



# Possible introduction of a PPV option for the Bundesliga and WTP Factors

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## **Abstract**

**Title:** Possible introduction of a PPV option for the Bundesliga and WTP Factors

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This thesis investigates the viability of introducing a pay-per-view (PPV) model as an alternative to subscription-based streaming in the German Bundesliga broadcasting market. Although subscription models currently dominate distribution, rising prices, increasing market fragmentation, and growing consumer dissatisfaction have intensified demand for more flexible access models. Drawing on qualitative interviews with fans and industry stakeholders, the study explores willingness to pay (WTP), behavioural motivations, and risks associated with PPV adoption.

The findings indicate that WTP is shaped by strong fan loyalty to specific clubs, the significance of season stages (e.g., opening fixtures, relegation battles, European qualification), streaming quality, exclusivity, and the cultural relevance of derby matches. Competitive balance and outcome uncertainty further enhance PPV appeal, whereas the presence of star players exerts only limited influence. Club identification and cultural attachment emerge as the most decisive demand drivers.

Interviewees expressed a preference for flexible, user-oriented models, including PPV access, single-club subscriptions, day passes for conference formats, and customizable multi-game packages. Frictionless purchasing processes and fast digital payment methods were emphasized as critical to adoption, underscoring the importance of technical simplicity and consumer-oriented design.

However, the analysis also identifies significant risks. Concerns include potential cannibalization of subscriptions, risks of price discrimination, persistent illegal streaming, and structural as well as regulatory barriers (e.g., central marketing rules, contractual restrictions). In conclusion, PPV could serve as a valuable complement to existing subscriptions, particularly in attracting casual fans and addressing demands for flexibility, but it is unlikely to replace subscription models under current market conditions.

**Keywords:** Bundesliga, Pay-Per-View (PPV), Broadcasting Market, Willingness to Pay (WTP), Streaming, Subscription Models, Illegal Streaming, Consumer Behavior

## **Resumo**

**Título:** Possível introdução de uma opção PPV para a Bundesliga e fatores de disposição a pagar (WTP)

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Esta dissertação analisa a viabilidade de um modelo de pay-per-view (PPV) como alternativa ao streaming por assinatura no mercado de transmissão da Bundesliga. Apesar do predomínio das assinaturas, o aumento de preços, a fragmentação do mercado e a insatisfação dos consumidores têm impulsionado a procura por formatos mais flexíveis. O estudo baseia-se em entrevistas qualitativas com adeptos e representantes da indústria, explorando a disposição a pagar (WTP), motivações e riscos associados ao PPV.

Os resultados mostram que a WTP é influenciada pela lealdade aos clubes, pela relevância de fases da temporada (estreias, lutas contra o rebaixamento, qualificações europeias) e pelo valor cultural dos clássicos, enquanto a presença de estrelas tem impacto reduzido. O interesse aumenta com equilíbrio competitivo e incerteza dos resultados. A ligação cultural e emocional ao clube é o principal motor da procura.

Os entrevistados expressaram preferência por modelos flexíveis, como PPV, assinaturas de clube único, passes diários ou pacotes personalizados, valorizando também simplicidade técnica, interfaces intuitivas e pagamentos digitais rápidos.

Contudo, foram levantadas preocupações quanto à canibalização das assinaturas, riscos de discriminação de preços, pirataria e barreiras regulatórias ligadas à centralização da comercialização e a restrições contratuais.

Conclui-se que o PPV pode complementar, mas não substituir, o modelo de assinatura, dependendo do sucesso de estratégias de precificação, da qualidade da transmissão e da sua integração em canais já existentes.

**Palavras-chave:** Bundesliga, Pay-Per-View (PPV), Mercado de Transmissão, Disposição a Pagar (WTP), Streaming, Modelos de Assinatura, Transmissão Ilegal, Comportamento do Consumidor

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## **List of Abbreviations**

DFL: Deutsche Fussball Liga (German football league)

PPV: Pay Per View

WTP: Willingness To Pay

OTT: over-the-top

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## 1. Introduction

The German broadcasting market for first-division Bundesliga matches is currently limited to subscription-based models. To follow all matches or a single club, fans typically need at least two subscriptions, mainly Sky and DAZN, with annual costs of up to €960 (Maywurm 2025). This creates barriers for casual viewers or those interested only in specific games, who may disengage or resort to illegal alternatives, resulting in lost revenues for providers.

In contrast, PPV (pay per View) models are already well-established in other sports, particularly in combat sports such as the UFC and boxing, and football platforms are beginning to experiment with them. Amazon Prime, for example, recently introduced PPV for selected Ligue 1 matches in the UK. This thesis examines whether PPV could serve as a complementary model for the Bundesliga, addressing the needs of fans unwilling to commit to costly subscriptions but open to purchasing individual matches, particularly those involving their favourite club or high-stakes fixtures.. (Noble and Agini 22.02.2025)

The goal of this analysis is to help address three key problems:

- First to figure out the demand for PPV Bundesliga streaming options from a customer point of view and the possible interests for streaming providers to offer this option next to their already existing subscription model?
- Second, what are Potential Risks and Barriers against a PPV Bundesliga streaming model?
- Third, identifying ideal PPV prices for Bundesliga games based on which factors consumer value the most in the field of willingness to pay (WTP)?

This is particularly relevant for sports broadcasters seeking to maximize revenue while also reaching potential new customers, especially those who are currently not subscribers due to a lack of interest in expensive monthly packages, and who only want access to specific matches or a small part of the total offer. By offering an example of how targeted PPV pricing can attract this segment, this thesis intends to demonstrate a way for broadcasters to tap into unmet demand and broaden their customer base.

Understanding consumer demand is crucial given the high financial stakes of Bundesliga broadcasting rights. The DFL earns about €1.1 billion annually from rights sales, mainly to Sky and DAZN. With such large investments, broadcasters face strong pressure to maximize returns,

making flexible models a potential way to generate extra revenue and attract new audience segments beyond the subscription-only system. (Nwagner 2024).

This study aims to contribute to the academic and practical discourse on sports media consumption by integrating perspectives from consumer behavior theory, sports economics, and pricing psychology. Relying on qualitative interviews, it explores the perceptions of German football fans, both current subscribers to streaming platforms and non-subscribers, to assess audience interest in PPV models and the potential risk of cannibalizing existing subscription services. In addition to fan perspectives, the study incorporates expert interviews from the sports streaming industry to gain insights into the strategic and operational considerations of implementing PPV. Although the research focuses on the Bundesliga, the findings are likely transferable to other European football leagues due to comparable market structures and viewer behavior patterns.

Finally, the study includes a discussion of possible limitations and challenges that could hinder the successful implementation of PPV in professional football, such as legal barriers, consumer resistance, or the potential cannibalization of existing subscription revenues.

## **2. Market Context and Industry Developments**

This chapter examines the Bundesliga's broadcasting rights, revenue and audience figures, and the broader market landscape. It further analyses the transition from traditional cable television to digital streaming, focusing on recent developments and the key factors driving success in the streaming sector.

### **2.1 Broadcasting Landscape**

In Germany, the Bundesliga's broadcasting rights follow a central marketing approach managed by the German Football League (DFL), which sells broadcasting rights using a monopolistic offering model. Revenues from these sales are distributed to individual clubs through a predefined formula, which enables the DFL to negotiate with a small number of financially capable rights agencies (Bieling et al. 2004) Due to the high costs associated with broadcasting rights, providers who purchase them from the DFL often need to rely on a pay-TV model. Revenue generated solely through advertising would likely be insufficient to cover these expenses, making it financially unfeasible to rely on advertising alone to offset the cost of broadcast rights (Mondello and Fortunato 2022).

In Germany, fans currently need at least two subscriptions (e.g., DAZN and Sky or DAZN and WOW) to watch all Bundesliga matches. No provider offers single-match purchases, requiring at least a monthly subscription. The minimum annual cost amounts to about €960, although Sky offers new customers a limited bundle with DAZN for €49.99 per month (€600 per year). This structure restricts flexibility for consumers seeking more tailored viewing options. (Maywurm 2025).

DAZN has recently piloted a PPV model, though initially limited to select games from France's Ligue 1 and Italy's Serie A, with costs per game ranging from €3.49 to €4.99. (Kochinsky 2023). Until 2021, Sky offered a service called Sky Ticket, which allowed customers to purchase a daily pass for Sky's sports programming. This was the closest option they provided to a pay-per-game model; however, this option has since been discontinued (Beyer 2022).

## **2.2 Broadcasting Rights Allocation**

The DFL allocates media rights for Bundesliga games every four years, with contracts covering four seasons. Presently, Sky and DAZN hold exclusive Bundesliga broadcasting rights: DAZN for Friday and Sunday matches and Sky for the complete Saturday schedule. Sky also holds exclusive mid-week matchday rights. The only exceptions to this are the Bundesliga season opener, one Bundesliga match each on the 15th and 16th matchdays, and the relegation playoff, which can all be viewed on free TV via SAT.1 (DFL and Deutsche Fußball Liga GmbH 2024; Sky 21.10.2024).

## **2.3 Revenue and Audience Numbers**

Bundesliga revenue in the 2023-24 season totalled €4.45 billion, with 34.23% from media revenue (broadcasting and streaming rights). This media revenue forms the largest component of Bundesliga income, highlighting its critical role in league finances (DFL Deutsche Fußball Liga GmbH 2024b). During the 2023-24 season, an average of 2.75 million people in Germany watched Bundesliga games on television each Saturday, according to data from Sky a new record for viewership (Kuhnert 2024). The club with the highest TV viewership in recent years has consistently been Bayern Munich, averaging 926,240 viewers in the 2023-24 season (Jörgensen 29.05.2024). The steady interest in the Bundesliga is also evident from the first Saturday of the current season, where Sky achieved a 26% of viewers market shares (Weis 2024).

## **2.4 Movement from Cable TV to Smart TV & streaming**

The shift from traditional cable TV to smart TVs and streaming platforms marks a fundamental change in sports consumption. Streaming offers on-demand access, multi-device compatibility, and higher levels of personalization, aligning closely with evolving consumer preferences (Shafer et. al. 2025). Advances in data analytics now allow providers to tailor recommendations and promotional content to individual viewing habits, such as favourite clubs, preferred times, or devices (Kumar 2025). For example, platforms can directly suggest relevant Bundesliga matches or targeted PPV offerings based on a user's behaviour and preferences.

Interactive features such as real-time statistics, customizable camera angles, and live polls further enhance engagement, especially among younger audiences (Fletcher 2023). This has contributed to a decline in cable subscriptions and a rise in "cord-cutting," particularly among digitally savvy fans who seek more flexible and modular access to content.

These developments have contributed to widespread "cord-cutting" and declining cable subscriptions. At the same time, fragmented rights and the need for multiple subscriptions have produced consumer fatigue in markets like the Bundesliga. This complexity increases demand for simpler, more flexible access models, with PPV frequently mentioned as a promising option. Overall, streaming developments reflect not only technological innovation but also growing openness to hybrid models that combine subscriptions with PPV, catering especially to casual fans seeking select content (Verwest and Muralidharan 2024).

## **2.5 Impact of streaming platforms and the availability of mobile viewing**

The rise of streaming platforms, particularly mobile-based over over-the-top (OTT) services, has significantly disrupted traditional sports broadcasting by combining the immediacy of live television with the interactivity and personalization of digital media. Live features such as in-stream chat enhance viewer flow and engagement, contributing to a deeper and more immersive experience (Ock et al. 2024). Simultaneously, mobile flexibility, on-demand access, and viewing convenience have become pivotal factors in the widespread adoption of streaming services for sports content. Successful sports streaming platforms differentiate themselves by offering a blend of mass content (e.g., major international leagues) and niche selections (e.g., smaller domestic competitions), thus appealing to both global audiences and dedicated regional fan bases (Xu et al. 2023). The increasing prevalence of multi-screen ecosystems, including second-screen usage during live matches, further enhances viewer engagement through interactive statistics, commentary, and social sharing (Yang and Peña 2025).

However, this innovation depends heavily on technical stability and high streaming quality. Even minor issues such as latency, buffering, or image degradation can lead to significant user dissatisfaction, especially during emotionally intense live sports events (Fakataulavelua et al. 2023). Therefore, a robust infrastructure is essential to support the real-time demands of modern sports broadcasting.

Together, these elements create a hybrid viewing model that preserves the linear, live essence of sports while integrating the non-linear benefits of digital platforms. This enables providers to deliver both reliability and personalization across multiple devices and usage contexts, meeting the evolving expectations of today's sports consumers

## **2.6 Reasons for Spor Broadcasting Providers to provide PPV**

The following section outlines possible reasons for broadcasting providers to consider expanding their current subscription-only model by introducing additional PPV options. These reasons can be categorized into four key aspects, the first of which is:

**New revenue streams through new audience:** A market gap exists for fans who prefer selective viewing over full subscriptions. For example, supporters who attend home matches may only want to stream away games and are unlikely to buy comprehensive packages. Offering PPV could unlock untapped revenue from this segment (Kaplan 2025). Hybrid models that combine subscriptions with PPV allow providers to reach both committed and occasional viewers, increasing flexibility, revenue, and long-term adaptability (Moore 2025).

**Data Insights and Customer Segmentation:** PPV options provide broadcasters with detailed insights into customer behaviour and willingness to pay. By analysing purchase patterns, companies can refine segmentation, personalize offers, and tailor advertising for greater relevance and engagement (Noble 2024). Such data also enables customized products, such as club-specific bundles, thereby generating revenue while opening opportunities for targeted marketing and product development.

**Reducing Churn and Enhancing Customer Retention:** PPV can reduce churn by retaining monthly subscribers who often cancel during the off-season, when the value of full packages declines. Offering access to selected matches keeps these users engaged and connected to the brand, lowering the risk of permanent loss. Rising subscription costs and bundles further increase demand for flexible, "à la carte" options aligned with actual viewing habits. Additionally, PPV serves as a low-barrier entry point for new customers: casual viewers who

start with single matches may later transition into long-term subscribers, creating a natural acquisition funnel (PricewaterhouseCoopers 2025).

### **3. Literature Review**

#### **3.1 Overview**

The literature review of this thesis is structured into four main sections:

1. The evolution of consumer behaviour in the streaming market driven by advancements in digital technology, including the growing demand for personalization, mobility, and flexible access models.
2. An examination of price elasticity of demand within the sports streaming sector, focusing on how different pricing strategies influence consumer engagement and subscription decisions.
3. The theory overview of dynamic pricing.
4. An overview of methods used to measure WTP, including the development of these methods over time and an analysis of key factors that influence WTP specifically in the context of sports and football broadcasting.

#### **3.2 Change in consumer behaviour by advanced technology in the streaming market**

Exploring PPV as an option requires an understanding of how advancing technology has transformed consumer behaviour. Studies show that companies investing in digitalization and data-driven strategies gain a clear competitive advantage (Shiwei et al. 2020). In recent years, shifts in consumer behaviour have been closely linked to the rapid advancement of technology. As access to information has grown, purchasing decisions have shifted from emotional to more rational and deliberate, with consumers increasingly critical and sceptical toward brands and marketing claims (Sahu 2024). At the same time, AI-driven personalization is enabling highly tailored content delivery, from dynamic highlights to predictive recommendations, which enhances perceived value and strengthens the case for premium add-ons such as PPV. (Shiwei et al. 2020). The streaming industry provides a parallel. In its early phase, providers like Netflix succeeded with simple flat-rate models that offered unlimited content. However, as competition

intensified and consumer choice expanded, behaviour became more selective: users increasingly prioritize platforms that deliver preferred content while rejecting unwanted bundles. This has led to the rise of differentiated pricing strategies, tiered packages based on content categories, ad presence, or account sharing, designed to match diverse consumer needs and WTP (Rafi 2019). Taken together, these developments suggest that technology has shifted consumer behaviour toward a more informed, identity-driven, and customized decision-making process. For sports broadcasting, this implies that flexible PPV options, integrated within hybrid models, can meet evolving demands while unlocking new revenue streams.

### **3.3 Price elasticity on demand**

Because of the broadcasting rights structure, the Bundesliga streaming market operates as a match-specific monopoly. Each game can only be shown by one provider, leaving no close legal substitutes. Alternatives such as illegal streams or stadium attendance are often less convenient, reliable, or affordable, and delayed access does not meet the immediacy of live viewing. Consequently, demand is largely price inelastic, with fans showing limited sensitivity to price changes (Rockerbie 2025).

Empirical evidence supports this inelasticity. Studies of televised sports show that demand remains stable even when prices vary, as fans attach unique value to live access. Research on professional sports revenues further confirms that inelastic demand is the norm, allowing monopolistic providers to maintain high pricing power without significant audience losses (Noll 2006). In such markets, moderate price increases rarely cause major viewer loss, though excessive hikes risk driving marginal fans to illegal streams. This underscores the importance of strategic pricing tools such as dynamic pricing or PPV to maximise revenue while protecting the core fan base.

### **3.4 Theory of Pricing Dynamics**

Pricing dynamics, alongside WTP, play a central role in the viability of PPV models. Dynamic pricing refers to strategies where prices fluctuate in response to demand, supply, or audience interest. Digital sports platforms are particularly well positioned to apply such models, as they can leverage customer data, artificial intelligence, and machine learning to predict optimal prices in real time. This approach enables broadcasters to tailor prices more closely to consumer segments, maximize revenue, and enhance flexibility, similar to how companies like Amazon have improved profitability through data-driven pricing (Kate Gibson 2025).

Dynamic pricing is already well established in U.S. sports ticketing, where leagues such as the NBA, NFL, and MLB adjust prices according to factors like opponent quality, match timing, and demand (Drayer et al. 2012). In European football, adoption has been slower but is emerging in tiered pricing models implemented by Premier League clubs such as Arsenal FC and Tottenham Hotspur, where ticket costs vary by opponent, competition, or matchday(Quansah et al. 2023).

In contrast, major German clubs such as FC Bayern Munich and Borussia Dortmund have historically resisted dynamic pricing, emphasizing fan loyalty and affordability. Nevertheless, research on its potential in German football, including studies on Bayern Munich, highlights growing academic and industry interest in revenue opportunities offered by more flexible pricing models(Kemper and Breuer 2016).

### **3.5 Theory about Willingness to Pay**

The concept of WTP is central to developing effective pricing strategies, as it reflects the maximum price a consumer is prepared to pay for a product or service (Werthenbroch and Skiera 2002). Accurately identifying WTP is crucial for profitability: prices set too high risk driving consumers to competitors, while prices set too low leave revenue potential untapped. To measure WTP, the literature distinguishes between hypothetical and actual contexts, as well as direct and indirect methods. (Miller et al. 2011).

Hypothetical WTP (HWTP) refers to stated valuations without real financial consequences, while real WTP (RWTP) is measured in contexts where respondents must follow through, such as auctions. HWTP often suffers from hypothetical bias, as participants may overstate or understate their true WTP when not facing actual purchase scenarios (Harrison and Rutström 2008).

Within direct hypothetical methods, the Contingent Valuation Method (CVM) is widely applied in economic research. Respondents are asked to state their WTP in a hypothetical scenario, either in an open-ended format, by accepting or rejecting predefined price points, or through a hybrid choice bracketing method that combines both. The latter helps refine WTP estimates while reducing biases linked to purely open or closed formats(Werthenbroch and Skiera 2002).

Although widely used, the Contingent Valuation Method (CVM) faces criticism for hypothetical bias, as stated WTP in surveys often diverges from real behaviour due to the absence of financial consequences. CVM is also prone to strategic misrepresentation, with

respondents understating or overstating WTP to influence outcomes, reducing the accuracy and reliability of results (Hofstetter et al. 2020).

Among direct actual WTP methods, the Becker-DeGroot-Marschak (BDM) mechanism is widely used. Participants state their maximum WTP, after which a random price is drawn: if their WTP meets or exceeds this price, they purchase at the drawn price; otherwise, no transaction occurs. Since participants may have to buy the product, the method incentivizes truthful reporting (Becker et al. 1964).

Another approach to determine actual WTP is the Vickrey auction. This is a sealed-bid auction in which each participant submits a confidential bid. The highest bidder wins the item but only pays the amount of the second-highest bid. This auction format is considered incentive compatible, as it gives participants a strong reason to bid their true WTP. Overbidding does not improve their outcome and may lead to paying more than necessary, while underbidding increases the risk of losing a product they value (William 1961).

Within indirect hypothetical WTP approaches, Choice-Based Conjoint (CBC) analysis is one of the most widely used methods. Instead of asking directly about prices, participants are presented with product profiles that vary in attributes and associated costs. In the case of football streaming, these attributes might include video quality, replay availability, or additional camera angles. By repeatedly choosing between alternatives or rejecting them, researchers can derive estimates of WTP for individual features and measure consumers' price sensitivity (Kohli and Mahajan 1991).

The Incentive-Choice-Based Conjoint (ICBC) method is an indirect actual WTP approach that combines elements of CBC and the Becker-DeGroot-Marschak (BDM) mechanism. Participants make choices across several product sets, but one choice is randomly selected and made binding, requiring an actual purchase. This incentive alignment encourages truthful preferences and improves the validity of WTP data (Ding 2007).

Where possible, literature recommends using actual WTP scenarios or experimental methods that involve real purchasing opportunities. This is because consumers face real economic consequences, which leads to more accurate and less biased estimates of WTP reducing both understatements and overstatements (Wertenbroch and Skiera 2002). Nonetheless, several studies have shown that hypothetical methods can still be used to estimate demand and pricing curves that closely approximate real-world data, thereby producing usable and informative results for practical applications (Miller et al. 2011).

The self-explicated method is a well-established technique for identifying which product features consumers value most, particularly in contexts such as digital products or subscription services where offerings involve many attributes. Unlike traditional conjoint analysis, which requires respondents to evaluate complete product profiles and infers utilities indirectly, the self-explicated method follows a compositional approach. Respondents first rate the desirability of each attribute level individually and then distribute a fixed number of points (e.g., 100) across attributes to indicate their relative importance. For example, a respondent might allocate 40 points to “importance of the game,” 25 to “match timing,” and 15 to “presence of star players.” The total utility of a configuration is then derived by multiplying level ratings with attribute importance weights. This structure is cognitively manageable, efficient to compute, and particularly suited to high-dimensional settings where conjoint analysis becomes burdensome.(Srinivasan and Park 1997; Hauser and Rao 2004). The self-explicated approach avoids this problem by asking respondents to evaluate attributes in isolation rather than in combination, resulting in more efficient data collection for complex products.

However, the method also faces limitations. Since it does not align incentives, respondents may overstate or understate preferences, resulting in hypothetical bias and reduced accuracy. Moreover, because attributes are evaluated in isolation, interactions between features or nonlinear valuation patterns often remain undetected (Ding 2007).

To address these issues, Park, Ding, and Rao (2008) introduced a web-based upgrading method that combines the simplicity of self-explication with incentive alignment through the BDM mechanism. In this approach, respondents begin with a base product configuration and state their WTP for incremental upgrades. A random price is then drawn: if their WTP equals or exceeds it, the upgrade is implemented; otherwise, the base configuration remains. This procedure mirrors real-world customization decisions and yields more accurate and predictive results, as shown in empirical studies on digital cameras. While the upgrading method offers important improvements, it requires real or simulated purchasing contexts, which are not always feasible. In the context of this thesis, the self-explicated approach remains a practical and academically defensible method, but the upgrading framework highlights promising avenues for future research.(Park et al. 2008).

## **3.6 Factors Influencing Willingness to Pay in the context of PPV and sport events**

The following section identifies factors influencing customers' WTP for Bundesliga matches, drawing on literature from other sports and leagues but focusing on those applicable to the German market. A interview-based approach is used to assess which factors are most relevant to the target audience and how strongly they shape viewer preferences.

### **3.6.1 Seasonality and Timing Factors**

Literature suggests that several timing factors significantly impact audience size and viewership rates. Studies from Denmark and Norway highlight that seasonality influences viewing patterns, with winter generating the highest viewership, followed by autumn and spring, while summer consistently attracts the lowest numbers. Further, viewership tends to peak on Fridays, Saturdays, and Sundays, particularly between 20:00 and 23:00 (Johnsen and Solvoll 2007) The timing of a match day was also identified as a relevant factor in a study on the Premier League, where audience numbers on weekends were significantly higher compared to weekdays, with an observed difference ranging between 7.6 and 8.2 percent. (Downward et al. 2019)

### **3.6.2 Player Factors**

One significant factor highlighted in the literature that impacts audience interest in various sports is the "Star Player Effect." This effect refers to the tendency of viewers and customers to show greater interest in sporting events featuring a few highly important and famous athletes. Evidence of this effect can be seen in MLS, where games with David Beckham in the lineup showed a notable increase in ticket sales for those specific matches (Lawson et al. 2008; Buraimo 2005). Similarly, local players tend to draw more audience engagement, defined as athletes either originating from the club's region or those with long-standing club connections, such as through youth development programs (Buraimo 2005).

### **3.6.3 Season Progress Factors**

The timing of a football match within the league season has a significant influence on fans' WTP, particularly for a PPV Model. Multiple studies across European football leagues indicate that matches taking place toward the end of the season often generate higher demand and perceived value, which directly correlates with increased WTP. Toward the season's end, the stakes for many teams become more defined and emotionally charged. Matches can decide league titles, qualification for international competitions (e.g., Champions League, Europa

League), or relegation battles. For fans whose teams are involved in these scenarios, these games carry substantial emotional and sporting value, which increases their perceived importance and thus their WTP (Johnsen and Solvoll 2007). A study on English Premier League viewership confirmed that matches with “decisive outcomes”, such as promotion or relegation, attract significantly more viewers and engagement (Downward et al. 2019). This trend is consistent with the Uncertainty of Outcome Hypothesis which suggests that fans are more attracted to matches where the result is unpredictable and consequential. As the season progresses and more is at stake, the uncertainty and emotional investment increases, making these games more valuable in the eyes of viewers. Further evidence from consumer behaviour research shows that contextual factors such as timing, perceived importance, and outcome relevance are strong predictors of WTP. For instance, (Buraimo 2005) found that the presence of critical consequences (e.g., a team’s chance to qualify for Europe or avoid relegation) significantly raised both TV ratings and fans reported WTP. In such cases, viewers may be more willing to pay a premium for access to these high-stakes events, compared to mid-season matches with limited relevance or predictable outcomes. (Andreff and Szymanski 2005)

### **3.6.4 Sport Performance Factors**

Team performance is a central determinant of viewership. Successful clubs, measured by recent results, league standing, or historical achievements, attract significantly larger audiences, with top teams such as Real Madrid or FC Barcelona consistently drawing high ratings. Performance history, particularly trophy wins, further strengthens long-term fan interest. (Pérez et al. 2015).

Sporting performance can also be assessed through relative wages. Evidence from the English Premier League shows that a ten percent increase in average relative wages corresponds to a three percent rise in audience ratings. However, the same study highlights the negative impact of large disparities in team strength, such as differences in player age or experience (Downward et al. 2019).

Closely tied to performance is the concept of competitive balance. Audience engagement rises when match outcomes are uncertain, and this unpredictability can be measured through league ranking differentials: the smaller the gap, the higher the perceived competitiveness and the greater the viewership (Borland 2003) .

### **3.6.5 Geographical cultural factors and fan loyalty**

Literature shows that beyond club performance; geographical and cultural factors strongly influence fan interest and viewership. Clubs from larger cities often benefit from broader local

fan bases, while long-standing traditions and histories strengthen cultural attachment and audience size. (Gómez-Bantel 2016). Regional identification plays a key role, as fans are more engaged when they perceive the club as a symbol of local pride. Rivalries within the same region, particularly derbies such as FC Bayern München versus Borussia Dortmund, further intensify interest and drive higher WTP (Johnsen and Solvoll 2007).

Closely linked to regional affiliation is the concept of fan identity and loyalty signalling. Psychological studies show that strong team identification is a decisive factor WTP across sports contexts. Supporters often regard paying for a PPV stream not merely as a purchase but as an expression of loyalty and belonging. Social Identity Theory suggests that individuals derive self-esteem from group membership, and in sports this translates into financial support independent of performance outcomes (Bharati and Sahoo 2022). For highly identified fans, official access to matches represents symbolic consumption, reinforcing identity and commitment, which significantly increases WTP, especially for emotionally charged or high-profile games.

### **3.6.6 Content quality and Exclusivity**

The quality and exclusivity of content provided by sports TV providers significantly influence viewership and WTP. Exclusive broadcasting rights, particularly live broadcasts, are crucial for attracting viewers (Ha and Chan-Olmsted 2004). Live viewing is highly valued by audiences, who are often willing to pay a premium for it (Statista 2018).

### **3.6.7 Illegal Streaming**

Illegal online streaming is a major challenge in sports broadcasting, especially as the availability of digital streaming grows. Illegal streaming options undermine pay-TV providers by diverting potential paying customers, presenting a significant financial risk. Data from Statista indicate that in 2022, 61% of illegal stream users in Germany accessed these streams specifically to watch football, underscoring the impact of illegal streaming on WTP and pay-tv revenue (Harms 2024). One way to reduce the use of illegal streaming could be for sports TV providers to offer more flexible options without long-term contracts. For some users of illegal sports streams, a key reason is the lack of flexibility in the current streaming options available on the market. (Lotz 2017).

### **3.6.8 Flow Experience and Impulse to Purchase in Live Contexts**

In live sports streaming, the psychological state of flow, defined by immersion, engagement, and enjoyment, plays an important role in shaping consumer behaviour and willingness to pay. The Stimulus-Organism-Response model suggests that high-flow experiences increase the likelihood of spontaneous purchases, as emotional involvement can reduce rational price resistance. This effect is particularly relevant in football, where the time-sensitive excitement of live matches creates strong emotional momentum. Research on livestream commerce shows that interactive features such as polls, chats, and real-time reactions significantly raise purchase likelihood, especially when supported by an intuitive interface (Liu et al. 2025). For PPV models in football, integrating such interactive elements not only enriches the viewing experience but also fosters moments of urgency that drive immediate payment decisions. Research on dynamic ticket pricing in football further demonstrates the influence of purchase timing on consumer behaviour, with prices varying according to demand fluctuations (Kemper and Breuer 2016). This finding suggests that timing could also affect WTP for PPV Bundesliga matches, highlighting opportunities for more dynamic and adaptive pricing strategies.

## **4. Methodology**

### **4.1 Research Design and Data Collection**

Literature highlights that quantitative and qualitative research represent two distinct paradigms, each rooted in different theoretical orientations, methodological traditions, epistemological perspectives, and research practices. Quantitative approaches emphasize generalizability and predictive accuracy, whereas qualitative research seeks to capture in-depth insights into people's experiences and the meanings they attribute to them. Although the boundaries between the two are sometimes blurred, their distinction is often maintained due to the appeal of simple binary classifications (Creswell 2014).

In addressing the research gaps identified in the literature review, this study employs a qualitative research design, which is particularly well suited to exploring perceptions and attitudes toward a potential PPV model in the German Bundesliga streaming market. Given the limited body of academic work in this domain, qualitative methods offer the opportunity to uncover new insights by capturing perspectives that may not be adequately reflected in existing literature. Semi-structured interviews were therefore conducted with three key stakeholder

groups: prospective PPV customers, current subscription holders, and industry experts from the sports broadcasting sector.

This design enables an open-ended examination of viewing behaviors, WTP, the potential risks of subscription cannibalization, and broader strategic considerations linked to the introduction of PPV. By integrating viewpoints from both the demand and supply side, the study seeks to provide a comprehensive and nuanced understanding of the opportunities and challenges associated with implementing PPV in the Bundesliga broadcasting landscape.

Within the WTP analysis, prospective PPV customers were additionally asked to quantify and rank influencing factors using a 100-point allocation task. This exercise, inspired by the WTP measurement approach of Srinivasan and Park, offers deeper numerical insights into how participants prioritise different drivers of their payment decisions (Srinivasan and Park 1997).

For data collection, interviews were selected as the primary method. Qualitative research comprises a variety of techniques designed to yield in-depth insights, but interviews are particularly well-suited when the objective is to understand complex social and behavioral phenomena. They allow for rich contextual detail and nuanced comprehension of stakeholder viewpoints on evolving topics such as new broadcasting models in professional football. Moreover, interviews offer the flexibility to explore participants' attitudes, motivations, and expectations in ways that are not readily captured through purely quantitative methods (Gill et al. 2008).

The choice of interview format depends largely on the research objectives. Literature distinguishes among structured, semi-structured, and unstructured interviews. Structured interviews, while standardized, restrict the exploration of emerging themes. In contrast, unstructured interviews offer deep insights through open-ended questioning but risk inefficiency and potential bias. Semi-structured interviews strike a balance by providing a guiding framework of core questions while maintaining the flexibility to probe further or adapt the direction of inquiry in response to participants' answers (Misoch 2015). This balance makes them particularly suitable for the present study, which requires both comparability across respondents and the ability to explore new perspectives as they arise.

## **4.2 Sample**

The primary objective of this study is to examine whether offering a PPV option alongside existing monthly or annual subscription models can enable sports broadcasting providers to attract new customer segments and generate additional revenue in the German Bundesliga

streaming market. A central focus is placed on understanding consumers' WTP for individual matches, as this serves as the foundation for developing a viable and differentiated pricing strategy. Specifically, the study aims to identify and evaluate the key factors that influence dynamic PPV pricing decisions, with the goal of determining how match characteristics, consumer preferences, and contextual variables affect viewers' price sensitivity and perceived. The focus regarding the non-expert group is on young males, as this represents the primary target audience of Bundesliga fans where 96% of the Bundesliga fans are male according to a Fans Analysis Report (Schmidt et. all 2018). To ensure anonymity, the names and companies of the interviewees have been anonymous.

To address these objectives, the analysis is structured in three parts.

1. **Possible customer group interviews:** This part explores factors influencing WTP beyond those identified in the literature. Interviews with potential consumers examined viewing habits, engagement with the Bundesliga streaming market, and perceptions of match-specific WTP, aiming to uncover new variables and validate existing research (Appendix D: Table 1).
2. **Current subscription owners:** The second part analyses subscribers' viewing habits and attitudes toward PPV, focusing on the risk of cannibalization and the conditions under which a shift from subscriptions to PPV might occur (Appendix D: Table 2).
3. **Industry experts:** The third part presents expert perspectives on PPV, addressing risks, barriers, opportunities, and target groups, thereby complementing consumer-oriented insights with a professional market view (Appendix D: Table 3).

Interviewees were recruited via LinkedIn, company websites, and personal networks, and contacted through LinkedIn, email, or text message. All interviews were conducted individually in person, via Microsoft Teams, or phone, lasting between 7 and 37 minutes. Participants were informed about the study's purpose, voluntary nature, and data handling in accordance with ethical standards, with explicit consent obtained for recording and transcription. Recordings were made on a mobile device and transcribed using Microsoft Teams and the Whisper tool to ensure accuracy. To reduce language barriers, interviews were held in German and later translated into English with DeepL. Personal identifiers were removed to guarantee anonymity and confidentiality. A total transcript of each interview can be find under the following link: [Interviews David Master thesis](#))

### 4.3 Analysis Method

To ensure a systematic analysis, the interviews were examined using Mayring's content analysis. This approach requires defining a clear direction of analysis to develop categories that capture and structure the central dimensions of the research questions. Following Mayring's procedure, the interview transcripts were first paraphrased to filter out non-essential elements before being abstracted into higher-level formulations. Redundant paraphrases were then eliminated, and similar statements were grouped together to consolidate related meanings. This stepwise process facilitated the gradual refinement of categories in direct alignment with the study's central objectives. For example, statements such as *"If only 30% of subscribers drop out for PPV, the rights deal could already be underwater"* (C7) were identified, paraphrased, and classified for further analysis.

A key principle of Mayring's method is the definition of clear units of analysis to ensure systematic coding. In this study, extended statements were chosen as the units of analysis to enable an in-depth and exploratory examination of the transcripts. The analytical process involved coding, categorizing, and interpreting. For instance, when participants noted *"If a subscriber switches to PPV, we lose recurring revenue, that's the biggest danger"* (C3), the statement was coded under "Risk of PPV" and further classified within the subcode "Cannibalization risk." This structured category system allowed for a nuanced understanding of both the context and frequency of recurring themes in the data. In accordance with Mayring's guidelines, the categories were carefully reviewed to ensure consistency with existing theories and relevance to the research questions. Based on this process, the following main categories emerged: Risks and Barriers of PPV, WTP Factors, Perspectives on the Current Situation, Possible Implementation, Opportunities of PPV.

For interpretation, the codes and subcodes were analysed in relation to the research questions to uncover demand for a PPV option, perceived risks, and influencing factors for WTP and dynamic pricing. Finally, consistent with Mayring's quality standards, the content analysis was evaluated against criteria of transparency, credibility, and reliability (Mayring 1991).

## **5. Results and Analysis**

### **5.1 Overview**

The following chapter presents the analysis and findings derived from the interview's derivative into each group of interviewees.

### **5.2 View of potential target group**

This first section focuses on a potential target group: individuals who are interested in the Bundesliga but do not currently hold a broadcasting subscription. The aim is to explore their reasons for not subscribing, their possible use of illegal streaming, and the factors that could influence their WTP for a potential PPV model.

#### **5.2.1 PPV reasoning interest and problems with current subscription model**

One of the main concerns expressed by interview participants was the current pricing structure of the Bundesliga broadcasting market. A key issue mentioned by nearly all respondents was the need to subscribe to multiple providers just to follow all games of their favourite club. This fragmented setup was perceived as unnecessarily complex and financially burdensome. As one participant put it, *"It is ridiculous that I need multiple subscriptions when all I want is Bundesliga"* (A1). Another echoed this frustration, stating, *"The fragmentation kills the fan experience. It should be much simpler"* (A6).

Several interviewees also pointed out that monthly subscription plans are significantly more expensive on a per-month basis than annual plans, making short-term access disproportionately costly. Many participants also felt that the current pricing model is not aligned with their personal viewing behaviour or needs. For instance, one student explained, *"For students like me, the current subscriptions are just not affordable"* (A4). Similarly, another interviewee remarked, *"They increase prices almost every season, but nothing improves"* (A8).

They considered it unfair to be forced into paying for large content bundles when they are only interested in specific matches or clubs. This mismatch between demand and pricing structure was a recurring theme throughout the interviews. Participants consistently emphasized a desire for greater flexibility, as many of them do not require full access year-round and would prefer a more tailored solution.

Additionally, many interviewees noted that their overall number of media subscriptions has increased in recent years, citing platforms such as Amazon Prime and Netflix. This increase in

subscriptions has led to greater price sensitivity and hesitation to commit to yet another full-priced sports package. The combination of limited flexibility, fragmented content access, perceived pricing unfairness, and high cumulative subscription costs has made many users more cautious and selective in their streaming choices.

### **5.2.2 Illegal streaming**

Among the 14 participants, 10 openly admitted to currently using or having used illegal streams to watch football content, including Bundesliga matches. As one put it bluntly: *“Honestly, I often use illegal streams because I don’t want to pay two subscriptions just to see my club”* (A3). Others confirmed similar experiences, with one explaining, *“It’s too fragmented and expensive, that’s why illegal streaming is so tempting”* (A7).

Interestingly, some participants even reported paying for unauthorized providers: *“I even pay €10 a month for an illegal streaming provider, it’s cheaper and shows all games in one place”* (A11). Another added, *“I got an alternative stream which is priced around €100 per year but there I got everything in one place”* (A2). These examples highlight that piracy is not exclusively a free-access phenomenon but can also function as a parallel, lower-cost subscription market.

Despite this, most participants who used alternative streaming solutions did not express full satisfaction with them. Technical shortcomings were a recurring theme: *“The streams often crash or lag, especially when many people watch at once”* (A9). Another participant recalled, *“I once had a virus on my laptop because of shady streaming sites”* (A10), while others noted the frustration of unreliable services interrupting the live match experience: *“When the stream suddenly stops in the middle of the match, it’s really frustrating”* (A1).

Importantly, however 8 out of the 10 users indicated they would consider switching to a legal PPV model if certain conditions were met. Stability and quality were emphasized as critical factors, along with fairer pricing and the possibility to pay only for the games they truly cared about. As one participant summed up: *“Many people just accept the risk of poor quality to save money, since there is no fair priced alternative”* (A7), but if legal providers manage to offer reliability, flexibility, and club-specific access, the incentive to stick with piracy could be substantially reduced.

### 5.2.3 Willingness to pay analysis

This section focuses on the factors which influences possible customers WTP, therefore the before find factors in the literature will be compared with the findings out of the interviews with possible customers.

#### Seasonality and Timing Factors:

Seasonality, as in whether a match takes place during the summer or winter, has been identified in prior literature as a potential factor influencing consumers' WTP for sports events. However, findings from the qualitative interviews conducted in this study suggest a different perspective. Only 3 out of 14 participants indicated that the season had any impact on their WTP. Several respondents explicitly stated that weather conditions or time of year were largely irrelevant to their viewing motivation, as one noted: *"Winter or summer doesn't matter if I want to see the game"* (A3), while another emphasized: *"For me the weather doesn't matter, football is football"* (A9). Among those who did recognize a seasonal influence, the primary reasoning was situational. One participant explained: *"During winter I stay home more, so I'd be more likely to buy a PPV match"* (A7). In contrast, another highlighted the social dimension of summer viewing: *"In summer I usually watch with friends outside, so I wouldn't pay for a stream"* (A11). These insights diverge from the findings of the literature review, as : (Downward et al. 2019) highlight that the season has a significant influence on WTP and interest in games since the given Literature was based on Premier League, this is where the Leagues within Europe may differ from each other.

By contrast, participants in this study emphasized match timing as a more relevant factor, which aligns with existing literature, 6 of the 14 interviewees stated that the time of the match would influence their WTP. Weekend fixtures, especially on Saturdays or Sundays, were viewed more favourably. These time slots align better with participants' personal schedules, as they are less likely to be working and can plan around the event more easily. As one participant put it: *"Sunday evening matches fit best into my schedule."* Conversely, matches held on Friday evenings were sometimes seen as problematic, as another respondent noted: *"If the game is on Friday evening, I usually can't watch because of work."* This indicates that timing, unlike seasonality, plays a more consistent and practical role in shaping fans' WTP.

#### Start player Factor:

According to the literature, the presence of prominent or internationally recognized players, such as Harry Kane in the Bundesliga, can significantly enhance fan interest and increase their WTP for attending or streaming a match. However, the findings from the interviews conducted show a more nuanced picture. Only 3 out of 14 interview participants indicated that the presence of a star player would positively influence their WTP. The majority argued that their interest in a match is primarily driven by the overall game dynamics and team performance, rather than by individual players. For example, one participant explained: *“Star players don’t matter much to me, I watch for the club”* (A5). Another shared: *“If Harry Kane is playing, I might be more interested, but not just because of him”* (A11). These responses suggest that while star players may add some appeal, their influence is secondary compared to broader team and match-related factors.

### **Season Progress Factor:**

The influence of season progress on WTP, identified as a key factor in the literature, was strongly confirmed by the interview findings. All 14 participants agreed that the point within the season significantly affects their WTP. Specifically, 12 out of 14 interviewees emphasized that the beginning of the season holds high appeal, as fans are curious to see how their team performs after the break and there are no clear expectations yet. One participant explained: *“At the start of the season I’m curious how my club performs, I’d definitely pay”* (A2).

Another highly influential factor is the end of the season, rated by most interviewees as the second most important overall. Many indicated they would pay a premium for decisive matches involving titles, European qualification, or relegation. As one participant explained: *“End of the season is the most exciting, if it’s about relegation or Champions League spots, I’d pay more”* (A4). Another echoed this by stating: *“Relegation battles are premium for me”* (A1).

### **Sport Performance Factors:**

The performance level of the teams involved in a match was identified as a relevant factor by 10 out of the 14 interviewees. While most participants expressed a primary interest in watching games involving their favourite club, many also indicated increased interest in matches featuring high-performing teams. For example: *“Games between Bayern and Dortmund are always worth the money”* (A6). Others mentioned that surprise high-performing teams can add to the attraction of otherwise less significant games: *“Surprise high-performing teams make matches more attractive”* (A11). These unexpected success stories were seen as adding to the appeal of certain matches, even if they did not involve traditionally dominant teams.

## **Competitive balance**

The concept of competitive balance, or the perceived uncertainty of a game's outcome, was mentioned by 7 of the 15 participants as influencing their WTP. As one noted: *"I'd pay more if the match outcome is uncertain"* (A8). Another added: *"Close relegation battles are more exciting than a clear Bayern win"* (A12). These findings highlight that unpredictability increases match attractiveness and strengthens the case for selective PPV.

A key theme was the subjectivity of perceived competitiveness. Some interviewees noted that seemingly one-sided games often became engaging through unexpected dynamics, which at times increased their WTP even for matches that initially seemed uninteresting.

## **Geographical cultural factors and fan loyalty**

Fan loyalty emerged as the most influential factor among the interview participants, with all 14 out of 14 interviewees stating that they have the highest interest and WTP when their favourite club, often their local team is playing. This strong emotional connection to a specific club significantly outweighed other factors discussed in previous sections. Many interviewees noted that elements such as time, weather, or competing teams become secondary when their own club is involved, indicating a high level of identification and loyalty. As one explained: *"If my club plays, I always want to watch, that's where I'd pay"* (A1). Another confirmed: *"Loyalty to my club outweighs everything else. I'd pay just for them"* (A9).

This loyalty also surfaced as a key reason why several interviewees currently refrain from subscribing to existing broadcasting services. Specifically, 10 out of the 14 participants expressed frustration that they would have to pay for expensive full-package subscriptions that include content they do not consume, just to watch their favorite team. This reflects a clear demand for more customized or flexible access models, such as club-specific PPV offerings.

Beyond loyalty to their favourite club, 8 out of the 14 interviewees also reported increased interest and WTP for local derbies or historically significant rivalries, even if they do not usually follow the teams involved. These matches were perceived as culturally and emotionally significant, offering added entertainment value regardless of direct club affiliation. This supports the idea that regional identity and cultural relevance also play a role in shaping fan interest and payment behaviour. Mentioned for example as: *Derbies with my team are non-negotiable; I'd always pay"* (A6). Rivalries were seen as particularly attractive: *"Derbies feel like finals, worth every cent"* (A14). This reflects a clear demand for more customized or flexible PPV solutions aligned with cultural and emotional fan identities.

## **Content quality and Exclusivity**

Streaming quality was identified as one of the most important factors influencing both interest and WTP. All 14 interview participants emphasized the critical role of technical performance in shaping their viewing experience. The most frequently cited concern was streaming stability, with particular emphasis on avoiding delays, buffering, or connection interruptions during live matches. This was consistently described as the single most decisive element of quality. Following stability, visual resolution, such as Full HD or 4K quality, was also considered important by the majority of interviewees. As one put it: *“Streaming has to be stable, no buffering, otherwise I wouldn’t pay”* (A2). Another echoed: *“Unstable streams ruin the entire experience. I won’t pay again if that happens”*.

In addition, the absence of advertising interruptions during live game time was frequently mentioned as a key quality factor. Several interviewees highlighted that uninterrupted viewing significantly improves immersion and enjoyment, particularly in emotionally intense moments of the match. Ad-free experiences were considered a critical expectation for paid content and were often viewed as a basic quality standard that should be guaranteed in any PPV model. As mentioned, *“Ad-free is a must if I’m paying PPV”* (A7).

Additional quality features, such as adjustable camera angles or the option to select different commentary tracks, were only mentioned by 2 out of the 14 interviewees *“If the service offered extra features like multiple camera angles, I’d try it”* (A1). Most participants expressed satisfaction with the standard broadcasting setup and did not perceive significant added value in these supplementary options. Interestingly, one participant suggested a forward-looking enhancement involving virtual reality (VR), such as a camera angle from a player’s perspective on the field *“VR or new perspectives could justify higher prices in the future.”* (A13). This was described as an innovation that could justify a higher WTP in the future, particularly for tech-savvy users seeking a more immersive experience. Although this idea was not widely shared among the current sample, it offers a glimpse into potential future developments in interactive sports streaming.

Exclusivity emerged as another factor influencing interest and WTP. Many interviewees saw exclusive access as valuable but also noted that widespread illegal streaming undermines its effect. While rights holders promote exclusivity as a selling point, consumers are aware of alternative access, which weakens its role as a pricing lever. This highlights the need for legal providers to add value through quality, reliability, and security. As one participant put it *“Exclusivity only works if the quality is better than illegal streams”* (A11).

### **Impulse to Purchase:**

The factor of impulse-driven purchasing in relation to WTP was acknowledged by 10 out of the 14 interviewees. Most participants indicated that they would be willing to accept a premium price if the purchase occurred close to the game's kick-off, often within a 24-hour window. At the same time, several interviewees expressed that they would appreciate a discount for purchasing access to games well in advance.

Despite this, the majority emphasized their WTP a premium, primarily because what they currently miss in the existing subscription models is flexibility. The possibility of making short-notice, game-specific purchases, offered through a PPV model was seen as a valuable alternative worth paying extra for. One interviewee explained: *“If I buy early, I expect a discount”* (A4), while another stated: *“If I get a discount at the start of the season, I could imagine buying more games at once”* (A8). At the same time, participants confirmed their readiness to pay a premium for last-minute purchases: *“Flexibility in short notice purchases makes PPV attractive”* (A9).

### **Pricing range:**

To gain an understanding of the perceived fair price range, the potential target group was asked about two scenarios: the price they would still be willing to pay for a match of lower personal interest, and the maximum price they would accept for a match of high personal interest. On average, the minimum price mentioned was €4.50, while the maximum price on average reached up to €17,50.

### **5.2.4 Additional insights**

Additionally, to the defined factors and the primary focus of this thesis on analysing WTP and interest in PPV models, interviewees were also asked about their general perspective on the current sports broadcasting market and potential improvements within this sector. A commonly mentioned suggestion was the desire for more flexible subscription models, specifically the option to subscribe solely to a single club. As one interviewee stated, *“I would prefer the option to subscribe just for my club instead of paying for everything”* (A3). This would better align with their expectations for personalized and flexible access.

Furthermore, 7 out of 14 interviewees expressed interest in purchasing a day pass for the Bundesliga to watch all matches of a given matchday in a conference-style format. Several respondents explained that *“a day pass for all matches in conference style would be very*

*attractive*” (A4), while others added that *“I would like to create my own conference with only the games I’m interested in”* (A6). Some also wished for the option to either watch all chosen matches simultaneously in a multi-screen view or to experience an automatically directed conference mode that switches between games based on live, high-intensity situations. One participant emphasized that *“multi-screen viewing or an automatic highlight switcher would make PPV more exciting”* (A7), pointing toward a demand for innovative viewing features.

Another factor influencing WTP in the context of sports broadcasting was the desire for simplicity and ease of access when using PPV options. The majority of interview participants expressed a strong preference for platforms that allow quick and straightforward access to individual games without the need for lengthy registration processes. As one participant put it, *“I don’t want long registrations; access should be one click away”* (A9), or another regarding the payment process: *“Apple Pay or PayPal should be enough to buy a match, no complicated setup”* (A11).

### **5.3 View of current subscription owners**

This section examines the perspectives of individuals who currently hold at least one legal sports streaming subscription. Fourteen participants were interviewed in a semi-structured format to explore their views on the existing subscription model, their actual usage behaviour, and their interest in potential PPV alternatives. The interviews also addressed how PPV might affect their current subscription status and how they perceive the possibility of exclusive matches being available only via PPV.

#### **5.3.1 Current Usage and Status**

Of the 14 interview participants, 5 reported currently holding two subscriptions, specifically to Sky and DAZN. The remaining 9 interviewees had one active sports streaming subscription, with 6 subscribing to Sky and 3 to DAZN.

Regarding satisfaction with their current subscriptions, 9 out of 14 stated they were generally content with the content offered. However, 5 interviewees expressed a desire for more focused football content, noting that they were not particularly interested in the platform’s broader sports or entertainment offerings. Yet, several participants also criticized the price level, explaining that *“for me the current subscription is already too expensive, especially since I only watch maybe one or two games a month”* (B3) and that *“I would not pay for Sky and DAZN*

*together; it is simply not worth it” (B7). This dissatisfaction was often linked to the perception that “prices have gone up, but the product feels the same or even worse” (B9), with some interviewees even admitting that “I cancelled once already, and I often think about cancelling again” (B6).*

When asked about their initial motivation for subscribing, 10 participants cited football as the primary reason. The remaining 3 indicated that other sports, such as basketball, were their main interest. Football remained the central point of interest across most interviewees. While 4 participants mentioned they were mainly interested in Bundesliga games, the majority reported also following international competitions such as the UEFA Champions League and Europa League. Additionally, 9 of the 14 interviewees noted a strong interest in other European top leagues like the Premier League, La Liga, or Serie A. Accessibility and fragmentation also emerged as recurring complaints. Several respondents explained that *“I never know where to watch which game, and I find that very frustrating” (B1)* and *“sometimes I just skip games because I don’t want to go through the hassle of switching platforms” (B11)*. For others, fragmentation reduced their viewing motivation altogether, as one interviewee admitted: *“I just don’t bother anymore; if I cannot watch it easily, I won’t watch it at all” (B4)*. These insights underline that structural issues in the broadcasting market, beyond pricing alone, are central to fans’ current experiences. Finally, some participants expressed broader doubts about the system’s sustainability, remarking that *“the system feels broken; fans pay more but don’t feel like they are getting more value” (B14)*. This aligns with widespread concerns about whether the current multi-subscription model can meet fans’ expectations in the long term.

In terms of actual usage, interviewees reported watching an average of 3 Bundesliga matches per month. On average, Bundesliga content made up around 60% of their total football viewing time. One notable insight was that all participants mentioned they don’t always watch full individual matches; many regularly use the “Konferenz” (live multi-game broadcast) mode to follow multiple games at once.

### **5.3.2 Opinion about PPV**

To assess the potential risk of subscription cannibalization through the introduction of a PPV model, interviewees were asked whether they would consider switching from their current subscription to a PPV option, and to explain the reasoning behind their choice.

Out of the 14 participants, 4 indicated that they would consider replacing their current subscription with a PPV model. Notably, 2 of these 4 interviewees were those who currently subscribe to both *Sky* and *DAZN*. They explained that one of their subscriptions is often used only for a few specific matches and therefore could potentially be replaced by more flexible PPV access.

The remaining 10 participants stated they would not cancel their existing subscriptions, even if a PPV option were introduced. Their main argument was that, while football is the primary reason for subscribing, they also enjoy other sports content offered on the platforms, such as basketball or Formula 1. Additionally, most of them have a strong interest in international football beyond the Bundesliga, including matches from the Champions League or other major European leagues, which they access through their current subscriptions.

Those favouring a switch to PPV were mainly interested in specific games, usually their favourite team's. Other content was consumed only because it came with the subscription, leading them to view PPV as a cheaper and more flexible alternative.

### **5.3.3 Add on perspective**

To explore whether current subscription holders could also be a potential target group for PPV offerings, interviewees were asked if they could imagine using PPV for games not currently included in their subscription.

Several interviewees pointed out that PPV could provide them with a more flexible and cost-efficient way to follow their club. One participant stated, *"I would pay for my club's important matches, but I don't need another subscription"* (B5). Another added, *"I'd buy single matches outside my subscription, for Friday games of my favorite club"* (B2), while a third explained, *"I'd consider PPV for matches not included in my subscription package"* (B9). These comments illustrate that while full-package subscribers may not see value in PPV, single-subscription holders could view it as a complementary solution to fill specific gaps in coverage.

Among the participants who already subscribed to both Sky and DAZN, most stated that they currently have access to all Bundesliga games and therefore do not see an immediate need for an additional PPV option. However, from the remaining 10 participants (those with only one subscription), 8 indicated that they could imagine using a PPV model for matches of high personal interest that are not covered by their existing subscription. Some even admitted to occasionally purchasing a one-month subscription to access a single important match. Additionally, all interviewees expressed the expectation that, as existing subscribers, they

would receive a discount on any PPV content. However, many acknowledged potential challenges in this setup, particularly if the PPV game were hosted on a different platform than their current subscription provider. This would require some form of cooperation or technical integration between competing platforms, which several interviewees saw as a possible barrier to implementation.

### **5.3.4 Risk of price discrimination**

Since introducing a PPV option could pose a potential risk of price discrimination for current subscription holders, interviewees were asked for their views on this scenario. The dominant consideration among participants was the price point of a PPV match. Several stated that if PPV games were offered at a significantly lower price, they would feel disadvantaged as subscribers and might consider switching to a PPV model instead. One participant admitted, *“I would cancel DAZN if PPV were cheaper for single games”* (B9), while another noted, *“If PPV comes in, I will definitely rethink my subscription”* (B5). Similarly, some participants raised concerns about the added value of subscriptions if PPV entered the market, with one highlighting that *“subscriptions already feel overpriced; PPV could make this worse”* (B12). These statements underline the cannibalization risk of PPV among existing customers, especially if the pricing structure is not well balanced against current subscription models. Most of the price suggestions mentioned by participants were below €5 per game. The reasoning was straightforward: at such a low price, they could selectively watch only the matches they were most interested in and ultimately spend less compared to maintaining a full subscription. In this case, PPV would be perceived as a more cost-effective and flexible alternative.

### **5.3.5 Additional insights**

To gather further perspectives on the current sports broadcasting market, subscription owners were asked whether they had any additional wishes or suggestions for change. Many interviewees expressed a strong desire for greater individualisation in the broadcasting industry, specifically, the ability to pay only for the content they truly want to watch, rather than for broad packages that include content they do not use.

Another frequently mentioned point was the need for greater contractual flexibility. While all subscriptions are technically available in a monthly contract model, participants noted that these monthly options are often priced significantly higher than annual or 24-month contracts. As a result, they frequently choose the longer-term plans purely for economic reasons, even though they would prefer the flexibility of shorter contracts.

## **5.4 Industry Experts**

This section examines the perspectives of industry experts. In total, seven interviews were conducted with professionals working in the sports broadcasting sector. The interviewees included individuals in senior management and decision-making positions at major sports broadcasting providers such as Sky and DAZN, as well as independent industry consultants. The objective of these interviews was to gain expert insights into the feasibility of a potential PPV option, including its risks, barriers, target audiences, opportunities, and possible strategic implementations.

### **5.4.1 General view on PPV**

To capture industry experts' perspectives on PPV, the interviews first explored their overall views on the model. All experts agreed that today's consumers increasingly expect flexible access to content, illustrated by DAZN's early success in Germany with a monthly subscription priced between €10 and €15, which aligned well with market expectations at the time. In their assessment, PPV is particularly well-suited for event-based sports such as boxing, tennis, or golf, where fans typically purchase access to single, standalone events. By contrast, the Bundesliga, with 306 matches spread across a season, presents a different dynamic. Experts argued that in this context, fans are less likely to purchase access on a game-by-game basis.

Instead, they positioned PPV as a complementary rather than a substitutive model. According to the experts, PPV could serve as an add-on for occasional or event-driven viewers, creating incremental revenue opportunities without undermining the subscription system. Subscriptions, in their view, should continue to form the backbone of sports broadcasting monetization, while PPV offers a flexible extension that targets additional customer segments.

### **5.4.2 Potential target group and opportunities**

Experts generally agreed that defining an entirely new customer segment for Bundesliga PPV would be challenging, as many potential PPV buyers already fall within the existing subscription base. Nevertheless, two distinct subgroups were consistently identified.

The first are casual Bundesliga fans who follow the league irregularly and have no interest in committing to a subscription. Their motivation to purchase PPV access is often linked to high stakes matches such as derbies, title deciders, or relegation battles. *“Some fans only watch the*

*derby or when their team might win the title, they won't buy a season pass*" (C1). Another noted, *"There's a price point where they'll pay for the one or two matches they really care about, but not more"* (C7). A third interviewee pointed out, *"For them, it's about moments, not the season, and PPV is a way to monetise those moments"* (C5).

The second target group consists of younger, flexibility-oriented audiences, especially those aged 16–34. These consumers are accustomed to on-demand digital content and expect easy, frictionless transactions, often via mobile devices. *"The 16–34 group hates long-term contracts but will pay for a big match on their phone"* (C4). Another observed, *"They live on platforms like Netflix, Twitch, and YouTube, if football wants their attention, it has to sell itself the same way"* (C2). A third explained, *"They are more likely to pay €5 for an instant stream than sign up for a €30 monthly plan"* (C3).

Beyond these segments, experts highlighted PPV's potential as a strategic tool for audience engagement and data collection. *"A limited PPV trial could give us priceless data on price points and match appeal"* (C6). Others stressed the role of cross-platform marketing, particularly through club channels. *"Clubs have huge Instagram followings, why not sell PPV directly through that?"* (C2). Another added, *"You're missing an opportunity if you're not pushing PPV in the exact spaces where fans already engage with their team"* (C1).

### **5.4.3 Risk and Barriers of PPV**

The main concern raised by experts was the risk of cannibalising subscription revenues. Given the high upfront costs of Bundesliga broadcasting rights, predictable income from annual or 24-month contracts is seen as essential. As one expert mentioned, *"If a subscriber switches to PPV, we lose recurring revenue, that's the biggest danger"* (C3). Another elaborated, *"Subscriptions are the safety net that keeps the rights business viable; without them, every season would be a gamble"* (C4). A third pointed out that even minor shifts in customer behaviour could have a disproportionate financial impact: *"If only 30% of subscribers drop out for PPV, the rights deal could already be underwater"* (C7).

Experts also pointed to PPV's revenue volatility, which depends on the appeal of individual matches. *"In a bad season for a top club, your PPV sales could collapse, while your costs stay the same"* (C5). Another added, *"You're tying your revenue to the fixture list, and you can't control how exciting the matches will be"* (C6).

The DFL's central marketing system was cited as another major barrier, since current rules require all 306 matches to be offered under identical terms, blocking small-scale pilots. As one expert explained, *"If you could just trial the top 10 or 20 matches in a season, PPV might be worth testing. But the way the rights are structured, you'd have to offer every single match, which kills the concept before it starts"* (C5). Another added, *"You can't run a pilot when you're forced to sell the least attractive games alongside the big ones, you'll burn money before you get any useful data"* (C2). A third concluded, *"The problem isn't just profitability; it's that the current framework blocks the small-scale experiments we'd need to see if PPV can work"* (C6).

Finally, experts discussed dynamic pricing as a theoretically attractive but practically risky strategy. While adjusting prices based on demand could optimise revenue, several interviewees warned that football fans are particularly sensitive to perceived unfairness. One commented, *"Dynamic pricing sounds great on paper, but fans will complain if they see different prices for the same match"* (C7). Another added, *"In football, it's not just about the money, fans talk to each other, and if they feel they've been charged more than someone else, it becomes a loyalty issue"* (C2). A third concluded, *"In an age of social media, one bad pricing story can undo years of trust"* (C4).

#### **5.4.4 Possible implementation**

When asked about piloting a PPV option for a limited number of Bundesliga matches, experts emphasized that this would require DFL approval. Under the central marketing system, all games must be equally available to rights holders, preventing selective PPV experiments without regulatory change. *As one expert put it, "You can't run a meaningful pilot under the current rules, you'd have to sell the low-interest games along with the big ones, and that kills the economics"* (C5). Another added, *"The only way PPV could work for the Bundesliga is with DFL approval to test it in a controlled, limited way, but right now, that door is closed"* (C2). Experts generally framed PPV as a complement to subscriptions, limited to event-driven matches such as cup finals or marquee friendlies. *"A few cup games on PPV could work without hurting subscriptions"* (C1). *"If you keep it to rare events, you can target casuals without making your core subscribers feel they are missing out"* (C6). *"PPV works best when it feels like a special treat, not a regular product"* (C4). Several also suggested hybrid models, positioning PPV as an upsell within subscriptions. *"It could be positioned as an upsell for subscribers, you keep your base happy and still monetise special events"* (C3). Another warned, *"Bundling PPV within a subscription ecosystem is the safest way forward; you don't want it to be perceived as a competing product"* (C4). Still, perception risks were seen as critical. *"If a*

*subscriber is paying €30 a month and sees a casual fan watch the same match for €3, you've got a problem"* (C6). *"The key is positioning, PPV should feel like an extra, not a cheaper alternative to what subscribers already have"* (C7). In sum, experts viewed PPV as a niche add-on, viable only with DFL approval and careful integration into the subscription model.

#### **5.4.5 Additional information**

Beyond economic and structural aspects, experts emphasized several strategic factors shaping the viability of PPV in the Bundesliga. One recurring theme was club-specific media packages. While such offers could attract strong demand from fans of major clubs, experts noted their incompatibility with the DFL's centralized rights model. *"Club-specific packages would be a goldmine for Bayern or Dortmund, but they'd blow up the revenue-sharing model"* (C5). Another explained, *"The DFL is trying to protect competitive balance. If the top clubs sell directly, the smaller clubs lose their media income, and the league becomes less competitive"* (C3). A third added, *"It's not just about economics, it's about politics inside the league. The smaller clubs will never vote for it"* (C7).

A second theme concerned richer content strategies to strengthen PPV adoption and fan engagement. Experts suggested expanding beyond match-day coverage to behind-the-scenes material and player-focused content. *"Look at what F1 did with Drive to Survive, that's how you hook a new generation"* (C6). Another pointed to the NBA's success: *"They've turned off-court content into a second product; the Bundesliga hasn't even scratched the surface"* (C2).

Finally, experts stressed the importance of continuous, digital-first engagement for younger audiences. *"The league still thinks match days are enough, but younger fans want 24/7 engagement"* (C4). A third concluded, *"It's about creating constant touchpoints, so fans feel connected even when there's no game"* (C3).

### **6. Discussion**

The interview results provide clear insights into the first research question on the introduction of PPV. Findings indicate that integrating a PPV model into the current broadcasting landscape could increase customer satisfaction and generate additional revenue. A considerable share of football fans, particularly non-subscribers, expressed interest in paying for individual Bundesliga matches. Even some existing subscribers saw PPV as a useful complement for games not covered by their packages, pointing to an underserved audience segment that could be reached with a more flexible model.

However, regarding the second question about possible risks and barriers, several critical considerations must be addressed before implementing a PPV model. A major concern raised by industry experts is the significant financial risk involved. Broadcasters rely heavily on their stable revenues from subscription holders, which are essential for financial planning given the substantial upfront costs of acquiring Bundesliga broadcasting rights. If a portion of this predictable subscription income were lost to a PPV alternative, it could undermine the economic viability of their business model.

Closely linked to this issue is the risk of cannibalization. Streaming providers may lose existing subscription customers, particularly those who currently subscribe but only watch a limited number of matches, if these users shift to the more flexible and potentially cheaper PPV model. To address this challenge, providers should leverage their internal customer data to analyse actual usage patterns, such as how many matches subscribers watch on average per month or season. Based on these insights, they could establish a minimum PPV price threshold that ensures full subscriptions remain the more cost-effective option for frequent viewers. By carefully calibrating PPV pricing in this way, broadcasters can preserve the value proposition of subscriptions while still making PPV attractive to casual fans.

Although some substitution is likely inevitable, experts highlighted that the potential to reach new customer segments, such as casual supporters or fans with strong loyalty to a single club but little interest in the wider league, could outweigh the losses. With a strategic approach, PPV could therefore broaden market reach, enable more tailored pricing strategies, and ultimately generate incremental revenue without destabilising the subscription model.

Another key challenge lies in the legal and contractual framework surrounding broadcasting rights. The DFL, as the central rights holder, operates under a central marketing approach in its agreements with streaming providers. While it is technically possible to offer PPV streaming under this system, current regulations would require providers to make all matches available via PPV, rather than selectively offering specific high-profile games. This limitation reduces the flexibility of testing the concept through small-scale trials. To implement a limited pilot project, featuring only selected matches, coordination and agreement between the broadcasters and the DFL would be necessary.

When evaluating the potential to convert current users of alternative or illegal streaming services into paying customers, a clear divergence emerged between the views of industry experts and those of non-subscribing interviewees who currently rely on such alternatives.

Industry experts generally described this group as highly price-sensitive, arguing that their current avoidance of official subscriptions suggests a low WTP for legitimate sports streaming. In contrast, a significant share of the interviewees themselves reported that they already pay for certain alternative subscription-like services, even if these are unofficial. This indicates that some within this segment may, in fact, be willing to pay for a legal PPV option, provided it meets their needs.

Several non-subscribers expressed genuine interest in a potential PPV offering, citing dissatisfaction with their current alternatives. The most frequently mentioned drawbacks of these unofficial services were:

- Inconsistent quality, including buffering, lag, and unstable connections.
- Lower picture resolution compared to legal providers.
- Lack of reliability and no guarantee that streams will function for the full match.
- Data security concerns and the perceived risk of exposing personal information to untrustworthy providers.
- Potential legal consequences associated with using illegal streams.

For these users, a legal PPV option that offers stable quality, secure payment, and flexibility could be a compelling alternative, particularly if priced competitively.

An interesting divergence emerged between the perspectives of industry experts and potential customers. Many industry experts emphasized that football fans are highly sensitive to pricing differences and could perceive varying prices for different clubs or matches as unfair price discrimination. In contrast, most interviewees suggested that their WTP would not remain constant but would instead depend on the context of the match. For example, they explained that they would be willing to pay more if their favourite club was involved, if the match has significant impact, or if it was a traditional derby.

With respect to ideal pricing, the interviews revealed several key factors influencing customers' WTP for Bundesliga PPV matches. These were evaluated using a 100-point allocation exercise, in which participants distributed points across different criteria to indicate their relative importance. The resulting ranking of WTP factors provides a structured basis for further analysis and serves as a reference model for assessing pricing dynamics. :

1. **Appearance of the favourite club (40/100)**

This was by far the most influential factor. In most cases, the favourite club was also the local club, meaning fans were significantly more willing to pay a premium when their team was playing.

2. **Streaming quality (17/100)**

The technical reliability of the stream, particularly stability and resolution, was the second most important factor. Many participants stated that they would be willing to pay more for guaranteed smooth streaming in Full HD or 4K.

3. **Season progress (15/100)**

Matches that could decide the league title, secure qualification for European competitions, or determine relegation were seen as particularly valuable, with fans expressing higher WTP for these decisive fixtures.

4. **Derby matches (10/100)**

High-profile rivalries, even involving teams the viewer does not normally follow, were often considered worth a higher price due to the emotional and cultural significance of these games.

5. **Sport performance of the participating teams (5/100)**

Viewers valued games involving teams in good form or producing exciting football, although this factor ranked lower than others.

6. **Competitive balance (5/100)**

Some fans expressed higher interest in matches with an uncertain outcome, such as closely matched teams in the league table, though this was not a primary driver of WTP.

7. **Timing of purchase (5/100)**

The option to purchase a match close to kick-off, sometimes within 24 hours, was mentioned as a modest influence on WTP, with some fans willing to pay slightly more for this flexibility.

8. **Timing of the match (day of the week, time of day, summer vs winter) (3/100)**

While mentioned, the specific scheduling of a match had the least influence overall compared to other factors.

### **Not considered influential despite being present in the literature:**

- **Presence of a star player** (e.g., Harry Kane) did not significantly increase WTP for most interviewees, who prioritised the overall match and team quality.
- **Additional broadcasting features** (such as multiple camera angles or alternative commentary) were generally viewed as unnecessary extras rather than decisive pricing factors.

Building on these insights, key differences emerge between the literature and the interview findings. Factors such as the presence of a star player or the timing of the match, frequently identified in the literature as important drivers of WTP, were not considered relevant by the interviewees. Instead, they emphasized the appearance of their favourite club, streaming quality, and the progression of the season as primary determinants. Notably, with respect to streaming quality, interviewees highlighted its potential to attract non-subscribers and provide a competitive advantage over illegal streaming.

The literature indicates that, at the match level, demand is inelastic. However, the interviewees opposed this framing of subscriptions, suggesting a dissonance between the inelastic demand identified at the match level and the more elastic willingness to pay observed from the fans' perspective.

## **6.1 Limitations**

While this study provides valuable insights into the potential of a PPV model in the German Bundesliga streaming market, several limitations must be acknowledged. The interviews were conducted with a focus on potential target groups of streaming providers, including both current subscription holders and non-subscribers, until thematic saturation was reached. However, to gain a more comprehensive understanding of the entire potential audience, a large-scale quantitative survey conducted by broadcasting providers would be ideal.

Furthermore, the WTP assessments, as well as the interviews in general, were based on a theoretical framework without real financial consequences for the participants. As the literature suggests, hypothetical scenarios may lead to different assumptions and responses compared to situations where participants face actual monetary decisions. Therefore, a scenario involving real financial stakes could yield more realistic outcomes. While this was not feasible within the scope of this thesis, the findings nonetheless provide a valuable foundation for further research, including the design and testing of PPV models in real-world pilot projects.

## 6.2 Future Research

To build upon the findings of this study and further explore the viability of PPV models in the Bundesliga broadcasting market, several avenues for future research are recommended.

First, future surveys should aim to include a significantly larger and more segmented sample, ideally conducted or supported by streaming providers themselves. These companies hold extensive user data, including viewing habits, subscription types, and platform engagement, which could be leveraged to design more targeted and accurate questionnaires. By combining stated preferences with behavioural data, a more holistic understanding of WTP and consumption patterns could be achieved.

Secondly, streaming providers should consider implementing pilot projects to test the viability of the PPV model under real-world market conditions. A relevant example is Amazon's current experiment with PPV offerings for selected Ligue 1 matches in the United Kingdom, which serves as a useful benchmark for similar initiatives in other markets. In the context of the German Bundesliga, such pilot programs could focus on strategically selected fixtures to evaluate consumer demand, technical feasibility, and pricing sensitivity. High-profile matches like FC Bayern München vs. Borussia Dortmund, commonly known as "Der Klassiker", are particularly suitable due to their consistently strong nationwide viewership and cultural significance. Moreover, matches involving clubs with a loyal yet regionally concentrated fan base, even if those teams are not currently positioned at the top of the league, may also be appropriate for PPV testing. A prime example is 1. FC Köln, which, despite recent sporting challenges, boasts one of the largest fan communities in Germany with over 140,000 official members and ranks among the top clubs in Germany by membership. (Sky 27.02.2025) Such cases could help determine whether strong club loyalty alone is sufficient to generate PPV demand beyond sporting success. For such initiatives to be viable, providers would need to work closely with the DFL to obtain approval for streaming selected matches as PPV pilots without triggering the obligation to make every Bundesliga match available via PPV. This collaboration would be essential to ensure compliance with the DFL's central marketing framework while allowing for controlled market testing.

## **Large Language Model Use**

In the preparation of this thesis, Large Language Models (LLMs) were employed in a strictly limited and supportive capacity. Their use was confined to linguistic refinement, specifically enhancing sentence clarity, coherence, and style. At no stage were LLMs applied to generate substantive content, formulate arguments, or derive conclusions. All concepts, analyses, and results presented are entirely the author's own or are properly attributed to their original sources. The selective use of LLMs served exclusively to improve readability while safeguarding the originality and academic integrity of the thesis.

## **Appendix**

### **Appendix A: Interview Guide potential Target group**

#### **Section 1: General Interest and Viewing Behaviour**

1. Are you interested in the Bundesliga and have currently no sport broadcasting subsection covering the Bundesliga?
  - What are the main reasons you are not subscribed?  
(e.g., cost, complexity, lack of interest, limited usage, technical issues)

#### **Section 2: Barriers and Alternatives**

3. Do you consider using illegal streams or VPNs to access Bundesliga matches?
  - Under what conditions would this become an option for you?
  - How does pricing influence this decision?
4. Do you think the current pricing and fragmentation of Bundesliga broadcasting rights (e.g., different providers for different matchdays) discourages you from subscribing?
  - Please describe your experience navigating these options.

#### **Section 3: Hypothetical PPV Model and Willingness to Pay**

5. Imagine a scenario where you could purchase individual Bundesliga matches via a PPV model. What factors would most influence your willingness to pay (WTP)? Please share your thoughts on the following dimensions:
  - ***Seasonal timing***  
Would pricing expectations differ depending on the time of year (e.g., winter vs. summer)?
  - ***Day and time of the match***  
Would you be willing to pay more for a Saturday evening match compared to a weekday afternoon?

- ***Timing of the purchase***  
Would the time at which you buy the PPV access affect how much you would pay (e.g., one week in advance vs. one hour before kick-off)?  
Would you expect early-bird discounts or be willing to pay a premium for last-minute access?
- ***Presence of star players***  
Does the involvement of well-known players (e.g., Harry Kane) increase the perceived value of a match?
- ***Stage of the season***  
Would matches near the end of the season, such as those impacting the championship, European qualification, or relegation, be more valuable to you than early-season matches?
- ***Match quality and competitiveness***  
Would the expected closeness or quality of the game influence your WTP?  
Are you more interested in top-team matchups or derbies compared to one-sided fixtures?
- ***Local interest and rivalries***  
Would you be more inclined to pay for matches involving your local team or a regional derby?
- ***Streaming quality and platform feature***  
How important are stream quality, stability, and compatibility across devices?  
Would add features such as multi-angle cameras, live statistics, or interactive polls increase your WTP?
- ***Personal preferences***  
Are there any other factors which would influence the price of a PPV game in you option?

Assuming a total of 100 points, how would you distribute these points across the following factors based on their influence on your potential WTP for a PPV game?

#### **Section 4: Target Group and Market Potential**

6. If a PPV model existed, would you see yourself using it regularly, occasionally, or not at all? Why?
7. Would a fair PPV pricing model reduce your likelihood of considering illegal streams or VPN-based access?
8. What range would be PPV price you would be willing to pay?

#### **Section 5: Final Thoughts**

8. Is there anything else you would like to share about your viewing behaviour, pricing expectations, or suggestions for improving access to Bundesliga content?

## **Appendix B: Interview guide current subscription owners:**

Goal: Assess whether existing subscribers would switch to PPV, or whether PPV could function as a complementary model.

### **Section 1: Current Subscription Behaviour and Viewing Habits**

1. Which streaming service(s) do you currently use to watch Bundesliga matches?
2. Do you have one or multiple subscriptions, if multiple: What motivated you to subscribe to more than one service?
3. What was your main reason for subscribing?  
(Was it mainly for football, or are you also interested in other sports or entertainment content?)
4. How satisfied are you with your current subscription(s)?  
(What do you appreciate, and what would you change?)
5. How often do you watch Bundesliga matches (e.g., per week or month)?
6. What share of your overall sports content is related to the Bundesliga?  
Do you regularly follow international football (e.g., Champions League, Premier League)?

### **Section 2: Attitudes Toward PPV Models**

7. If a PPV model were introduced, would you consider cancelling one or more of your current subscriptions?
  - o Why or why not?

### **Section 3: PPV as a Complementary Option**

8. If a match of high personal interest was not included in your current subscription, would you consider paying for it via PPV?

### **Section 4: Perceived Value and Pricing of PPV**

9. At what price point would a PPV offer become more attractive to you than a full subscription?
10. Do you see the risk of price discrimination if PPV is introduced alongside subscriptions?
  - o What would be necessary to make such a hybrid model fair?

### **Section 5: Broader Expectations and Industry Suggestions**

11. What improvements or changes would you like to see in the current sports streaming market?
  - o (e.g., price transparency, contract terms, content selection)

## **Appendix C: Interview Guide – Industry Experts and Broadcasting Stakeholders**

## **Section 1: Strategic Perspective on PPV**

1. How do you generally assess the potential of Pay-per-View (PPV) as a revenue model in the context of Bundesliga broadcasting?
2. What legal, contractual, or technical challenges do you see in implementing a PPV model within the current rights and platform landscape?
3. To what extent would existing licensing agreements or platform infrastructures need to be adapted to enable a viable PPV offering?

## **Section 2: Audience Segments and Market Potential**

4. Which types of viewers could be effectively targeted through PPV offers (e.g., casual fans, non-subscribers, or illegal stream users)?
5. Do you believe PPV could be an effective tool to convert users currently relying on illegal or grey-market streaming options?

## **Section 3: Club Specific PPV**

7. Could you envision club-specific PPV offerings (e.g., “Bayern-only” access)?

## **Section 4: Pricing Strategy and Fan Expectations**

9. Would a dynamic pricing model (e.g., varying prices based on match attractiveness) be feasible in the Bundesliga?

## **Section 5: Risks and Barriers**

10. What are the main risks and barriers you associate with introducing a PPV model in a market dominated by subscriptions?

## **Section 6: International Comparison and Use Cases**

11. Do you observe successful PPV models in smaller sports (e.g., handball, boxing)? What lessons from those cases might apply, or not apply, to the Bundesliga?
12. Are there any current international PPV pilot projects or benchmarks that you find relevant for the German market?

## **Section 7: Final Reflections**

13. What is your overall assessment of the role that PPV could play in the Bundesliga broadcasting market?
14. Is there anything you would like to add regarding broader developments or challenges in the German sports streaming landscape

## **Appendix D: Interviewee tables**

**Table 1: Conducted Interviews potential target group:**

<b>Code</b>	<b>Age</b>	<b>Gender</b>	<b>Interview time</b>
A1	25	Male	12:35
A2	28	Male	13:20

A3	24	Male	14:00
A4	22	Male	15:21
A5	26	Male	14:35
A6	28	Male	15:31
A7	29	Female	15:00
A8	32	Male	17:31
A9	25	Male	13:21
A10	36	Female	18:31
A11	21	Female	14:44
A12	19	Male	15:21
A13	35	Male	12:11
A14	26	Male	13:00

**Table 2: Conducted Interviews current subscription owners' group:**

Code	Age	Gender	Interview time
B1	21	Male	10:11
B2	38	Male	8:30
B3	25	Male	10:33
B4	26	Female	9:30
B5	29	Male	10:11
B6	24	Male	7:21
B7	25	Male	9:20
B8	31	Female	10:55
B9	32	Male	11:24
B10	33	Male	8:25
B11	27	Male	7:55
B12	22	Male	9:11
B13	19	Male	10:44
B14	26	Male	9:45

**Table 3: Conducted Interviews industry experts' group:**

Code	Position	Years of experience in the industry	Company	Age	Gender	Interview time
C1	Director	15	A	45	Male	28:11
C2	Manager	20	A	55	Male	26:56
C3	C-Level	25	B	56	Male	31:25
C4	Senior Vice President	16	B	48	Female	35:45
C5	Manager	12	B	35	Male	36:08
C6	Independent consultant	17	C	48	Male	28:25
C7	Manager	11	D	36	Male	33:25

## Appendix E: Interview Summary

<b>Code:</b> View on current subscription <b>Code Description:</b> Capturing interviewees' perceptions of the current Bundesliga broadcasting and streaming environment, including satisfaction with pricing, accessibility, fragmentation, piracy, and market sustainability.			
ID	Frequency	Identified Sentences	Subcode
B3	11	"For me the current subscription is already too expensive, especially since I only watch maybe one or two games a month."	Dissatisfaction with Pricing
B7		"I would not pay for Sky and DAZN together; it is simply not worth it."	
B9		"Prices have gone up, but the product feels the same or even worse."	
B12		"I pay for DAZN, but honestly, I often regret it because the commentary and coverage are not that good."	
C2		"Bundesliga broadcasting is fragmented across too many platforms, which makes it confusing for viewers."	
A4		"For students like me, the current subscriptions are just not affordable."	
B8		"The price-performance ratio just doesn't add up anymore."	
B2		"I only want to watch my club, but I am forced to pay for everything."	
A8		"They increase prices almost every season, but nothing improves."	
C6		"Subscription models are already at their upper limit in terms of pricing."	
B6		"I cancelled once already, and I often think about cancelling again."	
A5	9	"I think accessibility is a huge issue. Not everyone wants three or four different logins just to watch football."	Accessibility & Fragmentation
B11		"Sometimes I just skip games because I don't want to go through the hassle of switching platforms."	
B1		"I never know where to watch which game, and I find that very frustrating."	
C3		"Fans are frustrated that they cannot watch all matches on a single platform anymore."	
A6		"The fragmentation kills the fan experience. It should be much simpler."	

B13		“If I invite friends, we sometimes cannot even watch the game because none of us has the right subscription.”	
A1		“It is ridiculous that I need multiple subscriptions when all I want is Bundesliga.”	
C2		“Fragmentation drives fans away because it creates unnecessary friction.”	
B4		“I just don’t bother anymore; if I cannot watch it easily, I won’t watch it at all.”	
B14	6	“The system feels broken; fans pay more but don’t feel like they are getting more value.”	Market Structure & Sustainability
C5		“From a business perspective, the current model is not sustainable, costs are too high compared to the revenues.”	
C6		“We see huge pressure on providers; rights fees keep increasing while audiences are stagnating.”	
C7		“If only 30% of subscribers drop out for PPV, the rights deal could already be underwater.”	
A2		“Broadcasters are fighting for the same customers, but they don’t create more value.”	
C4		“The model feels outdated in its current form; the revenue balance is too fragile.”	
A10	9	“Everyone I know has used illegal streams at least once.”	Illegal Streaming
B13		“If providers don’t adapt, piracy will only get worse.”	
C5		“Illegal streaming is still a major competitor, whether people like to admit it or not.”	
A3		“Illegal streams are common in my friend group; almost everyone knows at least one source.”	
B10		“It is hard to justify paying so much when streams are available for free, even if the quality is worse.”	
C7		“Broadcasters underestimate how much piracy still happens; they think it’s under control, but it is not.”	
A7		“Many people just accept the risk of poor quality to save money, since there is no fair priced alternative”	
B5		“When the stream is free and one click away, it’s hard to convince fans to pay €30 a month.”	
C1	“Piracy will remain a problem as long as access is fragmented and prices are high.”		

**Code:** Willingness to Pay Factors

**Code Description:** Capturing interviewees’ perspectives on the factors that influence their WTP for Bundesliga PPV matches.

ID	Frequency	Identified Sentences	Subcode
A1	12	“If my club plays, I always want to watch , that’s where I’d pay.”	Fan Loyalty & Cultural Factors
A3		“I don’t want to pay for all matches, just the ones of my favourite team.”	
A5		“I follow my club wherever they go — that’s the only reason I would buy PPV.”	
A7		“If it’s my local team, I will always find a way to watch, even if I have to pay.”	
A9		“Loyalty to my club outweighs everything else. I’d pay just for them.”	
A11		“I don’t care about other clubs; only when mine plays would I purchase a stream.”	
A13		“I’d even pay extra for my team’s decisive matches; they mean everything to me.”	
A2		“If it’s a club-specific offer, I would subscribe immediately.”	
A4		“My interest in football is basically just my favourite club, nothing else.”	
A6		“Derbies with my team are non-negotiable; I’d always pay.”	
A8		“The connection to my team makes the price secondary, I’d pay anyway.”	
A14		“I already skip most games, but when my team plays, I never miss it .”	
A2	14	“Streaming has to be stable, no buffering — otherwise I wouldn’t pay.”	Streaming Quality & Exclusivity
A5		“Technical reliability is the most important thing for me.”	
A7		“Ad-free is a must if I’m paying PPV.”	
A9		“Full HD is important, but reliability is more important than resolution.”	
A11		“Exclusivity only works if the quality is better than illegal streams.”	
A13		“It’s worth paying only if I get guaranteed quality.”	
A1		“Unstable streams ruin the entire experience. I won’t pay again if that happens.”	
A4		“Quality beats quantity; I’d rather pay for one game in perfect quality.”	
A6		“I don’t mind higher prices, but it has to run smoothly.”	
A8		“Legal platforms must beat piracy in quality, otherwise no one pays.”	
A10		“Exclusivity doesn’t matter if I can watch it illegally anyway.”	
A12		“If I pay, I expect premium quality, no compromises.”	

A14		“Buffering is the number one deal breaker.”	
A3		"The main issue with illegal streaming is quality, that's something I would be happy to pay for a PPV option"	
A2	8	“At the start of the season I’m curious how my club performs, I’d definitely pay.”	Season Progress
A4		“End of the season is the most exciting, if it’s about relegation or Champions League spots, I’d pay more.”	
A6		“Middle of the season doesn’t interest me but start and end are worth paying for.”	
A9		“I’d pay for decisive games at the end; they mean more than normal matches.”	
A11		“Qualification matches are worth extra.”	
A13		“Uncertainty at the beginning of the season and importance at the end makes me buy more.”	
A7		“The final weeks decide everything, so I’d definitely pay.”	
A1		“Relegation battles are premium for me.”	
A5	6	“Local derbies have a special atmosphere, I’d pay more for those.”	Derby Matches
A8		“Rivalries like Schalke–Dortmund are always worth it.”	
A10		“Even if it’s not my club, derbies are exciting, and I’d consider paying.”	
A12		“Cultural importance of derbies makes them a must-watch.”	
A14		“Derbies feel like finals, worth every cent.”	
A2		“Derby wins matter more than regular games; I’d pay for those.”	
A6	5	“Games between Bayern and Dortmund are always worth the money.”	Sport Performance
A9		“I pay for matches where my club plays against strong teams.”	
A11		“Surprise high-performing teams make matches more attractive.”	
A3		“The better the team quality, the higher my willingness to pay.”	
A13		“Top of the table clashes are premium content.”	
A8	4	“I’d pay more if the match outcome is uncertain.”	Competitive Balance
A10		“If two top-4 clubs play each other, I’d definitely pay.”	
A12		“Close relegation battles are more exciting than a clear Bayern win.”	
A14		“Unpredictable matches are worth paying for.”	

A3	6	“Winter or summer doesn’t matter if want to see the game”	Timing of the match (Summer vs Winter, Friday vs Weekend)
A7		“During winter I stay home more, so I’d be more likely to buy a PPV match.””	
A8		“For me the weather doesn’t matter, football is football.”	
A9		“If the game is on Friday evening, I usually can’t watch because of work.”	
A10		“Sunday evening matches fit best into my schedule.”	
A11		“In summer I usually watch with friends outside, so I wouldn’t pay for a stream.”	
A7	5	“Sometimes I decide last minute, then I’d pay a bit more.”	Timing of Purchase
A1		"For me it’s ok to pay more for a spontaneous order, since that’s what I expect at PPV"	
A8		"If I get a discount at the start of the season, I could imagine buying more games at once"	
A4		“If I buy early, I expect a discount.”	
A9		“Flexibility in short notice purchases makes PPV attractive.”	
A5	3	“Star players don’t matter much to me; I watch for the club.”	Presence of Star Players
A11		“If Harry Kane is playing, I might be more interested, but not just because of him.”	
A2		“Star players make a difference only if they’re with strong teams.”	
A1	3	“If the service offered extra features like multiple camera angles, I’d try it.”	Broadcasting Features
A13		“VR or new perspectives could justify higher prices in the future.”	
A6		“Alternative commentary or customization might be worth a premium.”	
A3	7	“I would prefer the option to subscribe just for my club instead of paying for everything.”	Additional factors
A4		“A day pass for all matches in conference style would be very attractive for me.”	
A6		“I would like to create my own conference with only the games I’m interested in.”	
A7		“Multi-screen viewing or an automatic highlight switcher would make PPV more exciting.”	
A9		“I don’t want long registrations; access should be one click away.”	
A11		“Apple Pay or PayPal should be enough to buy a match, no complicated setup.”	
A13		“If I can order a game quickly just before kick-off, I’m much more likely to buy.”	

ID	Frequency	Identified Sentences	Subcode
C1	4	“A few cup games on PPV could work without hurting subscriptions.”	Event-based & Limited PPV
C6		“If you keep it to rare events, you can target casuals without making your core subscribers feel they are missing out.”	
C4		“PPV works best when it feels like a special treat, not a regular product.”	
C3		“It could be positioned as an upsell for subscribers, you keep your base happy and still monetise special events.”	
C1	3	“You can’t run a meaningful pilot under the current rules, you’d have to sell the low-interest games along with the big ones, and that kills the economics.”	Regulatory Constraints (DFL)
C2		“The only way PPV could work for the Bundesliga is with DFL approval to test it in a controlled, limited way, but right now, that door is closed.”	
C4		“Bundling PPV within a subscription ecosystem is the safest way forward; you don’t want it to be perceived as a competing product.”	

ID	Frequency	Identified Sentences	Subcode
<b>Code:</b> Opportunities of PPV <b>Code Description:</b> Capturing interviewees’ perspectives on potential benefits and opportunities of introducing PPV in Bundesliga broadcasting, including market expansion, new customer groups, monetization potential, and innovation.			
C2	19	“PPV could help reach casual fans who don’t want to commit to a subscription.”	Expanding Market Reach and new customers
B5		“I would pay for my club’s important matches, but I don’t need another subscription.”	
C6		“A targeted PPV model can attract viewers who only care about big games.”	
A7		“For students like me, PPV would be more realistic than paying €30 each month.”	
C3		“It opens a door to younger audiences who are more used to paying per event.”	

A13		"I would not subscribe, but I could imagine buying one or two matches per season."	
A3		"As someone who doesn't subscribe, I'd definitely pay for one or two top matches."	
A9		"I only care about my team – a PPV option would finally make sense for me."	
A12		"Right now, I just skip games. If I could buy them individually, I'd watch more."	
C1		"PPV can reach occasional viewers who are outside the subscription universe."	
A10		"If a derby was PPV, I would watch it even without a subscription."	
B2		"I'd buy single matches outside my subscription, for Friday games of my favourite club."	
C7		"PPV is attractive for international fans who only want big fixtures."	
A1		"I can't afford a subscription, but I would pay a few euros for my team's key games."	
C5		"PPV could activate those who are not willing to commit monthly."	
A4		"For me, PPV is a chance to watch when I want without wasting money on games I don't care about."	
C3		"It could bring in price-sensitive fans e.g the younger generation."	
A6		"I wouldn't subscribe, but with PPV I could join in for big moments."	
B9		"I'd consider PPV for matches not included in my subscription package."	
C4		"PPV could generate valuable customer data on who buys which matches."	
C3		"It allows testing different pricing strategies without changing the subscription."	
C6	5	"PPV could serve as an upsell within the subscription ecosystem."	Flexible Monetization & Insights
B4		"I would like more flexibility, paying only when I actually watch."	
C7		"PPV can be used to test dynamic pricing and learn what fans are willing to pay."	
C5		"You could use PPV to experiment with new features like alternative commentary."	
A13	6	"If there were VR perspectives or interactive features, I'd pay extra."	Innovation & Fan Engagement
C7		"PPV creates room for innovation in broadcasting formats."	
B6		"I like the idea of customizing the experience with fewer ads or special views."	

C1		“Exclusive PPV packages could build stronger fan engagement.”	
B2		“I would consider PPV if it meant higher quality streams than current services.”	
<p><b>Code:</b> Risks and Barriers of PPV  <b>Code Description:</b> Capturing interviewees’ concerns regarding the introduction of PPV in Bundesliga broadcasting, including threats to subscription stability, regulatory limitations, consumer acceptance, and the influence of illegal streaming.</p>			
ID	Frequency	Identified Sentences	Subcode
C3	8	“If a subscriber switches to PPV, we lose recurring revenue, that’s the biggest danger.”	Cannibalization of Subscriptions
C6		“If a subscriber is paying €30 a month and sees a casual fan watch the same match for €3, you’ve got a problem.”	
B9		“I would cancel DAZN if PPV were cheaper for single games.”	
C7		“The biggest risk is alienating your loyal subscriber base.”	
B5		“If PPV comes in, I will definitely rethink my subscription.”	
C2		“PPV as a competing product would destabilize the whole system.”	
B12		“Subscriptions already feel overpriced; PPV could make this worse.”	
C4		“The positioning is key – if it feels like a cheaper alternative, subscribers will walk.”	
C2	6	“You can’t run a meaningful pilot under the current rules, you’d have to sell the low-interest games along with the big ones.”	Regulatory & Structural Limitations
C5		“DFL’s central marketing rules prevent selective PPV experiments.”	
C6		“Without DFL approval, no broadcaster can launch PPV in Bundesliga.”	
C1		“Current rights agreements lock broadcasters into equal treatment of all games.”	
C7		“The regulatory framework is simply not flexible enough right now.”	
C3		“You can’t bypass the central marketing system; that’s the real bottleneck.”	
A4	4	“If prices are too high, people like me will go back to illegal streams.”	Illegal Streaming & Piracy
C6		“Exclusivity is undermined by piracy; that makes PPV harder to justify.”	
C2		“As long as piracy is one click away, PPV has a huge uphill battle.”	

C7		“Why would I pay €10 if I can watch it for free online?”	
C2	5	“Fans are already frustrated with high prices; PPV could add to the anger.”	Consumer Acceptance & Price Sensitivity
A6		“If PPV is too expensive, no one will buy it.”	
C3		“The fan base is very price-sensitive – they won’t pay unless it’s really important.”	
C4		“Convincing fans to pay on top of subscriptions will be very difficult.”	
B8		“If the price for a PPV is under a certain price I will feel disadvantaged”	

**Code:** Illegal Streaming

**Code Description:** Capturing interviewees’ perspectives on the prevalence of illegal streaming, including patterns of use among fans, problems they encounter, and the concerns raised by industry experts regarding piracy and its implications for PPV models.

ID	Frequency	Identified Sentences	Subcode
A3	9	“Honestly, I often use illegal streams because I don’t want to pay two subscriptions just to see my club.”	Current Usage
B4		“When none of my friends has the right subscription, we just look for free streams online.”	
A7		“It’s too fragmented and expensive, that’s why illegal streaming is so tempting.”	
B9		“Sometimes I watch via free streams if the game is not included in my package.”	
A2		“I would say at least half of my friends watch illegally now and then.”	
B6		“If you can find the same match for free online, it’s hard to justify paying €30 a month.”	
A11		“I even pay €10 a month for an illegal streaming provider, it’s cheaper and shows all games in one place.”	
A2		“I got an alternative stream which is priced around €100 per year but there I got everything in one place”	
C1		“Illegal streaming is one of the biggest hidden competitors for legal providers.”	
A9	6	“The streams often crash or lag, especially when many people watch at once.”	Problems Users Have
B2		“The picture quality is usually very bad, sometimes you don’t even see the ball properly.”	
A10		“I once had a virus on my laptop because of shady streaming sites.”	
B7		“Ads are horrible, sometimes you can’t even close them.”	
A1		“When the stream suddenly stops in the middle of the match, it’s really frustrating.”	

B11		“If there was a legal option that is stable and not too expensive, I would pay rather than suffer through illegal streams.”	
C5	5	“Piracy undermines any exclusivity broadcasters can claim.”	View from Industry Experts
C2		“As long as illegal streaming is so widespread, PPV will struggle to gain acceptance.”	
C4		“You cannot convince fans to pay if they know they can get the same content for free, even illegally.”	
C7		“The real challenge for PPV is to create added value that illegal streams cannot provide, like quality and reliability.”	
C3		“For rights holders, piracy is not only a financial risk but also a question of consumer trust.”	

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