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## Power and streaming platforms in sports: a structural analysis of DAZN as an online audiovisual creative industry

### *Poder y plataformas de streaming en el deporte: un análisis estructural de DAZN como industria creativa audiovisual en la Red*

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#### **Abstract**

The broadcasting of sports on the media has undergone important changes in recent years, especially when linked to the consolidation of new creative industries on the web such as streaming platforms. In addition to the success of OTTs such as Netflix, HBO or Amazon Prime Video, similar platforms specialising in high-demand sports content have emerged. This paper analyses the sports platform DAZN as an example of a creative audiovisual industry that has adapted to the demands of the internet era. To situate the case study, the context of the world's main sports streaming-platforms is presented. DAZN is then structurally analysed in relation to such variables as its parent company, shareholders, connections with socio-economic power, location, television rights and content, and relationship with other platforms. After applying the structural approach, the results show how DAZN maintains the mercantile dynamics of its relationship with other apparently competing media and with socio-economic power. It can be seen that this new creative industry maintains the same dependencies towards big capital, which absorbs it as it did previously with the traditional media system.

#### **Keywords**

Audiovisual; Creative industries; DAZN; streaming; Sports.

#### **Resumen**

La transmisión de deportes a través de los medios de comunicación ha experimentado importantes cambios en los últimos años, especialmente vinculados a la consolidación de nuevas industrias creativas en la red como las plataformas de streaming. Al éxito de las OTT como Netflix, HBO o Amazon Prime Video, se suma el surgimiento de plataformas similares especializadas en contenidos deportivos, de alta demanda. Este artículo analiza la plataforma deportiva DAZN como un ejemplo de industria creativa audiovisual que se ha adaptado a las exigencias de la era internet. Para situar el estudio de caso se dibuja el contexto de las principales plataformas de streaming deportivas en el mundo. Posteriormente, DAZN es analizada estructuralmente en diferentes variables como su matriz, accionistas, conexiones con el poder socioeconómico, localización, derechos televisivos y contenidos, así como su relación con otras plataformas. Los resultados muestran cómo DAZN mantiene las dinámicas mercantiles de relación con otros medios aparentemente competidores y con el poder socioeconómico. Se constata que esta nueva industria creativa mantiene las mismas dependencias con el gran capital, que la absorbe como ha hecho con el sistema mediático tradicional.

#### **Palabras clave**

Audiovisual; Deporte; DAZN; Industrias Creativas; streaming.

## 1. Introduction

The power of culture and creativity to create economic value has gained ground in academic debates and institutions from the end of the 1990's. The concept of creative industries originated in a post-industrial policy decision the British government took to promote development. The potential for economic growth by means of intangible production aroused the interest of multilateral organisations such as the United Nations Conference on Trade and Development (UNCTAD), the World Intellectual Property Organisation (OMPI) and the European Commission (EC) with its study *The Economy of Culture in Europe* (KEA, 2006). Each of these institutions have developed different classifications which alternate elements of cultural and creative industries. The list of creative sectors drawn up by the *Department for Digital, Culture, Medias & Sport (DCMS)* from the British government are; the Symbolic Texts Model; Concentric Circles Models; the World Intellectual Property Organisation (OMPI); the UNESCO Institute of Statistics Model; the Americans for the Arts Model (United Nations/PNUD/UNESCO, 2014).

According to UNCTAD (2008) the creative industries are made up of four categories: cultural heritage, arts, the media, and functional creations. Creative ideas arise at the heart of the creative arts such as music, literature and the visual arts (Throsby, 2001). Although there is nothing new about the relationship between culture, creativity and the economy, integrating this with new knowledge and technologies for creating value and wealth is new (Howkins, 2001; Florida, 2002). At the same time, they are related to the outlook in terms of politics, culture and the technology of the information society where innovation, communication and information technologies and the spread of the Internet has had a strong impact (Cunningham, 2011; Tremblay, 2011; Garnham, 2005).

In contrast, critics of this trend have emerged. Zallo (2009) questions the scientific validity of the concept of creative industries due to its lack of ideological consistency in comparison with the concept of cultural industries. In a similar vein, Miller (2009; 2012) goes beyond ideological considerations. He considers it to be inaccurate because economic power and innovation are directly related to art and the humanities, and this misleads one to believe that this is what makes money.

The extent of this concept for Bustamante (2018: 106) does not take into account the "political and social role of culture". The problem lies in the fact that when searching for economic performance, non cultural notions are added to that of culture.

However, the development of a high quality Internet has led to a surge in the establishment of new business models, while traditional cultural industries such as the audiovisual sector have been transformed. In this sector, television, one of the most successful traditional media, has had to adapt to the new status quo that has been changed by new agents such as mobile devices or *streaming services* (González-Neira, Quintas-Froufe and Gallardo-Camacho, 2020).

The appearance of platforms changed the way audiovisual content was consumed (Eguzkitza-Mestraitua, Casado-del-Río and Guimerá-i-Orts, 2023), thereby reducing consumption of traditional television. According to data from Kantar (2022) consumption of television in Spain went from 246 minutes a day in 2012 to 213 minutes in 2021. Although this data does not show a significant change, it does mean there is a trend which is changing the market for television. Also, according to the OCDE (2020) online content platforms were part of the creative industries which most grew during the Covid-19 pandemic, although the ones who most profited from this were the big players in the industry.

The rise of online content platform in Spain was marked in 2015 with the arrival of Netflix, which quickly reached 1.8% of households (CNMC, 2016), and 66% by 2022 (Galindo, 2022). Amazon Prime, Disney+ and HBO Max have also consolidated in the country as audience leaders. In this respect, García Leiva (2019: 90) stated that "audiovisual content provided on an OTT platform is now a consolidated segment, but one that is controlled by agents of transnational activity, with a global reach and of US origin". Several of these platforms are integrated into the large consortiums of world communication, whose headquarters are in the USA, which have occasionally been taken over by large telecommunications companies. This has occurred with an inertia in which corporate concentration has narrowed the chances of free competition, as with AT&T and Time Warner (Komissarov and Sánchez-Narvarte, 2019), which since 2022 has been WarnerBros. Discovery after the merger between WarnerMedia and Discovery.

One of the most significant audiovisual contents on television are the large sports events. In fact, there is a synergy between these creative industries and sport itself, which came to link culture and the economy as a new cultural industry which breaks from traditional ways of working (Galaraga and Aldaz, 2017). For these authors, sport has become an outstanding case study as the subject matter for analysis in the merger "between the chains of economic value and sociocultural value which characterises the current stage of capitalism" (p. 112). Football is, without doubt, symbolises this. The constant competition to have exclusive television rights for this sport has led to spiralling prices and the new technological agents of society in the 21st century have helped it to expand (García-Santamaría and Alcolea-Díaz,

2013; Alcolea-Díaz and García-Santamaría, 2019). With the “performance society” (Débord, 1997), of today, the media not only spread sports content, but also messages and ideals, so sport is inextricably linked to its projection in the media (Dantas and Leo, 2023). This situation led to protests from fans due to their loss of prominence to socioeconomic agents such as advertising, amongst others, supported by the media discourse (Requeijo, 2023).

Sólo LaLiga, the highest category of Spanish football, sold their television rights to Telefónica and DAZN for 4.95 billion euros for the five-year period between 2022 and 2027 (El Periódico, 2021). Also, the English Premier League sold their broadcasting rights for 11.6 billion euros, including overseas rights, for the period between 2022 and 2025 (Sport, 2021). However, these figures are a far cry from those found in American sport: the NFL sold their television rights for 110 billion dollars for the next eleven seasons (Palco23, 2021).

The rise in value of televisual rights have coincided with a period in which the media sector has undergone changes in terms of its consumption models. According to Alcolea-Díaz and García-Santamaría (2019), there is ever more interest in OTT platforms to compete for the audiovisual content of sports events. There are ever more specialized streaming platforms for sports events.

In short, due to the Internet and video streaming services, creative audiovisual industries have become involved in the markets for the broadcasting rights for sports events (Hutchins, Li and Rowe, 2019), which are particularly lucrative in football.

The aim is therefore to provide an in-depth analysis of this subject matter. This outlook stems partially from the Political Economy of Communication (EPC), which takes on not only a critical dimension, but also a transversal one, for the communication phenomena. Vincent Mosco (2006) defined Political Economy as the study of power relationships, which when applied to communication helps us understand how they are applied. Mosco (1998) states that above all the Political Economy of Communication aims to understand who does what to whom.

In the academic world, there is ever more production around streaming platforms as creative audiovisual industries from different perspectives, such as the proposals by González-Neira, Quintas-Froufe and Gallardo-Camacho (2020), who reflect on the challenges of measuring audiences in the media scenario where platforms are presented as new competitors. Eguzkitza-Mestraitua, Casado-del-Río and Guimerá-i-Orts (2023) analyse the communities created on the social networks around the Spanish streaming platforms which target a young audience. Izquierdo-Castillo and Latorre-Lázaro (2021) observe the employment structures on the platforms in Spain, to find out if they show a rise in female representation in a male-dominated sector. Also it looks at different works focused on describing and analysing their features, the trend and potential the streaming market has (Agustín-Lacruz and Gómez-Díaz, 2021; Sánchez-Gutiérrez and Oliveira, 2023; García Leiva, 2019; Heredia-Ruiz, 2017; Izquierdo-Castillo, 2015; Siri, 2016; Hutchins, Li and Rowe, 2019).

However, to date there has been little research on *streaming* platforms and sport. We should mention research by Alcolea-Díaz and García Santamaría (2019), which cover the football broadcasting rights in the new audiovisual arena where traditional television shares ground with streaming. Marín-Sanchiz, Valero-Pastor and Rojas-Torrijos (2022) carried out a case study on broadcasting the LaLiga Caster in Twitch, revealing there was a trend towards media convergence and a rise in the quality of journalism on this platform due to the use of formulas used in traditional media.

With DAZN, as it is a relatively new platform, there has been little research which covers it as the subject. In this respect, Callea (2021) analyses viewing of Italian football from pirate options to DAZN. Also, the interest this topic arouses can be observed if we bear in mind the number of university degrees or Master's theses there are, where all the potential the platform has is covered, from a potential broadcaster of electronic sports (Ventzke, 2020), how it burst onto the Spanish market (Jorge Sánchez, 2020) and a specific analysis of some of the competitions which are broadcast such as MotoGP (Onrubia, 2021) in addition to an analysis of its effects as the first *streaming* platform for broadcasting sports in Spain (Garcés Bravo, 2021).

In this context, this article sprung from the need to make an in-depth study on the new status quo for the creative audiovisual industries, the streaming platforms for sport. The first objective is to describe the case of the DAZN platform, the first streaming platform exclusively for sport in Spain. The second objective is knowing what relationships this company has with other agents or media companies. The purpose of this is to provide a description and analysis of the corporate structure of DAZN both in-house and in terms of its relationships and connections with other stakeholders in the socioeconomic and media system. The starting point for the hypothesis is DAZN apart from being an alternative media and means of sports broadcasting, is linked to the traditional media ecosystem and with the socioeconomic system.

## 2. Structural context of sports streaming platforms

### 2.1. Platforms linked to the large conglomerates

There are four large media conglomerates in the world: The Walt Disney Company, Comcast, Warner Bros. Discovery and Paramount Global. All are based in the USA, but have a presence worldwide. Apart from their assets in the communication industry, they have many other interests in other sectors. Several of these large conglomerates have adapted their traditional model of television to specialised streaming platforms to broadcast sports events.

This is what Warner Bros. Discovery does. This conglomerate has different specialised media for such sports contents such as the television channels Eurosport and the websites Goal.com and Bleacher Report. It is the former which owns Eurosport Player, an OTT platform which in Spain has a cluster of television rights for minority sports, especially tennis, cycling, snooker and also holds the rights for the Olympic Games. Half-way through the 2022/2023 season, it bought the rights for the French football league (League 1). The linear channel of Eurosport can be seen with the main premium television offers in Spain such as Movistar+, Vodafone and Orange.

The Walt Disney Company also owns one of the main media assets specialised in sports media, the ESPN broadcaster, which has a considerable presence in the United States and Latin America. In 2018 ESPN developed its own OTT, ESPN+, and ESPN Player, which was more orientated towards American university sports. In reality, ESPN is a partnership between two media corporations since The Walt Disney Company owns 80%, while the remaining 20% belongs to Hearst Communication. ESPN+ owns various television rights according to the region: LaLiga, Bundesliga, Championship League (second English division), the American leagues, the golf circuit, etc.

It is not the only OTT platform from The Walt Disney Company. It also owns Disney+ and Hulu TV Live, which among other things, offers contents from ESPN+. The company aims to join Disney+ and Hulu on the same platform (Rizzo, 2023).

DirecTV is linked to these large worldwide media conglomerates, which also have a streaming service for sports events by means of DirecTV Stream. With a special presence in the United States and Latin America, this OTT provides the main linear channels from American television such as ABC, NBC, Fox, CBS, etc., and covers over 30 regional channels. The content in Spanish has an important place, which has enabled it to access Fox Deportes, ESPN and Spanish channels such as Antena 3 or the A3 Series. Until 2023 it broadcast the NFL matches on Sundays.

DirecTV is owned by AT&T (70%) and TPG Capital (30%). The former is one of the main telecommunications companies in the world and owned WarnerMedia until it was merged with Discovery in 2022. TPG capital is an investment fund in the United States and owns a wide-ranging portfolio, which includes investments in companies such as Airbnb, Burger King, Fender, Lenovo, Life Time, McAfee, Seagate, Spotify, TATA, Uber and Vice, among other ones. Among these investments is the website Goal.com, from Warner Bros. Discovery, which owns, as we saw, the OTT platform Eurosport Player.

Although, on its own it does not constitute one of the large international conglomerates, BeIN Sports is one of the channels which is most established in the world of sport. It has its own streaming platform, BeIN Sports Connect. It is also linked to the Al Jazeera Media Network and is largely established in France and Latin America. Its parent company, BeIN Media Group, reaches the Middle East and Africa, France, the United States, Australia, Canada, New Zealand, Thailand, Indonesia, Singapore, Malaysia, Hong Kong and the Philippines. For the Latin American region, it holds the rights to the Champions League and the main competition in Conmebol (Copa Libertadores and Copa Sudamericana). It also holds the rights for LaLiga, Ligue 1 and the Africa Cup. BeIN Media Group goes beyond this. It is the consortium which owns Miramax studios, which bought The Walt Disney Company. It also owns Digiturk, a premium television operator in Turkey whose chairman is Nasser Al-Khelaifi, who is also chairman of Paris Saint-Germain. In both cases what they have in common are the economic elite and policies from Qatar, specifically Qatar Investments Authority.

### 2.2. New Platforms

The hegemony of these large media conglomerates has been broken by new world players for television rights with a pick and choose OTT platform model aimed at a new type of consumer. This is true, for example, with Amazon, whose platform Amazon Prime Video owns the rights to the second division of the Spanish football league, LaLiga Smartbank, at an additional subscription fee. Also, it enables subscription to other streaming platforms specialised in sports such as DAZN. In other countries it holds partial television rights for several competitions such as the NFL, UEFA Champions League, the Premier League, la Ligue 1 and the US Open for tennis. However, apart from that market share in live broadcasting of sports events, Amazon Prime Video has a catalogue of sports documentaries the most

outstanding of which is its series ‘All or nothing’, focused on several European clubs, the Brazilian team and the New Zealand rugby team.

YouTube has also driven their platform OTT, YouTube TV, which so far has broadcast sports events in the United States. Created in 2017, YouTube TV enables viewing of over 100 live channels, which includes the main American channels. It replaced DirecTV as the broadcasting platform for the NFL Sunday matches. It also has a special content plan in Spanish which targets the Spanish-speaking population in the United States (Ramírez, 2022).

They can remark on two other recent OTT platforms: FuboTV and Fanatiz. The former, FuboTV, came to Spain in 2019 although at that time it did not have its distinctive feature: providing live sports events. So far it has mainly focused on contents from Movistar Series, as well as other channels from TDT. With sport as the main business line, apart from the sale of sports rights, the upper echelons of FuboTV have been linked to club ownership. The CEO of the company, David Gandler, is the joint owner of París FC, while the platform FuboTV has received investment from John Textor, the owner of Eagle Holdings Football, a sports media conglomerate whose strategy is to own a variety of teams: it owns Crystal Palace, RWD Molenbeek, Botafogo and Olympique de Lyon.

In a similar vein is Fanatiz, a *streaming* platform which broadcasts several South American leagues, apart from the Turkish Superleague, Ligue 1 and the Portuguese league. It also owns the rights to South American handball and several Chilean sports competitions. Its growth has led to agreements with BeIN Sports and in Mexico with the telesales company Claro, from Carlos Slim (López, 2021), a shareholder from Grupo PRISA. *Fanatiz* has received investment funds from 777 Partners Holding, an investment fund owned by several football clubs such as Genoa FC, Vasco da Gama, Sevilla FC, Standard Liège, Melbourne Victory, Red Star FC and Hertha Berlín. In addition, it also owns the British basketball league, in which one of their teams, the London Lions, plays.

### 3. Methodology

The aim of this paper was to study the DAZN platform, a creative audiovisual industry on the Internet and the main streaming platform for sports content worldwide. In a similar vein to Yin (2018) we take a case study to be an empirical method which analyses a contemporary phenomenon in depth and within its real context, especially when the boundaries between phenomena and context may not be very clear. The analysis is carried out from a structural perspective, which enables researchers to observe the subject matter of the study from different perspectives which could have an effect on it (Reig, 2011). The structural method, according to Beltrán Pérez (2008), explains the subject matter, by taking one step further to delve into this topic, transcending an initial superficial layer. Likewise, the structural approach was used to observe all their connections, as an example of this adaptation of the media structure to a new age of communication. Both an inductive and deductive methodology are followed.

For this purpose, the categories by Moya López (2022; 2023) were followed in which there is a focus on the connections the media has with economic, political and historical power. To reach these, variables which adapted to this subject matter were added, and which can be seen on the table.

**Table 1. Definition of the analysis categories**

Analysis variables	Description
Parent company	Company the platform belongs to
Shareholders	Platform owners
Connections with socioeconomic power	Productive sectors it is linked to on account of its property
Location	Countries where the platform is present
Television rights and contents	Sports competitions for which it holds television rights, as well as other contents broadcast.
Relationship with other OTT platforms	Connections and agreements between the platform analysed and other similar ones

Source: Prepared by the author, 2023

Therefore, when analysing a streaming platform one not only has to focus on what contents or features it has, but also who it belongs to, what agreements it has with other platforms, in what context it is developed or what other productive industries does it have a relationship with. This way, the communicative ecosystem can be seen, which as defined by Gómez Mompert (2009: 105-106) encompasses "the media, subjects and circumstances" and how it is possible to observe the trend "in the communicative structure, communicative policy, the media field and communicative contexts".

Making a special emphasis on economic and media power surpassing that of the state reflects the consolidated context of a neoliberal market economy, in which the market is the main power. Ramonet (1998) established there were three powers in this order: economic, media and political, and it is clear they are often inter-related and often the boundaries between one area and another can seem blurred. In short, and as Almirón (2006) put it, the purpose of the structure of information is to discover the power relationships produced in the media systems, within them and with other structures.

Data was collected from the primary source. The DAZN corporate website was used as well as its parent company, Access Industries. The data collected corresponds to the information which appeared in June 2023. Meanwhile the references to the DAZN history cover the period 2015-2023. Also, to contrast, confirm and refute official information, secondary sources were used. Here they concern a hemerography or webgraphy, which store important information about the subject matter of the study.

#### **4. Results**

DAZN is a platform created in 2015 que which first appeared in Austria, Germany, Japan and Switzerland. The platform initially focused on contact sports. Straight afterwards the acquisition of television rights for important sports competitions, as well as Formula 1 and the Premier League, were responsible for this platform expanding and becoming successful. As a result, by 2020 they had expanded to over 200 countries.

It reached Spain in 2019 with a free subscription offer for the first month. Thereafter one could continue subscribing by paying a monthly fee of 4.99 euros. At present there are three different subscription plans. The Victoria plan for 9.99 euros which includes women's football and original documentaries, the Esencial plan for 12.99 euros with Formula 1, MotoGP, Premier League, Euroleague, original programmes and documentaries, and the Total plan for 29.99 euros which includes the entire content.

The platform also enables one to connect to two devices simultaneously provided they are connected to the same point of access to the Internet. The considerable rise in subscription fees can be justified, according to DAZN executives, due to the amount of contents and large events which have been added to the platform (Valero, 2019).

#### **4.1 Results by variables**

##### **4.1.1 Parent company**

The DAZN parent company is the American company Access Industries. In reality it is a conglomerate which operates in different productive sectors. The portfolio of Access Industries is as follows:

- Media and telecommunications: Here we can find DAZN along with the film producer AI Film, Deezer the musical streaming platform and the record company Warner Music Group.
- Natural resources and chemistry: In the same line it owns the American electrical company Calpine, Clal Industries, the platform for Israeli industrial investment, and the French Chemicals company LyondelBasell.
- Investment and technology: It owns a technology investment company called Access Technologies.
- Property: It owns Access Real Estate, its operative in the property market and is present in New York, Miami, Los Angeles, Denver, Uruguay, France and the Bahamas.
- Entertainment: It owns Access Entertainment, managed by Danny Cohen, the former director of the BBC. Through this company it has also invested in the theatre and owns the Theatre Royal Haymarket in London.
- Biotechnology: Here it includes Access Biotechnology, with which it operates in the sector.

**Table 2. Portfolio of companies from Access Industries**

Access Industries	
<b>Media and telecommunications</b>	DAZN Deezer Warner Music Group Al Films
<b>Natural resources and chemistry</b>	Calpine Clal industries Lyondbasell
<b>Investment and technology:</b>	Access Technologies Ventures
<b>Property</b>	Access Real Estate
<b>Entertainment:</b>	Access Entertainment
<b>Biotechnology:</b>	Access Biotechnology

Source: Created by the author from the data from Access Industries.

Therefore, DAZN is another line of business, included in the portfolio of media and telecommunications from Access Industries, with which the platform is part of a far more complex and diverse industrial fabric. It is a clear example of the presence of sectors outside communication (Reig, 2011), one of the most studied topics within the area of the Political Economy of Communication.

#### 4.1.2 Shareholders

The main shareholder of DAZN is the parent company, Access Industries, which belongs to Len Blavatnik (Forbes, s.f.), a magnate who was born in Soviet Ukraine, grew up in Moscow, and now lives in London. He made his fortune after selling his share of the Russian oil company TNK to British Petroleum. Blavatnik, who in terms of politics made donations to Barack Obama, Mitt Romney and Donald Trump, was director of UC Rusal between 2007 and 2016, the largest producer of aluminium worldwide, owned by Roman Abramovich (elEconomista.es, 2022), a Russian magnate who also owned Chelsea up until 2022. According to Bloomberg, on 25th June 2023, Blavatnik ranked number 36 on the list of the richest people in the world (Bloomberg, s.f.).

The second largest shareholder for DAZN is Dentsu (Rodríguez, 2022), one of the most important advertising agencies in the world, which was originally in Japan.

#### 4.1.3 Connections with socioeconomic power

According to the corporate organization DAZN has, there are various connections with socioeconomic power. Firstly, DAZN reaches a wide range of very productive sectors, some of which are outside the communication sector: electrical companies, chemical companies, industrial investment platforms, technology, property, biotechnology and the culture sector too. Access Technologies, the investment branch in technology from the parent company of DAZN, invests in large companies such as Alibaba Group, Amazon, Beats, Facebook, Snapchat, OpenDoor, Digital Ocean, Spotify, Tencent, Square, Tango, Zalando and Yelp.

#### 4.1.4 Location

DAZN was created in 2015 and at present operates in Germany, Austria, Canada, Spain, the United States, Japan, Italy and Switzerland. According to DAZN itself, the platform is market leader in Italy, Spain, Germany and Japan, and has 20 million subscribers worldwide (DAZN, s.f.). It is also in Brazil, where it actually broadcasts a lower category such as C Series.

In Spain DAZN works with a monthly subscription fee which varies according to the sports chosen. The full package is offered at 29.99€ (June 2023).

Image 1: DAZN subscription plans.



Source: DAZN.com

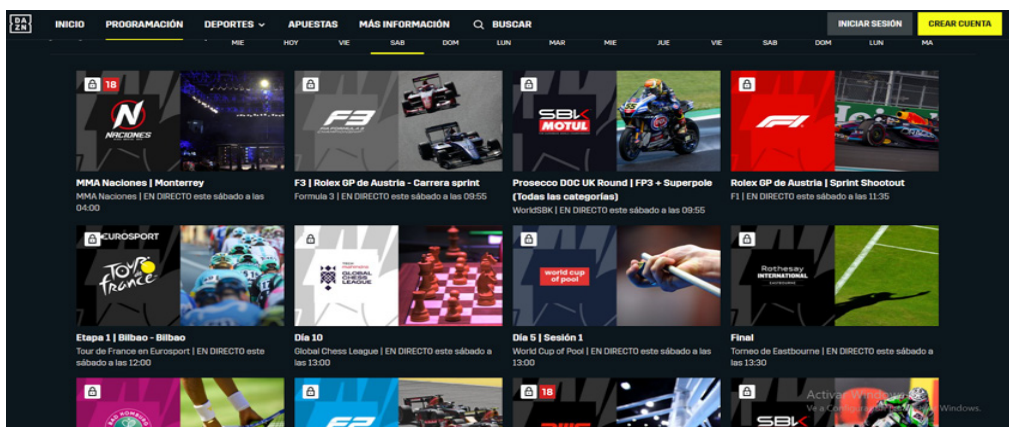
#### 4.1.5 Television rights and contents

In Spain DAZN has the television rights for football competitions such as the Premier League, LaLiga (partially) and the women's Champions League, motor racing such as Formula 1 or MotoGP, basketball competitions such as Euroleague or sports events organised by Matchroom (darts, snooker, boxing, etcetera). Events such as football, basketball or racing have extensive coverage both before and after the race itself. Its schedule is highly focused on broadcasting live sports events.

Apart from that it also provides original documentaries, the so called DAZN Originals, some of which are about sports personalities such as Ronaldo Nazario, Diego Armando Maradona, topics such as the Cameroon football team in the 1990 World Cup or about historical boxing fights as the one in 2019 between Andy Ruiz Jr. and Anthony Joshua. The latter was coproduced with Balboa Productions, the audiovisual producer of Sylvester Stallone. All of this is produced by DAZN Studios, the producer created by the platform in 2022 (Palco23, 2022).

However, in association with other sports platforms and channels, their list of sports broadcasting has risen.

Image 2: The DAZN schedule on the DAZN website platform



Source: DAZN.com

#### 4.1.6 Agreements with other OTT platforms

DAZN provides sports competitions which it does not have the television rights for, but does so after entering into partnerships with other platforms. For example, it broadcasts contents from Eurosport, which enables it to broadcast the French football league (Ligue 1) or the main cycling competitions



(Giro d'Italia/Tour of Italy, Tour de France/Tour of France and Vuelta a España/Tour of Spain), and other racing competitions such as the 24 hours Le Mans race. It also provides access to Red Bull TV, which belongs to the media branch of Red Bull (Red Bull Media).

Television rights for LaLiga are shared with Movistar, premium television as there is the option to subscribe to a special supplement which includes DAZN (Movistar, s.f.). This situation can also be seen with Amazon Prime Video, a platform from where one can subscribe to DAZN (Palco23, 2023b).

Likewise, DAZN has a linear channel within the premium channel Sky in Italy. Together they have an agreement which enables it to broadcast the Champions League in Germany (DAZN, s.f.).

#### **4.2 Results of applying the structural approach to DAZN**

DAZN is one of the leading OTT platforms specialised in sports contents. In the financial year 2021, it tripled its turnover and reached 1.3 million euros (Palco23, 2023a), although the large investments made by buying the sports rights raised debt which the main owner had to recapitalise (García Roperó, 2022). As a result of the success of DAZN it diversified its brand towards other markets. In 2021 it created DAZN Bet, its own betting house in association with the Gibraltar company Pragmatic Group (2playbook, 2022). Part of the recent success of the platform was due to Kevin Mayer, CEO of the company until 2023, who came from other large corporations such as The Walt Disney Company and rising stars on the social networks such as Tik Tok (Palco23, 2023).

If the structural approach is applied from the critical premises of Political Economy of Communication (Reig, 2011; Mosco, 1998; Almirón, 2006; Beltrán Pérez, 2008), the results show a deeper layer in which there are a range of interrelationships between economic media, and even political power.

Firstly, DAZN is just a branch of the business within a complex economic conglomerate which encompasses a range of productive industries such as Access Industries, most of which are outside the field of communication. This leads to the OTT platform as it interacts with the commercial interests of its parent company, which owns other booming businesses within the cultural industries such as the record company Warner Music Group and the Deezer platform. Warner Music Group owns the music video platform VEVO as well as its competitors Universal Music Group (Vivendi), Sony Music, Google (Alphabet) and Abu Dhabi Media, which belongs to Abu Dhabi United Group (the majority shareholder for the largest sports conglomerate in the world: City Football Group). Warner Music Group is listed on the New York stock exchange. There its institutional shareholders are FMR, Sands Capital, The Vanguard Group, Caledonia Investments and BlackRock, among others (Yahoo! Finance, s.f.).

One can also see links to the entertainment industry. Access Industries has invested (through Access Entertainment along with Warner Bros) in films such as Wonder Woman, It, Gravity, Birdman, Godzilla, Mad Max: Fury Road, Dunkerque, Ready Player One and almost 80 other films. This, therefore, is a union with one of the main filmmaking studios in the world, which in turn belongs to one of the four world media conglomerates, Warner Bros.Discovery, which owns other sports streaming platforms such as Eurosport Player, where DAZN broadcasts contents due to an agreement that has been extended until 2026 (Europa Press, 2023). Also, Warner Bros.Discovery is linked to the Mexican Grupo Televisa through David Zaslav, CEO of the former and director of the latter (Warner Bros. Discovery, s.f.). Moreover, Grupo Televisa, apart from its media activity owns Club América de México and the Azteca stadium.

Also, other important connections from Access Industries are those derived from its technological investment company Access Technologies. Some of its investments have been on platforms such as Alibaba Group, Amazon, Beats, Facebook, Snapchat, OpenDoor, Digital Ocean, Spotify, Tencent, Square, Tango, Zalando and Yelp. These concerns market operations which can be interpreted from the structural approach. Firstly, Access Technologies invests in Spotify, while Access Industries also owns Deezer, with which it has economic interests in two of the main music streaming platforms.

Also, the investments in Amazon and Facebook mean the parent company of DAZN (Access Industries) shares institutional shareholders, as among the Amazon shareholders are The Vanguard Group, BlackRock and FMR, which are also present in Meta (parent company of Facebook), and in Warner Bros. Discovery and in Comcast, which Access Industries has different connections to (DAZN has a linear channel in Sky, with which it has agreed some television rights in Italy and Germany)<sup>[1]</sup>. These are the same institutional shareholders as in Warner Music Group, which are owned by Access Industries. The same situation can be observed with Alphabet, the company with which Google is listed on the stock market, which owns shares together with Warner Music Group, with which it shares VEVO, as stated before.

All these kind of connections have a clear impact on DAZN which is part of the entire complex web structure which comes from the parent company. WarnerBros.Discovery and Amazon are strategic

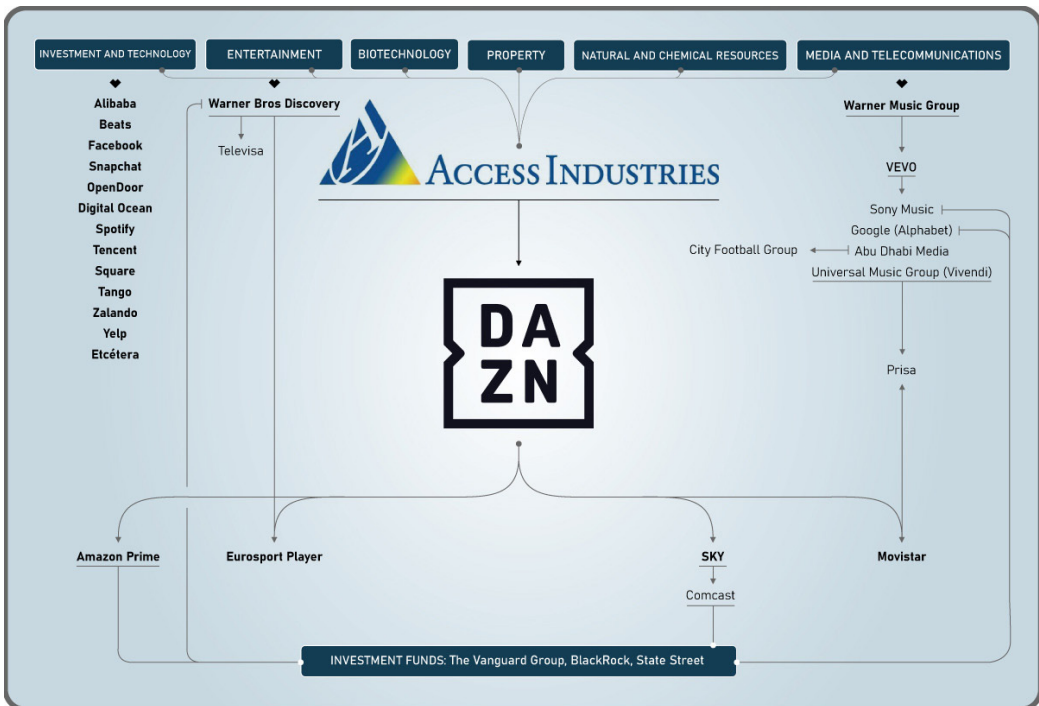
partners of Access Industries in their businesses. This enables DAZN to benefit from these synergies and one service it provides is to broadcast Eurosport contents (WarnerBros.Discovery) and can be subscribed to by means of Amazon Prime Video (Amazon). Therefore, DAZN enters into interaction, synergies and partnerships with other large competitors.

The Movistar agreements also mean there are certain links with other large conglomerates. Movistar is owned by Telefónica, which, in turn, is a shareholder of Grupo PRISA, a Spanish media conglomerate which has been established in Europe to a certain extent (Vivendi is a shareholder of PRISA) and in Latin America. One of the Telefónica shareholders is BlackRock, an American investment fund which as stated, also invests in Sony, with interests shared with the Warner Music Group in VEVO. The main PRISA shareholder is Amber Capital, a British investment fund, with direct interests in the world of sport, and owns three football teams: Racing Club de Lens, Millonarios Fútbol Club and AC Padova.

With DAZN the opposite pathway is shown to the platforms seen previously in section 2. If traditional television has adapted and created its own streaming platforms for sports contents, with DAZN this has also veered towards traditional media. Therefore, DAZN owns a linear channel (DAZN 1 HD) which is broadcast within cable Sky television, owned by Comcast, another of the four large media conglomerates, with which they had already reached agreements on launching DAZN in Italy and agreed to broadcast the men’s Champions League in Germany.

As for what it owns, Access Industries, the parent company of DAZN, belongs to Len Blavatnik, and has one of the largest fortunes in the world, which places DAZN not just within a complex and diverse corporate conglomerate, but in the orbit of a figure who belongs to the business élite. Moreover, as part of the economic elite, they have also given donations to famous personalities in politics such as Barack Obama and Donald Trump. Blavatnik also has links to the Russian oligarchy as a shareholder in the oil company TNK (he sold his shares to the British company British Petroleum) and directed UC Rusal, an aluminium producer owned by another Russian magnate, Roman Abramovich, linked to the world of sport through his role as owner of the English football club Chelsea FC until 2022. Therefore, DAZN enjoys the investment funds from a strong corporate figure.

Image 3: Structural relationship of DAZN



Source: Produced by the author

## 5. Discussion and conclusions.

Sports streaming platforms open a new world for creative audiovisual industries, driven by the continuous advance of the Internet and tools for consuming online content. Classified as one of the creative and

cultural sectors, sport is the main booming product from these audiovisual industries. The production of intangibles, in this case, sports content, is one of the main sources of income from this industry, which arouses the interest of different players in the traditional economic sector. The case of DAZN, is a salient example of the spread of sports content, since it was the first to specialise exclusively in this type of contents in several countries. Moreover, it also is if we analyse its structural relationships.

Therefore, OTT platforms specialised in sports content are a fundamental part of the current media ecosystem. Today these platforms coexist with premium television, and have consolidated in the 21st century, as the main method of spreading sports content, just as set out by Hutchins, Li and Rowe (2019). Within these OTT platforms, DAZN has managed to carve itself a niche in the specialised market for broadcasting sports contents. Just as what happens on OTT platforms which have consolidated in the world (Netflix, HBO, Hulu, Disney+ Amazon Prime Video), DAZN also has an American parent company, with which it can transcend frontiers. Thus, it expanded abroad from the United States and by means of these platforms has beaten the competition by cornering the market for broadcasting sports events abroad.

Bearing in mind our aim was to know about all the relationships DAZN has with other players in the media and socioeconomic system, through the structural approach it can be shown that this platform is one more branch of the business within a large conglomerate like Access Industries. Here, apart from the creative industries on the network, such as DAZN itself or the music platform Deezer, there are traditional players from the cultural industries, such as the record company, Warner Music Group. That is, DAZN lies within a corporate structure which is far more complex and makes it a company of interest linked to other corporate strategies, since it invests in other large platforms such as Amazon or Spotify, to mention a few of them. This structural analysis reveals how important it is to consider the wider corporate context in which DAZN operates and suggests its operations are interconnected with a wide range of media and corporate institutions.

Despite being a creative and original industry in its origin and format, DAZN is not ground-breaking vis-à-vis the traditional media ecosystem. It has a similar presence to that enjoyed by traditional media which are incorporated into large media conglomerates which, in turn, make partnerships with other productive sectors in the economy. Therefore, one conclusion that can be drawn is DAZN is closely linked to worldwide socioeconomic power due to its corporate connections. This is something that corroborates the idea of García Leiva (2019) that the OTT are a segment that is being consolidated, but controlled by transnational stakeholders whose reach is global and are of American origin.

This, in reality, is the market. Sport, in tandem with the concept of creative industries from the end of the 1990's has yielded part of its traditional contribution to culture to market forces. Therefore, huge changes have occurred in recent years: changing the schedules for events, fragmentation of channels where one can see broadcasts, sponsorship reflected on t-shirts, names of the competition and studio names. The latter have become spaces which are more focused on making money than on sports. For this reason, the broadcasting discourse and the sense of spectacle the media contribute to the industry is fundamental. The media silence around these changes (Requeijo, 2023), which has turned an important cultural asset that is sport into what is essentially a commodity, discourages the media from adopting a critical attitude towards the market economy. It is no wonder: these OTT platforms which occasionally arise as new players in traditional television chains in charge of broadcasting, are largely dependant on large influxes of capital. As a result, this commercialisation of sport tends to be passively accepted.

Within these commercial strategies, unlike the paradigm of liberal economic theories, there is no market competition, but rather the large economic agents cooperate among themselves. Regarding DAZN, it could be directly or indirectly affected. Indirectly because Access Industries owns Warner Music Group, which shares viewing platforms with their main competitors. Moreover, apart from integrating Deezer into its parent company, it invests in platforms which in theory are rivals, such as Spotify. However, directly speaking, apart from the OTT platform in itself, one can reach DAZN by means of its competitors. Both on Movistar+ and on Amazon Prime Video, which provides other types of sports contents, one can subscribe to DAZN by paying a special supplement. Bearing in mind the structural relationships there are between different platforms in section 4.2, this segmentation in which sports rights are located is not entirely detrimental to the interests of the owners, since the collaboration among them enables them to maintain a good position regardless of what options they choose. In a struggle for the fragmented market, there is a risk that viewing sport becomes linked to an oligopoly in which two or three platforms concentrate all the rights of sports broadcasting in a partnership-

As a creative industry, the original element of DAZN is knowing how to integrate such a popular and massive phenomenon as sport, especially with football, with the innovation and technologies to create wealth as stated by Howkins (2001) and Florida (2002). In this respect, our initial proposal was to find out if DAZN showed a trend in traditional television or conversely, whether it would replace it. Bearing in mind

the structural relationships and connections (media, financial...) with DAZN it can be concluded that the platform is a fundamental part of the current media ecosystem since it coexists with other platforms for broadcasting content on streaming, as well as premium television, which was already consolidated at the start of the 21st century as leaders in broadcasting sports events.

There has also been a convergence in models, which in some cases is tantamount to hybridisation. The large media conglomerates have evolved their sports contents from linear channels (which they maintain) to specialised OTT platforms, for example, The Walt Disney Company with ESPN+ Warner Bros. Discovery with Eurosport Player. This shows a natural evolution which captures traditional audiences with new consumption of sports events. In the case of OTT platforms which were created for this purpose, it can be seen that DAZN also took the opposite route. Although its strong point is the platform, which is the product it mainly sells in the countries it operates in, it has also made the leap to linear channels, as it did in Italy in cooperation with Sky, which belongs to the world media conglomerate Comcast.

Also new rapprochements within the creative industries linked to sport can be seen. In some cases, the owners of sports clubs are the ones who also own the OTT platforms for broadcasting sports events. Therefore, Fanatiz represents an investment from 777 Partners Holding, an American investment fund which owns seven football clubs in as many countries and owns a basketball competition in which one of its team plays. The same occurs with FuboTV, which received investment from Facebook Group, from John Textor, an American businessman linked to the production of special effects for Hollywood and who owns another four football clubs in as many countries. In this way, there is a paradox or conflict of interests because the judge and defendant may sometimes be the same stakeholder. Thus, from a critical perspective, one might ask how critical can the media be when they have direct interests in some of the competitors of the competition it is broadcasting?

What is evident is the neoliberal strategy and logic of controlling as many stakeholders in the industry as possible, from the productive sector. Therefore, sport is controlled by the economic elites which own the media itself by which this content is broadcast to the masses. It boils down to an industry in which the economic interests of such elites hardly matter. The social value of sport, the general public are relegated to mere spectators, which can be compared to public participation on different levels, such as liberal democracy and the few opportunities of participating in it, and their vulnerability to market forces.

Therefore, in terms of relating to the power structure, DAZN is a stakeholder within the new creative industries which has not broken away from the typical synergies and cannot be established as an alternative model of communication on the basis of its property and organisational layout. What has changed is the viewing formats, the means of consumption and even the way in which content is broadcast (in Spain DAZN coverage follows an American model based on extensive coverage before and after matches, with a great deal of graphs and many precise data), but not links to socioeconomic power. By means of DAZN one can reach the large world investment funds such as The Vanguard Group, BlackRock and State Street Corporation, which are the main investors not just from the large multinational media conglomerates (Disney, Comcast and Warner Bros, which have their own OTT sports platforms), but the main multinationals. Therefore, our starting hypothesis has been confirmed which established that DAZN symbolised an alternative media and means of broadcasting sport, but not in terms of relationships with the traditional media ecosystem, whether this is directly with other media or through its links with socioeconomic power. Therefore, these new creative industries have likewise been dominated by the large economic multinationals, which have neutralised the cultural value of a social and popular industry such as sport.

## 7. Contributions

<b>Contributions</b>	<b>Author</b>
<b>Conception and study design</b>	1, 2
<b>Search for documents</b>	1, 2
<b>Data collection</b>	1
<b>Analysis and critical interpretation of data</b>	1, 2, 3
<b>Review and approval of versions</b>	2, 3

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## 10. Declaration of conflict of interests

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#### **Notes**

1. All data concerning shareholding for these conglomerates can be consulted in the Yahoo! Finance database in each of its profiles: <https://finance.yahoo.com/>