

Getting amongst it

Monetising sports and entertainment

GSMAi @ Sports and Entertainment Summit

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AUTHOR

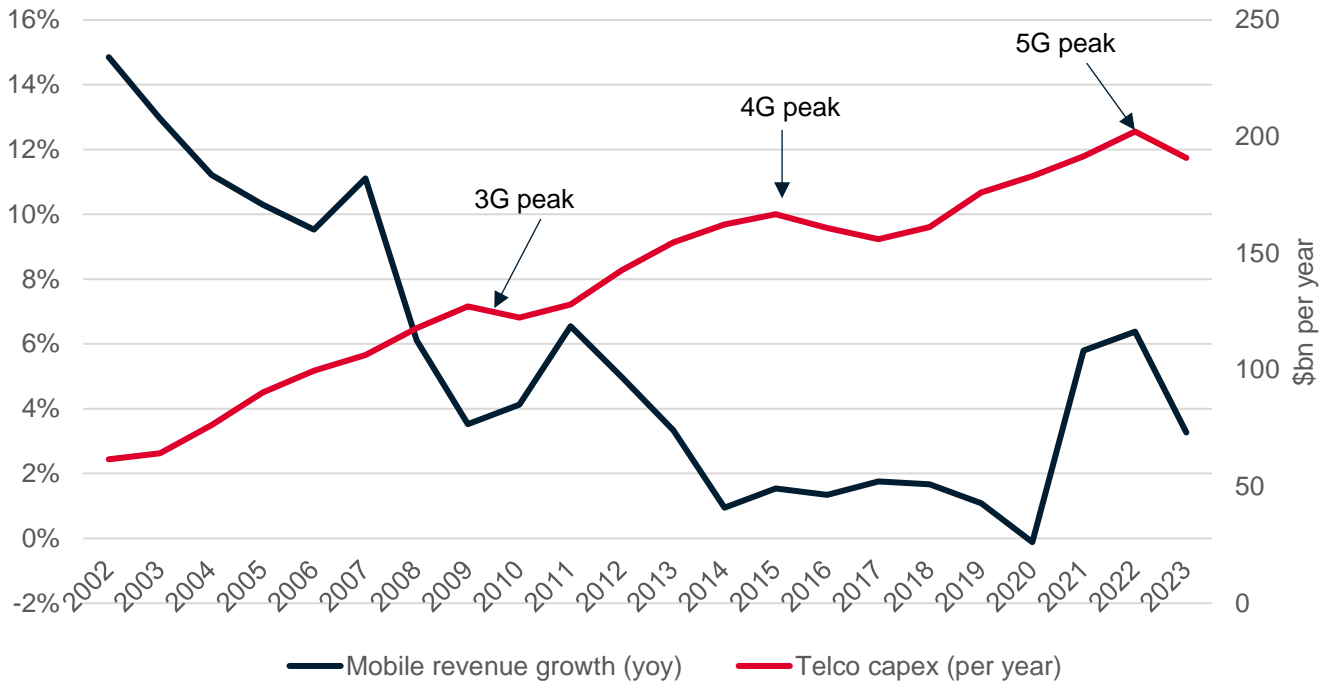
Tim Hatt

Head of Research and Consulting, GSMA Intelligence

The long term growth challenge

5G RoI has never been more pressing

Despite generational cycles of network investment, telco revenue growth has struggled to get beyond low single digits since the 3G era

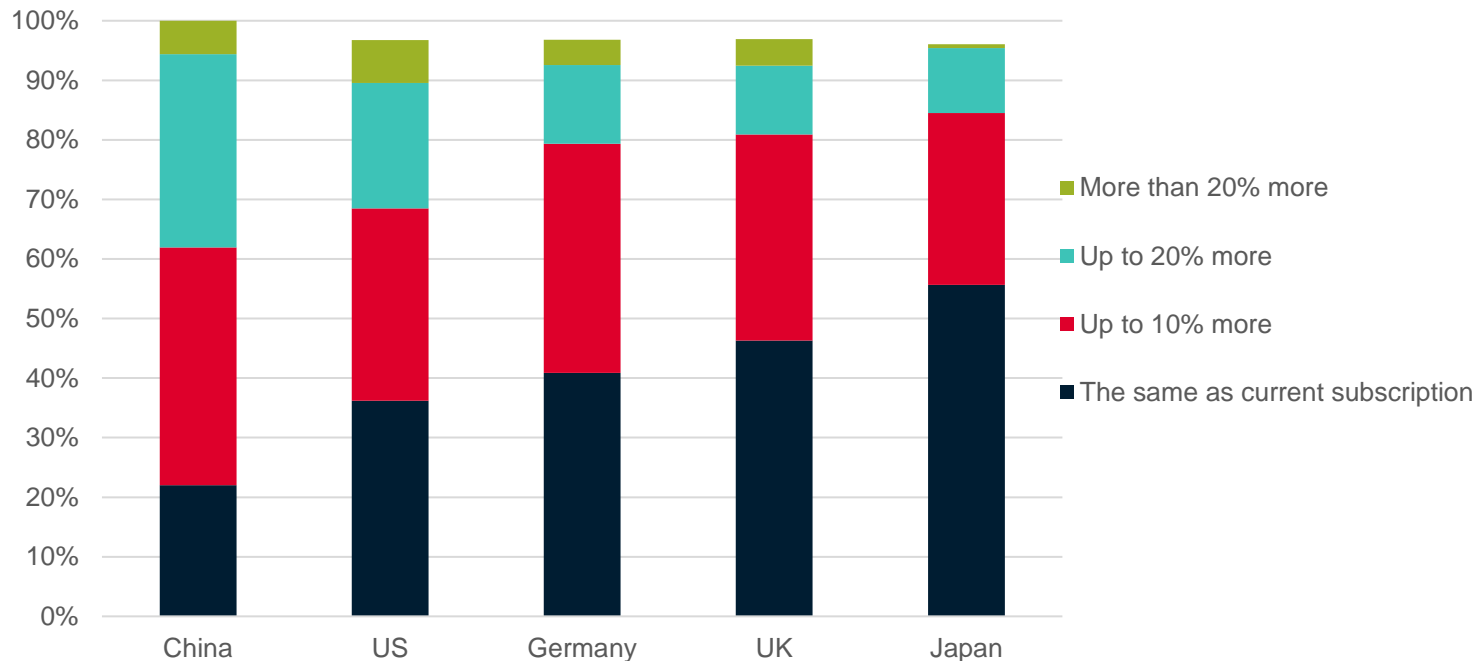


Source: GSMA Intelligence

How to drive sustainable 5G premiums?

Temporary vs. permanent uplifts

Consumer willingness to pay for 5G (or not)

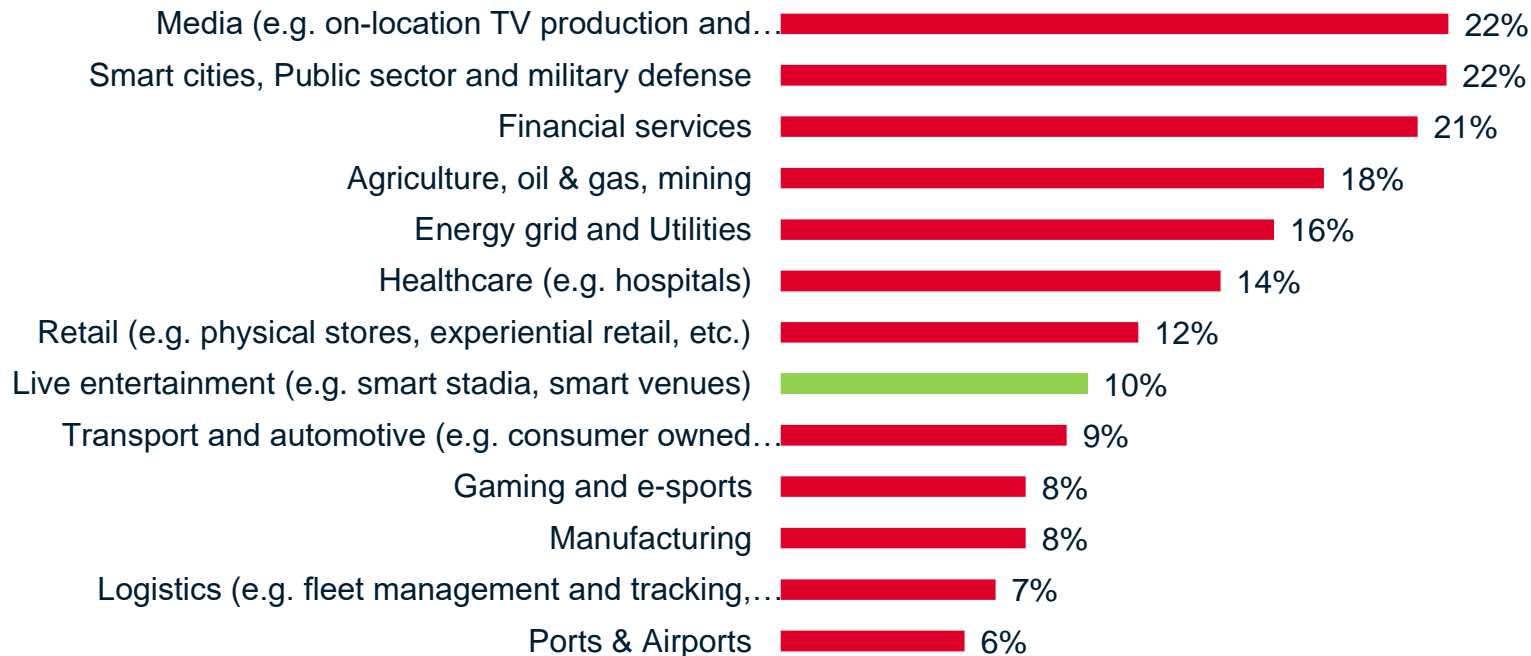


Source: GSMA Intelligence

Can private 5G help?

10% see entertainment venues as a top 3 sector (but this is early days)

Telco views of the top industries for private wireless



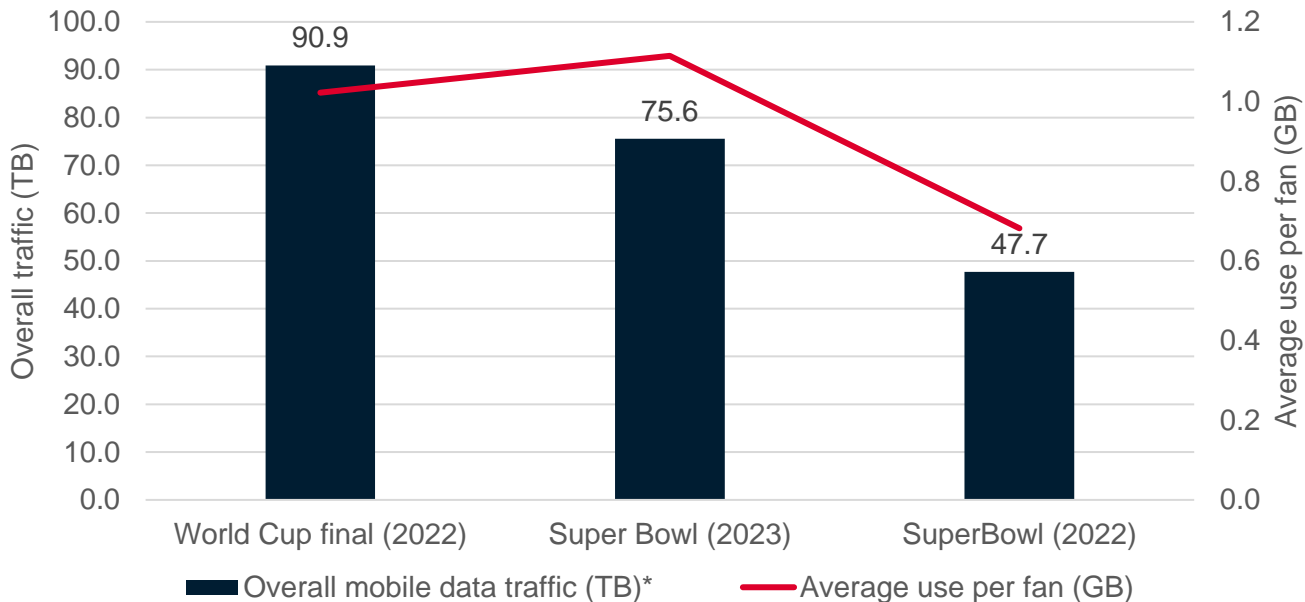
Respondents were asked to pick the top 1, the top 2 and the top 3 respectively.

Chart shows the overall weighted scores, calculated as Ranked 1st * 1.00 + Ranked 2nd * 0.66 + Ranked 3rd * 0.33.

Source: GSMA Intelligence

In action: Qatar World Cup (2022)

The Qatar World Cup grossed even higher than the Super Bowl



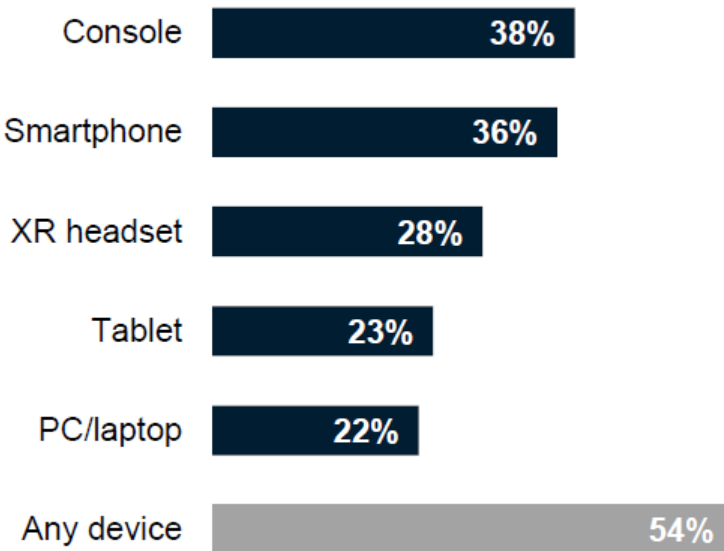
- Infra set up
 - 5G macro + small cells
 - Local datacentres
- AR (e.g. player info and stats)
- Fan zones

*Traffic figures are cellular data only, and exclude WiFi. Data includes traffic for multiple mobile operators servicing a given event. For the World Cup in Qatar, this includes Ooredoo and Vodafone, while for the Super Bowl it includes Verizon, AT&T and T-Mobile
Source: GSMA Intelligence based on company disclosures

In action: e-sports and live gaming

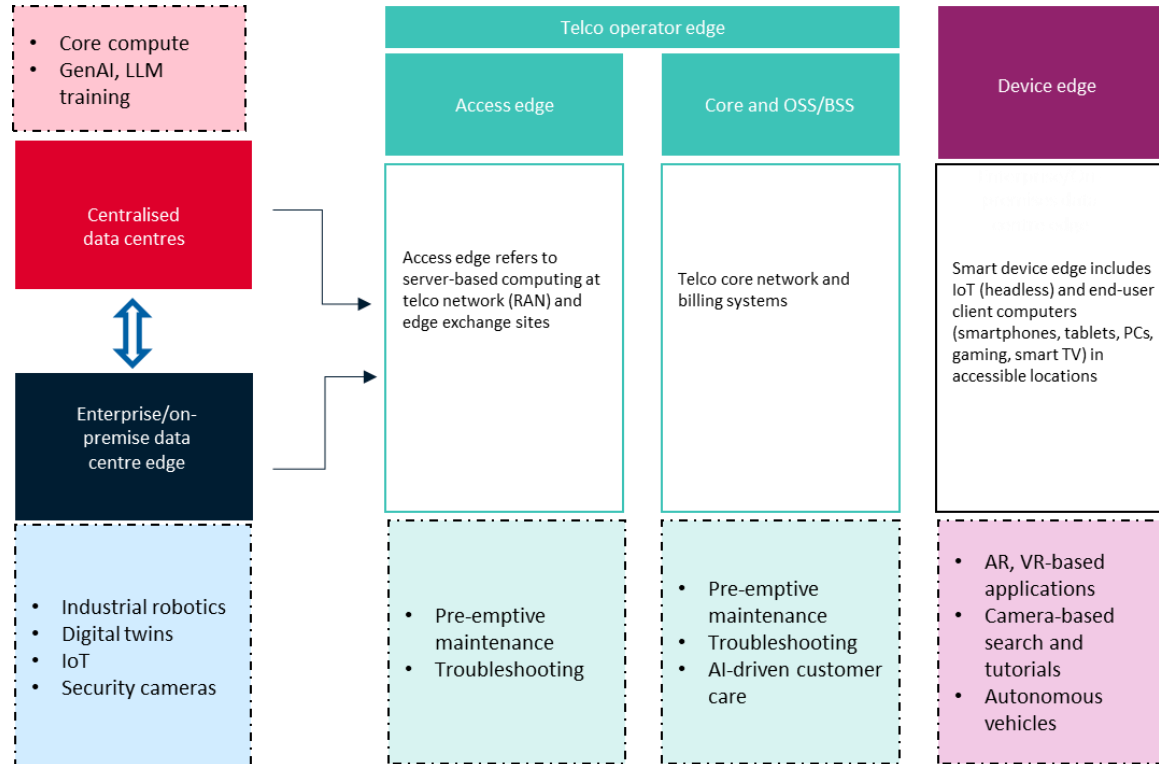
Gaming affinity (% who play at least once per week) *Europe view*

- Growing phenomenon
- Network effects
- Multiple revenue models (e.g. direct charging at events, leased capacity, bundles)
- Many telcos now involved (e.g. Vodafone, Zain, Telkom Indonesia, True)



AI is now lighting up the edge...where venues reside

Stadiums and entertainment venues are prime candidates for edge

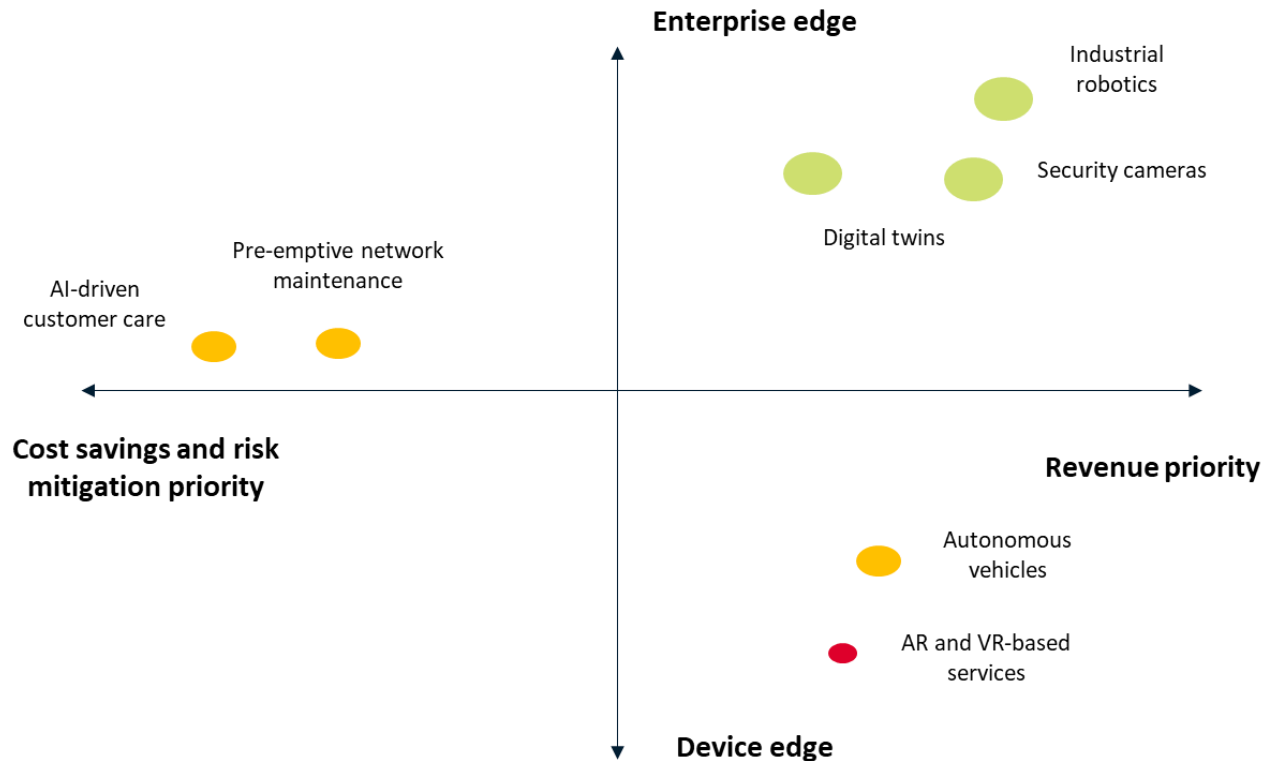


Source: GSMA Intelligence

Making tech vs. making money

Eyes on the prize

- North star = new revenue
- Infra vs. services
- Partnerships



Source: GSMA Intelligence

GSMA Intelligence

Who are we? What do we know?

GSMA Intelligence is the definitive source of mobile industry insights, forecasts, and research, used around the world. Our insights cover every mobile operator, network, and MVNO in every country worldwide.

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EVENT
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Operators



Regulatory
Bodies



Government
Departments



Financial
Corporations



Cybersecurity
Firms



OEMs and
Manufacturers



Technology
Companies



Consulting
Businesses



BY THE
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7/10

of Forbes' Top digital
companies worldwide, rely on
our data and insights

50m+

individual datapoints covering
everything from operational to
economic

4,600+

networks tracked, spanning
every country

9/10

of the top Telecoms in the world
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Thank you!

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