

**PRICIER
THAN NETFLIX.**

**HARDER
TO LEAVE.**

**SPORTS CONTENT
EUROPE 2026**

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INTRODUCTION.

European sport is sold one market at a time, and fans pay for that design twice: once in the number of subscriptions they need, and once in the price of the right to leave them. This study puts a number on both — for live sport as a whole, not for football alone.

Live sport is the most expensive content a media company buys, and in most European markets it is the reason a household pays for television at all. This study is about that paid side of sport: the subscriptions, add-ons and bundles through which pay-TV operators, sports streamers, telcos and platforms sell live sport to consumers. Free-to-air television appears where it holds live rights, because it shapes what the paid offer has to compete with, but it is not the subject. Rights values are published and debated. The consumer side of those rights is not: which operators hold the live rights in a market, how the rights are packaged into products, what access costs on the day a season starts, and on which terms. That information is scattered across hundreds of operator pages, changes with every promotion and is rarely documented with a date. Without it, a rights tender is designed without knowing what it will cost the fan, and a pricing decision is taken without knowing what the market next door charges.

This study closes that gap for seven markets: the Big Five — Germany, the United Kingdom, France, Italy and Spain, home of Europe's five highest-revenue football leagues — and the two other DACH markets, Switzerland and Austria. It covers every sport with documented live rights: 28 sports in all, from football, basketball, motorsport and tennis to rugby, ice hockey, boxing, cycling and handball. Football is the largest single block with 40 per cent of the documented live competitions; the other 60 per cent are what makes a sports subscription a sports subscription rather than a football pass. The study documents the current picture — who holds which rights, what access costs and on which terms — and it introduces a named index that will be updated every September.

WHAT WE COLLECTED

ONE8Y documented the seven markets in the ONE8Y Database and checked every entry at the source. Prices and rights were retrieved and checked against the operators’ own pages between 18 September 2026 and 25 September 2026; the cut-off date for all prices is 18 September 2026. The data covers:

DATA	COUNT	WHAT IT CONTAINS
Markets	seven	Germany, United Kingdom, France, Italy, Spain, Switzerland, Austria
Operator profiles	118	78 distinct companies and brands, profiled per market: pay-TV groups, sports streamers, telcos, platforms, free-to-air broadcasters and leagues
Live rights partners	47	Normalised partners holding current live rights, from global platforms to creator channels
Rights records	570	390 of them current live rights, covering 341 distinct competitions (counted per market) in 28 sports
Tariff variants	296	192 sports tariffs in the price benchmark, 108 of them standalone pure sports subscriptions
Sports brands	43	Brands selling at least one sports tariff, classified by access and scope
Price pairs	35	Same product on a twelve-month and a monthly term, plus 15 entertainment pairs for comparison
Sources	800	Operator price pages, league and federation announcements, company filings, regulators; each with URL and date
Pre-publication check	146	Tariffs behind published findings, checked again at the operator’s own page

Operator profiles are counted per market: a group active in several markets, such as DAZN or Amazon, has one profile in each. Competitions are counted per market, so a league shown in three markets counts three times. Source: ONE8Y Database.

The data is not a sample of convenience. Every tariff carries its price, term, promotion, source and the date on which it was documented; every rights record carries the competition, the partner, the exclusivity class and the end year where one is published. Every figure in this study is computed from the ONE8Y Database, and every finding carries a rating of how far the data supports it.

WHAT THE STUDY DELIVERS

Three things that did not exist in comparable form before. First, the Sports Commitment Premium: an index of what fans pay for the right to cancel monthly, computed from like-for-like price pairs and compared with entertainment services. Second, a price and access benchmark across seven markets, anchored on Netflix Standard as the one product that is the same everywhere. Third, a documented inventory of who holds which live rights in each market, with the renewal calendar that shows where the structure changes next.

HOW THE STUDY IS ORGANISED

Part I compares the seven markets: the index, prices, access, the sports beyond football, and rights and market structure. Part II contains one chapter per market, with its key figures, the structure of its rights and products, what access costs, what to watch and the operator inventory from the ONE8Y Database. Part III sets out the dated transactions and awards, three scenarios to 2032 with observable triggers, and the implications for operators, rights holders, telcos and investors. The method appendix documents the rules behind every number.

SUMMARY.

Sport is priced as a seasonal product with a penalty for treating it seasonally. The premium for monthly cancellability is 2.28 times what entertainment services charge, and it holds in every market in the study.

SPORT · MONTHLY EXIT +45.6% Median surcharge, 35 price pairs	ENTERTAINMENT +20.0% Disney+ and Amazon Prime, 15 pairs	FACTOR 2.28× Sport against the comparison group
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This study compares the documented current picture of paid live sport in seven European markets — every sport with documented live rights, not football alone: who holds the rights, how they are packaged, and what a consumer pays. It contains no time series. Each finding below is computed from the ONE8Y Database and carries an evidence rating; findings with a known limitation state it directly after the finding.

SIX MESSAGES

- 01 PRICIER THAN NETFLIX.** In every one of the seven markets, the median flexible sports subscription costs more than Netflix Standard: 1.2 times as much in Germany, 2.0 times as much in Spain. Netflix Standard is the same product everywhere, so the comparison removes differences in general price levels. There is no market in the study where live sport is the cheaper subscription.
- 02 HARDER TO LEAVE.** Fans who keep the right to cancel monthly pay a median 45.6 per cent more than on a twelve-month term; Disney+ and Amazon Prime charge 20.0 per cent for the same right. Entertainment prices the exit right by rule — 14 of 15 entertainment pairs sit at exactly the same value. Sport prices it product by product, from 19.2 to 173.0 per cent. For operators that is a lever, not a law: the premium is set, and it can be reset.
- 03 ACCESS COSTS MORE THAN CONTENT.** The median flexible sports subscription costs between €19.95 and €42.17 a month. The documented route for a football fan costs 2.4 to 4.1 times a year of Netflix, because the league and the main European competitions sit with different operators. The fan's bill is set by the package design, not by the price of any single subscription.

04 NO MARKET SELLS ITS ANCHOR SPORT IN ONE PLACE. Only in France is the domestic top flight sold live through a single partner, the league’s own product; only in Spain does one broadcaster hold the Champions League. Everywhere else the core of the anchor sport is split, and in Germany the league alone has 3 live partners. The same holds beyond football: Switzerland’s second anchor sport, ice hockey, sits with a different operator from its football, and in Germany a fan of handball, basketball and ice hockey needs Dyn and MagentaSport. The split is a decision of each rights holder, and each market has taken it differently.

05 OPENNESS IS A MARKET DESIGN CHOICE. In Switzerland and Austria every sports brand sells a pure sports subscription on its own; in Spain only 25 per cent do, and complete football was documented only with a fixed-line contract. The same content reaches fans on very different terms, and the terms are set by who owns the distribution.

06 THE STRUCTURE IS ABOUT TO CHANGE. 38 per cent of dated competition-partner contracts end by 2027. The UEFA club competition cycle from 2027/28 changes the buyer in several markets; RTL now owns Sky Deutschland; Telefónica distributes DAZN’s LaLiga matches; Sky has agreed to buy ITV. The market that this study documents is the starting line of the next cycle.

FINDINGS WITHOUT QUALIFICATION

FINDING Cancelling monthly costs a median 45.6 per cent more than the same sports subscription on a twelve-month term (35 price pairs). For the entertainment comparison group the surcharge is 20.0 per cent, a factor of 2.28.

FINDING The domestic top flight is sold live through a single partner only in France; Germany has the most, with 3.

FINDING Only in Spain does a single broadcaster hold the UEFA Champions League; in every other market live rights are split between at least 2 partners.

FINDINGS WITH A STATED LIMIT

FINDING By market, the commitment premium is highest in Switzerland (63.8 per cent) and lowest in Germany and the UK (33.4 per cent).
LIMIT · Switzerland and Austria rest on two price pairs each; market values are directional.

FINDING The cheapest monthly-cancellable standalone sports subscription ranges from €4.99 a month in Germany (SPORTDIGITAL+ Monthly Pass) to €31.60 in Switzerland.
LIMIT · The cheapest documented tariff in each market; often a niche or partial package, not full access.

FINDING	The median monthly-cancellable sports subscription costs between €19.95 (Germany) and €42.17 (Switzerland) a month. LIMIT · The median depends on the mix of documented tariffs; Switzerland and Austria rest on few tariffs.
FINDING	Against Netflix Standard in the same market, the median flexible sports subscription costs 1.2 times as much in Germany and 2.0 times as much in Spain. LIMIT · Netflix Standard is the same product in all seven markets; the sports value is a sample median.
FINDING	The documented example route for a football fan costs between €456 (Austria) and €780 (Germany) over twelve months; the scope of the route differs by market. LIMIT · Example routes with different scope by market (league plus UEFA; football and ice hockey in Switzerland; available live access in the UK), not market averages. Converted at the rates of the cut-off date.
FINDING	That is 2.4 to 4.1 times the cost of a year of Netflix Standard. LIMIT · As for the example routes above; Spain is not in the comparison.
FINDING	On the cut-off date, 40 per cent of core sports tariffs in Switzerland carried a promotion, against 6 per cent in Italy. LIMIT · A snapshot at the start of the season; Switzerland rests on five core tariffs.
FINDING	Within one market, the dearest flexible sports subscription costs up to 9.0 times the cheapest (Germany); the narrowest range is 1.7 times (Switzerland). LIMIT · Depends on the cheapest documented niche offer.
FINDING	In Spain, complete access to LaLiga and the UEFA club competitions was only documented with a fixed-line contract; the cheapest route costs €972 over twelve months including fibre broadband. LIMIT · The absence of a route without fixed line rests on operator pages and market overviews as of the confirmation date; the value includes broadband and is not comparable with the example routes in the other markets.
FINDING	A free-to-air broadcaster holds live rights to at least one match of the domestic top flight in Germany, Switzerland and Austria; in the UK, France, Italy and Spain no free-to-air broadcaster holds live league rights. LIMIT · The free-to-air scope ranges from single matches to a fixed package. Free streams offered by pay operators (such as one open DAZN match per round in Spain) are not counted as free-to-air.
FINDING	38 per cent of dated competition-partner contracts end by 2027; the share is highest in Switzerland (64 per cent). LIMIT · Counting unit is competition × partner; contracts without a documented end year are excluded.
FINDING	Foreign top-five leagues are spread across up to 9 live partners in the UK; no other market has more than 4. LIMIT · Includes free streaming and creator channels; the depth of documentation varies by market.

FINDING	From the same provider, a partial package (one sport or a group of sports) costs 18 to 83 per cent of the full product; by provider, the median runs from 37 to 66 per cent. LIMIT · Twelve pairs from four providers in three markets (Germany, Italy, Spain); flexible monthly prices.
FINDING	The share of sports brands selling at least one sports tariff without a telco or TV contract runs from 55 per cent in France to 100 per cent in the UK, Switzerland and Austria. LIMIT · Small number of brands per market; classification per tariff documented in the ONE8Y Database.
FINDING	The share of brands selling a pure sports subscription without any other contract runs from 25 per cent in Spain to 100 per cent in Switzerland and Austria. LIMIT · As for the previous finding; bundles with entertainment do not count as pure sports subscriptions.

Findings: 24 computed, of which 3 are publishable without qualification, 15 with a stated limit and 6 are not published because the data does not support them reliably. Source: ONE8Y Database.

SCOPE AND METHOD.

Every number in this study is computed from one source, the ONE8Y Database. Nothing is estimated where a document is missing, and a missing document is not read as evidence that something does not exist.

PERIMETER	Audiovisual consumer offers for live sport in Germany, the United Kingdom, France, Italy, Spain, Switzerland and Austria. Radio, data, betting feeds and archive rights are outside the scope. The ONE8Y Database holds 570 rights records for this study, 296 tariff variants and 118 operator profiles, supported by 800 sources.
PRICE STATUS	Prices are public list prices in local currency as of 18 September 2026. For 205 tariffs a dated document covers the cut-off date; 83 were confirmed by retrieval between the cut-off date and 25 September 2026; 8 carry no date; none of them enters a price in any finding. Twelve-month values are a static comparison at an unchanged tariff, not a payment forecast. Pounds and francs are converted at the rates of the cut-off date: one euro equals 0.8588 pounds and 0.9462 francs.
CLASSIFICATION	Each tariff is classified by access (standalone, add-on to another contract, or telco/TV bundle) and by scope (pure sports subscription, sport bundled with entertainment, or sports module). The core of the price benchmark is the standalone pure sports subscription: 108 of 192 documented sports tariffs. Every classification is documented in the ONE8Y Database with its reason.
RIGHTS	The rights analysis uses current live rights only: 390 records covering 341 distinct competitions across the seven markets. Highlights, pure resale through a TV platform, clips and duplicate records are excluded. Partners are normalised, so that for example Sky Deutschland and Sky Italia count as one partner. Counts measure the depth of the documentation, not market size; a partner listing evidences the partner, not every match or window.

WHAT THIS STUDY DOES NOT DO

- It does not build a time series. Every value describes the market on the cut-off date.
- It does not construct a pan-European market total, because the national figures do not share a perimeter.
- It does not compare rights values with household spending across markets, because the published rights values and market figures are not defined on the same basis.
- It does not infer motives. Price lists show what operators charge, not why; explanations are marked as hypotheses.
- It does not claim that any example route is the cheapest possible access. Promotions, bundles and carrier offers change weekly.

PART I

THE SEVEN MARKETS COMPARED.

KEY FIGURE · PART I

2.28x

Sport charges 2.28 times as much as entertainment for the right to cancel monthly.

THE SEVEN MARKETS AT A GLANCE.

Seven markets, one database, one set of rules. The table below is the study on one page; the chapters that follow explain each column.

MARKET	PREMIUM	MEDIAN FLEX, €/MO	SPORT ÷ NETFLIX	FAN ROUTE, €/YR	STANDALONE	PARTNERS	ENDING BY 2027
Germany	33.4% (11)	19.95	1.2×	780	70%	3	38%
United Kingdom	33.4% (5)	30.26	1.9×	754	83%	2	32%
France	46.7% (5)	20.49	1.4×	559	55%	1	39%
Italy	50.0% (5)	24.99	1.8×	619	40%	2	36%
Spain	63.6% (5)	29.99	2.0×	972*	25%	2	29%
Switzerland	63.8% (2)	42.17	1.7×	695	100%	2	64%
Austria	47.0% (2)	29.99	1.9×	456	100%	2	43%

Premium: median surcharge for monthly cancellation, number of price pairs in brackets. Standalone: share of sports brands selling a pure sports subscription without another contract. Partners: live partners of the domestic top flight. Fan route: documented example route over twelve months, scope differs by market. * Spain: cheapest complete route, only documented with a fixed-line contract, including fibre broadband; not comparable. Source: ONE8Y Database.

Three patterns run through the table. The markets with the most fragmented top-flight football are not the most expensive per subscription but the most expensive per fan: Germany combines the cheapest median subscription with the dearest route. The markets where every brand sells standalone — Switzerland and Austria — are also the smallest and most concentrated, with few operators and few tariffs. And the premium for flexibility bears no relation to the price level: the UK and Germany have the lowest premium at very different price points, Switzerland and Spain the highest.

PRICE LEVEL AND THE PREMIUM

Plotted against each market's median flexible price, the commitment premium does not follow the price level. At almost the same price — around €30 a month — the United Kingdom charges 33.4 per cent for the monthly exit, Austria 47.0 and Spain 63.6. Germany and the UK share the lowest premium at the cheapest and the second-dearest median price. The premium is a separate pricing decision, set market by market.

MEDIAN FLEXIBLE PRICE VS. COMMITMENT PREMIUM, BY MARKET



X · Median flexible sports subscription, € a month Y · Commitment premium

Switzerland and Austria rest on two price pairs each. Source: ONE8Y Database.

PRICE LEVEL AND PROMOTIONS

Promotions do not follow price either. Switzerland combines the highest median price with the highest share of core tariffs in promotion (40 per cent) and the deepest discount: the median Swiss promotion takes 71 per cent off during its term, against 26 per cent across all markets. Italy, at a mid-table price, has the lowest share (6 per cent) and sells almost entirely at list price. France has the second-highest share (35 per cent) at the second-lowest price.

MEDIAN FLEXIBLE PRICE VS. SHARE OF CORE TARIFFS IN PROMOTION, BY MARKET



X · Median flexible sports subscription, € a month Y · Share of core tariffs in promotion on the cut-off date

Snapshot on 18 September 2026; Switzerland rests on five core tariffs. Source: ONE8Y Database.

THE SPORTS COMMITMENT PREMIUM.

Take a sports service that sells the same product on two terms: twelve months, or cancellable monthly. Across 35 such pairs in seven markets, the median surcharge for the monthly exit right is 45.6 per cent.

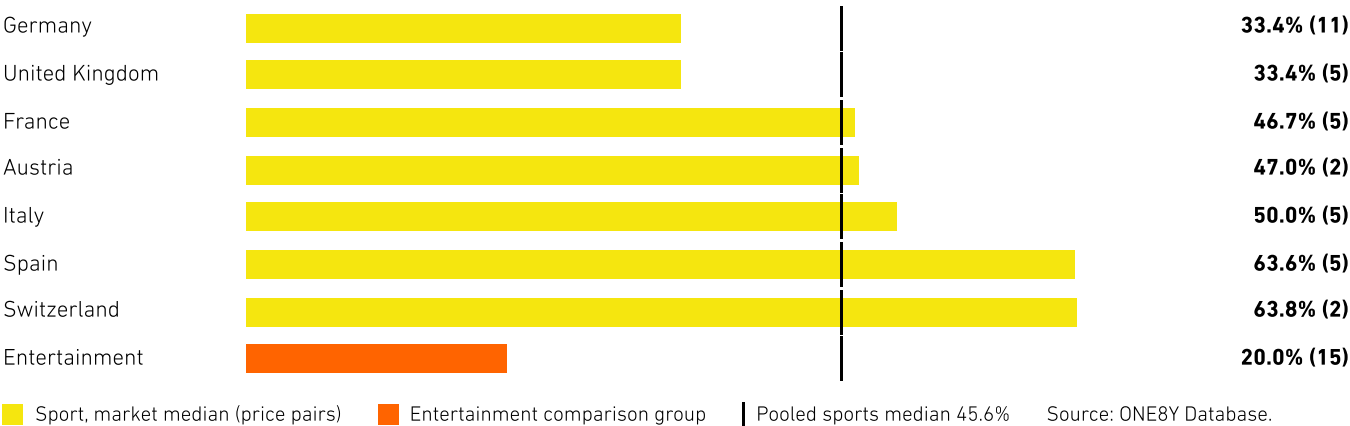
The comparison holds everything else constant. Both sides of a pair are the same product from the same provider at the same date; only the exit right differs. A pair qualifies only if the product is sold on its own, the annual side runs at least twelve months and the flexible side can be cancelled at one month or less. The rule is checked for every pair.

Entertainment services run the same two-term structure. Disney+ and Amazon Prime in five markets charge a median of 20.0 per cent (15 pairs); 14 of them sit at exactly that value, the exception being Amazon Prime UK at 13.6 per cent. Sport charges 2.28 times as much. The comparison group is not sport-free — both services carry some sport — and is therefore described as a comparison group, not a control.

BY MARKET

The premium is highest in Switzerland at 63.8 per cent and lowest in Germany and the UK at 33.4 per cent. Market medians rest on between 2 and 11 pairs; Switzerland and Austria have two each, so their values indicate direction rather than a level. The single pairs range from 19.2 per cent (TNT Sports, United Kingdom) to 173.0 per cent (DAZN Baloncesto, Spain).

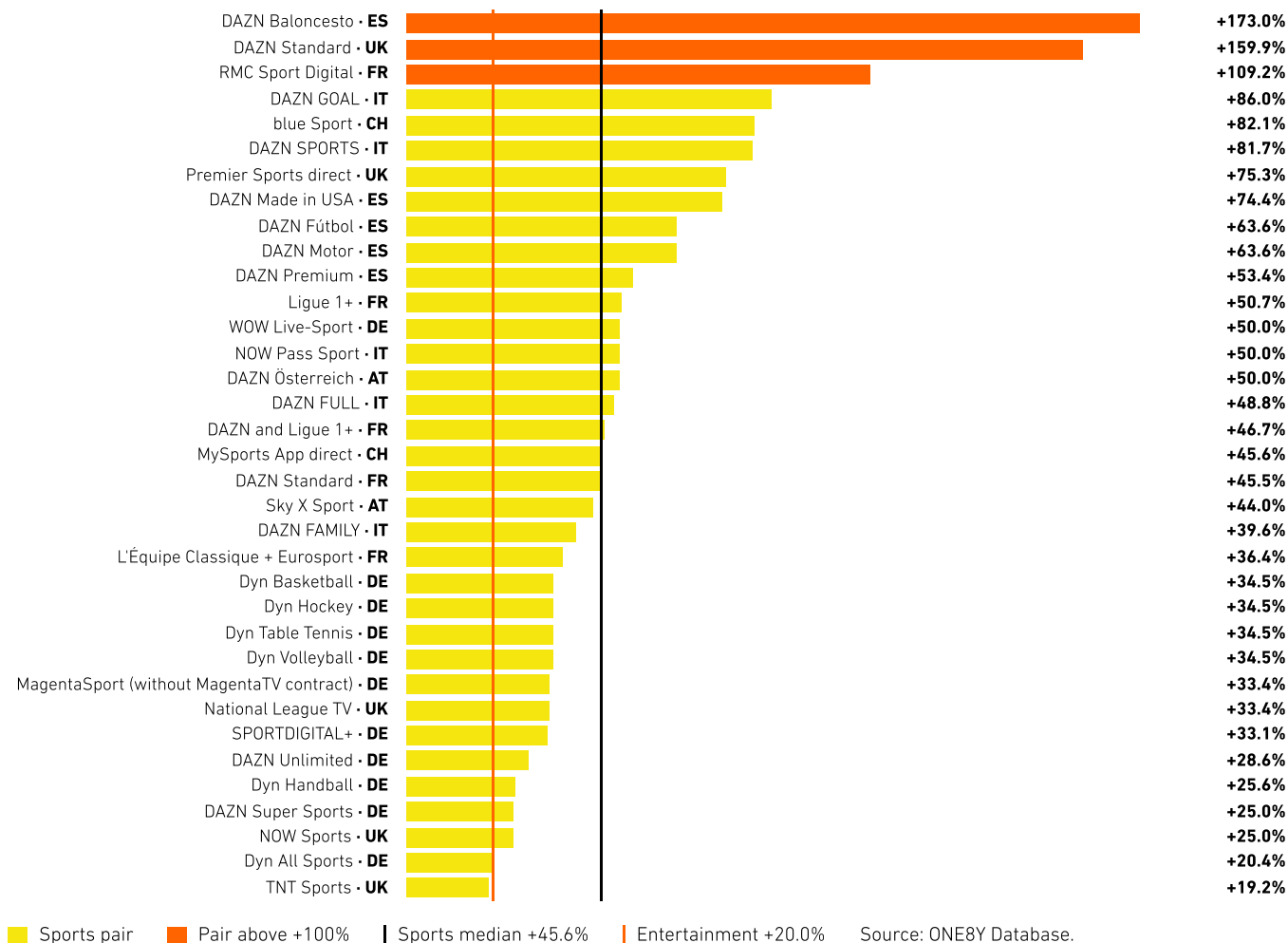
MEDIAN SURCHARGE FOR MONTHLY CANCELLATION, BY MARKET



TWO PRICE ARCHITECTURES

The comparison group shows what a pricing rule looks like: 14 of 15 entertainment pairs sit at exactly 20.0 per cent, the only exception being Amazon Prime UK. Sport has no such rule. Single pairs range from 19.2 to 173.0 per cent; 32 of 35 pairs lie at or below one hundred per cent and 3 above it. The premium is set product by product. It is a pricing decision that can be tested, not a structural constant of the market.

ALL 35 SPORTS PRICE PAIRS, RANKED · SURCHARGE FOR MONTHLY CANCELLATION



The 3 pairs above one hundred per cent are DAZN Baloncesto in Spain (+173.0 per cent), DAZN Standard in United Kingdom (+159.9 per cent) and RMC Sport Digital in France (+109.2 per cent). A plausible reading: for these products the annual price is the real offer, and the monthly price works as a signpost towards it rather than as a product in its own right.

ROBUSTNESS

The result does not depend on single cases. Without the 3 pairs whose surcharge exceeds one hundred per cent, the median is 44.7 per cent. Without Switzerland it is 45.5 per cent. The L'Équipe + Eurosport pair (+36.4 per cent) was admitted on 25 September 2026 because it meets the selection rule; without it the median is 46.1 per cent. Two documented pairs are excluded by rule: DAZN Ligue 1+ and SFR Ligue 1+ — the first is a second distribution route of the same Ligue 1+ product and would count it twice, the second requires a base contract whose cost is not documented.

The result does not depend on a single provider. DAZN accounts for 15 of the 35 pairs and Dyn for 6. Counting each provider once per market — 21 provider-market combinations — gives a median of 46.1 per cent, a factor of 2.30. Without DAZN and Dyn the median is 44.8 per cent. Removing DAZN alone lowers it to 34.5 per cent, because the German Dyn pairs then dominate the remaining sample; removing Dyn alone raises it to 50.0 per cent. Of the 20 pairs not sold by DAZN, 19 lie above the entertainment value.

HOW TO READ IT

The prices do not reveal why operators charge the premium. Three explanations are consistent with the data and none is proven by it: the sports calendar, which makes a monthly customer likely to leave in the off-season; the cost of acquiring a customer again; and the financing effect of committed revenue, which is the most plausible reading of the uniform entertainment value. Separating them requires customer cohorts, which no operator publishes.

→ FOR OPERATORS

A premium far above the market median is worth testing against a season-length product. The data here shows the price of flexibility, not the retention it buys.

→ FOR RIGHTS HOLDERS

The premium is part of what fans pay for access. It belongs in any model of how a package structure translates into consumer prices.

ALL SPORTS PAIRS

MARKET	PRODUCT	TWELVE-MONTH TERM	MONTHLY-CANCELLABLE, TWELVE MONTHS	PREMIUM
Germany	DAZN Super Sports	€239.88	€299.88	+25.0%
Germany	DAZN Unlimited	€419.88	€539.88	+28.6%
Germany	Dyn All Sports	€294.00	€354.00	+20.4%
Germany	Dyn Basketball	€174.00	€234.00	+34.5%
Germany	Dyn Handball	€234.00	€294.00	+25.6%
Germany	Dyn Hockey	€174.00	€234.00	+34.5%
Germany	Dyn Table Tennis	€174.00	€234.00	+34.5%
Germany	Dyn Volleyball	€174.00	€234.00	+34.5%
Germany	MagentaSport (without MagentaTV contract)	€179.40	€239.40	+33.4%
Germany	SPORTDIGITAL+	€44.99	€59.88	+33.1%
Germany	WOW Live-Sport	€359.88	€539.88	+50.0%
United Kingdom	DAZN Standard	£119.99	£311.88	+159.9%
United Kingdom	NOW Sports	£335.88	£419.88	+25.0%
United Kingdom	National League TV	£179.88	£239.88	+33.4%
United Kingdom	Premier Sports direct	£130.00	£227.88	+75.3%
United Kingdom	TNT Sports	£311.88	£371.88	+19.2%

MARKET	PRODUCT	TWELVE-MONTH TERM	MONTHLY-CANCELLABLE, TWELVE MONTHS	PREMIUM
France	DAZN Standard	€131.88	€191.88	+45.5%
France	DAZN and Ligue 1+	€229.00	€335.88	+46.7%
France	L'Équipe Classique + Eurosport	€131.88	€179.88	+36.4%
France	Ligue 1+	€199.00	€299.88	+50.7%
France	RMC Sport Digital	€109.00	€228.00	+109.2%
Italy	DAZN FAMILY	€619.00	€863.88	+39.6%
Italy	DAZN FULL	€379.00	€563.88	+48.8%
Italy	DAZN GOAL	€129.00	€239.88	+86.0%
Italy	DAZN SPORTS	€99.00	€179.88	+81.7%
Italy	NOW Pass Sport	€239.88	€359.88	+50.0%
Spain	DAZN Baloncesto	€65.89	€179.88	+173.0%
Spain	DAZN Fútbol	€219.99	€359.88	+63.6%
Spain	DAZN Made in USA	€54.99	€95.88	+74.4%
Spain	DAZN Motor	€219.99	€359.88	+63.6%
Spain	DAZN Premium	€351.99	€539.88	+53.4%
Switzerland	MySports App direct	CHF 328.90	CHF 478.80	+45.6%
Switzerland	blue Sport	CHF 328.80	CHF 598.80	+82.1%
Austria	DAZN Österreich	€239.88	€359.88	+50.0%
Austria	Sky X Sport	€300.00	€431.88	+44.0%

Twelve-month cost in local currency: annual prepayment where offered, otherwise twelve monthly payments on the respective term, with promotional months at the promotional price. Source: ONE8Y Database, which holds tariff details and sources for every pair. Dyn Hockey covers field hockey.

PRICES.

A standalone sports subscription costs between 19.95 and 42.17 euro a month at the market median, and the cheapest way in differs by a factor that no content difference explains on its own.

FINDING The cheapest monthly-cancellable standalone sports subscription ranges from €4.99 a month in Germany (SPORTDIGITAL+ Monthly Pass) to €31.60 in Switzerland.

LIMIT · The cheapest documented tariff in each market; often a niche or partial package, not full access.

The cheapest documented tariffs are niche or partial products: international football channels in Germany, a youth pass in France, a US-sports package in Spain. They set the floor for what a sports subscription can cost, not the price of the domestic league.

FINDING The median monthly-cancellable sports subscription costs between €19.95 (Germany) and €42.17 (Switzerland) a month.

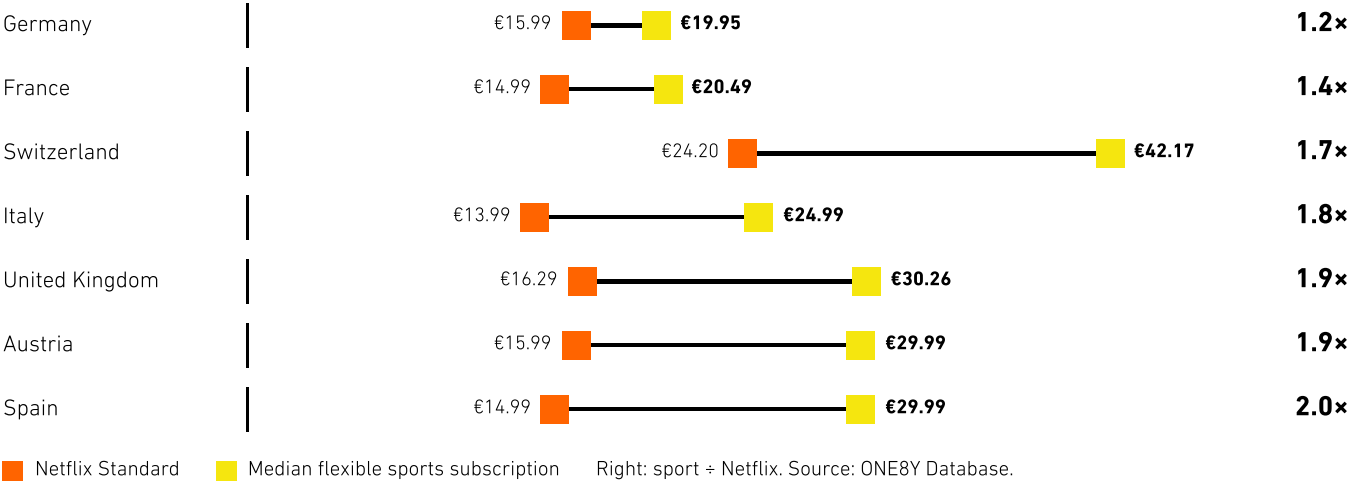
LIMIT · The median depends on the mix of documented tariffs; Switzerland and Austria rest on few tariffs.

FINDING Against Netflix Standard in the same market, the median flexible sports subscription costs 1.2 times as much in Germany and 2.0 times as much in Spain.

LIMIT · Netflix Standard is the same product in all seven markets; the sports value is a sample median.

Netflix Standard is the same product in all seven markets and serves as the anchor. In Germany the median sports subscription costs little more than Netflix; in Spain it costs twice as much. The anchor removes differences in general price levels; it does not remove differences in what the documented tariffs contain.

NETFLIX STANDARD ↔ MEDIAN FLEXIBLE SPORTS SUBSCRIPTION, € A MONTH



PROMOTIONS AND SPREAD

- FINDING** On the cut-off date, 40 per cent of core sports tariffs in Switzerland carried a promotion, against 6 per cent in Italy.

LIMIT · A snapshot at the start of the season; Switzerland rests on five core tariffs.
- FINDING** Within one market, the dearest flexible sports subscription costs up to 9.0 times the cheapest (Germany); the narrowest range is 1.7 times (Switzerland).

LIMIT · Depends on the cheapest documented niche offer.

Promotions are a season-start instrument. Across all markets 18 per cent of core tariffs carried a promotion on the cut-off date; the median promotion takes 26 per cent off the price during its term and saves 17 per cent of the first-year cost. Where promotions run, they are deep rather than broad: Switzerland combines the highest share of promotions with the deepest discount. For the fan the start of the season is the cheapest moment to sign up; for the operator it is the moment the year is sold.

COMMITMENT STRUCTURES

60 per cent of core tariffs require a term of at least twelve months, from 40 per cent in Switzerland to 67 per cent in the UK and Spain. 17 per cent offer an annual prepayment, most often in Spain (33 per cent) and not at all in Switzerland and Austria. In most markets the twelve-month term is the default and the monthly term the exception that the commitment premium makes expensive. Operators do not sell flexibility; they sell the year and charge for leaving it.

WHAT A SINGLE SPORT COSTS

Sport is not one product. Where an operator sells sports separately, the price of one sport against the full offer shows how the operator values its portfolio; the chapter Beyond football takes this up.

FINDING From the same provider, a partial package (one sport or a group of sports) costs 18 to 83 per cent of the full product; by provider, the median runs from 37 to 66 per cent.

LIMIT · Twelve pairs from four providers in three markets (Germany, Italy, Spain); flexible monthly prices.

Where providers split their offer by sport, pricing differs by provider: at Dyn a single sport costs most of the full product, while DAZN prices its partial packages lower relative to the full offer in Italy and Spain.

The two architectures serve different goals. Where a single sport costs more than half of the full product, as at Dyn, the upgrade to the full product is the easy sell. Where DAZN's entry tiers cost well under half of the full offer, the partial package is a door for the fan who follows one sport — and a competitor to the operator's own full product. For the fan interested in one sport, the partial package is the cheaper way in in every case documented here.

PRICE INDICATORS BY MARKET

MARKET	CORE TARIFFS	MEDIAN FLEXIBLE, €/MONTH	MEDIAN ON ANNUAL TERMS, €/MONTH	CHEAPEST FLEXIBLE, €/MONTH	IN PROMOTION	NETFLIX STANDARD, €/MONTH	SPORT ÷ NETFLIX
Germany	30	19.95	20.42	4.99	13%	15.99	1.2×
United Kingdom	15	30.26	21.44	22.11	13%	16.29	1.9×
France	20	20.49	18.32	13.99	35%	14.99	1.4×
Italy	17	24.99	27.42	14.99	6%	13.99	1.8×
Spain	15	29.99	16.66	7.99	13%	14.99	2.0×
Switzerland	5	42.17	28.96	31.60	40%	24.20	1.7×
Austria	6	29.99	19.99	8.99	17%	15.99	1.9×

Core tariffs are standalone pure sports subscriptions. "In promotion" is the share of core tariffs with a running promotion on the cut-off date. Source: ONE8Y Database. Medians on annual and flexible terms are computed over different sets of tariffs, since not every product is sold on both terms; the like-for-like comparison is the commitment premium, which uses matched pairs only.

ACCESS.

The example fan of this chapter follows football, the sport with the most documented rights and the most divided ones. Wanting the domestic league and the main European competitions, that fan buys two subscriptions in every market with a comparable route. The bill runs from 456 to 780 euro a year.

Football is the example, not the rule: it is the one sport for which a comparable need can be defined in all seven markets. The example routes price that need per market over twelve months, using standalone tariffs only. They are not a claim about the cheapest possible access and their scope differs: league plus a UEFA selection in Germany, Italy, France and Austria, the available live access to the Premier League in the UK, and football plus ice hockey in Switzerland, where the two anchor sports sit with different operators.

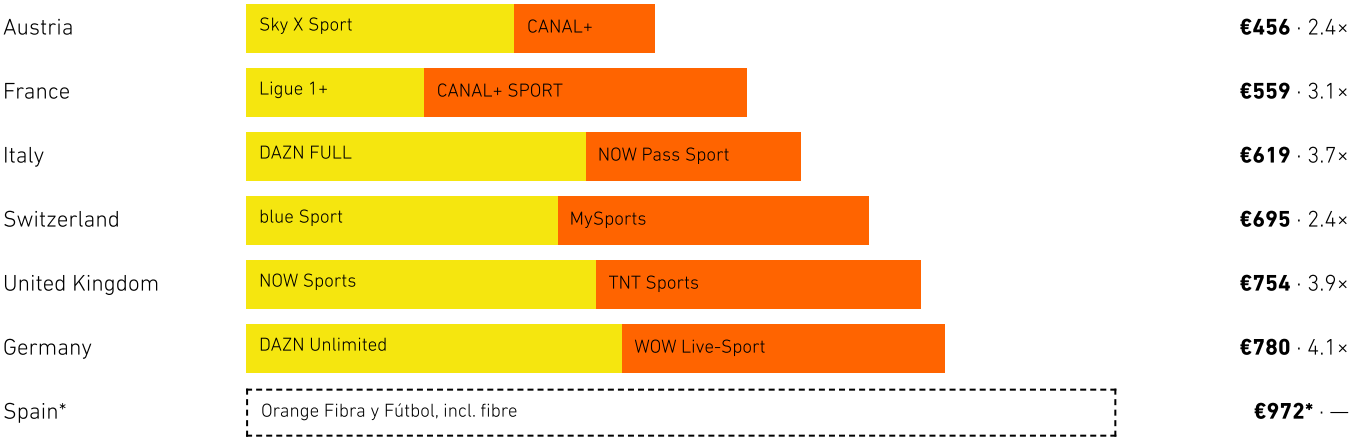
FINDING The documented example route for a football fan costs between €456 (Austria) and €780 (Germany) over twelve months; the scope of the route differs by market.

LIMIT · Example routes with different scope by market (league plus UEFA; football and ice hockey in Switzerland; available live access in the UK), not market averages. Converted at the rates of the cut-off date.

FINDING That is 2.4 to 4.1 times the cost of a year of Netflix Standard.

LIMIT · As for the example routes above; Spain is not in the comparison.

EXAMPLE ROUTE FOR A FOOTBALL FAN · THE TWO SUBSCRIPTIONS, TWELVE MONTHS, €



Subscription 1 Subscription 2

Right: total · x a year of Netflix. * Spain: only documented with fibre broadband, not comparable. Source: ONE8Y Database.

MARKET	ROUTE	TWELVE MONTHS, LOCAL	TWELVE MONTHS, €	× A YEAR OF NETFLIX
Germany	DAZN Unlimited annual term + WOW Live-Sport an- nual offer	EUR 779.76	780	4.1×
United Kingdom	NOW Sports 12-Month Saver (without Boost) + TNT Sports via HBO Max Saver	GBP 647.76	754	3.9×
France	Ligue 1+ annual prepayment + CANAL+ SPORT 24 months	EUR 558.88	559	3.1×
Italy	DAZN FULL annual prepayment + NOW Pass Sport annual offer	EUR 618.88	619	3.7×
Switzerland	blue Sport annual subscription + MySports App di- rect – annual offer	CHF 657.70	695	2.4×
Austria	Sky X Sport annual subscription + CANAL+ Kombi	EUR 455.88	456	2.4×

Static twelve-month comparison; broadband, licence fees, hardware and activation excluded. Source: ONE8Y Database.

The route cost is not driven by expensive subscriptions but by the number of them. In every market with a comparable route, the league and the main European competitions sit with different operators, so the fan buys two products that overlap in part and are priced as if each were the only one. The difference between the cheapest and the dearest route is 324 euro a year, and it tracks the package design more closely than the price level: Austria, with one pay partner for the whole league, has the cheapest route; Germany, with the most league partners, the dearest.

SPAIN: NO ROUTE WITHOUT A FIXED LINE

FINDING	In Spain, complete access to LaLiga and the UEFA club competitions was only documented with a fixed-line contract; the cheapest route costs €972 over twelve months including fibre broadband.
	LIMIT · The absence of a route without fixed line rests on operator pages and market overviews as of the confirmation date; the value includes broadband and is not comparable with the example routes in the other markets.

In Spain, the domestic league is split between DAZN and Telefónica, and the UEFA club competitions sit with Telefónica. Movistar sells its football packages only within a convergent fibre contract, and its standalone app shows one league match per matchday. DAZN alone carries half of the league matches and no UEFA club competition. The cheapest complete route documented is Orange Fibra y Fútbol at 81 euro a month including fibre broadband; the Movistar equivalent costs 117 euro. Because the broadband line is part of the price, Spain is shown separately and not ranked.

CAN FANS BUY SPORT WITHOUT A TELCO CONTRACT?

FINDING	The share of sports brands selling at least one sports tariff without a telco or TV contract runs from 55 per cent in France to 100 per cent in the UK, Switzerland and Austria.
	LIMIT · Small number of brands per market; classification per tariff documented in the ONE8Y Database.

FINDING	The share of brands selling a pure sports subscription without any other contract runs from 25 per cent in Spain to 100 per cent in Switzerland and Austria.
LIMIT	As for the previous finding; bundles with entertainment do not count as pure sports subscriptions.

Openness varies more than prices do. In Switzerland and Austria every documented sports brand sells a standalone sports subscription; in Spain only DAZN does, while Movistar and Orange tie full access to their networks.

Openness is not a question of whether telcos are present — Swiss telcos own the two main sports channels — but of whether they use sport to sell the network. In France and Spain telcos distribute sport to their own subscribers; in Switzerland they sell their channels to everyone. For rights holders the difference matters more than any single price: a right sold to a network-bound distributor reaches that network’s customers, a right sold to an open distributor reaches the market.

BEYOND FOOTBALL.

Football is the largest sport in every documented market and the majority sport in none of them except Austria. The other 60 per cent of live competitions are where sports subscriptions differ most from one another.

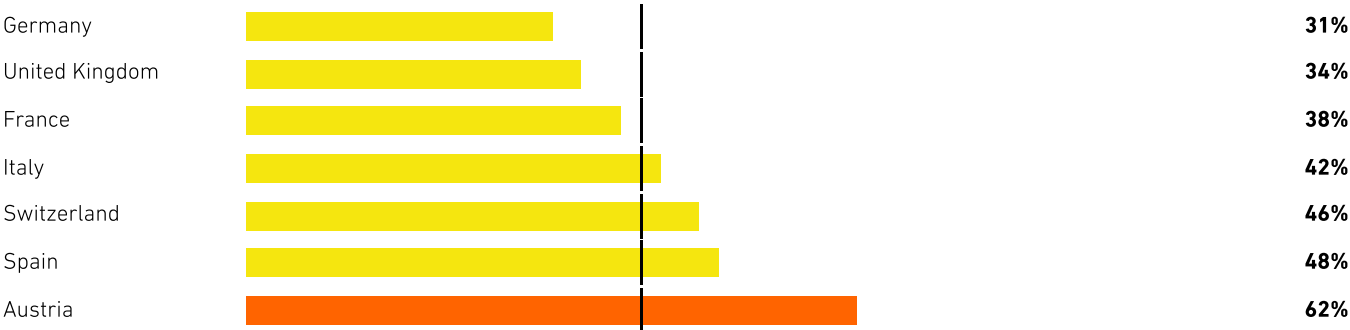
Of the 341 live competitions documented across the seven markets, 135 are football — 40 per cent. The next largest sports are Basketball (33), Motorsport (26), Tennis (22), Rugby (18) and Ice hockey (14), followed by boxing, cycling, handball and American football. The counts measure the depth of the documentation, not the size of the audience; a competition is counted once per market.

SPORT	LIVE COMPETITIONS (SEVEN MARKETS)	LIVE PARTNERS HOLDING THEM
Football	135	34
Basketball	33	10
Motorsport	26	8
Tennis	22	5
Rugby	18	9
Ice hockey	14	6
Boxing	13	3

Competitions counted once per market, so a league shown in three markets counts three times; women’s and youth competitions are counted with their sport. Partners are distinct normalised partners across all seven markets. Multi-sport events (Olympic Games and similar) are not assigned to a sport. Source: ONE8Y Database.

THE FOOTBALL SHARE BY MARKET

FOOTBALL SHARE OF DOCUMENTED LIVE COMPETITIONS



■ All seven markets 40% ■ Only market with a football majority Source: ONE8Y Database.

MARKET	COMPETITIONS	FOOTBALL	SHARE	SPORTS	LARGEST SPORTS AFTER FOOTBALL
Germany	86	27	31%	17	Basketball (10), Ice hockey (8) and Handball (7)
United Kingdom	61	21	34%	14	Rugby (8), Tennis (5) and Motorsport (4)
France	65	25	38%	14	Rugby (9), Basketball (6) and Cycling (5)
Italy	40	17	42%	9	Basketball (6), Motorsport (5) and Tennis (5)
Spain	42	20	48%	11	Basketball (6), Motorsport (4) and Tennis (3)
Switzerland	26	12	46%	8	Ice hockey (5), Motorsport (1) and Swiss wrestling (1)
Austria	21	13	62%	5	Motorsport (2), Skiing (1) and Handball (1)

Competitions counted once per market. Source: ONE8Y Database.

The share of football in the documented live rights runs from 31 per cent in Germany to 62 per cent in Austria. Germany has the broadest documented sports market: 17 sports, with Basketball (10), Ice hockey (8) and Handball (7) behind football, carried largely by specialised streamers. The UK’s second sport is rugby, France’s are rugby and cycling, Switzerland’s is ice hockey, and in Italy and Spain basketball, motorsport and tennis follow football at a distance.

WHERE SPORT IS SOLD BY THE SPORT

Most operators sell sport as one product. Where they split it by sport, the price ladder shows how they value the parts: from the same provider, a single sport or a group of sports costs 18 to 83 per cent of the full product, with provider medians from 37 to 66 per cent. Dyn in Germany prices handball, basketball, volleyball, table tennis and field hockey at most of its full price; DAZN prices its partial packages in Italy and Spain well below the full offer. For the fan of one sport the partial package is the cheaper way in in every case documented; for the operator it is either a step towards the full product or a competitor to it.

The specialised layer is where markets differ most. Germany has four streamers built around sports other than top-flight football — Dyn, sportdigital, Sporteuropa.TV and MagentaSport. The UK has Premier Sports with rugby and Scottish football, and DAZN with boxing and the National League. France sells cycling and rugby largely free-to-air and its second-tier sport through L’Équipe. Switzerland and Austria have no specialised streamer at all; their second sports sit with a telco channel (MySports) or with free-to-air television (ORF, ServusTV). Where no specialist exists, the second sport is either bundled into the main sports product or not sold as a subscription.

→ FOR OPERATORS

The partial package is the entry point for the fan of one sport. Price it against the full product deliberately — otherwise it either cannibalises the full offer or fails to convert.

→ FOR RIGHTS HOLDERS OUTSIDE FOOTBALL

The number of live partners for your sport is documented here by market. Where a specialised streamer exists, the sport has a buyer; where none exists, it competes for a slot in the main sports bundle.

RIGHTS AND MARKET STRUCTURE.

The same competition is sold market by market, and the number of buyers it is split between is a design decision of each rights holder.

FINDING	The domestic top flight is sold live through a single partner only in France; Germany has the most, with 3.
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FINDING	Only in Spain does a single broadcaster hold the UEFA Champions League; in every other market live rights are split between at least 2 partners.
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France is the exception on the league side: Ligue 1+ is the league's own product, distributed through partners but not sold to a rights buyer. Spain is the exception on the European side: Telefónica holds the UEFA club competitions alone in the current cycle.

Rights holders split packages to create competition between buyers. The access chapter shows what the split costs on the other side: the fan buys one subscription per buyer. How a rights holder weighs the two is a strategic choice, and the seven markets have made seven different ones.

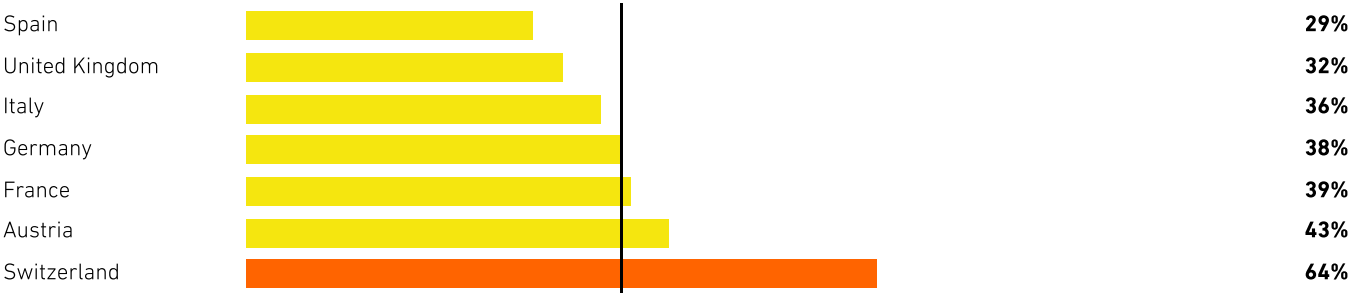
FINDING	A free-to-air broadcaster holds live rights to at least one match of the domestic top flight in Germany, Switzerland and Austria; in the UK, France, Italy and Spain no free-to-air broadcaster holds live league rights.
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LIMIT	The free-to-air scope ranges from single matches to a fixed package. Free streams offered by pay operators (such as one open DAZN match per round in Spain) are not counted as free-to-air.
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RENEWAL CALENDAR

FINDING	38 per cent of dated competition-partner contracts end by 2027; the share is highest in Switzerland (64 per cent).
	LIMIT · Counting unit is competition × partner; contracts without a documented end year are excluded.

SHARE OF DATED COMPETITION-PARTNER CONTRACTS ENDING BY 2027



| All seven markets 38% Source: ONE8Y Database.

A large share of the documented contracts is up for renewal within two seasons. The largest scheduled change is the UEFA club competition cycle from 2027/28, which has already been awarded in most markets.

The awards do not favour one type of buyer. A global platform enters: Paramount+ is preferred bidder for the Champions League in Germany and the UK. A streamer shifts: DAZN takes the Europa and Conference League in Germany and Switzerland and most Champions League matches in Austria, and gives up the Champions League in Germany. Incumbents consolidate: Sky Italia holds most Champions League matches and all other UEFA club football in Italy, CANAL+ all three competitions in France, Telefónica all of them in Spain. And several current holders drop out of European club football — RTL and Sky in Germany, Warner Bros. Discovery in the UK, ServusTV in Austria. Each market ends up with its own set of winners.

MARKET	UEFA CLUB COMPETITIONS FROM 2027/28	STATUS
Germany	Paramount+ named preferred bidder for the Champions League; Amazon Prime Video 19 exclusive Champions League matches per season; DAZN all 342 Europa and Conference League matches per season.	Paramount+: preferred bidder, final contract not published. Amazon and DAZN confirmed.
United Kingdom	Paramount+ named preferred bidder for the Champions League; Amazon keeps a first-pick match; Sky Sports all 342 Europa and Conference League matches per season.	Sky and Amazon confirmed; Paramount+ preferred bidder.
France	CANAL+ all three men's UEFA club competitions to 2030/31.	Confirmed.
Italy	Sky Italia 184 of 203 Champions League matches and all Europa and Conference League matches per season; Amazon 19 Champions League matches.	Confirmed.
Spain	Telefónica all UEFA club competitions, Super Cup and Youth League for €1,464m over four seasons.	Provisional award, subject to negotiation.
Switzerland	blue Sport keeps the Champions League; DAZN all 342 Europa and Conference League matches per season.	Confirmed.
Austria	DAZN 186 Champions League matches per season; Sky the Tuesday top match; PULS 4 the final and Super Cup free-to-air; CANAL+ all Europa and Conference League matches.	Confirmed.

Source: ONE8Y Database, based on the operators' own announcements. Future contracts are documented separately from the current cycle; none of them enters a finding on the current market.

FOREIGN LEAGUES

FINDING	Foreign top-five leagues are spread across up to 9 live partners in the UK; no other market has more than 4.
LIMIT	Includes free streaming and creator channels; the depth of documentation varies by market.

PART II

COUNTRY CHAPTERS.

KEY FIGURE · PART II

€324

between the cheapest fan route (Austria, €456) and the dearest (Germany, €780) over twelve months.

Each country chapter follows the same order: key figures, market structure, prices and the premium, access, what to watch, and the operator inventory from the ONE8Y Database.

The key figures use the same definitions in every chapter, so each value can be read against the other six markets. The inventory at the end of each chapter is not a ranking: the number of documented competitions reflects the depth of this research, not market share, and a partner listing evidences the partner rather than every match, window or exclusivity.

GERMANY.

Germany has the cheapest sports subscriptions in the study and, jointly with the UK, the lowest premium for flexibility. It also has the most expensive route for a football fan, because the Bundesliga is split between more live partners than any other league in the study.

COMMITMENT PREMIUM 33.4% 11 price pairs	MEDIAN FLEXIBLE, PER MONTH €19.95 Standalone pure sports subscription	SPORT ÷ NETFLIX 1.2× Median flexible vs. Netflix Standard	FAN ROUTE, TWELVE MONTHS €780 4.1× a year of Netflix
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KEY FIGURE	VALUE
Operators profiled	22
Live rights partners	14
Live competitions documented	86
Sports tariffs in the benchmark (core)	54 (30)
Sports Commitment Premium, median	33.4% (11 price pairs)
Median flexible sports subscription	€19.95 a month
Median on annual terms	€20.42 a month
Cheapest flexible sports subscription	€4.99 (SPORTDIGITAL+ Monthly Pass)
Median sport ÷ Netflix Standard	1.2×
Core tariffs in promotion on the cut-off date	13%
Example route for a football fan, twelve months	€780 (4.1× a year of Netflix)
Brands selling a pure sports subscription standalone	7 of 10 (70%)
Live partners: domestic top flight	DAZN, ProSiebenSat.1 and Sky
Live partners: Champions League	DAZN and Prime Video
Live partners: Europa and Conference League	RTL and Sky
Formula 1	Sky
Olympic Games	ARD / ZDF and Warner Bros. Discovery
Dated contracts ending by 2027	38%

Prices in euro at the rates of the cut-off date (18 September 2026). Definitions as in Part I. Source: ONE8Y Database.

MARKET STRUCTURE

Germany is the most deeply documented market in the study: 22 operator profiles, 14 live rights partners and 86 distinct live competitions. The Bundesliga is sold live through DAZN, ProSiebenSat.1 and Sky. The Champions League sits with DAZN and Prime Video, the Europa and Conference League with RTL and Sky, Formula 1 with Sky and the Olympic Games with ARD / ZDF and Warner Bros. Discovery.

The largest structural change of the year has already happened. Sky Deutschland has been part of RTL Group since 1 June 2026. RTL paid €68m in cash at closing — after working-capital and debt adjustments, against the €150m previously communicated — with a variable consideration capped at €377m, and targets €250m in annual synergies; the combined business reports around 12.3 million paying subscribers. Since the closing, both documented live partners of the Europa and Conference League, RTL and Sky, belong to one group. The Bundesliga split is unchanged: the transaction consolidated ownership, not the league's package design.

Beyond football, a layer of specialised streamers shapes the German market. Dyn holds 12 documented live competitions in handball, basketball, volleyball, table tennis and field hockey. sportdigital holds 11, mostly international football leagues. Sporteuropa.TV holds 10, built on international events and national leagues distributed on a revenue share. Telekom's MagentaSport adds 11, from the third division to basketball and ice hockey. Free-to-air television remains a live partner of football, with ARD / ZDF in 9 documented competitions and ProSiebenSat.1 holding single Bundesliga matches.

PRICES AND THE PREMIUM

The median flexible sports subscription costs €19.95 a month, 1.2 times Netflix Standard, the lowest ratio in the study. The range is the widest: the dearest flexible subscription costs 9.0 times the cheapest, from €4.99 for the SPORTDIGITAL+ Monthly Pass to €44.99. The floor is an international football channel, not the Bundesliga; for a domestic football fan the median is the relevant price.

Across 11 price pairs the premium for monthly cancellation is 33.4 per cent. The German pairs are tightly bunched: DAZN Super Sports at 25.0 per cent, DAZN Unlimited at 28.6, MagentaSport at 33.4, SPORTDIGITAL+ at 33.1 and Dyn between 20.4 and 34.5 per cent. WOW Live-Sport is the outlier at 50.0 per cent.

A plausible reading: with the Bundesliga split across three buyers, no single subscription is indispensable. A steep monthly premium would deter the sign-up before it could protect the renewal, so German operators compete on the annual price and keep the exit comparatively cheap. On the cut-off date 13 per cent of core tariffs carried a promotion, 57 per cent required a twelve-month term and 7 per cent offered an annual prepayment.

BEYOND FOOTBALL

Germany has the broadest documented sports market in the study: 17 sports and 86 live competitions, of which football is 31 per cent — the lowest share of the seven markets. Behind football stand Basketball (10), Ice hockey (8) and Handball (7). Four operators are built around sports other than top-flight football: Dyn (handball, basketball, volleyball, table tennis, field hockey), sportdigital (international football leagues), Sporteurope.TV (international events and national leagues) and MagentaSport (third division, basketball, ice hockey). Dyn prices a single sport at 66 to 83 per cent of its full product, which makes the step up to all sports the natural sale. Germany is the market where a sports subscription least resembles a football pass.

ACCESS

A fan who wants the complete Bundesliga and a selection of UEFA matches combines DAZN Unlimited annual term and WOW Live-Sport annual offer: €779.76 over twelve months, 4.1 times a year of Netflix Standard. Both values are the highest in the study. The cost is the price of the package design: the Bundesliga alone requires two subscriptions, because DAZN and Sky each hold part of the live matches.

Distribution is open. 9 of 10 sports brands (90 per cent) sell at least one sports tariff without a telco or TV contract, and 7 sell a pure sports subscription on its own; MagentaSport can be booked without a MagentaTV contract. In Germany the fan’s problem is the number of subscriptions, not the gate in front of them.

WHAT TO WATCH

The UEFA cycle from 2027/28 redraws the European layer. Paramount+ has been named preferred bidder for the Champions League, Amazon Prime Video keeps 19 exclusive Champions League matches per season, and DAZN takes all 342 Europa and Conference League matches. In the documented awards the RTL–Sky group holds neither UEFA club competition from 2027/28, and DAZN swaps the Champions League for the Europa and Conference League.

38 per cent of the dated competition–partner contracts in Germany end by 2027. For the RTL–Sky group, the consequence is that its value case rests on the Bundesliga and on distribution, not on the European competitions it holds today.

FOR DECISION-MAKERS

→ OPERATORS

Germany rewards the annual price, not the exit penalty. Compete on the twelve-month offer — otherwise the split league sends the fan to the cheaper half.

→ RIGHTS HOLDERS

The route of €780 a year is what a three-buyer design costs the fan. Price it before the next tender — otherwise the route cost becomes the argument against the next split.

Source: ONE8Y Database. The example route is a static twelve-month comparison, broadband and hardware excluded. The route is a documented example, not the cheapest possible access. UEFA awards from 2027/28: Paramount+ is preferred bidder, the final contract is not published.

10

OPERATOR INVENTORY · LIVE RIGHTS PARTNERS, CURRENT CONTRACTS

PARTNER	COUNT	DOCUMENTED LIVE COMPETITIONS (SELECTION)
DAZN	15	LaLiga; Ligue 1; Serie A; Bundesliga; NFL Game Pass International ...
Sky	12	Premier League; Formula 1; Bundesliga; MotoGP / Moto2 / Moto3; NFL ...
Dyn	12	BBL / BBL-Pokal; EHF Champions League Women; EHF Champions League Men; EHF European League Men/Women; Euro Hockey League ...
Telekom	11	3. Liga; Champions Hockey League; DEL; Deutschland Cup / ice hockey national teams; EuroCup ...
sportdigital	11	AFC Champions League Elite and Two; Barclays Womens Super League, Subway Players Cup; CONMEBOL Libertadores; Campeonato Brasileiro Série A; Eredivisie, KNVB Beker, NL-Supercup ...
Sporteurope.TV	10	US Open, current cycle; 2. Basketball-Bundesliga ProA and ProB; DEL2; GFL; IIHF World Championships Men ...
ARD / ZDF (free-to-air)	9	Olympic Games; DFB-Pokal; DFB-Pokal Women; DOSB package: 32 top sports federations; Deutschland Tour / Cycloclassics / selected ASO classics ...
RTL (free-to-air)	6	Premier League; NFL; UEFA Conference League; UEFA Europa League; 2. Bundesliga ...
Warner Bros. Discovery	6	Olympic Games; Australian Open; Roland-Garros; Tour de France / Tour Femmes / Vuelta / Vuelta Femenina / ASO-classics; FIA WEC / 24 Hours of Le Mans ...
ProSiebenSat.1 (free-to-air)	2	Bundesliga / 2. Bundesliga; DTM
Prime Video	2	NBA; UEFA Champions League
SPORT1 (free-to-air)	2	ADAC GT Masters / GT4 Germany; Frauen-Bundesliga
NBA	1	NBA League Pass
Disney+	1	UEFA Women's Champions League

Distinct competitions with current live rights per normalised partner in the ONE8Y Database (86 competitions in this market). A listing evidences the partner, not every match or window; highlights, resellers and aggregators are not counted.

SPORTS TARIFFS BY BRAND

BRAND	TARIFFS	ACCESS	CHEAPEST FLEXIBLE PURE SPORTS TARIFF, €/MONTH	CHEAPEST PURE SPORTS TARIFF ON ANNUAL TERMS, €/MONTH
DAZN	11	standalone	€9.99	€19.99
Dyn	14	standalone	€19.50	€14.50
HBO Max / TNT	4	add-on, standalone	—	—
Sky	3	standalone	—	€24.99
Sporteurope.TV	2	standalone	—	€34.08
Telekom	9	add-on, standalone	€19.95	€14.95
Vodafone	4	telco/TV bundle, add-on	—	—
WOW	3	add-on, standalone	€44.99	€29.99
sportdigital	2	standalone	€4.99	€3.75
waipu	2	standalone	—	—

Tariffs as documented in the price benchmark of the ONE8Y Database. The price columns refer to standalone pure sports subscriptions only; add-ons and telco bundles are listed without a price because their cost depends on a base contract.

UNITED KINGDOM.

The UK has the most expensive entry into sport of the seven markets relative to Netflix and, jointly with Germany, the lowest premium for flexibility. Its league cannot be bought complete at any price.

COMMITMENT PREMIUM 33.4% 5 price pairs	MEDIAN FLEXIBLE, PER MONTH €30.26 Standalone pure sports subscription	SPORT ÷ NETFLIX 1.9× Median flexible vs. Netflix Standard	FAN ROUTE, TWELVE MONTHS €754 3.9× a year of Netflix
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KEY FIGURE	VALUE
Operators profiled	18
Live rights partners	14
Live competitions documented	61
Sports tariffs in the benchmark (core)	28 (15)
Sports Commitment Premium, median	33.4% (5 price pairs)
Median flexible sports subscription	€30.26 a month
Median on annual terms	€21.44 a month
Cheapest flexible sports subscription	€22.11 (Premier Sports direct flexible)
Median sport ÷ Netflix Standard	1.9×
Core tariffs in promotion on the cut-off date	13%
Example route for a football fan, twelve months	€754 (3.9× a year of Netflix)
Brands selling a pure sports subscription standalone	5 of 6 (83%)
Live partners: domestic top flight	Sky and Warner Bros. Discovery
Live partners: Champions League	Prime Video and Warner Bros. Discovery
Live partners: Europa and Conference League	Warner Bros. Discovery
Formula 1	Sky
Olympic Games	BBC and Warner Bros. Discovery
Dated contracts ending by 2027	32%

Prices in euro, converted from pounds at the rates of the cut-off date (18 September 2026). Definitions as in Part I. Source: ONE8Y Database.

MARKET STRUCTURE

The ONE8Y Database holds 18 operator profiles, 14 live rights partners and 61 live competitions for the UK. The Premier League is sold live through Sky and Warner Bros. Discovery; the Saturday afternoon blackout means that no package shows every match. The Champions League sits with Prime Video and Warner Bros. Discovery, the Europa and Conference League with Warner Bros. Discovery, Formula 1 with Sky and the Olympic Games with BBC and Warner Bros. Discovery.

The market has two poles. Sky holds 18 and Warner Bros. Discovery 18 documented live competitions; DAZN (9) and Premier Sports (8) follow at a distance. Free-to-air television carries events, rugby, darts, snooker and women's football, with the BBC in 5 and ITV in 3 documented competitions, but no live Premier League match.

Sky agreed on 6 July 2026 to acquire ITV Media & Entertainment for up to £1.6bn, including £1.2bn in cash. The Competition and Markets Authority invited comments on 23 July 2026 and had not opened a formal investigation at that point; the transaction is announced, not completed. If it closes, the leading pay operator would own the leading commercial free-to-air broadcaster — the same combination of pay and free-to-air that RTL and Sky formed in Germany in June.

Foreign top-five leagues are spread across 9 live partners, more than in any other market, including free streaming and creator channels. For foreign-league rights holders the UK is the most competitive buyer market in the study; for fans it is the most fragmented.

PRICES AND THE PREMIUM

Sport has a high floor in the UK. The cheapest flexible sports subscription, Premier Sports direct flexible, costs €22.11 a month at the cut-off rate, 1.4 times Netflix Standard — the highest ratio of any market. The median flexible subscription costs €30.26, 1.9 times Netflix, and the range is narrow: the dearest flexible offer costs 1.8 times the cheapest. The UK has no cheap way in.

The UK premium of 33.4 per cent is the median of widely spread pairs. TNT Sports sits at 19.2 per cent, the lowest single pair in the study; NOW Sports at 25.0, National League TV at 33.4, Premier Sports at 75.3 and DAZN Standard at 159.9 per cent. The operators with the big football rights keep the exit cheap; the specialists price it high.

Commitment is the norm: 67 per cent of core tariffs require twelve months, and 13 per cent carried a promotion on the cut-off date.

BEYOND FOOTBALL

The UK has 14 documented sports and 61 live competitions; football is 34 per cent. Behind it stand Rugby (8), Tennis (5) and Motorsport (4). Rugby is the second sport of the market and split three ways: Warner Bros. Discovery holds the Premiership, Premier Sports the United Rugby Championship and the European cups, ITV the Six Nations free-to-air. Sky carries the widest portfolio beyond football — Formula 1, cricket, golf, tennis, darts, netball and rugby league — and Warner Bros. Discovery adds cycling, tennis Grand Slams, snooker and UFC. Boxing sits with DAZN. The UK fan of a second sport rarely needs a second operator; the fan of football does.

ACCESS

The documented live route to the Premier League combines NOW Sports 12-Month Saver (without Boost) and TNT Sports via HBO Max Saver: £647.76 over twelve months, or €754 at the rate of the cut-off date — 3.9 times a year of Netflix Standard. It buys the available live access, not every match.

Every documented sports brand sells without a telco contract (100 per cent), and 83 per cent sell a pure sports subscription. Distribution in the UK is open; it is the league’s blackout, not the distributors, that limits access.

WHAT TO WATCH

From 2027/28 Paramount+ is the preferred bidder for the Champions League and Amazon keeps a first-pick match; Sky Sports takes all 342 Europa and Conference League matches per season. In the documented awards Warner Bros. Discovery holds neither UEFA club competition from 2027/28, while Sky adds European club football to the Premier League and to Formula 1, which it renewed to 2034.

32 per cent of dated contracts end by 2027. The decision on Sky–ITV and the confirmation of the Paramount+ award will show whether the UK moves towards one integrated incumbent or towards platforms as the second pole.

FOR DECISION-MAKERS

→ OPERATORS

The UK fan already pays more than Netflix for the cheapest sports product. Compete on content and bundling, not on the entry price — otherwise the margin goes and the fan does not come.

→ RIGHTS HOLDERS

The UK is the most crowded buyer market for foreign leagues in the study. Use the competition for the rights — otherwise one of the many partners sets the price for all.

Prices converted from pounds at the rate of the cut-off date. Premier Sports: the current price is confirmed at the operator, the price on the cut-off date is not documented; without this pair the UK median premium is 29.2 per cent. The example route buys the available live access; the Saturday afternoon blackout remains. UEFA awards from 2027/28: Paramount+ is preferred bidder.

OPERATOR INVENTORY · LIVE RIGHTS PARTNERS, CURRENT CONTRACTS

PARTNER	COUNT	DOCUMENTED LIVE COMPETITIONS (SELECTION)
Sky	18	Bundesliga; Formula 1; Premier League; NFL; US Open ...
Warner Bros. Discovery	18	Premier League; MotoGP; Olympic Games; Australian Open; Roland-Garros ...
DAZN	9	Serie A; NFL Game Pass International; Frauen-Bundesliga; Liga Endesa / Copa del Rey / Supercopa Endesa; Matchroom Boxing ...
Premier Sports	8	LaLiga; EPCR Challenge Cup; Investec Champions Cup; LaLiga Hypermotion; Scottish Cup ...
BBC (free-to-air)	5	Bundesliga; Olympic Games; BBC snooker contract; Scottish Cup / Scottish FA Youth Cup Final; Women's Super League
Prime Video	3	Bundesliga; NBA; UEFA Champions League
ITV (free-to-air)	3	PDC ITV package; PREM Rugby; Six Nations Men
Disney+	2	LaLiga; UEFA Women's Champions League
Samsung TV Plus	1	Bundesliga
That's Football	1	Bundesliga
Vardy Party	1	Bundesliga
NBA	1	NBA League Pass
WSL	1	WSL2
Channel 4 (free-to-air)	1	Women's FA Cup

Distinct competitions with current live rights per normalised partner in the ONE8Y Database (61 competitions in this market). A listing evidences the partner, not every match or window; highlights, resellers and aggregators are not counted.

SPORTS TARIFFS BY BRAND

BRAND	TARIFFS	ACCESS	CHEAPEST FLEXIBLE PURE SPORTS TARIFF, €/MONTH	CHEAPEST PURE SPORTS TARIFF ON ANNUAL TERMS, €/MONTH
DAZN	5	standalone	€30.26	€11.64
HBO Max / TNT	8	standalone	€36.09	€30.26
NOW	5	add-on, standalone	€40.74	€32.59
National League TV	2	standalone	€23.28	€17.45
Premier Sports	6	add-on, standalone	€22.11	€12.61
Sky	2	add-on, standalone	—	—

Tariffs as documented in the price benchmark of the ONE8Y Database. The price columns refer to standalone pure sports subscriptions only; add-ons and telco bundles are listed without a price because their cost depends on a base contract.

FRANCE.

France is the test case for the league-owned model: its top flight is the only one in the study sold by the league itself. It also has the lowest share of sports brands that sell without a telco contract.

COMMITMENT PREMIUM 46.7% 5 price pairs	MEDIAN FLEXIBLE, PER MONTH €20.49 Standalone pure sports subscription	SPORT ÷ NETFLIX 1.4× Median flexible vs. Netflix Standard	FAN ROUTE, TWELVE MONTHS €559 3.1× a year of Netflix
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KEY FIGURE	VALUE
Operators profiled	19
Live rights partners	14
Live competitions documented	65
Sports tariffs in the benchmark (core)	41 (20)
Sports Commitment Premium, median	46.7% (5 price pairs)
Median flexible sports subscription	€20.49 a month
Median on annual terms	€18.32 a month
Cheapest flexible sports subscription	€13.99 (DAZN Pass Jeune)
Median sport ÷ Netflix Standard	1.4×
Core tariffs in promotion on the cut-off date	35%
Example route for a football fan, twelve months	€559 (3.1× a year of Netflix)
Brands selling a pure sports subscription standalone	6 of 11 (55%)
Live partners: domestic top flight	Ligue 1+
Live partners: Champions League	CANAL+ and M6
Live partners: Europa and Conference League	CANAL+
Formula 1	CANAL+
Olympic Games	EBU, France Télévisions and Warner Bros. Discovery
Dated contracts ending by 2027	39%

Prices in euro at the rates of the cut-off date (18 September 2026). Definitions as in Part I. Source: ONE8Y Database.

MARKET STRUCTURE

The ONE8Y Database holds 19 operator profiles, 14 live partners and 65 live competitions for France. Ligue 1 is sold live through a single partner, Ligue 1+, the league's own product, which other operators distribute. The Champions League sits with CANAL+ and M6, the Europa and Conference League with CANAL+, Formula 1 with CANAL+.

LFP reported 1.026 million Ligue 1+ subscribers on 15 September 2025, 72 per cent of them committed for the full season. A figure of 1.1 million was stated orally by the LFP Media chief executive on 25 February 2026. No official figure for the start of the 2026/27 season has been published — the number that would show whether the league-owned model scales is not yet public.

Around the league product, France has the largest number of sports brands in the study (11). DAZN holds 17 documented live competitions, beIN Sports 11 and CANAL+ 11. France Télévisions carries 10 competitions free-to-air, with cycling, rugby and the Olympic Games at its core.

The telcos Orange, SFR, Bouygues Telecom and Free, and the HBO Max sports option, sell sport only on top of another contract. That is why only 6 of 11 brands (55 per cent) sell a sports tariff without a telco or TV contract.

PRICES AND THE PREMIUM

Prices are compressed. The median flexible subscription costs €20.49, 1.4 times Netflix Standard. The dearest flexible offer costs €27.99, the lowest ceiling of the seven markets, and the range from the cheapest offer (DAZN Pass Jeune, €13.99) is 2.0 times.

France is a promotion market: 35 per cent of core tariffs carried a promotion on the cut-off date, the second-highest share after Switzerland. The season-start offers for DAZN and Ligue 1+ run in dated windows around the first matchdays; a fan who signs up outside them pays list price.

Across 5 pairs the median premium is 46.7 per cent: L'Équipe with Eurosport at 36.4, DAZN at 45.5, DAZN with Ligue 1+ at 46.7, Ligue 1+ direct at 50.7 and RMC Sport Digital at 109.2 per cent. The league's own product charges more for flexibility than the market median: the league prices the exit right like a pay operator.

BEYOND FOOTBALL

France has 14 documented sports and 65 live competitions; football is 38 per cent. Behind it stand Rugby (9), Basketball (6) and Cycling (5). Rugby and cycling are the second sports, and both are sold differently from football: the TOP 14 sits with CANAL+ on pay-TV while its final, the Six Nations and the European cups reach France Télévisions free-to-air, and the Tour de France is free-to-air on France Télévisions with Warner Bros. Discovery on the pay side. beIN Sports carries basketball (NBA, EuroLeague), handball (StarLigue) and US sports; CANAL+ holds Formula 1 and MotoGP. For the French fan of a second sport the free-to-air layer covers more than in any other market of the study.

ACCESS

The complete Ligue 1 plus the UEFA club competitions costs €558.88 in the first year: Ligue 1+ annual pre-payment at €199.00 and CANAL+ SPORT 24 months at €359.88, 3.1 times a year of Netflix Standard. The CANAL+ offer binds for twenty-four months, so the first year is not the full commitment.

WHAT TO WATCH

From 2027/28 CANAL+ holds all three men's UEFA club competitions to 2030/31, which consolidates the European layer in one pay operator. 39 per cent of dated contracts end by 2027. The decisive signal is an official Ligue 1+ subscriber figure for 2026/27 and its share of season-long subscriptions: it decides whether other leagues read France as a template or as a warning.

FOR DECISION-MAKERS

→ LEAGUES

Ligue 1+ is the only live test of a league selling its top flight itself. Read its subscriber and season-share figures before planning a direct product — otherwise the template is chosen before the evidence exists.

→ OPERATORS

In France the promotion window decides the sign-up. Plan the season start as the main sales event — otherwise the fan meets the list price and waits for the next window.

Ligue 1+ subscriber figures: LFP publication (15 September 2025) and an oral statement (25 February 2026); no official 2026/27 figure. The DAZN Ligue 1+ and SFR Ligue 1+ pairs are excluded from the index by rule (second distribution route of the same product; base contract required). CANAL+ route: first-year cost of a twenty-four-month contract.

OPERATOR INVENTORY · LIVE RIGHTS PARTNERS, CURRENT CONTRACTS

PARTNER	COUNT	DOCUMENTED LIVE COMPETITIONS (SELECTION)
DAZN	17	LaLiga; Serie A; NFL Game Pass International; Betclic ELITE; Copa del Rey ...
beIN Sports	11	Bundesliga; NBA; NFL / MLB / NHL; Carabao Cup; Coupe de France ...
CANAL+	11	Premier League; Formula 1; MotoGP / Moto2 / Moto3; UEFA Champions League; UEFA Conference League ...
France Télévisions (free-to-air)	10	Olympic Games; Tour de France / Tour de France Femmes; EPCR Challenge Cup; EPCR Champions Cup; Flèche Wallonne / Liège–Bastogne–Liège Men and Women ...
Warner Bros. Discovery	6	Olympic Games; Australian Open; ATP Masters 1000; FIA WEC / 24 Hours of Le Mans; Vuelta / Vuelta Femenina / Volta a Catalunya ...
RMC Sport	4	World Judo Tour (Grand Slams / WM) / Judo Pro League; PFL / Cage Warriors / KSW / Hexagone MMA; UFC; Zuffa Boxing
Disney+	2	LaLiga; UEFA Women's Champions League
Ligue 1+	2	Ligue 1; Ligue 3
M6 (free-to-air)	2	UEFA Champions League – final; France women's national team – selected matches
Prime Video	1	NBA
NBA	1	NBA League Pass
EBU	1	Olympic Games
LFFP	1	Arkema Première Ligue
TF1 (free-to-air)	1	Nations Championship

Distinct competitions with current live rights per normalised partner in the ONE8Y Database (65 competitions in this market). A listing evidences the partner, not every match or window; highlights, resellers and aggregators are not counted.

SPORTS TARIFFS BY BRAND

BRAND	TARIFFS	ACCESS	CHEAPEST FLEXIBLE PURE SPORTS TARIFF, €/MONTH	CHEAPEST PURE SPORTS TARIFF ON ANNUAL TERMS, €/MONTH
Bouygues	1	add-on	—	—
CANAL+	3	add-on, standalone	—	€29.99
DAZN	10	standalone	€13.99	€10.99
Free	2	telco/TV bundle	—	—
HBO Max / TNT	6	add-on	—	—
L'Équipe	2	standalone	€14.99	€10.99
Ligue 1+	4	standalone	€24.99	€16.58
Orange	1	add-on	—	—
RMC Sport	4	add-on, standalone	€25.00	€9.08
SFR	4	add-on	—	—
beIN	4	add-on, standalone	€15.00	—

Tariffs as documented in the price benchmark of the ONE8Y Database. The price columns refer to standalone pure sports subscriptions only; add-ons and telco bundles are listed without a price because their cost depends on a base contract.

ITALY.

Italy sells sport at list price. It has the highest price ceiling and the lowest share of promotions in the study, and DAZN's tiering produces some of the steepest premiums for flexibility.

COMMITMENT PREMIUM 50.0% 5 price pairs	MEDIAN FLEXIBLE, PER MONTH €24.99 Standalone pure sports subscription	SPORT ÷ NETFLIX 1.8× Median flexible vs. Netflix Standard	FAN ROUTE, TWELVE MONTHS €619 3.7× a year of Netflix
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KEY FIGURE	VALUE
Operators profiled	12
Live rights partners	8
Live competitions documented	40
Sports tariffs in the benchmark (core)	30 (17)
Sports Commitment Premium, median	50.0% (5 price pairs)
Median flexible sports subscription	€24.99 a month
Median on annual terms	€27.42 a month
Cheapest flexible sports subscription	€14.99 (DAZN SPORTS flexible)
Median sport ÷ Netflix Standard	1.8×
Core tariffs in promotion on the cut-off date	6%
Example route for a football fan, twelve months	€619 (3.7× a year of Netflix)
Brands selling a pure sports subscription standalone	2 of 5 (40%)
Live partners: domestic top flight	DAZN and Sky
Live partners: Champions League	Prime Video and Sky
Live partners: Europa and Conference League	Sky
Formula 1	Sky
Olympic Games	RAI and Warner Bros. Discovery
Dated contracts ending by 2027	36%

Prices in euro at the rates of the cut-off date (18 September 2026). Definitions as in Part I. Source: ONE8Y Database.

MARKET STRUCTURE

The ONE8Y Database holds 12 operator profiles, 8 live partners and 40 live competitions for Italy. Serie A is sold live through DAZN and Sky. The Champions League sits with Prime Video and Sky, the Europa and Conference League with Sky, Formula 1 with Sky, which renewed it to 2032, and the Olympic Games with RAI and Warner Bros. Discovery.

Italy is a two-operator market. Sky holds 17 documented live competitions and DAZN 12; the next pay operator, Warner Bros. Discovery, holds 6. No free-to-air broadcaster holds live rights to Serie A; Mediaset carries the Coppa Italia and the Supercoppa, RAI the Olympic Games, women's Serie A and sailing.

PRICES AND THE PREMIUM

The median flexible subscription costs €24.99, 1.8 times Netflix Standard, which at €13.99 is the cheapest Netflix in the study. The dearest flexible offer, €71.99, is the highest ceiling of the seven markets. Only 6 per cent of core tariffs carried a promotion on the cut-off date, and 29 per cent offered an annual prepayment.

Across 5 pairs the median premium is 50.0 per cent. DAZN's entry tiers carry the steepest premiums: DAZN GOAL at 86.0 and DAZN SPORTS at 81.7 per cent, against 48.8 for DAZN FULL and 39.6 for DAZN FAMILY. NOW Pass Sport sits at 50.0 per cent.

The partial packages are cheap relative to the full product: on flexible terms DAZN SPORTS costs 32 per cent and DAZN GOAL 43 per cent of DAZN FULL. They are expensive to hold monthly. The effect of the design is to steer the fan towards the full product on annual terms.

BEYOND FOOTBALL

Italy has 9 documented sports and 40 live competitions; football is 42 per cent. Behind it stand Basketball (6), Motorsport (5) and Tennis (5). Sky carries almost all of them: Formula 1 and MotoGP, the ATP and WTA tours with Wimbledon, EuroLeague basketball and Superbike sit in the same product as Serie A and the UEFA competitions. DAZN's second sports are basketball and boxing; Warner Bros. Discovery holds the tennis Grand Slams, cycling and snooker. Italy is the market where one operator comes closest to selling all of sport in one subscription — at the highest price ceiling in the study.

ACCESS

Serie A complete plus a UEFA selection combines DAZN FULL annual prepayment (€379.00) and NOW Pass Sport annual offer (€239.88): €618.88 over twelve months, 3.7 times a year of Netflix Standard. 4 of 5 sports brands sell without a telco contract; the exception is TIM's TIMVISION, which sells sport inside its own packages.

WHAT TO WATCH

From 2027/28 Sky Italia holds 184 of 203 Champions League matches and all Europa and Conference League matches per season; Amazon shows 19 Champions League matches. The two operators divide the market along competitions: the league with both, European football and Formula 1 with Sky. 36 per cent of dated contracts end by 2027, and the next Serie A cycle is the test of whether a telco enters as distributor, as Telefónica did in Spain.

FOR DECISION-MAKERS

→ OPERATORS	→ RIGHTS HOLDERS
The Italian fan pays list price for the most expensive offers in the study. Test promotions at the season start — otherwise the price ceiling protects margin but not reach.	Serie A sits with two operators who also divide European football. Model the next tender for a distributor — otherwise the two-operator market is simply renewed.

Source: ONE8Y Database. DAZN tier shares on flexible monthly prices. Example route: DAZN FULL annual prepayment plus NOW Pass Sport annual offer; individual UEFA windows are not complete access. UEFA awards from 2027/28 as announced by the operators.

OPERATOR INVENTORY · LIVE RIGHTS PARTNERS, CURRENT CONTRACTS

PARTNER	COUNT	DOCUMENTED LIVE COMPETITIONS (SELECTION)
Sky	17	Bundesliga; Ligue 1; Premier League; Formula 1; Serie A ...
DAZN	12	LaLiga; Serie A; NFL Game Pass International; Frauen-Bundesliga; LaLiga Hypermotion ...
Warner Bros. Discovery	6	Olympic Games; Australian Open; Roland-Garros; Tour de France / Tour Femmes / Vuelta / Vuelta Femenina / ASO-classics; FIA WEC / 24 Hours of Le Mans ...
RAI (free-to-air)	3	Olympic Games; 38th America's Cup incl. preliminary regattas, Youth and Women's; Serie A Women
Prime Video	2	NBA; UEFA Champions League
Mediaset (free-to-air)	2	Coppa Italia; Supercoppa Italiana
NBA	1	NBA League Pass
Disney+	1	UEFA Women's Champions League

Distinct competitions with current live rights per normalised partner in the ONE8Y Database (40 competitions in this market). A listing evidences the partner, not every match or window; highlights, resellers and aggregators are not counted.

SPORTS TARIFFS BY BRAND

BRAND	TARIFFS	ACCESS	CHEAPEST FLEXIBLE PURE SPORTS TARIFF, €/MONTH	CHEAPEST PURE SPORTS TARIFF ON ANNUAL TERMS, €/MONTH
DAZN	17	add-on, standalone	€14.99	€8.25
HBO Max / TNT	3	standalone	—	—
NOW	5	add-on, standalone	€29.99	€19.99
Sky	3	standalone	—	—
TIMVISION	2	telco/TV bundle, add-on	—	—

Tariffs as documented in the price benchmark of the ONE8Y Database. The price columns refer to standalone pure sports subscriptions only; add-ons and telco bundles are listed without a price because their cost depends on a base contract.

SPAIN.

Spain sells football through the network. Complete access to LaLiga and the UEFA club competitions was documented only with a fixed-line contract, and only 1 of 4 sports brands sells a pure sports subscription on its own.

COMMITMENT PREMIUM 63.6% 5 price pairs	MEDIAN FLEXIBLE, PER MONTH €29.99 Standalone pure sports subscription	SPORT ÷ NETFLIX 2.0× Median flexible vs. Netflix Standard	FAN ROUTE, TWELVE MONTHS €972* Including fibre broadband, not comparable
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KEY FIGURE	VALUE
Operators profiled	12
Live rights partners	8
Live competitions documented	42
Sports tariffs in the benchmark (core)	26 (15)
Sports Commitment Premium, median	63.6% (5 price pairs)
Median flexible sports subscription	€29.99 a month
Median on annual terms	€16.66 a month
Cheapest flexible sports subscription	€7.99 (DAZN Made in USA flexible)
Median sport ÷ Netflix Standard	2.0×
Core tariffs in promotion on the cut-off date	13%
Example route for a football fan, twelve months	€972 including fibre broadband (not comparable)
Brands selling a pure sports subscription standalone	1 of 4 (25%)
Live partners: domestic top flight	DAZN and Telefónica / Movistar
Live partners: Champions League	Telefónica / Movistar
Live partners: Europa and Conference League	Telefónica / Movistar
Formula 1	DAZN
Olympic Games	RTVE and Warner Bros. Discovery
Dated contracts ending by 2027	29%

Prices in euro at the rates of the cut-off date (18 September 2026). Definitions as in Part I. Source: ONE8Y Database.

MARKET STRUCTURE

The ONE8Y Database holds 12 operator profiles, 8 live partners and 42 live competitions for Spain. LaLiga is sold live through DAZN and Telefónica / Movistar. The Champions League and the Europa and Conference League sit only with Telefónica / Movistar — Spain is the only market in the study where one broadcaster holds the Champions League. Formula 1 is with DAZN, the Olympic Games with RTVE and Warner Bros. Discovery.

DAZN is the broadest pay operator in Spain with 21 documented live competitions, against 10 for Telefónica / Movistar. The two football operators are also each other's business partners. On 14 September 2026 Telefónica agreed to distribute DAZN's five LaLiga matches per matchday non-exclusively for 2027/28 to 2031/32, at an average of €330m per season, filed with the CNMV on 15 September 2026. The rights buyer becomes a wholesale supplier; the network owns the customer.

PRICES AND THE PREMIUM

Spain has the cheapest annual terms in the study — the median monthly value on annual terms is €16.66 — and the second-highest premium for leaving: 63.6 per cent across 5 DAZN pairs, behind Switzerland. The median flexible subscription costs €29.99, 2.0 times Netflix Standard, the highest ratio in the study.

The premium runs from 53.4 per cent for DAZN Premium to 173.0 per cent for DAZN Baloncesto, the highest single pair in the study; DAZN Fútbol and DAZN Motor both sit at 63.6 per cent. On flexible terms DAZN prices its partial packages at 18 to 67 per cent of DAZN Premium.

Spain sells the year and penalises the month: 67 per cent of core tariffs require twelve months and 33 per cent offer an annual prepayment, the highest share in the study.

BEYOND FOOTBALL

Spain has 11 documented sports and 42 live competitions; football is 48 per cent. Behind it stand Basketball (6), Motorsport (4) and Tennis (3). DAZN holds Formula 1 and MotoGP and sells them as a separate motor-sport package, alongside basketball (NBA, Liga Endesa) and US sports; Telefónica / Movistar carries EuroLeague basketball, the ATP Masters 1000, golf, padel and rugby inside its convergent packages. The premium for flexibility is highest in DAZN's non-football packages: 173.0 per cent for basketball, the highest single pair in the study.

ACCESS

Movistar sells its football packages only within a convergent fibre contract; its standalone app shows one LaLiga match per matchday. DAZN alone carries half of the league matches and no UEFA club competition. The cheapest complete route is Orange Fibra y Fútbol at €81 a month including fibre broadband, €972 over twelve months; the Movistar equivalent costs €117 a month. Because the broadband line is part of the price, Spain is not ranked against the other markets.

3 of 4 sports brands sell some sports tariff without a telco contract, but only DAZN sells a pure sports subscription on its own. In Spain the network is the gate: the question is not which subscription the fan buys, but which fibre line.

WHAT TO WATCH

Telefónica has been provisionally awarded all UEFA club competitions, the Super Cup and the Youth League from 2027/28 for €1,464m over four seasons, subject to negotiation. Together with the DAZN agreement, Telefónica would hold or distribute every LaLiga match and all UEFA club football from 2027/28 — the aggregator order of the scenarios in its clearest form.

Spain also has the lowest share of contracts ending by 2027 (29 per cent): the structure for the next cycle is largely set.

FOR DECISION-MAKERS

→ TELCOS

Telefónica pays for the distribution position, not only for rights. Price the customer relationship as an asset — otherwise the wholesale deal looks like a cost rather than the strategy.

→ OPERATORS WITHOUT A NETWORK

In Spain the fixed line is the gate to complete football. Secure distribution on a telco network — otherwise the product stays a partial offer.

The absence of a route without a fixed line rests on operator pages and market overviews as of 25 September 2026. The Spanish route includes fibre broadband and is not comparable with the other example routes. All five Spanish index pairs are DAZN products. The Telefónica UEFA award is provisional.

OPERATOR INVENTORY · LIVE RIGHTS PARTNERS, CURRENT CONTRACTS

PARTNER	COUNT	DOCUMENTED LIVE COMPETITIONS (SELECTION)
DAZN	21	Bundesliga; Ligue 1; Premier League; Serie A; Formula 1 ...
Telefónica / Movistar	10	LaLiga; UEFA Champions League; UEFA Conference League; UEFA Europa League; ATP Masters 1000 ...
RTVE (free-to-air)	6	Olympic Games; Copa del Rey; Liga F; Liga Prime Futsal; Primera Iberdrola Fútbol Sala ...
Warner Bros. Discovery	6	Olympic Games; Australian Open; Roland-Garros; Tour de France / Tour Femmes / Vuelta / Vuelta Femenina / ASO-classics; FIA WEC / 24 Hours of Le Mans ...
Prime Video	1	NBA
NBA	1	NBA League Pass
Disney+	1	UEFA Women's Champions League
3Cat	1	Liga F

Distinct competitions with current live rights per normalised partner in the ONE8Y Database (42 competitions in this market). A listing evidences the partner, not every match or window; highlights, resellers and aggregators are not counted.

SPORTS TARIFFS BY BRAND

BRAND	TARIFFS	ACCESS	CHEAPEST FLEXIBLE PURE SPORTS TARIFF, €/MONTH	CHEAPEST PURE SPORTS TARIFF ON ANNUAL TERMS, €/MONTH
DAZN	16	standalone	€7.99	€4.58
HBO Max / TNT	2	standalone	—	—
Movistar	6	telco/TV bundle, standalone	—	—
Orange	2	telco/TV bundle	—	—

Tariffs as documented in the price benchmark of the ONE8Y Database. The price columns refer to standalone pure sports subscriptions only; add-ons and telco bundles are listed without a price because their cost depends on a base contract.

SWITZERLAND.

Switzerland is the most expensive market in the study and one of the most open: every sports brand sells standalone, yet the fan pays the highest prices and the highest premium for flexibility — and follows two anchor sports sold by two different operators.

COMMITMENT PREMIUM 63.8% 2 price pairs	MEDIAN FLEXIBLE, PER MONTH €42.17 Standalone pure sports subscription	SPORT ÷ NETFLIX 1.7× Median flexible vs. Netflix Standard	FAN ROUTE, TWELVE MONTHS €695 2.4× a year of Netflix
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KEY FIGURE	VALUE
Operators profiled	18
Live rights partners	8
Live competitions documented	26
Sports tariffs in the benchmark (core)	7 (5)
Sports Commitment Premium, median	63.8% (2 price pairs)
Median flexible sports subscription	€42.17 a month
Median on annual terms	€28.96 a month
Cheapest flexible sports subscription	€31.60 (Sky Sport direct)
Median sport ÷ Netflix Standard	1.7×
Core tariffs in promotion on the cut-off date	40%
Example route for a football fan, twelve months	€695 (2.4× a year of Netflix)
Brands selling a pure sports subscription standalone	3 of 3 (100%)
Live partners: domestic top flight	SRG SSR and Swisscom / blue
Live partners: Champions League	SRG SSR and Swisscom / blue
Live partners: Europa and Conference League	SRG SSR and Swisscom / blue
Formula 1	Sky
Olympic Games	SRG SSR
Dated contracts ending by 2027	64%

Prices in euro, converted from francs at the rates of the cut-off date (18 September 2026). Definitions as in Part I. Source: ONE8Y Database.

MARKET STRUCTURE

The ONE8Y Database holds 18 operator profiles, 8 live partners and 26 live competitions for Switzerland. Football is sold live through SRG SSR and Swisscom / blue, and the same two partners hold the Champions League and the Europa and Conference League. Ice hockey, the second anchor sport, sits with Sunrise / MySports, whose National League contract runs 2027/28 to 2034/35. Formula 1 is with Sky.

The public broadcaster SRG SSR holds live rights in 9 documented competitions, more than any pay operator in Switzerland, including the Super League, the Olympic Games, skiing and national-team ice hockey. On the pay side, two telcos own the sports channels: Swisscom owns blue Sport, Sunrise owns MySports. Both sell them as standalone apps as well as inside their TV products.

PRICES AND THE PREMIUM

At the cut-off rate, the median flexible sports subscription costs €42.17 a month and the median monthly value on annual terms €28.96 — both the highest in the study. Netflix Standard is expensive too (€24.20), so the ratio of 1.7 is mid-table: Swiss sport is dear in absolute terms, not relative to Swiss prices. The range is the narrowest in the study at 1.7 times; even the cheapest flexible offer, Sky Sport direct, costs €31.60.

40 per cent of core tariffs carried a promotion on the cut-off date, the highest share in the study, and the median promotion takes 71 per cent off the price during its term, against 26 per cent across all markets. Switzerland prices high and discounts hard at the start of the season.

The two index pairs are MySports App direct at 45.6 per cent and blue Sport at 82.1 per cent; the market median of 63.8 per cent is the highest in the study.

BEYOND FOOTBALL

Switzerland has 8 documented sports and 26 live competitions; football is 46 per cent. Behind it stand Ice hockey (5), Motorsport (1) and Swiss wrestling (1). Ice hockey is the second anchor sport and the one that defines the Swiss fan route: the National League sits with Sunrise / MySports from 2027/28 to 2034/35, separate from football at blue and SRG SSR. Skiing, the Spengler Cup and the national ice hockey teams are free-to-air on SRG SSR; Formula 1, tennis and golf sit with Sky. Switzerland has no specialised sports streamer; its second sport is sold by a telco.

ACCESS

A fan of football and ice hockey combines blue Sport annual subscription (CHF 328.80) and MySports App direct – annual offer (CHF 328.90): CHF 657.70 over twelve months, or €695 at the cut-off rate. Measured against a year of Swiss Netflix this is 2.4 times, jointly with Austria the lowest ratio in the study. The blue Sport price in the route is a season-start offer that ended shortly after the cut-off date.

Every documented sports brand sells a pure sports subscription on its own (100 per cent). Swiss telcos own the channels but do not lock them behind their networks.

WHAT TO WATCH

64 per cent of dated contracts end by 2027, the highest share in the study. From 2027/28 blue Sport keeps the Champions League and DAZN takes all 342 Europa and Conference League matches per season, so the European layer is split between a telco channel and a streamer. The ice hockey contract with MySports is fixed to the middle of the next decade.

FOR DECISION-MAKERS

→ **OPERATORS**

Swiss fans accept high list prices but sign up in the promotion window. Plan the season start as the price event — otherwise the high list price only shows up in churn.

→ **RIGHTS HOLDERS**

The renewal share is the highest in the study. Use the tender to define the fan route across football and ice hockey — otherwise two operators keep selling two halves of one fan.

Prices converted from francs at the rate of the cut-off date. The Swiss premium rests on two price pairs and is directional; core-tariff shares rest on 5 core tariffs. UEFA awards from 2027/28 as announced by the operators.

OPERATOR INVENTORY · LIVE RIGHTS PARTNERS, CURRENT CONTRACTS

PARTNER	COUNT	DOCUMENTED LIVE COMPETITIONS (SELECTION)
SRG SSR (free-to-air)	9	Super League; Olympic Games from Milano Cortina 2026 to 2032; UEFA Champions League; UEFA Europa/Conference League; Federal Wrestling and Alpine Festival, wreath festivals ...
Swisscom / blue	6	Brack Super League; UEFA Champions League; UEFA Conference League; UEFA Europa League; EuroLeague ...
Sky	5	Bundesliga Germany; Premier League; Serie A; Formula 1; ATP/WTa, Golf, UFC, NFL
Sunrise / MySports	3	Champions Hockey League; NHL; National League
DAZN	2	Bundesliga Germany; Serie A and Ligue 1
swiss unihockey Hub; SRF	1	L-UPL Men and Women; selected play-off matches on SRF
RED+	1	Quickline Handball League / Swiss Premium League / NLB / youth
swissleague.tv	1	Swiss League

Distinct competitions with current live rights per normalised partner in the ONE8Y Database (26 competitions in this market). A listing evidences the partner, not every match or window; highlights, resellers and aggregators are not counted.

SPORTS TARIFFS BY BRAND

BRAND	TARIFFS	ACCESS	CHEAPEST FLEXIBLE PURE SPORTS TARIFF, €/MONTH	CHEAPEST PURE SPORTS TARIFF ON ANNUAL TERMS, €/MONTH
MySports	4	add-on, standalone	€42.17	€28.97
Sky	1	standalone	€31.60	—
blue Sport	2	standalone	€52.74	€28.96

Tariffs as documented in the price benchmark of the ONE8Y Database. The price columns refer to standalone pure sports subscriptions only; add-ons and telco bundles are listed without a price because their cost depends on a base contract.

AUSTRIA.

Austria is the cheapest route to top-flight football in the study: the league and the top European match cost a fan €456 a year, against €780 next door in Germany.

COMMITMENT PREMIUM 47.0% 2 price pairs	MEDIAN FLEXIBLE, PER MONTH €29.99 Standalone pure sports subscription	SPORT ÷ NETFLIX 1.9× Median flexible vs. Netflix Standard	FAN ROUTE, TWELVE MONTHS €456 2.4× a year of Netflix
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KEY FIGURE	VALUE
Operators profiled	17
Live rights partners	9
Live competitions documented	21
Sports tariffs in the benchmark (core)	6 (6)
Sports Commitment Premium, median	47.0% (2 price pairs)
Median flexible sports subscription	€29.99 a month
Median on annual terms	€19.99 a month
Cheapest flexible sports subscription	€8.99 (LAOLA1 monthly subscription)
Median sport ÷ Netflix Standard	1.9×
Core tariffs in promotion on the cut-off date	17%
Example route for a football fan, twelve months	€456 (2.4× a year of Netflix)
Brands selling a pure sports subscription standalone	4 of 4 (100%)
Live partners: domestic top flight	ORF and Sky
Live partners: Champions League	CANAL+ and Sky
Live partners: Europa and Conference League	CANAL+, ServusTV and Sky
Formula 1	not documented
Olympic Games	ORF
Dated contracts ending by 2027	43%

Prices in euro at the rates of the cut-off date (18 September 2026). Definitions as in Part I. Source: ONE8Y Database.

MARKET STRUCTURE

The ONE8Y Database holds 17 operator profiles, 9 live partners and 21 live competitions for Austria, the fewest of the seven markets. Sky holds all 195 matches of the ADMIRAL Bundesliga for 2026/27 to 2029/30, with ORF showing four matches per season free-to-air; the league has not published the contract value. The Champions League sits with CANAL+ and Sky, the Europa and Conference League with CANAL+, ServusTV and Sky. Live Formula 1 rights are not documented for Austria; the Olympic Games are with ORF.

Free-to-air television carries a large part of Austrian sport. ORF holds live rights in 8 documented competitions, more than any pay operator, from the Bundesliga and the national teams to skiing and ice hockey; ServusTV adds 3, including MotoGP. Sky holds 6.

PRICES AND THE PREMIUM

The median flexible subscription costs €29.99 a month, 1.9 times Netflix Standard, and the median monthly value on annual terms is €19.99. The cheapest entry, LAOLA1 monthly subscription, costs €8.99. The two index pairs are DAZN at 50.0 per cent and Sky X Sport at 44.0 per cent, a market median of 47.0 per cent.

BEYOND FOOTBALL

Austria has 5 documented sports and 21 live competitions; football is 62 per cent, the highest share of the seven markets. Behind it stand Motorsport (2), Skiing (1) and Handball (1). Skiing and ice hockey — the FIS World Cup, the win2day ICE Hockey League — are free-to-air on ORF, MotoGP on ServusTV. The paid sports offer in Austria is largely a football offer; the second sports reach fans without a subscription.

ACCESS

The route to the Bundesliga and the exclusive UEFA top match combines Sky X Sport annual subscription (€300.00) and CANAL+ Kombi (€155.88): €455.88 over twelve months, 2.4 times a year of Netflix Standard. Every documented sports brand sells a pure sports subscription on its own (100 per cent). A single pay partner for the whole league and a strong free-to-air layer keep the fan's bill low.

WHAT TO WATCH

From 2027/28 DAZN shows 186 Champions League matches per season, Sky the Tuesday top match, PULS 4 the final and the Super Cup free-to-air, and CANAL+ all Europa and Conference League matches. The Champions League shifts to DAZN; ServusTV and Sky leave the Europa League. The Bundesliga and the weekly Champions League top match will both be at Sky, most other Champions League matches at DAZN: whether the Austrian route becomes cheaper or dearer depends on which of the two a fan follows. 43 per cent of dated contracts end by 2027.

FOR DECISION-MAKERS

→ RIGHTS HOLDERS

Austria shows what one league partner plus a strong free-to-air layer means for the fan’s bill. Weigh the price of a split against the reach — otherwise the next tender trades a low route cost for a marginal rights gain.

→ OPERATORS

The move of the Champions League to DAZN re-sets the Austrian second subscription. Win the fan in the 2027/28 switch — otherwise the change of rights holder becomes the fan’s mo-ment to leave.

The Austrian premium rests on two price pairs and is directional; core-tariff values rest on 6 core tariffs. Example route: Sky X Sport annual subscrip-tion plus CANAL+ Kombi. UEFA awards from 2027/28 as announced by the operators.

OPERATOR INVENTORY · LIVE RIGHTS PARTNERS, CURRENT CONTRACTS

PARTNER	COUNT	DOCUMENTED LIVE COMPETITIONS (SELECTION)
ORF (free-to-air)	8	ADMIRAL Bundesliga; Olympic Games 2026, 2028, 2030, 2032; FIS World Cup, ÖSV home events; women’s national team, women’s Bundesliga and Cup; Ski Austria home World Cup races ...
Sky	6	Premier League; Premier League and Bundesliga DE; ADMIRAL Bundesliga; UEFA Champions League; UEFA Europa & Conference League ...
ServusTV (free-to-air)	3	MotoGP; MotoGP, Moto2, Moto3, Rookies Cup; UEFA Europa/Conference League
DAZN	2	German Bundesliga; LaLiga, Serie A, Ligue 1
CANAL+	2	UEFA Champions League; UEFA Europa/Conference League
LAOLA1	1	ADMIRAL 2. Liga
Sportkrone	1	HLA MEISTERLIGA
ProSiebenSat.1 PULS 4	1	UNIQA ÖFB Cup
Sporteurope.TV	1	win2day ICE Hockey League

Distinct competitions with current live rights per normalised partner in the ONE8Y Database (21 competitions in this market). A listing evidences the partner, not every match or window; highlights, resellers and aggregators are not counted.

SPORTS TARIFFS BY BRAND

BRAND	TARIFFS	ACCESS	CHEAPEST FLEXIBLE PURE SPORTS TARIFF, €/MONTH	CHEAPEST PURE SPORTS TARIFF ON ANNUAL TERMS, €/MONTH
CANAL+	1	stand-alone	—	€12.99
DAZN	2	stand-alone	€29.99	€19.99
LAOLA1	1	stand-alone	€8.99	—
Sky	2	stand-alone	€35.99	€25.00

Tariffs as documented in the price benchmark of the ONE8Y Database. The price columns refer to standalone pure sports subscriptions only; add-ons and telco bundles are listed without a price because their cost depends on a base contract.

PART III

OUTLOOK.

KEY FIGURE · PART III

38%

of dated competition-partner contracts end by 2027.

Parts I and II describe the market on the cut-off date. Part III asks where it is going: which transactions and awards are already dated, which orders the market can move into, and what that means for each group of decision-makers.

The outlook is built on the same discipline as the benchmark. Dated events are reported as events, with their status. Scenarios are hypotheses with an observable trigger, not forecasts with a probability. Implications follow from documented findings and name the finding they rest on.

DATED SIGNALS.

The events below are dated and sourced. They describe what happened, not what it means; interpretation follows in the scenarios.

DATE	EVENT	STATUS
15 September 2025	Ligue 1+ reports 1.026 million subscribers, 72 per cent of them committed for the full season.	Published by LFP.
24 February 2026	Altman Solon survey of 6,000 fans in six countries: 39 per cent of 18 to 24 year olds typically watch a whole event, against 61 per cent of the over-65s.	Survey; no time trend.
24 March 2026	ShowHeroes and Omnicom survey of 4,377 people aged 18 to 65 in six European markets: 58 per cent want to reduce subscription costs; 27 per cent use free ad-supported streaming.	Survey; not a cancellation rate.
6 May 2026	Sky renews Formula 1 for the UK and Ireland to 2034 and for Italy to 2032.	Confirmed.
1 June 2026	RTL Group completes the acquisition of Sky Deutschland: €68m cash at closing, variable consideration capped at €377m, around 12.3 million paying subscribers combined, €250m annual synergies targeted.	Completed; synergies are a target.
6 July 2026	Sky agrees to acquire ITV Media & Entertainment for up to £1.6bn, including £1.2bn in cash.	Announced; CMA invitation to comment on 23 July 2026.
13 August 2026	LFP publishes the Ligue 1+ offers for 2026/27.	Published by LFP.
14 September 2026	Telefónica agrees to distribute DAZN's LaLiga matches (five per matchday) non-exclusively for 2027/28 to 2031/32, at an average of €330m per season.	Agreed; filed with the CNMV on 15 September 2026.

Each entry is documented in the ONE8Y Database with its source and the date it was checked.

I THREE ORDERS TO 2032.

The scenarios are hypotheses, not forecasts. Each names an observable trigger that shows which order a market is moving into.

A

THE AGGREGATOR ORDER

Rights holders keep selling rights; one distributor per market holds the customer. The Telefónica–DAZN agreement is the template: a rights buyer becomes a wholesale supplier to the network that owns the customer relationship. In this order, the commitment premium would converge towards bundle pricing, because a sports tier inside a bundle has no seasonal exit to defend.

Where it stands: Spain is closest. With the DAZN agreement and the provisional UEFA award, Telefónica would hold or distribute every LaLiga match and all UEFA club football from 2027/28. France shows a variant: four telcos distribute sport to their own subscribers. **What it means for fans:** fewer subscriptions, but access tied to a network — the Spanish finding that complete football is only documented with a fixed line becomes the rule rather than the exception.

TRIGGER

Further non-exclusive distribution agreements between sports rights buyers and telcos, particularly ahead of the next Serie A and Bundesliga cycles.

B

THE PLATFORM ORDER

Global platforms buy national rights directly and national pay-TV becomes a second window. The UEFA awards from 2027/28 point in this direction in Germany and the UK, where Paramount+ is named preferred bidder and Amazon keeps first picks. The early Formula 1 renewals by Sky in the UK and Italy show the counter-move: an incumbent that renews before the tender.

Where it stands: Germany and the UK are closest. Paramount+ is preferred bidder for the Champions League in both, Amazon Prime Video keeps its first picks, and in both markets a current holder drops out of the UEFA club competitions. **What it means for fans:** one more subscription for European football, priced by a platform whose sports offer is one part of a global entertainment product. If platforms carry their entertainment price architecture into sport, the exit right would cost the uniform 20.0 per cent of the comparison group rather than the sports median of 45.6 — the first market-wide test of whether the sports premium survives competition.

TRIGGER

Whether the Paramount+ awards are confirmed as final contracts and how the matches are packaged for consumers from 2027/28.

C

THE LEAGUE ORDER

Leagues sell direct and keep the customer. Ligue 1+ is the only live test in a top-five market. Its subscriber figures are published irregularly and partly orally; no official figure for the start of 2026/27 exists.

Where it stands: France is the only live case. The league's own product charges a premium of 50.7 per cent for monthly cancellation, above the market median of 46.7 — the league has adopted the pay operators' price architecture along with their role. **What it means for fans:** one subscription for the league, but no bundling of the league with European football, which stays with the operators. The route cost in France is still the cost of two subscriptions.

TRIGGER

An official Ligue 1+ subscriber figure for the 2026/27 season and its share of season-long subscriptions.

IMPLICATIONS.

Each implication below follows from a documented finding. None depends on an estimate.

The implications are addressed to five groups. They share one premise: the consumer side of sports rights is measurable, and the measurements in this study are specific enough to act on — by market, by operator and by product.

OPERATORS

Test the season against the year.

A premium of 2.28 times the entertainment value prices the exit right, not the content. A season-length product is the direct test of what the premium protects. The spread between markets — from 33.4 per cent in Germany and the UK to 63.8 per cent in Switzerland — shows that the market tolerates very different premiums; the question is which one retains customers and which one only deters them. Run the test before the next season start, otherwise the premium stays a habit rather than a decision.

RIGHTS HOLDERS

Model the consumer route your package design produces.

In every market with a comparable route, the fan needs two subscriptions for the league and the main European competitions. The route cost is computable on the day the packages are defined: from €456 a year in Austria to €780 in Germany today. A tender that maximises the rights value without pricing the fan route leaves the cost to be discovered by the fan.

TELCOS**The distribution position is priced separately from the rights.**

Telefónica pays DAZN an average of €330m per season to distribute matches DAZN holds. The customer relationship has its own price.

INVESTORS**Read the renewal calendar.**

38 per cent of the dated contracts end by 2027, and the UEFA cycle from 2027/28 changes the buyer in several markets. The exposure differs by market — from 29 per cent in Spain to 64 per cent in Switzerland — and by operator: some current holders of European club football have no documented UEFA rights from 2027/28.

ALL PARTIES**Separate the price of content from the price of access.**

In Spain, complete access is only documented with a fixed-line contract; in Switzerland and Austria every sports brand sells standalone. The same content reaches fans on very different terms.

METHOD APPENDIX.

MARKET SELECTION

The study covers the Big Five and the DACH region. The Big Five are the markets of Europe’s five highest-revenue football leagues: the Premier League, the Bundesliga, LaLiga, Serie A and Ligue 1. DACH stands for Germany (D), Austria (A) and Switzerland (CH), the region in which ONE8Y is based and on which the ONE8Y Database focuses. Switzerland and Austria are smaller markets than the Big Five; they are included because their access models differ markedly and because ONE8Y documents them in the same depth. The selection is not a ranking of Europe’s largest media markets.

EVIDENCE RATINGS

Each finding carries one of three ratings. High: the underlying population is fully documented, as for the price pairs and the league and Champions League rights in all seven markets. Medium: a sample with a known bias, such as the tariff mix per market. Low: the result depends on how deeply a market is documented; such findings are not published. Only high-rated findings are published without qualification; the rule is checked automatically.

PRICE PAIRS

Twelve-month cost is computed as the annual prepayment where offered, otherwise as twelve monthly payments on the respective term, with promotional months at the promotional price. Where the entry price is higher than the follow-on price, as with Sky Sport in Switzerland, the entry price is treated as the list price and the tariff does not count as a promotion.

BEFORE PUBLICATION

All 146 tariffs that enter a published finding were checked again against the operator’s own page up to 25 September 2026. 143 were confirmed or corrected at source; every figure recalculates from the corrected value. For 3 tariffs of one UK operator, Premier Sports, the current price is confirmed but the price on the cut-off date is not documented. Without this pair the UK median premium would be 29.2 per cent instead of 33.4 per cent; the pooled median would be 45.5 per cent. Prices can change after the cut-off date; the study reports them as of that date and does not update them.

SOURCES

Regulators and statistical offices, league and federation announcements, company filings and releases, and operator price pages. Trade press is used for cross-checking and is labelled as reported where it carries a figure. The ONE8Y Database records every source with URL, date and the entry it supports.