



SportBusiness  
CONSULTING

# Global Media Report 2018

Executive Summary  
and Preview



The SportBusiness Consulting Global Media Report is the 2018 edition of what was previously published as the TVSM Global Report.

As with previous editions, the 2018 Global Media Report provides an in-depth examination of the sports media rights landscape.

The report is based on data and insight from SportBusiness Media, powered by TV Sports Markets. The SportBusiness Media team of editors and analysts gather, compile and analyse the most accurate and trusted media rights data in the industry, providing high-quality data, market insight and commentary.

The SportBusiness Consulting team has then conducted further research and in-depth analysis to draw out the industry's key trends and issues throughout 2018, and these have been brought together in our 2018 report.

Highlights and extracts from the full report can be found over the following pages, including:

- **Global market overview**
- **Top 10 sports**
- **Top 20 sport properties**
- **Top 10 markets**

The full report will soon be available on [sportbusiness.com](http://sportbusiness.com) and contains full detailed data and analysis on each of the above sections, plus additional special focus analysis on:

- **Market focus – USA**
- **Focus on OTT**
- **What to look out for in 2019**



# Global market overview

The global value of sports media rights was just over \$49.5bn in 2018, up from \$46.8bn in 2017. Year on-year growth is expected to continue, with a CAGR of 5.6% meaning the market is forecast to break the \$50bn-barrier in 2019 and reach almost \$53.3bn by 2021.

TOTAL GLOBAL VALUE OF SPORTS MEDIA RIGHTS BY YEAR (\$M)



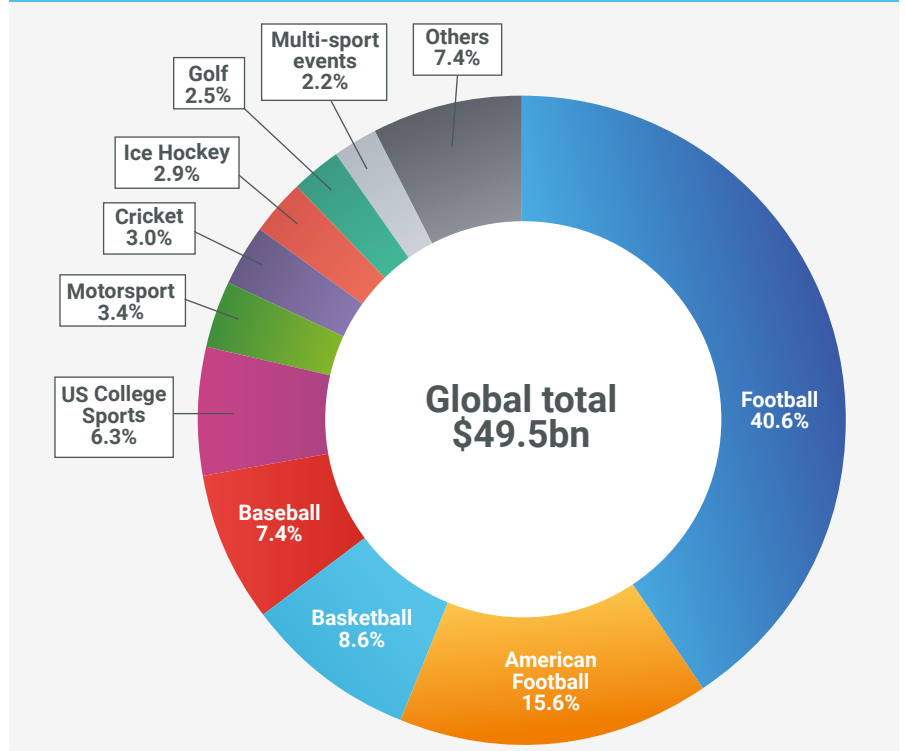
## Top 10 Sports

Football continued to dominate the sports media rights landscape in 2018, commanding 40% of total global sport media rights value.

Cricket was the big mover on our list of sports by media rights value, gaining three places to move from 10th to 7th, with the total spend on cricket media rights growing almost 50% from 2017 to 2018.

Basketball however is the only sport in the top 10 projected to achieve consistent double-digit CAGR growth over the longer term (2014-2021). This is driven by both domestic rights increases but especially by the NBA's continued success in selling its media rights internationally. The NBA achieves significantly greater returns from its international media rights than any other North American sport.

TOP 10 SPORTS' SHARE OF GLOBAL MEDIA RIGHTS VALUE 2018



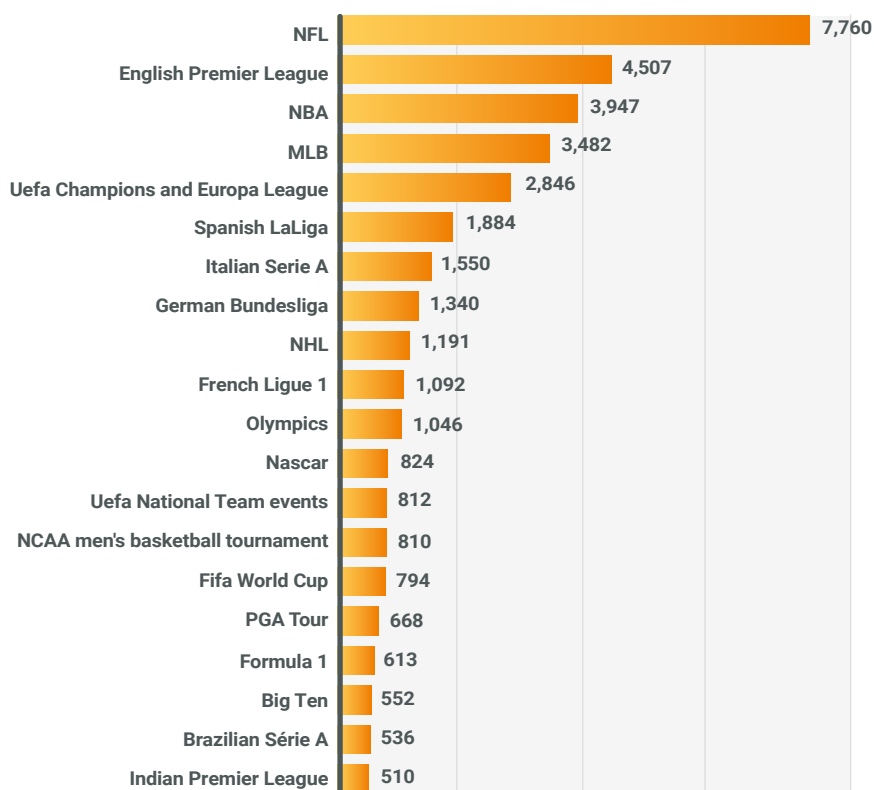
# Top 20 Properties

European football and the North American major leagues now account for all of the top 10 most valuable sports media rights properties. Since 2017, both the Bundesliga and Ligue 1 have leapfrogged the Olympics, to displace the latter from the top 10 for the first time.

The North American major leagues earn the vast majority of their media rights revenue domestically. By contrast, European football properties benefit from broad-based international fan interest and are earning an increasing percentage of their rights revenues offshore. In 2018 the Premier League earned some 38% of its revenue from international rights.

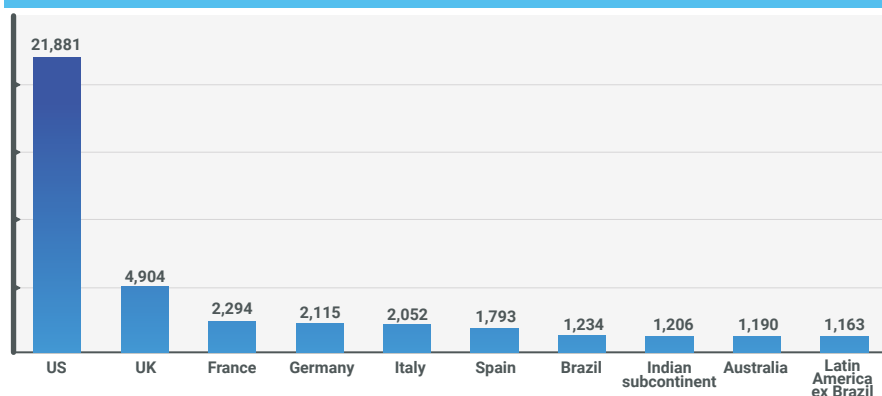
Growth in international revenues was likewise behind the Bundesliga moving past both the Olympics and NHL in 2018.

TOP 20 PROPERTIES BY GLOBAL MEDIA RIGHTS VALUE 2018 (\$M)



## Markets

TOP TEN MARKETS BY SPORTS MEDIA RIGHTS SPEND 2018 (\$M)



The US continues to dominate the landscape, dwarfing the rest of the market with more than 4 times the value of the next biggest market (the UK) and accounting for 44.2% of global sports media rights value. This percentage however represents a continued trend downward over recent years, with US market share now 2.4% lower than in 2016.

ITALY SPORTS MEDIA MARKET - KEY FACTS

2018 market value	\$2,052m
2018 market value per capita	\$34.63
Share of global market	4.1%
2017-18 growth	-4.8%
2014-21 CAGR	1.0%
Most valuable property	Italian Serie A (\$1,232m in 2018)
Most valuable property's share of market	60%

The most notable market story however is Italy, where the sports media rights market contracted by over \$100m in 2018 – a drop of almost 5% and the only market in our study to see total market value fall. As a result, Italy has fallen from third to fifth amongst our top 10 markets. [○](#)