The year in sport: six key trends for 2026

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2026 in Sports

Executive summary

We're heading into 2026 on the back of a lacklustre macro environment, with linear broadcasters and streamers facing structural changes in the TV market which has implications across media rights and sponsorship. Ampere has identified some key trends for the year ahead which will have significant impacts on the industry.

For free-to-air, commercial and pay TV broadcasters, sport is a key defensive asset for both subscriber retention and advertising revenue. However, as subscriber growth for streamers plateaus, generalist platforms* have increasingly been turning to sport as a way of driving consumer growth, through subscription and ad-tiers, in mature markets. However, this benefit has not been felt consistently by all rightsholders, and has been concentrated, mostly in the US. Those macro factors, and a lack of generalist streamer investment in Europe, is impacting distribution strategies. The absence of competition in France, for example, has led to Ligue 1 having to go direct-to-consumer domestically, thereby dramatically decreasing its broadcast revenue.

In the US, however, football (or soccer) is going from strength to strength, and the 2026 FIFA Men's World Cup is hoping to capitalise on this from both a media rights and sponsorship perspective. The former has seen its values increase by 94%, while Ampere forecasts that the latter will bring in $2.2bn for FIFA, a growth of 23% from the previous tournament. In Brazil, this year's tournament will once again return to CazéTV, an influencer-led channel which is now challenging traditional broadcast for rights in the market and is expanding into Portugal in 2026. Distribution of live rights via influencers, as a means of reaching new audiences and providing alternate viewing experiences, grew in popularity last year with notable deals for the Bundesliga and Saudi Pro League. This is a trend that, if anything, will accelerate over the coming years.

Influencers are also emerging as a rising force for new events. Influencer distribution deals have been the backbone of emerging competitions such as the Kings League, Queens League and Baller League, all of whom are looking to challenge the status quo. Sponsorship revenue is key to these new leagues, representing 90% of Baller League's revenue and 70% of Kings League's. The innovation of the challenger leagues and unique activation opportunities have already attracted brands such as Philips, Red Bull and O2. As the participating teams begin to sign deals independent of the leagues themselves, this will bring them into competition with more traditional rightsholders for sponsorship revenue.

Sponsorship will be a hot topic in the English Premier League (EPL) this year with the gambling ban for Front of Shirt (FoS) deals beginning in the 2026/27 season. In the short term, club revenues will be impacted due to the large deal values associated with the asset (FoS), but in the medium to long term, gambling brands will be looking to redistribute that spend, albeit at lower levels than their current output. Assets with higher exposure, such as sleeve sponsorships, will be the main beneficiaries, with Ampere expecting a significant growth in the average deal value in the coming years.

*i.e. Netflix, Amazon Prime Video, Disney+, Paramount+ and Apple TV

Generalist streamers are turbo-charging their sport strategies

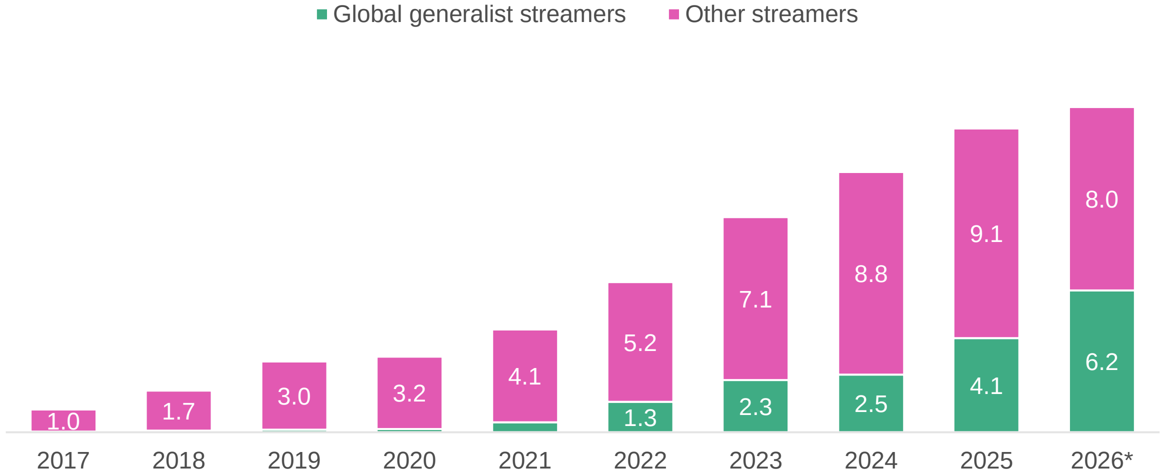
Streaming investment in sports is growing rapidly

$14.2bn

in global investment in sports rights is projected for 2026

Global investment in sports rights by streamers continued to grow in 2025, from $11.3bn in 2024 up to $13.2bn, boosted by DAZN's $1bn FIFA Club World Cup deal, and is projected to reach $14.2bn in 2026. If we exclude the Club World Cup from the 2025 total, the 2026 projections represent a 16% year-on-year increase - in a year when the two largest global events - the FIFA Men's World Cup and Winter Olympics - will primarily be broadcast on linear TV in most markets (although it is likely that these quadrennial events will also be shown on rightsholders' streaming platforms). It is clear, therefore, that growth in sports rights investment from pure-play streamers is predominantly organic, centred around ongoing, annual events outside of major, global tournaments.

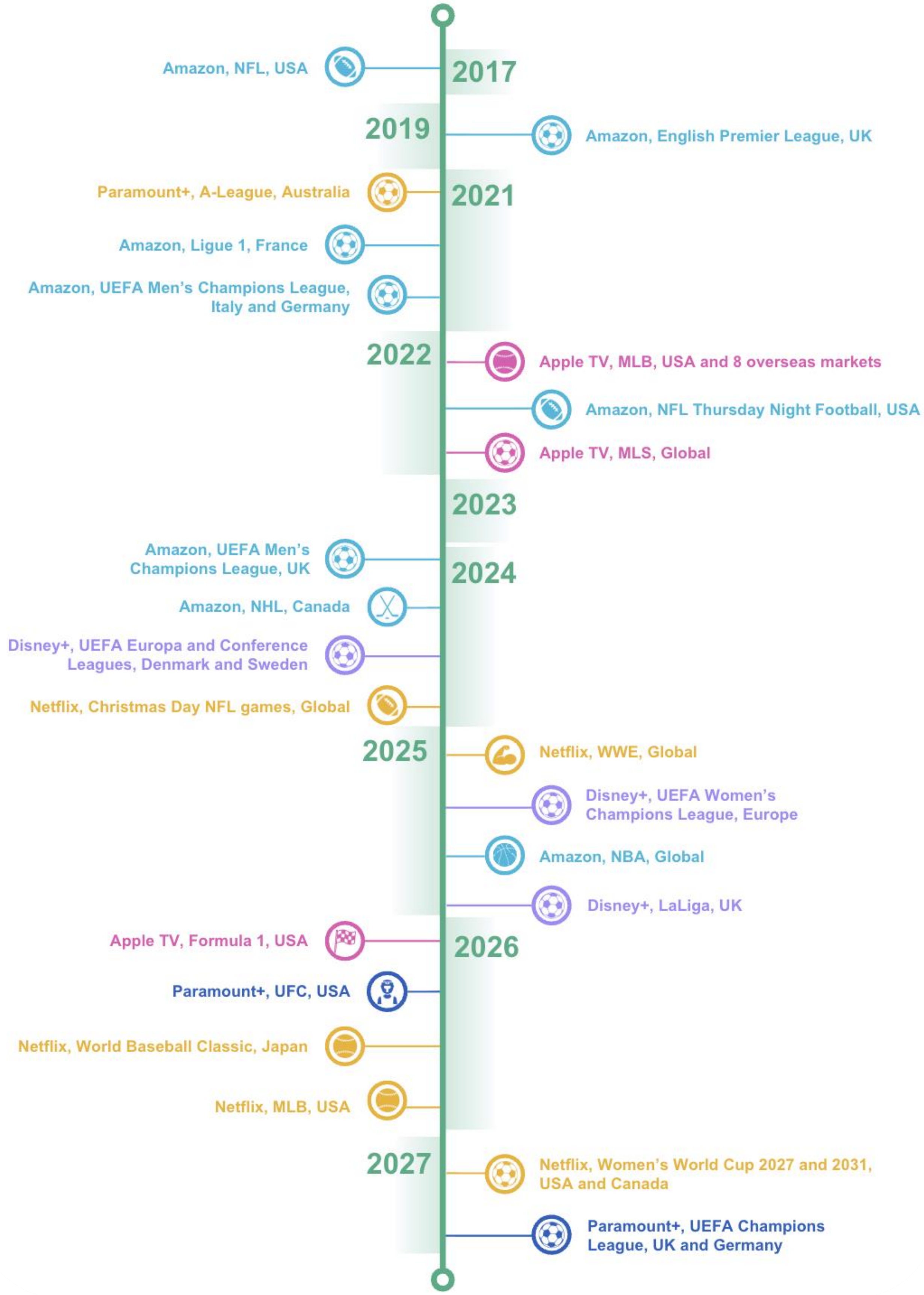
Total global investment in sports rights by streaming services ($bn)



Source: Ampere – Sports Media Rights
*2026 values include only deals agreed to date

To look at which companies are driving this growth, it is first helpful to divide the streaming market into two categories: *Global generalist streamers* and *Local streamers*. Global generalist streamers are defined in this report as streaming services that do not specialise in sports only and are available across the majority of the largest global markets, specifically here comprising Netflix, Amazon Prime Video, Disney+, Paramount+ and Apple TV. These services have been slow in their adoption of live sports rights compared to investment in other forms of content. This can be seen in their relative spending power across different forms of content; even by 2024, these generalist streamers accounted for 22.5% of all global original film and TV content, but just 4% of all sport spend.

Timeline of major sports rights deals by streamers



Source: Ampere Sports – Media Rights

44%

of global streaming spend on sports rights will come from generalist streamers in 2026, up from **31%** in 2025

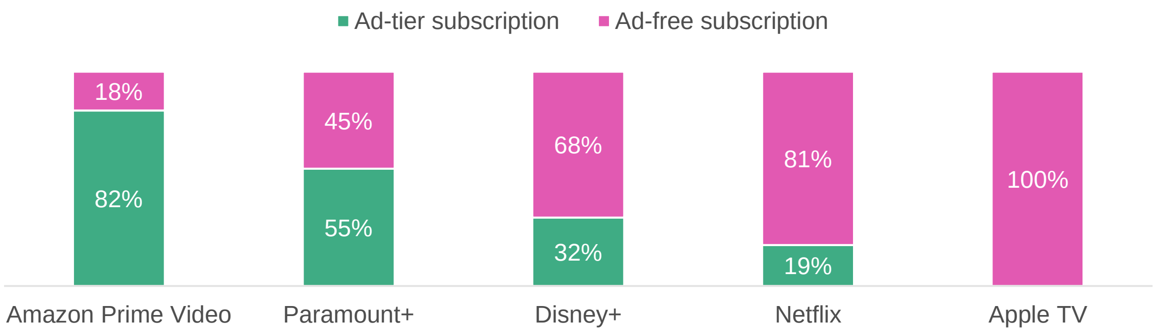
But this is growing rapidly, with generalist streamers increasingly accounting for a greater proportion of sport spend, as more services continue to prioritise sporting events. Based on deals agreed so far for 2026, Amazon will be the top streaming spender with a 27% share, investing $3.8bn in total, over half a billion more than last year's top investor DAZN. Paramount+ also moves into the top five highest spending streamers thanks to its new $1.1bn-a-year UFC deal. Overall, global generalist streamers will account for 44% of streaming spend on sports rights in 2026, up from 31% in 2025.

Why are generalist streamers buying into sports now?

Since peaking in 2020, global subscription OTT net additions have been slowing, driving many services to search for new ways to accelerate growth. One of the biggest changes to strategy has been that the largest generalist streamers have introduced ad-tiers. Netflix, for example, launched its ad-tier in Q4 2022, with many following suit within a year, and these ad-tiers serve to lower the price of entry for new customers, helping them to continue to add subscribers.

In the past two years, a meaningful portion of the customer bases of these streamers have transitioned to an advertising model – with 55% of Paramount+ and 82% of Amazon Prime Video subscribers now on advertising tiers. This has in turn created new strategic imperatives for these players – while previously the focus for revenue growth centred around the two main pillars of *subscriber acquisition* and *subscriber retention,* there is now a third imperative: *maximizing advertising revenue,* through ad-tier reach, increasing ad loads and by driving CPM growth. Live sports have become increasingly valuable to streamers because they impact all three of these strategic goals.

Q4 2025, proportion of global customers (RGUs) on ad-tier vs ad-free subscriptions, by company



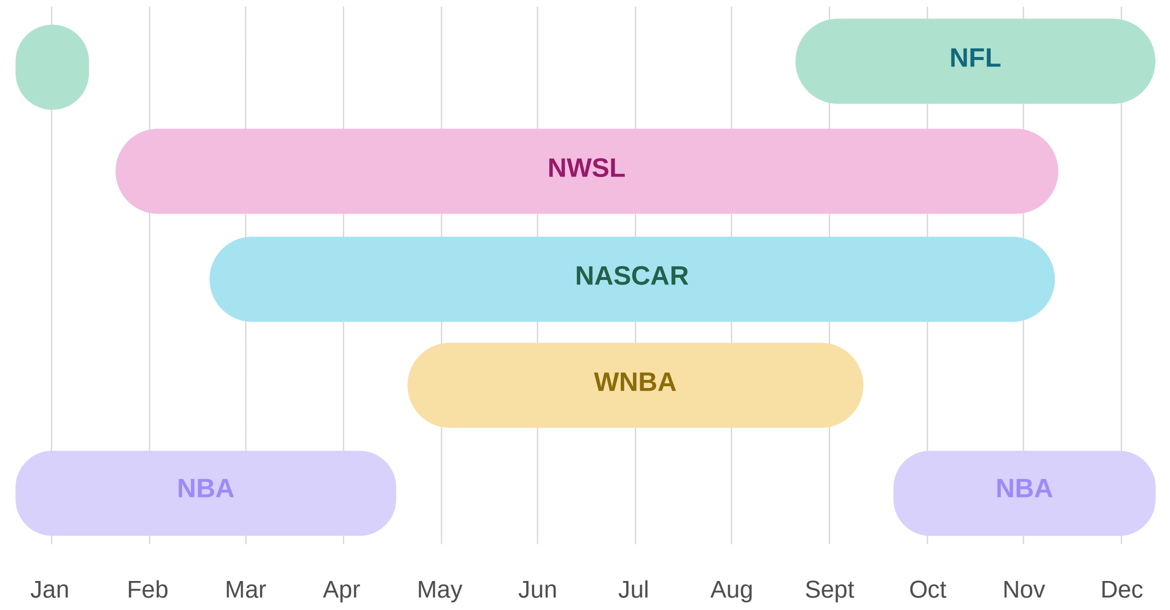
Source: Ampere Markets – Operators

First, live sporting events are, arguably, the last remaining appointment-to-view content that can guarantee large concurrent audiences, generating large numbers of ad-impressions, which, alongside associating with a recognisable brand in the form of a major sports league, creates an attractive proposition for brands buying advertising space, offering a chance to drive up CPMs.

Moreover, the audience is unique. Over a quarter of global consumers say they watch live sport regularly, and, according to Ampere's *Sports - Consumer* survey, 34% of sports fans say they only really care about watching sport and don't watch many TV series or films. Acquiring rights to live sport, therefore, taps into a new consumer segment, which is not only valuable for advertisers, but is also valuable as a mechanism for acquiring those subscribers who have not yet been persuaded to sign up to a global streaming service based on the film or entertainment offerings.

Finally, many sports rights also assist with subscriber retention, providing fans with a regular flow of content across a season. While single events can help with subscriber acquisition, if there is limited other sport content to keep fans engaged, they will churn. This was evident for Paramount+ after the 2024 Super Bowl in the US. The game drove roughly 2.3m subscribers for the platform, but 51% had churned within the first two months, and after eight months, three quarters of those new subscribers had left the service. Even by taking small rights packages with just one match per week, streamers can build a portfolio of sports that keeps customers returning to their platform all year round - with the example of Amazon shown in the below chart. These global generalist streamers have also shown an increase in sports-related commissions outside of live events in recent years, adding this ancillary content to supplement their live sports rights to better assist with retaining sports fans as subscribers.

Season lengths of sports rights held by Amazon Prime Video in the USA



Source: Ampere Sports – Media Rights

What's next for the generalist streamers?

Most of the early sport streaming deals, from 2017 to 2024, struck a similar tone, with smaller, co-exclusive rights packages that supplemented the streamers' existing content and drove sign-ups. For example, Amazon's current rights deal for the NFL Thursday Night Football, which started in 2022, is worth $1.1bn per year, but represents only 9% of the total deal value; while Amazon's Premier League rights deal in the UK, struck in mid-2018, gave it matches centred around Christmas, a key time of the year for retail. Deals such as these have largely been additive for both sides: rightsholders look to grow revenues and widen audiences, while still relying on broadcast TV for the bulk of distribution; and streamers dip their toes in the water, using the portion of rights to drive subscriptions.

However, more recently we have seen strategies from streamers begin to change, with each player using different approaches to curate the most strategic portfolio:

- **Global/regional deals:** Where Amazon had started out with mostly localised deals, it has moved toward global options, specifically in its 11-year NBA rights deal and the expansion of its NFL Black Friday game rights in 2025 from US-only to global. This allowed it to show 12 hours of live sport worldwide on Black Friday in 2025, bringing a wider range of sports fans into its ecosystem on the biggest shopping day of the year for its e-commerce platform.

- **Single-market deals:** Apple TV, on the other hand, has relaxed the emphasis on global rights seen in its MLS rights deal and agreed single-market rights for Formula 1 in the USA, instead placing a focus on a sport with growing local fandom and a synergy with existing non-live sports content, namely the *F1* movie.

- **Premium event deals:** Netflix has also shown more interest in local rights, as part of its focus on premium, one-off events. In addition to its global deals for the NFL Christmas Day games or the recent boxing match between Anthony Joshua and Jake Paul, it has also picked up rights to major tournaments in specific markets where fandom is particularly high, for example the 2026 World Baseball Classic in Japan or the upcoming FIFA Women's World Cup in North America, capitalising on the growth in popularity of women's sports.

- **Competition exclusivity:** Exclusivity has played a key part in Apple's rights strategy, with its intention to be the sole rightsholder of the leagues it covers, rather than taking co-exclusive packages and contributing to fragmentation within a specific sport.

How will rightsholders adapt?

As streamers become an increasingly more significant part of the sports media rights market, rightsholder strategy is evolving too. Perhaps the best example of this is UEFA, which created a new global package in its tender last year for the next cycle of the Men's Champions League rights from 2027-2031, designed with global streamers in mind.

The package consisted of one 'first pick' game each matchweek together with a marquee opening day fixture involving the winners from the previous season, which would be appealing to streamers in particular for multiple reasons. The opening day fixture creates exclusivity – an opportunity to drive sign-ups at the beginning of the season, when consumers are excited about the event starting. Meanwhile, the season long 'first pick' creates a recurring appointment-to-view slot, that benefits both subscriber retention throughout the season, and maximises the opportunity for large concurrent audiences to generate advertising revenue.

€2.4bn

UEFA's club competition rights value across five key markets, following a **20%** increase

However, while UEFA reportedly received interest in the global package from Netflix, Apple TV and DAZN, it was able to more successfully sell rights in the 'big five' European markets individually, increasing values significantly in all markets other than France. In its first tender since appointing Relevent, the agency that assisted in more than doubling the value of its club competitions rights in the US, as its global marketing and sales partner, UEFA has increased the value of the rights across all three of its club competitions in these five markets alone by 20% to €2.4bn per season.

And while ultimately the global package wasn't sold, its introduction most likely contributed to this increase in value, as local players were driven to increase their bids in order to compete with the additional threat of losing some games to a global buyer. UEFA has also been able to attract a new generalist streamer to the bidding process in the form of Paramount+, which has contributed to increasing the values in the UK and Germany, where it was successful in obtaining rights to the Champions League, displacing incumbent broadcasters TNT Sports and DAZN, respectively.

It is likely that we'll see more leagues carve out global packages for small numbers of games or even adjust their schedules to create standalone events to attract the global streamers. There have already been some similar directional steps within North American leagues – for example, the introduction of the NBA Cup created standalone events within the NBA regular season, while Amazon has acquired rights for specific nights of the week for the NFL in the US and the NHL in Canada, building brands around events like *Thursday Night Football*.

As the 'big five' national European football leagues have seen growth in their domestic media rights values slow down, or even decrease in recent rights cycles, creating new global rights packages could provide a new avenue for revenue generation. Some leagues are already exploring the option of introducing international matches, which provide a perfect opportunity for a standalone 'marquee fixture' with global appeal that could be carved out into a separate rights package similar to what the NFL or NBA have previously done with their international games. There are limitations, however, with what fans and players are willing to embrace: The cancellation of the international LaLiga match is testament to what can happen if all parties have not bought into the idea.

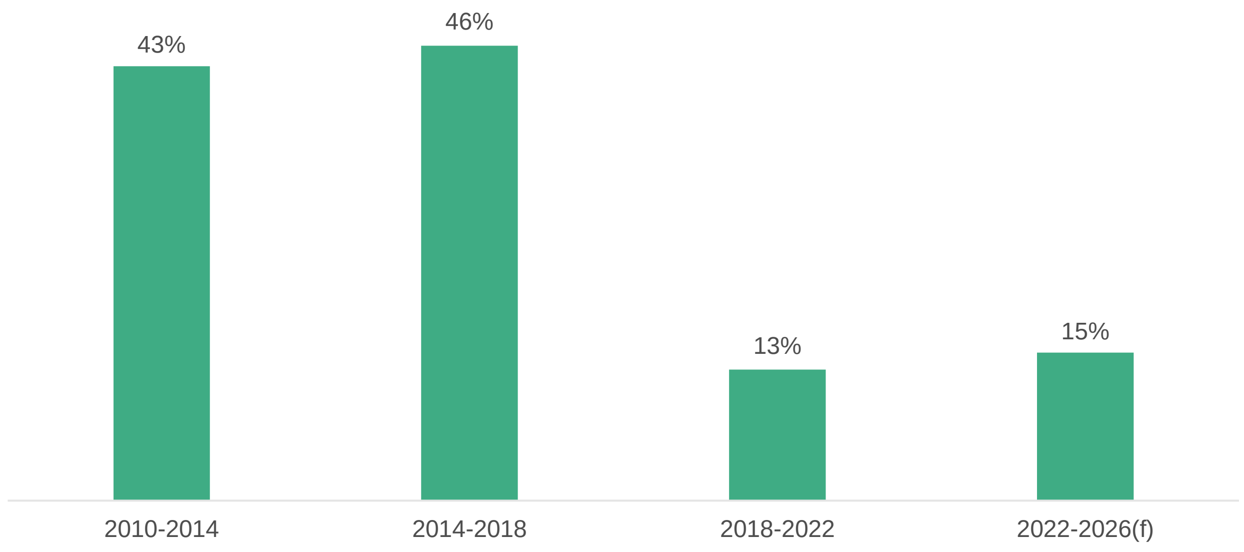
Distribution models are changing, as direct-to-consumer (DTC) matures

For rightsholders, DTC is likely to remain primarily additive

Sports rights revenue growth has **slowed**, particularly in **Europe**

While streaming revenue continues to grow (as outlined in the first section of this report), overall sports rights revenue growth has slowed down, particularly within Europe. Rights spend grew by 46% between 2014 and 2018, before slowing to 13% in the next four-year period, where it is expected to remain from 2022 to 2026 (15%). This slowdown in revenue growth has, among other things, led to more sports leagues developing direct-to-consumer (DTC) solutions. For many rightsholders, these DTC platforms are primarily complementary services to generate additive revenue - directly monetising high-value super-fans by providing them with additional live or ancillary content - while also serving as leverage in rights sales negotiations as an option for withholding rights.

Growth in sports rights spend in Europe across four-year cycles (%)



Source: Ampere Sports – Media Rights

2025, however, saw the first high-profile case of a major sports league going predominantly DTC in its domestic market, as France’s Ligue 1 launched Ligue 1+ following the early termination of its contract with broadcast partner DAZN (while BeIN Sports retained its smaller rights package until the end of the 2025-26 season). Ligue 1+ has seen healthy early uptake, reportedly surpassing 1m subs in its first month after launch, and the LFP (Professional Football League) is set to distribute €142m of the DTC revenue to clubs in 2025-26.

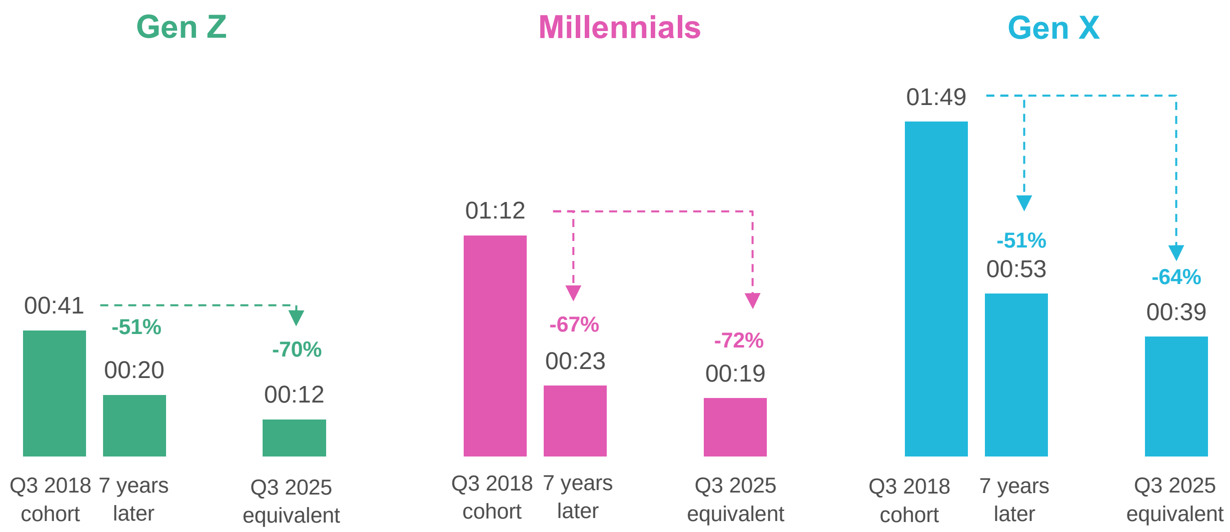
However, to put that into perspective, the LFP distributed €427m of broadcast revenue to clubs in 2023-24 – highlighting the challenges that DTC services face when looking to replace broadcast deals. Even in a scenario of relatively strong uptake, such as for Ligue 1+, it takes time to build an audience equivalent to the value of broadcast deals, and both the league and its teams either have to be willing to subsidise early losses of revenue in the hope of eventually reaching the same scale, or find a financing partner, which risks limiting the league's longer-term returns. So, while Ligue 1+ has shown strong early growth, it is unlikely that these figures will motivate other major sports leagues to turn away from their main broadcast partners in upcoming rights negotiations.

In the US, 2025 saw major broadcasters commit to a DTC transition

Sports leagues have not been the only industry stakeholders developing their DTC strategies. 2025 saw several major broadcasters either launch or begin the process of launching their own streaming platforms. In the US, ESPN and Fox launched the ESPN and Fox One streaming platforms, respectively in August 2025, in time for the NFL season, offering all the live sport each company has rights to. These moves signal a shift towards major US sports media players seeking a more direct relationship with fans, away from the traditional carriage fee monetisation strategy.

The decision to launch these DTC services sits at the nexus of several external trends. Firstly, generational shifts in viewing habits are taking place. Ampere's Consumer survey data between Q3 2018 and Q3 2025 shows that, while consumers are watching less linear TV as they age, generational behaviour shifts are more substantial. For example, those who were 18-21-year-olds in 2018 - now 25-28 years old - are watching 51% less linear TV than seven years ago; while present day 18-21-year-olds watch 70% less linear TV. Indeed, 45% of sports fans would prefer to watch live sport via streaming platforms than traditional, linear TV platforms. These DTC streaming offerings can therefore be considered future-proofing strategies among traditional sports broadcasters as consumption habits continue to shift.

USA: Self-reported linear TV viewing, hrs/day per internet user



Source: Ampere Media – Consumer, Q3 2018, Q3 2025

Meanwhile, in the US particularly, the total number of pay TV subscribers continues to fall, which in turn reduces the overall revenue that these broadcasters are making via carriage/affiliate fees. These fees had previously formed the bulk of revenue generation for sports broadcasters, and their decline creates a tension between promoting their own DTC services and maintaining relationships with linear TV providers, to avoid negatively impacting carriage revenues. This has been highlighted in recent carriage disputes, most notably ESPN's temporary blackout on YouTube TV in November 2025. At this stage there is no desire from broadcasters to abandon broadcast entirely (with many of the same arguments seen in the case of Ligue 1+ also applying) – but, as both rights buyers and distributors get more data to understand the impact that the new DTC services will have on existing pay TV subscriptions, it is highly likely we will see more carriage disputes throughout 2026.

Finally, as streaming subscriber growth has slowed, and reducing subscriber churn becomes ever more important, the desire for powerful streaming bundles has become increasingly critical to many of these rights buyers. This can be in-house – as the ESPN DTC service, for example, can be bundled together with other Disney-owned services such as Disney+ and Hulu to create a compelling package – but they can be also external, as major sports rights buyers can now potentially bundle their streaming services together. While ESPN and Fox already have a bundle partnership together, a theoretical sports bundle between DTC services from ESPN, Fox One and Warner Bros. Discovery would (in addition to essentially recreating the proposed Venu bundle from 2024) create an attractive sports streaming bundle for fans – that could be particularly effective for targeting cord-cutters, bringing them together under a single subscription at a time when content is increasingly fragmented.

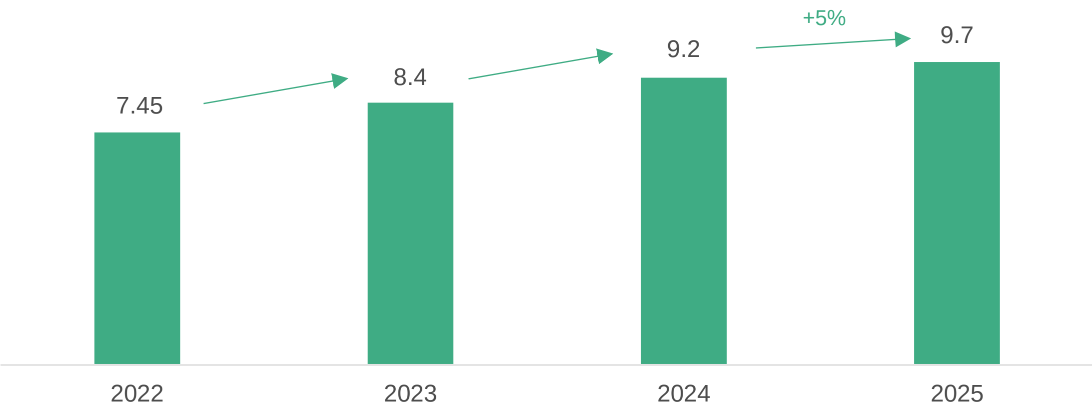
European sponsorship revenue grows, while media rights fees stall

With sports media rights revenue growth slowing in 2025, sponsorship has become an increasingly integral revenue stream for sports clubs, leagues and governing bodies. European sponsorship revenues have risen year-on-year since 2022 and now total $9.7bn across the European rightsholders tracked by Ampere.

$9.7bn

in European sponsorship revenues, up year-on-year since 2022

Total sponsorship spend across European sports, $bn



Source: Ampere - Sponsorship

While unique commercial strategies and circumstances explain sponsorship revenue growth across different sports, several common themes have emerged:

- Many rightsholders successfully sold premium assets for increasingly large sums in 2025; average fees paid by sponsors for title partnerships, front-of-shirt, sleeve and kit supplier deals all increased.
- Some rightsholders restructured partner tiers to accommodate more sponsors, by defining tighter exclusive categories. For example, Arsenal FC signed four drink partners and four fintech partners in 2025 alone.
- Globalisation remains a shared KPI. As events, tours and fixtures are scheduled in new markets and corporate operations expand through offices and facilities, the number of regional sponsorship deals continues to rise across multiple sports.
- Rightsholders are diversifying the assets that they make available to partners. Ampere data shows a year-on-year increase in the number of women's team deals across the 'big five' European leagues, for example, as well as a jump in the number of training asset deals since the 2022/23 season.

There are caveats to these themes. For example, EuroLeague has slimmed down its sponsorship portfolio, opting out of a title partnership with Turkish Airlines and exiting regional-level deals at renewal stages. This approach prioritises partnerships with Etihad Airways and DCT Abu Dhabi over a singular title partner, and seeking to make the EuroLeague IP more attractive for current and future global-level partners.

Which brand categories injected new spend into the European market in 2025?

Europe’s new sponsorship spend, 2025 – brand category shortlist *

2025	2024	Category	Total spend on new deals in 2025 (€) **
1	2	Sports apparel	179m
2	19	Luxury goods & clothing	126m
3	12	Software / SaaS	90m
4	21	Communications & TV	75m
5	3	Cryptocurrency	64m
6	1	Betting	52m
7	17	Banking	47m
8	76	Soft drinks	31m
9	6	IT	30m
10	26	E-commerce	29m
11	27	Tourism	28m
12	47	Hotels & accommodation	24m
13	37	Automotive manufacturers	21m
14	31	Trading	19m
15	11	Beer	18m
16	23	Consumer devices	13m
17	22	FinTech	13m
18	77	Confectionery	10m
19	9	Oil	10m
20	65	Household appliances	10m

Source: Ampere – Sponsorship
** Only categories with 5 or more sponsorship deals were shortlisted*
*** Not including renewed or expanded deals*

Both emerging and traditional sponsor categories increased European sponsorship spend in 2025. Ampere analysed over 170 categories and shortlisted the top 20 highest spenders, focusing on new deals rather than extensions to highlight where the strongest growth opportunities sit for rightsholders. Five trends stand out from the shortlist:

1) Luxury fashion brands drive new sponsorship spend in 2025

LVMH drew significant attention through unprecedented access and brand visibility at the Paris 2024 Olympic Games, followed by landmark deals with Formula 1 and Real Madrid for 2025. While the Formula 1 deal drove a large proportion of the $126m spent by luxury brands, fashion houses including Hugo Boss, TUDOR, Giorgio Armani, Burberry and C.P. Company also signed new athlete and team deals. As athletes increasingly build personal brands through fashion and social platforms, Ampere expects luxury fashion-related deal volumes to at least hold steady in 2026.

2) The betting and cryptocurrency bubble deflates

European sponsorship spend by betting and cryptocurrency businesses dipped in 2025. Betting companies spent a combined $245m in 2024 and $52m in 2025, although this decrease reflects exceptionally high spend across the Premier League specifically in 2024, rather than weak investment in 2025. Boylesports, Bally and Betway all signed new football deals for 2025/26, as betting brands compete for customer acquisition. Cryptocurrency exchanges, by contrast, have exercised greater caution since a spending spree around 2021/2022, prioritising top-tier global properties such as Formula 1 (Crypto.com) and the DP World Tour (Nexo) to maximise reach and credibility.

3) B2B tech and FinTech offer bountiful opportunity

Technology and FinTech businesses represent one of the fastest-growing sponsorship opportunities in 2026. The breadth of the sector allows rightsholders to stack multiple partners, spanning services such as cloud infrastructure, data, e-commerce, trading platforms and digital banking. AI is among the fastest-growing technology categories by deal volume, with companies such as Groq and Meta AI trialling lower-value Formula 1 team partnerships, that could scale in 2026 as more AI-focused businesses emerge.

4) ‘Secondary’ travel categories outspend airlines on new deals

Airlines have historically dominated new travel-related sponsorship spend, but 2025 proved an exception. While smaller carriers such as SunExpress and Condor signed deals, tourism boards and accommodation companies invested more heavily overall. Individual organisations had an outsized impact: The Democratic Republic of Congo tourism arm signed with AC Milan and Airbnb sponsored FIFA and LaLiga, in high value deals. Audi F1 has set an early precedent as the only Formula 1 team partnered with a tourism body for 2026 – Visit Qatar - although this is unlikely to remain the case for long.

5) Traditional categories found novel sponsorship angles

Automotive, drinks and telecommunications brands remain long-standing sponsorship investors, but emerging sports formats and product innovation are reshaping partnership strategies. EV manufacturer BYD signed with Inter Milan to accelerate European expansion, while Jeep entered a joint front-of-shirt deal with Juventus and US-based neighbours Visit Detroit. Telecommunications brands are also experimenting with newer formats: O2 and Vodafone sponsor leagues such as Baller League and the Kings League, with O2 also committing to spend parity between England men's and women's rugby teams. In contrast, Coca-Cola returned to tradition, sponsoring the Premier League once again while also securing multiple club-level deals.

Where should rightsholders look to fill sponsorship white space in 2026?

The shortlist demonstrates the flux in top spending categories on a year-to-year basis, so predictions are challenging. However, based on 2025 category analysis, Ampere's emerging European sectors for 2026 are: **Fintech, SaaS, AI, real estate, household goods, e-commerce, comparison sites, trading, forex and digital banking**. Ampere data also shows a growing opportunity for rightsholders, particularly teams, to monetise women's team and training assets, with strong growth apparent across the European football landscape. In particular, sponsorship spend in women's sport is likely to accelerate in 2026.

- Fintech
- SaaS
- AI
- Real estate
- Household goods
- E-commerce
- Comparison sites
- Trading
- Forex
- Digital

Changing audience demand is fuelling media rights disruption

Influencers are meeting consumer demand for more personalised content

$60m

CazéTV invested in sports rights in 2025

The evolution in audience consumption habits is impacting the sports media industry beyond fuelling the growth of DTC services. In particular, 2025 saw a notable rise in influencer-led streaming rights deals. An early adopter of this strategy from the influencer side was Casimiro, a Brazilian streamer who launched *CazéTV* with sports media agency LiveMode in 2022. Since then, *CazéTV* has capitalised on beneficial market dynamics in Brazil to provide free, digital-first coverage of several leading sports competitions in the country, via YouTube and Twitch. The platform has since become a leading sports buyer in Brazil, investing over $60m in rights in 2025 and streaming live fixtures to its healthy customer base – for example, the FIFA Club World Cup Round of 16 match between Flamengo and Bayern Munich last summer had 27m viewers on YouTube. In 2026, *CazéTV* will launch in Portugal and show national matches for free.

Table of selected influencer sports rights deals in Europe agreed in 2025

Channel	Competition	Country	Details
That's Football	Bundesliga	UK	Friday night matches
The Overlap	Bundesliga	UK	Friday night matches
Eggchasers	Pro D2 Rugby	UK	35 matches per season
Zack Nani	Saudi Pro League	France	Up to three matches per week
Zack Nani	France U21 Internationals	France	Exclusive online rights to at least 14 matches across two years

Source: Ampere Sports – Media Rights

Beyond Brazil, 2025 saw several sports leagues of different scales agree rights deals with influencers. Perhaps most notably, the German Bundesliga partnered with two YouTube channels in the UK, *The Overlap* and *That's Football* (run by streamer Mark Goldbridge), to broadcast matches in the 2025-26 season as part of the league's multi-platform distribution strategy which also includes Sky, Amazon and the BBC. *That's Football* has benefitted from leveraging its own production and commentary for the matches, averaging 63,000 views per Bundesliga match on YouTube. On the other hand, *The Overlap*, taking the world feed, has an average of 30,000 views per match, suggesting that simply showing the world feed is not especially appealing to fans, and instead fans are looking for additive content. Other examples include French streamer Zack Nani acquiring Saudi Pro League and France Under 21 international football matches, while UK YouTube channel *Eggchasers* has partnered with French league Pro D2 Rugby.

58%
of sports fans globally watch influencer or athlete videos on social platforms

While these influencer deals have not yet generated substantial rights fees outside of Brazil, they are an opportunity for sports leagues to engage audiences on the platforms they are using most often. Ampere's Sports Consumer survey data highlights that 58% of sports fans globally watch videos by influencers or athletes via social video platforms like YouTube, Instagram and TikTok at least weekly. This figure increases to 72% when looking at sports fans aged 18-34. Indeed, 65% of sports fans report that they watch influencers or personalities doing watch-alongs or discussing sports events.

These shifting consumption habits have also driven a growing strategic emphasis on non-live sports content—particularly podcasts—among major media platforms. *The Rest is Football*, produced by Gary Lineker's Goalhanger, has secured partnerships with both DAZN and Netflix in the past year as each looks to capture greater fan attention outside live match windows. By acquiring sports-adjacent, personality-led content, platforms can extend time spent on their services, reach younger audiences accustomed to long-form video podcasts on YouTube, and benefit from regular, low-cost, high-frequency programming that complements premium live rights without competing with them.

With influencers already playing a key role in the engagement of sports fans – and particularly younger audiences – through sports content, we expect to see more of these live rights deals being struck in 2026. For leagues looking to maximise viewership and attract a new generation of fans, partnering with content creators will be an important step in securing the long-term fan base of the competition.

What media strategies are new challenger leagues employing?

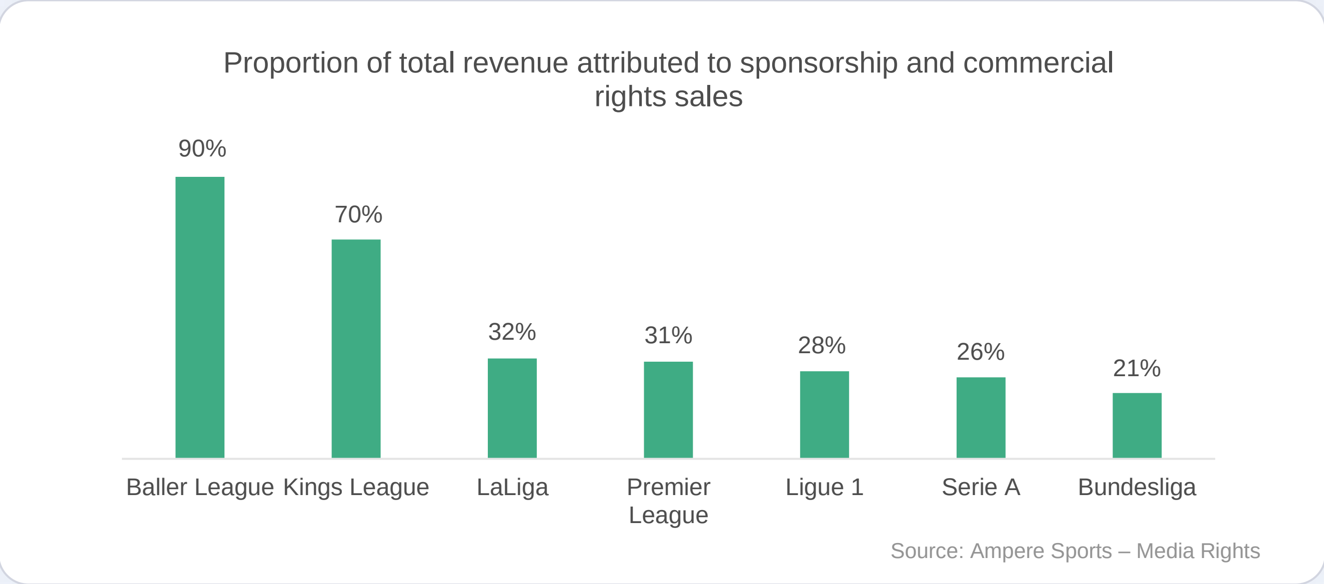
As well as new distribution models, we have also seen the launch of new challenger leagues across several sports in the last couple of years, designed to appeal to changing consumption habits. These have often been created as shorter-format versions of existing professional competitions, prioritising fan engagement and faster-paced entertainment: The Kings League and Baller League have launched as seven- and six-a-side football leagues, respectively, Unrivaled is a 3x3 women's basketball league, and TGL golf is played indoors using a simulator.

As with the more established professional leagues, these competitions have also sought to leverage influencers across the events as players and managers, or as part of the commentary and production teams, to generate engagement from younger sports fans. They have also opted for a variety of broadcast strategies to drive both revenue growth and audiences in their nascency. The Kings League and Baller League have opted to show matches via social platforms such as YouTube, TikTok, X and Twitch, while Baller League has also struck a deal with Sky, the leading sports broadcaster in the UK. TGL has partnered with traditional platforms ESPN in the US and Sky in the UK, while Unrivaled is broadcast on Warner Bros. Discovery platforms.

Offering matches for free may have helped raise the profile of the Kings League and Baller League relative to other challenger competitions, as Ampere's Sports Consumer survey data shows that 52% of sport fans have heard of the former, and 44% are aware of the latter. As disruptors continue to find ways to tap into younger sports fans, more new challenger leagues are likely to be announced in 2026 and a multi-channel distribution strategy is likely to be key to maximising viewership in the early growth stages. This may well include more cases of influencer-led partnerships.

Sponsorship revenue is essential to challenger league audience growth

Challenger leagues may choose to sacrifice media rights income to grow audience reach via social platforms, especially during early development stages. Leagues need time and capital to expand incrementally market by market, understand demand for the product, and to fine-tune the format. Therefore, early and sustained sponsorship income is vital to fuelling growth and longevity. This is illustrated by the significant contribution of sponsorship income to total revenues, compared to the 'big five' European football leagues:



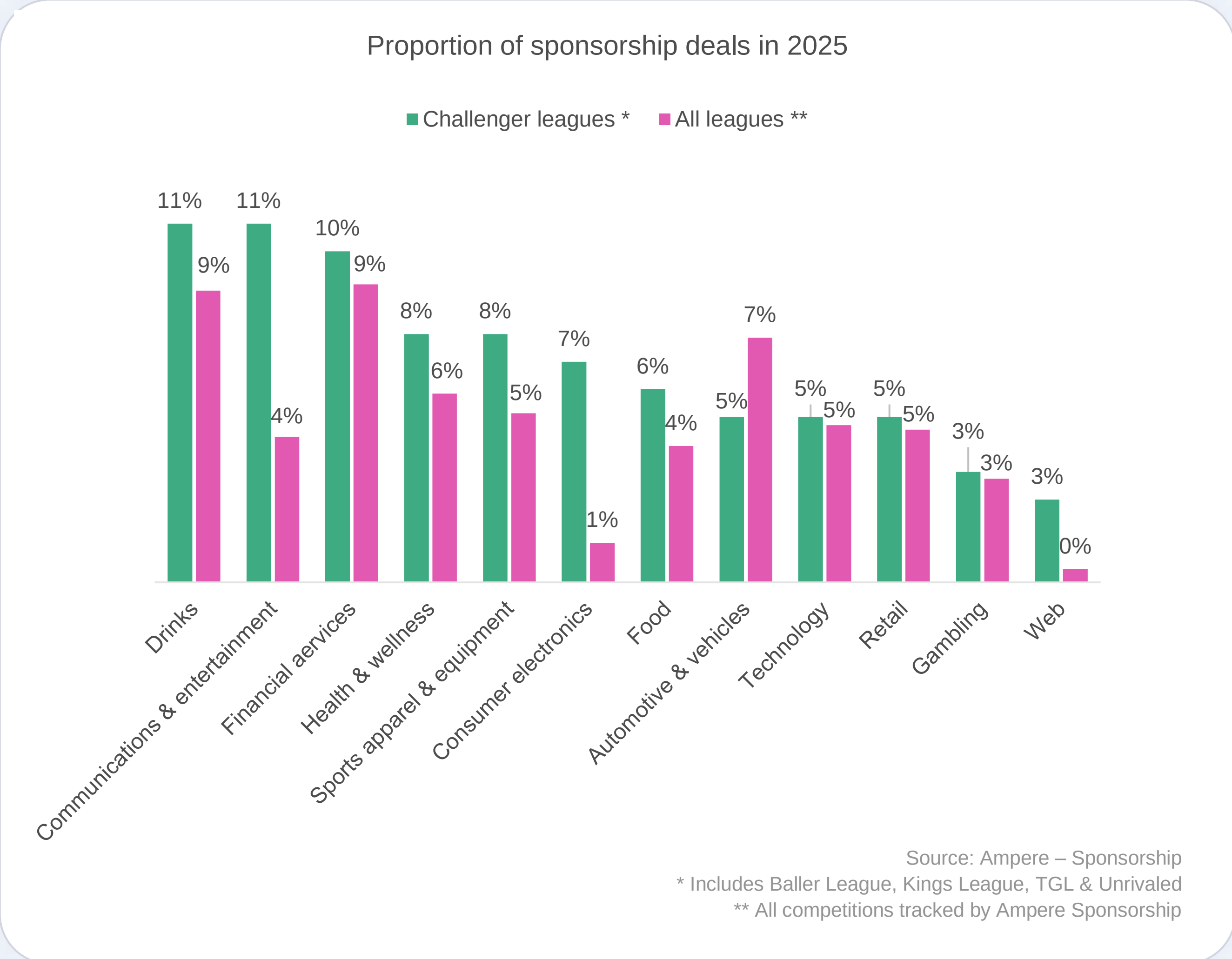
So, why are sponsors choosing to invest in challenger leagues?

The rationale for sponsorship of challenger leagues is similar to that of traditional leagues. Brands invest for visibility; viewership and engagement metrics for competitions like Kings League and the Baller League are high, with companies such as PepsiCo signing front-of-shirt deals across Baller League UK teams.

However, challenger leagues also offer sponsors unique activation opportunities and alignment with league values such as innovation, challenging the status quo, and fun. For example, Philips OneBlade sponsors a haircut-interview feature with Baller League influencers; JD, Red Bull and Proofpoint sponsor gamified match-play elements such as dice rolls and hammer throws in Kings

League and TGL, and O2 has acquired the rights to display its logo on the Baller League halfway circle. Little is off the table for sponsors from a creative standpoint, allowing brands to embed themselves in new sporting traditions as those traditions evolve.

The creativity afforded to sponsors has attracted a large number of consumer-facing brands, with the communications & entertainment, consumer electronics, cosmetics and web sectors proportionally more prevalent than in traditional sports.



Spokespeople for the Kings League and Baller League have emphasised that challenger leagues supplement traditional sports consumption, rather than cannibalise it. However, if challenger leagues become more prevalent in 2026 and the years that follow, companies will have more choice than ever over where sports-sponsorship budgets are spent. Major sports leagues such as the Premier League and the NFL should remain secure, but the long tail of smaller sports leagues will need to innovate quickly to keep pace with the creative buy-in and distinctive audience demographics that challenger leagues offer sponsors. Teams within these leagues are also beginning to sign independent deals, which will only intensify competition.

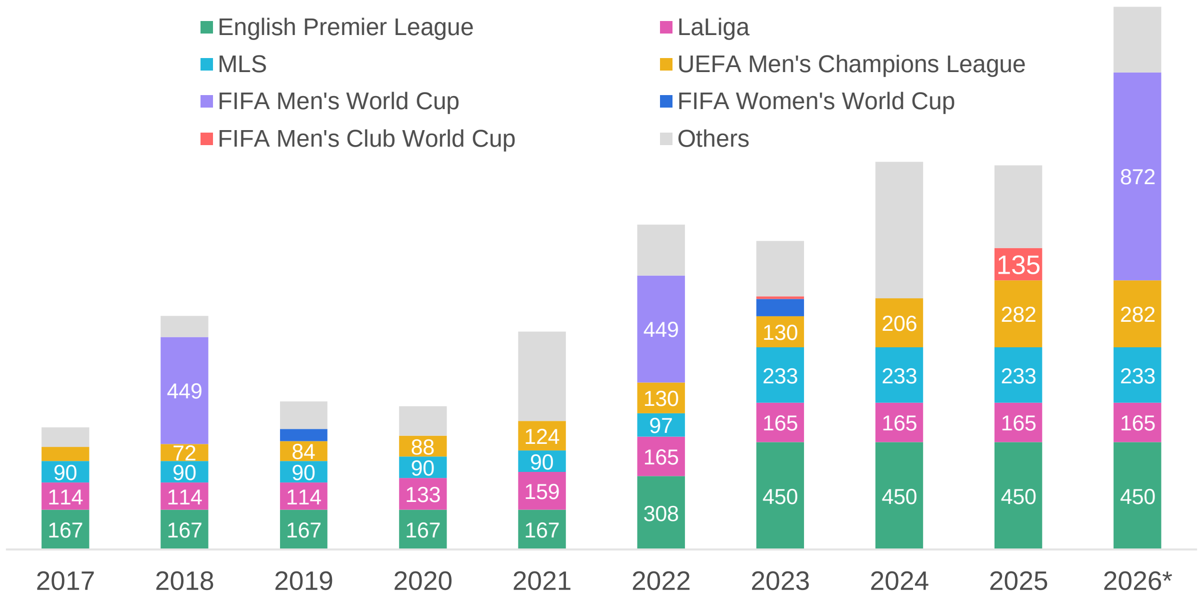
AMPERE | SPORTS

US holds the cards to football (soccer) revenue growth

The US will be at the centre of the football world for the next 5 years

Football is the most popular sport globally, consistently topping the list of most-enjoyed sports in 14 out of the 20 markets surveyed in Ampere's annual Sports - Consumer survey. However, it has historically been less popular in the USA, typically ranking behind American football, basketball and baseball. Despite this, for many years football teams and competitions have sought to "break into" the US market – attracted by the higher average spend by consumers, broadcasters and sponsors alike. Indeed, sports fans in the US are willing to spend an average of $32.87 per month on all sports content; compared to an average of $24.88 across the 'big five' European markets (France, Germany, Italy, Spain and UK).

USA, value of football TV rights by event ($m)



Source: Ampere Sports – Media Rights
*Confirmed deals only for 2026

The attempts to grow football in the US are starting to bear fruit: In 2026, the value of rights for football competitions agreed so far in the US will reach a peak of $2.3bn, up 67% from the last FIFA World Cup year in 2022, and more than double the value of 2018. In addition to increases in value for the FIFA World Cup in 2026, due to it being co-hosted by the US alongside Canada and Mexico, uplifts in football rights spend have also come from club competitions. This includes Apple's $250m-a-season global investment in MLS rights (boosted by the arrival of Lionel Messi at Inter Miami in 2023) and large increases in the most recent rights cycles for both the English Premier League (EPL) and the UEFA Champions League

$2.3bn

the projected peak value of football competition rights in the US for 2026

(UCL). Rights to both competitions have more than doubled, with NBC Universal now paying $450m per season (up from $167m) for the EPL, while Paramount's UCL deal rose 150% to $217m a year (from $87m).

That epicentre of many of football's largest global events. This started with the US hosting the FIFA Club World Cup in 2025, but is also set to include not just the FIFA Men's World Cup this year but also the LA Summer Olympics in 2028 and the FIFA Women's World Cup in 2031, for which the USA is the sole bidder along with Mexico, Costa Rica and Jamaica.

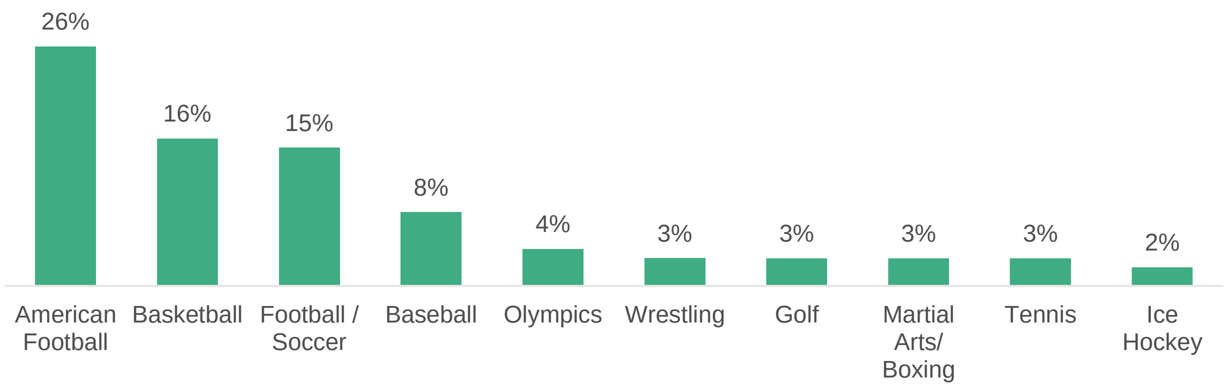
Which events and leagues stand to benefit?

FIFA, UEFA and other major football leagues and events will be hoping to use this five-year window to grow revenues from the valuable US audience through rights sales and sponsorship deals. In fact, in anticipation, many of the big European leagues have already strengthened their presence in the USA by opening local offices, while UEFA has partnered with US-based agency Relevent for its rights sales in the country since 2024 and globally from 2027. So, who stands to benefit most from the deluge of US-based football events?

> Football is now the **third most popular "favourite sport"** in the USA

According to Ampere's Sports – Consumer survey (Q4 2025), football is now ranked third among 'favourite sports' in the USA, beating baseball, ice hockey and the Olympics. This growth in the sport's overall popularity is also reflected in fans' engagement with major competitions. Fandom of the English Premier League has increased from 8% of US sports fans in Q4 2023 to 10% in 2025. Fans of these competitions are also highly engaged, with 76% of both EPL and UCL fans saying they watch the competitions live, despite the less favourable time slots for the market.

USA, proportion of sports fans who say each sport is their favourite



Source: Ampere Sports – Consumer, Q4 2025

Even though there hasn't been a FIFA Men's World Cup since 2022, the proportion of fans interested in the tournament has grown from 9% to 15% over the past two years, which means that the 2026 home edition is already starting from a strong base from which to grow further engagement.

One of the largest increases in fandom year-on-year is for Spain's LaLiga, which has seen fandom double from 3% to 6%. Its rights are currently valued similarly to the EPL before that league secured its significant increase, so LaLiga will be hoping to secure a similar uplift when its rights come up for renewal in 2029. The proposed match between Villarreal and Barcelona that was due to take place in Miami would have provided an additional window into the league for US fans, so the league no doubt sees this as a missed opportunity for showcasing its offer.

Closer to home, the announcement in November 2025 that the MLS and Apple TV will end their streaming partnership three and a half years early, points to the domestic league also seeing an opportunity to capitalise on the growth of the sport and look for new broadcast partners from 2029.

2026 World Cup lays the groundwork for greater US sponsorship investment

$2.2bn

the estimated marketing and commercial rights revenue for the 2026 tournament, up **23%**

A further tool to help grow engagement is through the FIFA sponsors who will be activating the competition. With its expanded 48-team, 104-match format, the competition will deliver 60% more inventory than the 2022 edition, and this unprecedented scale is translating directly into commercial opportunity. Indeed, while the 2022 World Cup generated approximately $1.74bn in sponsorship revenue for FIFA, Ampere estimates the 2026 tournament will reach at least $2.2bn in marketing and commercial rights revenue, marking a 23% increase that reflects both the tournament's enlarged footprint and its strategic positioning across North American markets.

The geographic composition of the sponsor roster tells a compelling story of localisation. The massive growth in US sponsorship associated with the World Cup represents a great opportunity for brands that can leverage the global reach of the event. Of the 21 partners announced thus far, 57% are headquartered in the USA, marking a dramatic pivot from Qatar 2022's more globally distributed partner base, where American brands represented just 31% of the total. This shift extends beyond mere numbers: A brand such as Home Depot is deploying hyper-local strategies, focusing on Atlanta where it is headquartered and even exploring city-specific supporter deals to supplement its tournament sponsorship. The expansion to 16 host cities creates new territories for fan zone deployment and grassroots engagement, particularly for brands seeking to connect with supporters of smaller nations who may not have significant stadium presence.

Another interesting addition to the sponsorship roster is American Airlines. Given the geographical scope of this year's World Cup, it makes sense that a regional airline was brought on to facilitate transport for fans between the three countries, but this is the first time that FIFA has allowed another airline to sponsor the tournament alongside its main airline partner Qatar Airways.

This granular approach to activation reflects a sophistication in how brands are prioritising cities with the most matches and aligning investment with their existing commercial strongholds. As noted, major

European football leagues such as the Premier League, Serie A and LaLiga have recently opened offices in New York, positioning themselves to capitalise on this momentum and strengthen their foothold in the US market. Interestingly, however, no major partners for the tournament have yet been signed from Canada or Mexico.

Key Deals:

Brand	Category	Rights	% of overall sponsorship revenue	Brand headquarters
DoorDash (with Deliveroo)	Food delivery	FIFA World Cup sponsor	9.2%	USA
Bank of America	Banking	FIFA World Cup sponsor	7.8%	USA
Verizon	Communications & television providers	FIFA World Cup sponsor	5.8%	USA
American Airlines	Airlines	FIFA World Cup sponsor	5.2%	USA
Unilever	Personal care	FIFA World Cup sponsor	4.5%	UK
Frito-Lay	Non-perishables	FIFA World Cup sponsor	4.3%	USA
The Home Depot	Retail	FIFA World Cup supporter (regional rights)	2.6%	USA
Diageo	Spirits/liqueurs	FIFA World Cup supporter (regional rights)	2%	UK
Globant	IT services	FIFA World Cup supporter (regional rights)	1.7%	Luxembourg
Lego	Toys	FIFA World Cup supporter (regional rights)	1.3%	Denmark
Rock-It Cargo	Logistics	FIFA World Cup supporter (regional rights)	1.2%	USA
Valvoline	Automotive parts & products	FIFA World Cup supporter (regional rights)	1.1%	USA

Source: Ampere – Sponsorship

Meanwhile, from an industry perspective, the 2026 tournament shows a greater diversity of partners. While financial services dominated the Qatar World Cup with six deals (and remains the highest industry by spend in 2026), the North American World Cup edition sees deals more evenly split, with financial services, drinks, automotive, retail, and consumer electronics all securing multiple partnerships. The strong level of spending by financial services is sustained by brands such as Visa and the arrival of Bank of America as a global sponsor for the tournament via a landmark $100m deal with FIFA that covered both the FIFA Club World Cup in 2025 as well as the World Cup this year.

Some new categories of brands have also entered the sponsorship roster for a FIFA tournament with brands like Lego, Rock-it Cargo, and DoorDash paving the way for other similar brands. Most interestingly, we have seen an uptick in brands from the drinks sector, a category prominent across all major US sports leagues. Coca-Cola has long been associated with FIFA as a global partner, but Anheuser Busch and Diageo have recently signed on to sponsor this year's World Cup. As these brands are already well established in the US, they will aim to capitalise on the growth in opportunity for US investment in football specifically.

In addition, FIFA has announced that regardless of the weather conditions during the tournament, three-minute hydration breaks will take place during each half of every match for players' welfare. As a result of these breaks, FIFA has unlocked another commercial opportunity for 312 minutes of broadcast ad inventory. Football fans can be reluctant to change and a break during each half of every match might frustrate some who will want to see the natural flow of the game progress, but in an era where commercial rights growth is stagnant, FIFA may have found the key to future success.

Regulation will impact Premier League sponsorship in 2026

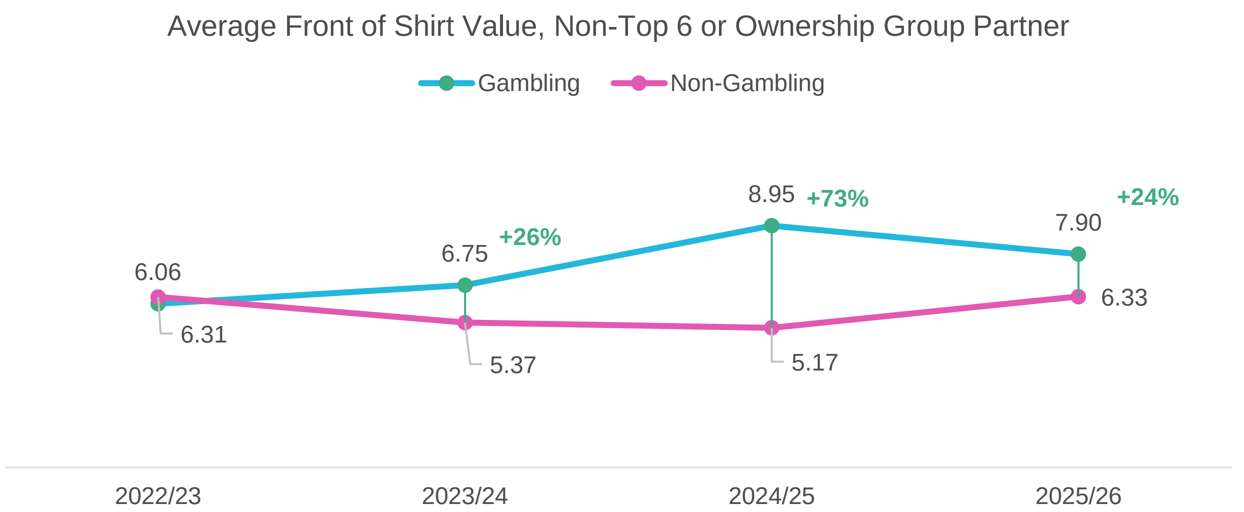
What impact will the incoming gambling legislation have?

In 2023, English Premier League (EPL) clubs agreed to withdraw gambling sponsorship from the front of their matchday shirts starting in 2026/2027, in conjunction with the presentation of a gambling policy white paper from the Department for Culture, Media, and Sport (DCMS) to Parliament. The agreement was driven by societal reasons, as part of a wider move towards stronger gambling regulation, and part of a desire to fight against addiction, and better protect children.

£89m

the annual revenue generated by the gambling sector

Yet for EPL clubs, the financial repercussions are potentially substantial. The gambling sector currently represents £89m in annual revenue and 25% of the total EPL front-of-shirt market – up from 12% in 2022 – and in 2025/26 11 clubs currently have gambling sponsors on the front of their shirts. As the traditional top six clubs (Arsenal, Chelsea, Liverpool, Manchester United, Manchester City, and Tottenham Hotspur) have avoided gambling partners in key assets (instead containing them within their official partner status) the impact of this regulation will instead fall on the remaining 14 Premier League teams.



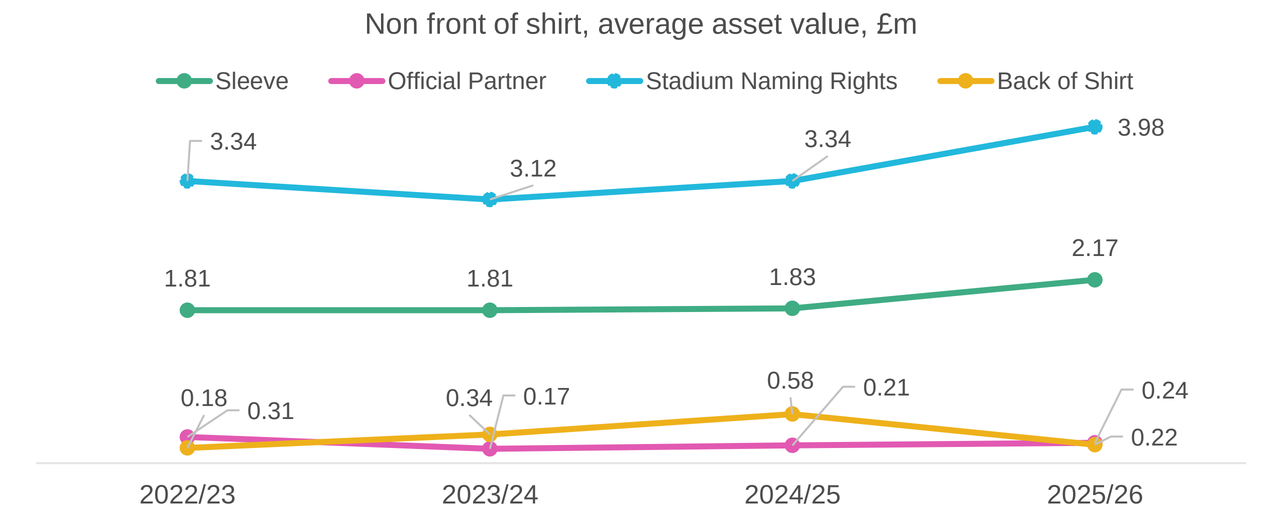
Source: Ampere Sponsorship

For these teams, gambling represents 68% of front-of-shirt deal spend – up from 56% in 2022 – and Ampere's data suggests that the value of a gambling sponsor front-of-shirt equates to somewhere between a 25-75% differential above non-betting sponsors. This data is noisy, as not all teams are equal and some major teams such as Newcastle do not have gambling partners - but the findings align with figures from West Ham United vice-chairman Karren Brady, who told the House of Lords in the UK in 2024 that the economic difference between gambling and non-gambling sponsors was around 40%.

The withdrawal of gambling brands from front-of-shirt sponsorship in the middle of 2026 will therefore have immediate ramifications for the league and poses two key questions: Where will gambling brands pivot to with front-of-shirt denied; and which industries will clubs look to next for their most valued asset?

How will the gambling companies and the EPL teams adapt?

Assuming gambling brands want to stay on team kits – which seems likely given that data from the UK Gambling Commission shows that football accounted for £9.6bn (40%) of all online sporting wagers placed in the UK in 2023 – it is most likely that they will pivot towards other sponsorship assets, with two in particular standing out. The first is sleeve sponsorship, the next-most prominent asset in terms of visibility and value. With up to eight of the clubs in the Premier League having the sleeve asset available next season, and Leeds and Crystal Palace already having gambling deals, this could cause an uptick in the fees paid for the asset. Given the average value sits at just over £2m for clubs' sleeves, it is likely that this could grow by around 50%, towards a £3m average.



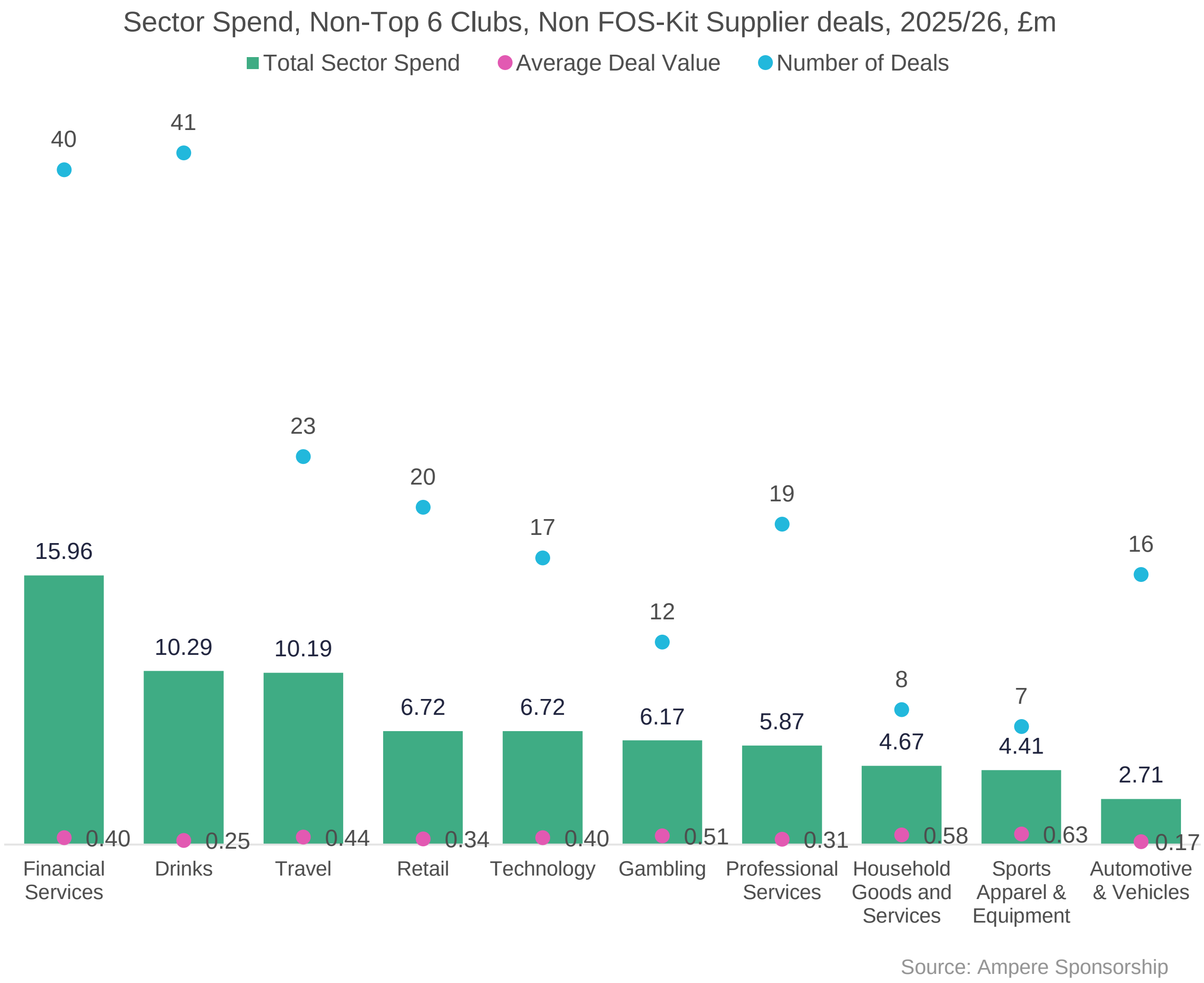
Source: Ampere Sponsorship

Aside from kit sponsorship, the other major way gambling brands gain significant visibility is through official partnerships, particularly via in-stadium signage and LED boards, which showcase the brands to both the stadium crowd and television viewers. The DCMS white paper itself stated that “According to the Gambling Commission, 85% of adults reported ever seeing gambling advertising or sponsorships, with 6 in 10 reporting seeing them at least once a week”. This is likely to mean that official and exclusive gambling partnerships will likely see a small yet meaningful bump in value as current gambling brands look to stay with clubs in different capacities to maintain their reach.

Even with this, there is likely to be a potential loss of revenue for many EPL teams in the short-term. To counterbalance this, clubs are looking to maximise what they can offer new entrants, meaning that other assets – such as training kits and training facilities naming rights – have also begun to creep into conversation as strong assets for brands to sponsor. One by-product of the new regulations, therefore, is likely to be greater creativity in sponsorship deals, with a wider array of assets available.

Which sectors will step into the void vacated by gambling companies?

The question for the majority of EPL clubs in 2026 remains: which sectors are most likely fill the gap left by gambling for front-of-shirt deals? To answer this, we have examined all historical sponsorship deals for non kit-related assets amongst the 14 EPL clubs affected by the regulation, to identify sectors that already work with EPL clubs, and could be primed to increase spend. This analysis reveals six sectors that have the strongest chance to take over for the front-of-shirt sponsors: banking, crypto, drinks, fintech, payments and travel/airlines.



- In **banking,** challenger banks such as Monzo, Starling, Wise, and Revolut have grown over the past few years and have begun to enter the sponsorship space. Revolut's (yet-to-debut) deal with Audi in F1 is a sizeable deal, indicating seriousness in its entrance into sponsorship

- While **crypto** has a slight decline in its number of deals since 2022, crypto deals have matured and are still present as a willing market player

- **Drink brands** may see a return to form with a recent uptick in non-alcoholic brands being promoted across rightsholders in Formula 1, Six Nations, and select front-of-shirt deals in LaLiga, pointing to a possibility for the Premier League

- **Fintech**, meanwhile, has seen a 100% increase in the number of deals signed in the last three years, pointing to an emerging category within financial services

- **Payment** companies such as Visa, Mastercard, and Amex (a key sponsor at Brighton), remain perennial players

- **Travel/airlines** such as Emirates and Etihad are stalwarts and remain uncontested in the front-of-shirt market looking across all teams. Additionally with **tourism**’s number of deals on the rise, this sector may be a candidate for several teams with ownership ties internationally such as Bournemouth with Las Vegas

Ultimately, there is a need to separate short-term and long-term strategy here, for both clubs and brands alike. Starting next season, the EPL is about to have major assets available for new partners, at an unprecedented scale of opportunity. In the short run, this will see the average revenue of clubs take a sizeable hit – given both the inflationary fees paid historically by gambling brands, and the dilution of value created by the sudden availability of the asset *en masse.*

However, clubs need to have their eyes on the longer-term – as the Premier League's continued growth both across Europe and worldwide and across Europe means that EPL sponsorship remains an increasingly valuable opportunity for a lot of companies and sectors. If clubs focus on directing gambling spend towards assets with less current visibility, building new front-of-shirt deals with burgeoning industries, and creating new sponsorship assets that expand their footprint, then the most likely outcome will be that the 2026/2027 season is a blip, from which the overall growth of sponsorship will soon recover.

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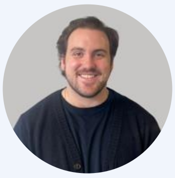

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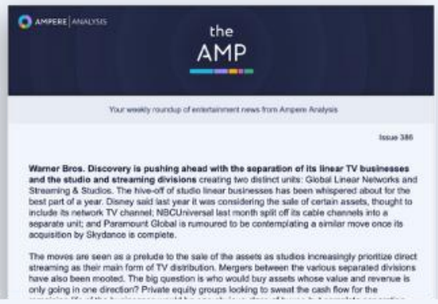

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the AMP

Your weekly roundup of entertainment news from Ampere Analysis

Issue 386

Warner Bros. Discovery is pushing ahead with the separation of its linear TV businesses and the studio and streaming divisions creating two distinct units: Global Linear Networks and Streaming & Studios. The hive-off of studio linear businesses has been whispered about for the best part of a year. Disney said last year it was considering the sale of certain assets, thought to include its network TV channel; NBCUniversal last month split off its cable channels into a separate unit; and Paramount Global is rumoured to be contemplating a similar move once its acquisition by Skydance is complete.

The moves are seen as a prelude to the sale of the assets as studios increasingly prioritize direct streaming as their main form of TV distribution. Mergers between the various separated divisions have also been mooted. The big question is who would buy assets whose value and revenue is only going in one direction? Private equity groups looking to sweat the cash flow for the

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