Complementary Market Sizing 2005 (sports)

In section 1, we explain who we contacted, and why, in the course of our research into sports markets. We explain the reasoning behind our choice of 6 main players:

- TV-channel sports departments
- Service providers (OB trucks)
- Leagues and governing bodies
- Clubs
- Stadia
- Sports marketing companies

We also explain our methodology for identifying sports DAM applications among references of the most important suppliers of servers, storage solutions, OB-van equipment and media asset management software.

- At section 2, we give some basic information about the sports business, explaining among other things:

The relationship between the 6 categories of sports market players (clubs who own their own stadia, TV stations who subcontract production to services providers, etc.)

The “big money” flowing into sports, especially increases in TV rights payments

The concentration in Europe of 90% of the money in 3 sports (Soccer more than 80%, Tennis, Formula1) and 2 events (Tour de France, Olympic games).

Clubs and and even players are becoming brands in their own right in the 3 rich sports.

The importance of stadia, at crossroads of many industries’ hopes

The new channels of TV distribution on big screen and bars

The evolution of rights ownership from the league, to the clubs and ultimately to marketing companies such IMG.

Rights ownership drives re-utilisation of video and therefore DAM applications

Club budgets is for the moment mainly used for purchasing players, and that other expenses such as DAM may be less attractive than a new striker

Subcontracting to service providers is the rule for live sport as well as for magazines

In section 3 we give our inventory of the 185 sports DAM applications in the world, identifying 9 categories of application:

We analyse the most frequent applications: video coaching, live & highlights, in-house entertainment …
Clubs are the most frequent users of applications followed by TV Channels …
North-America constitutes A certain % of cases, Europe x%, Asia-Pacific y%.

We discovered that where ingesting items of information is sport-specific, it is usually delivered by DAM suppliers through customisation of a single IT application, except for coaching where parts are and must be specific: statistics and presentation, simulation, graphic analysis tools.

"Score, clock and timing" applications do not interface with DAM application except in one project. Those systems are for the moment only interfaced with the broadcast on-air graphic tools for live production.

All 9 applications are made of the same component basic functions (such as live scripting, editing, web distribution …): p functions for live, q for production, r for content distribution

We also notice that only n % of DAM applications cover multiple categories of application, such as doing live & highlights production while at the same time preparing archiving. There are currently more "islands" than optimal workflow: no smart re-utilisation of metadata, but a lot of repetitive inputting.

In section 4, we regroup the 9 categories of application into 4 main segments:
We identify the most important players in each of the segment :

We give the basic of our estimates in volume and in $:
- Numbers of clubs, number of stadia, (identification of several categories)…
- Budget of each category of applications according to a panel

We estimate the 4 segments represent a market size of x $m, starting with p $m in 2004, with different evaluation for Europe, North America, Asia

In conclusion we analyse the different segment and try and evaluate order of priority for a MAM editor.
We analyse the possible partners for penetrating the different segments of the market.