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GERMAN SPORTS STREAMING MARKET: UNDERSTANDING CONSUMER BEHAVIOR AND GROWTH STRATEGIES

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Abstract

The rapid evolution of sports streaming has disrupted traditional TV in Germany, driving demand for flexibility and affordability. This study explores the key-factors influencing consumer decisions, focusing on challenges such as market fragmentation, rising costs and unmet needs. Using a multi-method approach, it integrates conjoint analysis to quantify preferences, perceptual mapping to visualize platform perceptions and insights from expert interviews as well as a pre-survey.

The findings highlight the need for user-centric strategies to increase satisfaction, address affordability and reduce fragmentation, particularly in Germany's football-centric culture. The study provides actionable recommendations for platforms to adapt to evolving consumer expectations in a competitive market.

Keywords

Sports Streaming Industry, Consumer Perceptions, Consumer Preferences, Market Fragmentation, Pricing, Content Variety, Conjoint Analysis, Perceptual Mapping, Competitive Positioning, User-Centric Strategies, Digital Transformation, Germany, Marketing Research

1 Introduction

“The future of sport is not just in the stadiums, but in the streams where fans connect with the game in a whole new way” (Tennery & Chmielewski, 2024).

The sports streaming industry is undergoing rapid growth and transformation, making it a compelling area for analysis. In Germany, the general streaming market grew by 19.5% to €4.1 billion and is expected to increase to €5.8 billion by 2028, based on a compound annual growth rate (CAGR) of 7.4% (PwC, 2024a). Streaming of live sport content is driving this growth, as Kantar’s data shows (Kantar, 2023). For instance, sports accounted for 1 in 4 new SVOD subscriptions in the first quarter of 2023 (Kantar, 2023). These figures highlight the rapid expansion and potential profitability of the industry, as well as its increasing importance in the broader entertainment market.

Within this rapidly evolving landscape, the decision to focus on the German sports streaming market is driven by several factors that make it uniquely suited for this analysis. Despite its current economic challenges and relatively slow growth rate, Germany remains Europe’s largest economy with strong purchasing power and a robust consumer base, which continues to drive its importance in the analysis (Statista, 2024a; Statista, 2024c). The country’s sports market is highly regarded globally and enjoys a unique cultural significance within German society, where sport is not just entertainment but a deeply rooted part of national identity. More than any other sport, football (in German: soccer) is the dominant force in German culture, shaping not only leisure and entertainment but also national pride and social cohesion (Lemp, 2024). This makes Germany an ideal environment to study how consumers interact with and prioritize sports streaming services. Furthermore, the German sports media landscape offers attractive market conditions for analysis. It is characterized by a strong presence of established streaming platforms such as DAZN and Sky/WOW, as well as increasing competition and market fragmentation (Mann, 2023). These dynamics provide a rich context for exploring consumer challenges, preferences and behaviors. By focusing on the German market, the study not only capitalizes on the country's unique market characteristics but also ensures that the insights generated are both relevant and actionable for players operating in this specific environment.

The research question, *"How have consumer perceptions evolved in the German sports streaming market, and what key factors should a streaming service embrace to meet customer needs?"* stems from the ongoing transformation of the sports streaming industry (AL-Zoubi, 2024; Einav, 2022). This transformation is characterized by rapid digitalization, changing consumer preferences and increased competition. Key issues are market fragmentation, rising costs and platform diversity, which together create challenges for consumers (Hutchins, 2019; Zhang et al., 2018). To address these challenges, this study identifies consumer preferences as well as perceptions and proposes actionable recommendations to guide service providers toward a more streamlined, user-centric approach. To comprehensively answer the research question, the following research objectives will be explored:

a) *What are consumers' preferences and what specific attributes do they value most in sports streaming platforms?*
b) *How do consumers perceive the top five sports streaming brands and how are these brands positioned in the market?*
c) *What are the gaps in the market and what are the strategic implications of addressing unmet consumer needs?*
d) *What are the key trends and developments that have shaped the German sports streaming market in the past, how is it currently evolving and what are the expected future directions?*

These research objectives serve as the basis for a systematic analysis of the market, providing a clear path to answering the central research question and bridging the gap between the evolving consumer demands in the German sports streaming market and the current offerings of streaming platforms.

Market fragmentation is one of the main barriers to consumer satisfaction in the German sports streaming industry (Zhang et al., 2018). High-profile sports such as football often require subscriptions to multiple platforms such as DAZN, Sky/WOW or RTL+, each with its own pricing and content strategy. This fragmentation is largely driven by licensing agreements, as the rights to broadcast specific sporting events are often split between different platforms. This practice forces consumers to subscribe to multiple platforms to access all the content they want, further complicating the user experience and driving up their costs. RTL News expert Wolfgang Schröjahr highlights this challenge: *"With big sports events like the Champions League, viewers must subscribe to multiple platforms like DAZN and Amazon to access all the content. This multi-subscription model annoys sports fans (Schröjahr, 2024)."* As a result, consumers are increasingly frustrated by the rising costs and limited access to a comprehensive sports offering. In addition, research from Nielsen (2022a) shows that traditional broadcasting methods (TV) are becoming less relevant as younger, tech-savvy audiences shift to digital platforms and demand flexibility and an enhanced user experience.

To provide clarity and guide the reader through the study, the following section outlines the structure of the thesis, detailing the content of each chapter. This thesis is divided into nine chapters that provide a comprehensive examination of the German sports streaming market and address the central research question.

The *Introduction* sets the scene by describing the challenge and the research objectives. It concludes with an outline of the structure of the thesis to guide the reader through the study.

Group Part

Following the Introduction, the *Contextual Background* in Chapter 2 provides an overview of the market and its business models. The *Literature Review* in Chapter 3 delves into the market more deeply, examining key players, market dynamics and technological advancements in sports streaming. In addition, this chapter discusses basic concepts of consumer behavior, engagement and satisfaction drivers, to provide a theoretical foundation for the study.

Building on this foundation, Chapter 4 presents findings from *Exploratory Expert Interviews*, which provide valuable insights from industry experts on trends, challenges and consumer expectations. This qualitative input informs the design of the subsequent quantitative research. Chapter 5 presents the *Pre-Survey* conducted to identify the key consumer preferences and attributes in the sports streaming market. This survey forms the basis for the detailed analysis in the following chapters. Chapter 6 presents the *Conjoint Analysis*, which quantifies the importance of key platform attributes, the trade-offs customers are willing to make, and the optimal combinations of platform features. This chapter also highlights findings on willingness to pay, price sensitivity and ranked concepts. Chapter 7 uses the *Perceptual Map* to visualize consumer perceptions of German sports streaming platforms. This chapter explores brand positioning and competitive dynamics, while highlighting strategic opportunities for providers to better align themselves with consumer needs. The *repositioning strategy of Amazon Prime Video* outlined in Chapter 8 covers the formulation of a go-to-market strategy for Amazon Prime Video in the German sports streaming market, incorporating the insights and findings from the master thesis. The *Conclusion* in Chapter 9 synthesizes the findings, contextualizes them within the research question and discusses their implications for sports streaming platforms. It also addresses the limitations of the study and suggests directions for future research.

2 Contextual Background

This section explores the dynamics of the German sports streaming market, highlighting the competitive landscape, changing consumer preferences and the impact of regulatory and ethical considerations. It provides an overview of the evolving industry, focusing on the role of exclusive content, business models and technological advances.

2.1 German Sport Streaming Industry

As previously described in the introduction the German sport streaming market offers attractive market conditions. To gain further market insights, it is first necessary to examine the general broadcasting landscape, where German consumers can choose between linear TV broadcasting and emerging streaming services (Deloitte, 2018).

The TV market remains an important option for traditional broadcasting as well as advertising, with 36.4 million households and revenues of €10.5 billion. However, forecasts point to a decline, with revenues expected to fall by 6% to €9.9 billion by 2028. This decline is influenced by changing consumer preferences, technological advances and the rapid rise of video streaming services, which are discussed further in this study. Streaming services will experience a significant growth, with an expected revenue increase of €5.8 billion in 2028, due to projected CAGR of 7.4% (PwC, 2024a). According to the study by Nielsen (2024), streaming will already surpass linear TV in terms of weekly usage by 2024, a trend echoed by Simon-Kucher, where more than half of respondents reported replacing linear TV with streaming (Simon-Kucher, 2024).

In terms of content preferences, consumers spend most of their time watching movies and series, but live events are also gaining traction, with 53% of respondents streaming live content at least once a week (Simon-Kucher, 2024). The rise of sports streaming, driven by the strategic acquisition of broadcast rights, has contributed significantly to the growth of the sector and the increasing popularity of live events.

Like the video streaming market, which is dominated by platforms such as Netflix, Amazon Prime Video and Disney+ with a combined market share of 71.7%, the sports streaming segment is characterized by concentrated but fragmented content offerings (GlobalData UK, 2023). This fragmentation is linked to exclusive rights for specific sporting events. The market share of sports streaming platforms often correlates with the popularity of the events they broadcast. According to Statista (Bocksch, 2024), football remains the most watched sport in Germany *(see Appendix 1; Figure 1)*, with 76% of respondents aged 18-64 actively following it. Winter sports, including biathlon and ski jumping, come second with 29%, while basketball is third with 26%. Other popular sports include handball, athletics, tennis, motorsports and American football, with viewing figures ranging from 20% to 23% (Bocksch, 2024).

Having examined the market dynamics in the sports streaming sector, it is important to understand how business models work within the industry.

2.2 Business Models in Sport Streaming

The sports streaming industry in Germany revolves around the Subscription Video on Demand (SVOD) model (Kantra, 2023). This model offers consumers unlimited access to live sports events, highlights and on-demand content, making it an attractive and reliable revenue stream for providers. With the growing demand for flexibility in sports content, the SVOD model remains the most widely adopted strategy, ensuring a stable user base and recurring revenues (Evens & Smith, 2014).

Transactional video on demand (TVOD) is another business model, although it plays a secondary role in the sports streaming landscape. In this model, viewers pay a one-off fee to access specific events or matches without a long-term subscription commitment (Reuters

Imagen, 2024). Sky/WOW uses this approach for high-profile sporting events, such as major football matches, to capitalize on viewers who prefer to pay for individual experiences (PwC, 2024). The appeal of TVOD lies in its flexibility to cater for casual sports fans or those interested in occasional high-profile events.

In addition, the Advertising Video on Demand (AVOD) model, while less prominent in the sports streaming sector, represents a potential avenue for revenue diversification. In this model, content is made available to viewers free of charge, with revenue generated through advertising (Nisar, 2024). Although most German sports streaming platforms have not yet fully embraced AVOD, there is an opportunity for growth, particularly as platforms explore ways to attract cost-sensitive audiences and maximize advertising revenues (Deloitte, 2022c).

The examination of these different business models highlights the evolving strategies adopted by sports streaming platforms to meet different consumer preferences and market demands.

2.3 Regulatory and Ethical Environment

The sports streaming industry in Germany is characterized by a complex regulatory environment that governs its operations. This regulatory framework includes rules on licensing, data protection and anti-piracy measures enforced by national authorities such as the "Bundesnetzagentur" or EU regulations like General Data Protection Regulation (GDPR) (European Commission, 2023b). These rules ensure compliance with consumer data protection standards, responsible content distribution, and anti-piracy measures (European Commission, 2023a).

Licensing is a fundamental component of the sports streaming landscape, as it determines how the rights to broadcast sports content are distributed and forms the core of the business model for streaming services (Morgan Stanley, 2023). Typically, licensing involves the allocation of broadcasting rights by the entity that owns or oversees a particular sport, with the process varying depending on the structure, level of organization and geographical region of the sport (KEK, 2024). In major football leagues such as the Bundesliga, broadcasting rights are centrally managed by the league's organizing body (Deutschlandfunk, 2023b; KEK, 2024). In Germany this role is fulfilled by the Deutsche Fußball Liga (DFL), which allocates pay-TV rights through several packages, with each package limited to a single bidder (Tagesschau, 2024). The tendering process is overseen by the German Federal Cartel Office.

From an ethical perspective, the sports streaming industry in Germany faces challenges related to fairness in content access, pricing and data protection. Exclusive licensing and geo-blocking limit content availability, leading to consumer dissatisfaction due to fragmentation and perceived unfairness (PwC, 2021; Zhang, 2018). High subscription fees, driven by licensing costs, often lead to subscription fatigue, especially when content is spread across multiple platforms. This frustration drives some consumers to *illegal streaming services*, which circumvent these restrictions but cause significant financial losses for the streaming platforms concerned - estimated at €1.1 billion per year (Deutschlandfunk, 2023a). The German government also loses around €390 million per year in taxes and social contributions due to illegal streaming (Deutschlandfunk, 2023a). Efforts to combat these challenges include anti-piracy measures at both national and EU level (Eurojust, 2023).

3 Literature Review

3.1 Introduction

This literature review explores the technological, behavioral and market-specific factors influencing consumer perceptions in the German sports streaming industry. It aims to provide a comprehensive understanding of how these factors interact and influence the decision-making process of sports streaming consumers, particularly considering increasing competition and changing consumer expectations.

3.2 Digital Market Trends and Technological Advancements

Understanding digital market trends is critical for industries to adapt to changing consumer demands and remain competitive (Institute of General Semantics, 2004; Solomon, 2009). For sports streaming platforms, digital transformation enhances user experience and competitiveness in a rapidly evolving landscape (Deloitte, 2022b). This chapter explores global and German OTT trends, emerging technologies and the growing role of interactivity.

3.2.1 Global and German OTT Trends

The global OTT market is growing rapidly, driven by increasing internet usage and demand for on-demand content. OTT refers to the online delivery of media content directly to consumers, bypassing traditional distribution methods such as cable or satellite TV (Xu et al., 2023). This format gives users the flexibility to stream content to a variety of devices, including smartphones, tablets and smart TVs, without the need for dedicated broadcast infrastructure (Xu et al., 2023). Valued at $162 billion in 2023, the global OTT market is expected to reach $215 billion by 2029, reflecting its accelerating adoption and growing importance in the entertainment as well as sports sectors (Statista, 2022b).

In Germany, OTT sports streaming is a competitive sector dominated by platforms such as DAZN, Sky/WOW and Amazon Prime Video, as further discussed in chapter 3.5. With Germany’s digital industry forecast to grow by 4.4% in 2024, the sports streaming sector is poised for further growth, driven by increased demand for digital solutions (Germany Trade & Invest, 2024).

The increasing digitalization of media consumption in Germany underlines a consumer shift towards flexibility and convenience. This trend will be further discussed in the context of technological advances.

3.2.2 Emerging Technologies in Sports Streaming

Technological innovation is transforming the sports streaming experience, making it more personalized, immersive and responsive.

Artificial Intelligence (AI) is at the forefront of these advances, enabling platforms to analyze user behavior and make personalized recommendations. AI-driven algorithms suggest live events, highlight reels, or recaps based on individual viewing habits, significantly increasing engagement and retention (Rodrigues et al., 2023). The global AI in sports market is expected to grow at a CAGR of 28.8% to reach $6.69 billion by 2028 (Steven, 2024). AI also enables real-time data visualization and analysis, providing fans with insights into player performance, game strategies and match dynamics.

Augmented Reality (AR) and *Virtual Reality (VR)* are enhancing the sports streaming experience. AR integrates real-time statistics and visuals with live game footage, while VR immerses viewers in simulated environments, allowing them to experience the game as if they were in the stadium. For example, fans can switch between multi-angle camera views or access coach-level perspectives during the game, adding a new layer of interactivity (Schmidt et al., 2023).

5G technology is revolutionizing sports streaming by reducing latency and supporting high-definition formats such as 4K and 8K (Samsung, 2020). With faster data speeds and improved connectivity, 5G ensures seamless live streaming even in crowded locations, closely mirroring real-time events (Rodrigues et al., 2023). Supporting this trend, the German digital media market is expected to grow by 7.01% (2024-2027), fueled by the increasing adoption of 5G (Statista, 2024b).

3.2.3 Second-Screen Usage and Interactivity

Second-screen usage has become an integral part of the sports streaming experience, allowing fans to engage with additional content or interact with other viewers while watching live broadcasts.

Platforms encourage fans to participate in live discussions on *Social Media platforms* such as Twitter, Instagram and TikTok. This engagement fosters community building and an emotional connection to the content (Nielsen, 2022a). Furthermore, *interactive tools* such as live polls, real-time stats and multi-screen options increase viewer participation. For example, platforms can allow fans to vote for "player of the match" during games or explore real-time player analytics on second screens. These features not only increase engagement but also provide platforms with valuable insights to optimize their services (ContentWise, 2021).

Together, these digital trends point to a shift towards more flexible, interactive and user-centric experiences. Research highlights the role of technologies like AI, AR/VR and 5G in creating transformative experiences and differentiating themselves within a highly dynamic market.

3.3 Shift in Consumer Viewing Preferences

This chapter examines key factors shaping the sports streaming market, including changing content preferences, the balance between live and on-demand offerings and demographic influences on consumer behavior.

3.3.1 Evolving Preferences for Sport Content

Changing consumer viewing habits are reshaping the sport streaming market (McKinsey & Company, 2020). The shift from traditional broadcasting to online streaming is driven by the growing preference for the flexibility of digital platforms over fixed TV schedules (Shrivastav, 2022). This has led to a sharp decline in traditional cable subscriptions, with 77% of Germans now using video streaming services on a weekly basis, compared to just 31% who still watch cable TV - a figure that continues to fall (Nielsen, 2024b; Zattoo, 2024).

Mobile and multi-device streaming is also gaining prominence, with over 60% of German viewers expected to regularly access sports streams via smartphones, tablets or smart TVs, by the end of 2024 (Statista, 2024d). This trend is particularly pronounced among younger audiences, who prioritize the ability to seamlessly switch between devices and engage with content wherever they are (Statista, 2024b).

Overall, evolving viewer demands for flexibility and personalized experience are driving a shift away from traditional linear formats towards more dynamic and interactive sports media consumption (Holiber, 2024). This transition reflects the evolving audience expectation in a rapidly changing sports media landscape, as highlighted in the mentioned studies.

3.3.2 Role of Live vs. On-Demand Content

Liveness is a crucial asset in sports media broadcasting, as highlighted by Hutchins, Li and Rowe (Hutchins et al., 2019). This is due to two key factors: first, sport media is a “transient phenomenon”, where excitement and entertainment value diminish significantly as soon the outcome is revealed, undermining the value of delayed streaming (Hutchins & Rowe, 2019). Second, the live viewing experience is connected to symbolic forces, attached to shared rituals of sports passion, which provide access to collective social experiences (Dayan & Kartz, 1992; Van Es, 2017).

The role of live sports is further reinforced by the fierce competition for sport broadcasting rights among streaming platforms, especially in the U.S. market (Burrows, 2024). For instance, Amazon Prime Video secured rights to stream 66 NBA games annually for more than $1.8 billion, starting in 2025, while Netflix purchased WWE’s Raw for ten-year deal beginning in 2024 (Amazon, 2024c; Burrows, 2024; Ganguli et al., 2024).

Alongside live events, on-demand content - often referred to as “shoulder content” - has emerged as a vital part of sport streaming. On-demand offerings such as biographical, docuseries and Behind-the-scenes content have contributed to the industry’s growth, with 263 projects released between 2020 and 2024. Popular formats like Netflix’s “Drive to survive” and Amazon Prime Video’s “All or Nothing” have gained popularity, helping Netflix (26.6%) and Amazon Prime Video (19%) dominate this market (Luminate, 2024). These formats attract diverse demographics and expand fan bases, as further explored in 3.3.3. On-demand content is seen as a cost-efficient and complementary strategy to live-events in the sport streaming market (Luminate, 2024).

3.3.3 Demographic Influence on Preferences

According to the whitepaper “the global sports media landscape” (YouGov) 29% of the engaged sport supporters globally have a subscription to a sport streaming service, with males (32%) being more likely to subscribe than females (25%). Younger age groups show the highest interest, with 39% of individuals aged 25 to 34, 35% of those aged 35 to 44 and 34% of those aged 18 to 24, subscribing, compared to just 28 % of those aged 45 to 54 and 17% of those aged 55+ (YouGov, 2023).

Similar patterns emerge for lifestyle focused sport content, with 41% individuals aged 25 to 34 and 40% of those aged 35 to 44 showing interest, compared to only 30% of those aged 45 to 54 and 17% of those aged 55+ (YouGov, 2023).

In Germany, streaming trends also reflect a generational divide. A Nielsen study (2024) reports that 92% of 18 to 34-year-olds use streaming services weekly, compared to 83% of those aged 35 to 54-year-olds, while older viewers favor traditional public TV, with ARD and ZDF maintaining a weekly reach of 73%.

Although the YouGov data (2023) focuses on global sport streaming and the Nielsen's report (2024) encompasses all video content in Germany, both highlight a common trend: younger audiences foster the shift toward sport streaming, while older generations remain attached to traditional TV.

3.4 Concept and Delimitation of Consumer Behavior

This section examines consumer behavior and key decision-making models relevant to choosing sports streaming platforms, focusing on psychological, social and economic factors that drive preferences as well as engagement.

3.4.1 Definition and Theoretical Foundations

Consumer behavior explains how individuals make decisions to select, purchase and use products, influenced by *internal* motivations and *external* factors such as economic and social conditions (Schiffman et al., 2019; Dwyer & Kim, 2011). To understand decision-making in the German sports streaming market, this section applies *Maslow's hierarchy of needs (see Appendix 1; Figure 2)* and the *Consumer Decision Making Process* (i.e. the Engel-Kollat-Blackwell (EKB) model). These frameworks highlight critical attributes - such as affordability, content exclusivity and platform usability - that influence consumer decisions. These insights directly inform the design of conjoint analysis and perceptual map analysis, which measure and visualize how consumers prioritize these attributes.

Maslow's Hierarchy of Needs (Maslow, 1943) explains how people move from satisfying basic needs to achieving higher-level goals. At the basic levels, consumers prioritize affordability and reliability to satisfy physiological and safety needs. For example, price-sensitive viewers, such as casual sports fans, prefer flexible and low-cost subscriptions (Simon-Kucher, 2023a). At the same time, uninterrupted streaming is crucial, especially during popular events, as technical issues - such as Netflix's buffering problems during the Jake Paul vs. Mike Tyson fight - can lead to frustration (O'Brien, 2024). These factors, such as price and reliability, are later analyzed in the Perceptual Map, which compares streaming platforms based on how consumers rate these attributes.

At higher levels of Maslow's hierarchy, psychological and social needs come to the fore. Sport, an inherently social experience, creates a sense of community and belonging, particularly for hardcore fans who value interactive features such as live chats, fan forums or team-focused updates (Nielsen, 2022a; Forbes, 2024). Moving on to esteem needs, exclusive content - such as behind-the-scenes footage, early access or VIP privileges - appeals to aspirational consumers seeking recognition and deeper fan engagement (Casaca & Miguel, 2024). Finally, platforms cater to self-actualization by offering personalized experiences through AI algorithms, as seen in Amazon Prime Video's tailored content recommendations, which satisfy consumers' desires for control, self-improvement, and enjoyment (Schiffman et al., 2019). These findings provide the basis for analyzing feature preferences and trade-offs in conjoint analysis.

The *Engel-Kollat-Blackwell (EKB) model* complements Maslow's framework by explaining the five stages of consumer decision making: problem recognition, information search, evaluation of alternatives, purchase decision and post-purchase behavior (Blackwell et al., 2006). In the problem recognition stage, consumers identify their need to watch sports content, triggered by events such as Bundesliga matches or dissatisfaction with an existing platform. In the information search and evaluation of alternatives stage, consumers compare platforms such as DAZN, Sky or Amazon Prime Video based on key attributes such as pricing models, content variety and exclusivity (Engel et al., 1968; Blackwell et al., 2006). These decision criteria are central to conjoint analysis, where attributes and levels are systematically tested to reveal the trade-offs, consumers make.

In the fourth stage, the purchase decision, consumers select and subscribe to a platform. This stage is often influenced by promotions, free trials or the availability of unique features (Blackwell et al., 2006). The final stage, post-purchase behavior, involves users evaluating their experience. Satisfied subscribers are likely to remain loyal and continue their subscription, while dissatisfied users may switch to competitors.

Together, these frameworks bridge the gap between theory and practice. Maslow's Hierarchy of Needs and the EKB model identify critical decision attributes and stages, which directly inspire the design of conjoint analysis and perceptual map analysis. Conjoint analysis quantifies attribute importance and consumer trade-offs, while perceptual maps visualize how platforms are positioned in consumers' minds. This integration allows the study to provide data-driven insights into evolving consumer preferences and inform strategies for meeting customer needs in the competitive German sports streaming market.

3.4.2 Drivers of Consumer Engagement and Satisfaction

Building on the consumer decision-making process, this section explores the drivers of user engagement and satisfaction, which are critical for sports streaming platforms looking to attract and retain subscribers. By addressing key factors such as pricing models, exclusive content, user experience, and engagement metrics, these platforms can create compelling value propositions for their audiences.

Pricing Models and Value for Money

Consumers are becoming increasingly price-sensitive, especially in saturated markets where alternatives are readily available. Research suggests that a 10% price increase can lead to a 20% increase in subscriber churn (Jaeger & Grant, 2023). To mitigate this, streaming platforms must ensure that any price adjustments are accompanied by added value, such as enhanced content offerings or innovative features (Jaeger & Grant, 2023). Flexible pricing models, including pay-per-view options, discounted bundles and student subscriptions, can also help cater to different audience segments. For example, Amazon Prime Video's bundled services, which include sports among other benefits such as free shipping and video streaming, are perceived as offering better value than standalone sports platforms. The later analysis will explore value for money in more detail (*see capter 6 and 7*).

Exclusive Content

Access to exclusive sports content remains one of the strongest motivators for subscriptions. Around 29% of engaged sports fans worldwide subscribe to streaming platforms specifically for exclusive access to events such as Bundesliga matches or international tournaments (Statista, 2024j). This trend is particularly strong among younger demographics, with 39% of 25-34-year-old sports fans subscribing to platforms for exclusivity. Exclusive content not only attracts new subscribers but also builds long-term loyalty among hardcore fans.

User Experience

A seamless and intuitive user experience is essential to drive satisfaction and reduce churn. Features such as easy-to-use app interfaces, personalized recommendations and reliable streaming capabilities are critical to ensuring a positive viewing experience. According to a Nielsen survey (2022a), 51% of younger viewers and 55% of Gen Z fans actively engage with live statistics during the game, which improves their understanding of player strategy and performance. In addition, high-definition streaming and innovative features such as multi-camera views and real-time analytics create an immersive viewing experience. Platforms in Germany, for example, focus heavily on broadcast quality and innovative camera angles to meet viewer expectations (DFL, 2024c). Platforms in China, on the other hand, integrate social features such as real-time commentary ("bullet screens") to cater for different regional preferences.

Engagement Metrics

Monitoring engagement metrics such as session length, click-through rates and feature usage provide valuable insights into consumer behavior. Platforms that analyze these metrics can identify trends, tailor content offerings and introduce interactive features to meet user expectations. For example, data on feature usage, such as the popularity of real-time stats or behind-the-scenes clips, can help platforms prioritize development efforts. Engagement metrics also play a key role in measuring the success of exclusive offers and personalized recommendations. By investing in advanced analytics and AI-driven tools, platforms can ensure a more personalized and satisfying user experience (Chaffey & Ellis-Chadwick, 2019).

Emerging Trends in Personalization and Interaction

Looking ahead, emerging trends in virtual personalization and interactivity will continue to shape the sports streaming landscape. Platforms are increasingly using AI to deliver tailored content, such as personalized highlights, and to predict user preferences based on past viewing behavior. These advances not only increase satisfaction, but also create a deeper connection between viewers and the platform, fostering long-term loyalty. Features such as virtual reality integration and live chat are becoming essential components of the sports streaming experience.

By focusing on these key drivers - pricing models, exclusive content, user experience and engagement metrics - sports streaming platforms can better align their offerings with consumer expectations.

3.4.3 Personalization and Retention Strategies

As seen in the previous chapters, personalization and retention strategies are critical for sports streaming platforms to meet evolving consumer expectations and drive long-term loyalty. Advances in technology, particularly AI and data analytics, are transforming the way platforms deliver personalized experiences and retain subscribers.

The Role of AI in Delivering Personalized Recommendations and Driving Engagement

The integration of high-tech technologies such as AI is reshaping the way platforms interact with viewers. AI-powered algorithms allow platforms to deliver personalized recommendations based on user preferences, viewing history and behavioral patterns. This approach is similar to music streaming platforms and is now being widely adopted in sports streaming (Hou, 2023). By offering tailored suggestions such as upcoming matches, athlete profiles or related documentaries, platforms can increase viewer satisfaction and engagement. In addition, features such as live chats, instant replies during broadcasts and real-time personalized statistics further enhance immersion and create a sense of immediacy (ContentWise, 2021).

AI is also driving innovations such as enhanced data graphics and real-time analytics, giving fans unique insights into individual athlete performance or team strategies (Deloitte, 2023d). For example, viewers can access advanced live data visualizations, player statistics or even AR and VR-enabled features that provide immersive experiences similar to being on the field or in the locker room (Schmidt et al., 2023). These advancements not only enhance the user experience but also create opportunities for deeper emotional connections to the content.

Using Data Analytics to Understand and Predict Customer Needs

Data analytics plays a key role in understanding consumer preferences and predicting future demand. Metrics such as session duration, click-through rates and feature usage provide actionable insights into consumer behavior, allowing platforms to continually refine their offerings (Chaffey & Ellis-Chadwick, 2019). Platforms can identify trends, such as increased engagement with real-time statistics or niche sports and adapt their strategies accordingly.

In addition, predictive analytics enables platforms to anticipate user behavior, such as identifying at-risk users who are likely to cancel their subscriptions (Zhang, 2023). These users can then be targeted with retention campaigns, offering personalized incentives such as discounts or exclusive content. Platforms that invest in advanced analytics gain a competitive advantage by staying ahead of changing consumer demands.

Emerging Technologies for Personalization and Retention

Innovations such as AR and VR are revolutionizing the personalization landscape. These technologies offer immersive experiences, such as allowing viewers to switch between camera angles, see the game from a player’s perspective, or interact with live data overlays directly on their screens (PwC, 2024b). These features not only increase engagement, but also create a sense of community among viewers, fostering loyalty and repeat usage.

However, the adoption of these technologies is still in its infancy, with platforms carefully evaluating their implementation. Challenges such as data privacy and consumer trust also need to be addressed to ensure sustainable growth (Sanz, 2023).

By leveraging AI, data analytics and emerging technologies, sports streaming platforms can deliver highly personalized and immersive experiences that cater to individual preferences. These strategies will not only increase user satisfaction, but also strengthen retention, enabling platforms to remain competitive in a rapidly evolving digital landscape (Zeithaml et al., 1996).

3.5 Competitive Dynamics in the German Sport Streaming Market

This chapter examines the competitive landscape of the German sports streaming market focusing on five key players - DAZN, WOW, Amazon Prime Video, RTL+ and MagentaSport - and their differentiation strategies in an oligopolistic market characterized by fierce competition for exclusive broadcasting rights (*see Appendix 1*, *Table 1*) (Reimann, 2024).

To put the actual debate of right packages into context: In April 2024, DAZN filed a lawsuit against the DFL for alleged discrimination in the allocation of Bundesliga rights, which led to a partial ruling in DAZN's favor and a rebidding of individual rights packages (Sportschau, 2024). This conflict will be elaborated in further analysis.

DAZN is the leading platform in German, providing a broad array of exclusive sports content, including top-class sport events like Bundesliga, Champions League, NBA and major tennis tournaments (DAZN, 2023). The platform attracts 15% of weekly viewers and achieved a milestone with 1.6 million viewers for a Bundesliga game in February 2024 (DAZN, 2023; Nielsen, 2024). Initially adopting a low-cost subscription model, DAZN has steadily increased its prices to €44.99 per month to ensure profitability (Imöhl, 2024, Jörgensen & Bossmann, 2024). Its strategy emphasizes high-profile content and tiered subscription models (€6.99 to €44.99) to appeal to different consumer segments (Lorenz, 2024).

WOW, launched by Sky in 2023, concentrates on high-profile sports such as Bundesliga, Premier League, Formula 1 and ATP Tennis tournaments, while also offering an entertainment package with selected series and movies for a monthly subscription fee of €35.99 (WOW, n.d). The weekly usage stands at 13%, while Sky Pay TV, which was analyzed separately in the study, reports 19% - both figures include viewers of non-sport content (Nielsen, 2024a). The platform's legacy as "Premiere" has built a loyal customer base, further reinforced by its longstanding partnership with the DFL (Stern, 2012; BPB, n.d.).

Amazon Prime Video provides a mix of entertainment and sport content offering high-profile events such as the Champions League and Wimbledon, with plans to broadcast NASCAR and NBA games starting in 2025 (Miller, 2024). It is used by 56% of the respondents, which is primarily due to the extensive range of films and series (Nielsen, 2024a). At €8.99 per month, the platform applies a value-for-money strategy, giving occasional sports supporters access to sport content alongside the broader Amazon ecosystem benefits (Amazon, 2024a, Amazon, 2024b).

RTL+ is a niche player focusing on affordability and secondary competitions like the UEFA Europe League and NFL, alongside a comprehensive entertainment offering (RTL Group, 2023; RTL Group, 2024). According to the Nielsen survey (2024), the platform is used by 21% of respondents. With subscriptions ranging from €5.99 to €12.99, RTL+ appeals to price-sensitive consumers by prioritizing accessible options (RTL Group, 2024; Brosi, 2024).

Finally, *MagentaSport*, part of Deutsche Telekom, specializes in niche sports such as basketball, hockey and low-tier football leagues (MagentaSport, n.d; MagentaSport, 2024b). It attracts 19% of the respondents, which includes consumption of non-sport content like movies and series via MagentaTV (Nielsen, 2024). By targeting underserved markets, MagentaSport has built a unique value proposition through a focus on community engagement and exclusivity in less mainstream sports. The subscription options range from €12.95 for Telekom users to €19.95 for non-Telekom users (MagentaSport, n.d; *see Appendix 1; Table 1*).

The German sports streaming market is an oligopoly, with these five players pursuing distinct strategies to secure their positions in a rapidly developing industry.

4 Pre-Survey

4.1 Methodology

To gain initial insights into consumer perceptions of sports streaming, a pre-survey of German consumers was conducted. The primary objective was to identify the key features and attributes that influence consumers' decisions when selecting a sports streaming platform, as well as to understand the reasons why some consumers choose not to subscribe. In addition, the study explores which sports streaming platforms are most important to consumers, as well as consumer behavior - specifically, how often they stream, and which sports they most frequently watch on these platforms. To understand the needs and choices of consumers, a survey was conducted using Microsoft Forms. The aim of the survey was to gather insights to complement the literature review and provide relevant data for the conjoint analysis that followed. By understanding user demographics, streaming habits and preferences for sports content and platform features, the survey results provide a basis for analyzing consumer priorities and enhancing the overall understanding of factors influencing sports streaming choices.

The pre-survey was distributed via WhatsApp, mainly to German family and friends. The first response was recorded at 12:58 pm on 25 September 2024, and data collection took place over 10 days, with the last response recorded at 04:48 pm on 04 October 2024. The survey received 50 responses with an average completion time of 2 minutes 55 seconds. All responses were considered valid *(see Appendix 3; Figure 3)*. A different sample was used for the pre-survey than for the conjoint and perceptual mapping analysis to ensure the robustness and reliability of the findings, thereby minimizing potential bias in the results.

4.2 Key Findings

As mentioned above, the purpose of the pre-survey was to determine which attributes should be included in the conjoint analysis. Of the 50 responses collected, although all were considered valid, only 35 respondents completed the entire survey. This was done to ensure relevance to the focus of the research. Only Germans who have subscribed or are currently subscribing to a sports streaming service were able to complete the full survey *(see Appendix 3; Tables 4, 5)*.

Demographic Data

Out of the 50 responses, 90% were German participants *(see Appendix 3; Table 4)*. Among the 35 complete responses, 80% were male and 20% were female *(see Appendix 3; Table 6)*, with the majority (24 responses) aged between 25-34 years *(see Appendix 3; Table 7)*.

Brands

Regarding the most-watched streaming services, information was obtained by asking "When you think of sports streaming providers, which ones come to mind?", over 86% had DAZN in the answer. Sky/WOW and Amazon Prime Video Sport were also popular among the sample *(see Appendix 3; Table 8)*. These results were supported by external industry reports, which consistently list DAZN, Sky/WOW, and Amazon Prime Video as the top platforms for sports content in Germany, followed by MagentaSport and RTL+ (Probemonat.net, 2024; Statista, 2024h).

Attributes

Price came out as a key feature: 74.3% rated it "Extremely important," while 14.3% rated it "Very important". That means users are looking for dearly affordable subscription fees. Equally important was the live availability, marked as "Extremely important" by 71.4% of participants and by 22.9% as "Very important" *(see Appendix 3; Figure 4)*. These findings suggest that live sports viewing significantly enhances user satisfaction with streaming services, aligning with Nielsen's observations that real-time sports content remains irreplaceable for fan engagement (Nielsen Sports, 2024).

Another valued factor was multiple account access: 34.3% of the respondents said this was “Extremely important,” while 42.9% declared it as “Very important.” Households or shared accounts like this feature because streaming simultaneously gives them added flexibility and convenience. Of similar importance, the quality at which they stream their content saw 51.4% rate this as “Very important” and 11.4% as “Extremely important.” For a good user experience, HD or 4K streaming unhindered and smooth, though desirable, were rated less important than price and live events *(see Appendix 3; Figure 4)*.

Features like the “variety of sports offered” and “exclusive content” fell in the middle of importance, as they were valued less crucial compared to the core features. Post-game content was appreciated, but also not considered as significant as live events, for example. Specifically, 34.3% rated “variety of sports offered” as only “slightly important”, while 17.1% rated the “availability of post-game content” as “not all important”. This suggests that even if these features might add value, they are not deemed critical.

Among the least valued features were social interaction and personalization. Most respondents, 57.1%, felt that social features related to live chat were “Not at all important,” whereas 45.7% showed the same attitude toward personalization. This could suggest that users prefer to focus on the content rather than interactive or AI driven features. Finally, data security and privacy were of relatively low importance, with 17.1% stated they were “not at all important,” indicating that a significant proportion of users expect basic protection but do not perceive it as a key differentiator *(see Appendix 3; Figure 4)*.

Looking at the results of the pre-survey, it can be concluded that attributes like pricing, live events availability, multiple account access and quality of content are seen as most relevant in sports streaming, which will be considered in the *Conjoint Analysis*.

5 Conclusion

5.1 Discussion

This thesis aims to answer the research question: *"How have consumer perceptions evolved in the German sports streaming market, and what key factors should a streaming service embrace to meet customer needs?".* To answer this question, the research objectives were stated at the beginning of the thesis and the two main analyses, *conjoint analysis* and *perceptual maps,* were utilized as key methodologies. The specific goal of the c*onjoint analysis* was to identify and quantify key attributes that influence consumer preferences in sports streaming, focusing on trade-offs consumers are willing to make. On the other hand, the goal of the *perceptual maps* was to understand consumer perceptions by identifying key dimensions and visualizing brand positioning relative to critical attributes. The following discussion focuses on evaluating the research objectives. It begins with an exploration of consumer preferences (*Research Objective "a"*) and brand positioning (*Research Objective "b"*), followed by an exploration of market gaps and unmet needs (*Research Objective "c")* and concluding with an analysis of key market trends and future directions (*Research Objective "d"*). The research objectives provide a foundation for a comprehensive examination of the market, offering a structured approach to addressing the central research question and bridging the gap between evolving consumer demands in the German sports streaming market and the current offerings of streaming platforms.

Understanding Consumer Preferences: Findings from Conjoint Analysis

The research objective "a": *"What are consumers' preferences and what specific attributes do they value most in sports streaming platforms?",* focused on understanding consumer preferences and was evaluated in the conjoint analysis, where certain attributes were liked or disliked.

The *monthly fee* attribute emerged as the most critical factor across all platforms, with a clear preference for a price of €9.99, highlighting the importance of affordability as perceived by consumers. The second most important attribute was *type of competition*, with domestic leagues consistently preferred over international or regional competitions. This reflects consumers' desire to connect with culturally significant and familiar sports content, such as football, which has a cultural significance in the German sports streaming market, as seen in literature (*see chapter 2.1)* (Bocksch, 2024). Similarly, *live events*, the third most valued attribute, was significantly preferred over on-demand content or highlights, highlighting the importance of real-time engagement with the excitement of sport. Multiple account access and streaming quality were moderately important, with flexibility in account sharing (two simultaneous streams) and high-quality streaming (4K Ultra HD), preferred to improve the overall viewing experience. Although the role of AI gets more and more important in the industry (*see chapter 3.2*), *personalized recommendations* were consistently the least important attribute, suggesting that consumers of sports streaming platforms know what they want to watch and value core features such as price and content over AI-driven suggestions.

Besides the interpretation and findings of attributes, the results of the conjoint analysis revealed a notable discrepancy between brand preferences as indicated in the ranked lists of concepts and the partworth utility analysis. While DAZN was identified as the most preferred brand in the ranked lists due to its alignment with consumer priorities such as premium quality and emotional engagement, the partworth utility analysis revealed that Amazon Prime Video outperformed DAZN on individual components. This result was primarily driven by Amazon Prime Video's strong performance in the value-for-money attribute, which resonated more convincingly with cost-conscious consumers. The results indicate that price sensitivity may be a significant factor influencing consumer decision-making, which highlights the potential for further discussion.

From a consumer behavior perspective, these findings are consistent with *Maslow's hierarchy of needs*. The model shows that individuals are motivated to satisfy a range of needs, from basic physiological requirements (e.g. having food and water) to self-actualization (e.g. achieving one's full potential) (*see chapter 3.4.1*).

The monthly fee, as a representation of affordability, aligns with the basic needs at the base of Maslow's pyramid. It ensures the financial accessibility required to use sports streaming services, similar to the satisfaction of basic needs such as safety and security. Once this basic need is satisfied, consumers can move on to satisfying higher-level needs. Preferences for domestic leagues and live events are linked to self-actualization by fostering a sense of fulfilment and passion through culturally significant and real-time sports experiences.

To answer research objective "a", asking for consumer preferences and valued attributes, the monthly fee was identified as the most critical factor for consumers when choosing a sports streaming platform, representing affordability and basic needs. The respondents indicated a high level of appreciation for the type of competition, with a clear preference for domestic leagues, indicating a strong cultural significance, such as football. The third most important attribute was the provision of live events, with consumers demonstrating a preference for specific live content over highlights or other formats.

<u>Understanding Consumer Perceptions: Findings from Perceptual Maps</u>

The research objective "b": *"How do consumers perceive the top five sports streaming brands and how are these brands positioned in the market?",* was explored through the perceptual maps.

The perceptual mapping analysis identified two key components that were found to shape consumer perceptions of sports streaming platforms. The *first component*, which relates to brand credibility and emotional appeal, was found to be strongly associated with a number of attributes, including *reliability, competence, authenticity, relevance and premium positioning*. These associations reflect the importance of trust, quality and emotional engagement in shaping consumer perceptions. In contrast, *Component 2* (Functionality and Value-Oriented Perception) was primarily driven by the attribute "value for money," which emphasizes affordability and practicality. Based on these findings, each of the five brands were assigned to both components to identify their current state and possible market gaps:

DAZN exhibited a pronounced alignment with *Component 1*, distinguished by its credibility, emotional engagement, and premium quality. However, there was a lack of alignment with *Component 2*, which resulted in affordability being a relatively weaker aspect of its positioning.

Amazon Prime Video, in contrast, was primarily aligned with *Component 2*, reflecting its focus on affordability and functionality. However, it did not strongly connect with emotional engagement or premium attributes.

Sky/WOW demonstrated moderate alignment with *Component 1*, exhibiting credibility and reliability. However, it failed to resonate strongly with affordability, which resulted in a less competitive positioning in terms of value for money.

Both *RTL+* and *MagentaSport* demonstrated a lack of alignment with either component. RTL+ lacked differentiation and had limited consumer appeal, while MagentaSport similarly failed to resonate with key consumer preferences, particularly in terms of trust, emotional engagement, or value for money *(see Appendix 5; Table 24)*.

To respond to research objective "b", which concerns the perception and positioning of the brands (*see Appendix 5; Figure 48*), two components were identified in perceptual maps (emotional appeal and functional perception), to better categorize the streaming platforms. Consequently, DAZN demonstrated superior performance in emotional engagement and premium quality yet encountered challenges in affordability. Amazon Prime Video placed a premium on affordability and functionality yet failed to foster an emotional connection. Sky/WOW placed significant emphasis on reliability yet failed to offer competitive value for money. RTL+ and MagentaSport were unable to align themselves with the key consumer preferences or to differentiate themselves in the market.

Tackling Subscription Fatigue and Price Sensitivity: Challenges of Market Fragmentation

The following discussion evaluates the findings of the research objective “c”:*”What are the gaps in the market and what are the strategic implications of addressing unmet consumer needs?”*.

The perceptual map analysis revealed a clear gap, with no single platform effectively balancing both emotional appeal and affordability. One of the main reasons for the described gap is the lack of emotional appeal, which is caused by consumer frustration over broadcasting rights: the splitting of broadcasting rights for major football matches (e.g. Bundesliga) across different platforms has forced fans to pay for multiple subscriptions to access all matches, significantly increasing costs and reducing accessibility, and is therefore seen as the main challenge in the market (*Schröjahr, 2024*). For instance, if someone wanted to stream all FC Bayern Munich matches, they would need three services in the 2023/24 season: Sky/WOW, DAZN and Amazon Prime Video and would regularly pay €731.68. This was the result of an analysis by Handelsblatt, which looked at all competitions from the Bundesliga to the Europa Conference League and evaluated the services offered by the streaming providers that broadcast them live (Handelsblatt, 2023).

This issue, often referred to as *subscription fatigue*, demonstrates a growing consumer frustration in the sports streaming market. For many fans, particularly those following high-profile events like the Bundesliga or the Champions League, the necessity to manage multiple subscriptions has a negative impact on the overall user experience. As highlighted in the expert interviews (*see chapter 4.2)*, consumer decisions are driven primarily by the content available. It is evident that fans place a high value on platforms that provide comprehensive access to their preferred sports content. However, the current system of split rights is creating obstacles to achieving this.

The underlying cause of subscription fatigue can be attributed to the competitive process of bidding for exclusive broadcasting rights (*see chapter 1*). To differentiate themselves in the market, platforms such as DAZN, Sky/WOW, and Amazon Prime Video often prioritize exclusivity, which ultimately results in inconvenience for consumers. It is essential for their business models that they retain these rights. For instance, Sky would be severely disadvantaged if it had lost the Bundesliga rights, as this would significantly reduce its customer base and negatively impact its market position (Welt, 2024). While existing partnerships, such as Sky's collaboration with DAZN (*see chapter 2.1*), aim to facilitate access, these efforts remain limited in extent. The fragmented rights structure continues to frustrate fans, particularly those with limited financial flexibility, by making it both costly and complex to follow their favorite sports. For context, the average net household income in Germany increased over the years and was around €20,900 as of the latest data (DIW Deutschland, 2024). This growing financial frustration underscores the need for broader collaboration or even structural changes in how broadcasting rights are allocated.

One potential solution to mitigate the issue of subscription fatigue is the establishment of more extensive and integrated partnerships between streaming platforms. Bundled subscription models, as demonstrated by the Sky and DAZN partnership, provide consumers with a simplified access point to a range of content from multiple platforms, all available under a single package (DAZN, 2024a; DAZN, 2024f). Extending this model to encompass a greater number of providers could reduce the complexity and cost for consumers to a significant extent. One reason why bundled subscription models might not be that common yet is because platforms are primarily focused on acquiring exclusive content, which they see as a competitive advantage in attracting subscribers. As a result, collaboration is often seen as less appealing and financially unviable due to the high costs associated with content acquisition and rights bidding (Martlenz, 2024).

Implementing such agreements often lies beyond the control of the streaming platforms themselves and depends on the policies of rights-holding organizations. For instance, in Germany, the DFL is responsible for selling Bundesliga broadcasting rights *(see chapter 3.5)*. These recommendations are in line with the findings of the thesis, which identify consumer dissatisfaction with fragmented offerings and the crucial importance of affordability and content availability (*see results conjoint analysis 6.4)*.

Transitioning from *subscription fatigue*, the discussion naturally shifts to the issue of *price sensitivity* and its impact on consumer preferences. As identified in the conjoint analysis, as well as in perceptual maps, affordability is the most critical factor for consumers when choosing a sports streaming service. In this environment, consumers are increasingly looking over their spending, prioritizing platforms that offer the best value for money. Price sensitivity is especially pronounced among younger audiences, as shown by their heightened preference for lower-cost services and domestic leagues.

However, this focus on affordability presents challenges for smaller streaming services such as RTL+ and MagentaSport. These platforms are facing increasing pressure to remain competitive against major players like DAZN and Amazon Prime Video (*Schröjahr, 2024*). These competitors have greater financial resources and broader content offerings that cater to diverse consumer needs.

The future viability of smaller streaming platforms depends on their ability to differentiate themselves, for instance by forming strategic partnerships with larger players. Without such measures in place, there is a risk of being edged out by industry leaders who can leverage economies of scale to offer lower prices and broader content offerings (GSMA, 2021). This illustrates the interconnectivity between subscription fatigue and price sensitivity, which describes the gap asked for in research objective "c". While consumers demand affordable, comprehensive solutions, the fragmented market and rising costs make it challenging for providers to meet these expectations with the result of the mentioned market gap. Strategic and managerial implications, which comprises the second part of research objective "c", also by proposing new pricing strategies, that foster sustainable success by addressing key trends and consumer needs, will be explored in detail in Section 9.2.

Future of Sports Streaming: Discussion about role of AI and Evolving Market Dynamics

The research objective "d" was focusing on key market trends and future directions: *"What are the key trends and developments that have shaped the German sports streaming market in the past, how is it currently evolving and what are the expected future directions?".*

The exploration of the last research objective, regarding key trends and developments that shaped the industry, was thoroughly addressed in the literature section (*see chapter 3.2*): The German sports streaming market has evolved through digital transformation and changing consumer behavior. Traditional broadcasting has moved to digital platforms, with innovations such as 5G improving streaming quality and reducing latency. The steady growth of the market reflects the increasing demand for user-centric, high-quality experiences, with future trends pointing to immersive technologies such as VR and AR, reshaping fan engagement. This evolving landscape also includes the role of AI in sports streaming. While AI is predicted to play a transformative role in optimizing content delivery and enhancing the viewer experience, the findings of this study highlight a disconnect between consumer priorities and the industry's focus on AI-driven personalization.

The emergence of AI was identified as a key digital trend influencing the future of sports streaming, while the results of the conjoint analyses revealed that consumers currently rank personalization features, such as tailored recommendations, as the least important. This indicates a clear preference for direct access to preferred content over AI-driven suggestions, particularly among sports viewers who often have specific preferences.

However, insights from expert interviews indicate a contrasting view on the importance of AI. Wolfgang Schröjahr (RTL News) states that AI tools are already playing a critical role behind the scenes in streamlining operations and enhancing viewer experiences (*Schröjahr, 2024*). Notable examples include AI-powered chatbots for the NFL, which provide concise highlights and efficient updates, which on the other hand also means high costs (*see chapter 4.2*). These tools operate largely in the background, which means that many consumers are unaware of their influence. This is in line with forecasts in the industry that AI in sports will experience significant growth by 2028, particularly as its integration becomes more seamless and sophisticated (*see chapter 3.2).*

The ability to adapt to these technological advancements also raises questions about the readiness of different age demographics. As highlighted in the interview with the RTL News expert Wolfgang Schröjahr, younger audiences are more likely to engage with and benefit from AI-driven features, given their greater familiarity with technology (Schröjahr, 2024). Platforms like RTL are already targeting this group with advanced, in-depth coverage of events like the NFL. Meanwhile, older viewers, who may prefer simpler interfaces and less technical complexity, require accessible and user-friendly approaches to digital developments. For instance, RTL's traditional linear offerings cater to a broader, older audience with less emphasis on advanced features (*Schröjahr, 2024*).

To address research objective “d,” which explores trends and future developments in the sports streaming industry, it was found that future digital tools like AR and VR will gain increasing importance, thereby requiring brands to adapt. Nevertheless, the survey results indicate that consumers are currently not widely aware of or demanding these AI-driven tools. Further insights were gained from expert interviews (*see chapter 4.2*), which revealed a mixed perspective on the application of AI tools. This finding was unexpected, as the researchers had initially anticipated that AI would already play a more prominent role in sports streaming. To gain broader acceptance across diverse demographics, platforms must ensure that these technologies remain accessible and inclusive. By offering a combination of sophisticated features for younger audiences and straightforward options for older users, sports streaming services can fully leverage the potential of AI while meeting the diverse needs of their audience base.

Based on the findings of the individual research objectives, the *overall research question* can be answered as follows: Consumer perceptions in the German sports streaming market are significantly influenced by frustration with subscription fatigue - resulting from the inability to access all desired streams on one platform - and dissatisfaction with pricing, creating a gap between emotional appeal and functionality that none of the five brands analyzed have successfully bridged.

To address these issues, streaming services should prioritize tackling subscription fatigue through strategic partnerships, consider new pricing models to better address price sensitivity, and leverage digital tools such as AI and 5G in a way that they meet consumer needs. These findings are further explored in the management implications presented in section 9.2, as a reflection of the given findings of the thesis.

5.2 Managerial Implications

Building on the central findings of this thesis *price, type of competition and content format* are the three most influential factors in consumer decision making in the German sports streaming market. In addition, *consumer engagement* and *leveraging digital transformation*, are also considered below due to their impact on the competitive environment (*see chapter 3.2*). These insights reflect the findings and serve as a basis for strategic and managerial actions to increase market share and satisfy consumer perceptions.

Pricing

As part of the conducted pre-survey as well as conjoint analysis, pricing was determined as the most crucial attribute in the consumer decision-making process. It plays a significant role in shaping consumers' perception of value and in establishing their platform preferences in a highly competitive market, characterized by an oligopolistic structure. Each of the five sport streaming brands showed a price-attribute importance of at least 30% and the demand exhibited price elasticity (€9.99), identified as the preferred price point for a subscription. These findings underscore the need for current players to develop a clear pricing structure that balances consumers' willingness to pay with increased prices for exclusive content. The business model represents the starting point in that structure and the SVOD is the dominant business approach, as presented by the literature review (*see chapter 2.3*). While TVOD only is as an additional income stream for event-driven and AVOD, which is gaining popularity in movie/series streaming sector, cannot be easily transferred to sport streaming. Live matches offer limited opportunities for commercial breaks, which even vary from sport to sport. Basketball for instance has more frequent and natural interruptions than football, which prevents a uniform approach for all sports.

While the revenue structure of sports streaming platforms is driven by subscription models, their pricing is highly influenced by content-related costs. In terms of football, the most attractive sport in Germany, the Bundesliga right costs per season total about €1.121 billion (DFL, 2024a). Except for the right allocation during COVID-19 2021/2022, prices have risen steadily, which is partly due to the increased demand, entry of new market participants such as DAZN and technological advance. In contrast to that the license fees per season for Handball-Bundesliga cost around €10 million (Kicker, 2022). Besides the content-related costs, streaming providers have costs for infrastructure and operations.

Given these dynamics, the current market participants must develop a clear, tiered pricing structure that aligns consumers' willingness to pay and increased costs of premium content. For platforms specializing in expensive sports like football, a low monthly subscription fee of €9.99 is not feasible. This highlights the current market offering of Sky and DAZN that range from €35.99 to €44.99. Alice Mascia, head of DAZN Germany, stated that DAZN expects to be profitable for the first time in the second half of 2024, following increased price increases from €14.99 to €44.99 among other operational changes (Jörgensen & Bossmann, 2024). A reduction of the subscription fees could be realized by offering a new base subscription with an interesting choice of sports and enabling the consumer to buy premium additions such as 4K Streaming quality, further analysis, exclusive events or documentaries. This would allow consumers to tailor their subscriptions, while providers could offset the high cost of content. Moreover, for major events such as the "superbowl" a TVOD option will be offered to generate further revenue. On the contrary, providers that are focused on niche sports face lower licensing costs and can therefore easily sustain low level prices.

Types of Competition

The type of competition was valued as the second most important attribute in the conjoint analysis. It is crucial to the success of the platform, as it directly drives the consumers' demand, competitive positioning as well as generated revenue. This aligns with insights of the experts Wolfgang Schröjahr (RTL News) and Alexander Mölders (Sky Germany), who would even place the importance level of content higher than pricing (Mölders, 2024; Schröjahr, 2024). Exclusive rights to attractive sport competitions work as a unique selling proposition, enabling the platforms to differentiate themselves in a competitive environment. In terms of the content, the German Sport streaming market is regarded as unique through its high football dependance, as mentioned in the literature review. 76% of the respondents actively follow football, making it the most popular sport in the German market. Winter sport is in the second position with an attraction score of only 29% (Bocksch, 2024). Besides the type of sport focus, the choice of competition type is of central importance. As outlined in the discussion of the conjoint survey results, domestic leagues enjoy the highest reputation, followed at a greater distance by international competitions. In particular, the younger audience, aged 18-24, prefers the national competition, whereas the 25 to 44 years old show more diverse interest in the national and international competition.

In relation to this, the ownership of the temporary rights to stream matches of the Bundesliga, 2. Bundesliga and national cup will lead to a high value proposition. For instance, Sky, who currently possess the core Bundesliga rights, is eager to secure these rights for the next period of time, as none of its other categories such Formula 1 or the premier league generate not a quarter as good viewer number (Jörgensen & Bossmann, 2024). In the international context, the Champions League is the ultimate, followed by the Europe and the Conference League. However, according to expert Alexander Mölders, the involvement of national heroes, meaning German teams in international competitions is decisive (Mölders, 2024). Consequently, the ownership of football provides access to broad spectator numbers, though it relates to high costs as well as competition with established and financially strong players. The focus on other national competitions such as basketball and the DAIKIN Handball league or the easycredit Basketball Bundesliga will claim lower licensing cost, but also reach a lower audience score. Therefore, a wider scope of sport events must be offered by a company focused on that niche, shown by MagentaSport.

To succeed in the competitive German sport streaming market, prioritizing national competitions within the ten most viewed is essential. Additionally, international competitions featuring German teams or athletes is important pillar for establishing a competitive and respective player in the market.

Content Format

The rise of streaming has transformed consumers sport consumption, driven by technological advances that improve convenience and extend variety of content formats. These include on-demand videos, live events and highlights or documentaries.

According to the conjoint analysis results, live events constitute by far the most preferred option. The thrill of unpredictability and the immersive experience of real-time action elevate supporter engagement, making live coverage an indispensable asset for streaming providers. Whereas on-demand content, highlights or documentaries hold secondary importance and rather serve the purpose of supplementary content. The conjoint analysis showed negative preference levels for these formats across all providers, indicating that they do not drive primary demand but still contribute to audience engagement. As seen with the Netflix documentary “Drive to survive”, mentioned in chapter 3.3.2, such content can appeal to a new consumer and reinforce the attachment to the existing community.

To maximize the potential of the sport streaming market, providers should adjust their strategic orientation towards the three following steps. Firstly, the main objective is to deliver as well as enhance the streaming of live events, thereby satisfying key consumer needs. Secondly, highlights as well as documentaries serve as complementary content to live events. These formats will increase the platform usage frequency and enable further consumer engagement. Finally, the providers must constantly innovate and create new content, based on current market and changing consumer perceptions. A lack of development would result in a loss of market share in a fiercely competitive market.

Consumer Engagement

Another crucial measure to achieve profitability in the sport streaming market is to enhance consumer engagement, due to its direct implication on viewer satisfaction and retention. Technological advances like VR and high-speed internet have impacted the viewer experience by encouraging closer relationships between the audience and their favorite team or player (Liu et al., 2024). While markets such as China or USA are at the forefront of including innovations like AI or personalization, the German sport streaming market is situated in its early stages.

A first recommendation for enhancing consumer engagement is to enlarge the 4K Ultra HD streaming quality for high profile matches such as the Bundesliga games on Saturday evening, Champions League matches or the Wimbledon final. As seen in the conjoint analysis viewer evaluate the significance of the quality with at least 8.5% across all brands and clear visuals as well as smooth movements lead to a more immersive experience. In addition, the granting of limited control to different camera angles would lead to a more fiercely connection with the game. The consumer could switch between varying modes such as “player-follow” or “behind the goal view” and therefore increase his engagement (Schmidt et al., 2023). These measures align with Cosm, the mentioned trend of the expert Alexander Mölders. Cosm is a newly opened experimental Hub in Los Angeles, where revolutionary technology makes the viewer feel like he/she is sitting courtside at an NBA Game (Mölders, 2024).

The providing of live-data graphics, that are constantly visible while watching the game represents another recommendation (Schmidt et al., 2023). Nowadays, streaming services provide access to typical game-related statistics such as the “ball possessions”, “shots/throws on target” as well as some player-related statistics such as the “number of goals in the last matches”. Technology advances and the increase of data availability will provide more in-depth information on player/teams such as health data leading to further analysis as well as discussions among the participants. Chatbots, as described by the expert Wolfgang Schröjahr, provide additionally the opportunity to explain severe set of rules or complex game situations. This can even be more emphasized by AR. Due to these extensions consumers will be better integrated and able to understand the game (Schröjahr, 2024).

Finally, consumer engagement can be improved by offering additional “behind-the-scenes” footage, documentaries of specific players/teams and highlight clips tied to live-events. This type of content is provided to the viewer, based on their personal viewing habits and can increase his loyalty level. It gives spectators authentic insights about their favorite team or athlete. Moreover, entertainment-based content appeals to a broader audience, including females’ viewers in a male-dominated market such as football.

Leveraging the Digital Transformation

To play a further role in Germany’s dynamic as well as competitive sport streaming market, constant adaption to digital trends and shaping the company’s own transformation is crucial.

Based on the literature review, AI determines one of the key digital trends that can further disrupt the market. According to the experts of RTL News and Sky Germany (Mölders, 2024; Schröjahr, 2024), AI currently finds its purpose in the content delivery support (Highlight clipping), the achievement of production efficiency and the combat of illegal streaming (Watermarks). However, there is still potential for expansion here. The cited study of the WHU

Otto Beisheim school of Management exhibits for instance potential in the work with automated cameras utilizing AI. These automated cameras will understand and spot the needs of a director, making a cameraman non-essential (Schmidt et al., 2023). In addition, algorithms are likely to take over repetitive duties in logistics to leverage cost potentials (Schmidt et al., 2023). However, the application of AI in improving the user-experience is rather subordinate. Thereby, the interlinking between live events and bonus-content (documentaries) through personalized recommendations offers a great opportunity and increases the utilization time. Moreover, the platforms must emphasize the usage of AI for providing personalized data/graphics, enabling more captivating and less intrusive storytelling (Schmidt et al., 2023). The important user engagement can thus be raised to another level.

Data Analytics is another key driving trend, as it constitutes the foundation for personalization as well as optimization purposes by tracking viewer behavior, preferences and engagement metrics in real time. Although the conjoint analysis examined personalization's current importance relatively low, it offers significant future potential for driving viewer engagement. For instance, "personalized broadcasts" could allow viewer to actively select the statistics and data they want to retrieve during the game (McBride, 2024). Consequently, the users can tailor their own viewer experience and deepen engagement.

Furthermore, data analytics ensures the future operational efficiency of the platforms. Investments in advanced data analytics tools such as Google Analytics 4 or Adobe Analytics, that track user interactions across the platforms and allow segmentation, can optimize their content and engagement strategy. By identifying peak viewing times, relevant competitions, demographic patterns and user-content-interaction, streaming platforms can program structuring and content acquisition to adjust to consumer preferences. These measures not only increase viewer satisfaction, but also optimize profitability and ensure sustainable growth.

Group Part

Individual Brand Overview

After outlining strategic actions for the sports streaming market, these recommendations are tailored to the specific positioning and challenges of the five selected brands: DAZN, Sky/WOW, Amazon Prime Video, RTL+ and MagentaSport. Each brand's unique strengths and areas for improvement, as identified through the research and analysis, are addressed to provide concrete, individualized recommendations to guide their strategic development within the market.

With DAZN as the leading platform, the perceived connection with the terms "credible" and "high-quality" is obvious. The platform convinces with some exclusive rights to for popular competitions such as Bundesliga as well as Champions League, combined with an innovative platform design. However, the increased monthly subscription fee of €44.99 leads to affordability challenges for many consumers. To overcome these challenges, DAZN could enter strategic alliances to avoid exclusivity restrictions. In addition, the introduction of TVOD pricing model, where the consumer pay per view, could facilitate access to the games.

Sky/WOW shares similar attributes to DAZN with its positioning between reliability and credibility, although to a lesser extent. With its long-term content focus on Bundesliga, 2. Bundesliga and Formula 1, Sky has established itself among the biggest players in the market. However, with a monthly fee of €35.99, Sky/WOW lacks a commitment to the value for money attribute. Ensuring the current Bundesliga and 2. Bundesliga right is crucial to justify the pricing. Moreover, the content extensions by transmitting of champions league through partnerships with DAZN can be useful. Consequently, the expansion of the content and the decreased costs will improve the value proposition for consumers.

In contrast to the previous brands, Amazon Prime Video stands out with its value for money strategy. Its international offering of selected Champions League Games and Wimbledon tennis matches for a monthly pricing point of €8.99 wins over the audience. However, the brand is not associated with emotional engagement such as passion and trustworthiness, which are the main challenges. Especially, the further integration of data analytics to provide the audience with interesting as well as visualized live graphics with in-depth information on athletes/teams and the advanced usage of personalization to link additional content (Highlights) with the preferred sport of the consumer are significant.

Finally, RTL+ and MagentaSport, have high potential for improvement due to their weak focus on both dimensions of the perceptual maps. The niche market focuses with MagentaSport transmitting minor leagues such as the 3. Bundesliga and RTL+ broadcasting less attractive international leagues like UEFA Europe League reveals boundaries. To further improve their market position, both brands should evaluate their investments in high-profile events such as Bundesliga or Champions League to gain a wider audience. Another possibility could be the concentration on different but emerging niche markets like the NFL or MMA.

5.3 Limitations and Implications for Future Research

Throughout this research, several limitations have emerged that warrant discussion. A grid summarizing the limitations of each tool used in the thesis is included in the appendix to provide a clear and concise overview (*see Appendix 6; Table 30*).

Beginning with the *literature review*, this study adopted the approach outlined by Haddaway et al. (2020), who identified eight concerns regarding the scope and quality of a literature review: timeliness, comprehensiveness, breadth, relevance, currency, exclusion, authority and availability. While the approach used in this thesis is slightly different, Haddaway et al.’s methodology provided a guiding structure to systematically frame the review. Of the concerns identified, relevance, comprehensiveness, currency and availability were of particular importance and are detailed below. *Relevance* was a challenge due to the limited availability of literature specifically focused on the German sports streaming market. While peer-reviewed articles and credible industry reports were prioritized, some studies were only tangentially relevant to the specific context of German consumers. Future research could address this by including grey literature, such as industry white papers or localized market studies, to provide more directly applicable insights. *Comprehensiveness* was also a concern, as focusing solely on sports streaming excluded valuable parallels from adjacent sectors such as general video streaming or other subscription-based services. A broader interdisciplinary approach in future studies could better capture consumer behavior and industry strategies by incorporating related fields. *Currency* was a key issue given the rapid evolution of the sports streaming industry. Despite using the most recent research available, rapid technological advances and changing consumer preferences mean that some findings may already be out of date. Future research could include longitudinal studies or the latest industry reports to ensure more timely and accurate analysis. Finally, the limited *availability* of high-quality, region-specific research was a challenge, reflecting a wider gap in the academic literature on the German sports streaming market. This limited the depth of the research and its ability to fully capture local market nuances. Primary data collection, such as surveys or interviews, could fill these gaps and provide regionally relevant insights in future studies.

The *expert interviews* provided valuable insights into the German sports streaming market but were subject to several limitations. The *small sample size* of four interviews limited the diversity of perspectives and the ability to capture the full complexity of the industry, including regional trends or niche competitors (Cao etal., 2024). Increasing the number and range of interviews in future studies could improve representativeness and provide deeper insights. *Organizational bias* was another limitation, as the findings reflect company-specific priorities, such as ARD’s focus on open access. The inclusion of neutral observers, such as industry analysts, could provide more balanced perspectives. There was also a *sampling bias*, as the experts selected may not fully represent the diversity of the industry, particularly smaller platforms or non-traditional players. Broader sampling criteria could mitigate this problem. *Confidentiality restrictions* further limited the findings as participants were unable to share sensitive strategic information. Anonymizing responses and offering incentives in future research could encourage more open participation. In addition, *communication biases* during the interviews, such as vague responses or misunderstandings, may have influenced the results. Future studies could address this through clearer wording of questions.

In addition, the *pre-survey*, which was designed to uncover some attributes for the conjoint analysis, provided valuable insights but also had some limitations. A key limitation was the *small sample size* (50 responses), which, combined with an *over-representation* of males (80%) and individuals aged 25-34, limits the generalizability of the findings to other demographic groups within the German sports streaming market. Furthermore, the reliance on personal networks to distribute the survey introduced a potential *selection bias*, as the sample was likely to be made up of active sports streaming users, neglecting non-users or casual viewers. This bias was compounded by the *dominance of DAZN* in the responses, with 86% of participants identifying it as their primary platform. As a result, the results may have been skewed towards attributes associated with DAZN, such as live event availability and pricing flexibility, while potentially overlooking features that are important to users of less represented platforms. Future research should prioritize larger and more demographically diverse samples to ensure greater generalizability across the German sports streaming market. To balance platform representation, future studies could oversample users of smaller or niche platforms to reduce the dominance of major players such as DAZN. Additionally, pre-survey designs could incorporate quotas or weighting mechanisms to balance respondent demographics and platform usage. For more in-depth qualitative insights, focus groups or interviews could be conducted to better understand the reasons behind attribute preferences and consumer decision making.

The *conjoint analysis* used in this study had several limitations. First, it was *limited to six attributes*, as recommended by Orme (2002). While this simplifies the analysis, it risks excluding important factors that influence consumer decisions. Future research could include additional attributes for a more comprehensive understanding of consumer preferences and the complexity of decision making. Another limitation was the *choice of price levels* (€9.99, €24.99 and €39.99), which did not fully reflect actual market prices, potentially biasing the results on consumers' price sensitivity. Future studies should include a wider range of price levels that reflect the current market landscape for more realistic insights (Hussain et al., 2024). The *demographic bias* of the sample, influenced by distribution methods on platforms such as Instagram and WhatsApp, resulted in an overrepresentation of young, tech-savvy males (72.1%), limiting generalizability. Diversifying distribution channels and using stratified sampling could ensure a more balanced representation across age, gender and income groups. The reliance on the *assumption* that participants make *purely rational choices* in conjoint analysis is another limitation. It may overlook emotional, trend-driven or situational factors that influence consumer behavior. Future research could incorporate qualitative interviews or experimental methods to capture these nuanced aspects. In addition, the *simplified scenarios* used in the survey may not fully reflect the complexity of real-world subscription decisions in a competitive market. To address this, future studies could use more dynamic and realistic choice models to reflect the multifaceted decision-making processes. *Respondent fatigue* or *disengagement* caused by the complexity of rating numerous brand attribute combinations may have affected the quality of responses. Simplifying survey designs, using adaptive conjoint methods or pre-testing survey lengths could mitigate this problem in future research. Finally, the analysis assumes that *attributes* act *independently*, which may oversimplify the interplay between factors such as price and streaming quality, or content variety and personalized recommendations. Advanced analytical models, such as hierarchical Bayes or interaction-based utility estimation, could better capture these interdependencies (Agarwal et al., 2014; Heavens & Models, 2018).

The *perceptual map* analysis conducted in this study has several limitations that may affect the interpretation and applicability of the results. First, the analysis was based on a *pre-defined set of attributes,* such as competence and value for money, which may not encompass all factors influencing consumer perceptions, particularly emerging trends such as sustainability (Fripp, 2023). Future research should explore additional attributes through qualitative studies to align with evolving consumer priorities. Another limitation was the demographics of the sample, which was skewed towards younger, more educated participants, particularly students. This *demographic bias* limits the generalizability of the findings to older or less educated groups. Stratified sampling could address this issue and ensure broader representation. *Reducing the data to two components* simplifies the analysis but may miss complex relationships between attributes and secondary factors (Fripp, 2023). Future studies could include additional dimensions or use more nuanced mapping techniques to gain deeper insights. The *static nature* of the analysis does not reflect dynamic market changes, such as new platform launches or shifts in consumer behavior. Longitudinal studies or real-time data collection could better capture these trends. Furthermore, the analysis did not fully explore *competitive interactions,* such as switching behavior between platforms such as DAZN and Sky, which is often influenced by overlapping subscriptions or exclusive content. Future research could incorporate conjoint mapping or game theory models to analyze these competitive dynamics. Finally, some *attributes,* such as familiarity and reliability, may *overlap,* reducing analytical clarity (Fripp, 2023). Pre-testing or refined factor analysis could address this redundancy. By addressing these limitations, future perceptual mapping studies could provide more comprehensive and actionable insights for the sports streaming market.

In conclusion, the limitations of this study highlight the complexity and evolving nature of the German sports streaming market. Methodological limitations such as sample bias, scope of attributes, and exclusive focus on the German market affect the generalizability of findings to other cultural or regional contexts (Agarwal et al., 2014). Future research should address these gaps by conducting comparative analyses across multiple markets and exploring regional differences in consumer behavior to enhance applicability. In addition, the reliance on online surveys introduced potential biases by excluding less tech-savvy respondents and limiting the diversity of the sample. The use of mixed methods, such as combining online surveys with offline data collection, can improve inclusivity and representativeness. As technological advances and shifting consumer priorities reshape the sports streaming landscape, future studies should adopt innovative approaches, including longitudinal data and advanced analytical models, to capture dynamic market trends and interdependencies to ensure relevance and strategic adaptability.

6 Repositioning Strategy of Amazon Prime Video

The following part outlines the development of a realignment positioning strategy for Amazon Prime Video in the German Sport Streaming market. The foundation of the strategy development is the "Business Unit Strategic Planning Process" of Kotler and Keller (2016) (Figure 6), which provides a structured seven phase method to strategic planning. To increase its rollout relevance for the German Sport Streaming market, the process was adjusted and streamlined into six phases, complemented by frameworks like Porters' generic forces, STP (Segmentation, Target & Positioning) and Marketing Mix. This structure ensures a comprehensive presentation of actionable execution steps, while providing a clear reading flow.

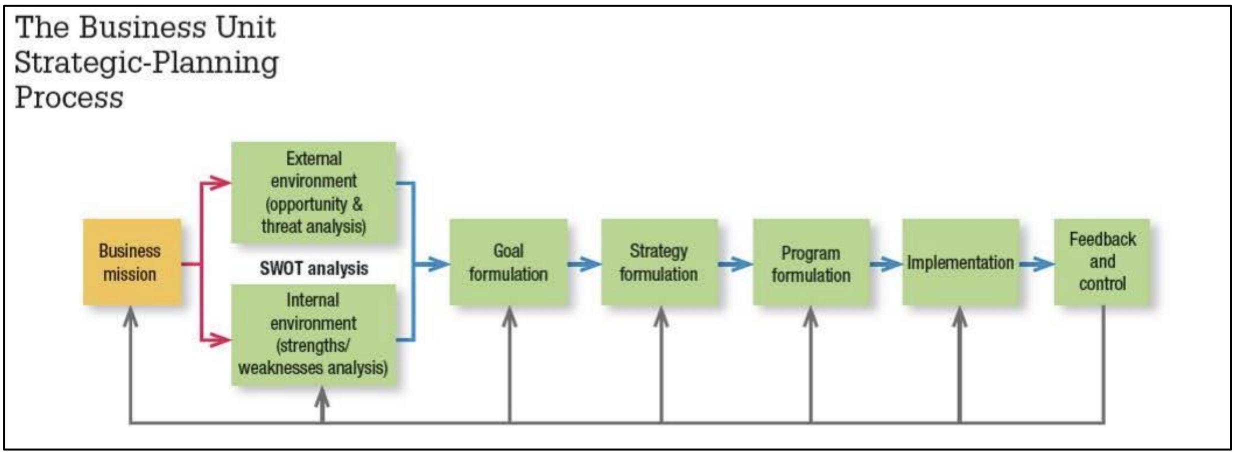

Figure 6 - Business Unit Strategic: Planning Process (Kotler & Keller, 2016)

Based on the previous literature review as well as the conducted analysis Amazon Prime Video was selected for the strategic roll-out process (comprehensive plan for the launch of the strategy). Due to its substantial financial strength, the limited amount of sport contents currently offered and its high level of awareness among consumers, Amazon Prime Video provides the perfect framework to realign its positioning strategy in the growing sport streaming market. Additionally, consumers currently associate Amazon Prime Video primarily with the attribute "value for money", because of its comparatively low price and bundled offering. However, in a market, where emotional connection defines long-term loyalty, reinforcing attributes such as passion and trustworthiness is important. In the following the Business Unit Planning Process will be applied to guide this strategic initiative.

Determine a Business Unit mission

Despite the declining growth, Germany still has a strong purchasing power strength, large population, the significant reputation of its football market and the unique cultural significance of sports, the German sport streaming market represents a cornerstone for the strategic orientation of streaming providers in Europe (GlobalData UK, 2023). Due to these attractive market conditions, it is essential to adapt the strategic positioning of Amazon Prime Video to achieve a higher market penetration and capture decisive market shares.

The initial step in the business unit planning process is to formulate a mission for the business unit - in this case for the German sport streaming market. This mission must be aligned with Amazon's overreaching corporate mission "to be Earth's most customer-centric company" (Amazon, 2024d). Moreover, the corporate mission is driven by four central pillars "customer obsession rather than competitor focus, passion for invention, commitment to operational excellence, and long-term thinking" (Amazon, 2024d).

Building on these guiding principles, Amazon Prime Video has established its own mission: "To give consumers the world's best-in-class digital video customer experience" (Prime Video and Amazon Studios, 2017). Adapting this to the German sport streaming market, the mission is defined as: "Capture a broader audience and become the provider of choice for sport streaming content that embrace the viewer through innovative engagement and usage of cutting-edge digital technologies."

Situation Analysis

To develop strategic objectives for Amazon Prime Video's realignment positioning strategy the German sports streaming market, it is essential to analyze both the internal and external environment along with the competitive landscape (Kotler & Keller, 2016; Porter, 1980). Kotler and Keller (2016) identify SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis as a valuable tool for assessing both internal and external factors, providing insight into a company's position in the market. While SWOT covers a company's internal capabilities and external opportunities and threats, Porter's Five Forces (Porter, 1980) focuses on the external competitive environment, analyzing factors such as competition and the power of suppliers. In this chapter, both models will be used with the help of the information obtained from the previous analysis of this thesis to provide an overall situation analysis of Amazon Prime Video in the German sports streaming market.

The position of Amazon Prime Video in the German sports streaming market shows a number of strengths and opportunities, but it also highlights some key challenges and threats *(see Appendix 4; Figure 7)*. As seen in the perceptual map analysis, a *Strength* of Amazon Prime Video is its value for money, with an attractive subscription price of €8.99/month and access to premium international sporting events such as Champions League matches and Wimbledon (Amazon Prime Video, 2024a; Amazon Prime Video, 2024b). Its integration into Amazon's broader ecosystem and strong technical capabilities provide a solid foundation for further growth. For instance, the server business is home to a third of the global cloud-based business, indicating the power of Amazon's infrastructure and its ability to drive success (CNN Business, 2018). However, the perceptual map analysis also shows that Amazon Prime Video lacks emotional engagement. This could be due to the small amount of football content (especially national leagues such as the Bundesliga) and the general lack of a sports-focused identity of the streaming platform, which limits its connection with passionate sports fans. This is compounded by niche sports coverage and strong competition from dedicated platforms such as DAZN and Sky, which is a *Weakness* in the SWOT analysis.

There are *Opportunities* to improve personalization and regional relevance by leveraging advanced data analytics and expanding local sports offerings. Especially, an improved personalization between watched live events and relevant bonus content such as highlights, or behind-the-scenes material could significantly increase the engagement on the platform *(see chapter 3.3.1)*. Marketing efforts that build emotional engagement and brand trust could further align Amazon Prime Video with consumer expectations. However, these must be pursued while addressing *Threats* such as rising licensing costs, intense competition and price-sensitive consumer behavior (Jaeger et al., 2023). Addressing these challenges through strategic investments in content, technology and targeted marketing could help Amazon Prime Video strengthen its market position and appeal.

To provide a more external view the addition of Porter's Five Forces (1980) will help to identify the key structural characteristics of Amazon Prime Video that define the strength of the competitive force and thus the profitability.

Amazon Prime Video faces strong *Competition*, with dominant players such as DAZN and Sky/WOW leading the market (Statista, 2024h). These competitors have strong brand associations with sports, making it difficult for Amazon Prime Video to gain emotional engagement with fans. Regarding the *Threat of new Entrants*, Amazon Prime Video need not be overly concerned, as the market requires high initial investments in content licensing and technology *(see chapter 2.3)*. However, established streaming platforms such as Netflix and Disney+, which already have a robust streaming infrastructure and financial stability, could pose a significant challenge. For example, Netflix has secured the rights to stream parts of WWE in the US for the next 10 years, demonstrating their ability to enter and potentially disrupt the sports streaming market with niche or high-profile offerings (Burrows, 2024). An important issue is the *Bargaining Power of the Suppliers*, which is very strong as the suppliers (sports leagues and associations such as the DFL) have considerable power due to the high demand for exclusive rights. Rising licensing costs also make it difficult for Amazon Prime Video to secure premium content (DFL, 2024a). For example, the DFL recently announced a €1.121 billion media rights deal for the 2025/26 to 2028/29 cycle, an increase of 2% from the previous cycle (DFL, 2024a). In contrast, France's Ligue 1 faced difficulties in 2023 when the rights auction had to be cancelled due to insufficient bids (Nahar, 2023). In addition, *Consumers* also *have strong bargaining power* due to the wide range of platforms available. As seen in the baseline simulation, price sensitivity and expectations about the type of competition (type of content) make it essential for Amazon Prime Video to differentiate itself. Finally, the *Threat of Substitution* in the German sports streaming market is moderate, as exclusive content rights such as those for the Bundesliga limit direct alternatives for fans of these events *(see chapter 3.5.2)*. However, consumers who are less loyal to specific leagues or sports may still turn to alternative entertainment options such as general streaming platforms, social media highlights or free-to-air channels covering fewer premium sports (Deloitte, 2019).

Goal Formulation

After evaluating the internal as well as external environment through the performance of the situational analysis, Kotler & Keller (2016) mentions the formulation of strategic objectives as the following crucial step of the planning process. These goals should be arranged in a hierarchy, from most to least important, and should be quantitative whenever possible, realistic and consistent (Kotler & Keller, 2016). With relation to the realignment positioning strategy of Amazon Prime four core objectives were derived that should level the success of its realization.

Strengthening the market positioning in the German sport streaming market constitutes the *first objective* of the new strategy. This will be achieved through the acquisition of high-profile as well as national sport content such as the Bundesliga, addressing new consumer segments and the expansion of customer engagement. In order to drive growth and maintain competitiveness, achieving a 5% market share increase within the first two years is crucial. As highlighted in the PWC study "German Entertainment & Media Outlook 2024-2028" the sales performance of Over-the-top content services were valued at €4.1 billion and is expected to increase to €5.8 billion by 2028 (PwC, 2024a). Although publicly available date on the exact share of the German sport streaming market is limited, industry analyses indicate that sport rights account for 32% of OTT-services revenue (SportProMedia, 2022). In consideration of possible fluctuations, the conservative estimation of 25% (Based on the valuation of €4.1 billion and €5.8 billion in 2028) is made, resulting in figures of €1.025 billion in 2023 and €1.45 billion by 2028. Consequently, a market share increase of 5% would equal around €51.25 million in 2023 rising to €72.5 million by 2028 within the sport streaming market. Given Amazon's strong presence and extensive resources, this target is ambitious yet realistic.

The *second objective* of the strategy is *the expansion of sports content variety through the addition of national heroes*. Amazon Prime currently offers its German costumers international focused content through the live access to Wimbledon Championships and the top match in the Champions League on every Tuesday (Amazon, 2023). As the conjoint analysis and the expert interviews have shown, national content and the presence of national heroes is crucial for the further growth in market share as well as popularity. Consequently, the strategy aims to expand the sport portfolio by acquiring an exclusive right for high-profile competitions that involve national heroes (Mölders, 2024) such as the Bundesliga or the ATP tournament Roland Garros with the participation of Alexander Zverev (second in the world ranking; status quo: September 2024). To justify investments, run an effective competition and generate audience growth, it is essential to reach an average of 850.000 viewers per broadcast. This objective is due to two points achievable. On the one hand, Amazon benefits from its general popularity, highlighted by the previously mentioned Nielsen study, in which Amazon Prime Video was selected as the most frequently used platform with 56% (Reimann, 2024). On the other hand, high-profile games attract a large audience, as DAZN shows. The match between Bayern and Frankfurt, for instance, reached a convergent net reach of 1,421,000 viewers and even the less interesting game between Heidenheim and Leipzig achieved a convergent net reach of 401,000 viewers (DAZN, 2024b; DAZN, 2024g).

Increasing the target audience is the *third objective*. As examined by the previous conjoint analysis three main segment groups: younger viewers aged 18-24, middle-aged viewers aged 25-44 and older viewers aged 45+ can be identified for the sport streaming market, which will be described more deeply within the strategic formulation. As seen in the analysis, the groups of younger viewers (aged 18 to 24), and middle-aged viewers (aged 25 to 44) represent the most crucial target group. Therefore, Amazon Prime Video should strive to increase its number of sport-focused subscribers in the mentioned target groups by 500,000 within the first year. With reference to the estimated sport streaming market volume of €1.025 billion (2023) and an estimated Amazon's consumer base of 13.8 million users, meaning a conversion of 3.62% of the existing customers, the objective is realistic (Spiegel, 2022).

Finally, *enhancing consumer engagement by expanding interactive, personalized and exclusive content* represents a further key objective. This will be achieved by integrating real-time statistics, increasing the offering of behind-the-scenes content and ensuring personalized linkages between live events as well as add-on content. Interactive elements such as real-time data or multi-angle camera perspectives could impact consumer immersion and satisfaction of the consumers within the first year (Schmidt et al., 2023). By delivering engaging as well as immersive experiences, a deeper connection between the platform and the audience could be encouraged. In addition, the feature usage frequency must increase by 20%, driven by add-on content such as behind-the-scenes or documentaries. The increasing popularity of lifestyle content among the global target demographic, with at least 38% of individuals aged 18 to 40 showing interest in such content (YouGov, 2023).

Strategic Formulation

The strategic formulation (i.e. strategy) transfers the objectives into a concrete plan (Kotler & Keller, 2016). Every company needs to develop a strategy to achieve its goals, consisting of a marketing strategy, a technology strategy and a sourcing strategy. For this purpose, Porter's generic strategies - total cost leadership, differentiation and focus - provide a solid framework for strategic thinking *(see Appendix 4; Figure 8)* (Kotler & Keller, 2016).

In line with Porter's framework, Amazon Prime Video should adopt *a focused differentiation strategy* for its repositioning in the German sports streaming market (Porter, 1980). This strategy focuses on providing high-profile football content, through the acquisition of exclusive rights to the Bundesliga Package A. This right package is one of sixteen (A to P), awarded by the DFL for the German-speaking media region. Each package provides exclusive broadcasting rights for various Bundesliga content for a total of four consecutive seasons. It consists of the broadcasting rights for the Saturdays Bundesliga conference (DFL, 2024b). It is the most popular format, which allows the "(…) switching to most exciting scenes in up to five concurrent Bundesliga matches, from scoring chances and shots at goal through to thrilling tackles and other dramatic events" (DFL, 2023).

This offering not only covers football, the most attractive sport in Germany, but also directly addresses the consumer preferences identified in the conjoint analysis, such as the broadcasting of live events and the focus on domestic leagues. It gives Amazon Prime Video the possibility to differentiate itself within the target audience of young football enthusiasts, including both casual as well as hardcore viewers and to stand out in a competitive market, currently dominated by established players such as DAZN or Sky/WOW.

The attractiveness of the Saturday conference, with viewership estimates ranging between 750.000 to 1.130.000, comes with significant costs, estimated between €140 million to €168 million per season. Due to the absence of explicit viewing figures, this range is derived from data provided by the DFL in 2021 and more recent findings by AGF Videoforschung in cooperation with GfK in August 2024 (DFL, 2021; Weis, 2024). Similarly, the specific cost of the Saturday conference package is not disclosed, as the DFL publishes only total costs of the Bundesliga media rights per season.

As no explicit figures are available, the estimate is based on publicly available total costs of Bundesliga media rights (DFL, 2021) and the relative importance of the Saturday afternoon slot in the overall program, featuring typically five out of nine games (DFL, 2023). The assumed share of around 50% of total costs (of the €1.121 billion, see DFL, 2024a), around €561 million per season, is due to the central position of the time slot in the Bundesliga match schedule.

Within this slot, the conference package (package A) and the individual matches (package B) likely share the value. Since the Bundesliga has consistently generated considerable ratings and has a central role in the broadcasting schedule (see DFL, 2021; Weis, 2024) an estimated split of 25% to 30% is assumed, and therefore the cost of the conference package is projected to be between €140 million to €168 million per season. Although no specific data is available, this assumption is supported by the importance of flagship packages in sport broadcasting, often accounting for a significant proportion of rights value. Similar examples like NFL RedZone show that premium formats are generally preferred for their ability to drive ratings, pricing and subscription value (Bushard, 2023).

Differentiation, as Porter suggests, reduces the intensity of competitive rivalry by fostering customer brand loyalty and reducing customer price sensitivity (Porter, 1980). For Amazon Prime Video, this means investing in unique football experiences that competitors cannot easily replicate. By leveraging its capabilities and prime ecosystem, Amazon Prime Video could offer features such as the expansion of interactive match statistics that go beyond current offerings

(Personalized data of the team/athletes), AI-driven personalized highlights (*see chapter 4.2)* and exclusive behind-the-scenes content such as behind-the-scenes clips of top players or coaching staff *(see chapter 3.2.2).* These features not only differentiate Amazon Prime Video from its competitors but also enable a more immersive and engaging viewing experience, that could reduce the price sensitivity and increase loyalty.

A key element of the strategy is to focus on specific consumer groups: young, tech-savvy sports enthusiasts aged 18-24, and slightly older sports enthusiasts aged 25-44 who will become loyal Amazon Prime Video customers once acquired. Amazon Prime Video could leverage existing Prime subscribers by promoting tailored sports content and bundling options to encourage these users to explore its sports streaming services. By catering to the preferences of younger tech-savvy streaming users and early adopters (e.g. by offering seamless mobile streaming or real-time interactive features), Amazon Prime Video could cultivate a loyal customer base.

In addition, this strategy allows Amazon Prime Video to deepen its engagement with its most lucrative market segments and build stronger emotional connections with its audience. By integrating sports content more prominently into Amazon Prime Video's ecosystem, it might drive cross-platform engagement, increasing customer retention and lifetime value (Chaffey & Ellis-Chadwick, 2019). For example, exclusive access to Bundesliga matches could act as a USP and attract football fans who are dissatisfied with existing providers such as DAZN or Sky/WOW.

This focused differentiation strategy not only allows Amazon Prime Video to grow its market share in Germany but also positions it as a leader in delivering exclusive, tech-enabled football experiences that meet the evolving expectations of its audience.

Segmentation, Targeting & Positioning (STP)

With specific goals and a strategic plan in place, Amazon Prime Video could now develop a competitive positioning strategy for the German sports streaming market by applying the STP process - Segmentation, Targeting and Positioning. This framework helps identify the most valuable customer groups and tailor strategies to effectively meet their needs (Kotler & Keller, 2016)

Market segmentation is the starting point of the process, dividing the market into distinct customer groups with similar characteristics (Kotler & Keller, 2016). Demographic, behavioral and psychographic factors can be used to segment the market (Kotler & Keller, 2016). Demographically, the market can be divided into three main groups: younger viewers aged 18-24, middle-aged viewers aged 25-44 and older viewers aged 45 and over. Younger viewers are characterized as tech-savvy, frequent streamers and early adopters of digital platforms. Middle-aged viewers tend to have an established income, are loyal football fans and are highly value oriented. Older viewers are less likely to engage with digital platforms but prioritize simplicity and reliability in their streaming experience. Given the existing popularity of Amazon Prime Video among millennials, the most attractive demographic segment is younger, tech-savvy viewers aged 25-40 (Statista, 2024d). This group is not only familiar with streaming platforms but also represents a highly engaged audience within Amazon's broader ecosystem. Beyond demographics, behavioral segmentation further refines the market into hardcore sports fans and casual viewers. Hardcore fans are heavily invested in live matches, analysis and in-depth football coverage, particularly Bundesliga and UEFA matches (Deloitte, 2023c). In contrast, casual viewers consume sport occasionally, focusing on highlights or major events. Psychographic segmentation adds a further level of insight, dividing the market into football fans who focus primarily on Bundesliga and UEFA Champions League matches, and general sports fans who enjoy a wider range of sports, including tennis and basketball. These well-defined segments form the basis for targeting.

Targeting involves selecting the most attractive customer group to focus on (Kotler & Keller, 2016). For Amazon Prime Video, the ideal target audience includes men aged 18-44, that are both casual and hardcore sports fans, but particularly football enthusiasts. This group is dominated by millennials, Amazon Prime Video's most engaged demographic (Statista, 2024h; Statista, 2024g). Early adopters are also a key focus due to their tech-savviness and interest in innovative platforms, which aligns well with Amazon's strengths and offers growth potential. By targeting millennials and early adopters, Amazon could leverage its technological capabilities to improve the user experience. Strategies such as offering exclusive access to Bundesliga package A and providing personalized recommendations cater to the preferences of this audience. This approach allows Amazon to engage its most promising demographic, differentiate itself from competitors such as DAZN and Sky/WOW, and strengthen its position in the German sports streaming market.

Beyond demographic targeting, Amazon Prime Video can further refine its approach by targeting behavioral segments, such as hardcore fans seeking in-depth content and casual viewers drawn to highlights. Psychographic insights, such as fans' emotional connection to Bundesliga matches or interest in innovative features, could also guide the strategy, ensuring deeper engagement and a tailored user experience.

A concrete value proposition that resonates with the target audience could emphasize Amazon's unique blend of affordability, enhanced football content and technological innovation. The unique value proposition (UVP) should be: "Amazon Prime Video brings football fans closer to the action with exclusive Bundesliga matches, cutting-edge streaming technology, and an affordable monthly subscription of €10.99. Our platform caters to young, tech-savvy sports enthusiasts and loyal fans looking for a premium football experience - all within the convenience of the Amazon Prime ecosystem."

Amazon Prime Video should have the following positioning statement: "For German football fans looking for premium yet affordable sports content, Amazon Prime Video offers exclusive Bundesliga rights and innovative viewing features. Unlike our competitors, we combine high-quality content with Amazon's broader entertainment and shopping benefits to create a seamless experience for every fan."

Marketing Mix

In this section, the key marketing activities necessary to implement the proposed marketing strategy will be outlined. These activities are structured around the well-established marketing mix framework, often referred to as the 4Ps: Product, Price, Place, and Promotion (Kotler & Keller, 2016). Each "P" represents a distinct element that together forms a cohesive plan to engage the target audience, deliver value, and achieve strategic objectives.

Starting with the *Product*, Amazon Prime Video remains an integral part of the Amazon Prime ecosystem, which includes a range of services like Sport & Video Streaming, Music Streaming, premium shipment and a changing offer of eBooks & eMagazines (Amazon, 2024a). The value of accessing this diverse bundle of services through a single subscription, with Amazon Prime Video serving as an anchor product, is appreciated by a lot of customers, seen by the high subscription number (Spiegel, 2022). Amazon Prime Video will continue to offer a diverse portfolio of movies and series, including classic titles, in-house productions and third-party content. However, there will be a growing focus on the provision of sport content, anchored by the acquisition of the Saturdays Bundesliga Conference - Package A. This exclusive offering reinforces Amazon Prime Video's position in the sport streaming market by covering two of the most attractive sport segments: football and tennis (*see chapter 2.1)*. Additionally, the inclusion of domestic live events with national heroes directly addresses consumer demand and appeals to key demographics such as: 18-to 24-year-olds and 25- to 44-year-olds. The product strategy is to provide an access to 2 simultaneous streams and further enhance the offering by an immersive viewing experience through innovations such as multi-camera views, real-time statistics as well as virtual reality integration. The planned use of ultra-high definition as a standard and new camera perspective, like the tested RefCam in the Bundesliga Supercup, provides the viewers with new insights (DFL, 2024c). Moreover, live statistics and personalized player analytics will enrich the viewing experience as well as create deeper connection with the content. Finally, Amazon Prime Video aims to increase engagement by creating a "home" for sport enthusiasts. This will be achieved by tailored game highlights, behind-the-scenes clips and documentaries, all powered by AI-tools. These features reinforce viewer commitment, enhance satisfaction and generate long-term loyalty. To better imagine how an interface of the adapted strategy of Amazon Prime Video might look like, *(see Appendix 4; Figure 9)*.

Pricing represents the next pillar of the Marketing Mix. As outlined in chapter 2.1. Amazon Prime Video currently offers a monthly subscription fee of only €8.99, a very attractive offer that is unmatched by the competition (*see chapter 2.1*). To finance the acquisition of the Bundesliga Saturday Conference - Package A and the planned enhancements of the viewer experiences, the subscription price will be increased to €10.99 per month. This adjustment is justified by the addition of high-profile sports content, as well as continued access to the Amazon ecosystem under one subscription. Furthermore, according to a Deloitte study, 80% of millennials are willing to pay more for a subscription if it covers everything they want (Deloitte, 2023b). The price increase is unlikely to result in a significant churn among the existing customer base of 13.8 million subscribers (Spiegel, 2022). Amazon Prime Video's broad offering, innovative features and the integration within the Amazon Prime Ecosystem ensure the attractiveness in the eye of the consumers. Furthermore, the price is still significantly lower than the competitors like DAZN (€44.99), Sky/WOW (€35.99) or even Netflix with its entertainment focus (€13.99) offering superior value for money (Imöhl, 2024). Consumers have also shown tolerance for price increases, as demonstrated by DAZN's price adaptations from €11.99 to now €44.99 in recent years (Imöhl, 2024). With a customer base of 13.8 million, the increase to €10.99 could generate an additional 331.2 million in annual revenue. Further revenue will be unlocked through advertising, with valuable slots available before, during halftime and after games. Amazon is also set to increase its amount of advertisement in 2025, providing brands with more targeted opportunities and further boost income (Thomas, 2024). To sum up, Amazon Prime Video will maintain its current bundled subscription model but will execute a price increase to mirror the added value of high-profile sports content and enhance viewing experiences. Additionally, Amazon Prime Video will offer Pay-per-View options for occasional games and extend its current student discount of 50% for a period of six months, making its service accessible to a wider audience (Amazon, 2024b).

In terms of *Place*, Amazon Prime Video needs to ensure widespread and seamless access across multiple platforms (Kotler & Armstrong, 2016). The goal is to create an omnichannel experience that allows users to effortlessly access content across smart TVs, mobile apps, Amazon Fire TV, gaming consoles and web browsers. For instance, a football fan should be able to seamlessly switch from watching a Bundesliga match on their smart TV to checking highlights on their smartphone while commuting. In addition, Amazon's integrated ecosystem plays a critical role in improving accessibility (Amazon Prime Video, 2024a). By leveraging existing Amazon platforms, such as Alexa for voice-activated sports updates and Fire TV for dedicated sports channels, users can enjoy a streamlined and engaging experience (Amazon, 2024b). For example, users can ask Alexa for live scores or set reminders for upcoming games, further integrating sports streaming into their daily routines. Finally, Amazon's extensive retail platform provides a unique opportunity for retail integration (PwC, 2024c). By promoting sports streaming services alongside related products - such as team merchandise, match-day snacks or even home cinema systems - Amazon can create a holistic experience for sports fans

(Amazon, 2024b). For example, a customer buying a Bundesliga jersey could be prompted with an offer for an Amazon Prime Video sports subscription, seamlessly integrating e-commerce with sports content.

The fourth pillar of the Marketing Mix is *Promotion*, where Amazon Prime Video needs to focus on engaging campaigns to attract millennials and younger audiences. Social media platforms such as Instagram and TikTok are key tools to reach this demographic, with content such as Bundesliga highlights, behind-the-scenes footage and short-form videos to capture their attention (Kotler & Armstrong, 2016). Dynamic social media engagement will be key to maintaining interest, using TikTok, YouTube and Instagram to share player interviews, match highlights and fan stories. For example, a viral TikTok series of top football moments could significantly increase brand awareness. Cross-promotion within the Amazon Prime ecosystem will also increase exposure (Chaffey & Ellis-Chadwick, 2019). Sports content could be promoted directly to existing Prime subscribers through personalized emails, app notifications and home page banners. For example, a customer shopping for sports merchandise on Amazon could receive a notification about the Prime Video sports bundle. Influencer marketing is another powerful tactic, using German football influencer Elias Nerlich or footballer Toni Kroos to create authentic and relatable content that resonates with younger viewers (De Veirman et al., 2017). In addition, Amazon could strengthen its promotional efforts by sponsoring major football events in Germany (Meenaghan, 1991). At these events, the company could offer exclusive streaming deals, free trials or branded giveaways to build stronger connections with local sports fans. Finally, referral programs such as “bring a friend” campaigns incentivize users to introduce new subscribers by offering rewards such as free or discounted months of subscription for both the referrer and the new user, thereby encouraging organic growth and increasing customer loyalty (Schmitt et al., 2011).

Feedback and Control

The feedback and control phase build upon the quantitative as well as qualitative objectives established during the goal formulation phase (*see "goal formulation"*) to evaluate the successful implementation and identify areas of adaptation. The determined Key Performance Indicators: market share growth, audience reach, number of new subscriptions and engagement metrics are used as benchmarks for measuring success. The continuous monitoring of the mentioned metrics ensures that Amazon Prime Video's repositioning strategy for the Sport Streaming market is in line with the consumer preferences and the market dynamics.

Additionally, insight from customer feedback, emerging market trends and strategic movements of the competitors could be considered to enable fast as well as iterative improvements. This approach will ensure the achievement of sustainable growth as well as long-term competitiveness.

The outlined strategy aims to reposition Amazon Prime Video as a leading sports streaming provider by leveraging its financial strength, value for money reputation and strong consumer awareness. The overall goal is to increase Amazon Prime Video's emotional engagement and credibility in the German sports streaming market by acquiring exclusive Bundesliga rights, targeting tech-savvy millennials and emphasizing attributes such as passion and trustworthiness. The key advantage of this strategy is that it combines Amazon's existing technological capabilities and ecosystem integration with a focused differentiation approach. By offering exclusive football content, such as Bundesliga matches, alongside innovative features such as personalized match statistics and behind-the-scenes content, Amazon Prime Video could create a unique value proposition that competitors such as DAZN and Sky/WOW cannot easily replicate. This approach strengthens Amazon's position, drives engagement and fosters loyalty, ensuring sustainable growth in the German sports streaming market.

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Appendix

Appendix 1: Literature Review

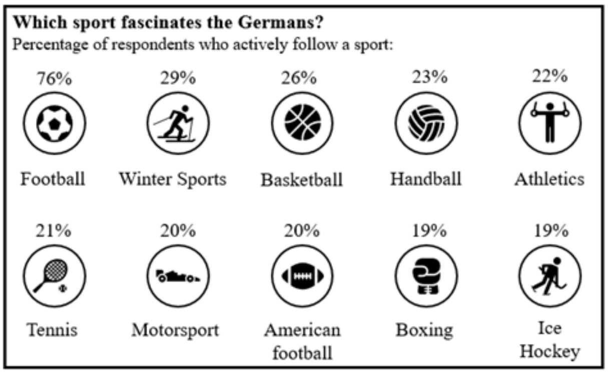

Figure 1 - Which sport fascinates the Germans (Bocksch, 2024)

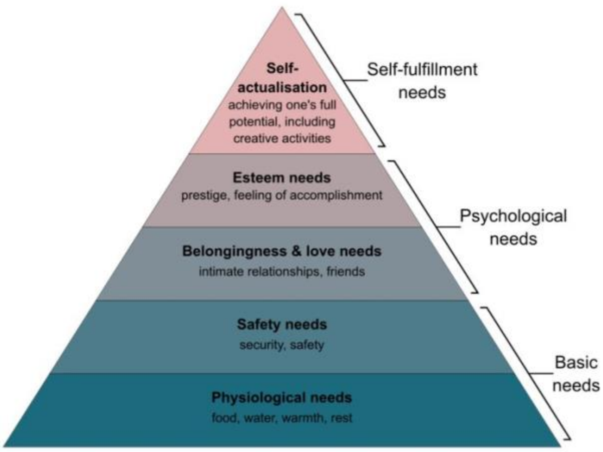

Figure 2 - Maslow's Hierarchy of Needs (Moss, 2020)

Brand	Offering	Price
DAZN	Bundesliga, La Liga, Champions League, French Open, Australian Open, NBA, Golf	€6.99 - €44.99 per month
WOW	Bundesliga, second Bundesliga, DFB Cup, Premier League, NHL, ATP World Tour, Formula 1-3, Golf	€35.99 per month
Amazon Prime Video	Champions League, Wimbledon, NASCAR (2025), NBA (2025), WNBA (2025); includes movies, series, music	€8.99 per month / €89.90 per year
RTL+	UEFA Europe, UEFA Conference League, Porsche Carrera Cup, NFL	€5.99 - €12.99 per month
MagentaSport	3. Bundesliga, women's Bundesliga, Euroleague Basketball, DEL (ice hockey)	€12.95 per month / €19.95 per year

Table 1 - Market reach and sports content portfolio (German Market)

Appendix 2: Expert Interviews / Exploratory Interviews

Name	Company	Field of Activity	Date
Veronika Catuogno	ARD	Editor	14/10/2024
Alexander Mölders	Sky Deutschland GmbH	Director of Concept & Performance	11/11/2024
Jan Götze	Sky Deutschland GmbH	Senior Communications Manager	12/11/2024
Wolfgang Schröjahr	RTL Group	Advisor and Consultant of Frank Rubens in the sports department at RTL News	13/11/2024

Table 2 - Experts for the Expert Interviews

	Editor	Director of Concept & Performance	Advisor and Consultant	Senior Communications Manager Sports	KEY FINDINGS	CATEGORY
INTERVIEWEE TARGET	Expert in Sport Streaming at ARD	Expert in Sport Streaming at Sky Deutschland	Expert in Sport Streaming at RTL News	Expert in Sport Streaming at Sky Deutschland		
Consumer preferences and behavior	*Viewers are highly selective. This holds true for digital users as well (...) Key factors like timeliness, relevance, and the presence of well-known athletes or important competitions are always attractive. (...) It's impossible to push viewers towards niche sports simply because they are offered as a stream. The user is very independent in their choices.*	*"The question is really about how user preferences have developed, and honestly, I'd say they haven't shifted significantly. In the end, customers still care about a few central points, with content being number one." "This is a question we deal with daily: how do customer preferences shift? How can we retain and acquire customers?" "Streaming appeals more to younger audiences. It's uncommon for someone aged 20-35 to be interested in a traditional TV package. Streaming has established itself, partly because of the influence of fiction streaming. There are many customers now familiar with Netflix or Amazon Prime who think, 'I could do this for sports as well.'" "Access in terms of package and contract structure is evolving toward more flexible, monthly options... This is something that has developed over the past few years, and within a few years, it will likely be the standard across the board."*	*The main change has been the shift in distribution methods (...) With the rise of the internet, users now have the choice to consume content via IP-based streaming services, on different devices like smartphones or laptops. This digital transition is the major change, with users now consuming content on the go, via streaming, instead of traditional TV (...)*	*We see the trend that more and more people are streaming, in addition to traditional linear channels (...) Often there is a desire for more flexibility, easy access, but also sometimes for short contract terms. We address these preferences with Sky Stream and WOW. While WOW tends to appeal to target groups that want uncomplicated and easy access to Sky content without long subscription periods, Sky Stream is aimed at target groups that want everything - Sky, free TV, apps.*	Across all platforms, there is a shift in consumer preferences toward flexibility, accessibility, and content relevance. Viewers increasingly favor streaming over traditional TV, prioritizing platforms that cater to on-the-go viewing and avoid long-term commitments, with younger audiences particularly drawn to these flexible, accessible options.	
	Viewers are selective and prioritize key moments in sports, like specific events in football or Biathlon. They value timeliness, relevance, and well-known athletes or competitions.	In general the consumer preference have not shifted significantly and streaming appeaks specifically to the younger audience. Customers value especially the content offered by the platform. Streaming has become established through the fiction of streaming and its increased familarity	The digital transition has led to users consuming sports content on the go, choosing streaming over traditional TV as distribution shifts from linear to IP-based platforms. This shift reflects the increasing flexibility and device variety that modern viewers expect from sports streaming services.	The shift toward streaming has grown as users seek flexibility, easy access, and short contract terms. Sky addresses these preferences through its platforms, Sky Stream and WOW, offering users the choice between comprehensive access and streamlined content without long commitments		
Pricing and accessibility challenges	*Everything is accessible for free. You don't need to register to access ARD's streaming services. There's only the general license fee, which covers TV, radio, and digital usage.*	*"Pricing plays a central role, and access in terms of package and contract structure is definitely evolving toward more flexible, monthly options... Content exclusivity is crucial, especially for major events, where consumers are willing to accept price jumps or a less-than-perfect user experience." "We're seeing providers like DAZN, who began with monthly streaming subscriptions, moving toward longer-term contract options... They're encouraging customers to choose these with significant price differences, pushing them toward a similar model to Sky's." "Content exclusivity is still the main attraction. It's built on unique events that a specific provider can offer. Consumers often tolerate price increases for exclusive sports content, even if the user experience is sometimes less than optimal."*	*No one likes to pay more, and the sports rights market is structured to maximize revenue for licensors (...) There's no real competition, as content is packaged so that users have no choice but to subscribe to different services for different rights (...) With big sports events like the Champions League, viewers must subscribe to multiple platforms like DAZN and Amazon to access all the content. This multi-subscription model annoys sports fans.*	*More and more Germans are paying for TV content, subscribing to an average of 2.4 services. We help with this dilemma through Sky Stream, uniting live channels, apps, and popular streaming services.*	Increased prices are generally accepted by consumers, when exclusive content co access to major events is offered. Flexible monthly subscpriptions are preferred by the consumers, while yearly plans are promoted through discounts. The nessity of multiple subscriptions to view events such as Bundesliga, caused by the high market fragmentation, frustrates the audience. Sky adresses that topic through content bundles that are available on one single platform.	
	ARD's streaming content is free, covered by a general license fee. There is no monetization or registration required, as ARD focuses on providing accessible content without paywalls. This is appreciated but limits ARD's ability to tailor recommendations.	Pricing plays a pivotal role in the evolving streaming landscape. Consumers are willing to accept price increased, when content exclusivity is offered especially for major events. Moreover, contract sturctures are becoming more flexible with montly subscriptions, while longterm options are promoted through appropriate price incentives.	Consumers are frustrated by the need for multiple subscriptions to access all desired sports content, particularly for major events like the Bundesliga and Champions League. This fragmentation forces fans to subscribe to different platforms, leading to a common annoyance among viewers.	Sky recognizes that German users are increasingly willing to pay for TV content, subscribing on average to about 2.4 services. Sky Stream's bundled model addresses the challenge of content fragmentation by consolidating live channels, streaming apps, and partner content into a single platform, offering price advantages through package deals.		
Role of technology / AI in enhancing user-experience	*A strong example of this is the multi-stream player we introduced during the Olympics (...). This tool significantly improved how users navigate streaming options. We're actively working on AI integration, but our approach differs from other platforms (...). We maintain a strong journalistic standard, so AI-driven content like match summaries still requires editorial oversight.*	*"We've partnered with WSC Sports for Automated Highlight Clipping, where they merge live game footage with event data, enabling us to generate and distribute clips very quickly. This has been incredibly valuable, as we can create thousands of clips with minimal effort, uploading them instantly across platforms." "We're also looking into transcription technology, which would enable us to create clips based on keywords or significant phrases... For example, after this call, we could have a few clips generated highlighting the key insights or most notable statements automatically. It has implications for speed and content creation efficiency."*	*Once they subscribe, AI and recommendation tools can help keep them engaged by suggesting additional content. However, sports streamers are not like big platforms such as Netflix; the content is more niche. AI can help recommend additional content, but it plays a secondary role compared to content availability (...) AI tools help quickly produce game highlights by analyzing live data streams. The AI selects key moments like goals, cards, and significant plays, creating a summary that's faster and more efficient than traditional editing method.*	*Sky already offers personal recommendations and editorial top picks in the start menu.*	Across the platforms, AI is mainly used to enhance content delivery and production efficiency rather than for deep personalization as seen in entertainment streaming. Public broadcasters like ARD maintain strict editorial control, while other platforms like RTL and Sky focus on using AI to support content accessibility, highlighting, and efficient production to enhance the user experience.	
	ARD introduced tools like a multi-stream player for easy switching, especially during major events like the Olympics, resonating well with users. However, personalization is carefully managed due to public broadcasting standards. AI is used in a limited capacity, such as assisting in faster content editing. ARD is cautious with AI-driven personalization, focusing on editorial oversight and privacy, especially for event-driven sports.	Sky Germany builds on technology/AI through a partnership with for instance WSC Sports, a company specialized in automated highlight clipping. Thousands of clip can be easily created and fastly distributed. Further involvments in the transciption technology which enable speed and creation efficiency are conceivable. In Alexander's view text-to-code applications, that enable the creative realization of concepts, charcterize the biggest long-term advantage of AI a	While AI and recommendation tools help engage users by suggesting additional content, they play a secondary role to content availability in sports streaming. RTL uses AI primarily to streamline content production, such as creating highlights, rather than for extensive personalization as seen in entertainment platforms.	Sky includes personalized recommendations and editorial highlights in its start menu to enhance user experience. Although Sky did not detail its use of AI specifically, it indicated a focus on features that increase ease of access and content discovery.		

Company-Specific strategies & competitive advantage	*We encourage registration to improve our recommendations and user experience, but most users don't register (...) We maintain a strong journalistic standard (...) ARD needs to ensure user data is safe and not commercially exploited.*	*"Our business model primarily relies on subscriptions, with revenue coming from both traditional TV options and streaming through Wow. Advertising and B2B sales, like selling subscriptions to bars and hotels, are secondary revenue streams but still important." Content is where every sports streaming provider will define itself, and it's tied directly to rights costs. This is why smaller players often focus on sports with lower rights fees like handball, basketball, or volleyball, where they can still be profitable while catering to niche audiences."*	*We partnered with Deutsche Telekom (...) This allowed us to share costs and leverage synergies (...) We're working on a chatbot, for example, to help users understand sports like American football, especially for newcomers who find the sport complicated. The bot would provide simple explanations of the game and player positions through a WhatsApp interface. We are also working on augmented reality features that will overlay graphics on live games, showing things like player names and movement paths.*	*To appeal to different target groups with diverse needs, we also offer WOW in the streaming sector, aiming at audiences who want easy access without long commitments (...) The key to Sky Stream's success is offering a wide portfolio of great content in one place (...) we collaborate with a variety of national and international content partners.*	Each platform uses its strengths for a competitive edge: ARD emphasizes accessibility and privacy; RTL combines partnerships with innovative technology to broaden its audience; and Sky offers flexible access options supported by strong content partnerships, focusing on both comprehensive and niche content offerings to cater to diverse audiences.	Technological Innovation and competitive Strategies
	ARD aims to provide unrestricted access to content funded by public license fees. They encourage user engagement without a paywall, reflecting a commitment to accessibility. ARD maintains a unique position as a public broadcaster, prioritizing journalistic standards and privacy over aggressive AI use for personalization.	The primary source of income are the subscriptions. Advertising and B2B represent the secondary revenue stream. The competitive adavantage will be generated through the content that is directly tied to the right costs. Therefore, smaller player often focus on niche markets, where they can strive for profitability.	RTL leverages partnerships, like its collaboration with Deutsche Telekom, to share costs for broadcasting rights, maximizing resource efficiency for major events. To appeal to a broader audience, RTL is developing augmented reality features targeting tech-savvy viewers while balancing traditional content formats for older demographics.	Sky's dual approach with WOW for casual viewers and Sky Stream for comprehensive access appeals to diverse user groups with different content needs. Collaborations with international and national content partners help Sky provide a broad content portfolio in one place, bolstering its market position.		
Future trends/challenges in the sports streaming market	*AI has huge potential, but we're still figuring out how to balance speed and quality (...) Privacy concerns will also play a significant role, especially when gathering data from viewers. At ARD, we can't introduce a registration wall for sports content due to regulations.*	*"I wouldn't be surprised if we see athletes themselves as major players globally in the future, distributing sports content directly. For example, the Wimbledon final might someday be streamed on Roger Federer's platform, or Cristiano Ronaldo might broadcast an exclusive tournament from Saudi Arabia." "Short-form content is critical for reach, especially through platforms like TikTok, which bring large audiences to our brand. However, long-form, in-depth coverage on race or game days remains our core value. TikTok is fantastic for news bursts, but the engagement on major events still depends on traditional formats." "All leagues and broadcasters are striving to bring audiences closer to the action, with the NFL setting a strong example by providing extensive behind-the-scenes access... In Germany, we're still far from that, but I believe we'll see more of it as sports organizations adapt."*	*The main challenge will always be the competition for sports rights. As large players like Amazon, Netflix, and Apple enter the sports market, smaller platforms like RTL Plus will struggle to compete with their enormous budgets (...) The most important factor will always be access to the right content. The growth of AI and personalization features is secondary compared to securing the necessary sports rights. The market will consolidate, and smaller players may find it difficult to compete with global giants. In Germany, public broadcasters may face challenges as well, especially if licensing fees increase or are restructured.*	*With Sky Stream, we're very well positioned (...) We plan to become IP-first in distribution and gradually build a considerable customer base.*	The future of sports streaming will be shaped by fierce competition for sports rights, with global players entering the market. Public broadcasters like ARD focus on privacy and regulatory compliance, while RTL and Sky prioritize securing premium content, adapting to new distribution models, and employing advanced technology to stay competitive. AI and personalization are viewed as supplementary to the core focus of exclusive and accessible sports content.	
	ARD sees AI as having potential but is cautious due to privacy concerns and the need for editorial control. Public broadcasting regulations prevent the use of registration walls, limiting options for personalized features.	Future content can be directly provided by athletes through their own channels or platforms. Moreover, short-term video content will play an curcial role for reaching purpose, but in-depth coverage of matches will remain as the core value. Exclusive content that brings the audience to the pitch will increase and adapt in the future.	The competition for sports rights is expected to intensify as global players like Amazon and Netflix enter the sports market, challenging smaller platforms. Securing key sports rights remains the most crucial factor for success, with AI and personalization viewed as secondary to access to premium content.	Sky anticipates that the trend toward streaming will only increase, and it plans to focus on IP-first distribution to capture this shift. It views advanced TV features like UHD/HDR and Dolby Atmos, alongside its strong network of sports journalists, as essential for maintaining a competitive edge in an evolving market.		
Popular sports and content choices	*The numbers skyrocketed. (...) Some niche sports like 3x3 basketball also saw significant engagement (...). Live viewership still outperforms everything else.*	*"The German sports market is quite unique in its football dominance... Bundesliga, second league, cup competitions, Champions League—there's a market for it all. Even the third league and women's Bundesliga have audiences, with people attending even regional games in stadiums." "Football is Germany's primary focus, which isn't the case in every country. For example, in England, football is big but so are sports like rugby and cricket." "After football, the next biggest sport is motorsport, particularly Formula 1, based on viewership. This is followed by handball, tennis, and golf, which attract substantial interest." "Winter sports like biathlon also command large audiences in Germany, with millions tuning in each weekend, though it doesn't generate the same buzz or media coverage as football."*	*Football is by far the most popular sport, followed by motorsports. American football is also gaining traction... The sports offerings at RTL include the German national football team, the Europa League, and the Europa Conference League. Motorsport is historically important to RTL, and American football is a significant part of our overall strategy, both for linear TV and RTL Plus.*	*Football, Formula 1, and Tennis are the most popular sports streamed on Sky*	Football consistently emerges as the most popular sport across platforms, followed by motorsport and other high-profile sports like tennis. Both international events and domestic competitions with local teams attract strong viewership, while live streaming is preferred over replays, emphasizing the importance of real-time access to popular sports content.	Consumer-oriented content and access models
	Popular events like the Olympics significantly boost streaming numbers. Sports such as Biathlon and Ski Jumping perform well in live streaming compared to other sports. International events attract large viewership spikes, but niche sports tend to have only temporary popularity around these events. Live events consistently outperform replays and summaries.	The german sport market is quite unique with its primary focus on football. Even minor leagues/competition attract an audience. The next big sport is motorsport, especially Formula 1, followed by handball, tennis and golf. In addition winter sport capture large attraction with million tunining in per weekend. Mainly domestic heroes and national events are preffered by the german audience.	Football remains the most popular sport on RTL, followed by motorsports and a growing interest in American football. RTL's content strategy emphasizes high-demand sports like national leagues and significant motorsport events, aligning with viewer preferences for popular sports.	Football, Formula 1, and Tennis are the most streamed sports on Sky, with a strong preference for premium, widely recognized sports. Sky aims to meet user demand by combining content from various providers, offering users a "seamless TV experience" through Sky Stream.		

Table 3 - Analysis grid

Appendix 3: Pre-Survey

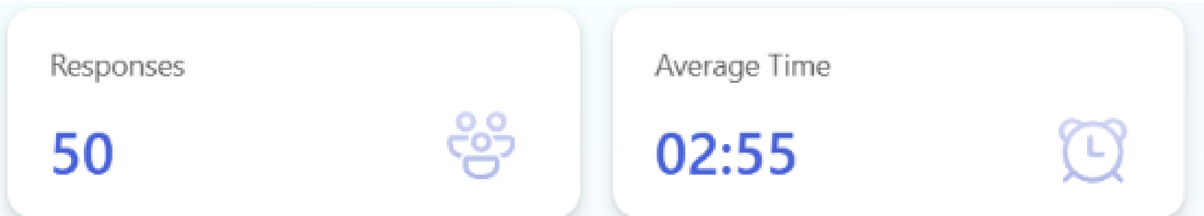

Figure 3 - Responses Overview

	N	%
German	45	90%

Not German	5	10%
Total	50	100%

Table 4 - German/Not German proportion

Are you currently using or have you previously used sports streaming platforms?	**N**	**%**
Yes	35	77,8%
No	10	22,2%
		0,0%
Total	45	100,0%

Table 5 - Have you ever subscribed to a sports streaming service?

	N	**%**
Female	7	20%
Male	28	80%
Other	0	0%
Prefer not to say	0	0%
Total	35	100%

Table 6 - Gender distribution (complete responses)

	N	**%**
Under 18	0	0,0%
18-24	9	25,7%
25-34	24	68,6%
35-44	1	2,9%
45-54	0	0,0%
55+	1	2,9%
Total	35	100,0%

Table 7 - Age distribution

	N	**%**
DAZN	30	85,7%
Sky / WOW	22	62,9%
Amazon Prime Video	13	37,1%
RTL+	5	14,3%
NFL Network	1	2,9%
Fubo	1	2,9%
Disney+	1	2,9%

Magenta TV	2	5,7%
Total	35	100,0%

Table 8 - Frequency of sports streaming provider's mention

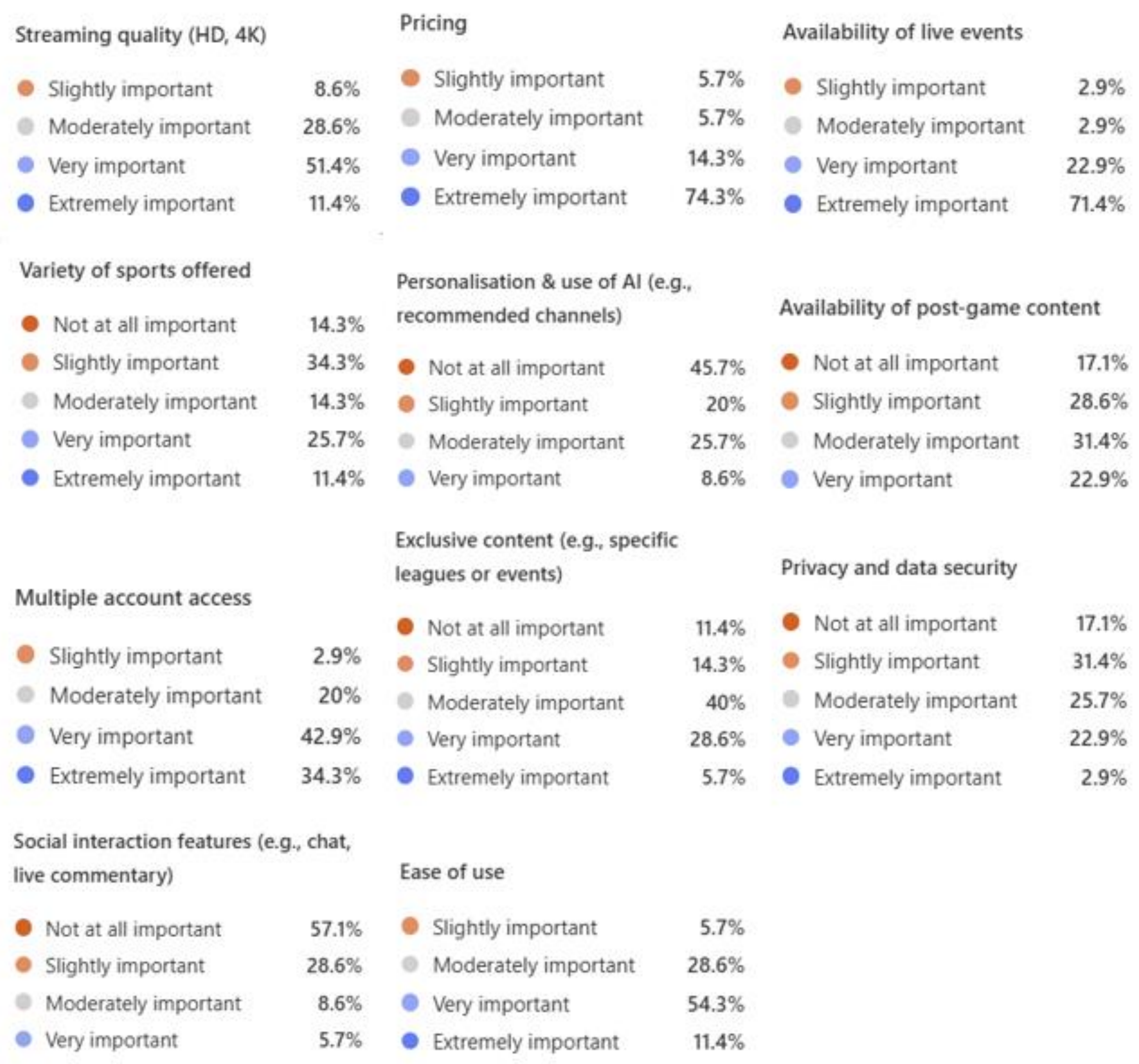

Figure 4 - Preference distribution per feature

Appendix 4: Repositioning Strategy of Amazon Prime Video

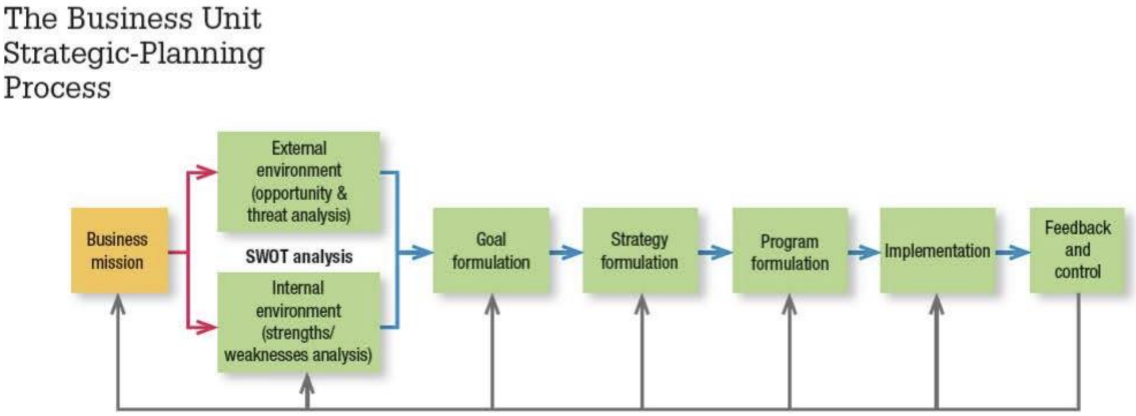

Figure 6 - Business Unit Strategic: Planning Process (Kotler & Keller, 2016)

Figure 7 - SWOT-Analysis of Amazon Prime Video

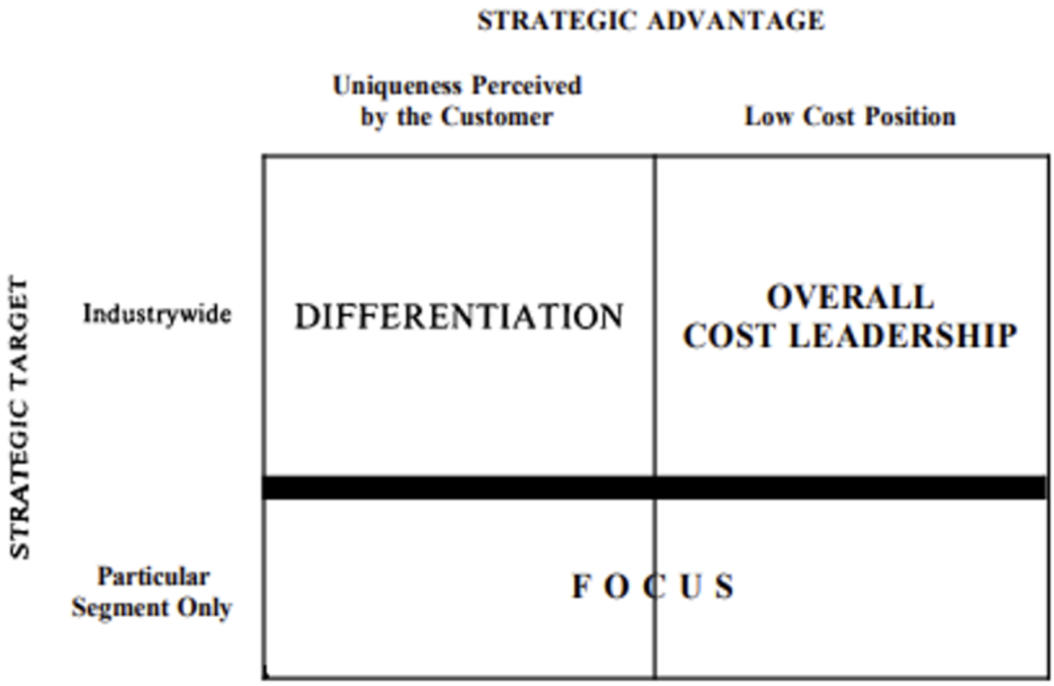

Figure 8 - Porter´s Generic Forces (Porter, 1980)

Figure 9 - Website Interface, generated by AI