Television and Mega-Sporting Events in the Digital Era: Public Broadcasting, Platform Rivalry, and the Future of Live Coverage

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Abstract: Mega-sporting events such as the Olympic Games and the FIFA World Cup remain the last category of programming capable of assembling vast simultaneous audiences, which gives them a privileged position in an otherwise fragmented media economy. This paper examines how television coverage of mega-sporting events is being reorganised in the digital era along three interlocking dimensions: the market dimension, in which global streaming platforms and technology companies now rival, and frequently outbid, traditional broadcasters for premium rights; the institutional dimension, in which public service media defend a universality mandate that is legally underwritten by the listed events regime of European audiovisual law; and the technological dimension, in which cloud infrastructure, artificial intelligence, ultra-high-definition formats and platform-native content are transforming both the production and the consumption of live sport. Drawing on a narrative review of scholarship, policy documents and industry sources published mainly between 2021 and 2026, the paper argues that the age of broadcast scarcity has given way to a hybrid ecology in which platforms, public broadcasters and creator-driven channels coexist and compete. The future of live coverage is likely to be commercially platform-led but culturally anchored in free-to-air access, with the forthcoming revision of the Audiovisual Media Services Directive acting as the decisive regulatory hinge.

Keywords: mega-sporting events; sports broadcasting; streaming platforms; public service media; media rights; artificial intelligence; Audiovisual Media Services Directive

1. Introduction

Few genres reveal the historical trajectory of television as sharply as the live coverage of mega-sporting events. In media systems otherwise defined by fragmentation, on-demand viewing and algorithmic personalisation, the Olympic Games, the FIFA World Cup and the continental football championships remain among the last programme categories able to assemble enormous simultaneous audiences and to operate as shared rituals of national and global life (Wenner, 2022). Precisely because of this scarcity value, mega events now sit at the centre of an intense struggle between free-to-air broadcasters, pay-television operators, streaming services and global technology companies, while their coverage has migrated across an expanding constellation of screens, services and formats (Lee Ludvigsen & Petersen-Wagner, 2023). Understanding how this migration is unfolding, and what it means for the institution of television, is the purpose of this paper.

The political economy of this transformation has deep roots. Turner (2007), drawing on Todreas, periodised audiovisual broadcasting into a broadcast era (roughly 1950 to 1975), a cable and subscription era beginning in the 1980s, and a digital era emerging from the mid-1990s onwards, and argued that digitalisation produces a great value shift in which distribution conduits become interchangeable commodities while premium content, above all high-profile sport, becomes the branded, high value-added product. The empirical record already supported that diagnosis at the time: the world market for television sports rights was estimated at 48.4 billion euros in 2000, annual broadcasting revenue in the leading football leagues of England, France, Germany and Italy rose from roughly 0.3 to 1.6 billion pounds within a single decade, and the English Premier League expected 1.275 billion dollars from international rights alone in the cycle starting in 2007-2008, with Asian markets contributing more than half of that sum (Turner, 2007). Sport, in other words, became the battering ram with which successive waves of distribution technology entered the household.

Two decades later the cast of buyers has changed dramatically. Amazon overtook the sports streaming specialist DAZN to become the largest single spender on sports media rights worldwide in 2026 (Clover, 2026); Apple became the exclusive broadcast partner of Formula 1 in the United States (Apple, 2025); and Netflix, once openly sceptical of live programming, built an event-driven sports portfolio around American football, wrestling and boxing (VideoWeek, 2025). Audiences, for their part, have loosened their attachment to any particular delivery technology: recent European evidence indicates that around 39 percent of sports viewers are indifferent as to whether they watch an event on streaming or on television, privileging the content over the medium (European Commission, 2025a). Regulators have taken notice, and the European Union is preparing an ex-post evaluation and possible revision of the Audiovisual Media Services Directive, the instrument that guarantees free public access to events of major importance for society (de la Vega, 2025).

Against this backdrop, the paper addresses three questions. First, how has the market organisation of mega-event coverage changed as platform rivalry has intensified, and with what consequences for audiences? Second, what role remains for public service broadcasting, and for the European regulation of universal access, in a rights market increasingly dominated by global platforms? Third, how are new production and distribution technologies reshaping live coverage, and what plausible futures do current trajectories suggest? These questions matter beyond media economics. Because mega events condense questions of national identity, public culture and equality of access, the way they are televised is a sensitive indicator of how digital societies allocate their most valuable collective attention.

Methodologically, the paper takes the form of a conceptual, integrative narrative review. It synthesises three bodies of material: peer-reviewed scholarship on sport, media and communication published mainly from 2021 onwards; European policy instruments, decisions and reports concerning audiovisual regulation; and documented industry developments up to early 2026. The argument proceeds in six steps. Section 2 situates mega events within the sport-media complex and its economics. Section 3 traces the shift from broadcast television to platform competition. Sections 4 and 5 examine public broadcasting and the listed events regime respectively. Section 6 analyses the technological transformation of live production and consumption, and Section 7 outlines the plausible futures of live sports coverage before the conclusion draws the threads together.

2. Mega-Sporting Events and the Sport-Media Complex

Mega-sporting events are conventionally distinguished from ordinary fixtures by their scale, their fixed and globally coordinated calendar, their organiser monopolies and their extraordinary societal footprint. European audiovisual law captures the same intuition in juridical form: events of major importance must be outstanding occasions of interest to the general public, organised in advance by an organiser who is legally entitled to sell the rights pertaining to them (de la Vega, 2025). Their material weight is equally distinctive. A systematic evaluation of the sustainability of the Olympic Games between 1992 and 2020 found that the model has become larger, costlier and, on balance, less sustainable over time, a finding that underlines both the economic magnitude of these events and the mounting pressure on hosts and organisers to justify them (Müller et al., 2021). Because a mega event is scarce, scheduled and globally legible, it constitutes the purest form of what the television industry calls appointment viewing.

The relationship between sport and media that sustains these events is best understood as a complex of mutually constitutive institutions rather than a simple buyer-seller exchange. The contemporary literature describes an interlocking system of sport organisations, media companies, sponsors, states and audiences in which each party's value depends on the others (Wenner, 2022). Stavros, Smith and Lopez-Gonzalez (2022) formalise this interdependence in a mediasport typology of escalating compositions, moving from enlargement, in which broadcasting extends the reach of sport, through enhancement and connection, in which coverage is augmented and made interactive, to engagement, in which the media-sport-consumer relationship becomes radically compressed and immersive. Crucially, they argue that the COVID-19 pandemic accelerated movement toward the engagement pole, permanently transforming the expectations that consumers bring to mediated sport (Stavros et al., 2022).

Two institutional features give mega events their distinctive televisual character. The first is ritual simultaneity: unlike library content, a mega event exists only once, in real time, and its meaning depends on the knowledge that others are watching at the same moment, which is why it still functions as one of the last shared campfires of national and transnational publics (Wenner, 2022). The second is the host broadcasting model. For the Olympic Games, a dedicated host broadcaster, Olympic Broadcasting Services, produces the neutral international feeds of every competition, which national rights holders then customise with their own commentary, studio programming and national storylines (Alibaba Cloud, 2024). Coverage of a mega event is therefore always a layered co-production between a global production hub and dozens of national media systems, and the digital footprint of the event now extends far beyond these feeds into continuous platform activity between editions (Lee Ludvigsen & Petersen-Wagner, 2023).

The economics of the complex explain why mega-event rights have inflated so consistently. On the supply side, leagues, federations and event owners such as the International Olympic Committee and FIFA operate as supply-side monopolists facing several competing purchasers, a market structure that confers formidable bargaining power, especially once deregulation multiplied the number of eligible buyers (Turner, 2007). Exclusivity commands a premium because the value of sport lies in its capacity to deliver large, engaged and demographically attractive audiences in real time. In recent years this market has also acquired an explicitly geopolitical dimension: states, sovereign investors and new pools of capital have entered the ownership and hosting of sport properties, so that rights strategies can no longer be read in purely commercial terms but form part of a wider geopolitical economy of sport (Chadwick, 2022).

The demand side is more differentiated than the rhetoric of universal appeal suggests. Econometric modelling of audience size for televised football demonstrates that viewership responds systematically to the sporting significance of the fixture, the scheduling slot and the drawing power of the participating teams, which makes a small number of matches disproportionately valuable within any rights package (Buraimo et al., 2022). Repertoire-based audience research points in the same direction. Analysing several years of Korean viewing logs, Oh and Kang (2022) found that sports content commanded intense loyalty from a relatively small cluster of fanatic viewers, typically middle-aged men, whereas for general audiences comedy and drama consistently outcompeted sport; they also showed that sports programmes are unusually vulnerable to channel switching during natural interruptions in play. Everyday sport, in short, is minority programming. The mega event is the periodic exception in which sport briefly becomes universal content, capable of attracting entertainment seekers, information seekers and casual viewers alongside the devoted fan base. The mega event's capacity to unify these strata explains its regulatory as well as its commercial exceptionalism: it is the one moment when the minority taste of everyday sport becomes, however briefly, the majority experience of an entire society, and it is exactly this convertibility that platforms and legislators are now competing to control.

Contemporary European data confirm that this broad base still exists, but also that it is stratified. Roughly 13 percent of Europeans report watching sport daily and 45 percent at least weekly, yet a substantial share of sports viewers no longer distinguishes between broadcast and streaming as a mode of access (European Commission, 2025a, 2025b). Two further features of the complex deserve emphasis because they condition everything that follows. The first is fragility. The pandemic operated as a natural experiment that exposed the total dependence of professional sport on mediated revenue: postponed and closed-door events, including the delayed Tokyo Games, threatened the financial viability of entire competition systems (Grix et al., 2021), and the formula of no sports, no spectators, no media and no money captured how broadcasting fees became the lifeline of professional leagues (Horky, 2021).

The second feature is inequality. A thirty-year longitudinal study of televised sports news and highlights in the United States found that coverage of women's sport remained frozen at around five percent of airtime, with individual women's events typically treated as one-off curiosities rather than continuing stories (Cooky et al., 2021). Mega events have historically been among the few windows in which women's sport achieves visibility at scale, a fact that, as later sections show, is now reshaping both commercial rights strategies and the regulatory lists of protected events.

3. From Broadcast Television to Platform Competition

The long transition that frames current platform rivalry can be summarised through the eras identified by Turner (2007). In the broadcast era, a handful of networks controlled heavily regulated distribution and sport received modest fees. In the cable era, subscription operators and dedicated sports channels bid up rights and shifted premium sport behind payment. In the digital era, beginning in the mid-1990s, the multiplication of conduits, from satellite and cable to broadband and mobile telephony, commoditised distribution and produced the great value shift toward content. Turner (2007) also anticipated the mechanics of today's market with striking precision: rights would be unbundled into distinct windows, including live, delayed, highlights, news and archival on-demand exploitation; exclusivity would give way to semi-exclusivity and cherry picking; and packaging would increasingly be organised by time-part rather than by platform, as the English Premier League's technology-neutral tenders already demonstrated.

What Turner could only partially foresee was the institutional form the new buyers would take. The subscription video-on-demand model perfected by Netflix rests on global scale, deep on-demand libraries, direct customer relationships, data-driven commissioning and, more recently, advertising tiers, an economic logic initially hostile to live sport, whose rights are expensive, territorially fragmented and perishable (Lotz, 2021, 2022). That calculus changed as subscriber growth in mature markets slowed and as churn reduction and advertising reach became the strategic priorities. Live sport is uniquely suited to both: it recruits new subscribers in concentrated bursts, gives existing subscribers a weekly reason to stay, and delivers the mass simultaneous attention that advertisers can find almost nowhere else.

The result has been a decade of high-profile entries by the world's largest technology companies. Amazon moved from streaming Premier League and NFL packages to becoming, by 2026, the single largest spender on sports media rights worldwide, overtaking DAZN (Clover, 2026). Apple signed a ten-year global agreement to present every Major League Soccer match from 2023 (Apple, 2022) and subsequently became the exclusive United States broadcast partner of Formula 1 (Apple, 2025). YouTube evolved from a highlight's repository into a primary rights holder, carrying the NFL's premium out-of-market package and concluding a preferred platform agreement with FIFA for the 2026 World Cup under which extended highlights, shorts, video-on-demand content, the first ten minutes of every match and even selected full matches appear on the platform (FIFA, 2026). Netflix pursued a deliberately event-driven strategy built around big breakthrough occasions rather than full seasons: Christmas Day NFL games, marquee boxing cards and the transformation of WWE Raw into a weekly live pillar available in more than ninety countries (VideoWeek, 2025), to which it added exclusive United States rights to the FIFA Women's World Cups of 2027 and 2031 (Satin, 2026). The pattern across these entries is consistent: platforms buy the properties whose event characteristics most resemble their existing hits, favouring global legibility, concentrated scheduling and franchise potential over the grinding localism of full domestic seasons (VideoWeek, 2025).

European football illustrates how thoroughly the platform logic has penetrated domestic markets as well. In Spain, Movistar+ and DAZN secured LaLiga's domestic rights for the 2027-2032 cycle in a deal reported at 6.135 billion euros (El Confidencial, 2025), while in Germany Paramount+ broke into the market by acquiring packages of UEFA Champions League matches (Der Spiegel, 2025). The competitive field for any major property now routinely includes public broadcasters, commercial free-to-air networks, pay-television incumbents, telecommunications operators, sports-specialist streamers and global platforms, exactly the proliferation of buyers that strengthens the bargaining position of rights owners (Turner, 2007).

Alongside the technology giants stand the sports-specialist streamers. Services such as DAZN and BEIN reorganised the middle of the market by aggregating large volumes of live rights into subscription products, and their trajectory illustrates both the promise and the fragility of the pure-play model: DAZN led global rights expenditure for years before being overtaken by Amazon, whose sports budget is subsidised by an entirely different underlying business (Clover, 2026; de la Vega, 2025). Traditional pay-television, meanwhile, faces the structural erosion of its bundle as households migrate to broadband-delivered services, a dynamic that simultaneously weakens the incumbents' capacity to pay and raises the strategic value of sport as the last content category that reliably retains subscribers (Lotz, 2021). The rights market of the mid-2020s is therefore not a simple succession of platforms after broadcasters but a crowded and unstable field in which each type of buyer monetises the same event through a different economic logic.

Platformisation has also transformed the rights holders themselves into media operators. Comparative analysis of the big five European football leagues shows that they now behave as complementors within YouTube's algorithmic and monetisation logics, adapting content strategy to the platform's incentives rather than merely licensing footage away (Petersen-Wagner & Lee Ludvigsen, 2023a), while the Olympic Games have become paradigmatic of hyper-digitalised mega events whose production, consumption and prosumption unfold across the platform society (Lee Ludvigsen & Petersen-Wagner, 2023). Above this institutional layer sits an increasingly consequential creator economy. The German Bundesliga awarded live streaming rights to the YouTuber Mark Goldbridge, known for his football watchalongs, and to Gary Neville's channel The Overlap (Harris, 2025); in Spain, the streamer Ibai Llanos famously co-commentated LaLiga matches on Twitch in cooperation with the rights holder Movistar (La Razón, 2021); and industry commentary now openly urges broadcasters to integrate influencers into mainstream sports coverage (Fabiani, 2024).

The consequences of this abundance are ambivalent. For rights owners, competition among platforms sustains valuations. For audiences, however, fragmentation multiplies the subscriptions required to follow a single competition, complicates discoverability and strengthens the incentives for piracy that accompany every dispersion of premium content (Lotz, 2021). Fandom itself has been reorganised into digitally networked cultures that span official broadcasts, social platforms and creator channels (Lawrence & Crawford, 2022), and younger Europeans in particular display digital-first, highlights-first consumption patterns that bypass full-match broadcasts altogether (European Commission, 2025a). It is precisely this tension between commercial abundance and universal access that returns public broadcasting and regulation to the centre of the story.

4. Public Broadcasting and Mega-Sporting Events

Public service media occupy a distinctive position in the sports rights economy because their claim on mega events is normative before it is commercial. The public service compact rests on universality of access, distinctiveness of provision and the cultivation of citizenship and social cohesion, obligations codified in European law and national charters (Donders, 2021). Live sport has historically been central to that compact: no other genre so reliably gathers an entire national audience around a single narrative, and no other genre demonstrates so visibly that a licence fee or public subsidy purchases something the market would otherwise enclose.

The economic and social stakes are quantifiable. The European Broadcasting Union (EBU) estimates that the free-to-air sports broadcasting activities of its members' public service media are worth 4.9 billion euros to Europe's gross domestic product, alongside harder-to-price contributions to participation, national visibility for smaller disciplines and the shared moments that structure collective memory (EBU, 2024a). For smaller European markets in particular, membership of the EBU and access to collectively negotiated rights have long been the mechanism through which national public broadcasters could guarantee that their publics would see the Olympic Games at all.

Universality function is most visible, and most precarious, in smaller media markets. For countries such as Greece, Portugal or the Baltic states, no domestic commercial buyer can realistically absorb the cost of exclusive Olympic or World Cup rights, and it is the public broadcaster, negotiating through the EBU or protected by national listing, that has historically guaranteed full national access to the Games, frequently across many hundreds of hours of programming per edition (EBU, 2024a; International Olympic Committee, 2023). Where public service media weaken, the first casualty is therefore not competition but coverage itself: minority disciplines, national athletes in unfashionable sports and audiences outside the pay ecosystem simply disappear from the screen (Donders, 2021).

Yet public service media face a double squeeze. Rights inflation driven by pay-television and platform competition has priced them out of much premium sport, while the same subscription services compete for the audiences and the political legitimacy on which public funding depends. Comparative research on public service media responses to the rise of subscription video-on-demand identifies a strategic repertoire that ranges from head-on competition through cooperation and partnership to the repositioning of public services as distinctive complements within a platform ecology (D'Arma et al., 2021). In sport, this repertoire translates into concentration on listed events, investment in highlights and magazine formats, sub-licensing arrangements with pay operators, and the migration of coverage to public streaming players and social platforms.

Public service media also do different things with the sport they retain. Comparative analysis of European public service sports desks on social media demonstrates measurably more diverse agendas, with systematically greater attention to underrepresented disciplines, sportswomen and disabled athletes than commercial outlets provide (Rojas-Torrijos & Ramon, 2021), and studies of the Tokyo 2020 Paralympic Games frame such coverage explicitly as a matter of cultural citizenship in the digital age (Ramon & Rojas-Torrijos, 2023). Given the documented long eclipse of women's sport in commercial television (Cooky et al., 2021), this corrective function has acquired regulatory recognition: France added women's competitions and the Paralympic Games to its national list of protected events in 2024, with the European Commission accepting that these events now have a special general resonance beyond their traditional followers (European Commission, 2024), while the United Kingdom added women's international football tournaments to its listed events regime in 2022 (Department for Digital, Culture, Media and Sport [DCMS], 2022). Listing, in this sense, does not merely protect audiences; it protects a particular editorial ecology in which coverage duties, rather than engagement metrics alone, decide what is shown.

The most consequential institutional innovation, however, is the hybrid partnership between public broadcasters and platforms. In 2023 the International Olympic Committee awarded all European media rights for the four Olympic Games of the 2026-2032 period jointly to the EBU and Warner Bros. Discovery: the EBU holds free-to-air television and digital rights across forty-nine territories, with every member committed to at least two hundred hours of Summer Games and one hundred hours of Winter Games coverage, while Warner Bros. Discovery remains the exclusive streaming home of every moment of the Games (International Olympic Committee, 2023). Paris 2024 previewed the logic of this settlement: record-breaking streaming consumption on the commercial partner's platforms coexisted with broad free-to-air reach through public broadcasters (de la Vega, 2025). Universality is thus being reconstructed as a division of labour, breadth through public television and depth through the platform.

Public service media are also learning from their own flagship properties how to occupy the platform layer directly. The Eurovision Song Contest, an EBU production listed as an event of major importance in several countries, attracted 7.3 million unique viewers to its official YouTube channel during the 2024 edition, with concurrent views of the Grand Final peaking at 1.6 million (EBU, 2024b). Meanwhile, even commercial Olympic broadcasters now recruit dozens of YouTube, Instagram and TikTok creators into their event coverage, as NBC Universal did for the 2026 Winter Games (Variety, 2025). The implication for public broadcasters is unambiguous: institutional trust and universal reach must be coupled with platform-native distribution, or the youngest audiences will encounter the mega event without ever encountering public media.

5. Regulating Universal Access: Events of Major Importance for Society

The legal architecture that protects free access to mega events emerged in the late 1990s, when the migration of premium sport behind pay-television paywalls first became politically salient. The United Kingdom's 1996 legislation introduced the concept of the listed event, and the 1997 revision of the Television Without Frontiers Directive, carried into Article 14 of the Audiovisual Media Services Directive (AVMSD) and mirrored in Article 9a of the European Convention on Transfrontier Television, empowered states to ensure that broadcasters do not exercise exclusive rights in ways that deprive a substantial proportion of the public of the possibility of following designated events by live or deferred coverage on free television (de la Vega, 2025).

The mechanism is optional but consequential. Member states may draw up national lists of designated events in a clear and transparent procedure; notified lists are verified by the European Commission, published in the Official Journal and then benefit from mutual recognition, binding even broadcasters established in other jurisdictions. Free television is understood as programme services with near-universal coverage that are accessible without payment beyond the prevailing modes of funding broadcasting. Eligibility rests on the criteria of Recital 52 and on four working indicators, of which at least two must normally be met: special general resonance beyond habitual followers of the sport; distinct cultural importance as a catalyst of identity; involvement of the national team in a major international event; and a tradition of free-to-air broadcast commanding large audiences. The Court of Justice has confirmed both the Commission's three-step compatibility test and the wide discretion of member states in giving substance to these criteria (de la Vega, 2025).

Three further design features deserve emphasis. First, the regime does not prohibit exclusivity; it disciplines its exercise, since member states determine whether a listed event must be made available through whole or partial live coverage or, where objectively justified in the public interest, through deferred coverage (de la Vega, 2025). Second, a pay operator that acquires a listed event may be required to sub-license it to a qualifying free-to-air broadcaster while retaining the right to serve its own subscribers, so that listing redistributes access rather than expropriating value. Third, Article 14(3) addresses the cross-border scenario in which a broadcaster established in one jurisdiction acquires exclusive rights to an event listed in another: responsibility then falls on the state of establishment under the country-of-origin principle, closing the most obvious circumvention route (de la Vega, 2025).

The resulting landscape is broad but uneven. Twenty-one European Union member states maintain national lists, ten of which have been notified at Union level, and the lists collectively cover more than one hundred competitions across seventeen disciplines in addition to the Olympic Games, with football and the Olympics forming the near-universal core (de la Vega, 2025). The clearest recent trend is the extension of protection to the Paralympic Games and to women's sport, visible in the updated French list accepted by the Commission in 2024 (European Commission, 2024) and in the United Kingdom's 2022 addition of women's international football (DCMS, 2022).

The regime, however, was designed for linear television, and consumption has moved beyond it. The Council of the European Union has expressed concern that events of major importance are no longer consumed only through linear audiovisual media services and that other service types must be taken into consideration (Council of the European Union, 2025). The European Parliament has both insisted that major events remain accessible to as many people as possible in free-to-air broadcasts and criticised certain national implementations as disproportionate in relation to the volume of events covered and their fitness for a landscape defined by online availability (European Parliament, 2023). The European Board for Media Services has fed similar analysis into the Commission's evaluation (European Board for Media Services, 2025). With the AVMSD's ex-post evaluation due by 19 December 2026, the central questions are now which services should qualify as free television in a streaming environment, whether must-offer or prominence obligations should accompany listing, and how universality can be preserved when the exclusive rights holder may be a global platform rather than a national broadcaster (de la Vega, 2025).

6. The Technological Transformation of Live Sports Coverage

While markets and institutions were being reorganised, the production apparatus of live sport underwent a revolution of its own, and the Olympic Games have served as its showcase. At Paris 2024, Olympic Broadcasting Services and Alibaba Cloud launched OBS Cloud 3.0, and for the first time in Olympic history the delivery of live signals over the cloud became the main method of remote distribution to rights-holding broadcasters, superseding the satellite model in use since Tokyo 1964. Two-thirds of booked remote services across fifty-four broadcasters ran over OBS Live Cloud, carrying 379 video feeds, eleven of them in ultra-high definition, and one hundred audio feeds, while the Content+ platform hosted a record of more than eleven thousand hours of content, fifteen percent more than Tokyo 2020, delivered for the first time in UHD and in formats compatible with vertical mobile screens (Alibaba Cloud, 2024). Tokyo 2020 had already been the first Games broadcast via the cloud; Paris completed the shift, and did so with a substantially smaller physical broadcast footprint, aligning production economics with the sustainability pressures documented for the Olympic model as a whole (Alibaba Cloud, 2024; Müller et al., 2021).

Artificial intelligence now runs through the entire coverage chain. General overviews of artificial intelligence and machine learning in sport distinguish applications in performance analysis, officiating, media production and audience analytics (Chmait & Westerbeek, 2021). In Olympic production, AI-enhanced multi-camera replay systems deployed at fourteen venues across twenty-one sports converted live footage into three-dimensional reconstructions rendered in seconds and inserted into the world feed (Alibaba Cloud, 2024).

Beyond the flagship event, machine-generated highlights, automated metadata, speech-to-text localisation and algorithmic clip selection are lowering the cost floor of coverage, which makes long-tail sports and lower divisions broadcastable for the first time and multiplies the volume of platform-ready short-form content.

Technology has also entered the field of play in ways that reshape the broadcast spectacle itself. The video assistant referee, introduced into elite football with the explicit aim of improving decision accuracy, measurably changes refereeing behaviour and outcomes (Spitz et al., 2021), and every reviewed decision doubles as broadcast content: replay-driven adjudication extends dramatic time, structures commentary and feeds an enormous secondary discourse of reaction clips and disputes across social platforms. The boundary between officiating technology and television technology has effectively dissolved.

Image quality has continued its own escalation. Ultra-high definition and high dynamic range have moved from experimental showcases to standard components of top-tier event production, with Paris 2024 delivering UHD feeds through cloud distribution for the first time (Alibaba Cloud, 2024), and the premium look of the mega event now cascades downward as equipment costs fall. For broadcasters, quality inflation is double-edged: it differentiates the live event from the surrounding abundance of user-generated video and justifies premium pricing, but it also raises the production baseline that every rights cycle must fund. The historical pattern identified by Turner (2007), in which sport serves as the demonstration content for each new domestic technology, from colour television to high definition, is thus repeating itself with UHD, immersive audio and, prospectively, spatial video.

On the consumption side, the defining shifts are multiplication and personalisation. Viewing is distributed across the main screen, companion applications, social feeds and messaging, and younger Europeans in particular favour on-demand, digital-first and highlights-first engagement over full-match broadcasts (European Commission, 2025a). Immersive technologies remain incipient but real: around eleven percent of European respondents report having used virtual or augmented reality to watch sport (European Commission, 2025b), and the pandemic-era virtualisation of events such as professional cycling races demonstrated that fully simulated competition, blending elite sport with esports logics, can sustain broadcast audiences under extreme constraints (Westmattelmann et al., 2021).

Data has become the connective tissue between production and consumption. Real-time performance statistics, win-probability graphics and betting-adjacent information are woven into world feeds and companion applications, while machine learning drives the personalisation of highlights, notifications and recommendations with which platforms hold fragmented audiences between live sessions (Chmait & Westerbeek, 2021; European Commission, 2025a). At the other end of the value chain, automated camera systems and template-based cloud galleries have made it economically feasible to cover lower divisions, youth competitions and regional sport with minimal crews, expanding the definition of broadcastable sport far beyond what the satellite truck era permitted. The compression of the media-sport-consumer relationship that theorists identify at the elite level (Stavros et al., 2022) is thus being replicated, at far lower cost, across the entire pyramid of sport.

Finally, coverage itself is becoming platform-native rather than merely platform-distributed. The International Olympic Committee's long-running YouTube ecosystem exemplifies how a mega event now maintains a continuous digital footprint between editions (Lee Ludvigsen & Petersen-Wagner, 2023), and the Paralympic movement has used the same platform for alternative content creation that engages audiences largely ignored by traditional schedules (Petersen-Wagner & Lee Ludvigsen, 2023b). FIFA's preferred platform agreement with YouTube for the 2026 World Cup institutionalises shorts, extended highlights, behind-the-scenes material and partial live streaming as official components of the coverage architecture (FIFA, 2026), while Twitch watchalongs and influencer co-commentary layer a parasocial conversation over the broadcast feed (de la Vega, 2025). The direction of travel matches the theoretical prediction of a radically compressed, engagement-centred relation between media, sport and consumer (Stavros et al., 2022): live coverage is no longer a single programme but a coordinated portfolio of synchronous and asynchronous experiences.

7. The Future of Live Sports Coverage

Extrapolating from the trajectories documented above, five developments appear most likely to define the coming decade. The first is the normalisation of hybrid rights architectures. The unbundling of windows and the rise of semi-exclusivity that Turner (2007) anticipated are now the default grammar of the market, and the joint award of European Olympic rights to a public broadcasting union and a global media company (International Olympic Committee, 2023) offers a template that other event owners are likely to imitate: free-to-air breadth for the moments of maximal social resonance, combined with paid streaming depth for the completists. Co-exclusive splits of this kind reconcile revenue maximisation with the reach on which sponsorship value and political goodwill depend.

The second development is a contest between fragmentation and re-bundling. Subscription stacking has visible limits in household budgets, and the economic history of television suggests that aggregation eventually reasserts itself in new forms (Lotz, 2022). The platform giants are positioned to be the re-bundlers: Amazon already couples sports rights with a marketplace and an advertising business and leads global rights expenditure (Clover, 2026), Apple attaches premium properties to a device and services ecosystem (Apple, 2025), and Netflix demonstrates that selective eventisation can deliver the benefits of sport without full-season cost exposure (VideoWeek, 2025). The open question is whether re-bundling occurs inside proprietary ecosystems, with attendant gatekeeping risks, or through neutral aggregation that preserves consumer choice.

Closely tied to re-bundling is the reconstruction of measurement and advertising. The value of a mega event was historically expressed in a single overnight rating; it is now dispersed across broadcast reach, streaming minutes, short-form views, social impressions and creator audiences that no common currency yet aggregates. Advertisers and rights owners are experimenting with dynamic ad insertion, addressable formats and engagement-based pricing on live streams (VideoWeek, 2025), while econometric evidence that a small share of fixtures drives a large share of audience value (Buraimo et al., 2022) pushes buyers toward precisely the eventised portfolios that platforms prefer (Lotz, 2022). Whoever solves cross-platform measurement will, to a considerable degree, set the prices of the next rights cycle.

The third development is disintermediation. Federations and leagues increasingly behave as media organisations in their own right, operating direct-to-consumer services, managing platform channels as complementors (Petersen-Wagner & Lee Ludvigsen, 2023a) and concluding platform alliances that bypass traditional broadcasters, as FIFA's YouTube agreement illustrates (FIFA, 2026). At the same time, individual creators are becoming rights holders themselves (Harris, 2025). Both movements erode the historical monopoly of the broadcaster over live sport, but they also raise unresolved questions of editorial standards, journalistic scrutiny of sport governance, audience measurement and advertising accountability in environments never designed for them.

Disintermediation also sharpens two chronic vulnerabilities. The first is piracy: every additional paywall and territorial split increases the incentive to seek illegal streams, and the industrial scale of live-sport piracy now shadows every rights negotiation (Lotz, 2021). The second concerns the integrity of information: as coverage disperses across official feeds, creator channels and algorithmic clips, the capacity of professional sports journalism to scrutinise governing bodies, finances and abuses weakens at exactly the moment when sport's political and economic entanglements are deepening (Chadwick, 2022; Rojas-Torrijos & Ramon, 2021). A future in which every federation is its own broadcaster is also a future in which independent reporting on federations must find new institutional homes.

The fourth development concerns the growth frontiers of the rights economy. Women's sport is the clearest case: after decades of documented invisibility (Cooky et al., 2021), escalating deals such as Netflix's acquisition of the FIFA Women's World Cups of 2027 and 2031 (Satin, 2026) and the regulatory listing of women's competitions (European Commission, 2024) signal a durable revaluation. Paralympic and adaptive sport show parallel digital momentum (Petersen-Wagner & Lee Ludvigsen, 2023b; Ramon & Rojas-Torrijos, 2023). Geographically, the geopolitical economy of sport ensures that new state-linked investors and new host regions will keep reshaping demand (Chadwick, 2022). Cutting across all of these, sustainability constraints on hosting and production (Müller et al., 2021) will continue to favour remote, cloud-based and AI-assisted workflows of the kind piloted at Paris 2024 (Alibaba Cloud, 2024).

The fifth development is regulatory. The AVMSD evaluation due in 2026 will determine whether the listed events regime is extended to grasp non-linear reality: which streaming services count as free television, whether adequate-reach thresholds should qualify platforms as protected outlets, and whether prominence and must-offer duties should attach to events of major importance (Council of the European Union, 2025; de la Vega, 2025). Behind the technical questions lies a cultural one. Personalised, on-demand ecosystems optimise for individual engagement, yet the constitutive value of the mega event is precisely its simultaneity, the guarantee that an entire society watches the same thing at the same time (Wenner, 2022). If the compressed engagement regime of contemporary media sport (Stavros et al., 2022) is not to dissolve that shared ritual entirely, the preservation of universally accessible live moments will have to be engineered, by contract, by regulation, or by both. The most plausible synthesis is therefore a future that is commercially platform-led but culturally anchored: global platforms supply the capital, the technology and the depth of coverage, while public broadcasters and the law guarantee the campfire.

8. Conclusion

This paper has traced the reorganisation of television coverage of mega-sporting events along three dimensions. In the market dimension, the digital era predicted by Turner (2007) has matured into a platform era in which technology companies rank among the largest rights buyers, European football is carved up among streamers and telecommunications operators, and a creator economy of watchalongs and co-commentary grows on top of the official feed. In the institutional dimension, public service media have lost their monopoly but not their function: through partnership models such as the joint European Olympic rights arrangement, through their documented commitment to underrepresented sport, and through the listed events regime, they remain the guarantors of the universality that gives mega events their social meaning. In the technological dimension, cloud production, artificial intelligence and ultra-high-definition formats have transformed how live sport is made, while platform-native formats and immersive experiments are transforming how it is watched. Each dimension conditions the others: platform capital funds the technological frontier, technology lowers the cost of universality, and regulation determines whether ultimately serves the public.

The central conclusion is that television has been redefined rather than replaced. The mega event still performs the function it acquired in the broadcast century, assembling societies in real time around a shared spectacle, but it now does so through an ecology of screens, services and formats in which no single institution controls the experience. That ecology is productive, and it has demonstrably widened coverage of women's sport, Paralympic sport and long-tail disciplines. It is also fragile. Universality is no longer the by-product of spectrum scarcity; it must be actively constructed through hybrid rights architectures, through the continued vitality of public service media, and through a modernised legal framework, which makes the forthcoming revision of the Audiovisual Media Services Directive the single most consequential regulatory decision facing European mediasport (de la Vega, 2025). For practitioners, the same conclusion translates into concrete tasks: event owners must design rights architectures that price depth without extinguishing breadth; platforms must accept that the legitimacy of their sports business depends on visible contributions to universally shared moments; and public broadcasters must treat platform-native distribution not as a threat to their identity but as the contemporary form of their oldest obligation, which is to be present wherever the whole public is.

A research agenda follows directly. Scholars need cross-platform measurement frameworks capable of capturing mega-event audiences that are dispersed across broadcasts, streams, shorts and creator channels; empirical work on the equity effects of subscription fragmentation, that is, on the rising price of full fandom; environmental accounting that compares cloud-based streaming with conventional broadcast infrastructures; governance research on creator-held rights and platform accountability; and longitudinal studies of whether the compressed, engagement-driven relation between media, sport and consumers (Stavros et al., 2022) strengthens or erodes the collective experience that made sport television's most valuable content in the first place. The stadium of the digital era is the network itself. Whether it remains a public square or becomes a gated arena is the question the next decade of coverage, commerce and regulation will decide.

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