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Citation: Chalaby, J. K. (2026). Streaming sport: Platform power and the reconfiguration of the media-sport nexus. Convergence: the international journal of research into new media technologies, 13548565261469964. doi: 10.1177/13548565261469964

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Link to published version: https://doi.org/10.1177/13548565261469964

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Research article

CONVERGENCE

Convergence: The International Journal of Research into New Media Technologies
2026, Vol. 0(0) 1–17
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DOI: 10.1177/13548565261469964
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Streaming sport: Platform power and the reconfiguration of the media-sport nexus

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Abstract

This article examines the growing involvement of global streaming platforms – Amazon Prime Video, Apple TV+, Netflix and YouTube – in the sports media landscape. While these actors have made significant inroads into live sport since 2022, the article argues that it is unlikely to become central to their business model in the way it was for pay-television providers. Drawing on platform theory, the study situates streaming services within the broader dynamics of the platform economy, emphasising the role of scale and transnational network effects in shaping content strategies. Through an analysis of recent rights acquisitions, the article demonstrates that global streamers adopt a selective approach to live sport, targeting packages that align with their brand identities and broader entertainment objectives rather than pursuing comprehensive rights portfolios. The territorial fragmentation of sports rights and the limited cross-border travelability of live sport further constrain its value for transnational platforms. These structural constraints are illustrated by the case of DAZN, whose territorially fragmented rights portfolio prevents the generation of transnational network effects, limiting its ability to scale globally and compete locally. At the same time, streaming platforms play an increasingly important role as strategic partners for sports leagues. Their global reach, technological capabilities and appeal to younger audiences make them central to leagues' digital-first strategies. In particular, the article highlights the emergence of a new sports storytelling ecosystem, in which documentary series connect human-interest narratives with live competition. The article concludes that, while streaming platforms do not displace traditional broadcasters, they nonetheless reconfigure the balance of power in the media-sport nexus, shifting advantage away from rights owners.

Keywords

streaming platforms, sports media, media–sport nexus, platform economy, platform theory, live sports rights, sports broadcasting, digital media industries, network effects, content travelability, global media, digital-first strategies, sports documentaries, sports storytelling

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Introduction: From broadcasting to streaming

Sport and television have long maintained a symbiotic relationship, an alliance that reached its peak with the development of pay television in past decades (Rowe, 2004: 11–36; Boyle and Haynes, 2009: 19–42). Pay-TV providers such as Comcast and DirecTV in the United States, Sky, Canal Plus, and beIN Sports in Europe and the Middle East, have placed live sports rights at the core of their business models. While online media and the Internet have already begun to reshape the media-sport nexus (Burroughs and Rugg, 2014; Hutchins and Rowe, 2010; Lee Ludvigsen and Petersen-Wagner, 2023), streaming giants such as Apple TV+, Amazon Prime Video, Netflix and YouTube have the greatest potential for disruption. As these newcomers make significant inroads into the sports rights market, this article examines their impact on the sports media landscape. It argues that, although live sports coverage is unlikely to become as central to the business model of global streaming platforms as it is for pay-TV providers, these actors nonetheless signal a re-configuration of power within the media-sport nexus.

The article begins by providing an overview of the sports rights contracts recently secured by global streaming platforms, highlighting the strategic divergences among them. It then explores the shifting balance of power in the sport-media landscape in the platform age. Being far less dependent on sport than pay-TV providers, global streamers are highly selective, only pursuing agreements that align with their brand identities and broader entertainment strategies. As sports leagues adopt digital-first strategies, partnerships with streaming platforms have become essential. These services provide access to digital-native audiences who do not engage with linear television, while their global reach supports both the international visibility of sporting competitions and the geographical expansion of fanbases.

Moreover, sports organisations can leverage the distinctive features of platforms such as Amazon Prime Video and YouTube to enhance their marketing activities. As digital natives increasingly access sport through social media, their engagement is often driven by personal accounts and human-interest stories. Through high-profile documentary series that foreground the emotional and personal dimensions of sport, streamers have consolidated their presence within the contemporary *sports storytelling ecosystem* by bridging competition and human-interest narratives. These series are conducive to fostering younger audiences' engagement with live sports coverage.

The article's theoretical contribution lies in its application of platform theory to the streaming industry. It argues that while television operates within the logics of the entertainment economy, streaming platforms are embedded in the platform economy. By mobilising platform theory, the article analyses the role of network effects in shaping the circulation and monetisation of content, thereby offering insights into the key differences between the broadcasting and streaming eras of live sports coverage.

Global streaming platforms and live sports coverage

This section provides an overview of the sports rights agreements recently secured by four global streaming platforms: Amazon Prime Video, Apple TV+, Netflix and YouTube. While all four have demonstrated a growing interest in live sport, their strategic approaches vary considerably.

Apple entered the sports media arena in 2022, acquiring the rights to a weekday package of Major League Baseball (MLB) games. The 7-year deal, valued at US$595 million, initially covered nine countries (including the United States), and has since expanded to 60 territories (Steinberg, 2022). Building on this investment, Apple subsequently secured a 10-year agreement worth

US$2.5 billion to stream Major League Soccer (MLS) matches globally. Access to these broadcasts require subscribers to purchase a season pass.

YouTube hosts a substantial volume of sports content, with professional leagues and sport federations extensively using the platform to distribute highlights and ancillary programming. However, beginning with the 2023 season, YouTube expanded its role in live sports coverage by acquiring exclusive rights to the NFL's *Sunday Ticket*. The 7-year agreement, valued at US$14 billion, marked a significant shift, as the NFL ended its long-standing partnership with DirecTV (the rights holder since 1994) despite offering a comparable financial package (Sweney, 2022). Although *Sunday Ticket* games are available only within the United States, NFL executives have expressed interest in leveraging YouTube's global reach. The 2025 season opener between the Kansas City Chiefs and the Los Angeles Chargers, held in São Paulo, Brazil, constituted YouTube's first exclusive global NFL stream (McCaskill, 2025).

Netflix made its first major investment in live sport in 2024, entering a 10-year agreement with World Wrestling Entertainment (WWE) to become the exclusive global streaming platform for *Monday Night Raw*. The deal, which started in 2025, is valued at US$5 billion (Otterson, 2024). In addition, Netflix signed a 3-year contract with the National Football League (NFL) to stream two games on Christmas Day games annually, at an estimated cost of US$75 million per game (Weprin, 2024).

The WWE partnership has proven highly successful for Netflix, with the programme consistently ranking among the platform's most-watched content. Building on this momentum, the streamer has continued to expand its live sports portfolio. In September 2025, Netflix served as the exclusive global broadcaster for a high-profile boxing match between Canelo Álvarez and Terence Crawford. Demonstrating a nascent interest in tennis, it streamed an exhibition match between Carlos Alcaraz and Rafael Nadal in 2024, followed by coverage of an international exhibition tournament held in Saudi Arabia in October 2025. The platform further pursued the global broadcasting rights for the Ultimate Fighting Championship (UFC), although these were ultimately awarded to Paramount (Dixon, 2025).

Netflix has adopted a distinctive strategy in its approach to live sport. A key feature is the pursuit of worldwide rights, all the agreements being multi-territory in scope. The NFL Christmas games were streamed in five languages, the second occasion that the NFL grants a single outlet international distribution rights. The WWE partnership and interest in UFC suggest a deliberate focus on younger audiences. Moreover, the streamer prioritises sports that align with its brand identity, which is associated with scripted drama. In WWE, Netflix identified a sport that resonates with its entertainment ethos. WWE combines narrative-driven content with athletic performance. Given that match outcomes are predetermined, it can be understood as a hybrid form of scripted entertainment combining acting and athletic performances, and featuring performers in a ring rather than actors on a set.

Amazon Prime Video has demonstrated the most sustained commitment to live sports coverage. In contrast to Apple TV+ and Netflix, Amazon initially prioritised single-country agreements. The early contracts in the late 2010s were relatively modest, involving minority rights packages for domestic competitions (e.g. Copa do Brasil in football), or leagues broadcast outside their country of origin (e.g. New Zealand cricket in India). Since then, Amazon has significantly expanded its portfolio, securing rights to Roland Garros in France – sharing daytime coverage with the national public broadcaster while obtaining exclusive rights to night sessions – as well as UEFA (Union of European Football Associations) Champions League in the United Kingdom, Germany and Italy (Tuesday package), and the National Hockey League (NHL) in Canada (2024–26).

It is in the United States, however, that Amazon has made its most substantial investments. Following earlier non-exclusive arrangements with the NFL, Amazon Prime Video became the exclusive domestic broadcaster of *Thursday Night Football* in 2023, under a 10-year agreement that is valued at approximately US$1 billion annually. In motorsports, NASCAR divided its US media rights among four partners for a 7-year period beginning in 2025. The US$7.7 billion deal includes three broadcasters (Fox, NBC and Warner Bros. Discovery) and, for the first time, a tech platform: Amazon Prime Video. Under this arrangement, Amazon secured rights to five Cup Series races – nine fewer than Fox and NBC – along with exclusive coverage of additional events (Brittle, 2023).

Amazon's most geographically expansive contract was signed in 2024 with the National Basketball Association (NBA). Beginning in 2025 and spanning 11 years, the deal guarantees exclusive coverage of 66 regular-season games, selected playoff matches, and various exhibition events. It also includes rights to 30 regular-season and playoff games from the Women's National Basketball Association (WNBA). Valued at approximately US$1.8 billion annually, the agreement has a broad international scope, albeit excluding territories such as China and the Nordic countries (Miller, 2024; Williams et al., 2024).

Amazon Prime Video stands out in terms of both the scale of its investment and the territorial scope of its rights portfolio. With an estimated annual expenditure of US$4.7 billion on sports rights (Strauss, 2024), it significantly outpaces competing streaming services. Further, the tech giant has pursued more single-territory deals than its rivals, despite the inherent limitations such deals impose on content circulation. This strategy reflects the company's broader corporate structure, which encompasses substantial operations in cloud computing and e-commerce. Both sectors depend on geographically grounded infrastructure investments in markets such as the United States, Canada, Mexico, Brazil, Germany, the United Kingdom, India and Japan. In this context, single-country rights deals function as instruments to reinforce Amazon's commercial ecosystem within key markets. The company recognises the positive correlation between Amazon Prime membership and consumer spending on its e-commerce platform, viewing entertainment provision as a lever for enhancing customer engagement. With 59% of its revenue generated in North America (Amazon, 2026: 24), Amazon's acquisition of premium sports rights in the United States and Canada appears strategically justified.

While each major streaming platform has adopted a distinct approach to live sports coverage, there is a clear convergence in timing: the most significant agreements have all been concluded since 2022. This trend aligns with broader shifts in platform monetisation strategies. Amazon Prime Video and Netflix have introduced ad-supported subscription tiers, while Apple TV+ has incorporated commercial breaks into its live sports broadcasts. Although live sport is accessible to all subscribers, it primarily functions as a generator of advertising inventory. Advertising volumes increase substantially during live events, helping to offset the high costs associated with rights acquisition. In this context, live sport serves multiple strategic purposes: enhancing value for existing subscribers, attracting new audiences, and generating additional revenue streams through advertising.

Content travelability in the platform age

This section situates sports coverage within the broader context of the digital economy. While global streaming platforms compete with traditional pay-TV providers, a degree of complementarity persists between the two. Pay-TV services operate within the *entertainment* economy, whereas streaming platforms are embedded in the *platform* economy. Notably, streaming services have achieved significant growth without relying on live sports content, in contrast to pay-TV

operators, which still depend heavily on such programming. Originally, online streaming services were not designed to support live entertainment. Moreover, the circulation of content within the platform economy differs markedly from traditional media models. Streaming services derive competitive advantage by enabling content to travel across borders and by leveraging their catalogue across multiple territories. This strategy, however, is less easily applied to live sport, which remains constrained by territorial licensing agreements. Consequently, live sports coverage is not central to the business model of global streaming platforms. Instead, rights acquisition tends to be selective and case-specific, evaluated in terms of alignment with a platform's brand identity and broader content strategy.

Streaming platforms were originally conceived as video-on-demand (VoD) services, allowing subscribers to access libraries at their convenience. The supply chain underpinning VoD media delivery is now well established, combining large-scale cloud infrastructure providers with specialised firms operating at the network's edge. These firms deploy content delivery networks (CDNs) to bypass traditional internet pathways, caching content closer to end users and using predictive algorithms to determine which programmes should be preloaded (Chalaby, 2023: 74–92, 136–42).

By contrast, live streaming presents significantly greater technical challenges. It requires stringent latency performance, as audiences expect near real-time transmission, particularly in situations involving live betting or concurrent social media interaction (Li et al., 2023). Achieving low latency depends on advanced network infrastructure and highly optimised transmission pathways. In addition, major live events introduce issues of concurrency and scalability: traditional VoD systems are not designed to handle the millions of simultaneous video streams that such events generate. Addressing this demand necessitates scalable architecture and infrastructure, including specialised encoding and transport optimisation techniques.

Large-scale sporting events require a fundamentally different streaming architecture from that used by subscription-based VoD (SVoD) platforms. While these challenges can be addressed through partnerships with major cloud providers and media delivery specialists, they nevertheless entail significant adaptation for streaming services (Streaming Media, 2024). For instance, Netflix's initial foray into live events, such as *Chris Rock: Selective Outrage*, was relatively modest in scale. However, the transition to globally streaming WWE matches and NFL games required a substantial technological overhaul. Netflix's engineering team reportedly spent 9 months developing a new architecture capable of supporting live distribution at scale (Fedorov et al., 2025).

A second key factor concerns how streaming giants establish a competitive advantage over domestic media providers. These services operate within the framework of platform capitalism (Srnicek, 2017), in which the leverage of scale provides a decisive competitive advantage. Global streaming platforms harness this scale through the generation of network effects. These effects are described as direct and positive when user utility increases with the number of participants, a dynamic that both retains existing users and attract new ones (Gawer, 2014: 1240-1; Parker et al., 2016: 16–34; Steinberg, 2019: 97–102; Belleflamme and Peitz, 2021: 13).

Such dynamics are most evident in the video-sharing market, where YouTube maintains global dominance. With an estimated 2.5 billion monthly active users, the platform attracts content creators and organisations seeking extensive reach and optimal advertising revenue. The resulting volume of user-generated content drives further engagement, thereby reinforcing YouTube's market position.

At first glance, SVoD platforms appear less conducive to network effects as they do not bring together two sides of a market (Rochet and Tirole, 2003). Unlike platforms such as YouTube or TikTok, subscribers on SVoD services do not interact with content producers. Nevertheless, under

certain conditions, an expanding subscriber base can enhance value for all users. These effects are particularly significant when a platform's digital architecture and content strategy are aligned to generate them. Netflix, the world's leading SVoD provider, provides a notable example of this approach.

Netflix has invested in Korean content entering the market in 2016 (Ju, 2024: 431-4). This investment paid off a few years later, when it became the country's leading SVoD service in the early 2020s (Kim, 2022; 1509; Wayne and Ribke, 2024: 1356). Yet Netflix offers far less Korean content than local platforms such as Wavve and Watcha (Kang, 2024), raising the question of how to explain its popularity. The service offers an attractive mix of three types of content: local; trans-local (non-English programmes primarily intended for another market but which travels far and wide, such as Japanese anime); and global content produced at the onset with an international audience in mind (e.g. Hollywood films) (Chalaby, 2026: 6–10). Thus, Netflix dominates the Korean streaming market because it offers Korean viewers local drama alongside a diversified library.

Similar dynamics are observable in other markets. In the United Kingdom, Netflix has made substantial investments and currently holds a leading position among SVoD services (Ofcom, 2025: 31). The British streaming landscape is highly competitive, with services such as BBC iPlayer and ITVX producing and distributing significantly more local content than Netflix (Fontaine, 2024). As in South Korea, Netflix maintains sufficient local programming to engage domestic audiences but its competitive advantage stems from the breadth and diversity of its content library, which includes Hollywood productions and non-English language content such as Korean dramas.

In both South Korea and the United Kingdom, Netflix's large and diversified library enables it to leverage scale and transform it an unassailable advantage over local rivals. Network effects are particularly powerful in the streaming industry because they work transnationally, which is not the case in all sectors. In the ride-hailing industry, for instance, these effects are geographically bounded as customers can only hail a car in their immediate vicinity. Thus the advantage a ride-hailing app may derive from network effects in one market are not transferable to other territories (Stallkamp and Schotter, 2021: 60). In streaming, by contrast, nothing prevents a Korean subscriber from watching a British series. As Korean viewers benefit from content primarily produced for the British market, and vice versa, Korean and British audiences mutually benefit from subscriber growth in each other's territory, since growth in one territory provides the revenue and incentives for a platform to increase its content in that particular location (Stallkamp and Schotter, 2021: 70). In the case of Netflix, research confirms that the number of subscribers in a territory is positively correlated to the number of original series produced in that country (Iordache et al., 2022: 248). Today, global leading platforms commission an increasing amount of content outside the US market (Kupczyk, 2025), a strategy that is underpinned by their ability to generate *transnational network effects* and explains their global dominance (Chalaby, 2025: 116-17).

The generation of transnational network effects depends on the ability of content to circulate across borders, which in turn requires the acquisition of global rights. This strategic imperative compels global streaming platforms to secure worldwide distribution rights when negotiating licensing agreements or commissioning original content (Chalaby, 2023: 41-3). Live sport, however, presents unique challenges in this regard. Unlike other genres, live sport is significantly more difficult to distribute internationally due to territorial licensing constraints and local audience preferences. As a result, live sport has not, historically, played a central role in the value proposition of major streaming services.

Content travelability and the sports rights market

The challenges associated with the transnational circulation of live sports programming are both cultural and economic. Only a limited number of sports enjoy truly global appeal, as audience interest vary across nations. What constitutes a premium sport in one country may be considered niche in another (Rowe, 2003). For example, alpine skiing is a mainstream sport in only a handful of European nations – namely, Austria, Norway, and Switzerland – while MotoGP, despite being hosted in 20 countries in 2024, enjoys particular popularity in Spain, Italy, and parts of Southeast Asia (Brittle, 2024).

Regulatory frameworks further complicate cross-border distribution. Governments have idiosyncratic approaches to competition law, further restricting the availability of sports rights across markets (Rowe, 2004: 96-9; Evens et al., 2013: 68–103). In addition, global governing bodies such as the International Olympic Committee (IOC) and the Fédération Internationale de Football Association (FIFA) have their own universal access obligations, which prevent their events from being exclusively distributed behind paywalls (Miller et al., 2012: 8). These organisations must partner with broadcasters that offer the widest possible national reach, typically public service or commercial terrestrial networks.

A further constraint lies in the imperative to optimise rights monetisation. Sporting bodies holding high-demand rights maximise their value by unbundling and fragmenting them, licensing content on a platform-by-platform and territory-by-territory basis. As a result, leagues and federations maintain relationships with multiple media partners.

Formula 1, for example, is distributed through more than 60 media partners worldwide. While some broadcasters hold multi-territory rights – Sport Klub in the Balkans, Viaplay in the Nordic and Baltic regions, and beIN Sports across the Middle East, Africa, and parts of Asia-Pacific – rights in major markets like China are divided among multiple entities (beIN Media Group, 2024; Formula 1, 2025). Similarly, the English Premier League maintains around 43 media partnerships globally, even though media organisations such as Canal+, beIN Sports, ESPN and Viaplay hold rights for multiple territories (Premier League, 2026).

FIFA experimented with selling global rights to intermediaries, who would then auction them to media conglomerates. This model led to financial disaster and was abandoned (Sugden and Tomlinson, 1998: 73–99). Today, FIFA sells the World Cup broadcasting rights on a country-by-country basis. It initiates a tender process two to three years in advance, inviting bids from interested parties for specific territories (FIFA, 2024). Local regulatory frameworks, combined with FIFA's own criteria for mass audience engagement, mean that rights are typically awarded to broadcasters with the widest national coverage – most often public service or free-to-air commercial networks.

DAZN, a London-based streaming service founded in 2015, remains the only sports-focused platform not affiliated with a legacy media company. Its financial difficulties underscore the challenges of operating in a fragmented rights landscape that constrains the generation of network effects. Because sports rights are territorially fragmented, DAZN's content offering is siloed into discrete territorial containers. With no scope for cross-border portability, content availability in any given market is contingent upon the acquisition and affordability of local rights. As a result, DAZN rights are often non-exclusive (e.g. F1 in Japan, UEFA Champions League in Germany/Austria/Switzerland), its content portfolio varies significantly across territories, and its market penetration is uneven – much stronger in some countries (e.g. Spain) than in others (e.g. the United Kingdom and the United States) (Table 1).

Table 1. Selection of key rights in DAZN's main markets, 2024.

Key markets	Key rights
Germany, Austria and Switzerland	Bundesliga; UEFA Champions League; NFL; NBA; UFC; Range of women's sports
Belgium	Belgian Pro League (football); UEFA qualifiers; Bundesliga (Germany); LaLiga (Spain); Serie A (Italy); Ligue 1 (France); NBA; NFL
Italy	Serie A (ten matches); UEFA Europa League; UEFA Conference League; FA Cup and League Cup (British football); NFL; UFC; Women's football
Spain	LaLiga (Spain), Premier League (UK); F1; MotoGP
Portugal	Bundesliga (Germany); LaLiga (Spain); Serie A (Italy); Premier League (UK); UEFA Champions League; NFL; WTA (women's tennis)
UK	Boxing; MMA (mixed martial arts); Saudi League (football); Extreme sports; Women's football
Japan	J League (football); Japanese Professional Baseball; LaLiga (Spain); Serie A (Italy); Ligue 1 (France); F1; NFL; Japan Women's Professional Golf Association
USA	Boxing; MMA (mixed martial arts); UEFA Women's Champions League

Source. DAZN Group, 2024

When entering new markets, DAZN compete – at best – on equal terms with domestic broadcasters. It must build operations from the ground up in each and every territory, including securing rights prior to launching its service. Unable to generate network effects at scale, DAZN operates as an international rather than a global platform, a distinction with significant financial consequences. The company reported net losses of approximately US$1.3 billion in 2021, US$1.1 billion in 2022, US$1.4 billion in 2023 and US$936 million in 2024, further adding to prior liabilities (DAZN Group, 2023; Sim, 2025).

In contrast, global streaming platforms capitalise on their extensive cross-market libraries, never competing on equal terms with local providers. The portability of their content generates network effects, enabling them to convert scale into a sustained strategic advantage. The restricted transnational mobility of live sports coverage provides an early indication of how the platform age is reconfiguring the sport-media nexus. While global streaming services are poised to continue transforming the sports media landscape, traditional pay-TV operators are likely to preserve control over certain premium sports rights. This reflects the compatibility of their pricing models and single-market focus with the structural characteristics of the sports rights industry.

Global streaming platforms as strategic partners

Streaming giants occupy a significantly stronger bargaining position vis-a-vis sports leagues than pay-TV operators. Unlike legacy pay television, they are not structurally dependent on live sport and possess a range of strategic assets that align closely with the digital-first ambitions of rights owners. The following sections examine these dynamics in greater detail.

Engaging younger and international audiences

The majority of live sports content remains behind paywalls. While public service broadcasters in host countries retain rights to selected marquee events – such as the Wimbledon Championships (BBC) or the Tour de France (France Télévisions) – most major competitions are controlled by pay-

TV providers. This includes domestic football and rugby leagues, tennis tournaments, golf majors, cycling races, MotoGP, and Formula 1. Key players in this space include Sky, Canal+, and beIN Sports in Europe, as well as DirecTV, Dish Network, and Comcast's Xfinity in the United States. Although these providers offer streaming options, such packages are typically bundled with traditional pay-TV subscriptions. These packages are considerably more expensive than standalone SVoD services and are structured on a market-by-market basis.

While pay-TV operators offer substantial financial guarantees to sports leagues, this model presents challenges for long-term audience development. Younger demographics are increasingly disengaged from linear television. In the United Kingdom, for example, adults aged 65–74 watched an average of 231 minutes of live TV per day in 2024, compared to just 17 minutes among those aged 25–34, a decline of 93%. The latter group spent significantly more time on streaming platforms, averaging 134 minutes daily (Ofcom, 2025: 19). Comparable trends have been observed in Latin America and across Europe (Esser et al., 2025; Straubhaar et al., 2021). In the United States, years of cord-cutting have led to a marked shift: 83% of Americans report using streaming services compared to 36% who maintain a pay-TV subscription (Park and McClain, 2025). Moreover, audiences for live sports on pay television are older than the average population due to the high subscription costs, which younger viewers are more likely to be unable to afford (Modha, 2024).

Sports leagues and federations have increasingly recognised the need to adopt digital-first strategies to engage younger audiences. All major U.S.-based leagues maintain a presence on social media, with YouTube serving as a cornerstone of their digital outreach (Chalaby, 2022: 231-6). These organisations operate multiple YouTube channels and curate platform-specific content, including interviews, previews, highlights, delayed full-game broadcasts, documentaries, tributes, career retrospectives, public announcements, and a large volume of short-form clips showcasing notable moments and plays. Among these, three leagues – the WWE, the NBA and the NFL – stand out for their consistent and strategic use of YouTube. At the time of writing, WWE's main channel had amassed 113 million subscribers and over 94,000 uploaded videos, the NBA had 24.4 million subscribers and 78,000 videos, and the NFL had 16.3 million subscribers and 57,000 videos. The MLB, the MLS and the NHL maintain a comparatively modest presence.

Streaming platforms such as Amazon Prime Video and Netflix are particularly effective at attracting younger audiences, making them indispensable partners for sports leagues seeking to rejuvenate their fanbase. As Minal Modha observes, 'the increased availability of sport on platforms which are used most frequently by young audiences provides more opportunity for engagement and reduces, in theory, the cost barrier which a pay-TV subscription requires' (Modha, 2024). This rationale underpins the proliferation of social media accounts, YouTube highlights and, more recently, live sports agreements with major streaming platforms.

Streaming giants possess unparalleled global reach. In 2026, YouTube reported 2.5 billion monthly users worldwide, Amazon Prime Video had 240 million subscribers and Netflix exceeded 300 million paid memberships. Both Netflix and YouTube have larger overseas than domestic (American) user bases. Professional sports leagues are seeking to leverage this scale. The four major U.S.-based leagues (MLB, NBA, NFL, and NHL) have long sought to expand their international footprint and accrue overseas revenue (Maguire and Falcous, 2005: 23–39; Miller et al., 2012: 11–17). Yet returns on these efforts have been patchy and, in Europe at least, inconclusive. With the domestic U.S. market largely saturated, future growth increasingly depends on international expansion. Enhancing engagement with global audiences is therefore essential to maximising the value of media rights, which generate billions of dollars annually in the United States

but remain under-monetised abroad (Porter, 2024). Partnerships with global streaming platforms offer a pathway to extend geographic reach and optimise revenue generation.

This strategic imperative is reflected in public statements by leading rights owners following major streaming deals. Upon signing a global partnership with Netflix, Mark Shapiro, president of the holding company which owns WWE, described the agreement as 'transformative', bringing together 'the WWE product with Netflix's extraordinary global reach' (WWE, 2024). Similarly, NBA Commissioner Adam Silver, stated that 'our new global media agreements with Disney, NBCUniversal and Amazon will maximise the reach and accessibility of NBA games for fans in the United States and around the world' (NBA, 2024).

Providing a suitable environment for the digital era

Additional factors underscore the pivotal role played by major online streaming platforms in the implementation of sports leagues' digital-first strategies. These services provide a digital environment through which sports organisations can market and distribute their products. They offer a range of digital passes that extent access to games beyond the coverage agreement. For instance, the NFL Game Pass is available on Amazon Prime Video, DAZN and YouTube, the MLS Season Pass on Apple TV+, and the NBA League Pass via Amazon Prime Video. In addition, merchandise, tour packages, and tickets for international fixtures (e.g. NFL games in Brazil, Germany, or the United Kingdom) are made available through these platforms. Such exclusive partnerships support leagues' marketing efforts while simultaneously deepening the strategic ties between platforms and rights owners.

Sports leagues lean on the technological capabilities of their partner platforms. Amazon, for instance, utilises the advanced cloud infrastructure of its subsidiary AWS (Amazon Web Services) to enhance live sports coverage through AI-driven features. Prime Vision – used in broadcasts such as the UEFA Champions League and NFL games – integrates real-time analytics and machine learning to deliver visual overlays and predictive metrics, offering viewers deeper insights into game strategy. These innovations also include alternative camera angles, making tactical aspects more accessible to a wider audience. Such technological enhancements are embraced by sports leagues as tools for increasing fan engagement (Steinberg, 2024).

Another illustration of platform-league collaboration is provided by YouTube and the NFL. On 21 September 2025, when the San Francisco 49ers hosted the Arizona Cardinals, YouTube CEO Neal Mohan welcomed NFL Commissioner Roger Goodell to a luxury suite populated with prominent YouTube creators. This event signalled the intention of both parties to deepen their fledgling relationship (Rodrigue, 2025). Having already replaced DirecTV with YouTube (above), and established no fewer than ten NFL-branded channels on the platform, Goodell has made abundantly clear that he views YouTube as indispensable to the renewal and international expansion of NFL's fanbase.

The NFL Commissioner was also there to meet with content creators as part of a broader initiative to integrate creator-led content into NFL broadcasts. This includes creators participating in matchday coverage, interacting with players, and producing pitch-side material. Another format is the 'altcast', which offers viewers the option to watch games accompanied by commentary from their favourite creators (Rodrigue, 2025). Through these initiatives, the NFL seeks to capitalise on YouTube's creator-centric ecosystem, embedding it within its marketing and fan engagement strategies.

The new sports storytelling ecosystem

In the contemporary digital media ecosystem, global streaming platforms provide a crucial link between human-interest stories and the live broadcast of sporting events. Through their daily engagement with social media, younger generations often develop an interest in sport via personal narratives and individual experiences shared online (Modha, 2024). They are accustomed to athletes using social media accounts to share their challenges and triumphs. Long before securing live coverage rights, streaming giants had established a discursive environment conducive to 'capturing audiences for rights holders' (Modha, 2024). Most notably, they commissioned high-profile documentaries that explore the emotional and personal dimensions of sport. When the story behind a rivalry or the journey preceding a victory is as significant as the event itself, such documentaries serve to bridge the gap between competition and human-interest narratives.

Amazon Prime Video and Netflix began producing sports documentaries in the mid-2010s, with Apple TV+ entering the field in 2019. The biopic – a subgenre focussing on an athlete's life or defining career moments – is the most prevalent format across these platforms. To appeal to global audiences, these documentaries typically feature internationally recognised figures such as Simone Biles (Netflix), Roger Federer (Amazon Prime Video), and Cristiano Ronaldo (Apple TV+). Among Netflix's 2026 releases are a biopic of Rafael Nadal and, ahead of FIFA World Cup 2026, films covering footballers Jamie Vardy, Vinny Jones, Ronaldinho and Emiliano Martínez. The streamer's catalogue extends to investigative works such as *Icarus* (on Russian doping scandals, 2017), and *FIFA Uncovered* (on corruption in the football governing body, 2022).

Amazon Prime Video's flagship sports series, *All or Nothing*, launched in 2018, offers an immersive portrayal of a team's season, both on and off the pitch. The production crew is granted extensive access, filming training sessions, changing rooms, medical facilities, and team and executive meetings, as well as conducting interviews with fans, players, coaches, and owners. Originally owned by the NFL (e.g. *All or Nothing: Philadelphia Eagles*), the franchise was acquired by Amazon, which launched its version with *All or Nothing: Manchester City*.

This initial series, produced by a Spanish television crew, encountered several issues, prompting Amazon to seek a partnership with a specialist documentary maker. London-based 72 Films identified intermittent access as a key limitation of the original series and proposed a more continuous and immersive filming approach. Drawing on their experience in settings such as schools and hospitals, they rigged the changing rooms to allow permanent access, implementing this methodology in *All or Nothing: Tottenham Hotspur* (2020) and *All or Nothing: Arsenal* (2022).

The *All or Nothing* series distinguishes itself from traditional sports documentaries through several key features. Foremost among these is the unprecedented level of access granted to production crews, enabling audiences to witness behind-the-scenes moments typically concealed from public view. This includes footage of Harry Kane receiving treatment (then a Tottenham striker) and in-depth interviews with José Mourinho (then manager, Tottenham Hotspur). Such access comes with at a considerable cost, covered by Amazon, which also funds the high-end production required to deliver visuals that match the intensity of the narrative. *All or Nothing* relies on an extensive production infrastructure, including multiple cameras positioned in the changing rooms, training grounds and pitch-side locations, allowing the crew to capture the unfolding story with depth and immediacy.

Sports documentaries span a range of narrative modes, which Bill Nichols categorised as poetic, expository, observational and participatory (McDonald, 2007: 211-15). According to executive producer Mark Raphael, the series adheres to the observational mode (Raphael, 2024) in that it neither looks back nor employs a voice-over to interpret past events for the audience. Avoiding

retrospective narration and voice-over commentary, the film allows events and individuals to speak for themselves. A narrator guides viewers through the unfolding, present-tense action, enhancing the immersive experience and inviting audiences to follow the narrative as it develops (Raphael, 2024).

The overarching narrative structure is shaped by the natural progression of the season. It begins with a sense of anticipation, followed by challenges and setbacks, and culminates with a resolution. Each episode develops its own narrative arc within this broader trajectory. The Premier League is a challenging environment and teams fluctuate in performance. Some players excel while others underperform or suffer injuries, managers get sacked, and new figures emerge. *All or Nothing* can be understood as a play within a play, in which footballers and staff express their thoughts and emotions about their performance in the competitive process. While most storylines emerge organically, they are heightened when the stakes are high or when pivotal moments occur, such as the North London derby between Arsenal and Tottenham. Heroic or redemptive arcs are foregrounded but not artificially constructed (Raphael, 2024).

Netflix has commissioned multiple sports documentary series based on a similar premise, none more prominent than *Formula 1: Drive to Survive*.[1] Produced by London-based Box to Box Films, *Drive to Survive* was launched in 2019 and, at the time of writing, is in its eight season. It has had a significant impact on the sport's global visibility and engagement among younger audiences (Boyle and Haynes, 2024: 119-39; Shah and Williams, 2025).

Both *All or Nothing* and *Drive to Survive* are high-budget productions that chronicle an entire season, feature cinematic visuals and benefit from unparallelled access to their respective sports. While *All or Nothing* focuses on a single club, *Drive to Survive* follows multiple teams across the season. *All or Nothing*, originally developed by a sports organisation, offers primarily an in-depth and – within the constraints of televisual storytelling – relatively authentic portrait of a team. By contrast, Netflix, in line with its core values, approaches sport from a more entertainment-oriented perspective. While *All or Nothing* adheres more closely to documentary conventions, *Drive to Survive* draws extensively on the storytelling techniques of reality television. The production team appears to enjoy permanent access, capturing, for instance, ostensibly private conversations between team principals in an Italian vineyard (Episode 1, Season 6), as well as domestic scenes such as Christmas Day at Christian Horner's home (then Red Bull team principal) (Episode 2, Season 6). In practice, however, the peripatetic nature of Formula 1 and the breadth of coverage render access intermittent. Consequently, storytelling relies less on observation and more on interviews and curated soundbites distilled by drivers and team principals. Although the producers have always prioritised compelling characters, earlier seasons were loosely structured around the championship's main stories. Over time, character-driven storytelling has become more pronounced, with all ten episodes of Season 6 revolving around personalities and storylines influenced by reality television.

Drive to Survive draws on the language and narrative conventions of reality competition formats, which aim to create heroes and are constructed as heroic tales (Chalaby, 2016: 150-67). Fashioning such myths from present-tense narratives is challenging, given that failure is the most common outcome in sport. In this context, heroism is not defined solely by victory but by the willingness to embrace a challenge, confront fear, and overcome obstacles. Triumph can therefore take the form of personal achievement. Max Verstappen, despite dominating the 2023 season, is largely absent from the sixth series until its conclusion. Instead, *Drive to Survive* focuses on underdog figures facing adversity. For instance, Episode 7 (*Leap of Faith*) follows the Mercedes team which, by its past standards is under-performing. The film opens in Monaco (round 6), where Lewis Hamilton and George Russel disappoint in fourth and fifth positions. Hamilton's frustration is evident and

discussions centre on his possible departure. He urges engineers to upgrade the car, which they do in time for the next race. In Barcelona, Mercedes' performance improves, with Hamilton finishing second with his teammate close behind. The episode concludes with both drivers on the podium, to the acclaim of the team. The narrative focuses on just two races out of a 22-race season (with results thereafter varying considerably), but this selective framing provides the episode with a sense of progression and a note of optimism.

These series innovate by drawing on a range of television genres and by scaling up classic elements of sports documentaries to craft compelling narratives. In doing so, they achieve multiple objectives for different parties. Streaming platforms have consolidated their presence within the contemporary sports storytelling ecosystem while retaining ownership of original intellectual property. Unlike live sports coverage, these documentaries constitute proprietary assets owned by the platforms themselves. At the same time, they enhance the global visibility of sports leagues and encourage digital natives to convert casual engagement into interest in live coverage.

Conclusion: Reconfiguring the power dynamics in the media-sport nexus

While global streaming platforms undeniably herald change in the media-sport nexus, live sports coverage is unlikely to sit at the core of their value proposition in the way it does for pay-TV providers. For this reason, terrestrial broadcasters and pay-TV operators will continue to play a role in the sports media space. Nevertheless, the entry of streaming giants into the sports rights market has shifted the historical balance of power between media organisations and sports leagues. In the past, the latter held the upper hand, as the well-documented inflation of sports rights illustrate. Among many examples, CBS paid US$390,000 for the US broadcast rights to the 1960 Rome Olympics, while NBC's current deal with the International Olympic Committee (running from 2021 to 2032) stands at a cool US$7.65 billion (Owen, 2023; Whannel, 1992: 162).

At first sight, the interest of streaming giants in live sports might appear likely to intensify competition for these rights. However, their ability to attract and retain subscribers without relying primarily on live sport allows them to remain highly selective in their acquisitions. Apple, for instance, walked away from negotiations over a rights package for the FIFA Club World Cup 2025, and Netflix judged that paying US$7.7 billion for 7 years of UFC fights did not make business sense. Amazon Prime Video has declined to renew several sports packages, including the Premier League Boxing Day matches in the United Kingdom. More broadly, global streamers tend to target minority packages (such as weekday fixtures), leaving premium rights to pay-TV providers, and sign deals that align with their brand identity and entertainment values. Consequently, the anticipated escalation of media rights following the entry of streaming giants into the sports rights market did not materialise, and numerous rights packages continue to attract little interest from these actors.[2]

As sports leagues adopt digital-first strategies, partnerships with global streaming platforms have become strategically indispensable. These services enable leagues to reach younger audiences and expand their geographical footprint, while acting as commercial partners. As digital natives access sport primarily through social media, their engagement is often shaped less by live competition than by personal accounts and human-interest stories. Through their documentary series, streaming platforms participate in the new *sports storytelling ecosystem* by creating content that bridges the gap between competition and human-interest narratives.

The evolving relationship between sports leagues and global streaming platforms is likely to remain mutually beneficial, but rights owners no longer hold all the aces. Compared to pay-TV operators, global streamers are in a far stronger position in the sport-media nexus. Their capacity to

reshape the sports media landscape is considerable, and the degree of disruption will ultimately depend on their strategic priorities and long-term investment trajectories.

Acknowledgement

The author wishes to thank the anonymous reviewers for their thoughtful comments and helpful suggestions, and the interviewees for generously sharing their time and knowledge.

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Funding

The author received no financial support for the research, authorship, and/or publication of this article.

Declaration of conflicting interests

The author declared no potential conflicts of interest with respect to the research, authorship, and/or publication of this article.

Notes

1. The other documentary films are *Tour de France: Unchained* (two seasons), *Break Point* (two seasons) *Full Swing* (two seasons), and *Sprint*, one season.
2. As an interviewee noted to Tom Evens and Paul Smith in relation to Belgian football rights; 'Five years ago, almost everyone expected these giants to take over the entire sports rights market, and push traditional providers out. That scenario has clearly not materialised' (Evens and Smith, 2026: 12).

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