



# FUTURE OF USA SPORTSTECH REPORT

Top Challenges, Insights & Solutions  
for Sports Innovators

2025 EDITION

## CONTRIBUTORS



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DRAKE STAR

Houlihan Lokey



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# INTRODUCTION

Welcome everyone to PEAK's 2025 Future of USA SportsTech Report. This is the result of months of conversations, surveys, and deep collaboration with some of the most forward-thinking voices in sports technology and innovation. We're proud to share what we've learned, and where we believe the industry is heading.

At PEAK, we see sports technology and innovation not just evolving, rather accelerating at high speeds. New entrants are disrupting the field, legacy organizations are seeking to adapt quicker than ever, and innovation is no longer a buzzword - it's a revenue driver. This report captures a snapshot of that momentum. It's a curated view into the sector that's becoming more dynamic, more integrated, and more vital to the future of global sport.

But this report is only the beginning. What you'll find here is just a glimpse of what we bring to life at PEAK - our flagship conference that brings together startup founders, sport executives, innovation leaders, and global investors in one room. Consider PEAK the Annual General Meeting for the global sportstech industry. A place where the future isn't just discussed, it's forged.

Inside, you'll find insights on the biggest challenges facing US sports organizations. The report also covers the transformative role of AI in player development, the use of data to drive fan engagement and sponsorship outcomes, and the power of immersive technologies to redefine live experiences.

Innovation is no longer optional. It's mission-critical.

You'll also hear directly from those building the future: leagues rethinking operations, startups tackling critical challenges in performance, content, and commercialization, and investors placing bold bets on what comes next. The most innovative organizations aren't just adopting tools, they're evolving their mindset.

At PEAK, we're not observers of this industry, we're connectors. This report is your preview of the future, and a reminder that the real magic happens when the right people come together in-person.

We're just getting started.

See you out there,



**Chad Wilton**  
Co-founder & CEO,  
PEAK Conference

# MEET THE ALLSTAR INNOVATORS

This Innovators List showcases visionaries who are driving the sport ecosystem growth and success through their leadership of transformative initiatives. We would also like to acknowledge the key contributors to our Sports Organization's survey but chose to remain anonymous.



**Rohn Malhotra**

Co-Founder & Managing Director, SportsTechX



**Andrew Petcash**

Co-Founder & CEO, Profluence Sports



**Iris Cordoba Mondejar**

Managing Director, GSIC



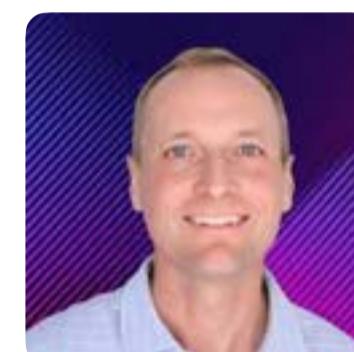
**Matthew Jafarian**

EVP Business Strategy, Miami Heat / Co-founder, 601 Analytics



**David Lewanda**

Director of Baseball Applications, Miami Marlins Teamco



**Kris Hart**

Senior Director, Growth & Ventures, PGA of America



**Sameer Ahuja**

President, GameChanger



**Daniel Shichman**

Co-Founder & CEO, WSC Sports



**Oliver Raison**

Co-Founder, F1 Arcade



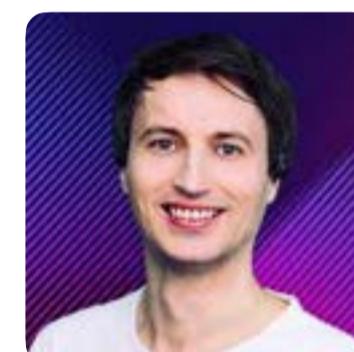
**Leanne Bats**

Head of Digital & Innovation, Sport Waikato



**Jose Gonzalez**

Co-Founder & CEO, Oliver Sports



**Pawel Osterreicher**

Co-Founder & CEO, ReSpo.Vision



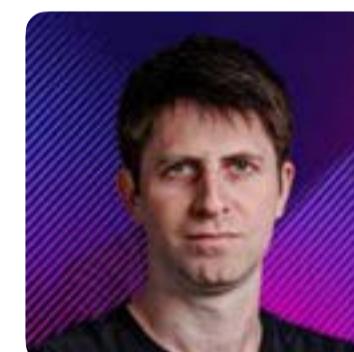
**Mohit Pareek**

Partner, Drake Star



**Jared Shaber**

Senior Vice President, Global Technology Group, Houlihan Lokey



**Zur Karklinsky**

Head of Go-To-Market, DAZN



**Andre Antonelli**

Co-Founder, Machina Sports



**Marilou McFarlane**

SportsTech Startup Advisor & Consultant



**Andy Marston**

Founder & Managing Director, Sports Pundit



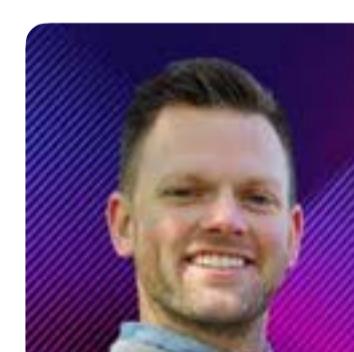
**Javier Altamirano**

Global Head of Startups, SportRadar



**John Stewart**

CEO & Co-Founder, Fastbreak.ai



**Cameron Korab**

Founder, Youth Sports Business Report



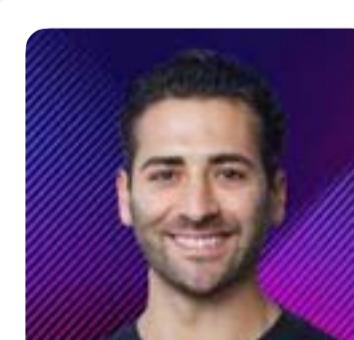
**Geoffrey Cheng**

Investment Manager, Comcast SportsTech, powered by Boomtown Innovation



**Ian Doody**

Co-founder & Managing Partner, Powerhouse Capital



**Cort Post**

Principal, Courtside Ventures



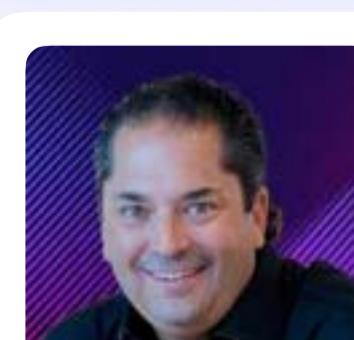
**Ricardo Mazzucca**

Partner & SportsTech Innovation Leader, Arena Hub



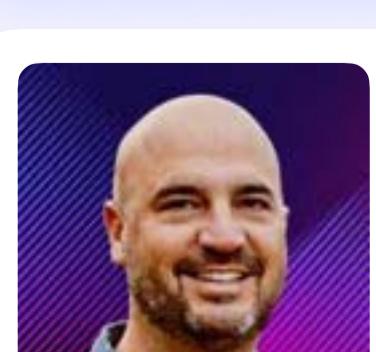
**Joanne Redfern**

Founder, FUTRHOOD Media



**Wayne Kimmel**

Managing Partner, SeventySix Capital



**Jeffrey Hintz**

Executive Director, Sports Tech HQ



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# EXECUTIVE SUMMARY

Our report provides a comprehensive overview of the SportsTech and innovation landscape, highlighting key investment trends, challenges, and opportunities for sports organizations in the USA. Here are some of the key statistics that stood out from our data sources and survey results:

**\$58B**

Global SportsTech Dealflow since 2020-24. \$9.6 B in 2024, and U.S, led with 56% of global investment.

**\$3B**

Napster (previously Infinite Reality) recorded the largest SportsTech investment round ever in January 2025.

**\$1.2B**

All time investment into tech-enabled competitive socialization, where sport meets F&B in immersive, high-energy spaces.

**\$800M+**

Raised by emerging leagues, signaling the momentum behind new IP and format innovation is real.

**#1**

Sports executives rated “Potential Revenue Generation” as the top factor for driving innovation decisions.

**89%**

Rated the challenge of creating personalized, immersive fan experiences as “very” to “critically” important in the next 12 - 24 months.

**3.5**

Average rating (out of 5) of the level of maturity at the organization around innovation.

**82%**

Sports Executives rated "Advanced AI/ Generative AI" as the most exciting emerging technology.

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### PEAK 2026 | The Global Home of SportsTech & Innovation

## SECTION 01

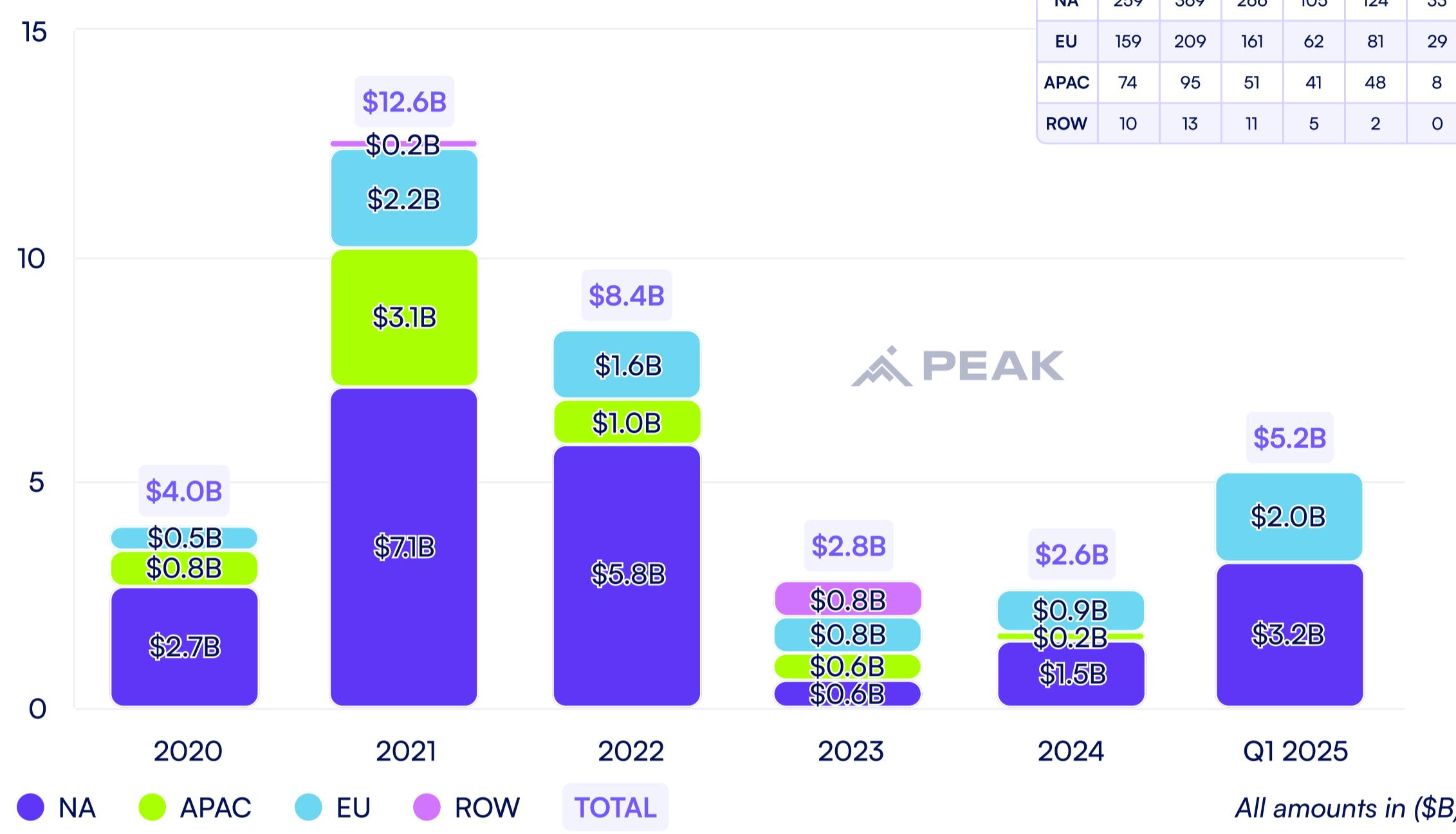
# STATE OF SPORTSTECH

# SECTION 01: STATE OF SPORTSTECH

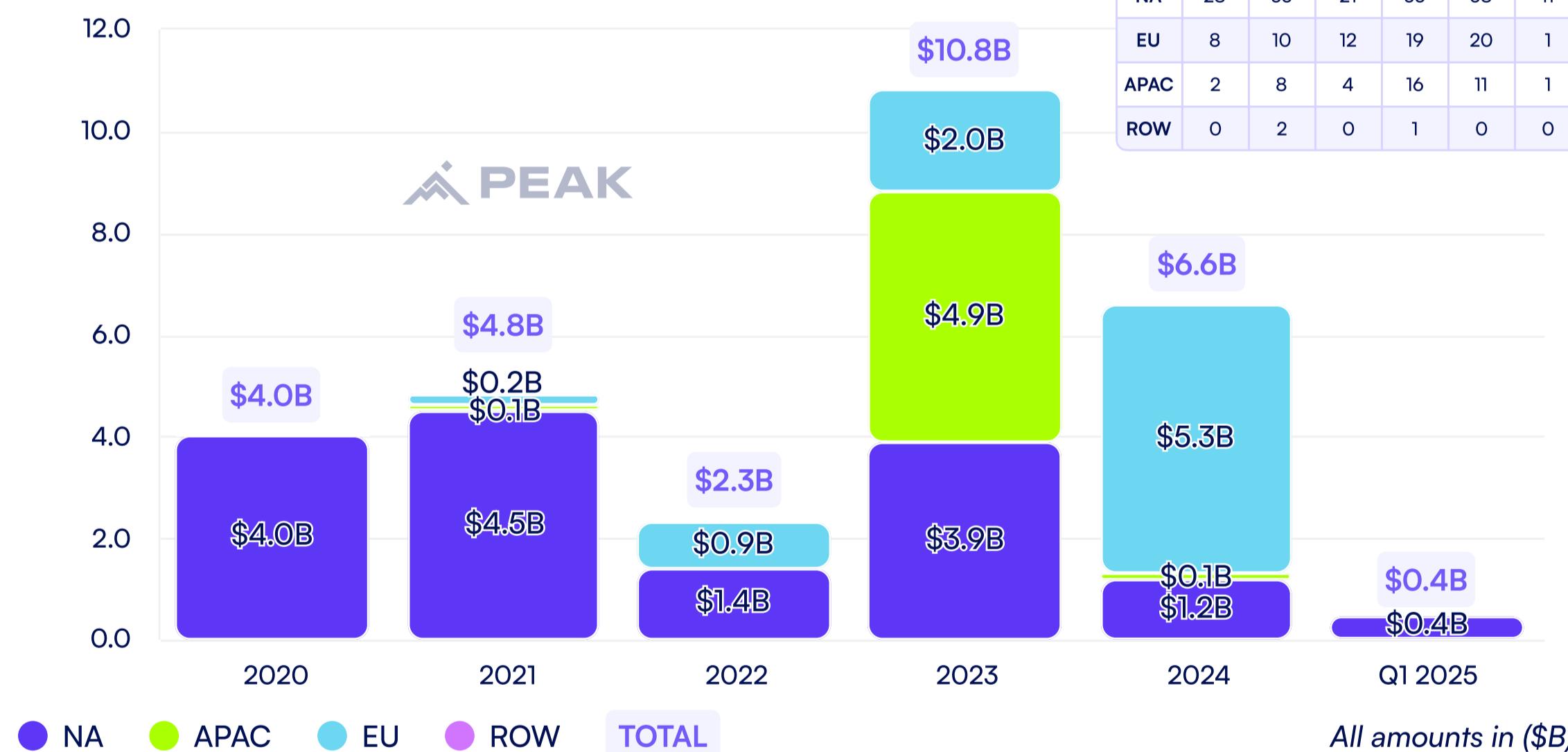
## STATE OF NORTH AMERICAN SPORTSTECH

SportsTechX has recorded \$58B in SportsTech dealflow since 2020, with North America leading in both funding and fan-focused innovation. Momentum is already strong in 2025, with \$5.4B in deals closed in Q1, with Infinite Reality's (now Napster) \$3B raise signaling a new wave of media and metaverse innovation and closing the gap on Fanatics that remains the global all-time funding leader. Fan & Content solutions lead in North American investment rising from 52% since 2020 to 67% in 2024.

### Investment by Region & Year<sup>1</sup>



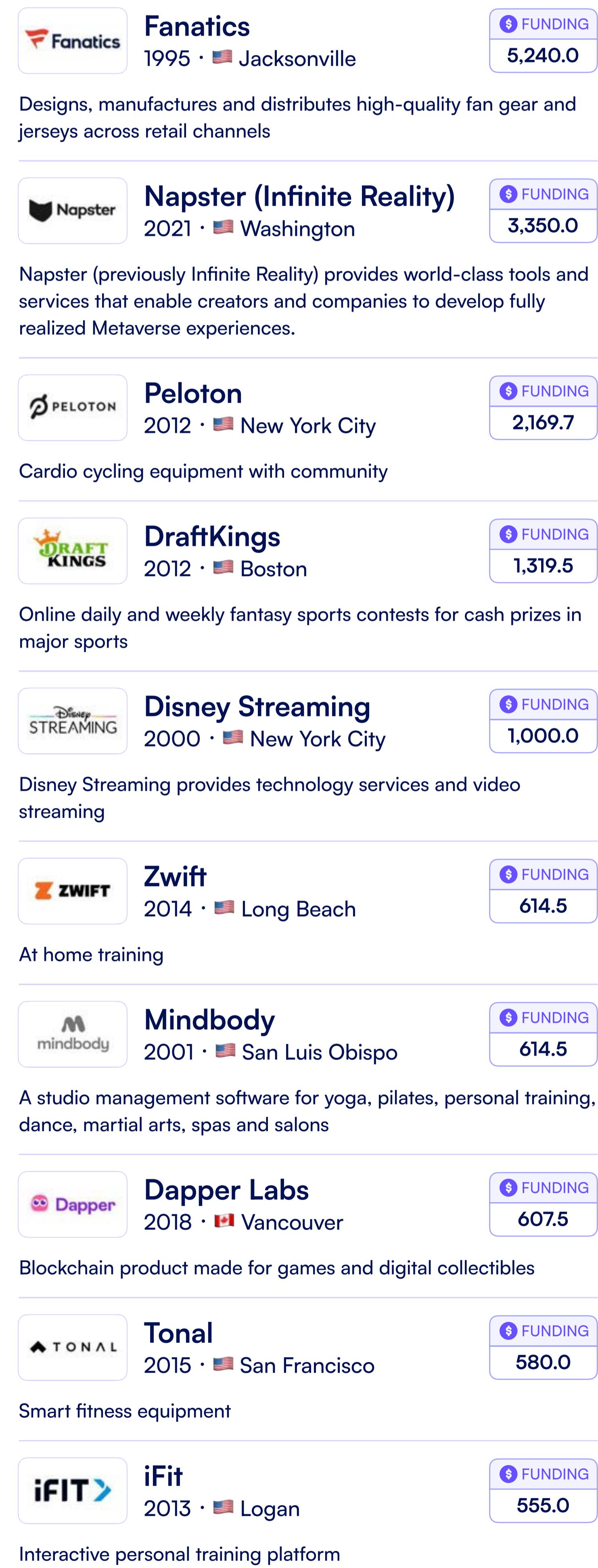
### Mergers & Acquisitions by Region & Year<sup>1</sup>



### Funding Per Sector: North America's Focus on Fans & Content<sup>1</sup>



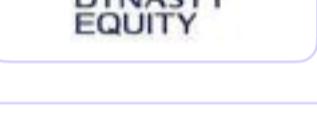
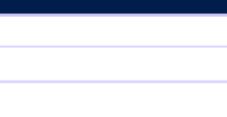
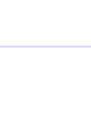
### Most Funded Companies<sup>2</sup>



# SECTION 01: STATE OF SPORTSTECH

# TOP 10 DISCLOSED FUNDING ROUNDS

H1 2025<sup>1</sup>

#	Company	Subsector	Deal Amount	Valuation <sup>1</sup>	Select Investor(s)	PEAK
1	 Napster 	Fans & Content	\$3,000	\$12,250	 Sterling Select JANUARY 2025	
2	 DAZN 	Fans & Content	\$1,827	\$10,000	 SURJ Sports Investment Len Blavatnik FEBRUARY 2025	
3	 Teamworks 	Activity & Performance	\$235	\$1,250	 Dragoneer Investment Group JUNE 2025	
4	 Unrivaled Sports 	Fans & Content	\$120	--	 DICK'S Sporting Goods Dynasty Equity APRIL 2025	
5	 Rocket Youth 	Fans & Content	\$100	--	 ZBS Partners   Daniel Sillman Maverick Carter FEBRUARY 2025	
6	 World Sevens Football 	Sports Competition	\$100	--	 Jennifer Mackesy MARCH 2025	
7	 Unique Sports Group 	Management & Organization	\$100	--	 Velocity Capital Management APRIL 2025	
8	 aescape 	Activity & Performance	\$83	\$230	 Valor Equity Partners MARCH 2025	
9	 Omaha Productions 	Fans & Content	\$75	\$750	 Silver Lake FEBRUARY 2025	
10	 Underdog Fantasy Sports 	Fans & Content	\$70	\$1,230	 Spark Capital MARCH 2025	

## SECTION 01: STATE OF SPORTSTECH

# MAPPING THE SPORTSTECH ECOSYSTEM

### The SportstechX Framework<sup>1</sup>

At PEAK, we're doubling down on the framework developed by SportsTechX because it offers clearly divides SportsTech into three core segments, based on the audience the solution primarily serves.

Each of these pillars are broken down further into sub-sectors, enabling us to go deeper and highlight the technologies that are driving change in specific parts of the industry.



By aligning with this structure, we ensure consistency in how we assess the landscape—giving startups, investors, and enterprise leaders a shared lens to better identify gaps, opportunities, and momentum across the SportsTech ecosystem.

# SECTION 01: STATE OF SPORTSTECH

# USA SPORTSTECH MARKET MAP

🔥 Highlighted companies have raised funding in the last 12 months

🦄 Newly crowned unicorns (\$1B+ in valuation)

## FOR ATHLETES

### ACTIVITY & PERFORMANCE

#### FOR ACTIVITY - HARDWARE

KINEXON	

PEAK

#### FOR ACTIVITY - SOFTWARE


PEAK

#### BEFORE/AFTER ACTIVITY

Puttshack			

PEAK

## FOR FANS

### FANS & CONTENT

#### CONTENT PLATFORMS


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#### FAN EXPERIENCES


PEAK

#### FANTASY SPORTS & BETTING


PEAK

## FOR EXECUTIVES

### MANAGEMENT & ORGANIZATION

#### ORGANIZATIONS & VENUES


PEAK

#### MEDIA & SPONSORS


PEAK

# SECTION 01: STATE OF SPORTSTECH

# USA SPORTS LEAGUE MARKET MAP

With 167 leagues across the USA, the scale and fragmentation of American sports is often underestimated. As technology reshapes how fans engage and monetization evolves, emerging leagues present a generational opportunity: high risk, but even higher upside.<sup>1</sup>

AMERICAN FOOTBALL	PEAK	BASEBALL	PEAK	BASKETBALL	PEAK	COMBAT SPORTS	PEAK
 		 		 		 	
 		 		 		 	
 		 		 		 	
 		 		 		 	
CRICKET	PEAK	EQUESTRIAN	PEAK	EXTREME	PEAK	GOLF	PEAK
 		 		 		 	
ENDURANCE	PEAK			 		 	
 		ESPORTS	PEAK	FISHING	PEAK	 	
 		 		 		 	
 		 		 		 	
ICE HOCKEY	PEAK	MOTORSPORTS	PEAK	OTHER	PEAK	RODEO	PEAK
 		 		 		 	
 		 		 		 	
 		 		PADEL & PICKLEBALL	PEAK	RUGBY	PEAK
		 		 		 	
 		 		 			
SAILING	PEAK	SOCCER	PEAK	TABLE TENNIS	PEAK	TRACK & FIELD	PEAK
 		 				 	
SHOOTING	PEAK			TENNIS	PEAK	VOLLEYBALL	PEAK
 		 		 		 	
 		SOFTBALL & SQUASH	PEAK	 		 	
		 					

<sup>1</sup> Source: Profluence Sports - USA Sports League Market Map. [Link](#)

# SECTION 01: STATE OF SPORTSTECH

# REVENUE BREAKDOWN OF USA SPORTS LEAGUES

UPDATED FOR 2024

The revenue landscape across U.S. sports continues to shift, with every major league posting year-over-year growth in 2024. The NFL remains the financial powerhouse at **\$22.2B**, driven by centralized media deals that account for over 60% of team revenue. MLB reached **\$12.8B**, fueled by strong gains in seating, suites, and sponsorships, despite continued pressure on local media. The NBA climbed to **\$11.6B**, with premium seating again producing the biggest lift.

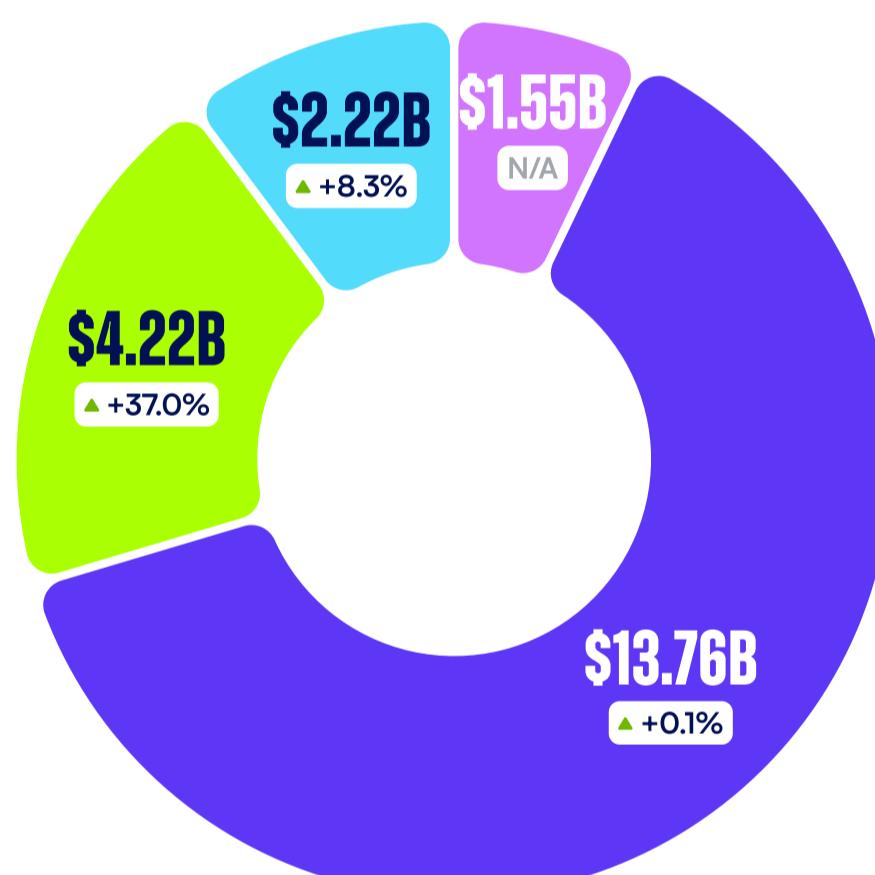
The NHL delivered the fastest growth rate at **10.3%**, supported by a rebound in gameday revenue and stable national deals. MLS crossed **\$2.2B**, up **10%**, with national revenue and sponsorships leading - but with slight declines in concessions and miscellaneous income.

Revenue structure shapes strategic flexibility. Leagues with stronger national media and scalable centralized income - like the NFL and NBA - carry more room to invest in innovation, digital infrastructure, and global growth. Those relying heavily on local media or gameday revenue face growing pressure to modernize their models as consumer habits evolve.

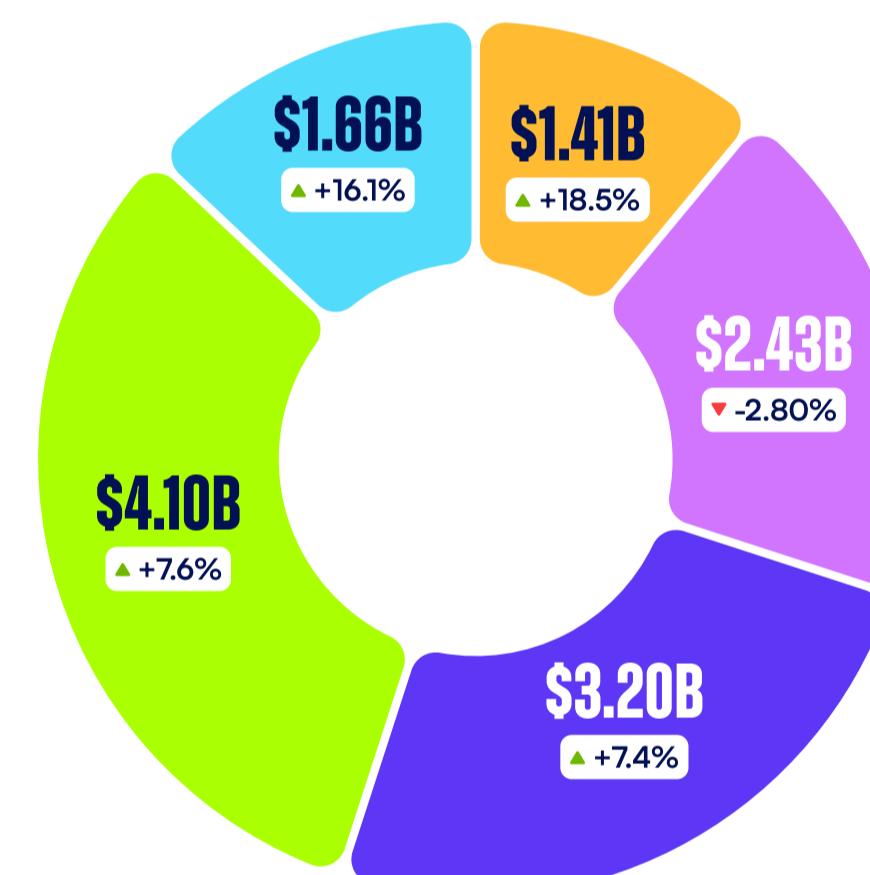
- National Revenue\*
- Seating / Suites
- Team Sponsorships
- Local Media
- Concessions / Parking / Other

\*National revenue is from league media, sponsorships, merchandise, and shared ticket revenue.

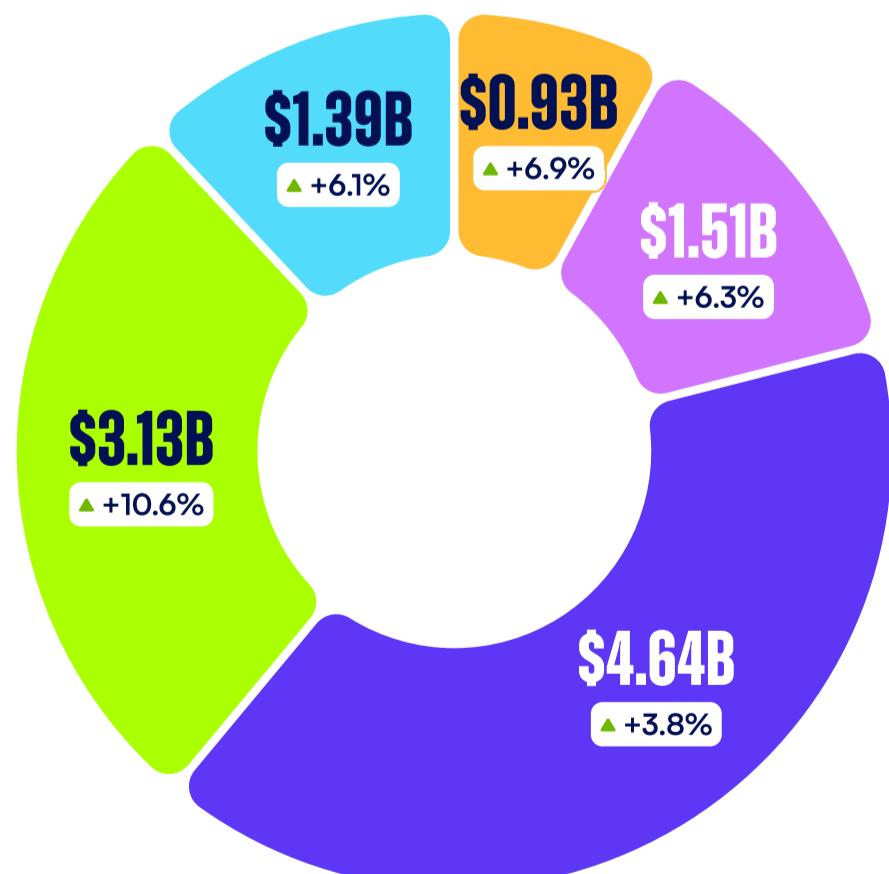
Note: Estimates for what teams generated for 2024 NFL, 2024 MLB, 2024 MLS, 2023-24 NBA & NHL.



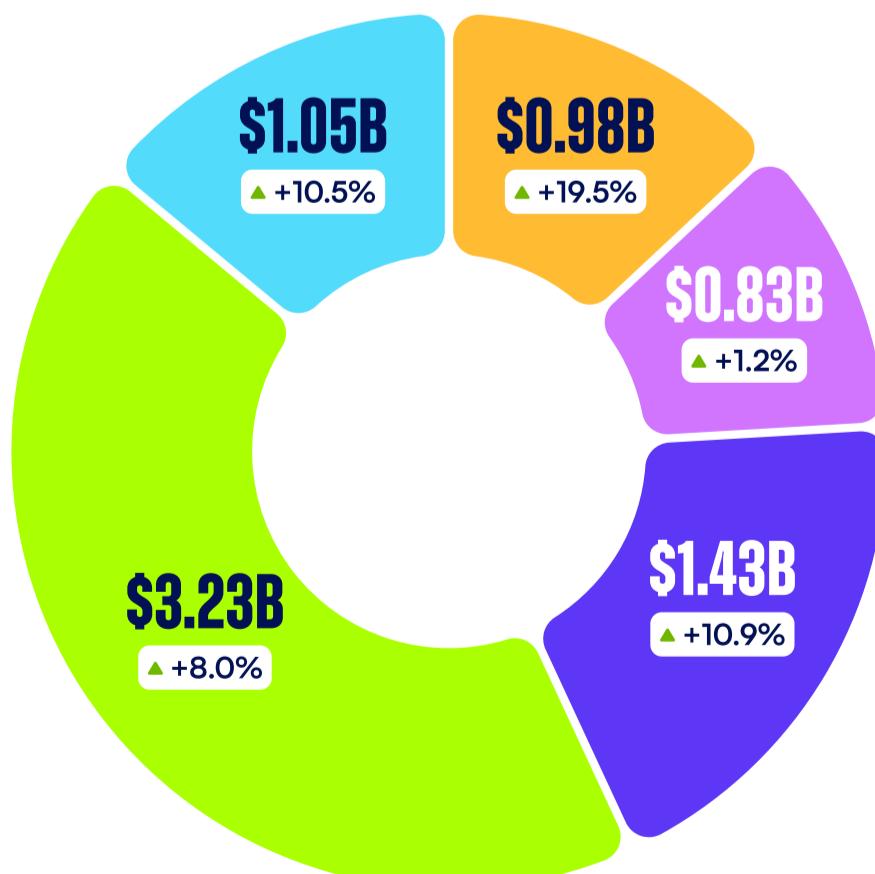
NFL  
Total: \$22.20B  
▲ +8.3% Growth



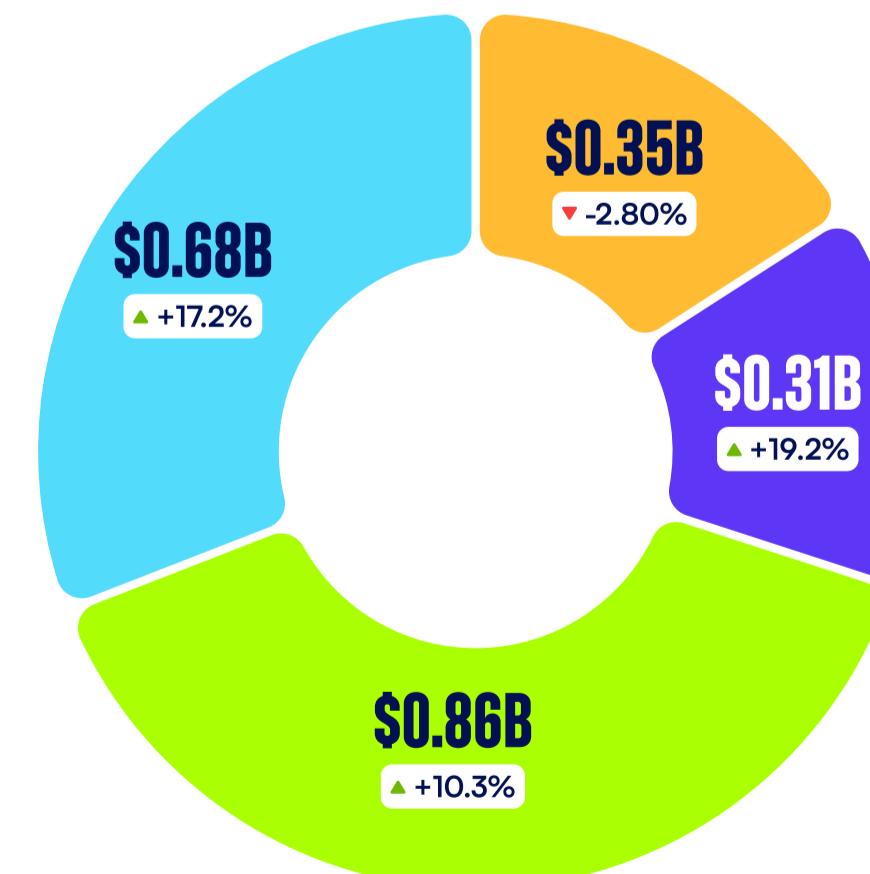
MLB  
Total: \$12.80B  
▲ +7.6% Growth



NBA  
Total: \$11.60B  
▲ +6.4% Growth



NHL  
Total: \$7.50B  
▲ +10.3% Growth



MLS  
Total: \$2.20B  
▲ +10.0% Growth

## SECTION 02

# TOP 5 SPORTSTECH INNOVATION CHALLENGES

## SECTION 02

# TOP 5 SPORTSTECH INNOVATION CHALLENGES

### CHALLENGE 01

Unlocking Revenue Through a Clean Data Room

SOLUTION CASE STUDY



### CHALLENGE 02

Removing Friction to Boost Game-Day Engagement and Revenue

SOLUTION CASE STUDY



### CHALLENGE 03

Attracting the Next Generation of Fans

SOLUTION CASE STUDY



### CHALLENGE 04

Scaling Real-Time Multilingual Engagement

SOLUTION CASE STUDY



### CHALLENGE 05

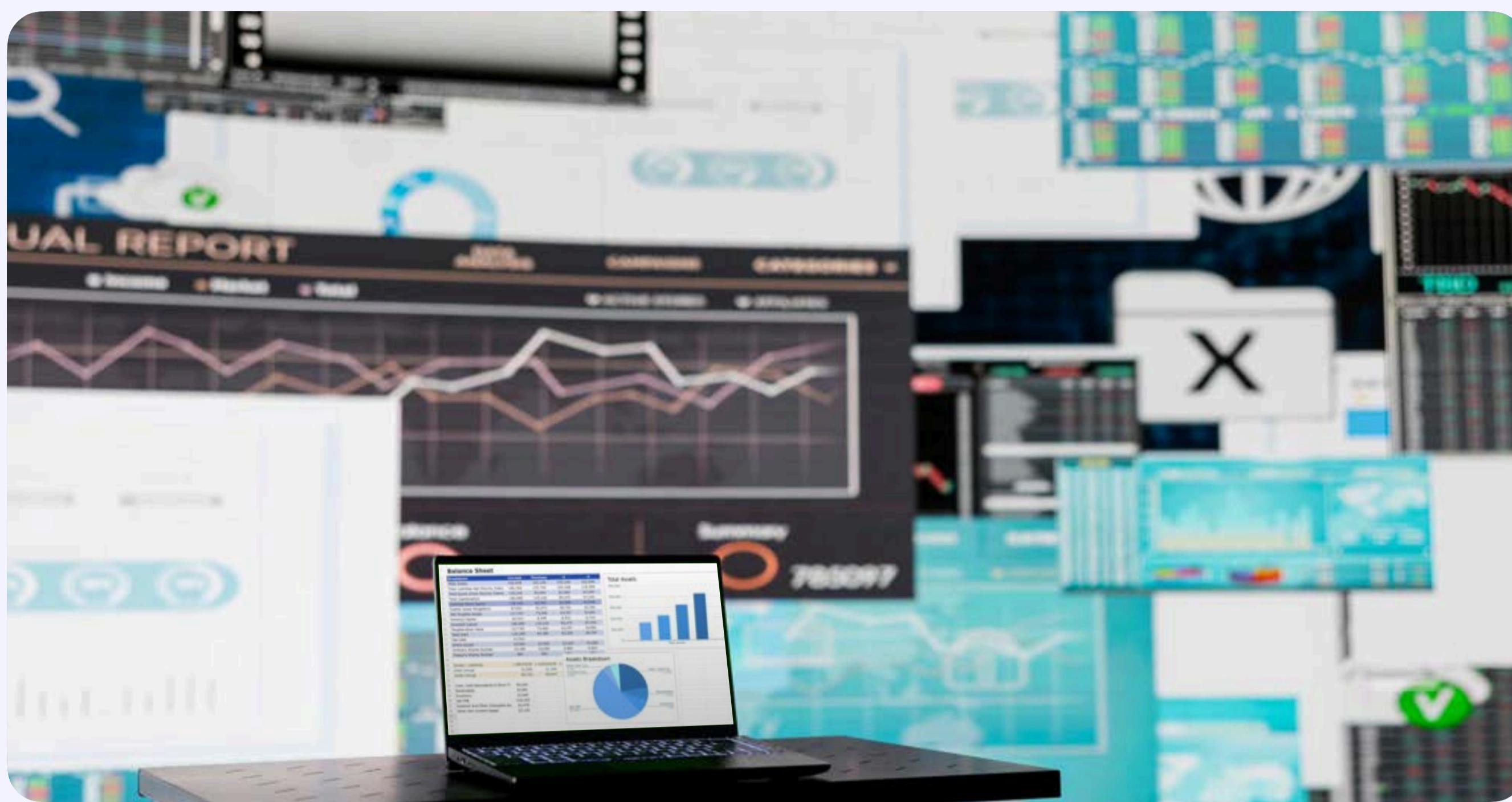
Closing the Operational Gap in Youth and Amateur Sports

SOLUTION CASE STUDY



# Challenge 01: Problem Statement

## Unlocking Revenue Through a Clean Data Room



### PROBLEM STATEMENT

Across ticketing, concessions, ecommerce, and digital engagement, sports organizations sit on a goldmine of first-party data. But without a clean, centralized environment to unify these inputs, most of that value remains untapped.

Legacy infrastructure, vendor lock-in, and siloed systems make it nearly impossible to extract real-time insights or build personalized experiences at scale. As a result, revenue opportunities are lost, and strategic decisions are made without a full picture of fan behavior.

### KEY STATS

- 79% of sports executives told PEAK they lacked a unified first-party data strategy
- 68% said replacing legacy systems and infrastructure was very important in the next 12-24 months.

“Every fan touchpoint creates data, but without a clean and connected environment, it’s just digital exhaust. To truly unlock revenue, you need one source of truth—and the ability to act on it in real time.”

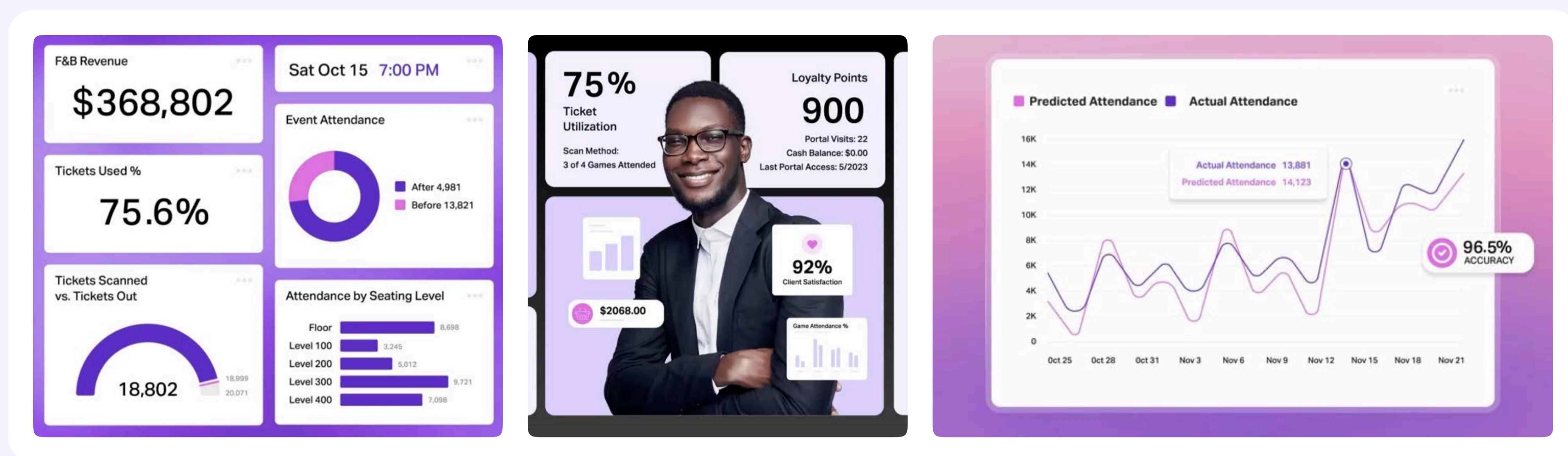
— SVP, Major U.S. Sports Team\*

### KEY CHALLENGES

- Legacy infrastructure limits real-time access and cross-platform data integration
- No centralized environment to unify and analyze ticketing, retail, app, and web data
- Fragmented systems lead to missed upsell and revenue optimization opportunities
- Internal teams lack a single source of truth to guide commercial and marketing strategy
- Data ownership and portability issues when working with multiple third-party vendors

# Challenge 01: Solution Case Study

## Unlocking Revenue Through a Clean Data Room



### Case Study: 601 Analytics — Turning Data into Dollars

#### OVERVIEW

601 Analytics is a centralized data intelligence platform born out of the Miami Heat that enables sports organizations to unify their first-party data across ticketing, retail, concessions, digital touchpoints, and more. By creating a clean data environment and eliminating internal silos, 601 Analytics empowers teams to act on real-time insights, streamline operations, and drive revenue growth through smarter decision-making. The platform has seen rapid adoption - 20% of NBA teams now use 601 Analytics, along with clients in the NFL, NHL, MLB, WNBA, NWSL, and MLS.

#### KEY APPLICATION

The Miami Heat use 601 Analytics to power real-time decisions across their business - from dynamic ticket pricing to predictive staffing and personalized marketing. By integrating multiple data sources into a clean, centralized system, the team has gained a 360-degree view of its fans and operations. This capability allows staff to anticipate attendance, optimize resource allocation, and activate campaigns within hours. The result: greater operational efficiency, stronger fan engagement, and increased profitability.

#### KEY TAKEAWAYS

- A clean, unified data environment is essential to unlocking revenue across modern sports organizations
- Real-time insights enable agile decision-making that boosts efficiency and ROI
- Integrating legacy systems through a centralized layer avoids costly rip-and-replace approaches
- Purpose-built tools like 601 Analytics reduce friction between strategy and execution, enabling teams to act faster and smarter

## Analytics

### 601 ANALYTICS

#### KEY STATS<sup>1</sup>

- 96.5% predictive accuracy on event attendance
- Over \$900K in annual savings on event staffing
- 98% season ticket holder retention

“We created a product that helped the HEAT immensely. It helped us understand at any point in time what's happening in our business. It's like having an app for your business.”

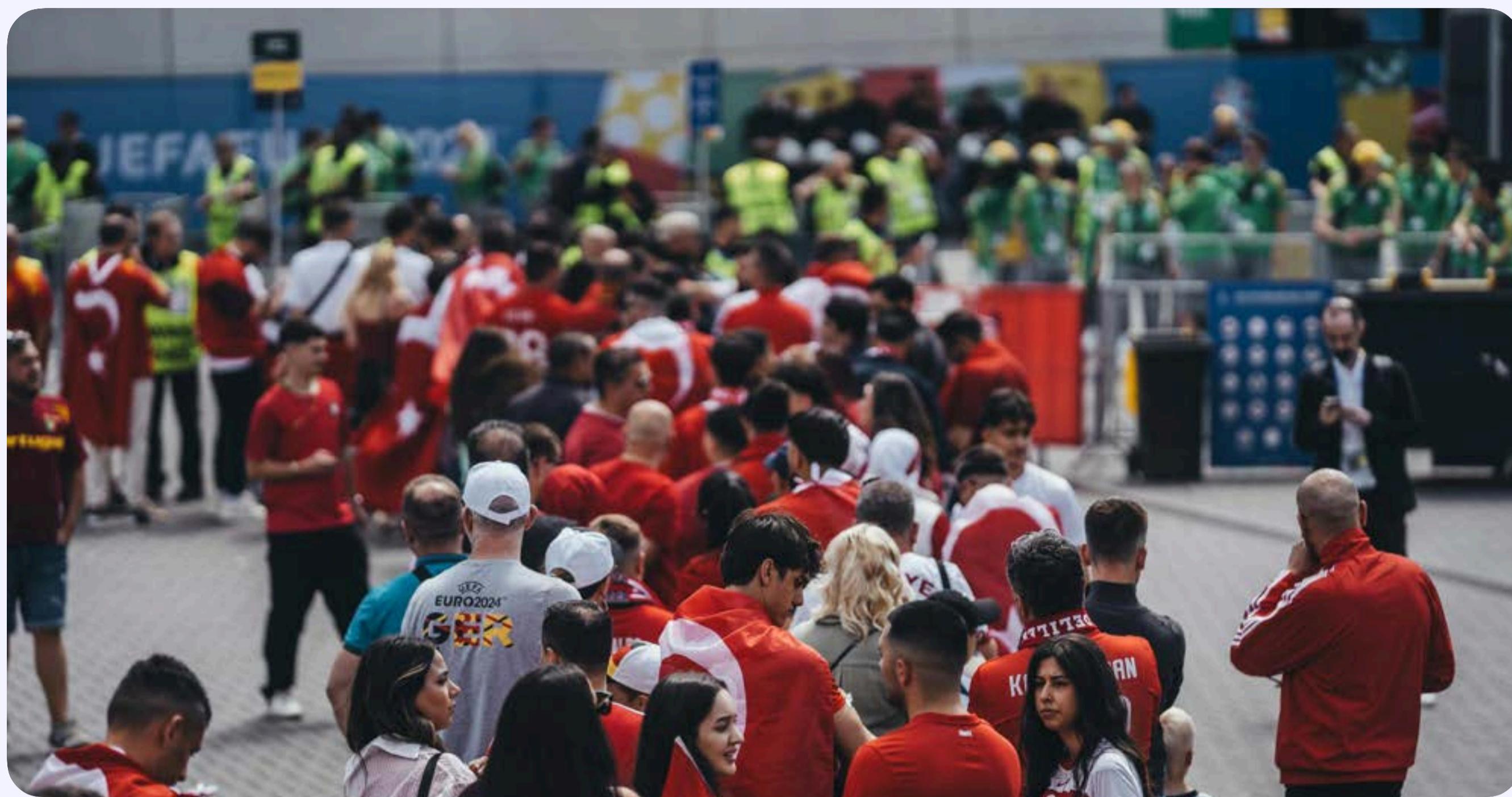


**MATTHEW JAFARIAN**

— EVP Business Strategy,  
Miami Heat / Co-founder, 601  
Analytics

# Challenge 02: Problem Statement

## Removing Friction to Boost Game-Day Engagement and Revenue



### KEY STATS

1 in 3 fans regularly skip food, drinks, or merchandize to avoid missing part of the game<sup>1</sup>

“Friction is the enemy of fan engagement. If we can remove just a few seconds from the buying process, we win back millions in revenue and minutes of game time fans care about.”

— CTO, Major U.S. Sports Team\*

### PROBLEM STATEMENT

As fan expectations rise, sports organizations face mounting pressure to deliver seamless, tech-enabled game-day experiences. But outdated systems, long queues, and disconnected infrastructure continue to hold them back—costing revenue and eroding fan satisfaction. Every interaction—from ticket scans to concessions—is a missed opportunity if it's not frictionless and data-enabled. Without real-time insights and a unified data environment, teams are unable to optimize operations, personalize experiences, or fully monetize the moment.

### KEY CHALLENGES

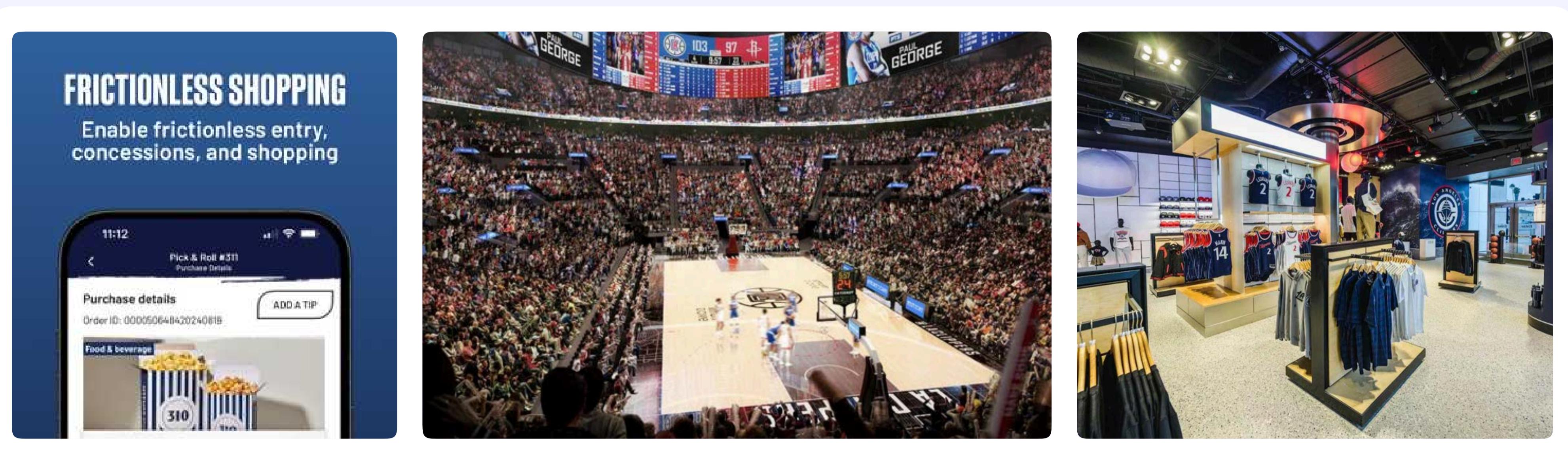
- Long lines and manual transactions reduce spend and hurt fan experience
- Fans often skip purchases to avoid missing the game
- Disconnected systems make it hard to access and act on live data
- Teams lack tools to adjust operations dynamically in real time
- Missed opportunities to personalize offers and boost per-fan revenue

<sup>1</sup> Source: Oracle, Stadium of the Future Report

\* Survey contributor chose to remain anonymous.

# Challenge 02: Solution Case Study

## Removing Friction to Boost Game-Day Engagement and Revenue



### Case Study: AiFi — Invisible Payments That Power Frictionless Fan Experiences<sup>1</sup>

#### OVERVIEW

AiFi delivers autonomous, checkout-free shopping through its AI-powered spatial intelligence platform. Designed for high-traffic venues, AiFi eliminates lines, scanning, and point-of-sale friction by allowing fans to simply walk in, grab items, and leave—charging them automatically. This innovation transforms the in-venue purchasing experience and helps teams unlock more revenue during peak moments.

#### KEY APPLICATION

At the Intuit Dome, home of the LA Clippers, AiFi powers invisible payment stores across 40+ concessions and merchandize outlets that let fans complete purchases in seconds without missing live action. Instead of queueing, fans are automatically identified through mobile authentication and tracked by computer vision, enabling seamless transactions. This reduces congestion, unlocks continuous in-venue revenue and maximizes time spent enjoying the game.

#### KEY TAKEAWAYS

- Invisible payments remove friction and boost per-fan revenue during critical game windows
- Checkout-free systems keep fans engaged in the event rather than waiting in line
- Spatial intelligence allows teams to better understand foot traffic and optimize layout and staffing
- A seamless purchasing experience elevates both fan satisfaction and operational efficiency



AIFI

#### KEY STATS

- 800% increase in checkout speed compared to traditional concessions
- Fans complete purchases in under 10 seconds
- Higher average transaction volume and improved satisfaction scores

"You don't have to take your phone out of your pocket for anything. Parking, security, entry, ticketing, buying alcohol if you're of age, going through one of our frictionless stores to grab a churro, accessing your suite or club - it's all frictionless so you can get to your seat faster and enjoy the game."<sup>2</sup>



GEORGE HANNA

— CTO, LA Clippers / Intuit Dome

<sup>1</sup> Source: [AiFi](#) and [American Banker](#), LA Clippers Deploy Checkout-Free Payments at Intuit Dome.

<sup>2</sup> Source: [Fast Company](#), A Sneak Peek at the Intuit Dome's Game-Changing Halo Board. [Link](#)

# Challenge 03: Problem Statement

## Attracting the Next Generation of Fans



### KEY STATS

In our survey of sports executives, 89% said creating personalized and immersive fan experiences is a very important technological challenge they are aiming to address in the next 12-24 months.

#### PROBLEM STATEMENT

Sports organizations are competing for attention in a crowded digital landscape, where Gen Z and younger audiences are consuming content in entirely new ways. Traditional game-day formats and linear broadcasts often fail to capture their interest, especially among fans without a deep-rooted connection to the sport. To stay relevant, rights holders, teams, and leagues must reimagine how they engage the next generation—meeting them where they are, with experiences that are social, immersive, and culturally resonant.

“For the next generation, the game is just one part of the show. Our product has to be the entire social experience surrounding it, and that experience must be more compelling than the infinite scroll on their phone.”

— VP, Fan Experience, Major U.S. Sports League\*

#### KEY CHALLENGES

- Legacy fan experiences don't resonate with younger, mobile-first audiences
- Gen Z expects interactivity, personalization, and on-demand content
- New fans lack context or deep knowledge of the sport, making onboarding difficult
- Traditional formats don't align with how younger fans discover or engage with content
- Many organizations lack the data and feedback loops to measure and iterate youth-focused initiatives

# Challenge 03: Solution Case Study

## Attracting the Next Generation of Fans



### Case Study: F1 Arcade — Capturing Next-Gen Fans Through Competitive Socialization

#### OVERVIEW

F1 Arcade ignites fan passion by fusing high-fidelity full-motion sim racing, live Grand Prix viewing, and premium social settings into vibrant venue experiences powered by rFactor 2. Crafted to convert casual participants into dedicated fans, F1 Arcade launched its flagship London location in late 2022 and has since expanded to major U.S. cities—including Boston, Washington D.C., Philadelphia, plus Denver opening in August, Las Vegas in October and Atlanta in November - consistently drawing a digitally native, under-35 audience.

#### KEY APPLICATION

At its core, F1 Arcade offers a gamified racing ecosystem where leaderboards, XP points, and team battles create friendly competition and instant engagement—regardless of a visitor's prior interest in racing. Designed to be accessible to both casual fans and hardcore gamers, experiences are tiered from rookie to elite skill levels. The venues serve as social-first hubs—ideal for birthdays, nights out, or corporate gatherings—with DJs, cocktails, and premium design seamlessly blending cultural crossover with high-speed action. This holistic environment drives brand conversion: 70% of London visitors were new to F1, and over 50% of U.S. bookings come from adults under 35. The venues act as immersive entry points for first-time fans and entertainment destinations for established F1 fans—introducing new demographics to the sport in an unforgettable format.

#### KEY TAKEAWAYS

- Gamified racing creates immersive, competitive fan experiences that build emotional connection
- Tiered accessibility invites all skill levels, removing barriers for first-time F1 participants
- Social-first venue design drives group visits, longer dwell times, and repeat engagement
- Cultural crossover format introduces F1 to new, younger audiences beyond traditional channels



F1 ARCADE

#### KEY STATS

- 750,000+ visitors to the London venue since its opening
- 70% of London guests were casual or first-time F1 fans
- 50%+ of U.S. bookings are made by adults under 35

“F1 Arcade is about reimagining how fans discover and engage with the sport. We've created something immersive, social, and accessible — a true entry point for new audiences who might never have watched a race. It's not about replicating F1, it's about translating its energy into something you can feel and be part of.”



OLIVER RAISON

— Co-Founder, F1 Arcade

# Challenge 04: Problem Statement

## Scaling Real-Time Multilingual Engagement



### PROBLEM STATEMENT

As more rights holders and broadcasters invest in direct-to-consumer platforms, delivering real-time, localized, and interactive fan experiences has become a core competitive priority. But, scaling gamified content - like quizzes, polls, and live commentary - across multiple languages introduces complex challenges in speed, accuracy, and cultural relevance. Without advanced multilingual capabilities, organizations risk delivering generic or delayed experiences that fail to meet rising fan expectations.

### KEY STATS

82% of international fans feel 'more connected and engaged' with a live match when content is in their native language.

"As we scale our fan engagement activities globally during the FIFA Club World Cup, ensuring fans feel connected and constantly engaged - no matter the language and cultural context - is critical. Achieving that in real time while staying connected to what happens in the game requires a very specific kind of technology."



**ZUR KARKLINSKY**

— Head of Go-To-Market,  
DAZN

### KEY CHALLENGES

- Delivering real-time engagement across 10+ languages and regions
- Ensuring content accuracy, tone, and cultural nuance at scale
- Integrating multilingual features into live digital and OTT experiences
- Scaling without ballooning content and moderation teams
- Competing with global platforms that are already personalized and hyperlocal

# Challenge 04: Solution Case Study

## Scaling Real-Time Multilingual Engagement

### Case Study: DAZN x Machina Sports: FIFA Club World Cup FanZone

#### OVERVIEW

Machina Sports empowers broadcasters like DAZN to deliver real-time, gamified fan engagement in multiple languages through AI content agents purpose-built for sports. The platform ingests competition statistics and news, instantly transforming them into localized quizzes, polls, commentary, and dynamic images. For global broadcasters serving diverse fan bases, this approach dramatically increases scalability, accuracy, and speed of content creation.

#### KEY APPLICATION

Ahead of the FIFA Club World Cup, DAZN integrated Machina Sports' AI agents into its FanZone platform to produce multilingual content experiences on demand. Event moderators used a custom-built dashboard to generate quizzes and polls that reflected teams' and players' latest news and competition results, complete with localized context for each region. The system successfully reduced manual production time and enabled tailored engagement for fans from Brazil to Japan without compromising accuracy or speed.

#### KEY TAKEAWAYS

- AI agents allow sports broadcasters to scale personalized fan content across languages in real time
- Gamified features like quizzes and polls increase second-screen engagement during live matches
- Contextual activations generate significantly higher engagement rates, especially when delivered in-game
- Localization tools ensure content resonates with regional audiences while maintaining editorial control
- Reduces operational load on moderators and boosts platform stickiness during key moments

“Live sports moves fast, so should the content. With DAZN, we proved that it is possible to deliver personalized, multilingual fan experiences on demand, powered entirely by AI. This is the future of global fan engagement.”

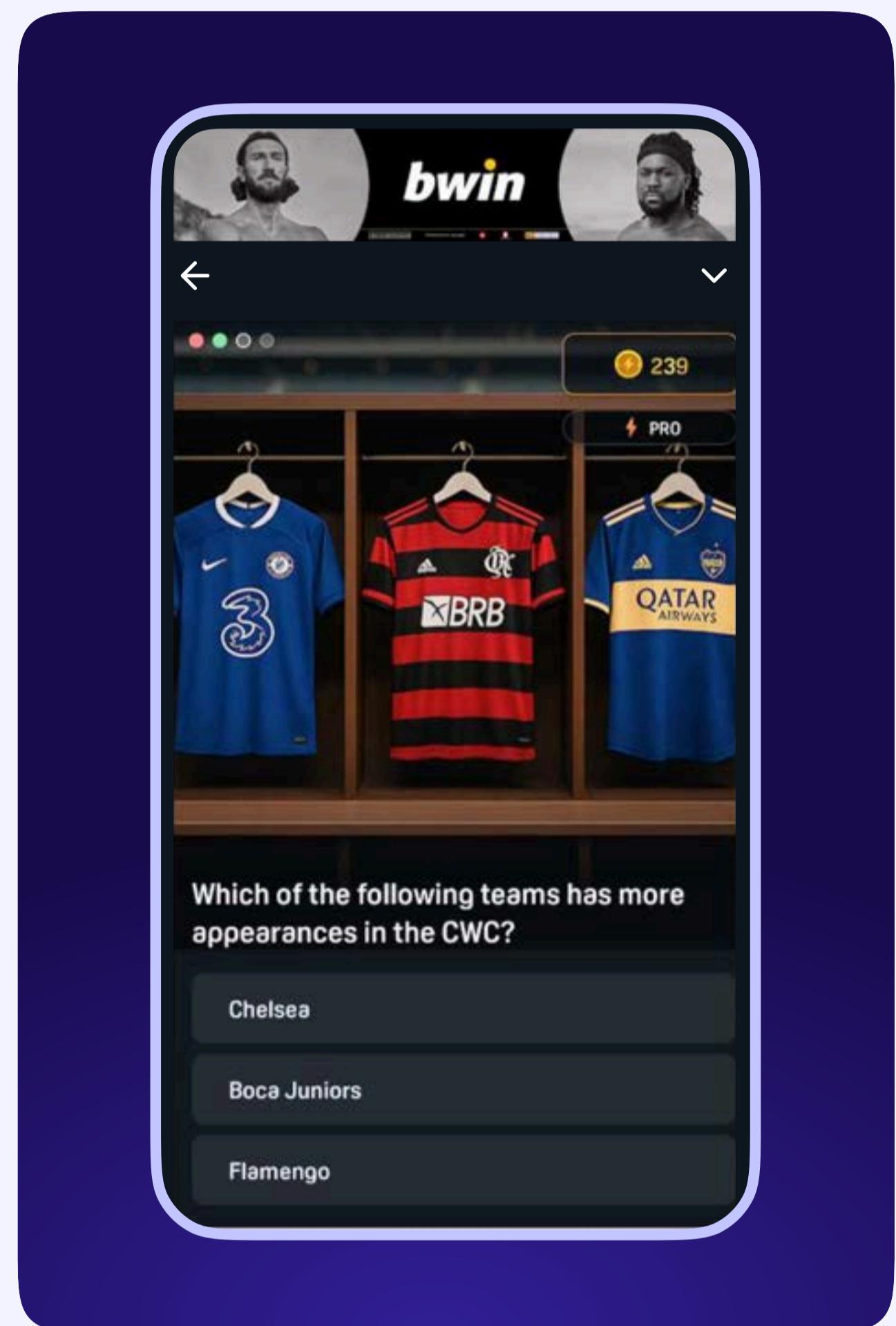


ANDRÉ ANTONELLI

— Co-Founder, Machina Sports



DAZN X MACHINA SPORTS

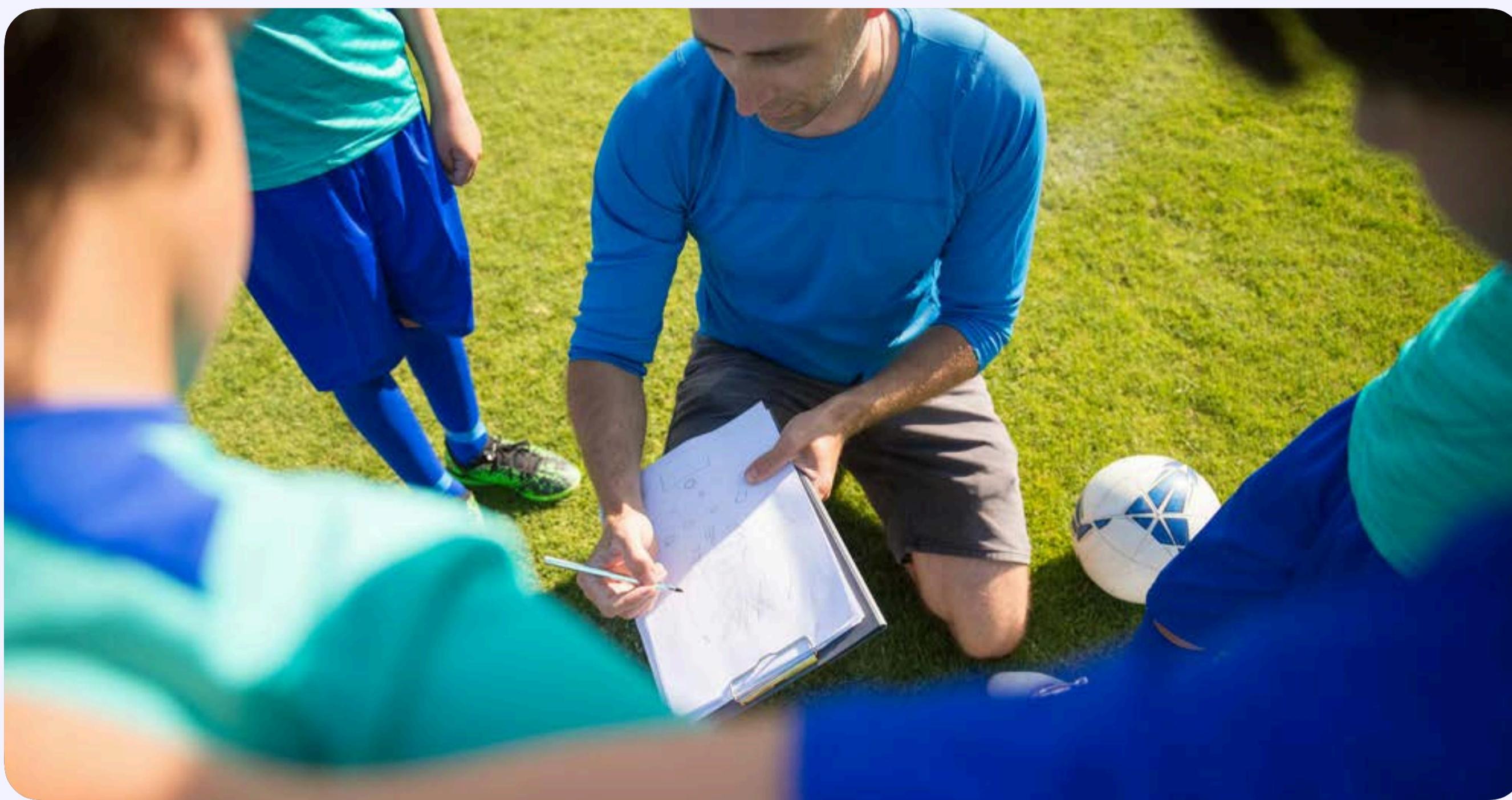


#### KEY STATS

- Used across 11 languages with always-fresh, localized content updates
- Enabled creation of real-time gamified content synced to match and competition events
- Delivered multimodal AI-generated text and images on demand

# Challenge 05: Problem Statement

## Closing the Operational Gap in Youth and Amateur Sports



### KEY STATS

In our industry survey, “Budget constraints” was the #1 blocker for youth and emerging sports organizations implementing innovative solutions

“At the youth level, we’re still managing games with paper rosters and group texts. It’s holding back coaches, players, and parents from getting the most out of the experience.”

— High School Athletic Director, USA\*

### PROBLEM STATEMENT

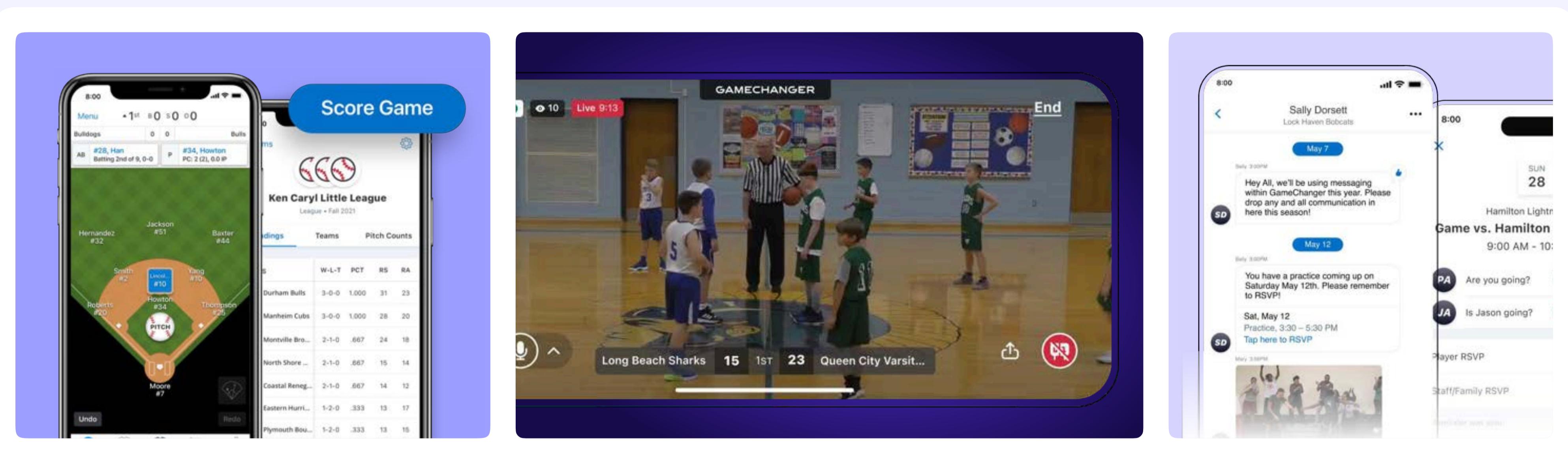
While youth and amateur sports are experiencing record levels of participation, they remain underserved by digital infrastructure. Coaches juggle admin work with training. Parents struggle to stay informed. Players miss out on feedback and visibility. Without scalable, mobile-friendly tools, these organizations are stuck relying on outdated systems that limit performance, communication, and engagement.

### KEY CHALLENGES

- Coaches spend hours managing logistics instead of developing athletes
- Families lack access to real-time updates or live content from games
- Players receive little to no performance data to support their growth
- Scouts and recruiters have limited visibility into non-elite athletes
- Fragmented systems make it hard for leagues to operate efficiently

# Challenge 05: Closing the Operational Gap in Youth and Amateur Sports

## SOLUTION CASE STUDY



## Case Study: GameChanger — Powering Grassroots Sports with Pro-Level Insights

### OVERVIEW

GameChanger provides youth sports teams with professional-grade tools for scorekeeping, video streaming, scheduling, and statistics. Its mobile-first platform simplifies how coaches, families, organizations, and players capture, view, and experience youth sports. By lowering the barrier to access meaningful stats and visuals, GameChanger turns grassroots participation into a more connected, data-driven experience.

### KEY APPLICATION

GameChanger empowers over 1 million teams, covering nearly 9 million games annually, with live streaming, scorekeeping, and team management. Notably, MLB's multiyear partnership integrates official youth events (like RBI World Series, All American Game) with GameChanger's platform—complete with live data and highlights that surface on MLB Network and MLB.com.

With 4.5 million hours of livestreaming video and 9 million unique active users, GameChanger not only enhances community engagement, but also supports talent development.

### KEY TAKEAWAYS

- GameChanger empowers grassroots coaches with pro-style tools for performance and planning
- Livestreaming and real-time updates increase engagement among remote families and fans
- Smartphone-enabled tools eliminate barriers so teams no longer need expensive equipment or software to capture and analyze gameplay
- Enhanced visibility helps young athletes track progress and stay motivated
- MLB partnership reinforces credibility: Trusted by the sport's top league, GameChanger scales innovation to the grassroots level



GAMECHANGER

### KEY STATS

- 100% of top 50 2025 MLB Draft prospects had games covered by GameChanger during their youth careers
- Over 1 million teams use GameChanger annually across various sports
- Over 9 million unique active users in 2024
- Over \$100MM in sales in 2024

“We created GameChanger to help coaches and parents stay connected to the games that matter most each week—their kids’ games. And it’s worked. In the entire history of Major League Baseball, there have been about a quarter of a million games. Last year alone, nearly nine million games were covered on our platform.”



SAMEER AHUJA

— President, GameChanger

## SECTION 03

# EXECUTIVE INSIGHTS

## SECTION 03: EXECUTIVE INSIGHTS

# WHAT DRIVES INNOVATION FOR SPORTS ORGANIZATIONS?

We asked sports organizations to share their top three factors for driving innovation decisions:

### 01 Potential Revenue Generation

The #1 driver behind new innovation initiatives is the potential to unlock fresh, sustainable revenue. Whether it's launching sponsorable fan programs, optimizing ticket sales messaging, or building internal CRM tools that outperform off-the-shelf platforms, the focus is squarely on return on investment. This includes monetizing underutilized fan data, creating digital assets that brands want to sponsor, and developing tech that directly impacts sales, retention, or frequency of engagement.

### 02 Fan Impact

For sports organizations, everything begins and ends with the fan. Innovation is seen as the lever to elevate the fan experience, from the parking lot to the post-game recap. That means removing friction (e.g. entry lines, clunky apps), building moments of surprise and delight, and using technology to make each touchpoint feel personal. Creating an emotional connection isn't just good for engagement, it also drives loyalty, spend, and advocacy.

### 03 Brand Value

Long-term relevance demands strategic vision. Innovation plays a central role in shaping a team's identity - not just today, but five, ten, fifteen years from now. That means taking calculated risks, aligning tech with core values, and ensuring the entire organization is pulling in the same direction. For many teams, brand value isn't just about aesthetics or media buzz, it's about operationalizing a legacy of excellence through strategic innovation.

### Others

- Cost involved
- Vendor credibility
- Timeline
- First-mover advantage
- Potential cost savings
- Competitor adoption



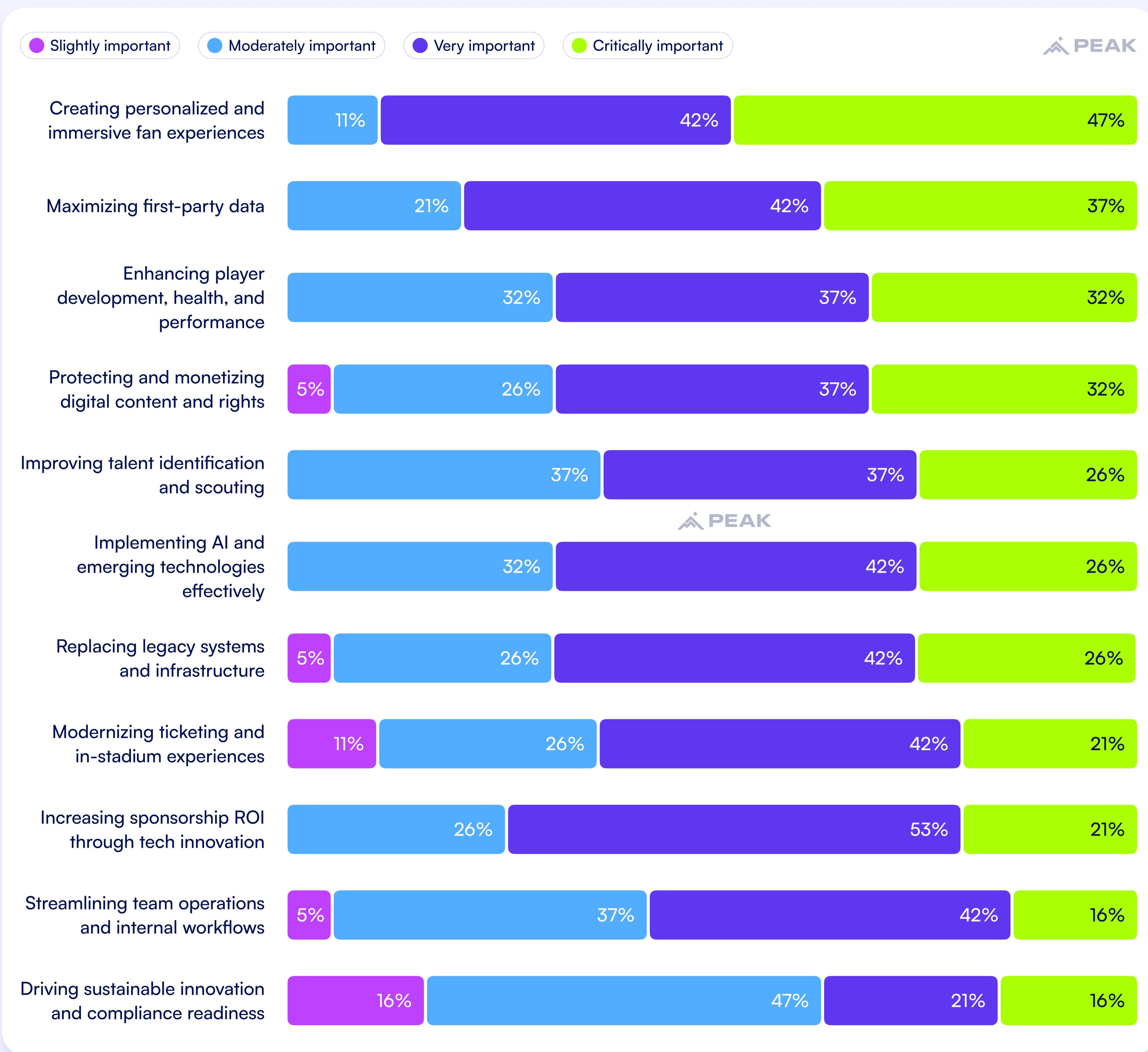
“Our innovation strategy is ultimately about generating new revenue — but we get there by prioritizing fan engagement and continuously improving the product to deliver a better experience.”

— VP of Innovation at Pro Sports League\*

## SECTION 03: EXECUTIVE INSIGHTS

# FUTURE TECHNOLOGY CHALLENGES

We asked sports organizations to evaluate how crucial these technology challenges are to solve within the next 12–24 months.

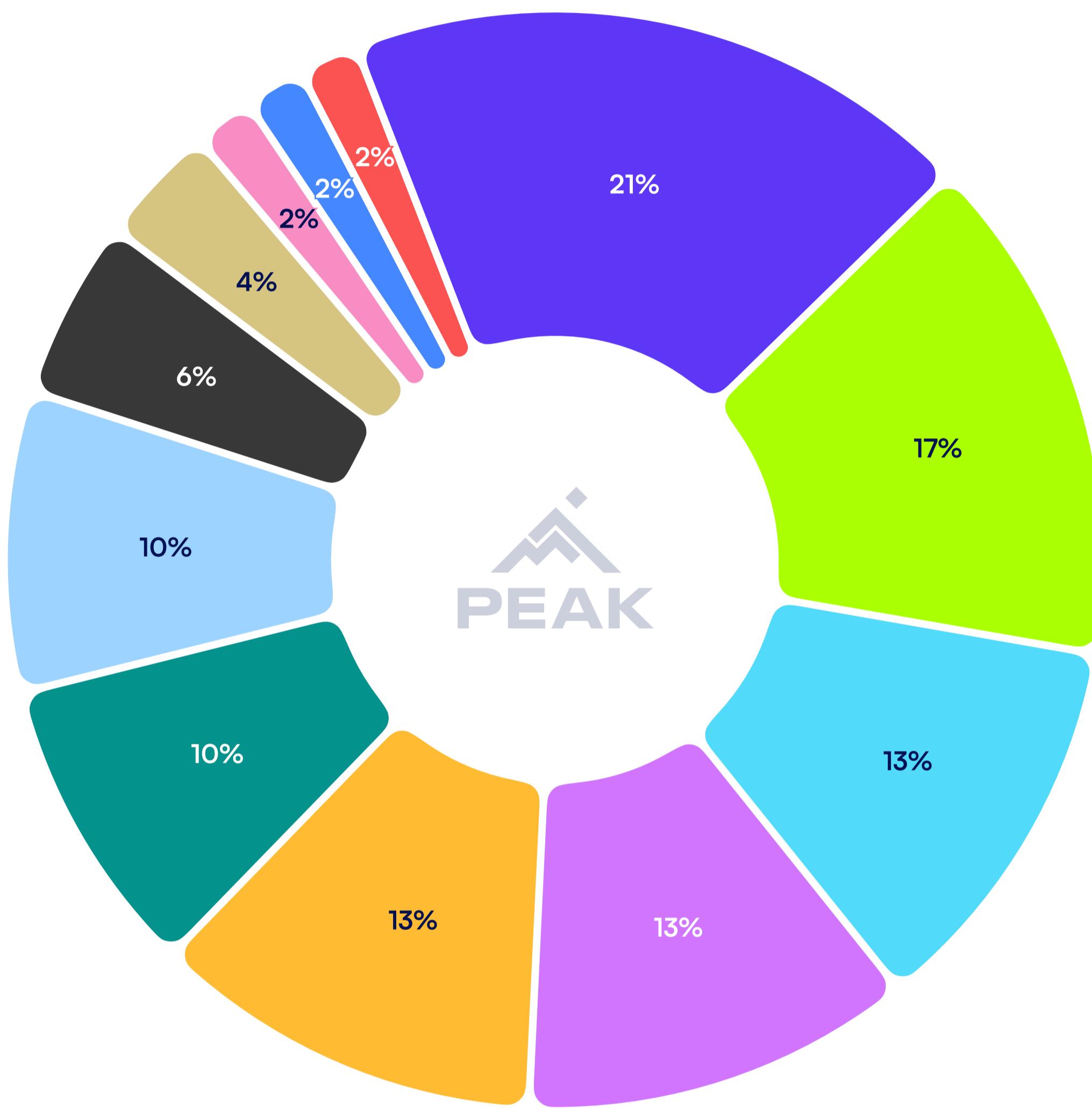


## SECTION 03: EXECUTIVE INSIGHTS

# IMPLEMENTATION CHALLENGES

What are sports organization's main blockers in implementing tech innovation?

21% Time and Effort Required
17% Internal Alignment Across Departments
13% Budget Constraints
13% Change Resistance
13% Cost-to-Value Concerns
10% Stakeholder Buy-in
10% Legacy Systems / Processes
6% Lack of Qualified Partners / Vendors
4% Prioritization Challenges
2% Lack of Access to The Right Technology
2% Governance Issues
2% Seasonality of The Business



### Leagues

CORE CONCERN ARE:

- Cost-To-Value Concerns
- Internal Alignment Across Departments
- Time And Effort Required

### Teams

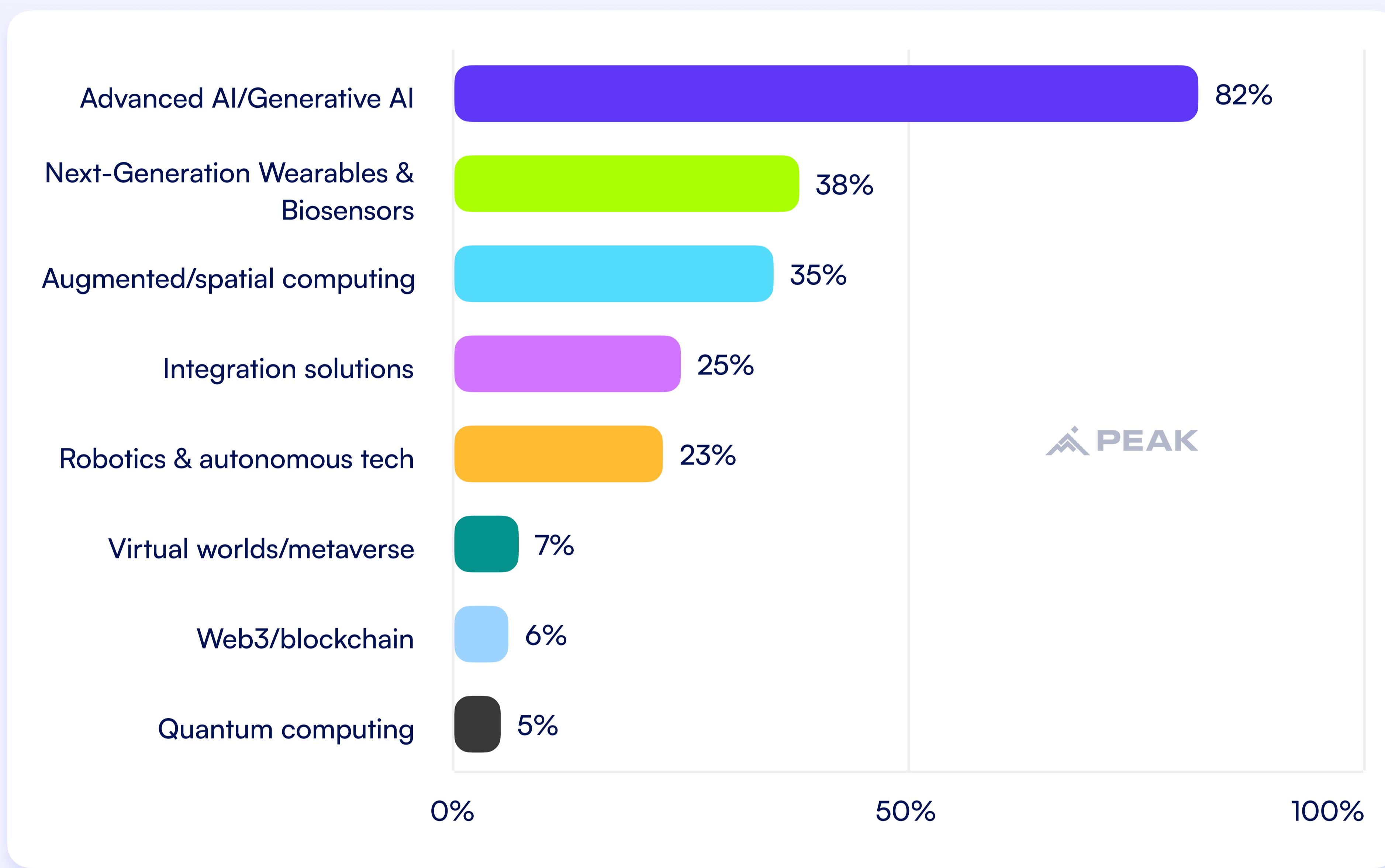
CORE CONCERN ARE:

- Time And Effort Required
- Change Resistance
- Internal Alignment Across Departments

## SECTION 03: EXECUTIVE INSIGHTS

# FUTURE SPORTSTECH PREDICTIONS

These are the most exciting emerging technologies identified by sports organizations, with Advanced / Generative AI the leader by some way.



“AI is reshaping how professional sports operate, from schedule creation to fan engagement to media valuation. We’ve moved beyond rule-based logic. AI now understands what makes a great schedule and can anticipate what broadcasters, teams, and fans want in each market. As media distribution becomes less linear, we’ll see AI help leagues deliver more compelling, personalized experiences that make each season more engaging and relevant to fans.”



**JOHN STEWART**

— CEO and Co-Founder, Fastbreak AI

“Sports organizations that treat data as a strategic asset - and combine AI driven insight with open collaboration, especially with startups - will unlock a new era of personalized, planet friendly fan experiences and high performance decision making.”



**IRIS CÓRDOBA MONDÉJAR**

— Managing Director, GSIC powered by Microsoft

## SECTION 02: EXECUTIVE INSIGHTS

# KEY TAKEAWAYS

### 01 Organizational Alignment and Change Management

While budget and timelines are often cited as surface-level obstacles, the more persistent challenge lies within organizational dynamics. Many sports organizations struggle to align internal stakeholders around a unified vision. Innovation efforts often stall due to departmental silos, inconsistent leadership buy-in, or strategies that fail to move beyond high-level messaging. Ensuring every team, from marketing to operations, is working toward the same strategic goals remains a critical hurdle.

### 02 Legacy Systems and ROI Pressure

Legacy infrastructure continues to hinder progress. Outdated systems, siloed data environments, and limited platform interoperability make it difficult for organizations to deploy modern solutions. Executives face mounting pressure to demonstrate clear returns on any technology investment. As a result, the ability to integrate new tools while maintaining business continuity, and proving value quickly, has become a key focus for innovation leaders.

### 03 Resource Constraints and Execution Bandwidth

A consistent theme across interviews and survey data was the scarcity of time, talent, and funding. Many teams operate with lean resources and must prioritize ruthlessly. This environment makes it difficult to test new solutions or pilot emerging technologies, even when the strategic will is there. Innovation is no longer just about ideas. It's about operational execution under pressure.

## SECTION 04

# SPORTS INNOVATION TRENDS

## SECTION 04: SPORTS INNOVATION TRENDS

# CHANGING MEDIA LANDSCAPE: SOCIAL MEDIA IS THE NEW STADIUM

Sports consumption is no longer limited to TV screens or in-venue attendance. Today, social media is where fans watch, react, share, and connect. Platforms like Instagram, YouTube, and TikTok have become the front row—especially for younger, mobile-first audiences.

### KEY TRENDS DRIVING THE SHIFT:

#### Social-first is fan-first

Over 50% of global fans now follow sports through platforms like Facebook (51%), YouTube (46%), Instagram (31%), and Twitter (25%).

#### Shorter, faster, everywhere

The average video length from over 550 sports organizations using WSC Sports has dropped 24% in just two years—now averaging only 70 seconds.

#### Content is accelerating

Teams and broadcasters are producing up to 10x more content per year to keep up with fragmented fan attention and platform demands.

#### Gen Z prefers the snippet

23% of Gen Z fans say they prefer short-form, bite-sized highlights over full games or long recaps.

“Social isn’t just the new stadium, it’s the new front row. Fans want more than highlights; they want experiences. They expect to be part of every goal, pass, and play as it happens. If your content isn’t fast, emotional, and built for the scroll, you’re nowhere near the stadium.”



DANIEL SHICHMAN

— Co-Founder & CEO, WSC Sports

#### Average video length

01:10

92.8  
SECONDS

2020

84.1  
SECONDS

2022

70.9  
SECONDS

2024

Source: WSC Sports<sup>1</sup>

## SECTION 04: SPORTS INNOVATION TRENDS

# THE OLD GUARD VS. THE NEW WAVE

The American sports landscape is a tale of two worlds. On one side, financial titans like the NFL generate staggering revenues, building digital empires on the back of decades of dominance. On the other, a new class of challenger leagues is rewriting the playbook, prioritizing digital engagement, format innovation, and niche communities to fuel explosive growth. This is the story of scale versus velocity.

**\$20B+**

NFL Annual Revenue



**414B**

NBA Annual Social Impressions



**+322%**

WNBA Search Interest Growth (YoY)



The undisputed financial king.

A global social media powerhouse.

The fastest-growing sports property online.

### THE CHALLENGER PLAYBOOK

#### 1. Format Innovation

Re-engineering sports for short attention spans. Faster, more telegenic, and optimized for social media highlights (e.g. TGL, BIG3, 3ICE).

#### 2. Athlete Empowerment

Positioning athletes as founders and partners, leveraging their personal brands for authentic marketing (e.g., Unrivaled, Grand Slam Track).

#### 3. Digital-Native Distribution

Bypassing traditional media gatekeepers by prioritizing Twitch, YouTube, and other streaming platforms to own the fan relationship directly.

#### 4. Niche Community Cultivation

Super-serving specific, passionate, and often underserved audiences (e.g., PWHL, NWSL) to build a loyal foundation.

### THE INCUMBENT'S RESPONSE

#### 1. Embrace Digital Distribution

Countering the challenger advantage by striking massive deals with streaming giants like Amazon, Netflix, and Peacock (e.g., NFL, NBA).

#### 2. Extend Dominance

Using financial power to outbid competitors for digital rights and fund high-quality, social-friendly content at a scale challengers cannot match.

#### 3. Co-opt or Acquire

Incorporating successful innovations from rivals or, in extreme cases, neutralizing the threat through mergers and acquisitions (e.g., PGA Tour/LIV Golf).

#### 4. International Expansion

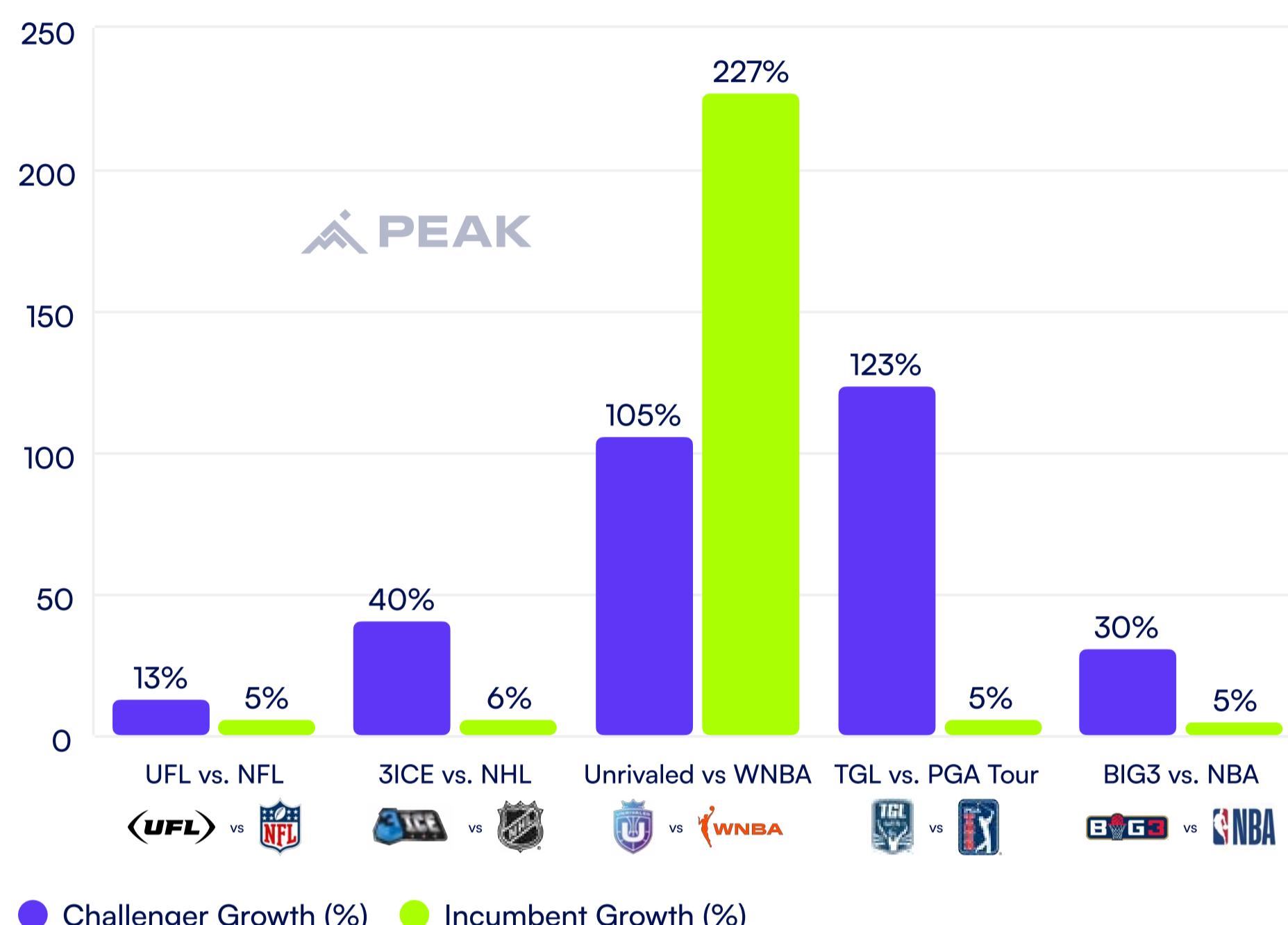
Investing in international games, content, and partnerships to grow fanbases beyond domestic markets (e.g., NFL & NBA globally).

## SECTION 04: SPORTS INNOVATION TRENDS

# THE OLD GUARD VS. THE NEW WAVE

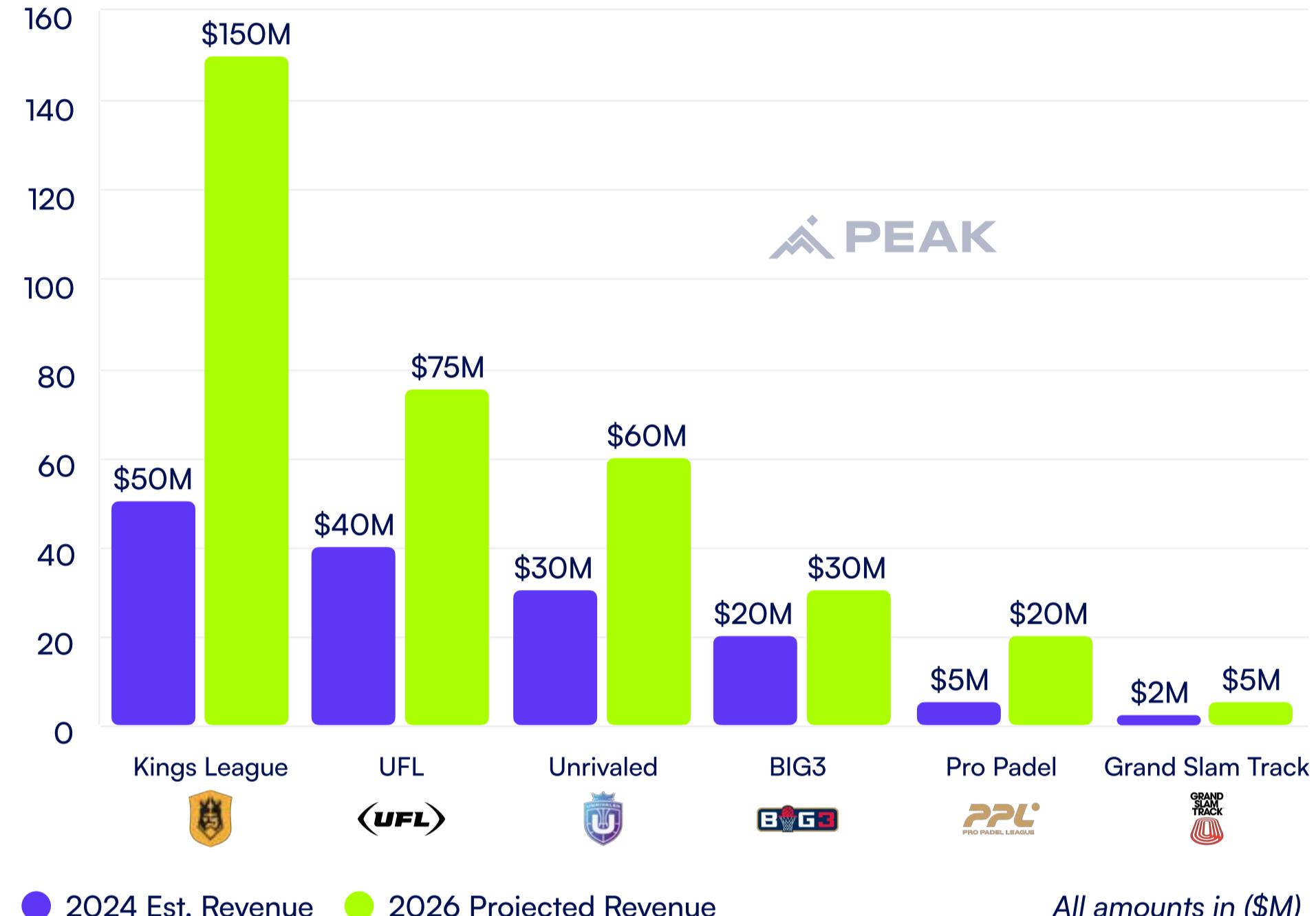
### Social Media Velocity<sup>1</sup>

#### Challenger vs Incumbent



### Emerging Leagues<sup>1</sup>

#### Estimated Projected Revenue Growth (2024 vs. 2026)



All amounts in (\$M)

#### EMERGING LEAGUES KEY STATS:

- Younger Demographic Capture: Kings League achieves 85-90% under-30 audiences, which is the specific group traditional sports struggle to engage with massive declining youth viewership.
- Shorter Format Benefits: e.g. 7v7 produces more goals per minute than 11v11, higher ball-in-play percentages, and more individual player touches.
- Enhanced Engagement: Modified formats create more frequent highlight-worthy moments designed for social sharing and viral distribution.
- Production Efficiency: Significant cost reductions through arena-based venues vs traditional stadiums and simplified technical requirements.
- Democratised access: prioritise access to the 99% of fans who will be digital (not physical) and can access live streams on platforms (for free).
- Media Rights are not a core revenue stream: Kings League prioritizes reach over exclusivity, as a result only 5% of revenue is from media rights, 65-70% comes from sponsorships.

Emerging leagues have identified a fundamental mismatch between traditional sports delivery and next-generation consumption preferences. They optimise for cost efficiency, digital accessibility, and modern media distribution — overall achieving superior product-market fit with the demographic that will define sports economics for the next two decades.

They will continue to eat the pie - but the question is just how much?

"We're witnessing sports' coming-of-age story, where alternative formats are successfully speaking the language of next-generation fans and redefining what constitutes sport in the 21st century. The way in which these new formats are operating and resonating are signals of a fundamental shift in how future generations consume, engage with, and define sport itself."



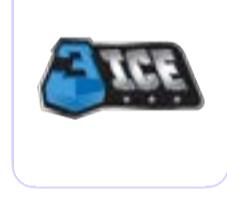
LEANNE BATS

— Head of Digital and Innovation, Sport Waikato

## SECTION 04: SPORTS INNOVATION TRENDS

# INVESTMENT IN EMERGING LEAGUES

Backed by top investors and founders, leagues like The Hundred, Kings League, and Baller League have raised over \$800M - proving the momentum behind new IP and format innovation is real.

<div>  <p><b>The Hundred</b> Cricket · 2021</p> <p>New format league with eight city teams, 100 balls per side, simplified rules, and equal spotlight for men's and women's fixtures.</p> <p> \$649.6M</p> <p> Sundar Pichai, Satya Nadella, Reliance Group, Tom Brady, GMR Group</p> </div>	<div>  <p><b>Kings League</b> Football / Soccer · 2022</p> <p>Seven-a-side football league founded by Gerard Piqué, featuring unique rules and celebrity team presidents, delivering an entertainment-first football experience.</p> <p> \$62M</p> <p> Left Lane Capital, Fillip, and Cassius, We Are Era</p> </div>	<div>  <p><b>Unrivaled</b> Basketball · 2023</p> <p>Women's pro basketball league featuring six teams, 3-on-3 full-court games, unique rules, and a 1-on-1 tournament.</p> <p> \$43.7M</p> <p> BYL Ventures, Micheal Phelps, Megan Rapinoe, Trybe Ventures</p> </div>
<div>  <p><b>Baller League</b> Football / Soccer · 2023</p> <p>Six-a-side indoor football with short matches and final-minute rule changes. Teams run by celebrities &amp; influencers, with players picked via a draft.</p> <p> \$35M</p> <p> EQT Ventures</p> </div>	<div>  <p><b>Grand Slam Track</b> Athletics · 2025</p> <p>Global track league headed by Michael Johnson. Four meets held across four locations, top athletes participating, head-to-head races, big prize money.</p> <p> \$30M</p> <p> Winners Alliance</p> </div>	<div>  <p><b>Tomorrow Golf League</b> Golf · 2025</p> <p>Six teams of PGA stars in two-hour, tech-driven, team matches at SoFi Center in Los Angeles, blending virtual and real golf.</p> <p> \$14.7M</p> <p> Stephen Curry, Chris Paul</p> </div>
<div>  <p><b>Pro Padel League</b> Padel · 2024</p> <p>Ten teams split into two groups of five, playing round-robin matches during four regular-season events. Top eight teams compete in PPL Cup Final.</p> <p> \$10M</p> <p> Left Lane Capital, Epic Padel Inc., Kactus Capital Management</p> </div>	<div>  <p><b>3ICE</b> Ice Hockey · 2022</p> <p>3-on-3 professional ice hockey league. No penalties, no long intermissions, and video reviews.</p> <p> \$14.9M</p> <p> KB Partners</p> </div>	<div>  <p><b>Intennse</b> Tennis · 2024</p> <p>Team-based pro tennis league with matches, divided into 10-minute "Bolts," played on a single court, fan cheering allowed during points.</p> <p> \$4M</p> <p> Triple B</p> </div>
<div>  <p><b>Big3</b> Basketball · 2013</p> <p>Pro 3-on-3 basketball league featuring former NBA stars. Games played to 50 points, with four-point shots, no game clock, &amp; fast-paced action.</p> </div>	<div>  <p><b>Indian Street Premier League</b> Cricket · 2024</p> <p>Cricket league spotlighting street talent, featuring short 10-over matches and city-based teams.</p> </div>	<div>  <p><b>Queens League</b> Football / Soccer · 2022</p> <p>Seven-a-side women's football league with 12 teams, followed by playoffs, emphasizing highscoring and entertaining games.</p> </div>

## SECTION 04: SPORTS INNOVATION TRENDS

# COMPETITIVE SOCIALIZATION

The rise of competitive social venues - where sport meets F&B in immersive, high-energy spaces - is reshaping how people connect. Often dubbed “TopGolf for X,” the category hit a new high in 2024 with \$442M raised across seven deals, 81% of which came from the U.S. Golf concepts led the way, with Topgolf, Puttshack, and Five Iron Golf at the forefront. But momentum is building in motorsports, baseball, and cue sports—signaling a broader shift toward active, tech-enabled social entertainment that’s also driving fan engagement and deeper adoption across these sports.

### 5 Year Funding Overview (2020-2024)<sup>1</sup>



**\$1.2B**

All time Investment into Tech-Enabled Competitive Socialization

- \$770M in the last 5 years
- 64% of the total funding
- 55% towards Golf venues
- Baseball, Cricket emerging
- 81:19 USA:UK
- Countries splitting investment

### Top Funded Companies<sup>1</sup>

#	Name	Total Funding (\$m)	HQ	Sport
1	Topgolf	301.4	Dallas	Golf
2	Cosm*	250.0	Los Angeles	Multisport
3	Puttshack	237.0	Chicago	Golf
4	F1 Arcade	167.9	London	Motorsports
5	Five Iron Golf	50.0	New York City	Golf
6	Poolhouse	34.0	London	Billiards, Pool & Snooker
7	Home Run Dugout	24.5	Austin	Baseball
8	BatBox	14.6	Dallas	Baseball
9	Puttory	10.0	Dallas	Golf
10	Platform Golf	5.0	Binghamton	Golf

\*Cosm: While not competitive as it is mainly passive consumption, the venues present tech-enabled socialization with a backdrop of sports so worth including

## SECTION 04: SPORTS INNOVATION TRENDS

# WHAT AI COULD MEAN FOR SPORTS

AI is continuing to revolutionize all aspects of sports, enhancing performance analysis, optimizing training regimens, and refining strategic decision-making processes for teams and athletes.<sup>1</sup>

### AREAS OF POTENTIAL POSITIVE IMPACT

#### Performance Enhancement

Artificial intelligence can analyze vast amounts of data to optimize athlete performance, leading to enhanced training, injury prevention strategies, and personalized development plans based on performance/individual metrics.

#### Strategic Decision-Making

Coaches and teams can use predictive modeling by GenAI systems for in-game strategies, opponent analysis, and tactical adjustments. Artificial intelligence algorithms can process real-time data to suggest optimal plays/formations.

#### Health Monitoring

Wearable sensors powered by artificial intelligence enable athletes to perform at peak levels with minimized health risks by monitoring health metrics in real-time, potentially preventing injuries and helping improve recovery times.

#### Fan Engagement

Artificial intelligence can generate sports content that can create personalized and immersive experiences for audiences. The interactive features can help deepen fan loyalty and increase viewership/engagement.

#### Streamlined Operations

Automated content creation helps to enhance reporting and broadcasting efficiency. With artificial intelligence, content and coverage can be expanded into locations where human resources are limited.

#### Referee Assistance

Video analysis powered by artificial intelligence can assist referees and officials in making more accurate decisions, reducing human error, and enhancing fairness in officiating.

### AREAS OF POTENTIAL CONCERN

#### Privacy Concerns

With the collection and analysis of biometric and tracking data, the use of artificial intelligence in sports raises concerns about athletes' privacy (which teams and organizations must handle securely).

#### Inequality

Teams with differing financial situations and resources could have better access to artificial intelligence, creating disparities between teams and athletes and widening the gap in competitive advantage.

#### Job Displacement

The usage of artificial intelligence in sports analytics, administration, and scouting may create less of a need for human analysts, reducing job opportunities.

#### Cybersecurity

GenAI could present risks of proprietary data being obtained by rival teams if strategies are not properly secured, demonstrating the critical need for cybersecurity when applying GenAI in sports strategy.

#### Over-Reliance

An over-reliance on artificial intelligence in decision-making can diminish human expertise and intuition, stripping creativity from sports coaching and strategy.

#### Misplaced Trust

Excessive trust in GenAI systems can become harmful as margins of error still exist; to have appropriate levels of trust, it is essential to manage expectations about artificial intelligence's capabilities.

SECTION 05

# ECOSYSTEM OVERVIEW

# SECTION 05: ECOSYSTEM OVERVIEW

# SOLUTION SPOTLIGHT

We asked our contributors featured in this report to name SportsTech solutions that have impressed them recently. Based on their recommendations - along with a few standout startups we're closely tracking - we've curated a must-watch list of innovative solutions in SportsTech.

## FOR ATHLETES



### Oliver Sports

Athlete-centric data & performance tracking

Oliver Sports Provides professional-grade athlete performance solutions—live data, video tagging, and analytics—for teams and scouts to evaluate talent and optimize training.

## FOR EXECUTIVES



### Sportsvisio

AI-Powered Stat Tracking & Highlights

Sportsvisio uses AI to automatically analyze game footage from any device, generating comprehensive player stats and video highlights. The platform eliminates manual stat-keeping and video editing, providing coaches, players, and leagues with actionable data to improve performance and strategy.

## FOR ATHLETES



### Diamond Kinetics

Motion Technology for Player Development

Diamond Kinetics accelerates youth baseball and softball development using a technology platform of connected devices, computer vision, and VR. The system enhances real-world play, providing portable mobile tools to speed up learning and make practice more engaging.

## FOR FANS



### Machina Sports

Sports AI agents platform

Machina Sports is a developer platform for building real-time AI agents that power multilingual, interactive content like quizzes, insights, and gamified fan experiences.

## FOR FANS



### Creator Sports Network

Fan access to live sports through creator-led broadcasts

Creator Sports partners with Liverpool, Spurs, ONE Championship, and BIG3 to deliver live sports via creator-led social platforms.

## FOR FANS



### PressBox

Personalized content automation for modern fan engagement

PressBox helps leagues and teams create and distribute sponsorable, fan-specific content at scale—reaching Gen-Z where they are, through moments that matter.

## FOR EXECUTIVES



### Fastbreak AI

AI-powered scheduling for sports leagues

Fastbreak AI helps leagues optimize match scheduling using AI, balancing venue logistics, broadcast demand, and fairness at scale.

## FOR EXECUTIVES



### relo Metrics

Sponsorship analytics & media valuation

relo Metrics provides real-time sponsorship analytics, helping brands and rights holders track exposure across broadcasts and digital platforms.

## FOR ATHLETES



### StatusPro

VR/AR training for athletes

StatusPro uses virtual and augmented reality to deliver immersive training and game prep experiences for elite athletes and teams.

## FOR EXECUTIVES

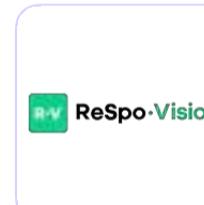


### ScorePlay

Automated content distribution for teams

ScorePlay automates the distribution of media assets—making it easy for teams to deliver branded content to athletes and sponsors in real time.

## FOR EXECUTIVES



### Respo.Vision

AI video tracking for tactical insights

Respo.Vision applies computer vision to match footage, delivering detailed player tracking and tactical insights to clubs and broadcasters.

## FOR EXECUTIVES



### Zoomph

Sponsorship performance measurement across digital platforms

Zoomph offers measurement and activation tools that help teams, leagues, and brands understand and optimize fan engagement across social, broadcast, and event channels using real-time analytics.

## FOR FANS



### ALT Sports Data

Betting and Enablement platform for alternate sports

ALT Sports Data powers real-time betting in emerging sports with partners like Formula 1, X Games, and bet365.

## FOR EXECUTIVES



### Minute.ly

AI-Powered Video Highlight Generation

Minute.ly's AI platform automatically identifies peak moments in live broadcasts to instantly generate compelling short-form video highlights. The solution enables publishers, leagues, and teams to maximize fan engagement and viewership by distributing dynamic content across all digital channels in real time.

## FOR ATHLETES



### Springbok Analytics

AI-driven 3D muscle imaging for health and performance insights

Implemented by Leicester City and Houston Texans and Now NY Liberty, this tech creates high-res 3D muscle visuals for precise sports, research, and rehab analysis.

## FOR EXECUTIVES



### Raven Controls

AI-powered incident management platform

Raven Controls provides AI-powered software that transforms event operations by enhancing real-time issue transparency and streamlining processes for venues and major events, ensuring efficient and secure management.

## FOR FANS



### Fortress GB

Fan engagement and commerce platform

Fortress GB offers a comprehensive platform for sports organizations to strengthen fan relations, expand transactions, and attract partners. It delivers personalized experiences, loyalty programs, and payment solutions to energize and reward fans.

## FOR EXECUTIVES



### CrowdIQ

State-of-the-art computer vision for crowd analytics

CrowdIQ.ai leverages AI to analyze real-time crowd dynamics and digital fan sentiment. It delivers predictive insights that help teams, venues, and sponsors understand audience behavior, optimize gameday operations, and enhance the fan experience.

# SECTION 05: ECOSYSTEM OVERVIEW

# INDUSTRY PREDICTIONS

Are there any underserved areas in SportsTech that you think are ripe for disruption?

**Jeffrey Hintz**

Executive Director,  
Sports Tech HQ



"We see a tremendous opportunity for innovation in technology tailored specifically to female athletes. The explosive growth in popularity across women's sports is far outpacing the development of tools designed with the female athlete in mind. As participation continues to rise, elite programs and clubs will increasingly need talent identification and performance solutions built to meet the unique needs of female competitors."

**Andy Marston**

Founder & Managing Director,  
Sports Pundit



"There are several areas ripe for disruption that extend beyond direct use cases in sport. The real opportunity lies in how sports teams, and more broadly, owners of high-profile IP, leverage their position at the intersection of multiple industries, influence, and capital. They shouldn't just act as brand amplifiers; they should be owning equity in the companies they help accelerate. For that reason, I believe we'll see corporate venture programs become a far more influential revenue stream in the near future."

**Leanne Bats**

Head of Digital & Innovation,  
Sport Waikato



"Fantasy and betting are basically the only scaled ways fans can do something right now - and that's a pretty limited definition of engagement."

There's a massive opportunity to shift this toward 'Fan Empowerment'. Think participatory IP, hyper-personalization, UGC engines, fan governance, fractional ownership, even creator-commerce (where creator economy meets sport).

The next wave of sports tech should turn fans from spectators into active stakeholders in the experience."

**Ricardo Mazzucca**

Partner & SportsTech Innovation Leader,  
Arena Hub



"While enhancing fan experiences and monetization remains key, I think an underserved area is the athlete's post-career transition. A huge opportunity exists to disrupt this space with an integrated ecosystem of platforms for AI-driven upskilling, curated networking, and entrepreneurial guidance and training, fundamental for reshaping how athletes think and build their second careers."

**Marilou McFarlane**

SportsTech Startup Advisor & Consultant



"Athlete performance—especially for female athletes—is emerging as one of the most exciting frontiers in sports tech. There's significant opportunity to use AI, computer vision, and sport- and athlete-specific hardware to better predict and prevent injury and enhance performance. This includes innovating from GPS-based performance data tracking that works more consistently in real time—indoors and out—using Bluetooth or other complementary tech, and provides more relevant and actionable data. It also means integrating tools that support development of game intelligence, improve mental health, and enhance talent identification. While much of the industry remains focused on the business side of sports, investing in technologies that directly support athletes is equally essential."

**Javier Altamirano**

Global Head of Startups,  
SportRadar



"As the old adage goes, the best way to predict the future is to create it. Corporations best poised to connect the start-ups ecosystem with top leagues, media, and sports books will win by providing exponential fan value."

**Joanne Redfern**

Founder,  
Futrhood Media



"The tech-fuelled disruption over the next 10 years will be a complete reimaging the sports media experience. Sport will still be played on the pitch, field or court - but for younger fans the live product will no longer be core to their fandom. Rather, they will demand a quality digital experience, and if not watching live, their fandom will be 'always-on'; immersive, streamed, gamified and shared via a media ecosystem embedded in their lives. Sports media no longer competes with other sports for attention but with Fortnite, Netflix, Roblox and YouTube creators. Those who redesign the fan experience via technology, and use data to continually improve it, will still HAVE fans in 10 years."

**Cameron Korab**

Founder,  
Youth Sports Business Report

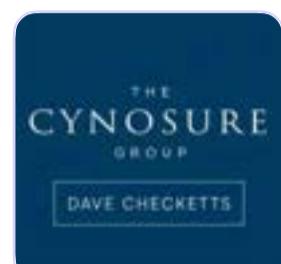


"The youth sports industry is widely recognized as fragmented across stakeholders. We are seeing true market demand for development of a unified, family-centric platform designed to streamline the youth sports experience and reduce administrative burden on parents. Early-stage solutions are emerging, and we are closely monitoring their evolution and adoption across the various key players in the youth sports ecosystem."

# SECTION 05: ECOSYSTEM OVERVIEW

# SPORTSTECH FOCUSED FUNDRAISING

\$6B+ OF NEW CAPITAL RAISED FOR NEW FUNDS<sup>1</sup>



## Cynosure | Checketts Sports Capital

\$1.20B



Cynosure | Checketts Sports Capital is targeting fund commitments exceeding \$1.2B to invest in various sports assets across professional/collegiate sports teams, leagues, venues/facilities, sports technology, and media rights. The private equity fund resulted from a strategic collaboration between Dave Checketts, ex-President of numerous professional sports teams, and The Cynosure Group, a private investment fund founded by the Eccles family which has a longstanding support of Utah sports.



## Halo Experience Company

\$1.00B



Halo Experience Company, is raising a \$1B fund focused on the intersection between sports and technology. Co-founded by Qualtrics founder Ryan Smith and Accel's Ryan Sweeney, the fund aims to invest in two dozen startups with established products. Halo Experience positions itself to drive growth in the digital media and sports industries which Ryan Smith coined to be the "Experience Economy." The fund has rapidly raised \$875M within the first two months following launch.



## Harbinger Sports Partners

\$0.75B



Harbinger Sports Partners has raised a \$750M private equity fund to focus on minority stake investments in sports franchises across all US leagues. The fund was founded by Mark Cuban who was the ex-owner of the Dallas Mavericks, accompanied by Rashaun Williams and Steve Cannon, a minority owner and the ex-CEO of the Atlanta Falcons. The fund is looking to deploy \$50-\$150M checks into 15 different teams.



## TPG | Symphony Ventures



TPG launched a dedicated sports investing business alongside Rory McIlroy's Symphony Ventures. The fund aims to bring a private equity approach to investments across sports IP and other operating businesses. Rory McIlroy and his partner Sean O'Flaherty will serve as operating partners. TPG has a lot of experience in media / entertainment investing, having backed CAA, Dream11, Fandom, and Troon.



## Ariel Investments



Ariel Investments introduced 'Project Level', which is a new portfolio that will consist of sports teams, college sports opportunities, and leagues that will expand opportunities within women's sports. Project Level has already been confirmed to be a lead investor in the newly introduced Denver NSWL expansion team. Ariel Investments has a past track record of investing in sports franchises like MSG Sports and Manchester United.

## Top 2024 Announced Funds



Fund	Fund Amount (\$M)
Cynosure   Checketts Sports Capital	\$1,200*
Halo Experience Company	\$1,000*
Harbinger Sports Partners	\$750
TPG   Symphony Ventures	-
Ariel Investments	-
Elevate   Velocity Capital Management	\$500
Monarch Collective	\$250
One Eight Capital	\$100*
Champion Venture Partners	\$100*
X&KSK	\$98
Yashaa Global Capital	\$75*
Scrum Ventures	\$68
AO Ventures	\$48
Cartan Capital	\$40*

\*Target amount for fund, not necessarily raised

"The sports sector has evolved into a resilient, high-growth asset class. Fueled by surging media rights, global fan monetization, and scalable digital infrastructure, we're seeing significant institutional capital enter the space. This is no longer a niche play—it's a repeatable platform strategy with strong fundamentals and exit visibility."



MOHIT PAREEK

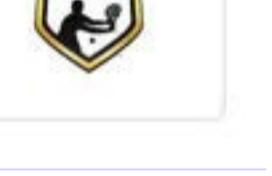
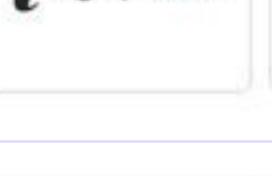
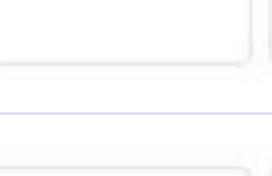
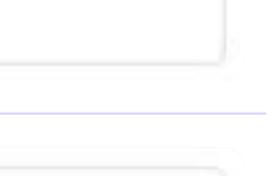
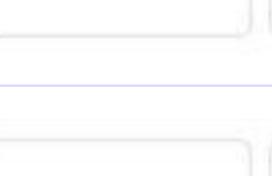
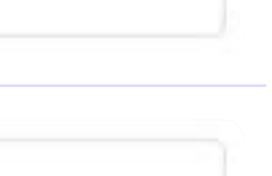
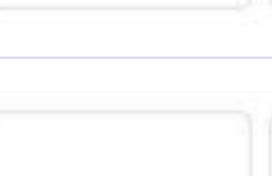
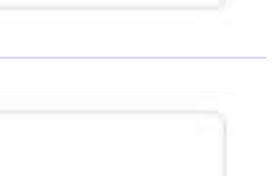
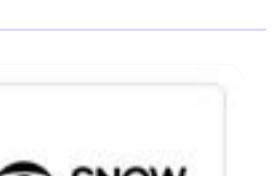
— Partner, Drake Star

# SECTION 05: ECOSYSTEM OVERVIEW

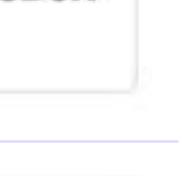
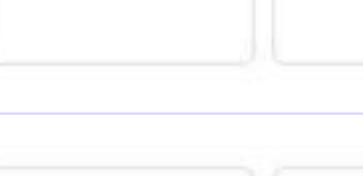
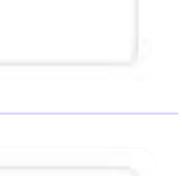
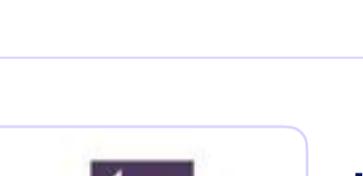
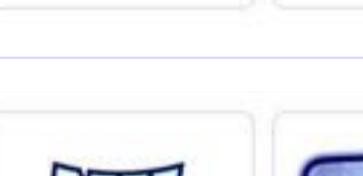
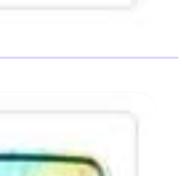
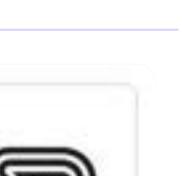
# SPORTSTECH LEAGUE TABLES

TOP 10 INVESTORS LTM JUNE 2025<sup>1</sup>

## Active Early To Late Investors

#	Investor	PEAK	Deals	Select Investments
1	 Bolt Ventures	Early to Late	6	 
2	 Avenue Capital Group	Early to Late	4	 
3	 Will Ventures	Early to Late	4	 
4	 Left Lane Capital	Early to Late	4	 
5	 Scrum Ventures	Early to Late	4	 
6	 Accelerate Ventures	Early to Late	3	 
7	 Ares Management	Early to Late	2	 
8	 Bluestone Equity Partners	Early to Late	2	 
9	 Alignment Growth	Early to Late	2	 
10	 Ryan Sports Ventures	Early to Late	2	 

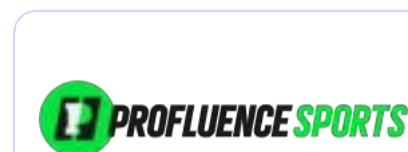
## Active Seed Focused Investors

#	Investor	PEAK	Deals	Select Investments
1	 Alumni Ventures	Seed to Early	8	 
2	 Elysian Park Ventures	Seed to Early	6	 
3	 Courtside Ventures	Seed to Early	4	 
4	 Sharp Alpha Advisors	Seed to Early	4	 
5	 Profluence Capital	Seed to Early	4	 
6	 SUSA Ventures	Seed to Early	4	 
7	 Antler	Seed to Early	4	 
8	 Apex Capital	Seed to Early	3	 
9	 KB Partners	Seed to Early	3	 
10	 Eberg Capital	Seed to Early	3	 

# SECTION 05: ECOSYSTEM OVERVIEW

## INVESTOR PREDICTIONS

Which emerging technologies do you believe will reshape the sports industry in the next 2 - 3 years?

**Andrew Petcash**Co-Founder & CEO,  
Profluence Sports

"The sports industry is filled with manual workflows and undervalued assets. AI and automation will unlock massive efficiency gains, surface hidden value, and drive a new era of monetization across teams, leagues, and media."

**Rohn Malhotra**Co-Founder & Managing Director,  
SportsTechX

"Technologies that will truly reshape sports are those that turn passive fans into active stakeholders — emotionally, physically, and economically. Hyper-personalization, stronger community connections & immersive experiences driven by AI, XR or Blockchain aren't just buzzwords. They unlock new revenue streams and deepen engagement, which is crucial for maximizing Sports IP value that investors are betting heavily on."

**Cort Post**Principal,  
Courtside Ventures

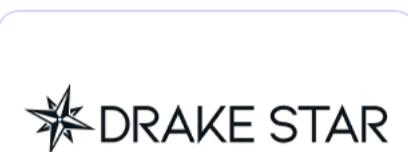
"AI applications with sports workflows. AI tools are definitely not new and seem to be all the talk across the greater VC ecosystem. But in speaking with dozens of pro sports teams across various major leagues, it's shocking how few solutions today are tailor built for use within sports organizations. From ticketing workflows to personalized marketing campaigns and fan sentiment analysis, sports are a relatively under-innovated sector for AI solutions."

**Wayne Kimmel**Managing Partner,  
SeventySix Capital

"Emerging technologies like AI-driven analytics and smart equipment are rapidly reshaping the sports industry. This gives athletes, coaches, and fans real-time insights and immersive experiences. Our portfolio company Diamond Kinetics is a great example, bringing professional-grade, data-driven training tools to baseball and softball players at every level and helping democratize access to top-tier performance technology."

**Jared Shaber**Senior Vice President, Global Technology  
Group,  
Houlihan Lokey

"AI-powered content creation and distribution tools are reshaping the sports media landscape, enabling teams, leagues, and rights holders to deliver personalized, real-time experiences that deepen fan engagement and unlock scalable monetization opportunities across all levels of the sports ecosystem."

**Mohit Pareek**Partner,  
Drake Star

"The sports tech market has seen an unprecedented amount of M&A and inflow of new capital and it's going to further intensify. Sports is far beyond a trophy asset, the sector is consolidating rapidly, with youth sports, digital media, and fan engagement leading the charge. Massive institutional funds are driving strategic roll-ups, integrating AI, analytics, and immersive tech to create powerful, scalable ecosystems that redefine fan and athlete experiences."

**Geoffrey Cheng**Investment Manager, Comcast SportsTech,  
powered by Boomtown Innovation

"Blockchain-enabled solutions will play a prominent role in the next major cycle of media rights negotiations as rightsholders recognize digital-first, creator-led IP is a key way to connect with their audience."

**Ian Doody**Co-founder & Managing Partner,  
Powerhouse Capital

"Sport teams and leagues are now global IP. Those who can embrace storytelling to better engage and retain their customers over the long term will benefit greatly and realize their full potential. We often talk about how businesses and companies need to know their best customers, understand their behaviors, and build a direct relationship with them."

**Danny Cortenraede**Founder & Managing Partner,  
Instudio Ventures

"Sports is shifting from spectacle to system. In the next 2—3 years, AI, real-time biometrics, and immersive tech will turn every athlete, venue, and fan into a responsive data node. The winners won't just entertain —they'll operate as adaptive performance networks. Watch for a breakout wave in predictive health, physical formats, and intelligent monetization models that rewrite how value is created in sport."

**Jared Shaber**Senior Vice President, Global Technology  
Group,  
Houlihan Lokey

"AI-powered content creation and distribution tools are reshaping the sports media landscape, enabling teams, leagues, and rights holders to deliver personalized, real-time experiences that deepen fan engagement and unlock scalable monetization opportunities across all levels of the sports ecosystem."

# GLOBAL SPORTSTECH INVESTOR ECOSYSTEM

Launched 2024/2025

## North America

No.	Investor	HQ
1	Lalotte Ventures	🇨🇦 Montreal
2	LangLeven Group	🇨🇦 Montreal
3	Cardinal Sports Capital	🇨🇦 Toronto
4	Maple Leaf Sport & Entertainment	🇨🇦 Toronto
5	Playmaker Capital	🇨🇦 Toronto
6	Relay Ventures	🇨🇦 Toronto
7	Beyond the Game Network	🇺🇸 Atlanta
8	Hawks Ventures	🇺🇸 Atlanta
9	Phoenix capital Ventures	🇺🇸 Atlanta
10	LivWell Ventures	🇺🇸 Austin
11	Next Ventures	🇺🇸 Austin
12	TXV Partners	🇺🇸 Austin
13	SC30	🇺🇸 Bay Area
14	DRIVE by Draftkings	🇺🇸 Boston
15	The Player's Impact	🇺🇸 Boston
16	Will Ventures	🇺🇸 Boston
17	Causeway Media Partners	🇺🇸 Cambridge
18	DSG Ventures	🇺🇸 Coraopolis
19	Phoenix Sports Partner	🇺🇸 Chicago
20	Ryan Sports Venture	🇺🇸 Chicago
21	SeventySix Capital	🇺🇸 Conshohocken
22	Arctos Partners	🇺🇸 Dallas
23	Konvoy Ventures	🇺🇸 Denver
24	Old Tom Venture	🇺🇸 Denver
25	Champion Venture Partner	🇺🇸 Fargo
26	Titletown Tech	🇺🇸 Green Bay
27	KB Partners	🇺🇸 Highland Park
28	The Collectiv	🇺🇸 Houston
29	Elysian Park Ventures	🇺🇸 Los Angeles
30	EP Golf Ventures	🇺🇸 Los Angeles
31	InStudio Ventures	🇺🇸 Los Angeles
32	Ludis Capital	🇺🇸 Los Angeles
33	Monarch Collective	🇺🇸 Los Angeles
34	Pulsar VC	🇺🇸 Los Angeles
35	Acies Investments	🇺🇸 Manhattan Beach
36	Bluestone Equity	🇺🇸 New York City
37	Cerro Capital	🇺🇸 New York City
38	Courtside Ventures	🇺🇸 New York City
39	Dyansty Equity	🇺🇸 New York City
40	HBSE Ventures	🇺🇸 New York City

## North America

No.	Investor	HQ
41	JDS Sports	🇺🇸 New York City
42	MSP Capital	🇺🇸 New York City
43	Next 3	🇺🇸 New York City
44	35V	🇺🇸 New York City
45	Raine Group	🇺🇸 New York City
46	Red Bird Capital Partners	🇺🇸 New York City
47	Sharp Alpha Advisors	🇺🇸 New York City
48	Mindspring Capital	🇺🇸 Newport Beach
49	RX3 Growth Partners	🇺🇸 Newport Beach
50	Backswing Ventures	🇺🇸 Orlando
51	Sapphire Sport	🇺🇸 Palo Alto
52	Velocity Capital Management	🇺🇸 Palo Alto
53	Fitt Capital	🇺🇸 Pittsburgh
54	Proflunce Capital	🇺🇸 Pittsburgh
55	Oregon Sports Angels	🇺🇸 Portland
56	Next Play Capital	🇺🇸 Redwood City
57	Cartan Capital	🇺🇸 San Francisco
58	JAZZ Venture Partners	🇺🇸 San Francisco
59	Mosaic General Partnership	🇺🇸 San Francisco
60	Play Time HoldCo	🇺🇸 San Francisco
61	Rabil Ventures	🇺🇸 San Francisco
62	Scrum Ventures	🇺🇸 San Francisco
63	Serena Ventures	🇺🇸 San Francisco
64	Stadia Ventures	🇺🇸 St. Louis
65	Bruin Sports Capital	🇺🇸 White Plains
66	True Sky Ventures	🇺🇸
67	Halo Experience CO	🇺🇸
68	Harbinger Sports Partners Fund	🇺🇸

## South America

No.	Investor	HQ
1	Go4it	🇧🇷 Rio de Janeiro
2	Sports angels	🇧🇷 Sao Paulo

# GLOBAL SPORTSTECH INVESTOR ECOSYSTEM

Launched 2024/2025

## Europe

No.	Investor	HQ
1	Red Bull Ventures	🇦🇹 Salzburg
2	EBAN Sports	🇧🇪 Brussels
3	Trust Esport Ventures	🇫🇷 Bordeaux
4	Decathlon Pulse	🇫🇷 Lille
5	Athletico Ventures	🇫🇷 Paris
6	Inspiring Sport Capital	🇫🇷 Paris
7	Seventure	🇫🇷 Paris
8	Sparring Sport Group	🇫🇷 Paris
9	BITKRAFT Esport Ventures	🇩🇪 Berlin
10	LeAD sports	🇩🇪 Berlin
11	ADvantage SportsTech Fund	🇮🇱 Jerusalem
12	Remagine Ventures	🇮🇱 Tel-Aviv
13	Match Ventures	🇱🇺 Luxembourg City
14	Apex Capital	🇵🇹 Cascais
15	CrowdSport	🇪🇸 Barcelona
16	Gaint Venture Capital	🇪🇸 Malaga
17	Shorai	🇪🇸 Valencia
18	Alima Sport VC	🇳🇱 Amsterdam
19	Venturerock	🇳🇱 Amsterdam
20	Ve2Fund	🇳🇱 Amsterdam
21	Dutch Sport Tech Fund	🇳🇱 Amstelveen
22	The Factory	🇳🇴 Oslo
23	Aser Ventures	🇬🇧 London
24	Dopamine Sports Ventures	🇬🇧 London
25	Guinness Ventures	🇬🇧 London
26	Hiro Capital	🇬🇧 London
27	Ixia Capital	🇬🇧 London
28	Mercuri	🇬🇧 London
29	Mercury 13	🇬🇧 London
30	Players Fund	🇬🇧 London
31	Skin in the game	🇬🇧 London
32	Sport Republic	🇬🇧 London
33	Sports Investment Partners	🇬🇧 London
34	Tekkorp Capital Partners	🇬🇧 London
35	Alumni Ventures	🇬🇧 Manchester

## APAC

No.	Investor	HQ
1	AO Ventures	🇦🇺 Melbourne
2	Wildcard Ventures	🇦🇺 Melbourne
3	Athletic Ventures	🇦🇺 Sydney
4	XT Ventures	🇦🇺 Sydney
5	XV Capital	🇦🇺 Sydney
6	Varcis Capital	🇭🇰 Hong Kong
7	Centre Court Capital	🇮🇳 Mumbai
8	Dream Sports Investments	🇮🇳 Mumbai
9	Unived Fund	🇮🇳 Mumbai
10	Da One Global Ventures	🇮🇳 New Delhi
11	Lumikai Ventures	🇮🇳 New Delhi
12	Yashaa Global Capital	🇮🇳 New Delhi
13	Asics Ventures	🇯🇵 Kobe
14	SURJ Sport Investments	🇸🇦 Jeddah
15	Play Ventures	🇸🇬 Singapore
16	Swing Capital	🇦🇪 Dubai

# GLOBAL SPORTSTECH INNOVATION ECOSYSTEM

## ACCELERATORS, INCUBATORS & CHALLENGES

Launched 2024/2025

### North America

No.	Program	HQ
1	PEAK Startup Competition & Groundbreakers Challenge	Las Vegas
2	Future of Sport Lab Incubator	Toronto
3	Comcast NBC Universal Sports Tech	Atlanta
4	Divinc	Austin
5	TitletownTech Startup Draft	Green Bay
6	Techstars Sports Accelerator Indianapolis	Indianapolis
7	Breakaway Accelerator programme	Las Vegas
8	RacquetX Startup Competition	Las Vegas
9	MLS Innovation Lab	New York City
10	Orlando Magic Venture Challenge	Orlando
11	Stadia Ventures	St. Louis
12	Plug and Play	Sunnyvale
13	SFIA Start-Up Challenge	Washington D.C.

### Europe

No.	Program	HQ
1	Andora Sports Scaleup Program (w GSIC by Microsoft)	Ordino
2	Le Pack	Lyon
3	Paris&Co   Sport	Paris
4	PSG Labs	Paris
5	Wylab	Chiavari
6	WeSport Up	Rome
7	Chiliz Incubator & Accelerator Program	Sliema
8	Barça Startup Challenge	Barcelona
9	SportBoost	Madrid
10	LALIGA & Sportboost	Madrid
11	UEFA Start-Up Challenge	Nyon
12	Impulse Start-Up Competition	St. Gallen

### APAC

No.	Program	HQ
1	AO StartUps	Melbourne
2	ASTN Startup Accelerator Program	Melbourne
3	Neom Sport (w GSIC by Microsoft)	Jeddah
4	Groundbreakers Challenge (GSIC by Microsoft x Sport Singapore)	Singapore

# GLOBAL SPORTSTECH INNOVATION ECOSYSTEM

## INITIATIVES - BY SPORTS ORGANIZATIONS

Launched 2024/2025

### Europe

No.	Program	HQ
1	SportsTech Belgium	🇧🇪 Liege
2	DIF Innovation Lab Copenhagen Danish Football Innovation Center	🇩🇰 Odense
3	PSG and Station F	🇫🇷 Paris
4	DFB Akademie	🇩🇪 Frankfurt
5	PZPN Innovation Hub	🇵🇱 Warsaw
6	Juventus Wesportup	🇮🇹 Turin
7	Juventus Forward	🇮🇹 Turin
8	Barca Innovation Hub	🇪🇸 Barcelona
9	Euroleague Basketball FanXP	🇪🇸 Barcelona
10	Real Madrid Next	🇪🇸 Madrid
11	Sport Innovation Alliance	🇪🇸 Madrid
12	Giants Innovation Hub	🇪🇸 Malaga
13	Sevilla FC Innovation Center	🇪🇸 Sevilla
14	Valencia CF Innovation Hub	🇪🇸 Valencia
15	UEFA Innovation Hub	🇨🇭 Nyon
16	FIFA Innovation Programme	🇨🇭 Zurich
17	Reimagine Football	🇳🇱 Amsterdam

### North America

No.	Program	HQ
1	SportsX (MLSE and AWS)	🇨🇦 Toronto
2	NBA Launchpad	🇺🇸 New York City
3	Sacramento Kings Capitalize	🇺🇸 Sacramento

### APAC

No.	Program	HQ
1	RCB Innovation Lab	🇮🇳 Bangalore

# GLOBAL SPORTSTECH INNOVATION ECOSYSTEM

## INITIATIVES - OTHER

Launched 2024/2025

### Europe

No.	Program	HQ
1	Sports Tech Research Network	🇧🇪 Ghent
2	SportUp	🇧🇪 Ghent
3	Nordic SportsTech	🇩🇰 Copenhagen
4	Sports Lab Copenhagen	🇩🇰 Copenhagen
5	Lahti Sports Hub	🇫🇮 Lahti
6	Decathlon Open Innovation	🇫🇷 Lille
7	SporTech FR	🇫🇷 Paris
8	Sports Innovation	🇩🇪 Dusseldorf
9	SheSportTech	🇩🇪 Goppingen
10	Norwegian Sport Tech	🇳🇴 Oslo
11	Startups In The Game	🇵🇱 Warsaw
12	SportsTech Ireland	🇮🇪 Limerick
13	Slovak Sports Innovation Centre	🇸🇰 Bratislava
14	Barcelona Sports Hub	🇪🇸 Barcelona
15	Hub23	🇪🇸 Barcelona
16	Indescat	🇪🇸 Barcelona
17	The Venue Barcelona	🇪🇸 Barcelona
18	Sports Innovation Hub	🇪🇸 Gijón
19	GSIC x MPW	🇪🇸 Madrid
20	Global Sport Innovation Center (GSIC)	🇪🇸 Madrid
21	CeltaLab1923	🇪🇸 Vigo
22	The Faktory	🇪🇸 Vitoria-Gasteiz
23	Health & Sports Technology Initiative	🇸🇪 Blekinge
24	Sports Tech Research Center	🇸🇪 Östersund
25	SportsTech Sweden	🇸🇪 Stockholm
26	NTN Innovation Booster	🇨🇭 Lausanne
27	ThinkSport	🇨🇭 Lausanne
28	Sports & Vitality Hub	🇳🇱 Breda
29	U-Forward	🇳🇱 Utrecht
30	Nummer 11	🇳🇱 Zeist
31	DAZN X	🇬🇧 London
32	Ennovate by Entain	🇬🇧 London
33	HYPE Sports Innovation	🇬🇧 London
34	London Sports Tech Network	🇬🇧 London
35	Sports Loft	🇬🇧 London
36	SportTech Hub	🇬🇧 London
37	MorethanEqual	🇬🇧 London

### North America

No.	Program	HQ
1	Canal Sports Hub	🇵🇦 Panama City
2	Sports Innovation Texas	🇺🇸 Austin
3	Sports Innovation Lab	🇺🇸 Boston
4	The Players Impact	🇺🇸 Boston
5	ESPN Edge Innovation Center	🇺🇸 Bristol
6	HTX Sports Tech	🇺🇸 Houston
7	Sports Tech HQ	🇺🇸 Indianapolis
8	Global Sports Venture Studio	🇺🇸 Los Angeles
9	Women in SportsTech	🇺🇸 San Francisco
10	Sports & Fitness Industry Association	🇺🇸 Silver Spring
11	San Diego Sport Innovators	🇺🇸 Solana Beach

### South America

No.	Program	HQ
1	Arena Hub	🇧🇷 São Paulo
2	Sportheca	🇧🇷 São Paulo
3	Sports CoLab	🇨🇱 Santiago

### APAC

No.	Program	HQ
1	Atos MENA HQ	🇸🇦 Riyadh
2	Aquabloom Sports Technology Group	🇭🇰 Hong Kong SAR
3	Telangana Sports Innovation Hub	🇮🇳 Hyderabad
4	Starlab	🇮🇳 Mumbai
5	SportsTech Tokyo	🇯🇵 Tokyo
6	Sports Tech Sandbox	🇲🇾 Putrajaya
7	Qatar SportsTech	🇶🇦 Doha

# SECTION 06

# PEAK 2026

## THE GLOBAL HOME OF SPORTSTECH & INNOVATION

PEAK AT A GLANCE

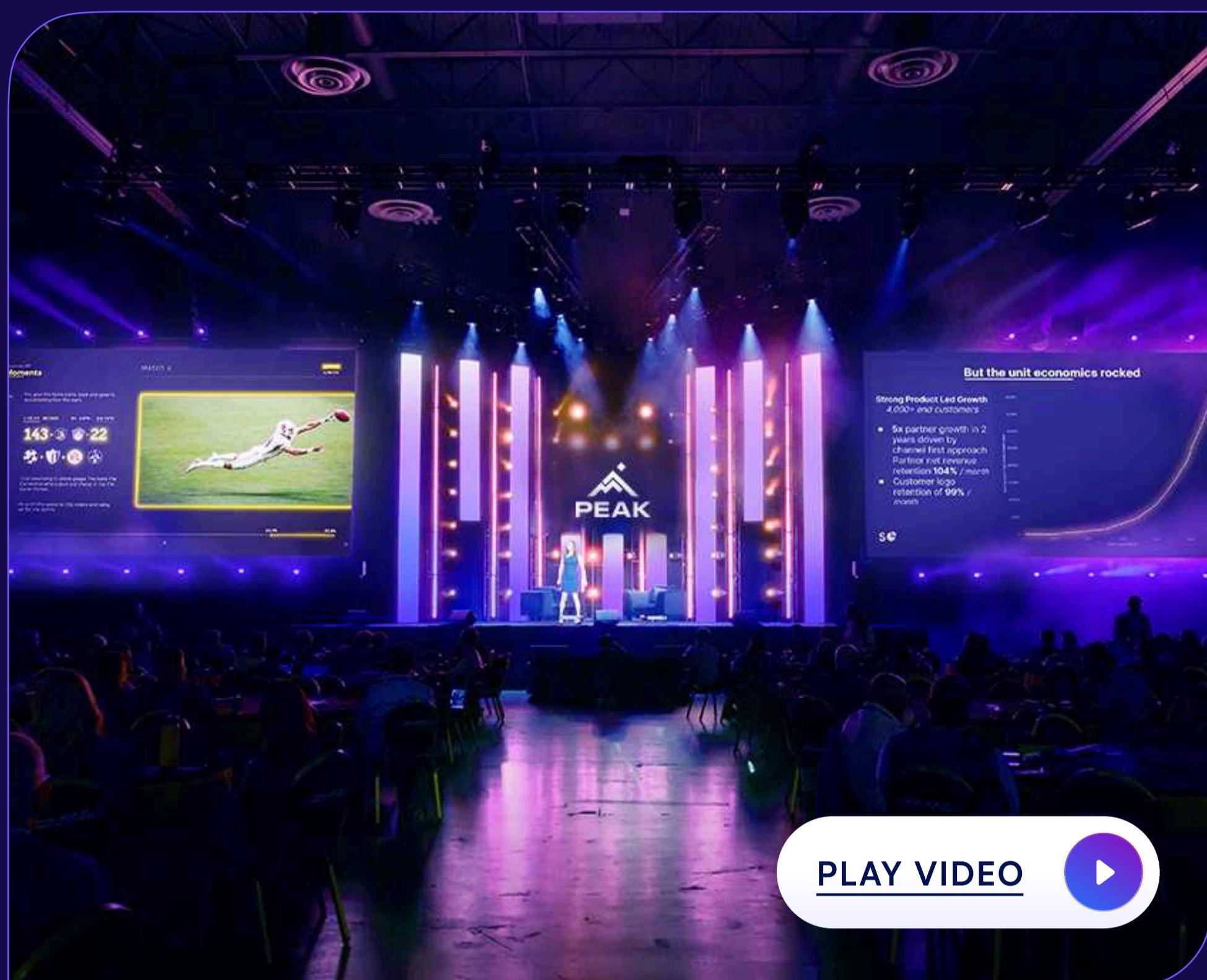
1,000+ ATTENDEES

50+ SPEAKERS

4+ TRACKS

50+ COUNTRIES

100+ EXHIBITORS



### POWERING THE FUTURE OF SPORTS

Join the top SportsTech founders, sports executives, innovation leaders, and investors at PEAK 2026 — the premier gathering uniting the entire industry in Las Vegas.

This is your chance to be at the epicenter of sports innovation:

- Connect with visionary innovators driving advancements in athlete performance, fan content and engagement, management, organizations, stadiums and more.
- Experience live demos of cutting-edge technology in our immersive Tech Expo.
- Learn from entrepreneurs and senior executives who are at the forefront of transforming the sports landscape.

Don't miss your opportunity to gain insider access to the people and innovations leading the way in sports.

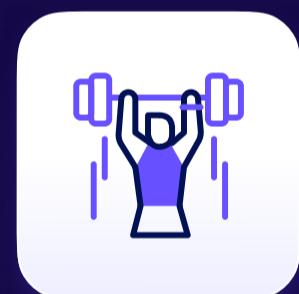
### THEMES



Shaping the Fan Experience



Maximizing Smart Venue Performance



Advancing Athlete Performance



AI-Powered Front Offices



Pathways to Pro



Financing the Future of Sport



Innovative Emerging Leagues



New Revenue & Future Monetization Model

### WHO SHOULD ATTEND?

PEAK is designed for innovators at the forefront of sports, including:

#### Founders

Visionary founders who are at the forefront of innovation, actively building the future of sports.

#### Sports Executives

VP to C-suite decision-makers who are leading technology and innovation across their organization.

#### Innovation Leaders

Leaders in the innovation trenches, from Managers to Heads, pioneering new initiatives across their organizations.

#### Investors

From VC to LPs, those that are financing the future of sports and the forces behind the curtain shaping the industry.

### WHO IS ATTENDING?

Connect with the industries most exciting startups, established brands & leading solution providers:



**CLAIM \$200 DISCOUNT WITH CODE**

**REPORT**





# THANK YOU!

Want to speak  
at PEAK?

CONTACT



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Interested in  
partnerships?

CONTACT



**Matt Williams**

CMO & CO-FOUNDER

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Looking to sponsor or book a booth?

CONTACT



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OR



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**PEAKCONF.COM**