

By Jennifer Kent, VP, Research, and Eric Sorensen, Sr. Contributing Analyst, Parks Associates

| Synopsis  | Willingness to Pay  |                 |            |        |     |            |     |        |     |          |     |          |     |          |     |                    |     |                    |     |          |     |                  |     |      |     |
|---|---|-----------------|------------|--------|-----|------------|-----|--------|-----|----------|-----|----------|-----|----------|-----|--------------------|-----|--------------------|-----|----------|-----|------------------|-----|------|-----|
| <p>The sports consumer's experience is moving online and away from traditional pay TV, resulting in yet another sector of the pay-TV demographic to cut the cord. This report examines these trends and provides an overview of the pay-TV sports media landscape, OTT video services across the sports genre, direct-to-consumer trends in sports, and the sports streaming consumer experience. It assesses new revenue opportunities such as sports wagering and non-fungible tokens (NFTs). The report includes a global five-year forecast for OTT sports service subscriptions and revenue in the US.</p> | <p style="text-align: center;"><b>High Likelihood to Pay \$20/Month for All Games, by Fan Base</b></p> <table border="1"> <caption>High Likelihood to Pay \$20/Month for All Games, by Fan Base</caption> <thead> <tr> <th>Sports Category</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>Soccer</td> <td>63%</td> </tr> <tr> <td>MMA/Boxing</td> <td>55%</td> </tr> <tr> <td>Tennis</td> <td>52%</td> </tr> <tr> <td>NBA fans</td> <td>45%</td> </tr> <tr> <td>NHL fans</td> <td>44%</td> </tr> <tr> <td>MLB fans</td> <td>38%</td> </tr> <tr> <td>All sports viewers</td> <td>37%</td> </tr> <tr> <td>College Basketball</td> <td>35%</td> </tr> <tr> <td>NFL fans</td> <td>34%</td> </tr> <tr> <td>College Football</td> <td>33%</td> </tr> <tr> <td>Golf</td> <td>30%</td> </tr> </tbody> </table> <p style="text-align: right;">© Parks Associates</p> | Sports Category | Percentage | Soccer | 63% | MMA/Boxing | 55% | Tennis | 52% | NBA fans | 45% | NHL fans | 44% | MLB fans | 38% | All sports viewers | 37% | College Basketball | 35% | NFL fans | 34% | College Football | 33% | Golf | 30% |
| Sports Category   | Percentage  |                 |            |        |     |            |     |        |     |          |     |          |     |          |     |                    |     |                    |     |          |     |                  |     |      |     |
| Soccer  | 63%   |                 |            |        |     |            |     |        |     |          |     |          |     |          |     |                    |     |                    |     |          |     |                  |     |      |     |
| MMA/Boxing  | 55%   |                 |            |        |     |            |     |        |     |          |     |          |     |          |     |                    |     |                    |     |          |     |                  |     |      |     |
| Tennis  | 52%   |                 |            |        |     |            |     |        |     |          |     |          |     |          |     |                    |     |                    |     |          |     |                  |     |      |     |
| NBA fans  | 45%   |                 |            |        |     |            |     |        |     |          |     |          |     |          |     |                    |     |                    |     |          |     |                  |     |      |     |
| NHL fans  | 44%   |                 |            |        |     |            |     |        |     |          |     |          |     |          |     |                    |     |                    |     |          |     |                  |     |      |     |
| MLB fans  | 38%   |                 |            |        |     |            |     |        |     |          |     |          |     |          |     |                    |     |                    |     |          |     |                  |     |      |     |
| All sports viewers  | 37%   |                 |            |        |     |            |     |        |     |          |     |          |     |          |     |                    |     |                    |     |          |     |                  |     |      |     |
| College Basketball  | 35%   |                 |            |        |     |            |     |        |     |          |     |          |     |          |     |                    |     |                    |     |          |     |                  |     |      |     |
| NFL fans  | 34%   |                 |            |        |     |            |     |        |     |          |     |          |     |          |     |                    |     |                    |     |          |     |                  |     |      |     |
| College Football  | 33%   |                 |            |        |     |            |     |        |     |          |     |          |     |          |     |                    |     |                    |     |          |     |                  |     |      |     |
| Golf  | 30%   |                 |            |        |     |            |     |        |     |          |     |          |     |          |     |                    |     |                    |     |          |     |                  |     |      |     |

**Publish Date:** 4Q 22

“Content is king and sports content is the most valuable and unique content a service can acquire,” said Eric Sorensen, Sr. Contributing Analyst, Parks Associates.

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| List of Companies     |               |
|-----------------------|---------------|
| ABC                   | NBC Universal |
| Apple                 | NCAA          |
| Amazon                | Netflix       |
| Are You Watching This | NESN          |
| Bally Sports/Sinclair | NFL           |

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| <p>Bellator<br/>Buzzer<br/>Comcast<br/>Charter<br/>Discovery+<br/>Disney<br/>DirecTV<br/>Dish<br/>ESPN<br/>FloSports<br/>Formula One Racing<br/>FOX Broadcasting<br/>FuboTV<br/>FIFA<br/>Google/ YouTube TV<br/>Hulu<br/>Live Soccer TV<br/>MLB/MLB.tv<br/>MLS<br/>NBA/NBA.TV</p> | <p>NHL<br/>Nielsen<br/>Peacock<br/>Peloton Interactive<br/>PGA<br/>Quickplay<br/>Paramount+<br/>Showtime Sports<br/>Spectrum<br/>Sports Media Watch<br/>Sports Tribal TV<br/>Stadium Maps<br/>StreamLayer<br/>SimWin Sports<br/>ThinkAnalytics<br/>UFC<br/>USA Hockey<br/>Warner Media<br/>Yahoo Sports</p> |
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| Attributes  |  |
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