the Rise



Launch of ESPN+ in April 2018:
How do you cover thousands of events efficiently?



Automated Production Solutions

Automated Highlights/Clips' Production

Automated Metadata Creation

***Drive for greater coverage at lower costs
is incentivising automation through
AI/Machine Learning***



AI/Machine Learning Investment

Pixellot has now raised more than \$40m. The company has developed AI algorithms which track on-field action and produce automated highlights, automated commentary, a scoreboard and professional graphics, all without the need for live camera crews

Sources: IABM, The Jerusalem Post



Augment

UHD & VR – Better But Still Subdued

Find out more from the latest IABM Media Tech Trends on Immersive Experiences by [clicking here](#).



UHD: World Cup was a Boost

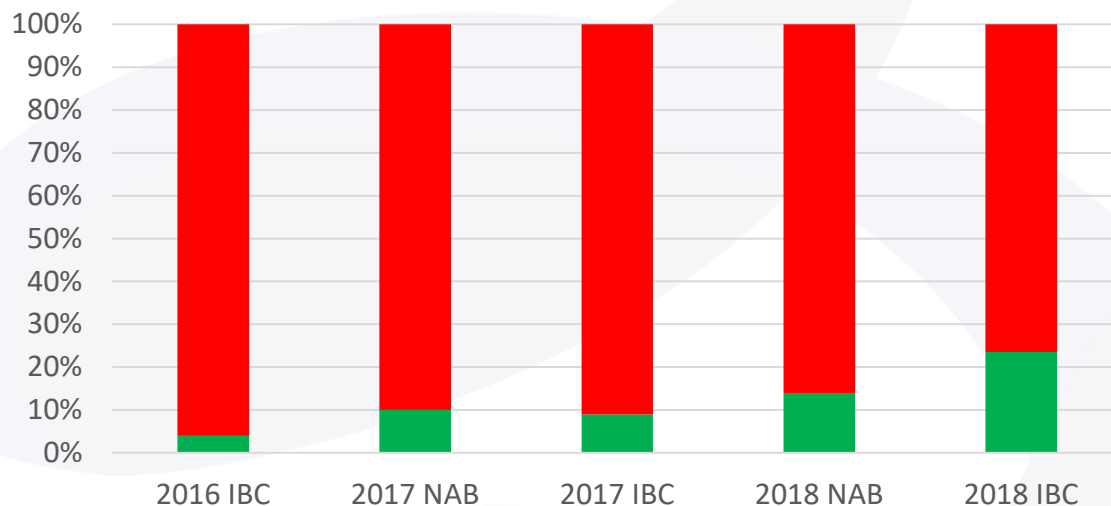
UHD spending greatly benefited from World Cup although it remains the exception rather than the norm. Deployment costs often outweighed by lack of commercial justification



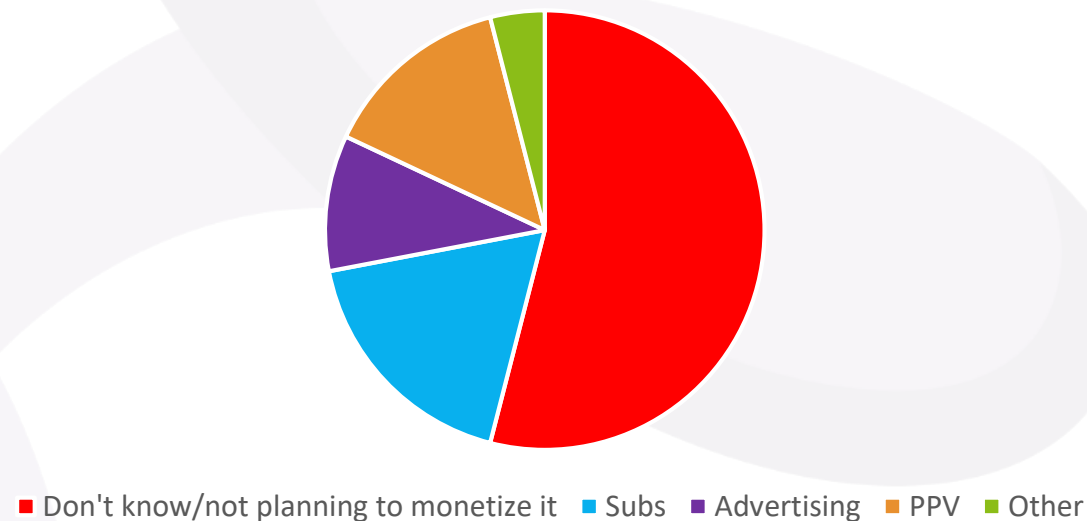
VR: Sports is The Silver Lining

Almost all initiatives in Sports. Many challenges to deployment include: lack of business models, production complexities, consumer adoption, content fragmentation

UHD Adoption - % of Offerings



Lack of Business Models for VR



Sources: IABM



Augment

AR & Data in Production Graphics – No-Brainer

Rise of AR

Rise of data visualization



RTBF's 'Hazard Hologram.'



Data Investment

Stats, a start-up gathering data from sporting events around the world. Signed five deals worth over \$70m in four months!



AR Investment

Many new deployments featuring AR applications to augment virtual sets

**To Retain
Viewers'
Attention!**



With tactical analysis becoming an increasingly important tool in live sports production, we thought LaunchPad could help us better engage fans with dynamic graphics and in-depth analysis of their favourite players and teams.

**Phil Bigwood, EP of BBC TV Sport,
speaking to TVBEurope**

Sources: IABM, Infobae, TVBEurope

Engage

New & Immersive Experiences – Gaming & Broadcast Converge

Rise of eSports

Rise of Interactivity



The King Pro League tournament in Shanghai



eSports Investment

Huge potential, new production principles and skills to suit digital-first approach, sophisticated production equipment



Interactivity Investment

Early developments but some broadcasters are experimenting with AR apps and other interactive tools

**To Engage
With New
Viewers!**



[eSports] can be so much bigger and can offer levels of engagement that conventional sports would be happy to have.

**Arnd Benninghoff, CEO of MTGx,
speaking to IBC 365**

Sources: IABM, Bloomberg, IBC 365

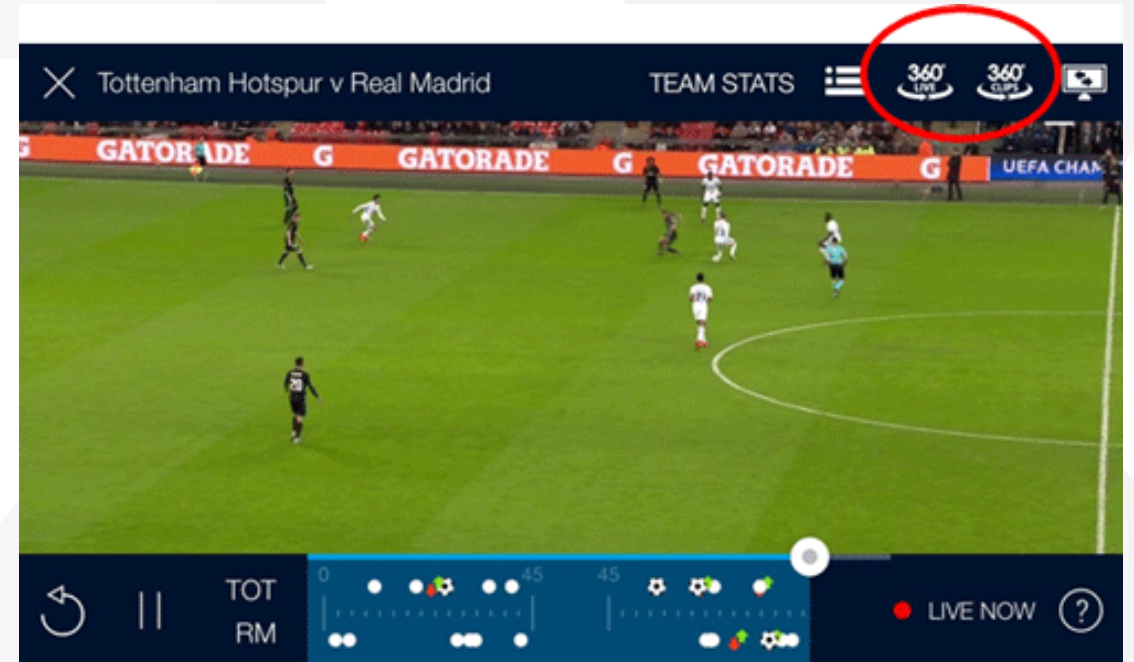
Engage

New & Immersive Experiences – Gaming & Broadcast Converge

NBA AR App



BT's 360 Coverage



Sources: IABM, Engadget, BT

Engage

Personal Experiences – Streaming & Broadcast



Turner acquired iStream Planet in August 2015



Disney acquired BAMTech in August 2017



Endeavor acquired NeuLion in March 2018



Deltatre acquired Massive Interactive in November 2018



OTT Tech Consolidation

Both sports broadcasters and service providers continue to swallow OTT tech companies



Sources: IABM, SVG Europe, Primaonline, Adweek, The Wrap, MMA Biznes



Massive's Axis is a platform that is designed for the future of OTT services, enabling service operators to manipulate and personalise the UI and content experience, maximising value for users and increasing engagement, retention and growth for our clients.

Andy Wasef, EVP global head of OTT products, Deltatre, speaking to SVG Europe

From Business to Technology

How the Sports Broadcasting Industry is Changing

Inflation

Streamline

Remote Production & Automation To Do More With Less

Expectations

Augment

AR & Data Increasingly Used In Production Graphics To Retain Attention

Experiences

Engage

New, Immersive & Personal Experiences To Engage With New Viewers

Sources: IABM

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