sportradar

SportsPro

# GLOBAL SPORTSTECH REPORT 2026

## Now and next in SportsTech



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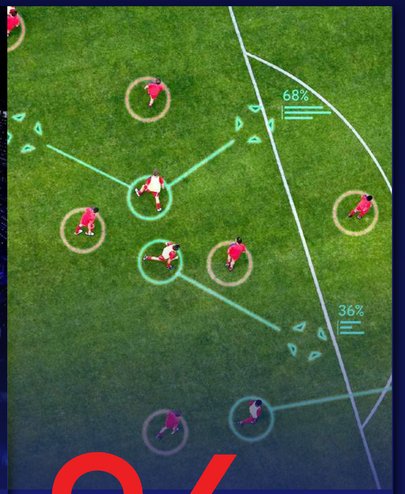

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# Welcome to the inaugural Global SportsTech Report.

Produced by SportsPro and Sportradar, this report is designed to help you cut through the noise and understand how emerging technologies are already reshaping the sports industry – and what that means for the future.

**By examining how technology is addressing today's business challenges while unlocking new growth opportunities, we aim to empower the industry to act with confidence, not caution.**

Drawing on quantitative data and qualitative insight, the report delivers a 360-degree view of the technological trends driving sport's digital transformation. Our analysis spans six core areas and is informed by a global survey of more than 160 senior executives from leagues, teams, brands, broadcasters, media platforms, service providers and venue operators, alongside in-depth conversations with sports technology leaders and real-world case studies.



AI is the defining thread running through every one of these areas. Its influence is no longer theoretical. From operational efficiency and performance optimisation to content production, monetisation and fan engagement, AI is fundamentally changing how sports organisations operate and compete.

**Adoption is accelerating rapidly. Our research shows that 82 per cent of sports organisations are already using AI, with almost all planning to increase investment over the next 12 months.**

Confidence is growing too: nearly three quarters of respondents say their AI initiatives have delivered tangible value so far, underpinned by an expanding range of proven use cases.

Yet progress is not without friction. Concerns around data privacy, ethics and governance remain, while budget constraints continue to limit ambition. Although unlocking new revenue streams is the top technology priority for most organisations, two thirds of our survey respondents cite budget as the primary barrier to adoption.

Crucially, the biggest obstacles are rarely technological. Legacy systems, skills gaps, internal resistance to change and limited executive buy-in are more commonly holding organisations back. The message is clear: AI success in sport depends as much on culture, strategy and long-term investment as it does on tools and platforms.

Taken together, these findings suggest that the next phase of AI-driven transformation in sport will be defined by proof of return on investment and scalable, mature applications. That is precisely why this report exists – to move the conversation beyond hype, demonstrate where AI is already delivering business impact, and help the sports industry fully capitalise on one of the most powerful forces shaping its future.




# 73%

## say their AI initiatives have delivered tangible value so far

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# Executive Summary



01

## Media and content

The future of sports content is personal, intelligent and immersive

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2. Technology is fueling new creative opportunities
3. AI is driving accessibility and personalisation
4. Data is now integral to live presentations
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# Executive Summary




## 04

## Betting and gaming

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## 05

## Stadiums and venues

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1. 5G comes of age to enhance the in-stadium digital experience
2. Venues are engaging in an audiovisual arms race
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5. Smart stadiums are filling fan data gaps



## 06

## Athletic performance

AI makes sport smarter, safer and more efficient at all levels

1. New data is pushing the boundaries of athletic performance
2. Democratisation of performance tech is narrowing the innovation gap
3. AI has assumed coaching and scouting duties
4. Autonomous officiating is now ubiquitous
5. Tech is professionalising youth and grassroots sport

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# Key survey findings



**78%**

say advanced data analytics will have the most significant impact on the field of play in the next five years

**72%**

say AI is the technology with the greatest potential for their organisation in the next five years

**73%**

of organisations who plan to expand their use of AI intend to do so in content creation and distribution

**60%**

say digital platforms have already unlocked new direct revenue opportunities for their business

**57%**

say enhanced 5G and Wi-Fi connectivity will transform the at-venue experience

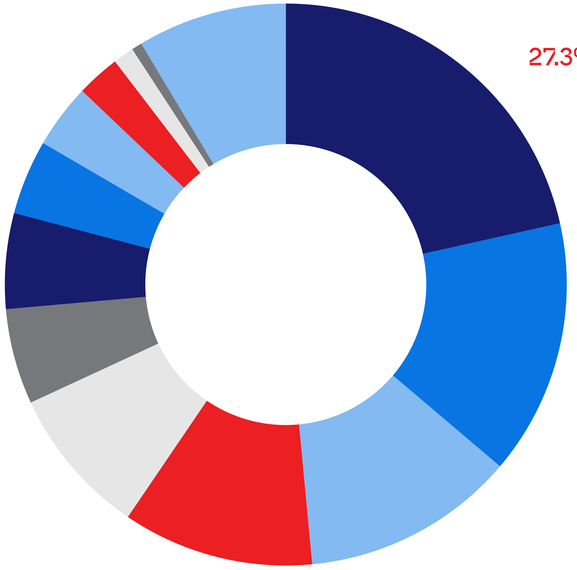
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# Respondent overview



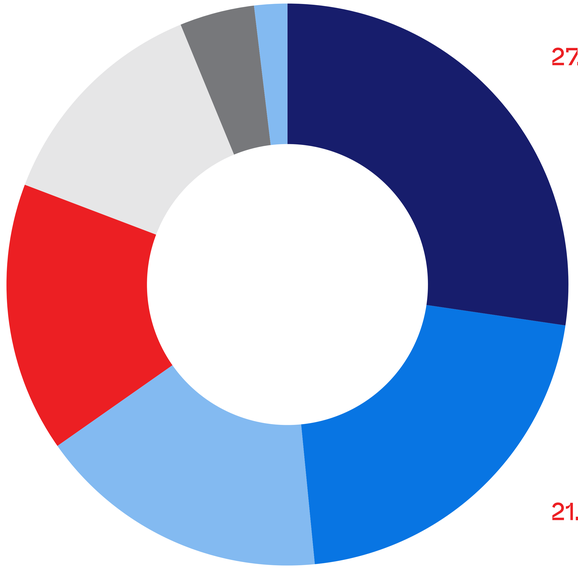
Data and statistics present throughout this report represent the findings from a multi-stakeholder survey conducted in Q4 2025.

## Job function



- 8.6% Other
- 0.6% HR
- 1.2% Finance
- 2.5% Operations
- 3.7% Digital
- 4.3% Partnerships
- 5.5% Sales
- 5.5% Data & Analytics
- 8.6% Media / editorial
- 11% Technology
- 27.3% Executive leadership
- 14.7% Product & strategy
- 12.3% Marketing

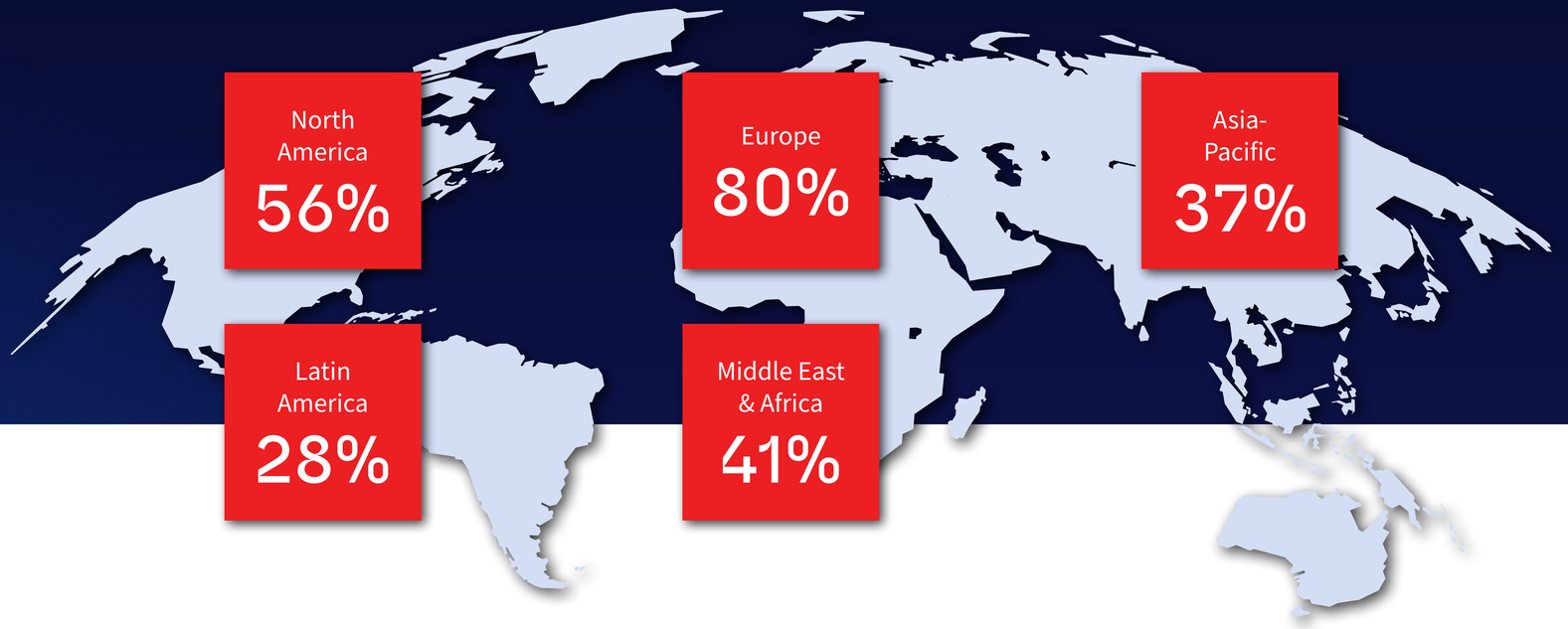
## Job level



- 1.9% Other
- 4.3% Entry level
- 13% Mid-level management
- 15.5% C-level
- 16.8% Head of department
- 27.3% Owner/founder or managing director
- 21.1% VP, SVP or director

# Geographic regions

Respondents could select multiple regions




## Organisation type

| | |
|---|---|
| 32% | Supplier / vendor |
| 23% | Media or broadcaster |
| 12% | Governing body |
| 6% | League |
| 6% | Brand or advertiser |
| 6% | Agency / consultancy |
| 5% | Team |
| 10% | Other |

## Organisation headcount

| | |
|---|---|
| 34.4% | 1-10 Employees |
| 21.5% | 10-50 Employees |
| 8% | 50-100 Employees |
| 6.7% | 100-250 Employees |
| 13.5% | 250-1,000 Employees |
| 10.4% | 1,000+ Employees |
| 4.3% | 10,000+ Employees |

# 01

# Media and content



# The future of sports content is personal, intelligent and immersive

Few technologies have transformed the world of sport more than broadcasting. Television and radio transformed sport from a local, in-person event into a remote, national and even global spectacle - and streaming and digital platforms have accelerated this shift.

**Today, new technologies are unlocking new capabilities in content creation, distribution and consumption.**




Cosm's hi-tech venues immerse fans within sports content

# Key trends

## 01

## Broadcasters want to be both the first and second screen experience

DTC has transformed sports broadcasting, but streaming services cannot be merely digital distributions of a linear feed – they must be much more comprehensive and ambitious in scope to satisfy fan expectations, drive engagement, and improve the bottom line.

Digital video platforms are becoming more interactive and diversified in their content, offering multiple services into a single app to maintain fans' attention for longer and tie them into their ecosystem. The aim is to keep them so engaged they never want to leave and to diversify revenue streams so they are not reliant on a single source of income, be it subscription or advertising.

A multi-faceted approach will help broadcasters capture a wider audience, combat subscription fatigue, and reduce the risk of piracy.




DAZN has added new features to become more than just a streaming service

DAZN, for example, has added new social features, in-app betting, interactive prediction games, ticketing and merchandise. Meanwhile ESPN's new DTC service has added live betting information, fantasy updates, personalised in-game e-commerce and a range of features that expand on the linear feed, including the ability to synchronise the ESPN app with a live stream on connected TVs.

The TV remains the main device for watching sport but more than a quarter of fans use a second screen to enhance their viewing experience. Broadcasters want to be both the first and second screen experience, monopolising fan attention and revenue-earning opportunities.




ESPN positions itself as an all-in-one digital sports destination

## WHAT'S NEXT

### Streaming will redefine the fan experience

The line between broadcast and streaming will fully dissolve in 2026. Traditional broadcasters and tech platforms will converge to deliver unified, data-enhanced viewing experiences that blend live sports, interactivity, and personalisation. Fans will no longer distinguish how they watch, only how connected they feel, as streaming becomes the primary gateway for sports engagement.

# 02

## Tech is fueling new creative opportunities

Interactive television has been possible since the late 1990s but was limited by the constraints of consumer technology and the bandwidth available through traditional distribution. Now, advances in cloud technology, mobile devices, and connectivity are unleashing a new array of creative opportunities and ways to watch sport.

Greater customisation allows fans to personalise their experience while enabling sports organisations and broadcasters to maximise the value of their rights. Multiview capabilities give fans the ability to select multiple live events simultaneously, select their own audio feed and camera angles, and even add their choice of on-screen graphics.



**Chris Roberts**, Director of IT, Formula One

**“Satellite communications is another technology we’re interested in as we’re obviously reliant on fibre. We’re very keen to see where satellite communications will be in the next five years in terms of the amount of data and the latency that’s available to us.”**



F1 team Red Bull Racing used VR to launch their 2026 car

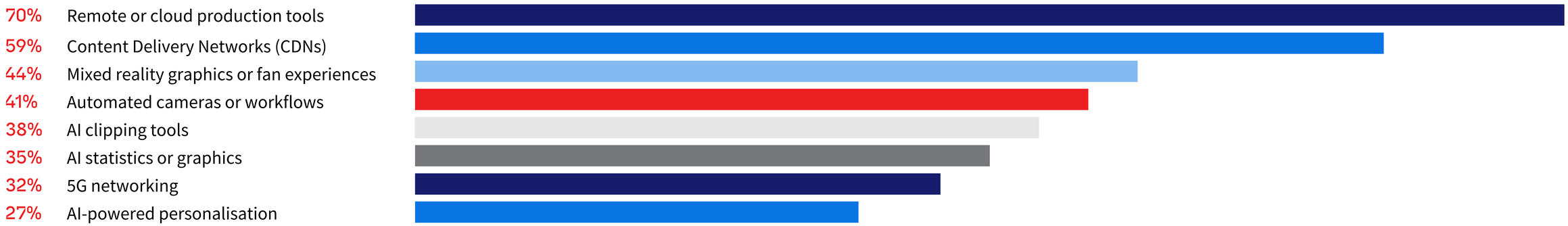


Advances in 5G connectivity have freed cameras from wires. Private 5G and network slicing guarantees a certain degree of throughput and allows operators with untethered cameras to capture footage from anywhere in the stadium – even from the team bus. The next big thing will be 6G, which will deliver even faster speeds, greater reliability and lower latency, powered by a software-based intelligence layer.

Some properties which operate global circuits or work in more rural areas have cited next-generation satellite internet as a future gamechanger. These systems, powered by satellites which are much closer to the Earth, are a significant upgrade from legacy satellite.

AI-powered cameras are also unlocking broadcast-quality live streaming for sport at all levels – from the lower leagues down to youth sports. These single-camera solutions, which do not require a manual operator, send all footage to the cloud where it powers live streams and can be converted into other forms of content, unlocking a range of revenue and engagement opportunities.

## Which of these technologies do you use at your organisation?



# 03

## AI is driving accessibility and personalisation

The entire sports industry is excited about the potential of AI. However, it is in media where the use cases are already the most mature, with intelligent automation helping to make sports content more accessible, engaging, and personalised.

Automation will be crucial as fans demand increasingly personalised experiences and sport must serve multiple platforms, each with their own requirements and behaviour patterns.

AI-powered highlight tools automatically detect the most exciting moments of live events using image and audio recognition technology, sometimes paired with live game data, to categorise footage using metadata and create video packages optimised for specific digital platforms.

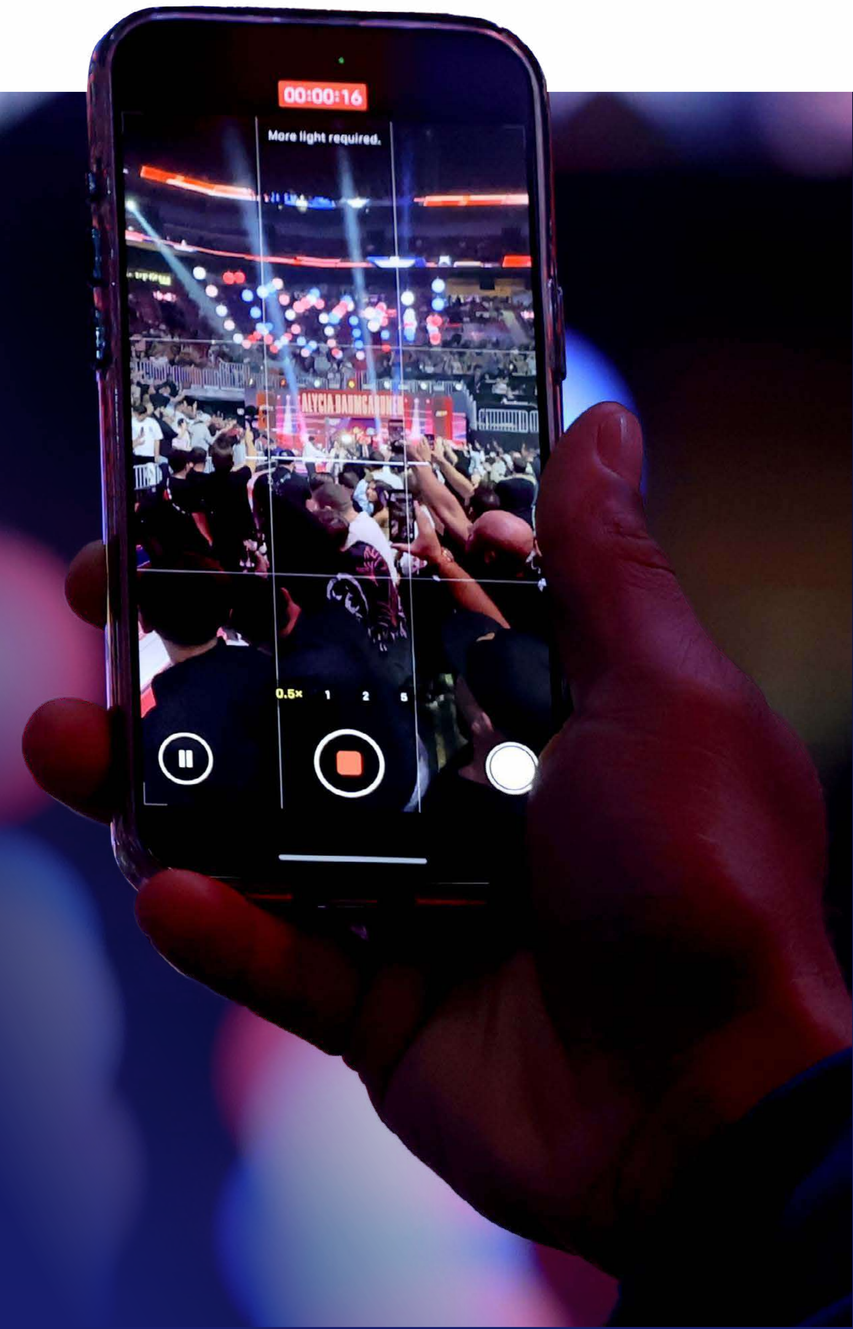
The speed of this process ensures sports organisations or broadcasters can capitalise on interest for a live event – and maximise first-party traffic – and allows them to achieve scale that would be logistically or financially prohibitive using manual methods.



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**Rainer Geier**, EVP, Group Product, Sportradar

**“Increasingly, fans want to know why something happened, not just an explanation of what happened. Applying cutting-edge AI to player tracking data allows us to give fans insights that elevate storytelling, enhance understanding and deepen engagement in the viewing experience.”**



Wimbledon, through its long-standing partnership with IBM, can now produce highlights for every match at the tournament. IBM's algorithms process match data, crowd noise and player reactions to determine the most important events, reducing production time from hours to minutes and freeing up Wimbledon's editorial team to create other types of content.

LaLiga uses WSC Sports platform to automatically generate highlights and create a searchable library of footage that make it easier for the league and partners to create montages of historical moments or clips showing past legends.

The next stage of this process is personalisation. MLB's official mobile app and website now offers personalised video recaps, based on a user's favourite teams and players and how they've previously interacted with content, while ESPN is even creating personalised versions of SportsCenter for its DTC subscribers.

**In the future, GenAI tools will ingest entire video archives, allowing fans to create custom packages simply by entering a text-based prompt, similar to ChatGPT.**

AI is now being used to add spoken word audio to content where it isn't feasible to use a human commentator, such as at Wimbledon where 600 matches take place over the course of the Championships. AI can also translate audio into multiple languages, making content more accessible to global audiences.



IBM uses agentic AI, LLMs and predictive modeling to power real-time insights at Wimbledon and the US Open

# 73%

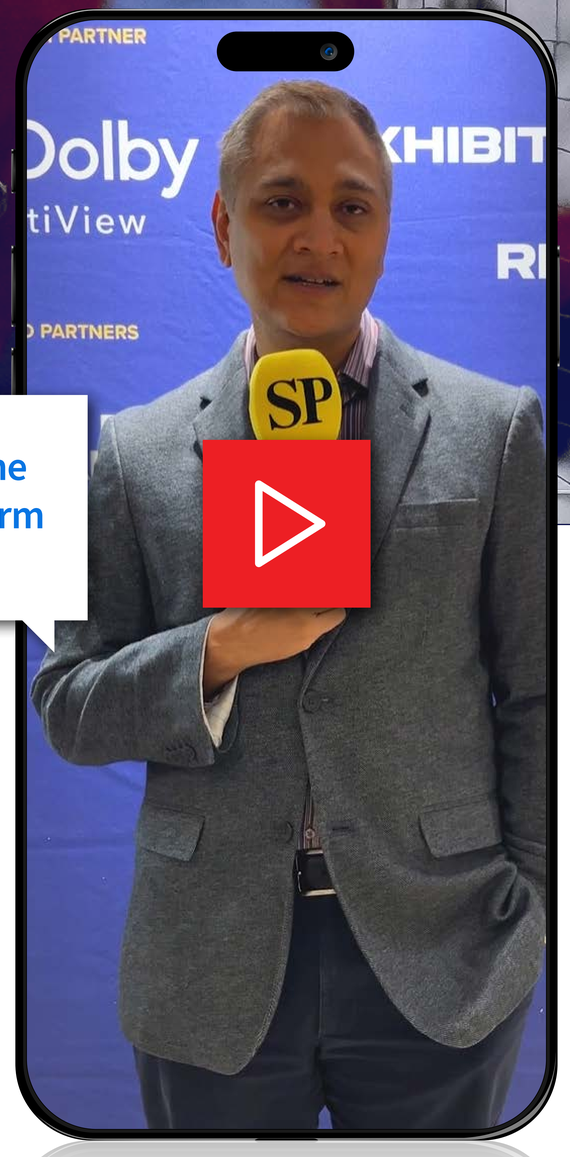
**of organisations who plan to expand their use of AI intend to do so in content creation and distribution**



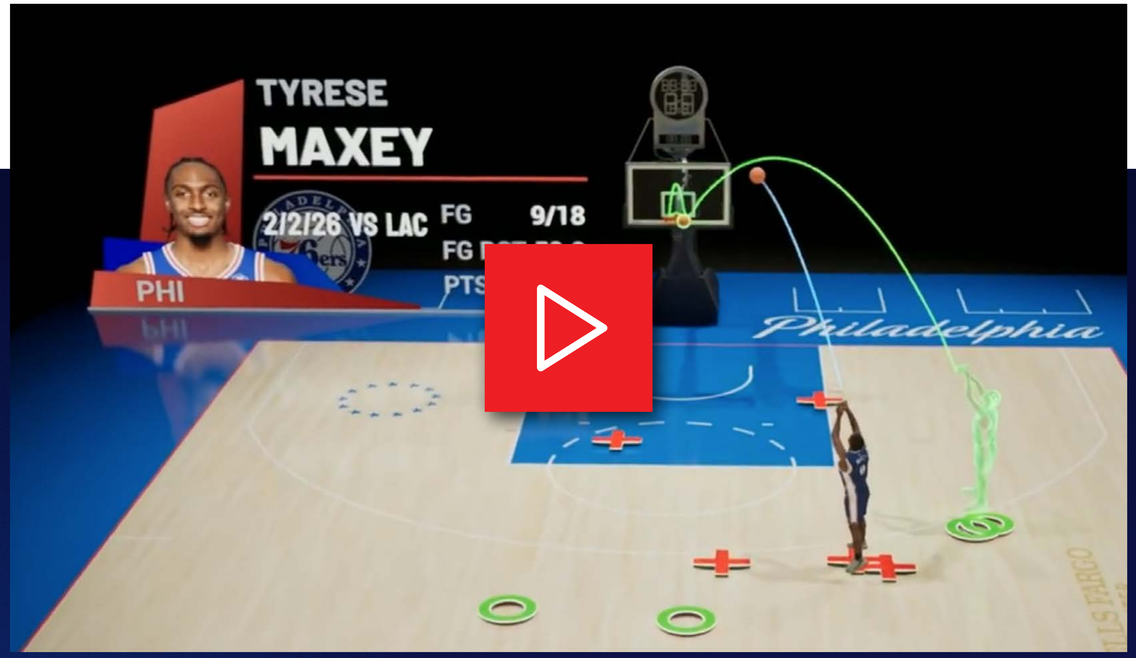
**Dave Lehanski**, SVP, Business Development & Global Partnerships, National Hockey League

“We went from linear to streaming not too long ago but the content didn’t change much. It was the same coverage, the same camera angles. Now with Gen AI, cloud production, digital platforms, and virtual reality, you can create new experiences curated for different platforms. This is going to completely transform sports, because you’re going to be able to deliver the same content but in a format that’s customised to be more relevant to different audiences on different platforms.”

Which technologies have the greatest potential to transform sport in the future?




**Bhavesh Patel**
Global Digital Director,
BeIN Media Group




Sportradar's GameFrame provides dynamic on-air graphics

# 04

## Data is now integral to live presentations

Data is increasingly integral to live broadcasts, helping casual fans and newcomers to the sport understand more about what they are seeing and giving more engaged supporters a more granular level of insight.

Metrics such as 'expected goals' are now regularly featured in live broadcasts, while AI is generating entirely new statistical models and making it easier for rights holders to uncover information that can be fed into on-screen graphics and to commentators, enhancing storytelling. In most cases, the aim is to generate genuine insight and explain what the stats mean, rather than feed raw numbers that provide no context to all but the most data-literate of viewers.

The NBA, NFL and German Bundesliga are just three leagues to have integrated such levels of insight into their presentations. And while some broadcasters are even creating data-driven simulcasts of content, the reality is that these AI-powered enhancements are becoming prevalent in primary telecasts, meeting the expectations of viewers who want to understand not only what just happened, but why it happened – in real-time.

NBC's regional sports networks (RSNs) leverage Sportradar's GameFrame across hundreds of live NBA game broadcasts each season, adding AI-generated, data-driven insights directly into live coverage to deliver visually stunning stories that resonate with today's fans.

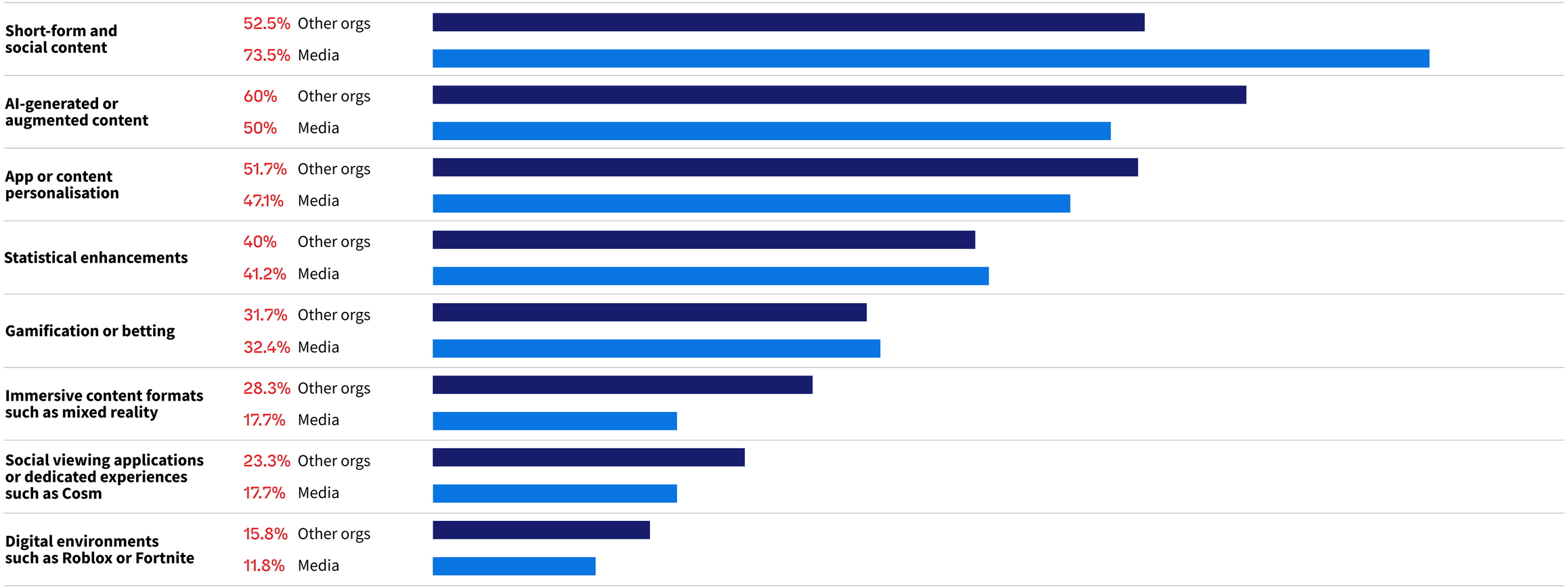
GameFrame uses AI to transform live NBA player-tracking data into dynamic on-air graphics, animated replays, shot charts, and customised digital assets. GameFrame supports in-game analysis and storytelling by helping on-air talent bring greater context and clarity when explaining plays, positioning, and outcomes as the action unfolds.

## WHAT'S NEXT

**Two-way broadcast will mark the next phase of personalised viewing**

The next evolution in personalised viewing will be a shift toward two-way broadcasts, where fans engage directly through voice and other interactive features and receive AI-powered, real-time responses. These capabilities will make sports viewing increasingly participatory, with fans influencing the experience as much as they consume it.

# Which of these areas will have a major impact on your media and content operation?



# 05

## Immersive hardware allows social viewing to become shared reality

It's fair to say that, despite billions of dollars invested by Meta and others, the concept of the sporting metaverse hasn't quite lived up to expectations. Blockchain technology has fallen out of favour, platforms have failed to gain critical mass, and the hardware ecosystem is yet to mature. Yet there are signs that sports fans are keen for more immersive digital experiences.

**Rights holders remain enthusiastic that digital environments and mixed reality applications will transform in-home and at-stadium viewing.**

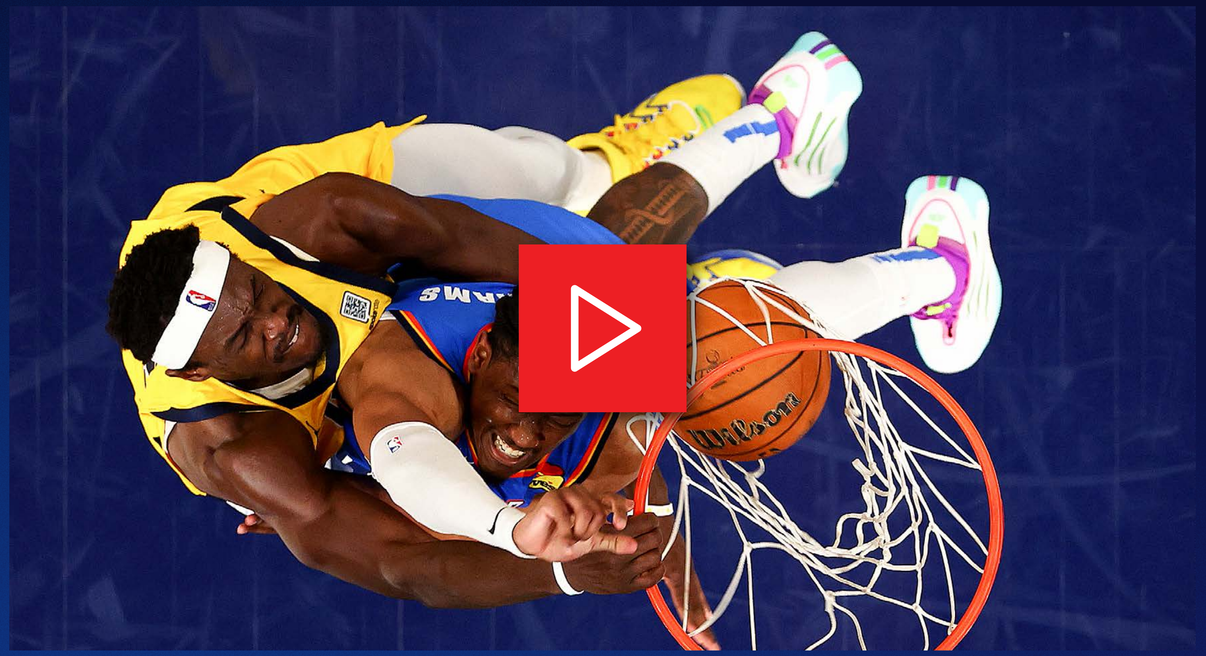
Broadcasters now see technological innovation as a competitive advantage and are increasingly investing in immersive experiences that maximise the value of their rights, boosted by accelerated activity in the hardware ecosystem.

Meta has made significant investments in the space and although the Apple Vision Pro's high cost means it remains a niche product, it has cultivated strong developer support and helped popularise the idea of immersive viewing.

DAZN created an immersive experience for the Fifa Club World Cup, offering viewers a 360-degree view of the action and the ability to overlay data on live pictures. The streamer is adamant that technological innovation can be a key differentiator and believes that one day, it will be able to offer real-time data-driven virtual visualisations of live games.



Apple Vision Pro represents the latest generation of immersive viewing



Cosm's shared reality experience was on show at the 2025 NBA Finals

However, watching a live sporting event with other fans is still the preferred way many viewers wish to consume sport. Social viewing capabilities pioneered during the pandemic are now evolving into 'shared reality' experiences such as those offered by Cosm at its purpose-built facilities.

The company's venues promise to bridge the gap between the physical and virtual worlds through technology – offering an alternative to physically attending a live event.

Each venue features an 87-foot diameter LED dome and every element of the experience is intended to make a fan feel like they are attending a live event, with immersive visuals, authentic food and beverage options, and other venue elements such as merchandise stands. Cosm has partnerships with the NFL, NBA and WWE, as well as broadcasters including ESPN, NBC Sports, Fox Sports and TNT Sports. There are currently two Cosm venues in operation in the US, with three more scheduled to open in the next two years.



Cosm

**Peter Murphy**, SVP, Content and Media, Cosm

**"We're entirely vertically integrated - in the venues we control from a hospitality perspective and we have our own customer experience platform. We do all the structural design, engineering and manufacturing. We have our own system design, rendering engine, spatial management software. We have VR live production services. Our tech team even built our ticketing tech stack. The only thing we don't do is manufacture LED displays, but we design them."**

# Ones to watch

CAMB.AI

## Camb.ai

Media and broadcasting is already one of the most established AI use cases, allowing content teams to achieve previously impossible scale and generate new creative opportunities.

Camb.ai's generative AI models automatically translate spoken word commentary into more than 100 languages, dialects and accents in real time, whilst maintaining the original speaker's voice and tone.

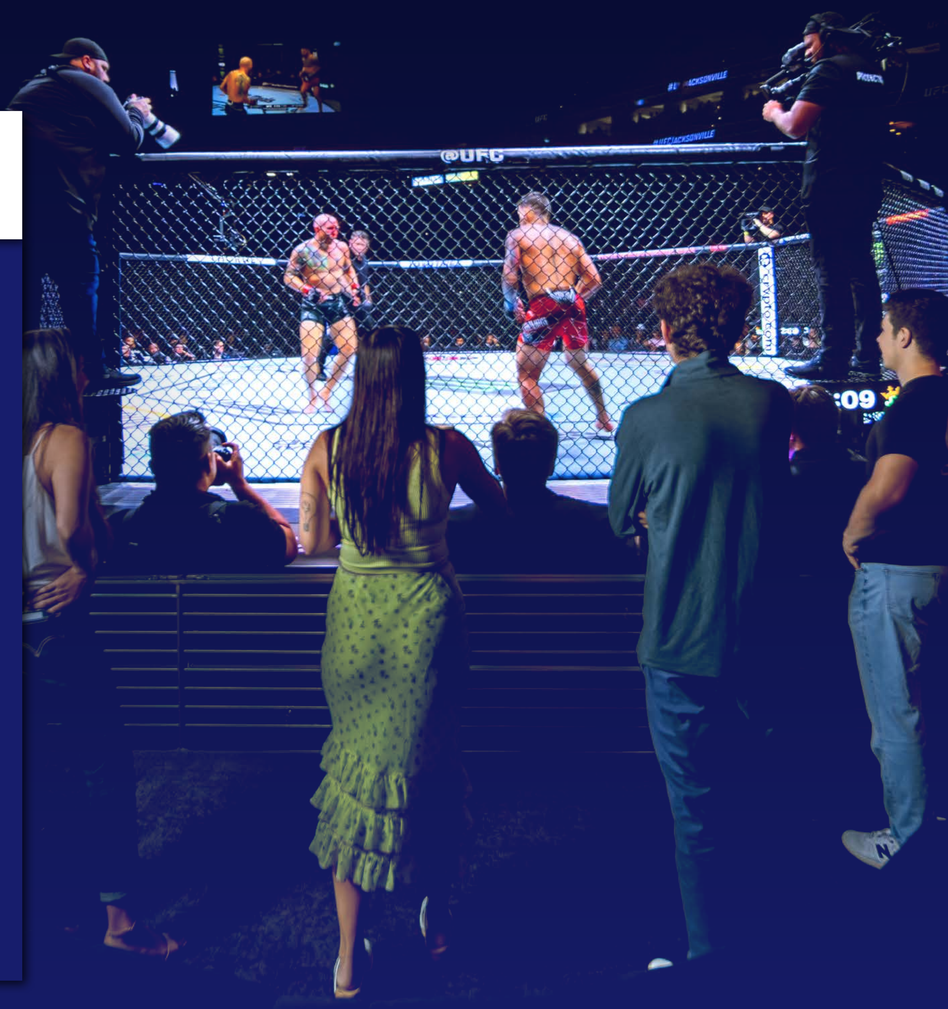
The aim is to help media teams expand the reach of their content and drive fan satisfaction, thus attracting and serving global audiences. MLS, Eurovision Sport and Tennis Australia are already customers.

g

## Grandstand

Athletes are now media brands in their own right, capable of reaching huge audiences on social media using nothing more than their mobile phone. Indeed, digital channels are crucial for many athletes in securing or activating sponsorship or commercial relationships.

Grandstand was founded by Patreon and Dropbox alumnus Sandeep Rajan to make this process easier by offering athletes a creation toolkit along with the ability to foster direct relationships and revenue streams with fans.



# 02

# Fan engagement



# AI and personalisation engineer shift from fan engagement to fan enhancement



Only a fraction of sports fans will be able to attend major events because of geography, affordability, and capacity. Nevertheless, digital technologies allow sports teams, leagues and federations to expand beyond their traditional heartlands and cultivate global fanbases that can be monetised through sponsorship, ecommerce and subscriptions.

These operations are increasingly sophisticated and data-driven and, thanks to recent advances, sport is moving away from traditional methods of digital fan engagement towards a new era of fan enhancement.

**Engagement has shifted from isolated moments to a consistent, seamless journey, with interactions becoming active rather than passive and spanning multiple platforms.**

Harnessing the power of AI, sports organisations are now delivering highly personalised experiences that capture fan attention and deepen audience relationships, opening up new opportunities for more reactive, targeted marketing and direct monetisation.

# Key trends

01

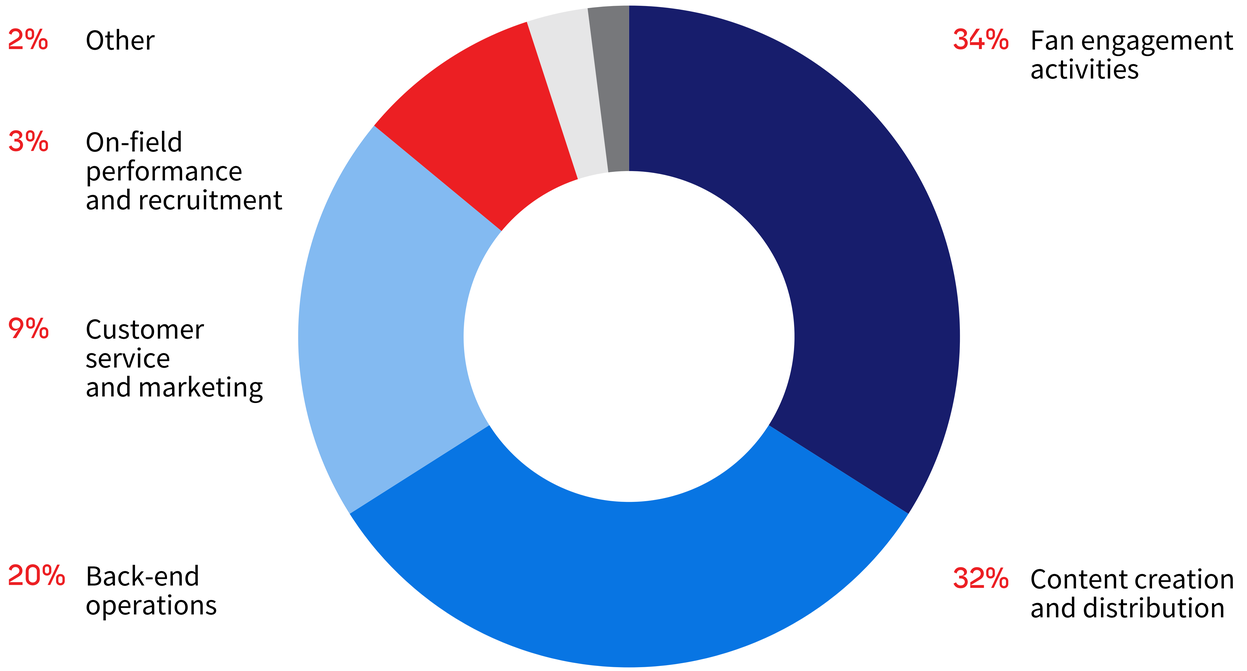
## AI is transforming how sport speaks to fans

Today, conversational AI is transforming how fans and sports organisations interact.

> **As user acceptance grows and generative AI is embedded into key platforms, fans are being increasingly served through voice, chat and personalised assistants that deliver insights, predictions and content in real time.**

One notable example is Premier League Companion, a new AI assistant within the competition's website and app which is powered by Microsoft's Copilot, enabling fans to explore a vast archive comprising over 30 seasons of stats, 300,000 articles and 9,000 videos.

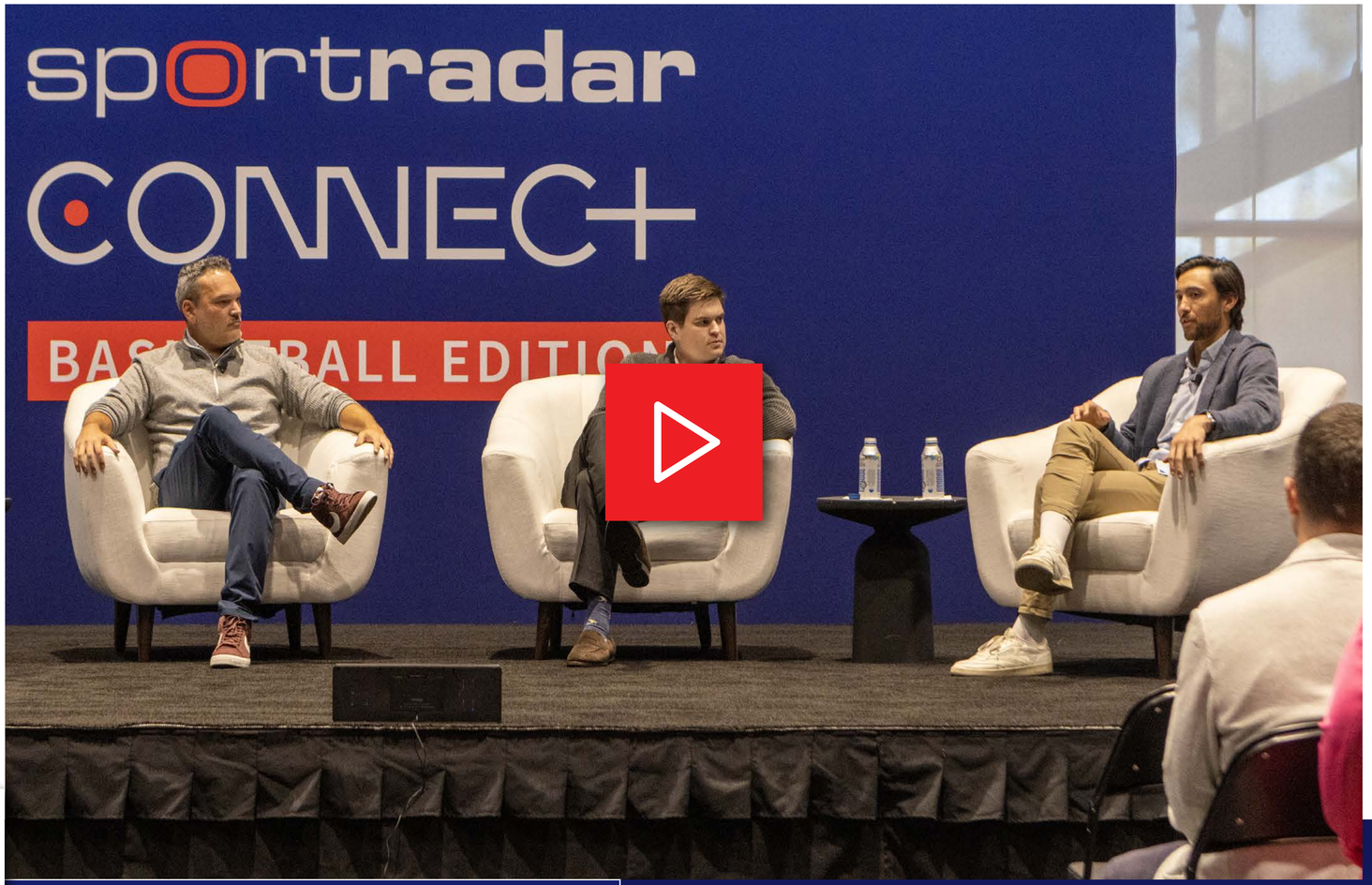
## Which use case has the greatest potential for AI?



AI is also enabling organisations to deliver stats, updates and other information more intuitively. Rather than simply searching for standard information, such as their favourite team's scores and schedules, sports fans are increasingly seeking out more detailed, predictive or contextualised insights, such as how their team is expected to perform or why a certain fixture carries particular significance.

**Google's search engine, a key entry point for sports fans around the world, is designed with this 'what-to-why' transition in mind.**

The company's 'AI Mode' feature and Gemini, its AI assistant, combine search query and contextual data to enable sports organisations and broadcasters to return preemptive results and surface content that provides deeper, more personalised insights.




Google's Grant Delgado discusses 'the art of monetising fan engagement' during July's Sportradar Connect: Basketball Edition event in Los Angeles



Google

**Grant Delgado**, Sports Partnerships, Search & Gemini, Google

# 02

## Real-time moments at scale are the new marketing currency

AI has transitioned from an experimental tool into a core engine of campaign optimisation, unleashing new creative possibilities, more effective targeting, and automated performance measurement.

**Sports properties and their partners are using AI to create vast amounts of content more efficiently and can dynamically evolve campaigns based on real time fan behaviour.**

Accordingly, the next competitive edge will come from activating moments at scale, using live data and AI to detect and activate around key plays and emotions in real time. Marketing success now depends on the ability to blend creativity with context.

Services like Sportradar's ad:s platform, and its sports moments marketing offering, combine precise targeting with live data triggers and dynamic creative capabilities to engage sports audiences with personalised ads when emotion is highest and engagement peaks.



**49%**

**of sports organisations cite enhancing fan engagement and loyalty as a current priority for their technological operation**

# 03

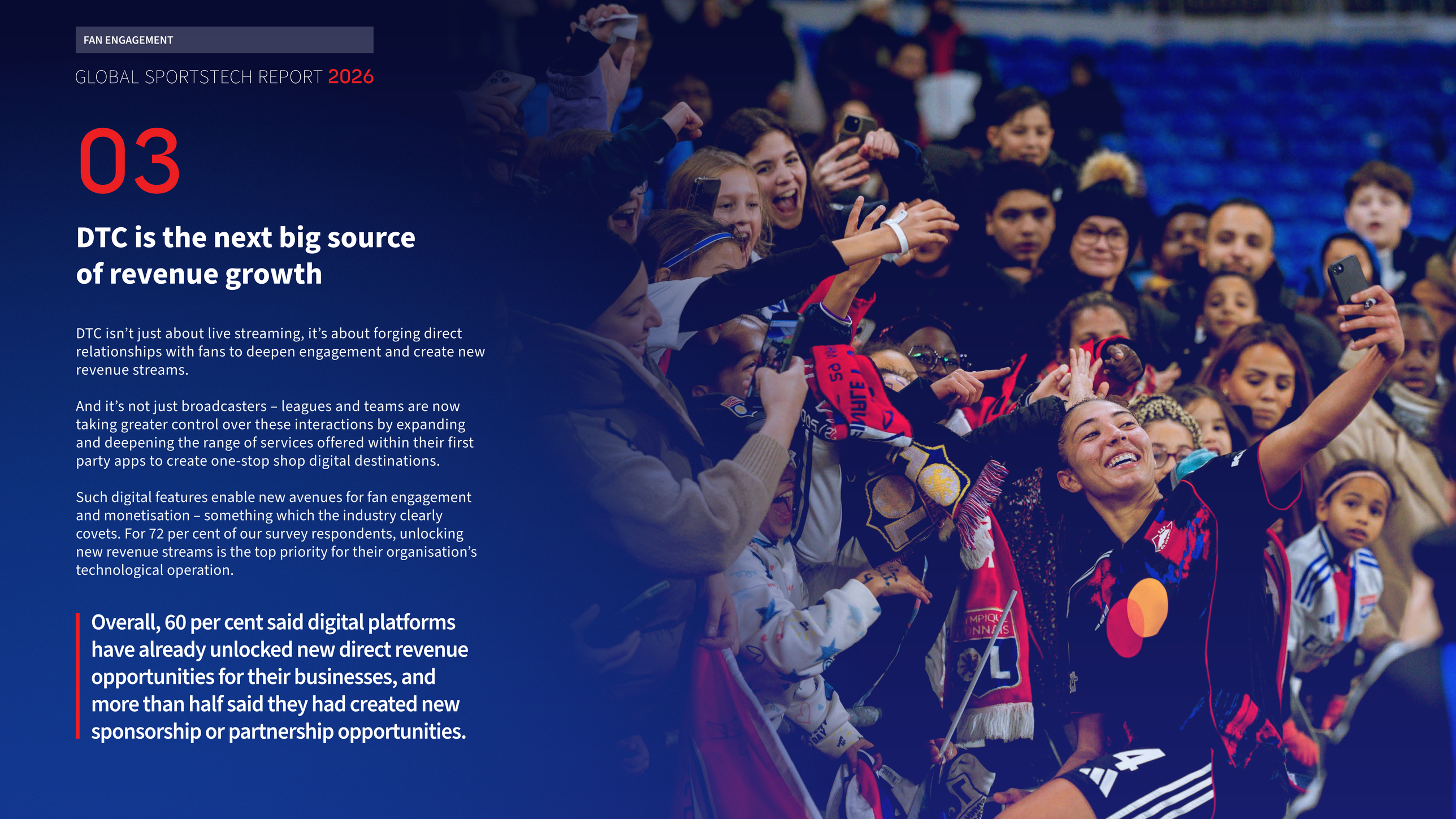
## DTC is the next big source of revenue growth

DTC isn't just about live streaming, it's about forging direct relationships with fans to deepen engagement and create new revenue streams.

And it's not just broadcasters – leagues and teams are now taking greater control over these interactions by expanding and deepening the range of services offered within their first party apps to create one-stop shop digital destinations.

Such digital features enable new avenues for fan engagement and monetisation – something which the industry clearly covets. For 72 per cent of our survey respondents, unlocking new revenue streams is the top priority for their organisation's technological operation.

**Overall, 60 per cent said digital platforms have already unlocked new direct revenue opportunities for their businesses, and more than half said they had created new sponsorship or partnership opportunities.**





Fifa+, the global soccer governing body's DTC platform, is a fitting example. In partnership with DAZN, the live and on-demand content service is being reimagined as 'the global home of soccer', providing a platform for domestic leagues and national associations to stream matches, gain exposure and serve viewers in dark markets. It also allows Fifa to build direct relationships with fans, gathering valuable first-party data that strengthens its attractiveness as a potential partner for brands, while Fifa has also launched a range of mobile games and other digital experiences as part of its DTC push.

## Have digital platforms unlocked new direct revenue opportunities for your organisation?

60% Yes

34% No

6% Don't know

How is technology transforming the EuroLeague's business?




Euroleague Basketball

**Evan Planchon**
Head of OTT (Euroleague TV), Euroleague Basketball

# 04

## YouTube is indispensable but splintering of social media intensifies content challenge

In today's fragmented media landscape, fan attention is spread across a growing array of platforms and content overabundance has stiffened competition for eyeballs. Sports organisations must therefore continually adapt their approach to established and emerging platforms whilst also attempting to monetise engagement effectively.

**For many organisations, YouTube is now a primary content distribution channel, not merely a secondary one.**

Social video services like Instagram and TikTok are increasingly important but Reddit's growth and the emergence of other new platforms that have cultivated sizeable digital communities has only added to the complexity of engaging fans where they exist online.

While great for sharing content and building an audience, third-party social platforms do not enable rights holders to 'own the fan' as most organisations would like. Further complicating matters is ongoing disruption in the space. Tighter regulations, ever-changing algorithms and uncertainty over platform ownership are creating newfound challenges for content publishers.

**Which technology do you see transforming the sports industry?**




TikTok

**Rollo Goldstaub**
Global Head of Sports Partnerships, TikTok

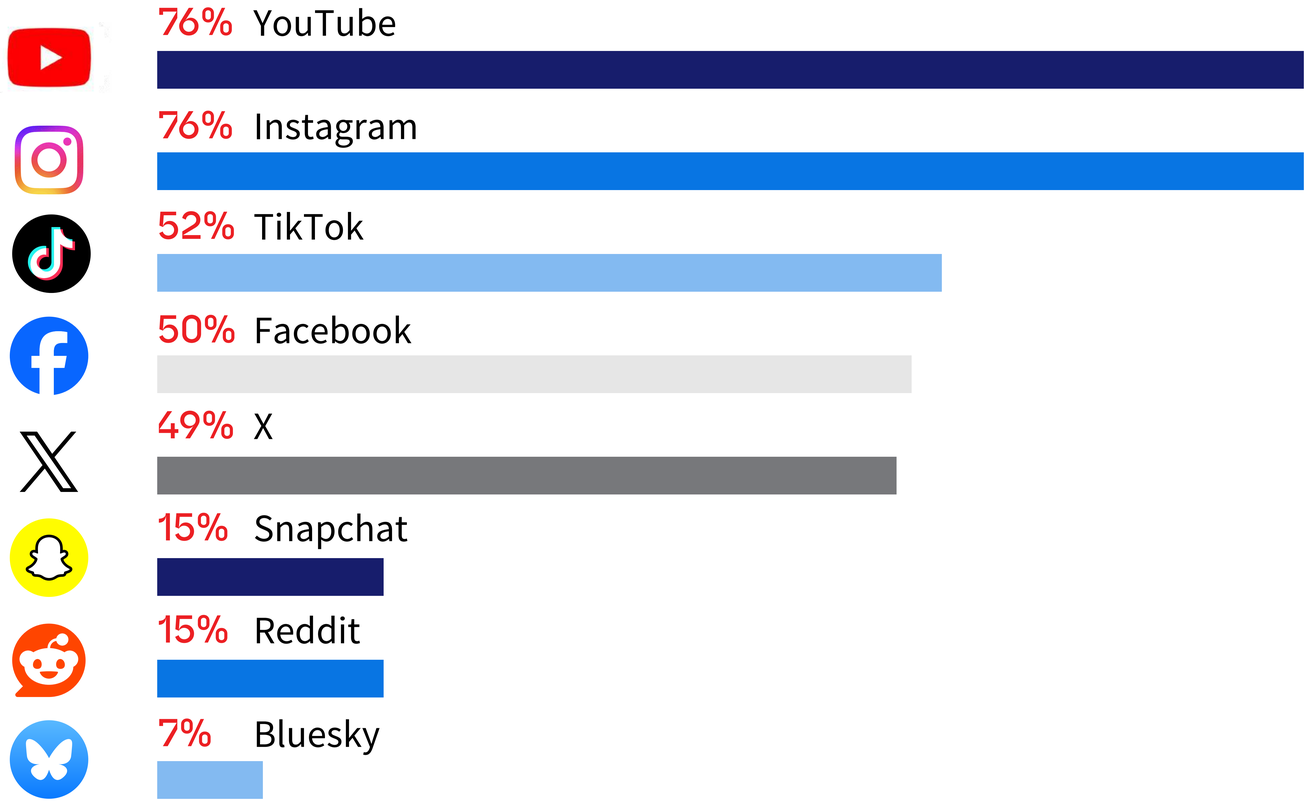
**To reduce reliance on third-party services, owned and operated platforms are being developed that enable organisations to build unified, cohesive digital ecosystems and capture a wealth of user data which can be used to inform fan engagement strategies.**

New marketing solutions such as Sportradar's first-party data marketing offering are also ensuring rights holders and brands can activate sponsorships in the digital space at scale in secure and privacy-compliant ways. Through the use of data clean rooms, multiple stakeholders can also use first-party data to offer hyper-relevant advertising to known fans across the web.

Amid growing fan demand, our survey reveals a willingness among sports organisations to bring more digital activity on to first-party platforms, but the vast majority don't currently have a betting strategy, video game partnership, mobile app or DTC streaming service. That presents a clear opportunity for tech providers who specialise in these areas.



## Which of these platforms form part of your organisation's digital strategy?



# IN FOCUS

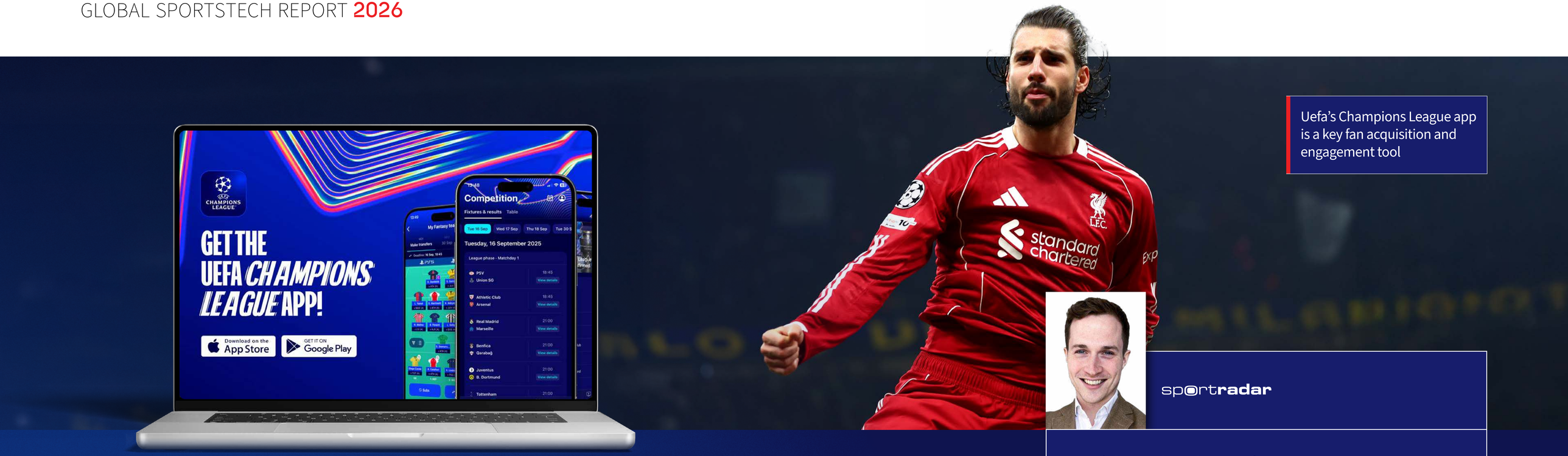
## Uefa and Sportradar's winning formula

Uefa sees social media as one part of a wider digital fan engagement strategy; a top-of-funnel visibility and amplification tool through which fans can be channelled into owned digital ecosystems or the live broadcast. Once users are acquired, the organisation can then develop a deeper understanding of their behaviour and engage them more effectively while adding value to commercial agreements.

"It's about offering seamless utility because we are not just competing for share for hearts and minds but also for time," says Roman Putsch, Uefa's chief of marketing and digital.

> **"It needs to be useful, entertaining and without friction. If you have that activity, it provides the opportunity to commercialise that activity."**






Uefa's Champions League app is a key fan acquisition and engagement tool



sportradar

**Patrick Mostboeck**, SVP of Fan Engagement, Sportradar

**"Once you have a fan's attention and they're willing to spend some of their time and budget with you, the next step is how you can optimise this time and enhance the experience."**

Working with Sportradar, which holds the exclusive betting data rights to European soccer's major club and national team competitions, Uefa aims to attract and retain users by personalising digital experiences and telling data-enriched stories that go far beyond the scoresheet.

For Uefa, that approach means blending fan-sourced insights with usage data from services like its Uefa Champions League app to deliver personalised stats and features that are genuinely additive to the overall experience.

"We've looked at what we need to improve our fan experience," says Putsch. "The way to find out is to actually talk to fans and [pair this insight] with behaviours we're seeing on our digital platforms. In our case, it's helpful to know where you are, how old you are, and it's extremely helpful to know what clubs you support. I emphasise [the plural] clubs because increasingly fans don't support just one.

"We're not going to ask you which players you follow because we have a pretty good idea. If I know where you live, what clubs you support and what national team you may follow, that already helps quite a bit."




# 05

## Digital environments and gaming are vital channels for engagement

Several major leagues are seeking to engage younger fans with branded experiences on Roblox

Metaverse and virtual reality technologies promise to offer the next best thing to being there, but many digital environments have lacked capability and mainstream appeal, leading to a lack of critical mass. However, Meta and Apple's investments in headsets and developer ecosystems are finally bearing fruit.

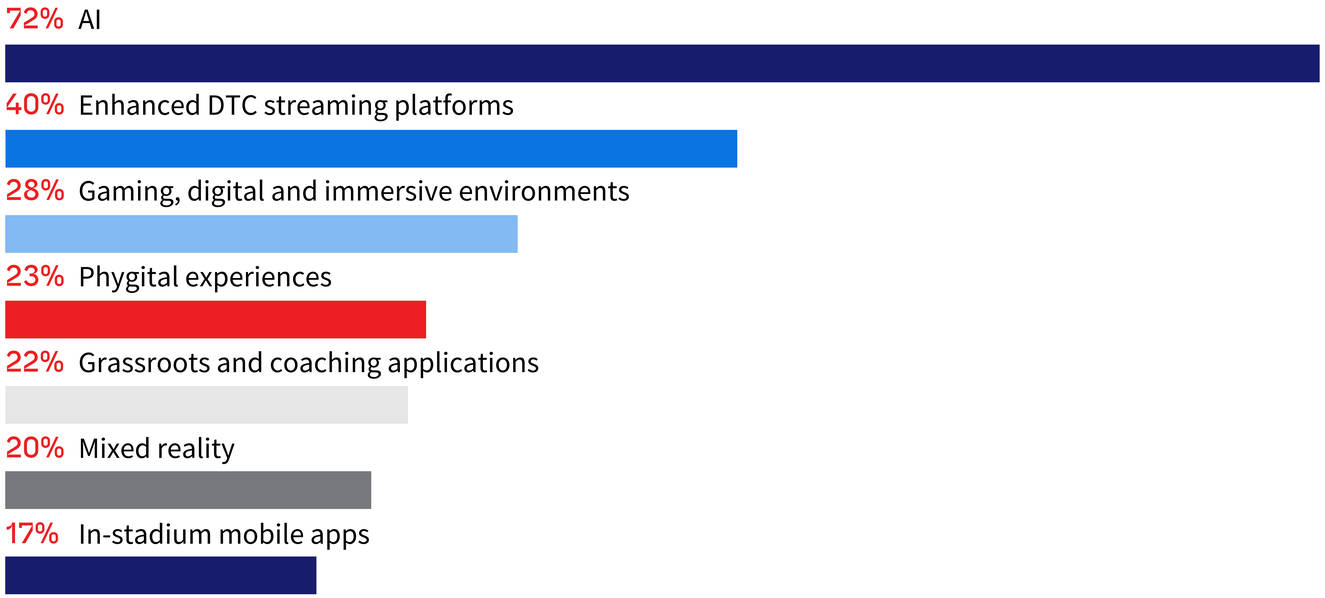
Digital gaming platforms are hugely popular among younger fans. According to research by The Gang, 87 per cent of gamers say playing sport on screen has made them want to attend live events. Roblox sports experiences alone attracted 500 million hours of activity in 2024, representing US$300 million in potential earned media value.

Our survey respondents acknowledge that dedicated metaverse environments could have an impact on their organisations now and in the future, but to date they have failed to capture the imagination. While three quarters of those we surveyed believe the metaverse or digital environments will eventually deliver benefit to the sports industry, 82 per cent said they are not currently active on three of the most popular platforms: Roblox, Fortnite and Meta's Horizon Worlds.

**More than a quarter nevertheless believe gaming, digital and immersive environments have significant potential for their organisation in the next five years.**

Meanwhile so-called 'phygital' experiences that blend physical with digital worlds and mixed reality are both top-of-mind for around a fifth of respondents.

## Which of these technologies have the greatest potential for your organisation in the next five years?






**45%** of sports organisations and brands believe digital environments and the metaverse can help maximise the impact of commercial partnerships



ROBLOX

**Lisa Willett**, Senior Director of Global Partnerships, Roblox

“Sponsored experience will be a huge growth area for us, especially now that the sports IP is largely settled in on the platform. We’ve seen it happening, but we think that that will significantly increase in scale, because it’s not just the sports IP that wants to find the younger fans, it’s the brands that are associated with it. It’s an absolute natural tie-in for a brand to do the real-life sponsorship and then extend it into our platform.”



# 06

## Data-driven digital experiences remain an untapped opportunity

Data collected from optical tracking systems isn't just powering new data metrics and real-time betting markets – it's being used to unlock a range of fan engagement tools that bring these insights to life and create engaging content on digital platforms.

Innovations like Sportradar's virtualised Live Match Tracker can deliver the full story of every match with high precision and minimal latency, functioning either as a second screen experience or alternative to live coverage.

Having access to in-depth statistics and insights, fans can obtain a more immersive, personalised live event experience – being able to focus on particular players, teams or areas of the game that interest them – and achieve a greater understanding of the action than what is possible with static trackers or subjective live commentary.




Sportradar's virtualised Live Match Tracker provides an enhanced understanding of the action

This data is also being used to create accurate digital recreations of live events, putting fans in the shoes of the athletes and allowing them to view key moments with a freedom that isn't possible with just video footage.

**VR headsets can already place fans courtside at a basketball game, behind the tee box in golf, or on the pitch during a live soccer match, offering a completely new way to experience sport.**

Meta's NBA Arena, for example, includes virtual arenas, courtside views of live games, and interactive video games on the Horizon Worlds and Xtadium environments.

Respo.vision's computer vision technology can collect three-dimensional positional data from a single camera feed of a soccer game by tracking 50 different body parts. By digitally recreating a match in 3D through Unreal Engine, Respo.vision allows fans to view key moments from any vantage point, unlocking a new realm of possibilities when it comes to personalised content.





Meta

**Ryan Dornbusch**, Head of Sports and Live Entertainment, Metaverse, Meta

Meta's Ryan Dornbusch explains how the tech giant is offering sports fans more choice using virtual and mixed reality



Respo.vision's 3D recreations are generated using skeletal tracking data and only a single camera feed

This data is even being used to power video games. NFL Pro Era and the Premier League Player, created by StatusPro and Rezzil respectively, are two examples of officially licensed VR games that aim to replicate the matchday experience from the point of view of a player.

While the technology to create such experiences is available, sports organisations are only scratching the surface of what's possible when it comes to extracting maximum value from their data rights. Indeed, could data rights become an alternative to more expensive media rights in the future if the technology evolves enough?

# Ones to watch

## Trickshot

Modern sport is truly reliant on data for everything from recruitment and performance through to backend operations and fan engagement. Trickshot's technology captures motion and volumetric data from live sport and recreates these events in a virtual arena, offering new immersive content possibilities that engage the next generation of fans.

The company is already working with the likes of ESPN, the Australian Open tennis Grand Slam and Meta to create spatial 3D data-powered videos, virtual reality (VR) experiences and metaverse environments.

## StatusPro

Imagine stepping into the shoes of an NFL quarterback ready to receive the ball from his offensive line - that's exactly what StatusPro's virtual reality (VR) technology allows users to do.

Founded in 2020 by former American football players Andrew Hawkins and Troy Jones, StatusPro's technology is used for both entertainment and training purposes, with its most high-profile effort so far being the officially licensed NFL Pro Era. Its clients already include the NFL's Baltimore Ravens and the NFL Players Association (NFLPA), as well as several NCAA teams.

In 2024, StatusPro raised US$20 million in a Series A round that was the largest for any VR firm to date.



# 03

# Infrastructure and operations

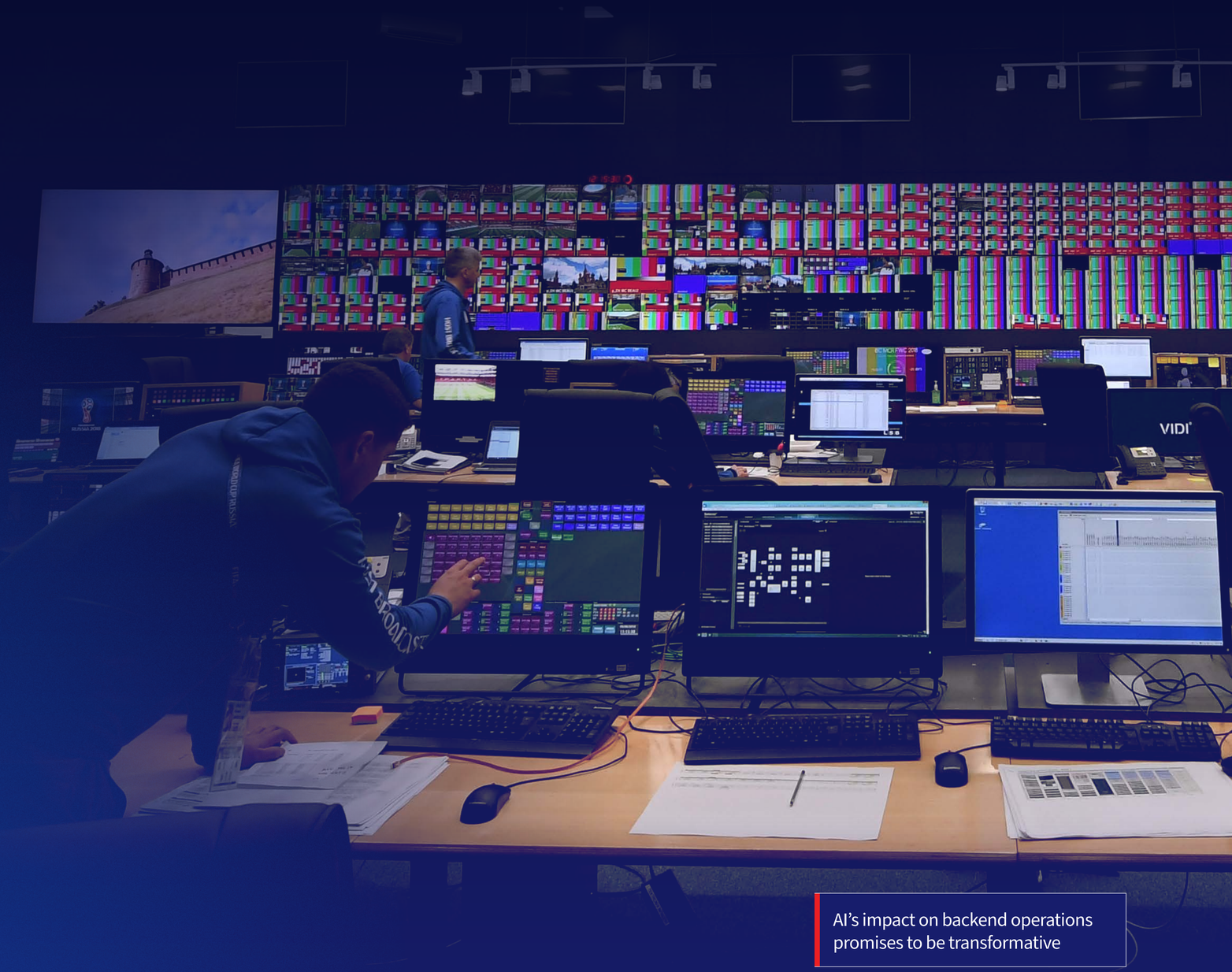


# Sport’s digital transformation is at a crossroads

**Tech is no longer seen as a cost that must be burdened, but a function that actively generates revenue.**

Sport has now fully embraced the world of technology, with advances in cloud computing, connectivity and mobile devices helping to usher in a new era of digitisation and ensuring that even the smallest of organisations has access to enterprise-grade technology.

But sport is at a crossroads in its digital transformation. The past year has seen the sports technology ecosystem adapt to reflect the unique needs of the industry, AI extend its influence on back-office operations, and sport become an active participant in tech innovation.




AI’s impact on backend operations promises to be transformative

# Key trends

## 01

## Sports-specific technologies are meeting sports-specific challenges

The first phase of sport's great digitisation has seen it adopt enterprise solutions that are highly capable and widely proven thanks to widespread adoption and successful deployment in other industries. However, many of these products do not consider the unique requirements of sport, which has fans not customers, where athletic performance is as important as commercial metrics, and where even relatively small organisations have huge priorities.

Leagues, teams and federations are increasingly aware that many multi-industry enterprise-grade solutions are not optimised for their needs or deliver optimal return on investment. In some cases, the challenge of unsuitable technology is exacerbated by the fact that technology procurement is dictated by commercial agreements rather than a competitive process.

Sports organisations need not just best-in-class technology but also bespoke tools that can satisfy both business and sporting requirements and reflect the financial and technological realities of the sector.




**83%**

**of sports organisations believe the technology industry is now adequately serving sport**

# 21%

**of respondents who have already adopted AI cite in-house skills as the biggest barrier to further AI adoption**




The market has responded. Sport is now viewed as a serious vertical by Big Tech, not just a marketing exercise, with collaborative bespoke partnerships and scalable solutions transforming sport at all levels.

Major tech vendors are developing sport-specific verticals and adapting their products so they can capitalise on sport's growing desire for technology.In return they can unlock new revenue streams and seize the marketing opportunities that are created by working with high-profile sports organisations.

According to our survey, most respondents now believe the technology industry is well-equipped to serve sport. The likes of Microsoft and Amazon Web Services (AWS) have entered into truly collaborative partnerships with elite properties such as the Premier League and National Football League (NFL), providing genuine value.

As part of the NFL's Microsoft partnership, all 32 teams have access to Microsoft's full suite of productivity tools, including a unified application comprising communication and collaboration capabilities. And, at the Los Angeles 2028 Olympic Games, Google's enterprise applications will be used to manage a large workforce and more than 70,000 volunteers.

The opportunity is not limited to the elite level either. Digitisation is transforming sport at all levels, whether it's in emerging and niche sports, grassroots leagues, or at youth level. Adobe's sponsorship deal with the Women's FA Cup sees every single club gain access to digital tools to aid with marketing and promotion.

**Across the board, the size of the addressable market within sport for those who can develop and scale sports-specific technologies is growing each year, while sports-native tech firms and startups are vital cogs in the sports technology ecosystem.**



**Chris Roberts**, Director of IT, Formula One

“We need vendors we can trust and believe in. This isn’t a badging exercise – those don’t work for me. [Our partners] are above the door as much as mine is so they’ve got skin in the game. That’s really important because that ensures buy-in to innovate and iterate. You know that when you call them, they’ll pick up the phone.

“The choice of partner is very much about whether they can deliver and meet Formula One’s expectations in terms of speed, innovation, reliability and resilience. Have they got a global reach that means we can tap into them wherever we are.”



# 02

## Trust in AI is growing but barriers to adoption persist

Our findings suggest sports technology leaders are becoming more confident about the potential applications of AI within sport.

AI is cited as the technology with the greatest potential to transform their organisation and nearly all organisations that have adopted AI plan to use more AI within the next 12 months. Three quarters of respondents said their AI adoption had been successful so far.

Trust in AI has been driven by product enhancements and the emergence of tangible use cases as opposed to unrestrained hype.




With budget, internal resources and skills shortages cited among the biggest technology challenges facing sport, AI provides many sports organisations with capabilities that would simply be beyond their means otherwise.

However, the AI landscape is constantly evolving, best practice is still being defined, and not all questions have answers. Many within sport feel undue pressure from executives elsewhere in the organisation to use AI for AI's sake – potentially leading to projects that do not deliver a return on investment – while others are concerned about privacy, ethics and security.

**82%**

**of sports organisations are currently using AI and 98% plan to use it more in the next 12 months**

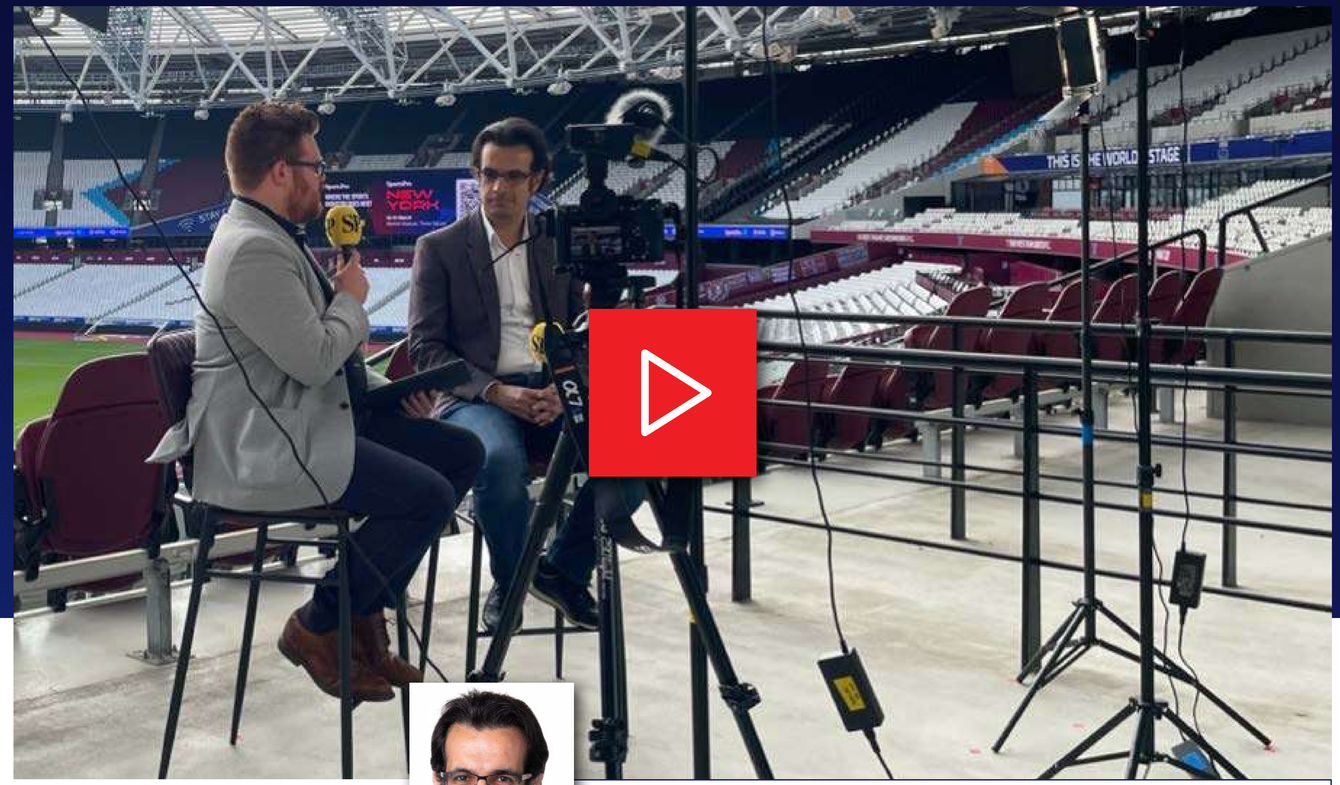
Such matters are considerations for other industries and wider society. But sport's prominent profile, the sensitivity of its data in a highly competitive environment, and the degree of loyalty it inspires among fans intensifies these responsibilities.

**Many sports organisations are now establishing policies or internal steering groups to ensure that AI is used effectively and responsibly. But some have suggested AI will require a complete rethink in terms of how they operate.**

# 66%

**of those respondents not currently deploying AI say they plan to adopt AI in the next 12 months**

Behzadi discusses the "mindset shift" required for organisations to capitalise on the power of AI






sportradar

**Behshad Behzadi**, Chief Product, Technology and AI Officer, Sportradar



**Chris Dix,** Chief Technology Officer, ATP

“You need to be curious but careful. We’ve set policies to make sure AI is used responsibly. Today, it’s easy for anyone to sign up for various AI tools – meeting note-takers, random apps – but we need to know where data is stored, whether the tool is appropriate, and whether we’re creating additional company assets responsibly.

“Our challenge is adopting AI the right way and avoiding unauthorised tools that might look helpful but introduce risks.”



# 03

# AI is at the heart of sports technology partnerships

As sport forges closer ties with the technology industry, and as it seeks as much help as possible to make sense of its intelligent future, it's no surprise that AI is now front and centre of most partnerships.

These relationships are helping sports organisations of all sizes maximise their data assets and gain access to tools that are transforming and optimising their backend operations. Intelligent automation is expanding the capability of the workforce, freeing up skilled staff to work on more valuable tasks, and unlocking new possibilities that deliver revenue or value.

Microsoft's AI tools are being used to aid NFL team departments, human resources, event management and salary cap management, while the NBA's San Antonio Spurs have partnered with OpenAI to integrate ChatGPT Enterprise into their internal workflows. Others are using Gen AI tools to create specialist corporate intelligence tools that empower their workforces.

**AI is now actively being used to manage competitions. Conventional supercomputers have traditionally been used to decide fixture lists, but this role is increasingly being handed to intelligent software that significantly reduces the time it takes to produce results.**

Since the 2024/25 season, the Uefa Champions League has adopted a 36-team league phase instead of a group stage. Without AI, the process of determining which teams play each other on which date would involve a manual draw involving more than 1,000 balls and would take several hours rather than just 30 minutes to complete.



IBM's work with Wimbledon is a prominent use case for AI in sport



04

# Agentic AI is the next big thing

One area that has sports technology leaders especially excited is agentic AI, which is regarded as the third generation of intelligence building on traditional ‘predictive AI’ and the more recent Gen AI.

Agentic AI doesn’t just analyse large volumes of data to predict future requirements or provide advice; it is capable of making autonomous actions. Initially, agentic AI is being used in conjunction with human oversight but proactive AI agents promise to transform everything from operations and event management through to broadcasting and fan engagement.

Golf’s DP World Tour is using agentic AI to help tournament organisers to make better informed decisions, such as marshal deployments, manage grandstand occupancy, and catering demand, on the fly. Agentic AI will also drive efficiencies in fan engagement, ticketing and live results distribution.

Elsewhere LaLiga is working with Sportian to design, deploy and orchestrate AI agents across key organisational domains such as player talent development, content creation, data analytics and operational management, while Major League Soccer (MLS) has built agentic AI into its latest mobile application.



INTERNATIONAL OLYMPIC COMMITTEE

**Alejandro Merino-Madrid**
Head of Artificial Intelligence, IOC

**“We have strict guidelines on how to deploy AI. We want to stay super safe and respect personal rights: for my face not to be used, for my voice not to be used, for biometrics to be respected. We are dealing with that thanks to a very strict governance procedure.”**



# 05

## Sport is not just consuming tech, it’s shaping it

Sports organisations are no longer just passive consumers of technology - they are actively shaping the sector’s evolution through partnerships and financial backing.

> **Teams, leagues and federations are supporting and investing in sports technology companies they believe can help achieve their athletic, commercial and business goals.**

Several organisations, including the NBA, MLS and Australian Open, have established accelerators that give early-stage companies a platform to develop and commercialise their products. Participants gain access to real-world testing environments, access to industry experts and investors, and a high-profile use case to showcase their wares.

Both the NBA and MLS have transformed their All-Star Weeks into showcases for their incubators, meaning that these marquee events are as much about technology as they are about sport. Indeed, the NBA All-Star Technology Summit is seen as one of the biggest dates in the sports technology calendar.

Soccer teams, eager to find any possible advantage, are also getting in on the act, with Paris St Germain just one of several major clubs to establish innovation hubs. Some properties are taking an even more active role by making direct investments. The NBA’s private equity arm now has stakes worth more than US$1 billion, including in Sportradar.

**77%**

**of sports organisations work with tech startups**



**Chris Schlosser**, SVP, Emerging Ventures, Major League Soccer

“Because of MLS’s single-entity structure, we can often make centralised technology investments once for all 30 clubs. All clubs use the same media archive, web management system, and receive all the sports data we generate. Especially in an AI era, where scale and data volume matter, this structure gives us a real advantage in deploying usable AI solutions over the next five years.”

“Our owners are already highly successful in other industries so they are already tech aware. Some are extremely tech-focused and have their own sports technology or venture capital funds they’re running or supporting.

“We give them updates throughout the year on the cohort’s performance and the All-Star Game is an opportunity for them to see first hand what’s happening.”





06

# Cloud provides platform for growth but increases reliance on global players

Cloud computing has transformed the world of IT by providing highly capable, scalable and flexible infrastructure and software available to businesses of all sizes and budgets, eliminating the need to procure, maintain and refresh expensive on-premise equipment.

But that's not all. The cloud makes it easier for applications to speak to one another and share information – essential qualities in an era where data is king, where digital platforms are essential for modern fan engagement, and in which AI promises to transform virtually every element of sport.

This explains why sports organisations are shifting away from legacy IT infrastructure, such as outdated CRM, ticketing and retail systems, in favour of cloud services. However, as significant AWS and Cloudflare outages in late 2025 proved, sport is now increasingly reliant on a handful of major cloud providers.

In most cases, disruption caused by those outages was short-lived. Contingency plans came into effect and access to key services was soon restored, but everything from ticketing and betting services through to semi-automated offside technology (SAOT) and major social networks was impacted.



LaSource

**Jean-Baptiste Alliot**
Co-Founder and Chief Strategy Officer, LaSource

**"Tech stacks will become more consolidated and streamlined to simplify operations and drive efficiency. Success will come from selecting tailored solutions that meet specific needs, reducing downtime and improving integration."**

# IN FOCUS

## Why big tech prizes authentic technological partnerships with sport

Microsoft sees sport as a “uniquely powerful” platform to showcase its full breadth of technology in a highly demanding environment. The immediacy, global reach, and emotional power of live sport create a storytelling platform unmatched in media or entertainment.

However, the company stresses these are no longer mere marketing exercises. Its partnerships must deliver authentic technological impact and provide tangible benefits to both rights holders and fans.

> **“Sport is a true differentiator…it’s where new technology can be used in different ways and when you put fans first, technology fades into the background,” explains Simon Crownshaw, head of media and entertainment at Microsoft.**



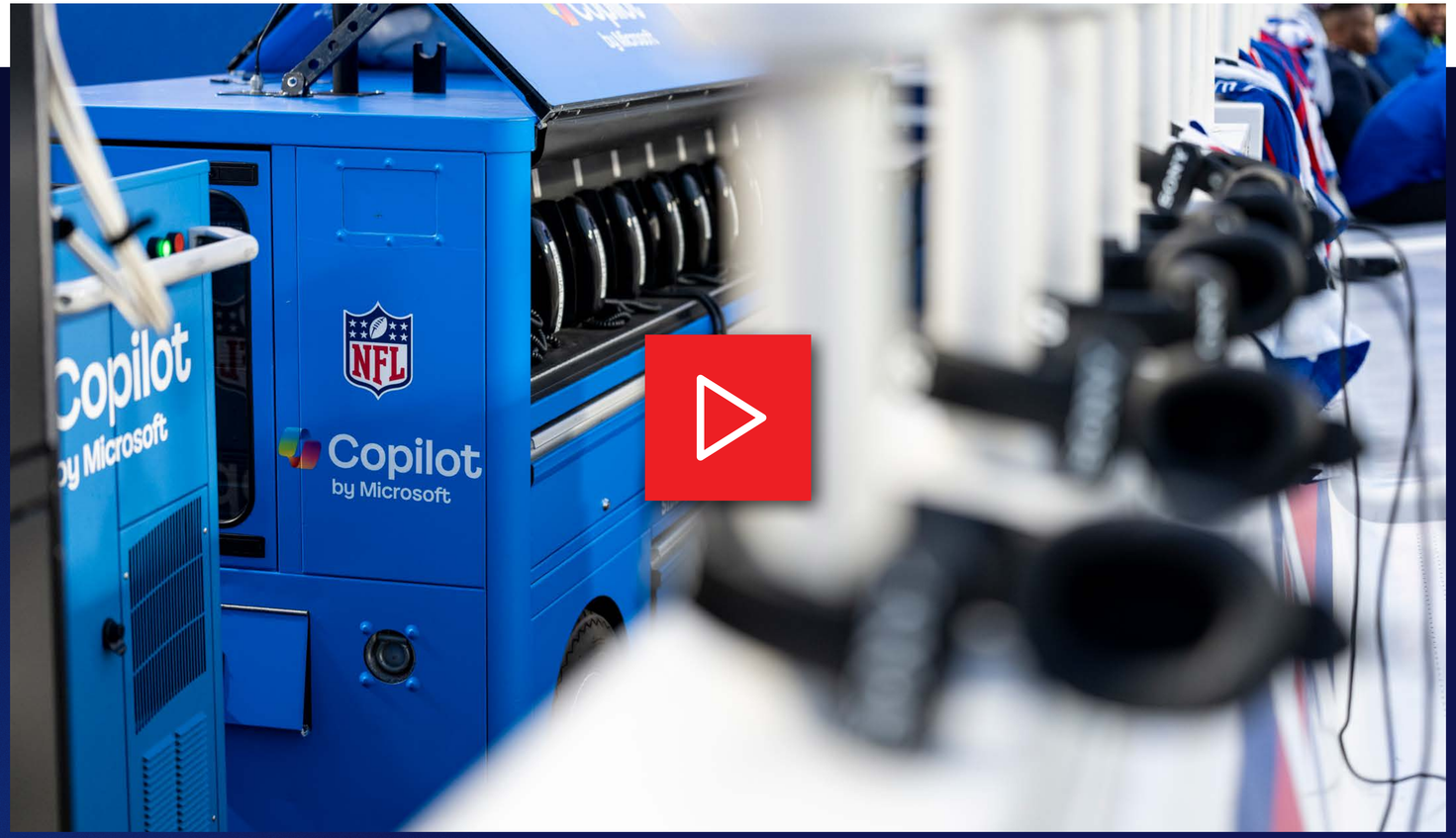
Microsoft selects properties where it believes technology can deliver differentiated value, are willing to work together in a truly collaborative relationship, and how its stack integrates with existing systems.

**Long-term deals give space for innovation, adaptation and gradual rollout of new features. Complex AI-powered systems need time to mature, and longevity allows for shared vision to be realised.**

Indeed, sport allows Microsoft to demonstrate how AI can reinvent broadcasting workflows and operational systems at scale in a fast-moving environment.

“We don’t take a one size fits all approach… It’s not like off the shelf and just make it work,” adds Crownshaw. “It’s a true partnership. We don’t push stuff on them and they don’t dictate to us either.

“Five years is a good amount of time. You’ve got a shared, collective roadmap about where you want to go.”













Microsoft’s AI-powered products are used to enhance the NFL gameday experience

# Ones to watch

## Fastbreak AI

Scheduling a full season is a challenging endeavour for any sports league. Calendars must take into account everything from venue availability to local flower shows and although computers have made scheduling easier, it is still a laborious task that requires significant manual input.

Fastbreak AI's smart scheduling software aims to streamline and simplify the process using mathematical optimisation techniques. Its intelligent algorithms optimise competition schedules to reduce travel time, maximise television audiences and ticket sales, and adhere with local regulations.

The NBA, NHL and TMRW Sports' TGL golf league are investors in the firm, which raised US$40 million in a Series A round in November 2025 to continue development of its smart scheduling software.

## Gemini Sports

Gemini Sports is building an AI-powered cloud-based insights platform for the sports industry, providing data insights that can be used to improve decision-making on everything from performance through to talent identification. The platform integrates with common enterprise applications, and Gemini has partnered with sports data and tech giant Sportradar to bolster the effectiveness of its platform.

Since it was founded in 2021, Gemini's partner portfolio has grown to include the NFL's Indianapolis Colts and US college Texas A&M. It raised US$3.1 million fresh funding in April 2024 to continue its development.

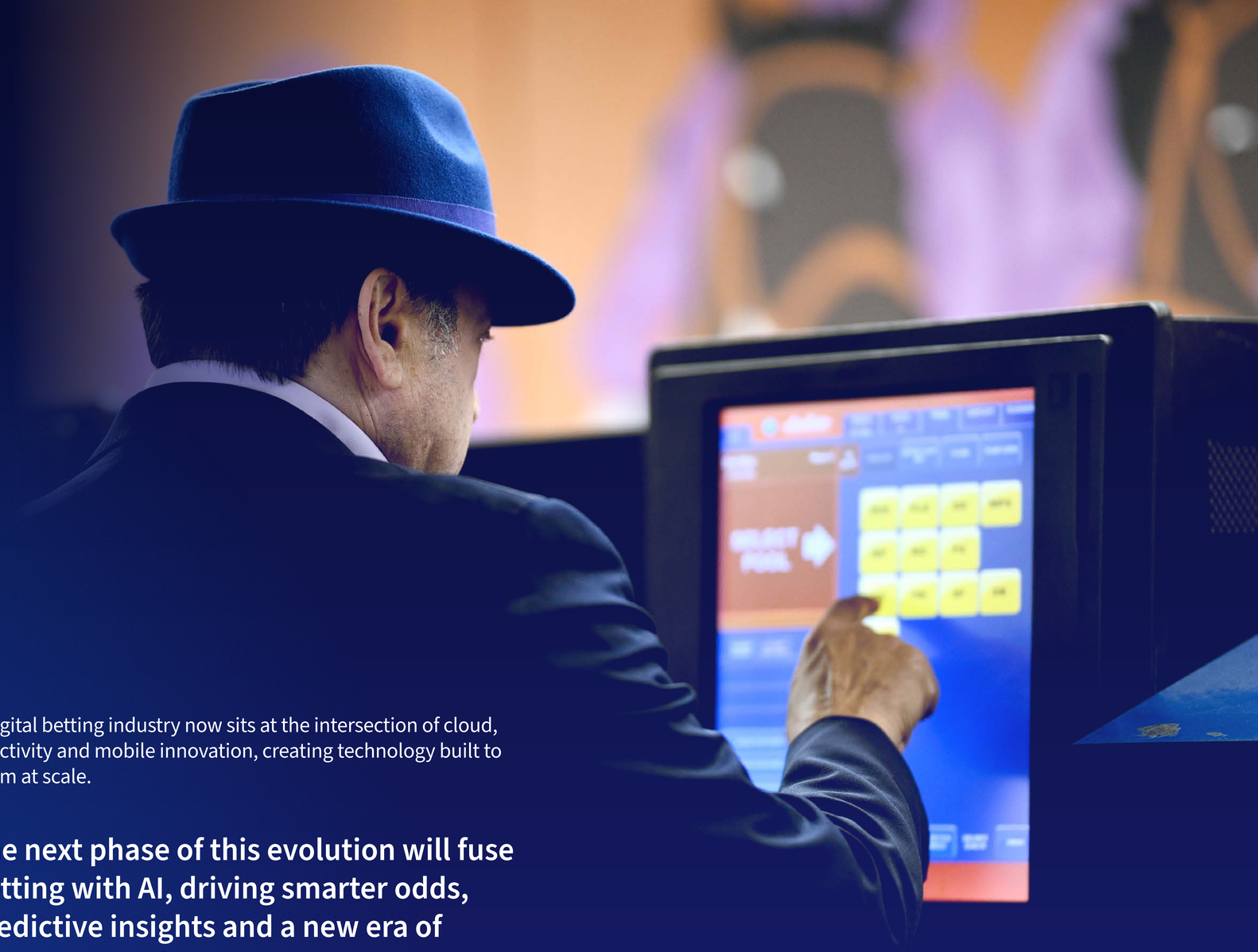


# 04

# Betting and gaming



# Sports betting prepares for era of AI disruption



Technology has reshaped sports betting from a niche, operations-heavy activity into a fully digital, always-on experience.

Online sportsbooks, mobile-first platforms and an expanding range of data-driven products have made betting faster, more accessible and deeply integrated into how fans follow sport. The opening up of the US market accelerated that shift, unlocking investment, driving competition and catalysing technological innovation.

Many of these advances have yielded benefits outside betting, powering analytics, content and fan engagement tools across the wider sports ecosystem.

The digital betting industry now sits at the intersection of cloud, connectivity and mobile innovation, creating technology built to perform at scale.

**The next phase of this evolution will fuse betting with AI, driving smarter odds, predictive insights and a new era of personalised, fan-centric experiences.**




# 31%

**of respondents view betting and gaming as the DTC revenue stream with the greatest opportunity, higher than any other category**

## WHAT'S NEXT

**Predictive AI will redefine how sports are played, watched and monetised**

From real-time data to real-time foresight, Predictive AI will move beyond analysing the game to anticipating it in real time, forecasting player behaviour, optimising strategy, and dynamically shaping fan and betting experiences.

In 2026, predictive models trained on vast, multimodal sports data will truly power decision-making and personalisation across the industry, powering everything from coaching and scouting to live broadcasts and betting markets.

# Key trends

## 01

## AI is powering personalisation for all types of bettor

AI is increasingly central to how betting platforms personalise experiences for everyone from casual participants to highly engaged bettors.

For those new to betting, AI-driven interfaces help demystify odds, identify relevant markets and make it easier to decide what to bet on. Recommendation engines can highlight popular or contextually relevant bets based on live match conditions and user behaviour, thus making betting feel more accessible rather than intimidating.

For more sophisticated bettors, AI models can surface deeper statistical insights, alternative markets and more granular data, encouraging higher engagement and longer sessions. This allows betting operators to serve very different user needs. As competition intensifies, the ability to tailor content, odds and data for individuals is becoming a core differentiator rather than a value-add.






sportradar

**Behshad Behzadi**, Chief Product, Technology and AI Officer, Sportradar

Behzadi explains how GenAI is making sports betting “more understandable and consumable”






LiveScoreGroup™

**Ifran Parvez**, Director of Sports, LiveScore Group

**“One of the main shifts is how we present information. In the past, we flooded customers with everything all at once, which could be overwhelming. Now, we use technology to offer a more streamlined and personalised experience.**

**“Personalisation doesn’t just mean showing the user more of what they want; it also involves removing irrelevant information and creating cleaner experiences.”**

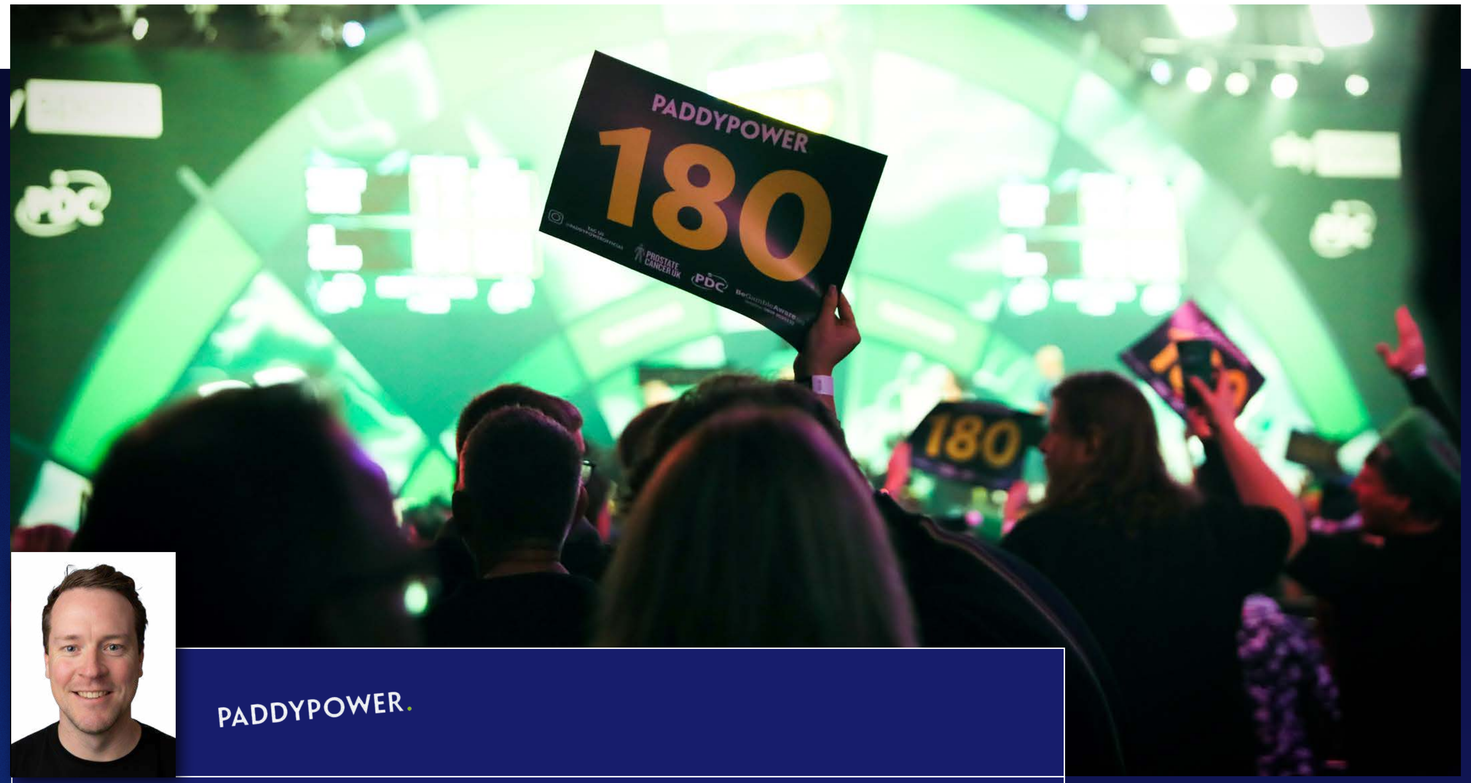
# 02

## Chatbots are enabling conversational communication and complex bet building

Conversational AI is reshaping how bettors interact with platforms, with chatbots increasingly used to simplify navigation and unlock more complex betting behaviour.

Instead of manually searching through markets and filters, users can now describe what they want through text-based prompts, with AI translating that into structured bets. This is particularly relevant for accumulator and same-game parlay bets, which can involve multiple variables and traditionally require several steps to build.

Sportradar has been an advocate of this approach, positioning its Bet Concierge AI match assistant as a way to reduce complexity while increasing engagement.





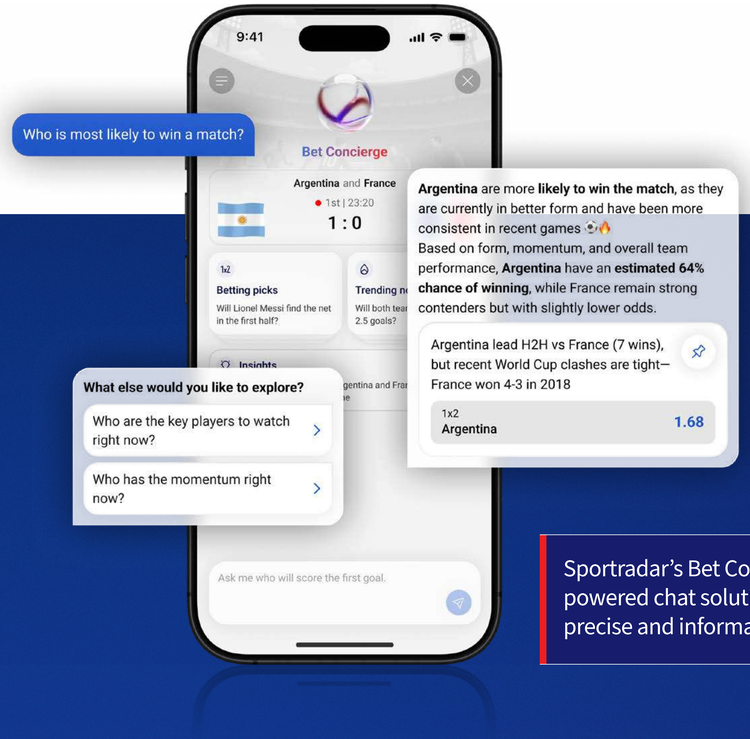

PADDYPOWER.

**Dan Barrett**, Retail Commercial Director, Paddy Power

**“We need to have markets that interest fans – fastest player on the pitch was removed because it didn’t offer fun. Other markets offer value but fans can’t price it up themselves. AI can help create these markets and provide context to fans and encourage them to place wagers.”**

Chatbots also make it easier to scale, providing real-time support, education and bet-building assistance without the cost of human intervention. Over time, these tools are likely to become more proactive, suggesting bet combinations based on live data and user history.

As conversational AI improves, betting is shifting from a transactional experience to a guided, dialogue-driven one.




Sportradar's Bet Concierge is a Gen AI-powered chat solution designed to provide precise and informative answers






sportradar

**Darren Small**, SVP, Managed Trading Service, Sportradar

**"If you have more than 250 event markets on a web page at any one time, it's hard to navigate. With the agentic AI revolution, we can change the way end users actually get to their end destination more quickly or at least just make it cleaner than it is today."**

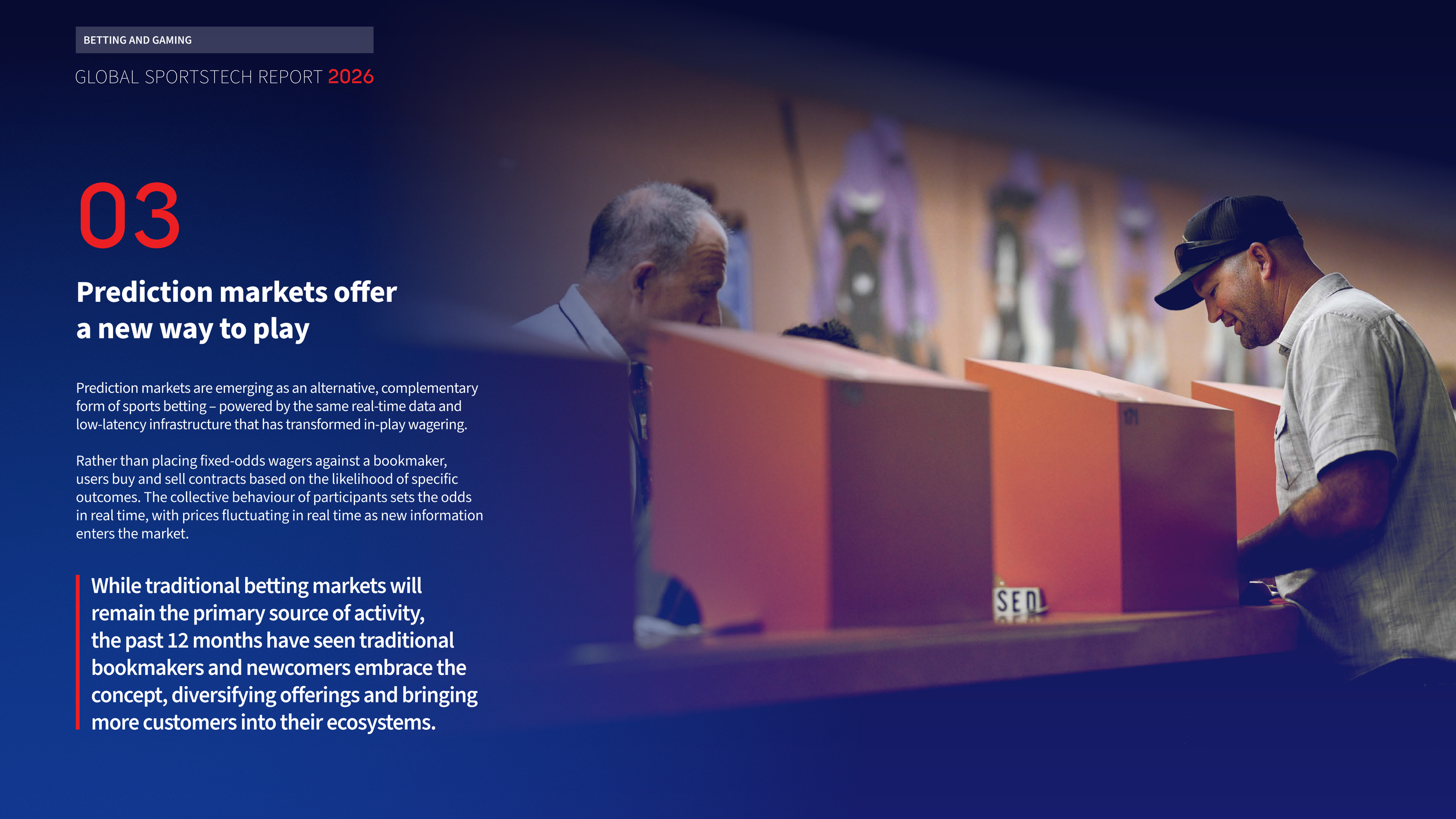
# 03

## Prediction markets offer a new way to play

Prediction markets are emerging as an alternative, complementary form of sports betting – powered by the same real-time data and low-latency infrastructure that has transformed in-play wagering.

Rather than placing fixed-odds wagers against a bookmaker, users buy and sell contracts based on the likelihood of specific outcomes. The collective behaviour of participants sets the odds in real time, with prices fluctuating in real time as new information enters the market.

**While traditional betting markets will remain the primary source of activity, the past 12 months have seen traditional bookmakers and newcomers embrace the concept, diversifying offerings and bringing more customers into their ecosystems.**






# 04

## Sports media and betting convergence is gathering pace

Betting operators increasingly want their platforms to function as all-in-one sports destinations, combining wagering, live scores, statistics and editorial content in a single environment.

> **The logic is clear: the more time fans spend on an app, the more opportunities there are for engagement, cross-selling and retention.**

Many sportsbooks now resemble media products as much as betting destinations, with data visualisations and constant updates designed to mirror the live sports experience and compete with social and broadcast platforms.

Live streaming is now a core component of this proposition. Tennis has been particularly successful because it offers a vast array of in-play markets. Meanwhile, betting sites have been effective routes to market for sports seeking a wider audience given the absence of paywalls and the ability to expand into international markets.

Sports organisations are increasingly aware of the value and potential of their betting streaming rights and are now signing comprehensive global deals, while AI-powered cameras and distribution technologies are delivering a greater volume of video feeds in higher quality.

Video feeds with betting-specific graphical overlays are also attracting viewers and driving activity, while a wider array of in-play markets, catalysed by AI and microbetting, is encouraging more fans to watch live events with a betting operator.

**38%**

**of media companies plan to integrate betting into their broadcasts**

# 05

## Betting data continues to drive fan engagement activities

The same real-time data feeds, probability models and visualisation tools that power in-play betting are now being repurposed for broader fan engagement experiences. Media companies, leagues and teams are using data to enhance live broadcasts, second-screen products and digital platforms with richer statistics and predictive insights.

This shift reflects a growing recognition that fans want context as much as content. For instance, win probabilities, which were once reserved for bettors, are now presented in ways that inform and entertain general audiences.

As data becomes more accessible and visual storytelling improves, the line between betting intelligence and fan-facing insight continues to blur. Betting remains a major driver of innovation in sports data and its impact is being increasingly felt across the entire fan experience.

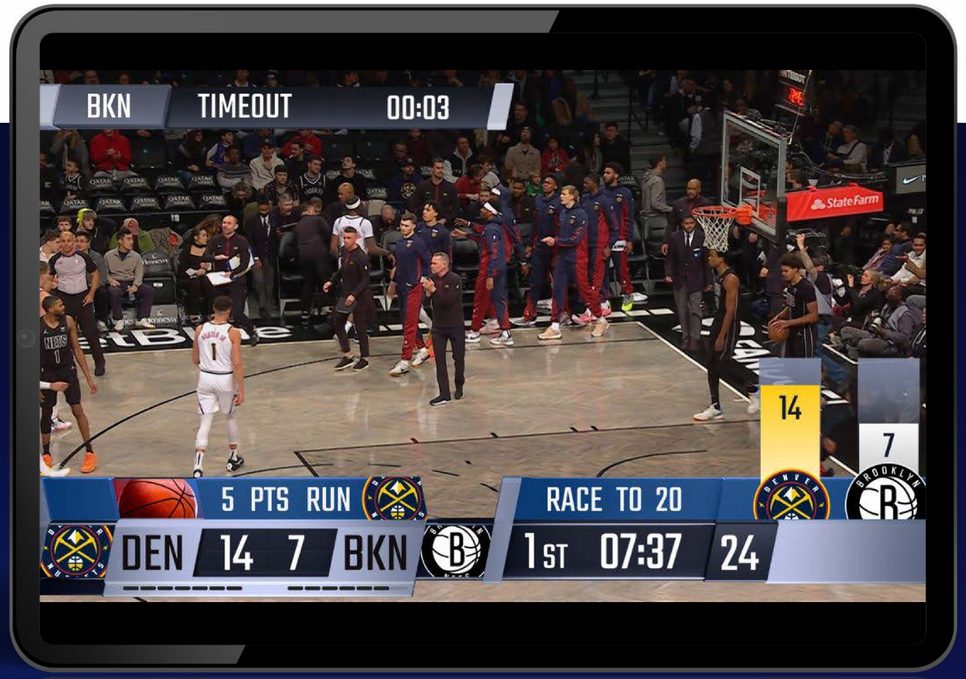



**77%**

**of respondents say their organisation does not have a betting strategy in place**

# IN FOCUS

## How Sportradar and the NBA help fans make informed betting decisions in real time




4Sight uses AI to create animated, contextualised data overlays

Given sportsbook operators want to engage fans more deeply and for longer, Sportradar has developed a streaming overlay designed to provide bettors with more insights for informed decision-making.

While watching NBA streams on betting operator websites, fans may notice the presence of the company's proprietary streaming technology known as 4Sight. Already introduced for tennis streams, it produces data graphics for a live sports stream using real-time information.

4Sight uses AI, machine learning and computer vision technologies to process a huge amount of data and conjure up contextually relevant analysis of the game. From there, animated overlays are created to present the information, which can be visualised within a live stream.

"Our AI models within Sportradar 4Sight process an unparalleled depth of data to engineer contextually relevant insights, which are visualised within a live stream and delivered at low latency so that, essentially, punters can bet on it," explains Patrick Mostboeck, senior vice president of fan engagement at Sportradar.

As well as enriching the viewing experience of a game stream, the graphics help to educate the audience further about what they're watching. The insights can help punters predict what will happen next during a game and to understand why a certain action may be considered important in the context of the matchup.

**For sportsbooks seeking higher engagement rates, this will help to keep fans watching games, while also unlocking new revenue opportunities as they consider whether or not to place more bets.**

"From a bettor's perspective, it is clear that the data points that we showcase in 4Sight help them to make more informed decisions," says Mostboeck, "but also allows them to discover additional betting opportunities, especially with a focus on in-play bets."

# Ones to watch

## Lucra Sports

Lucra Sports is a peer-to-peer sports gaming platform that enables users to compete directly against friends rather than wagering against a traditional sportsbook.

The company's technology supports free-to-play and real-money contests, allowing partners to tailor experiences based on regulatory environments and audience preferences. By focusing on social competition, Lucra positions betting as a community-driven activity rather than a purely transactional one.

Investors include SeventySix Capital, as well as multiple team owners and athletes, such as Arthur Blank and Giannis Antetokounmpo.

## Underdog Fantasy

Underdog Fantasy Sports' daily fantasy sports platform is built around simplicity and speed. It serves up streamlined 'pick'em' contests, where users make predictions on individual player performances alongside traditional season-long, weekly and daily fantasy formats through its 'Best Ball' offering.

This simplified approach has allowed Underdog to scale rapidly, particularly among younger audiences who are less interested in traditional season-long fantasy leagues.

Founded in 2020, Underdog has raised significant venture funding, including a US$35 million Series B round in 2022, which was led by led by BlackRock and Acies Investment and gave the company a valuation of US$485 million.

## nVenue

Micro betting is widely viewed as a key growth area for sports wagering, particularly for live broadcasts where fans increasingly expect interactive, second-screen experiences.

Currently used in Apple TV's MLB coverage, nVenue's in-play micro-betting technology allows sportsbooks and media partners to offer wagers on highly granular outcomes, such as the result of the next play, using real-time data and automated pricing.

The technology is designed to integrate directly into betting and media platforms, reducing latency and operational complexity for partners looking to scale live betting offerings.

# 05

# Stadiums and venues





# Tech-infused arenas are bridging the gap between the digital and physical worlds

**Nothing can ever replicate the atmosphere and feeling of watching live sport in a stadium with tens of thousands of other fans.**

But the challenge for venue operators is to convince fans that visiting a stadium or arena is worth paying for again and again, whilst also matching and expanding upon the digital experience they receive at home.

This means making the journey from home to seat as seamless as possible by addressing pain points and making it easy to get connected, make purchases, and enjoy their day. Today, technology is at the heart of the modern stadium, attracting and entertaining fans, unlocking new revenue streams and maximising home advantage.

Live sporting events are now tech-enabled digital experiences

# Key trends

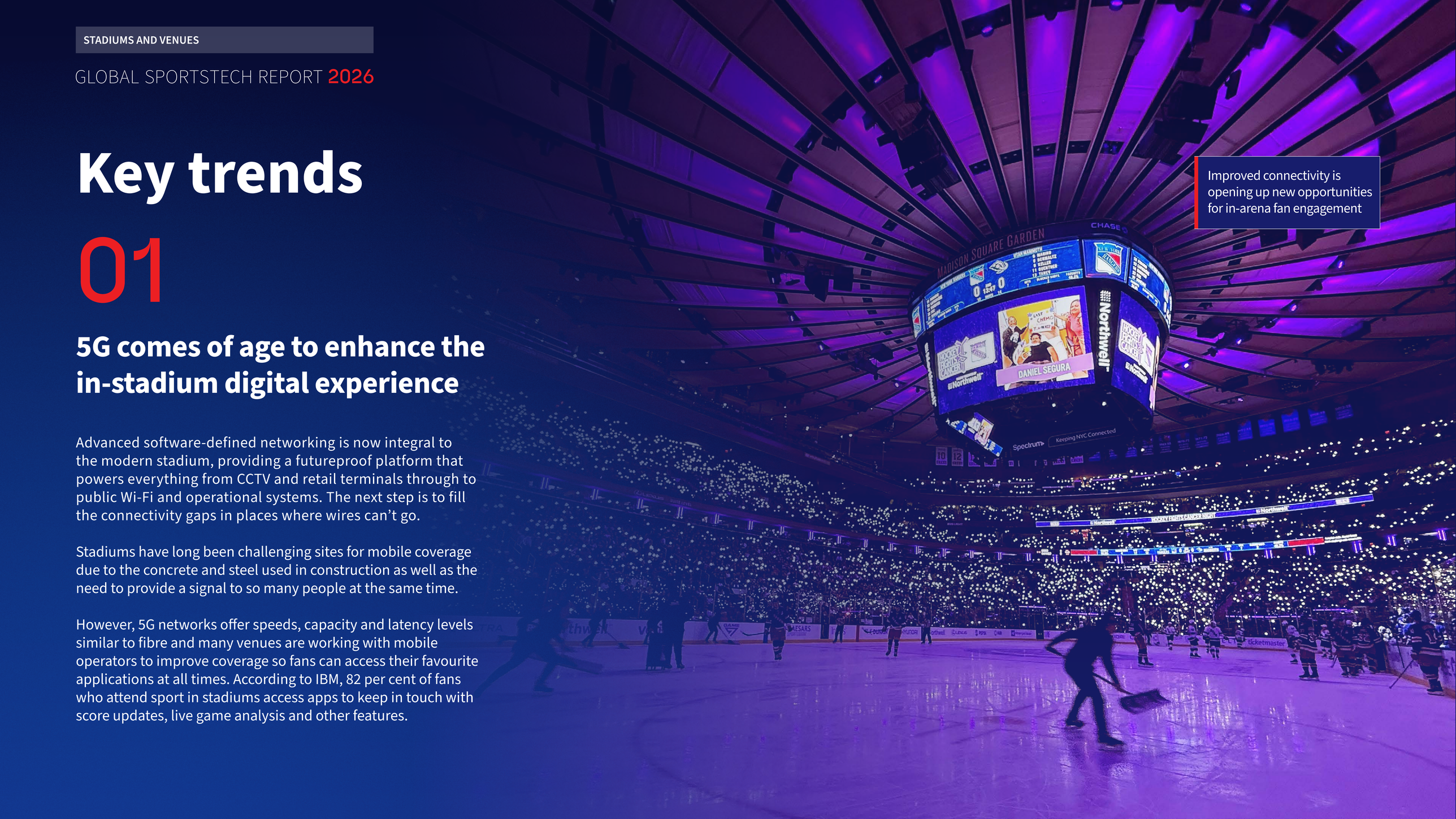
01

## 5G comes of age to enhance the in-stadium digital experience

Advanced software-defined networking is now integral to the modern stadium, providing a futureproof platform that powers everything from CCTV and retail terminals through to public Wi-Fi and operational systems. The next step is to fill the connectivity gaps in places where wires can't go.

Stadiums have long been challenging sites for mobile coverage due to the concrete and steel used in construction as well as the need to provide a signal to so many people at the same time.

However, 5G networks offer speeds, capacity and latency levels similar to fibre and many venues are working with mobile operators to improve coverage so fans can access their favourite applications at all times. According to IBM, 82 per cent of fans who attend sport in stadiums access apps to keep in touch with score updates, live game analysis and other features.




Improved connectivity is opening up new opportunities for in-arena fan engagement

Wembley Stadium has long been a network testbed for UK operator EE, Marseille's Stade Vélodrome is equipped with Orange's 5G antennas, and the Tottenham Hotspur Stadium in London has its own private 5G network that operates independently of public infrastructure.

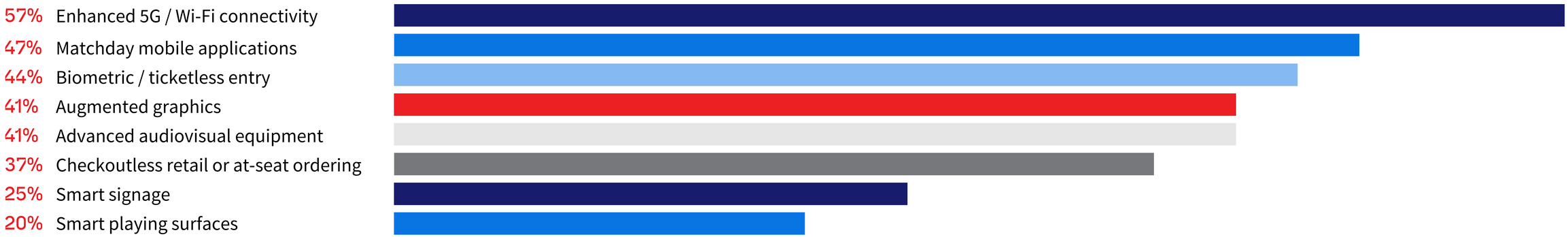
5G networks are also enabling a new wave of in-stadium services. During the Women's Six Nations, Vodafone trialed an app at Cardiff's Principality Stadium that used augmented reality (AR) and 5G technologies to distribute real-time player stats and animations of key events to their phones.

**In the future, 5G networks will enable high-quality video streaming from multiple camera angles, live data feeds, immersive 3D stadium mapping, real-time queue navigation, and more efficient at-seat ordering.**

But more than that, 5G is making sport more accessible. Premier League club Crystal Palace are the first team in English soccer to offer a vision enhancement system for fans with sight loss. The GiveVision headset, powered by a private 5G network, streams live match footage directly to fans in real time.

This cutting-edge system delivers an immersive, sharp stereoscopic feed to the working part of the user's retina, enhancing remaining vision and enabling them to follow the game in unprecedented detail.

## Which technologies have the most potential to transform the at-venue experience?



# 02

## Venues are engaging in an audiovisual arms race

Modern venues are investing significantly in video screens that are increasingly larger in size and more capable in feature set, entertaining fans and offering more opportunities to activate partnerships.

Real Madrid's Bernabeu Stadium and the Los Angeles Clipper's Intuit Dome both boast 360-degree video halo displays that show on-field action and live stats, as well as interactive games and other forms of content to keep fans engaged.

Clippers fans can view shot chart analytics and player speeds during a game, while real-time social media posts captured live are also displayed on screen. Meanwhile the NFL's Los Angeles Rams are using AR to transform SoFi Stadium's video screen into an animated background for sponsors to deploy innovative advertising formats.

Such innovation is not limited to the stadium roof as LED-powered smart playing surfaces are also able to offer similar functionality. Basketball governing body Fiba is using ASB GlassFloor technology to display live player data, for example, with sponsors able to activate during key moments.




ASB GlassFloor's LED sports flooring creates visual effects and dynamic sponsor activations

# 03

## Tech is finally addressing stadium pain points

Venues know they need to make the process of entering the stadium, navigating the stands, and buying food and drink as easy as possible if they are to encourage repeat visits and maximise incremental revenues.

Biometric technology, such as facial recognition, has been deployed at several MLB ballparks, including the New York Mets' CitiField, to identify ticketholders and speed up entry.

Many venues now offer 'checkout-less' retail outlets where computer vision and sensors detect which items have been selected and automatically charge fans. Amazon's 'Just Walk Out' technology is present at many arenas around the world, including the Seattle Seahawks' Lumen Field and Belfast Giants' SSE Arena.

Meanwhile, the Tottenham Hotspur Stadium offers a smart signage system that helps fans find their seat, the most convenient bathroom, or the nearest catering facility.

Misapplied Sciences is going one step further by personalising this information. Its pixel technology simultaneously projects millions of light rays of different colours and brightness and uses software to direct each feed to a specific person. The solution powers a giant video wall at the Intuit Dome, capable of displaying personalised information and content to up to 100 people.

All of these measures reduce queues and ensure fans spend more time enjoying the event.



Amazon's 'Just Walk Out' technology has been rolled out across numerous major league venues

# IN FOCUS

## How Intuit Dome is using tech to maximise home advantage

When the Los Angeles Clippers began building the Intuit Dome, they saw digital innovation as key to creating a high-quality experience that would maximise both revenue and home court advantage.

“We want home court advantage every single game and that means fans turning up early, wearing gear, cheering for the team,” says George Hanna, chief technology and digital officer of the Clippers and Intuit Dome. “There’s a lot of reasons you just stay at home and watch a game. Our North star vision was to get fans in their seats, cheering for the team.”

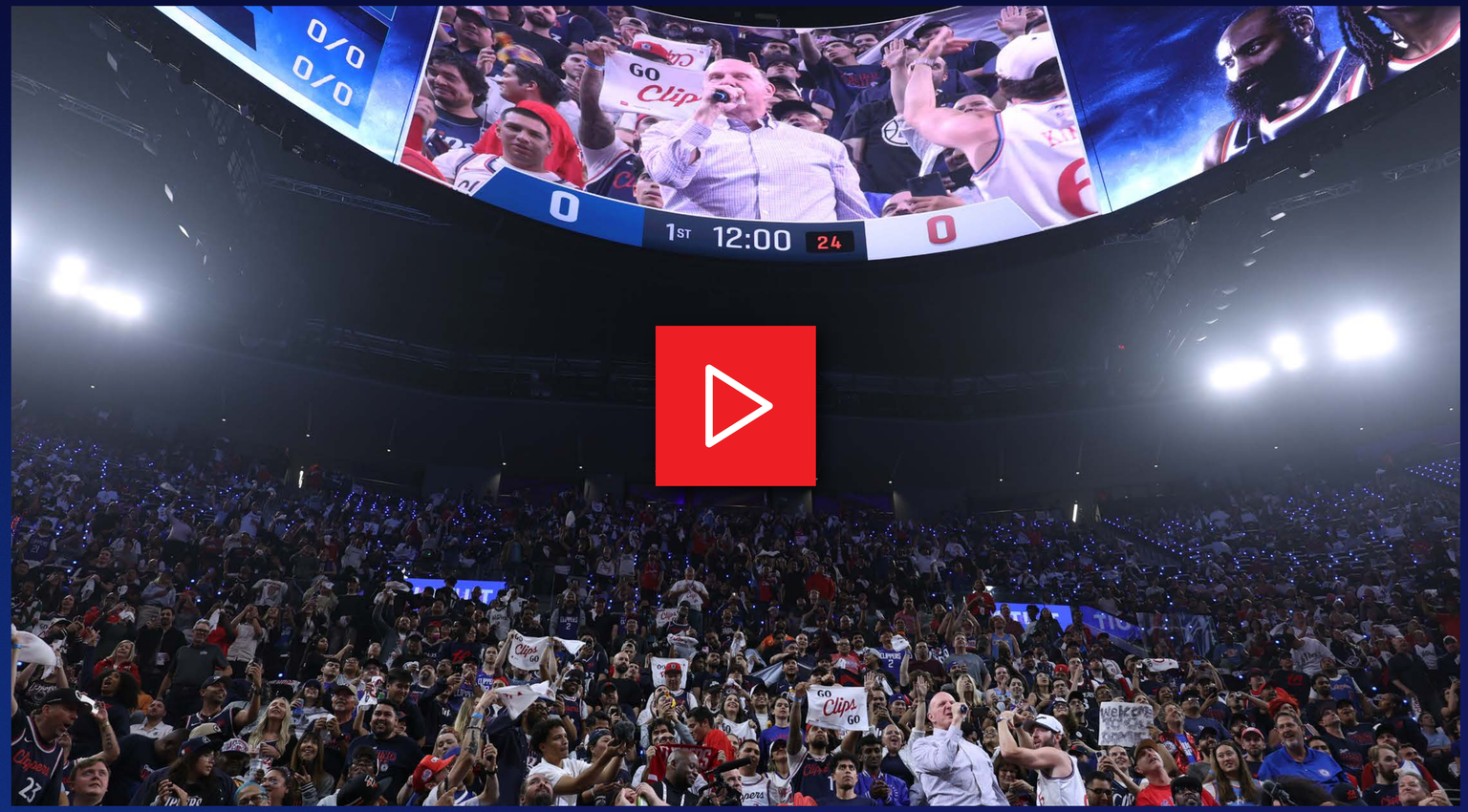
To achieve this, the Clippers implemented the facial recognition-based ‘Game Face ID’ - an opt-in system that allows fans to enter the arena and make purchases, while the team gets valuable first-party data that can be used across the organisation.



**Each seat also comes with a four-button controller that gives fans the option to play games on the Halo digital screen during breaks in play. The Halo screen provides near real-time statistics and analytics designed to inform supporters.**

There are devices that additionally measure audio levels and can determine the loudest fan, who is then rewarded for their efforts. Personalised signage around the arena also helps visitors find their way to their seats easily.

“We do a lot of amazing things in our building but this in the name of home court advantage – not in the name of showing off cool technology,” adds Hanna. “We want to reward fan behaviour, for showing up early, wearing our gear and sitting in your seat, cheering on the team.”




Daktronics engineered the first-ever double-sided halo in an arena setting for the LA Clippers’ Intuit Dome




# 04

## Digital twins are transforming event organisation

OnePlan digital twins have been used at events including Paris 2024 and The Open golf tournament

AI-powered digital twins are revolutionising event planning by providing venue operators with a highly accurate data-driven replica of a physical stadium.

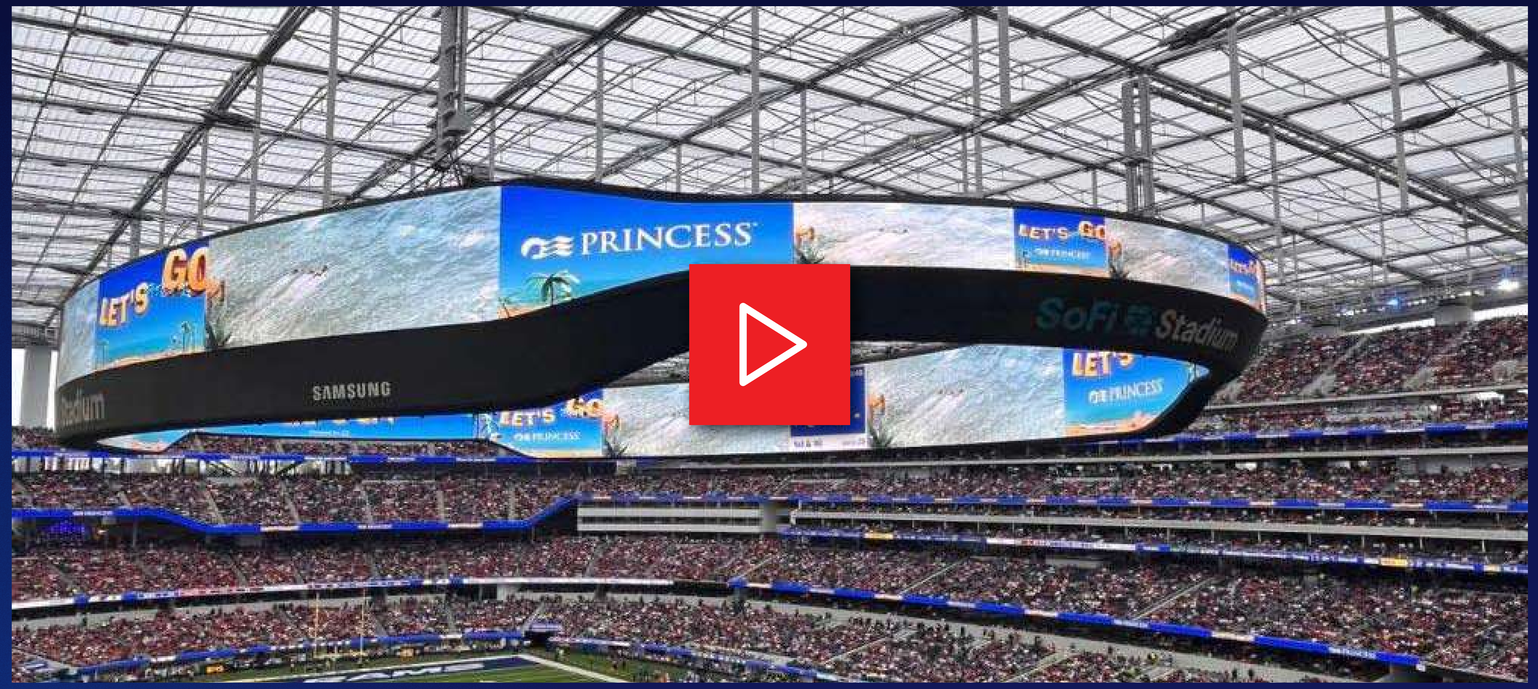
Some of these digital twins are merely dashboards displaying data about energy use, how many fans have come through the turnstiles, or how much money has been spent on food and drink. Others are highly visual, data-driven 3D recreations of stadiums and the surrounding areas.

Digital twins can be used to simulate fan behaviour, what a venue will look like at certain times of day, and what any alteration to a workflow could have in the real world. This makes it easier to plan major events without making on-site visits or fine tune processes before a stadium has been built. Examples include traffic management, security and camera positioning.

The Paris 2024 Olympic Games worked with OnePlan to create digital versions of every single competition venue – crucial given the complexity of the operation and the fact that organisers only gained access to many sites just weeks before the opening ceremony.

Meanwhile, the R&A has created digital twins of every Open Championship golf course since 2022. These replicas allow it to run through possible changes to the site and to overlay real-time ball and flight data, a move which also enables the creation of more engaging digital products.

SoFi Stadium's videoboard, dubbed The Infinity Screen by Samsung, is the focal point of the state-of-the-art venue




# IN FOCUS

## The plan to futureproof SoFi Stadium for four decades

Before SoFi Stadium opened its doors in 2020, major event organisers did not consider Los Angeles a viable host city because of the absence of a suitable venue. For the NFL's Los Angeles Rams, it was important that their new home was technologically advanced enough to ensure it could support Super Bowls and Wrestlemanias for decades to come.

"SoFi Stadium and the Intuit Dome were built very deliberately to change the status quo and how we think about stadiums, the entertainment experience," explains Skarpi Hedinsson, the Rams' former chief technology officer. "When we started, one of the things we were confronted with was how to make a stadium futureproof from a technology perspective given the building needs to stand for up to 40 years."

The venue's team had set its initial focus on ensuring strong connectivity, working with Verizon to establish a robust network infrastructure for all other applications to run smoothly. The developers also used technology to deliver a frictionless experience for fans when entering the stadium or making payments and operators also have access to a digital twin to aid venue operations.

"A lot of the key learnings are about modernisation," adds Hedinsson. "It's about making things efficient, cost efficient, but also design efficient, so that you can maintain things in a much easier way, and that you can expand and really create what I would call 'stadium as a platform' that allows you to plug in technologies."

# 05

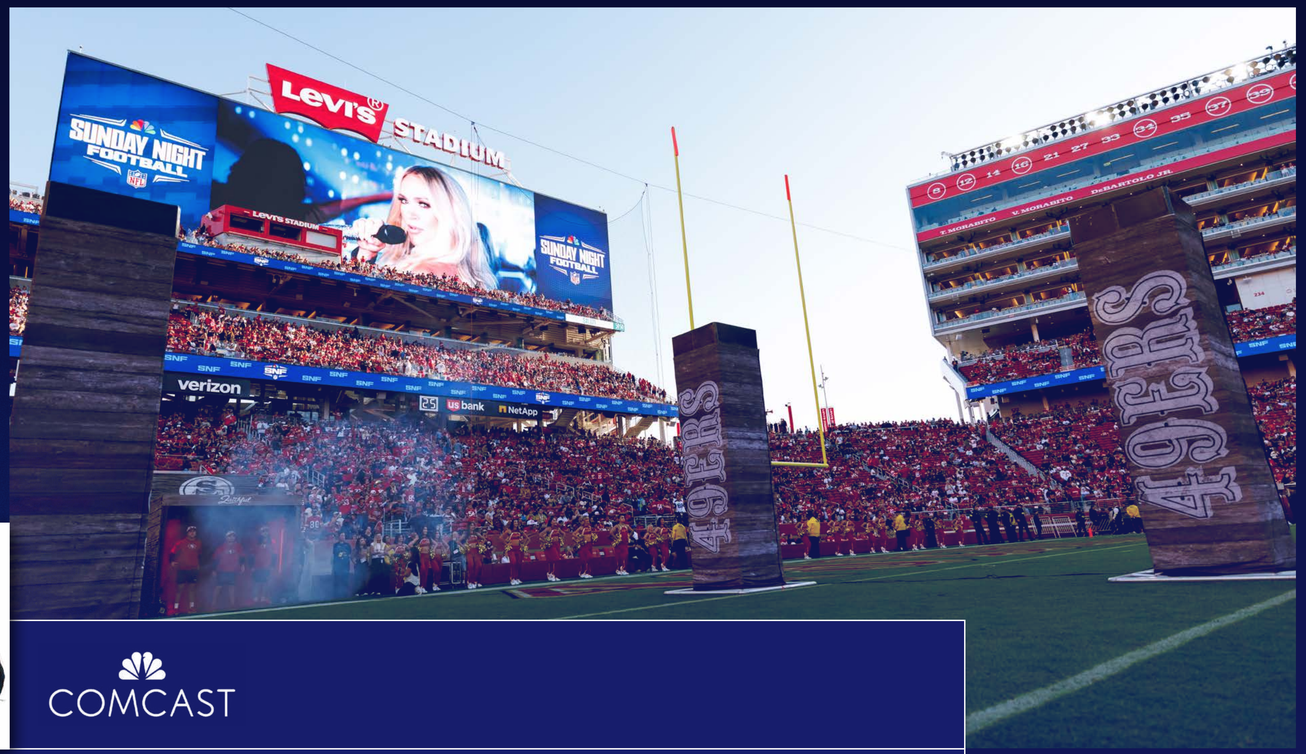
## Smart stadiums are filling fan data gaps

Smarter stadiums have given teams and venue operators more touch points to gather data and learn more about their fans. When combined with information gathered from ticketing, merchandise and digital platforms, more technologically advanced venues are helping to bridge the gap between the physical and digital worlds.

Real time behavioural data gathered from networks, concession sales and other stadium services can help optimise the experience. This information can also be used to create targeted offers that can even be issued as push notifications via a stadium application – allowing it to be redeemed while they are still in the stadium and maximising matchday revenues.

Everton worked closely with HPE Aruba to ensure the networking infrastructure at their new Hill Dickinson Stadium was capable of actively capturing more first-party data, while across the Atlantic the San Francisco 49ers work with NetApp on operating a silo-free data infrastructure to support operations at Levi's Stadium.

In the future, the stadium will effectively be a small-scale smart city, capable of capturing data and adapting to every situation.






COMCAST

**Jenna Kurath**, VP, Sports Venture Partnerships & SportsTech Business Development

**"If it's not smart, sustainable, and connected – it won't make the shortlist for the next big event. The arena of the future isn't a building. It's an operating system. From biometric entry to energy-aware systems and dynamic crowd flows, tomorrow's stadiums won't just host fans – they'll know them."**

# Ones to watch

## 15 Seconds of Fame

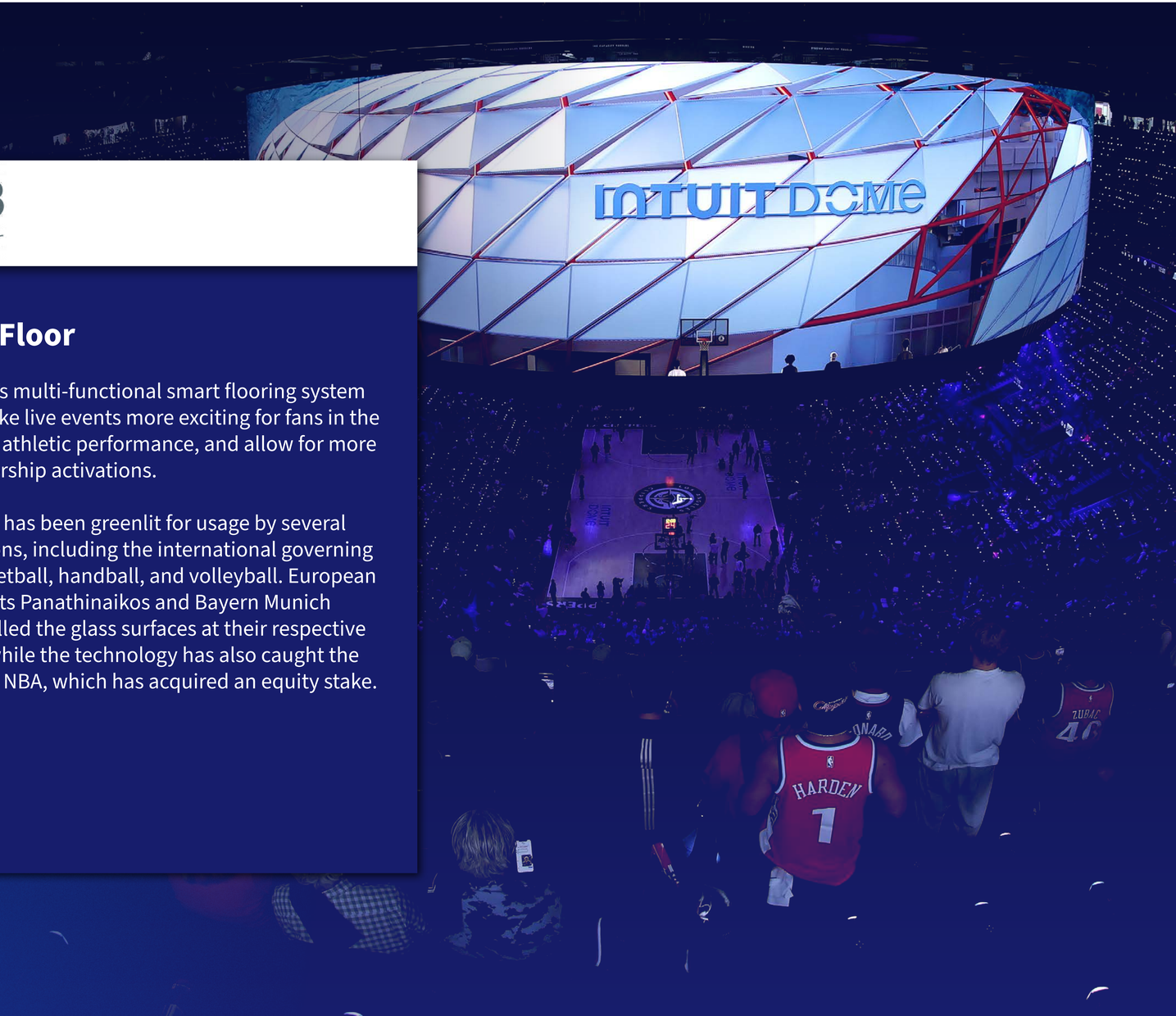
15 Seconds of Fame (15SOF) uses facial recognition technology to assemble clips from broadcast or in-arena video feeds, which can then be downloaded through partner applications. It gives spectators the opportunity to share clips of themselves in the crowd on social media, which drives greater awareness and deepening engagement. It can also drive advertising revenue that 15SOF can share with its partners.

The company has previously collaborated with the NFL and tennis' Australian Open, while the NBA and MLB are among its investors.

## ASB GlassFloor

ASB GlassFloor's multi-functional smart flooring system promises to make live events more exciting for fans in the arena, enhance athletic performance, and allow for more creative sponsorship activations.

The technology has been greenlit for usage by several global federations, including the international governing bodies for basketball, handball, and volleyball. European basketball outfits Panathinaikos and Bayern Munich have both installed the glass surfaces at their respective home arenas, while the technology has also caught the attention of the NBA, which has acquired an equity stake.



# 06

# Athletic performance



# AI makes sport smarter, safer and more efficient at all levels




Elite sport is a revenue-generating machine, captivating the imaginations of billions of people around the world every day. But sport is nothing without its athletes, whether they're competing for an Olympic gold medal or just playing for the love of the game.

Scientific research, medical advances, and data analytics have pushed athletes to new heights, made sport more exciting to watch, and enhanced welfare, while also enabling more sophisticated tactics and recruitment strategies.

Now, athletic performance and grassroots sport is ready to undergo a new revolution, one powered by even more sophisticated data gathering, AI, and wider accessibility to powerful technologies that were once the preserve of only those with financial resources and expertise to harness them.

## Which of these technologies will have the most significant impact on the field of play in the next five years?



# Key trends

01

## New data is pushing the boundaries of athletic performance

New technologies are helping to uncover a greater volume, velocity and variety of data that can be used to optimise training schedules, nutrition plans, and fitness regimes to enhance performance and player wellbeing. Skeletal tracking systems are expanding beyond traditional forms of data capture, such as GPS trackers and heart rate monitors, to track every limb on an athlete up to 60 times per second. This provides unprecedented real-time insight into movement, reaction times, and fitness levels.

This data is complemented by biometric sensors, microchipped equipment, and sports-specific devices to create a complete data profile of what's happening on the pitch and into the well being of athletes – often in real time.



Advances in performance tech are leading to enhanced coaching methods and better outcomes




Smart fabrics will soon be able to capture previously uncapturable data as they bend, stretch, and twist. In-shoe sensors will unlock new biomechanical data by measuring load and asymmetries in the lower body, reducing injury risk. And sports-specific devices will yield granular levels of insight into particular disciplines. For example, Playermaker's soccer boot-based peripheral can track touches, speed, and kicking power.

Cloud storage ensures all data is stored in a single repository rather than siloed away in multiple locations. This ensures any application can access and make sense of it, including AI algorithms and analytical software.

Teams, league and federations, conscious that their playing staff are their most important asset, now benefit from unified athlete data profiles and biometric passports that provide a complete overview of an individual and their baseline performance.

Coaches can recommend changes to technique, adjust workloads, predict injuries before they happen, and even extend careers. Modern, intuitive applications make it easier for coaches and fitness teams to relay information to athletes in a more understandable visual format – even on the side of the pitch on tablet.

But perhaps the most visually impressive way to do this is through VR applications, such as Rezzil's soccer training platform, that allow players to perform training drills or relive certain match situations.

Another trend is the advent of technologies specifically designed to address gender inequalities in sport given the extent to which sports science research to date has focused on men. Companies like fitness and nutrition specialist Orreco and boot manufacturer Ida Sports are but two examples.



COMCAST

**Jenna Kurath**, VP, Sports Venture Partnerships & SportsTech Business Development

**"Today's performance innovation is about more than gains – it's about availability, career longevity, and impact. AI will help athletes prevent injury, sharpen focus, extend careers, and elevate their performance - one data point at a time. Healthy, consistent athletes drive the highlight reels, the ratings, and the return on investment. The healthier the athlete, the higher the ratings."**

# 02

## Democratisation of performance tech is narrowing the innovation gap

Access to sophisticated on-field technology is no longer restricted to elite sports organisations with greater resources. Advances in consumer electronics, advanced mobile connectivity, and cloud computing mean such technology is within easy reach of any team or athlete.

**Modern smartphones, equipped with powerful processors, advanced cameras and 5G modems, can collect data, make biometric assessments, and be used to analyse information, both on-device and on the cloud.**





sportradar

**Nicolo D'Ercole**, EVP, AI & Technology, Sportradar

**"AI is still a tool enhancing what humans do. It will never decide how you're going to score a goal or stop someone making a mistake – that's the beauty of sport. Even if you can predict statistically how things might go, you never know what the reality of it is going to be."**




The gamified world of Zwift has fostered a new virtual cycling community

Catapult, for example, now has a consumer version of its soccer tracking device, Carv is a wearable ski coach, and Hammerhead creates cycling computers. Meanwhile, services such as Peloton, Strava and Zwift offer analytical, community and gamification elements.

Apps are also unlocking opportunities, allowing athletes to be scouted or coached wherever they are in the world. AI scouting apps such as AIScout allow recreational soccer players to record themselves performing training drills and analysis tools such Sportsbox AI assess golf swings to identify improvements to an individual's technique.

The emergence of AI-powered, relatively low-cost cameras from the likes of Veo, Spiideo and Pixellot means even the smallest of teams can create professional grade video footage that can be used for conventional post-match analysis or fed into AI or analytical platforms. They can also be used to live stream matches, too.

# 03

## AI has assumed coaching and scouting duties

The difference between winning and losing can be microscopic. So it should come as no surprise that tech has infiltrated the field of play as teams and athletes seek anything that can give them even fractional gains in performance.

Liverpool and Google's DeepMind have worked together on an AI system that advises coaches on corner kick strategy. 'TacticAI' uses both predictive and generative AI techniques to assess who is most likely to receive the ball and the likelihood of a shot attempt, analyse the historic performance of similar tactics, and what adjustments can be made to increase the likelihood of success.

When evaluating TacticAI, experts at Liverpool preferred the system's suggestions over tactical setups that had been deployed in real life on nine in every ten occasions.

Talent identification is another area of focus. Major League Soccer (MLS) has teamed up with Ai.io to work on scouting tech that the competition hopes will "identify and reach every kid playing soccer in North America", while Intel is working with the International Olympic Committee (IOC) to help match young athletes with the most appropriate Olympic discipline for their talents.



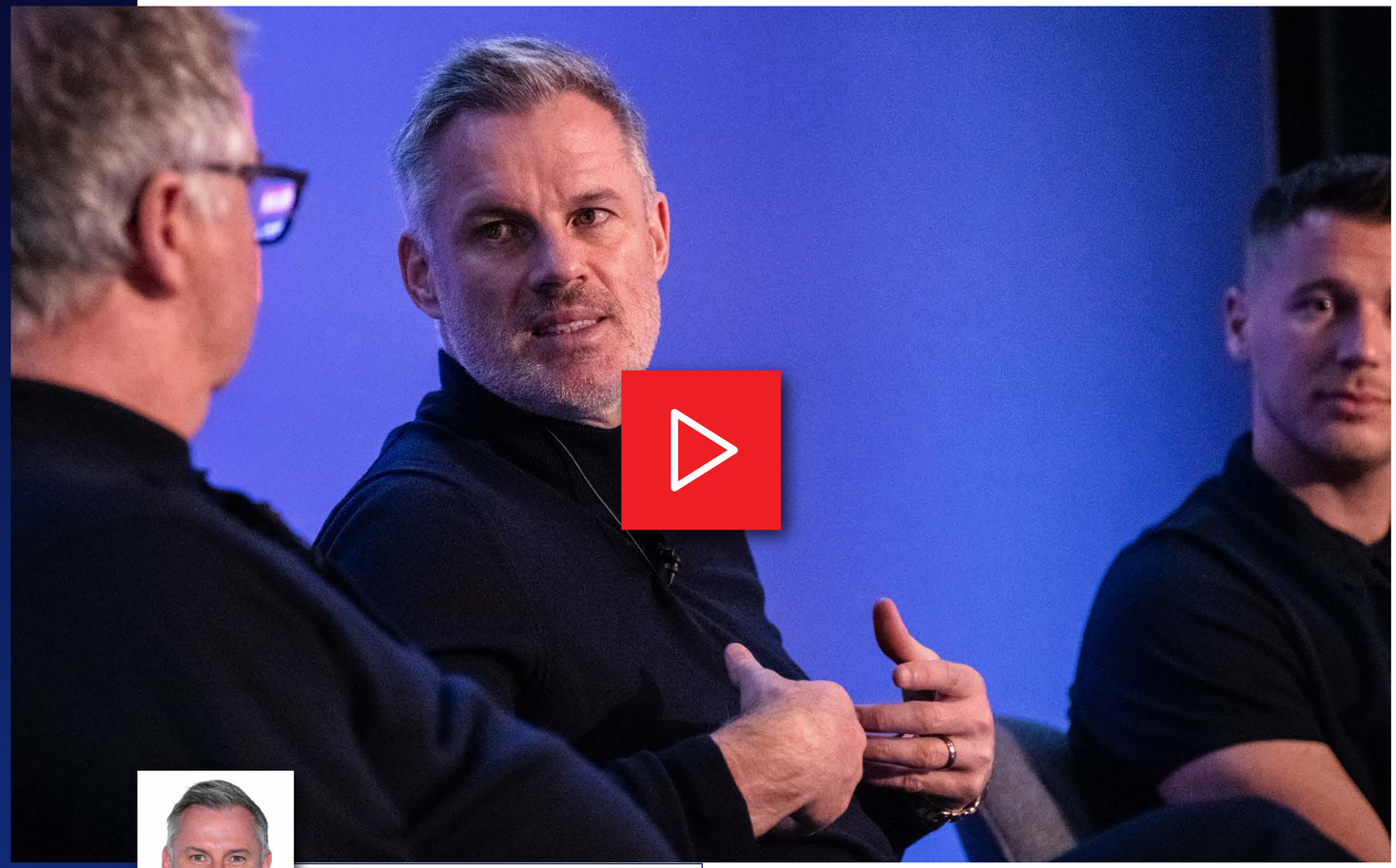

Google's TacticAI has been deployed by Liverpool coaching staff to aid tactical decision-making

**Soccer recruitment has become increasingly data-driven over the past two decades, with teams looking to unearth gems and mitigate the risk of paying huge sums for players who don't fit into their system.**

Dedicated scouting platforms are widely used across the sport and Spanish club Sevilla even brought in IBM to integrate Gen AI into their player recruitment processes.

Inevitably this raises concerns about losing the human element of sport. Sportradar, which is working on foundational models designed to analyse sport to the point that it can come up with new tactics or answer questions about the best way to respond to a certain formation, is adamant that AI will never be able to replace the emotional intelligence required to coach.

The human element is also crucial when it comes to identifying and guiding the next generation of superstars. Sportradar's Synergy Sports Platform, which provides coaches and scouts with the ability to evaluate players with advanced insights and analytics across basketball, baseball and softball, is powered by a combination of 1,000 human data collectors and 250 automated cameras which track more than 100,000 professional, college and high school games a year.





**Jamie Carragher**, Former Liverpool and England soccer player

Liverpool legend Jamie Carragher discusses advancements in data during November's Sportradar Connect: Soccer Edition event

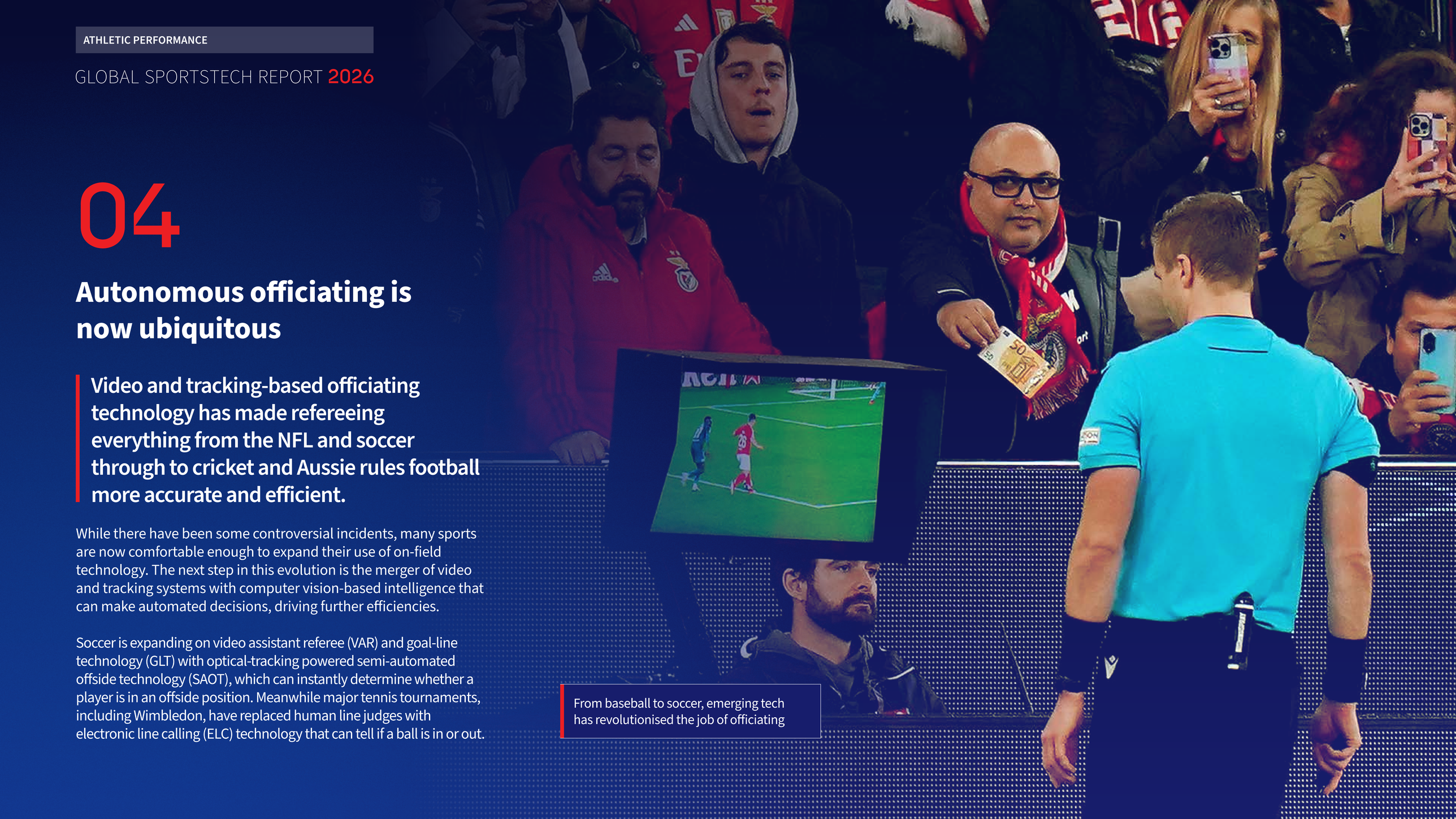
# 04

## Autonomous officiating is now ubiquitous

**Video and tracking-based officiating technology has made refereeing everything from the NFL and soccer through to cricket and Aussie rules football more accurate and efficient.**

While there have been some controversial incidents, many sports are now comfortable enough to expand their use of on-field technology. The next step in this evolution is the merger of video and tracking systems with computer vision-based intelligence that can make automated decisions, driving further efficiencies.

Soccer is expanding on video assistant referee (VAR) and goal-line technology (GLT) with optical-tracking powered semi-automated offside technology (SAOT), which can instantly determine whether a player is in an offside position. Meanwhile major tennis tournaments, including Wimbledon, have replaced human line judges with electronic line calling (ELC) technology that can tell if a ball is in or out.



From baseball to soccer, emerging tech has revolutionised the job of officiating

The NFL is using Sony's Hawk-Eye optical tracking tech to capture images on the field to determine where the ball needs to be placed with greater speed and accuracy before a first down. During testing, the average line-to-gain measurement took 30 seconds compared to 75 seconds with the chain gang. Human officials will still place the ball at the end of plays where a first down isn't being determined.

Elsewhere MLB's Automated Ball-Strike System – or 'Robo ump' - uses in-stadium cameras to track every pitch and determine whether it was a fair delivery based on each hitter's strike zone. With optical tracking in place, any player on the field can challenge a call within two seconds by tapping their helmet. MLB estimates the automated system can return a decision within 17 seconds.

While automated systems have been proven to be accurate and rapid, the most obvious obstacle to their ongoing use is trust. Human error can be mitigated but never removed, as evidenced by the ELC system at Wimbledon accidentally being switched off last summer.

As for AI refereeing a whole event autonomously? We may be some way off.



Wimbledon has replaced human line judges with electronic line calling



SONY

**Rufus Hack**, Chief Executive, Sony Sports

**"It's hopefully unequivocal now that technology can be good for sport. Technology has the power to make sport fairer, quicker and safer. But obviously it needs to be done the right way, and it needs to be sympathetic to the sport itself."**



# 05

# Tech is professionalising youth and grassroots sport

Youth sports in the US is now a US$40 billion industry supported by a sports app market worth an estimated US$12 billion. Startups are seeking to serve a booming market with digital infrastructure and services that track data, live stream matches, manage websites, communicate with parents, administer leagues, and identify commercial opportunities. Others are seeking to become all-in-one platforms.

**TeamSnap is used by more than 30 million parents, players and coaches at more than 19,000 sports organisations, and claims to have assisted with US$19 million in sponsorship revenue.**

Beyond youth sports, startups are working on matchmaking platforms for racquet sports, pitch and court booking applications and enterprise business platforms for gyms, while governing bodies are partnering with big tech companies to enhance community sport. For example, England's Football Association has teamed up with PayPal to make it easier for clubs to collect fees from players.

# Ones to watch



## Springbok Analytics

Springbok Analytics is developing AI technology that transforms 2D MRI scans into a 3D digital twin of a muscle. Scans take less than 15 minutes and unlock new injury assessment and prevention possibilities by providing medical teams with a new way to view and quantify muscle volume, asymmetries and atrophy, as well as soft tissue injuries and scar tissue.

Founded in Charlottesville, Virginia by University of Virginia engineers, Springbok Analytics has league-wide partnerships with the NBA, which is now an investor, and the NFL, assisting the American football league with research into hamstring injuries.

## Nextiles

Nextiles is creating smart fabrics that could generate entirely new sources of data, such as force, motion and micromovements, for performance analytics and fan engagement applications. The technology meshes flexible electronics with sewing technology to create ‘smart threads’ that can be added to any fabric and transmit data using Bluetooth.

Backers include the US Air Force, Drive by DraftKings, MSG Sports, the NBA, and the National Science Foundation.

## Plantiga

Plantiga’s solution to sport’s seemingly insatiable appetite for athlete data is AI-powered in-shoe sensors, which collect insights on everything from ground forces and contact times to stride length and asymmetries, allowing users to make more informed decisions around player recovery and injury prevention.

The company’s tech is used by teams across the big four US major leagues and by major college sports programmes.