

MARCH 2026

GLOBAL SPORTSTECH ECOSYSTEM REPORT 2026

PRESENTED BY



SPORTSTECHX

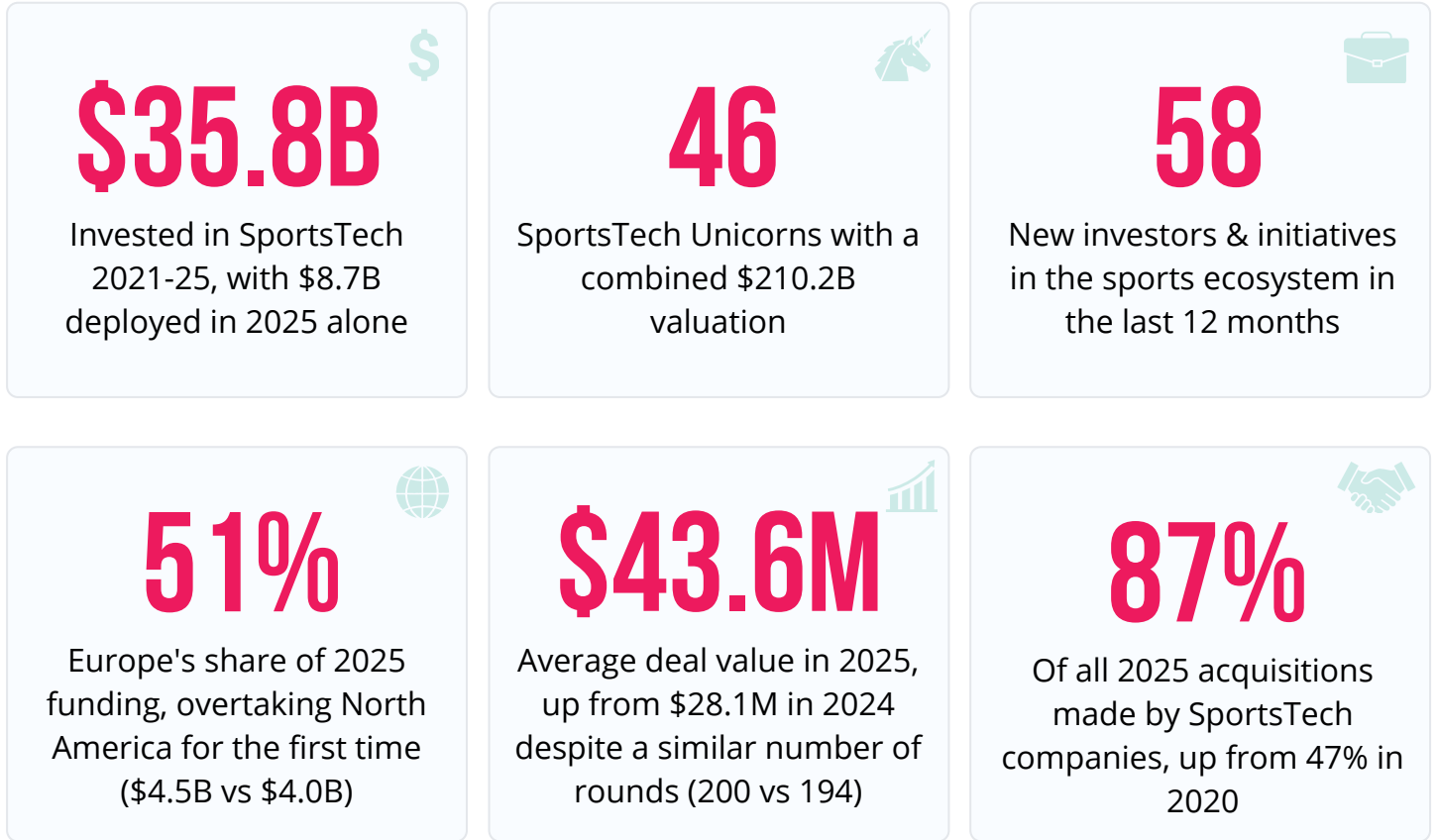
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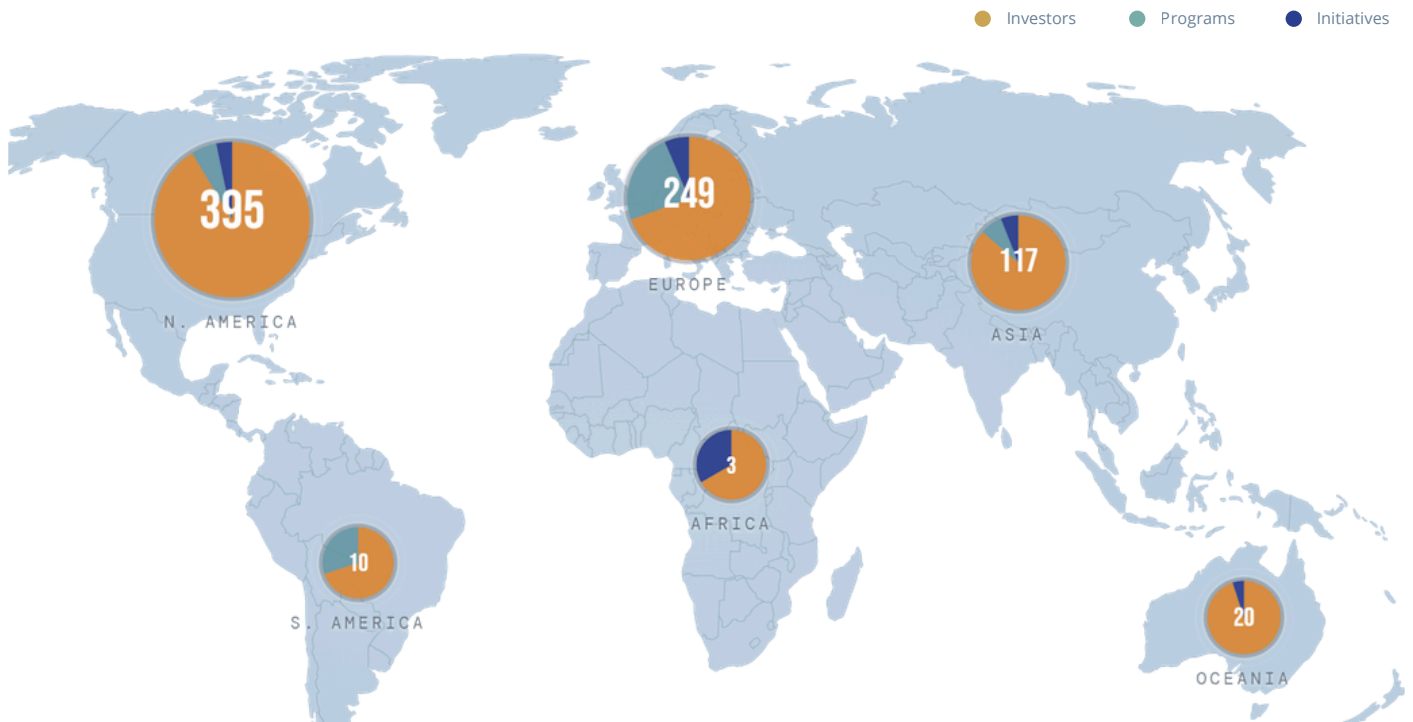
PEAK

EXECUTIVE SUMMARY

THE NUMBERS THAT STAND OUT



GLOBAL SPORTSTECH ECOSYSTEM MAP



TRENDS | DEEP DIVES

THE FORCES RESHAPING SPORTSTECH

TRENDS

Three signals that point to structural shifts, not temporary blips.



SPORTSTECH IS BUYING ITSELF

SportsTech companies are now their own most active acquirers — sportstech-on-sportstech dealstripled from 21 in 2016 to 68 in 2025.

Over the past decade, sportstech-on-sportstech acquisitions have tripled, rising from 21 deals in 2016 to 68 in 2025. The industry is consolidating from within. Companies like Teamworks, Hudl, and Sportradar are assembling platform stacks through acquisition, buying adjacent capabilities rather than building them.

The goal is the same: become the single vendor a club or league can't live without.



COMPETITIVE RUNNING IS HAVING ITS MOMENT

02

Record nishers, record revenues, and a new breed of runner turning race weekends into destination experiences — competitive running has become one of the fastest-growing segments in global sports.

Competitive running is shifting from a niche endurance sport into a global, event-driven participation economy. Record-breaking marathon participation is no longer an outlier, it's the new baseline. The 2025 TCS New York City Marathon reached 59,226 finishers, while London matched that scale with 56,000. This growth is not episodic — it is structural.

The clearest signal: only 129 of the 4,209 races with over 500 participants failed to return in 2025 — a churn rate of 3.1%, down from 3.9% in 2024 and 5.0% in 2023, and a record low. The market isn't just expanding — it is stabilizing, professionalizing, and consolidating.



SPORT IS GOING DIRECT

03

A structural collapse in the US and a strategic awakening internationally have combined to make 2025/26 the year the DTC shift stopped being theoretical.

The question of whether leagues and teams would go direct-to-consumer was treated as a thought experiment for years. Infrastructure wasn't ready, rights structures were too complex, broadcasters were paying too well.

Not anymore.

READ THE FULL ANALYSIS IN THE LIVE REPORT

Each insight includes deep-dive analysis, timelines, data tables, and expert commentary - available in the interactive report.

TRENDS | DEEP DIVES

THE FORCES RESHAPING SPORTSTECH

DEEP- DIVES

Three signals that point to structural shifts, not temporary blips.



HOW PE GOT INTO SPORT

01

The two-decade story of how private equity broke into professional sport and what gets lost when the floodgates open.

Private equity didn't change sports — access did. Once leagues opened ownership (fully by 2024), capital flooded in, validating sports as an asset class and driving record valuations. Firms like Arctos, RedBird, and CVC now define the playbook.

The tension is structural: financial returns vs long-term fan identity — and it's starting to show



THE NBA COMES TO EUROPE

02

A 16-team league launching October 2027 — the most structurally ambitious expansion in the NBA's history.

The NBA isn't expanding to Europe casually — this is a full league launch. A 16-team competition is set for 2027, backed by strong demand (European talent already dominates MVP races) and a clear gap: elite players exist, but commercial infrastructure doesn't. The opportunity is significant. Franchise fees are expected at \$500M–\$1B, with major cities targeted and investors already lined up. At the same time, it puts direct pressure on the EuroLeague and forces a rebuild of arenas, media rights, and the broader ecosystem.

Because it's being built from scratch, the real opening is operational — everything from ticketing to data and fan platforms still needs to be created.



WHO HOLDS THE POWER

03

How three payment models — franchise, tour, promoter — determine who holds power, who carries risk, and who gets rich in sport.

The way athletes get paid determines who has power, who carries risk, and who actually gets rich.

The structure was never neutral. It was built by the people who already had power. Now, for the first time, athletes have enough capital, enough data, and enough alternatives to build something of their own.

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INNOVATORS

DRIVING WHAT COMES NEXT

The people and organisations defining where sports innovation and investment go from here.

● North America ● Europe ● Asia Pacific



Alexander Janssen
CEO,
Dutch Sport Tech
Fund



Anatoly Evdokimov
Investment Director,
Match Ventures



Carolina Chiappero
Head of Innovation,
Juventus Football
Club



Chad Wilton
Co-founder & CEO,
PEAK Conference



Dilip Kumar
Head- Health
investments,
Rainmatter



Dr. Hendrik Weber
SVP Sports Technology
& Innovation,
DFL // Bundesliga



Jeffrey Hintz
Innovator,
Sports Tech HQ



**Juan Fuentes
Fernández**
Director GSIC Testing
Lab Valencia,
GSIC



Koen Bosma
Partner,
APEX



Lloyd Danzig
Managing Partner,
Sharp Alpha



Mike Kurt
Head of Strategic
Innovation
Partnerships,
Swiss Olympic



Rebecca Hopkins
CEO,
The STA Group

READ THEIR INSIGHTS IN THE FULL REPORT

In-depth Q&A with each expert - covering disruption, investment, and the future of sport - available in the interactive report.

THE GLOBAL STAGE FOR SPORTSTECH STARTUPS

PEAK 2026 | LAS VEGAS



PEAK AT A GLANCE: 1,000+ ATTENDEES | 100+ SPEAKERS | 8+ TRACKS | 50+ COUNTRIES | 100+ EXHIBITORS



[PLAY VIDEO](#)

PEAK brings together 1,000+ sports executives, investors, and founders shaping the future of sport.

Raise capital, build partnerships, and stay ahead of SportsTech - all in one place.

Three days at PEAK can replace months of meetings, so you can get back to building.

APRIL 20-22, 2026 | Fontainebleau Las Vegas

TRACKS



SHAPING THE FAN EXPERIENCE



MAXIMIZING SMART VENUE PERFORMANCE



ADVANCING ATHLETE PERFORMANCE



AI-POWERED FRONT OFFICES



PATHWAYS TO PRO



FINANCING THE FUTURE OF SPORT



INNOVATIVE EMERGING LEAGUES



NEXT-GEN REVENUE STRATEGIES

STARTUP COMPETITIONS

STARTUP WORLD CUP FINALS - POWERED BY AWS

Catch live pitches at PEAK as the nine finalists pitch to leading sports executives, investors and industry leaders in a bid to compete for a \$10,000 prize and other startup perks.

Finalists:

FOR ATHLETES



FOR FANS



FOR EXECUTIVES



GROUNDBREAKERS CHALLENGE - POWERED BY GSIC

The global SportsTech innovation challenge connects innovative startups with leading sports organizations who are seeking tech-driven solutions, with the opportunity to win a pilot partnership.

Participating organizations with problem statements:



DISCOVER THE FUTURE OF SPORTS
JOIN THE GLOBAL SPORTSTECH COMMUNITY AT PEAK 2026

SAVE \$500 NOW

PEAKCONF.COM/STXREPORT












STARTUPS TO WATCH

COMPANIES WORTH YOUR ATTENTION











PEAK STARTUP WORLD CUP FINALISTS

Finalists in the PEAK Startup World Cup: pitching in LasVegas on April 21 in front of investors and industry leaders.

 <p>KinetikIQ 🇮🇪 Galway</p>	 <p>Staxy 🇬🇧 London</p>	 <p>Scoutz 🇺🇸 New York City</p>	 <p>RivalX 🇺🇸 New York City</p>	 <p>Catch 🇺🇸 Skokie</p>
 <p>Spoda AI 🇮🇳 Bangalore</p>	 <p>Theo Health 🇬🇧 Glasgow</p>	 <p>Super QuickQuestion 🇺🇸 New York City</p>	 <p>MVEO 🇫🇷 Paris</p>	











INNOVATORS

Nominated by this year's featured innovators: the startups they're watching, backing, or building alongside.

 <p>Sherpa Sports 🇺🇸 Austin</p>	 <p>Refquest 🇺🇸 Indianapolis</p>	 <p>Dawako 🇪🇸 Paterna</p>	 <p>Courtyard 🇺🇸 California</p>	 <p>StepOut 🇮🇳 Bangalore</p>
 <p>Aiball 🇪🇸 Barcelona</p>	 <p>DHTA Sports 🇮🇹 Turin</p>	 <p>Homefans 🇬🇧 Manchester</p>	 <p>Cyclo Watt 🇮🇪 Gibraltar</p>	 <p>TIVA Performance 🇫🇷 Paris</p>

OUR PICKS

Companies that stood out to our team: for the problem they address, or the moment they're in.

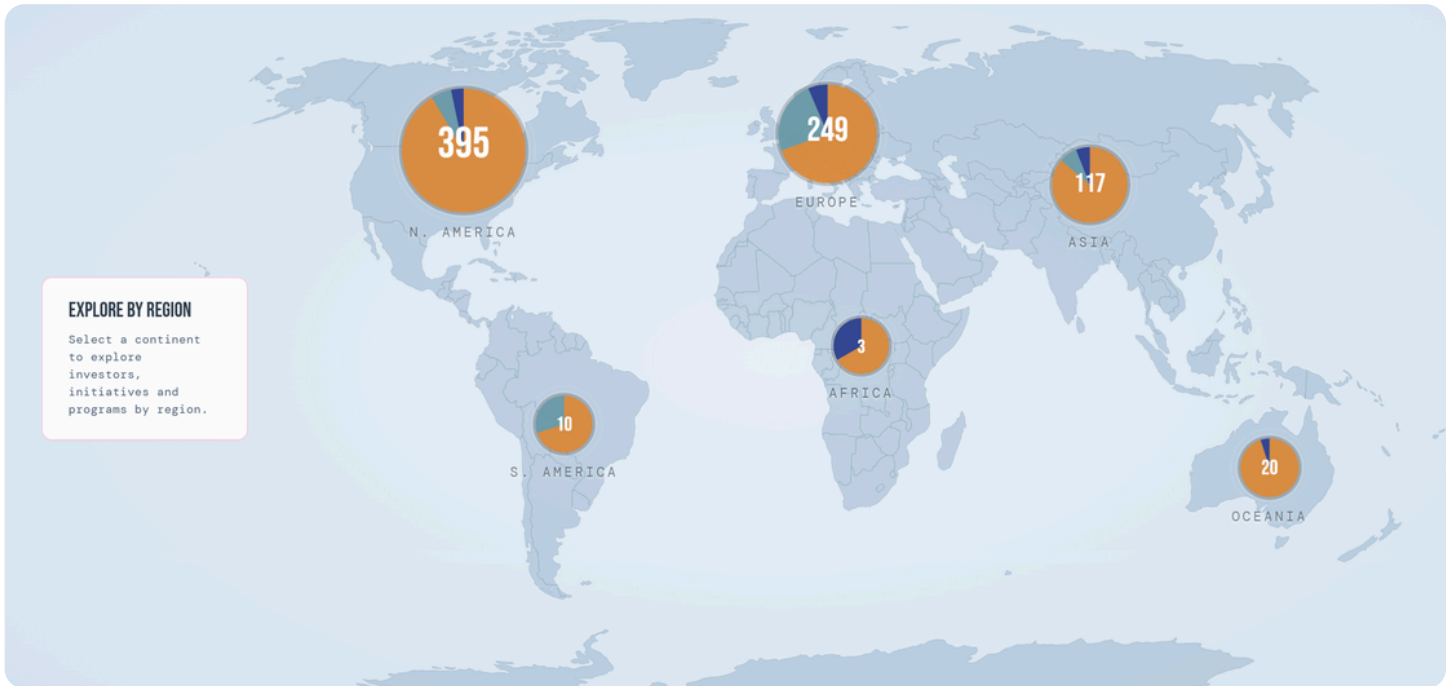
 <p>Ahotu 🇫🇷 Paris</p>	 <p>Gamecode 🇩🇪 Berlin</p>	 <p>Prematch 🇪🇸 Köln</p>	 <p>Athrise 🇮🇳 Lucknow</p>	 <p>Rox t 🇬🇧 London</p>
 <p>Next Fit 🇧🇷 Santa Catarina</p>	 <p>INTVL 🇦🇺 Melbourne</p>	 <p>Audazzio 🇺🇸 San Antonio</p>	 <p>OTTO Sport AI 🇺🇸 Minneapolis</p>	 <p>CricHeroes 🇮🇳 Ahmedabad</p>

ECOSYSTEM

THE GLOBAL ECOSYSTEM MAP

688 investors, 96 initiatives, and 44 programs across every major region.

● Investors ● Programs ● Initiatives



The Global Ecosystem Map provides a visual snapshot of the worldwide sports technology landscape, showing how investors, initiatives, and programs are distributed across different regions. It highlights a strong concentration of activity in North America and Europe, with Asia emerging but still significantly smaller, while regions like Africa and South America have limited representation. The map is designed to let users explore these regional differences, making it clear where the industry is most developed and where there is still room for growth.

EXPLORE THE INTERACTIVE ECOSYSTEM MAP

Select a continent to explore investors, initiatives and programs by region.

[EXPLORE NOW](#)

AUGUST 2025 · RIYADH, SAUDI

NGSC 2025

REGISTER INTEREST



ABOUT THE CONFERENCE

The New Global Sport Conference (NGSC 2025) is the premier global platform for industry leaders at the intersection of gaming, esports and sport — bringing together CEOs, founders and investors to drive groundbreaking initiatives.

A flagship event of the Esports World Cup Foundation, NGSC is held annually in Riyadh during the closing weekend of the Esports World Cup — the world's largest esports and gaming event. NGSC 2025 official theme, "The Next Game," reflects the accelerating convergence of competitive gaming and global sports.



TRANSFORMING THE FUTURE OF COMPETITIVE PLAY

- 01 Bringing together the world's most influential voices.
- 02 Where industries converge to spark dialogue and challenge convention.
- 03 The leading platform where gaming, esports and sport's future takes shape.

THE PROGRAM

The curated program features over 1,500 industry leaders, including HRH Prince Faisal bin Bandar bin Sultan Al Saud, HRH Prince Fahad bin Mansour bin Nasser Al Saud, and representatives from the LA28 Olympic Games, Sony, SEGA, and more. Through keynotes, panels, strategic roundtables and private forums, attendees will define the next stage of industry growth and innovation.

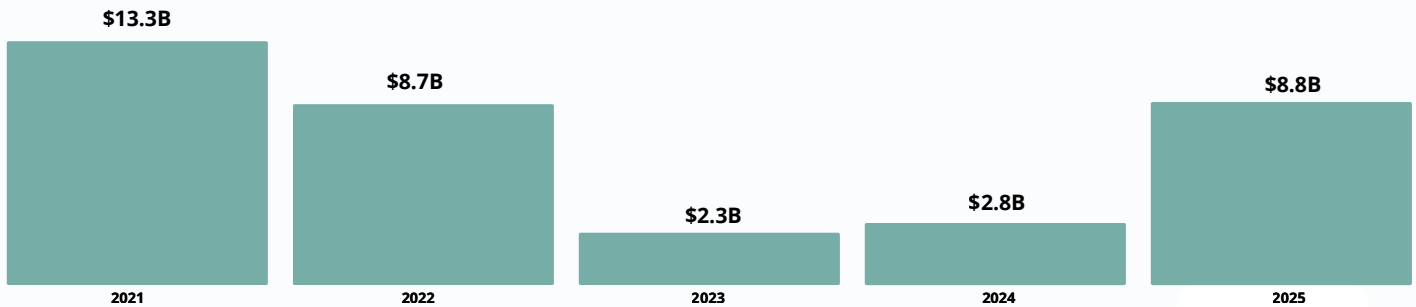
EQUITY

THE NUMBERS THAT MATTER (2021 - 2025)

The complete dataset behind this year's report: every company, every deal, every number behind the story.

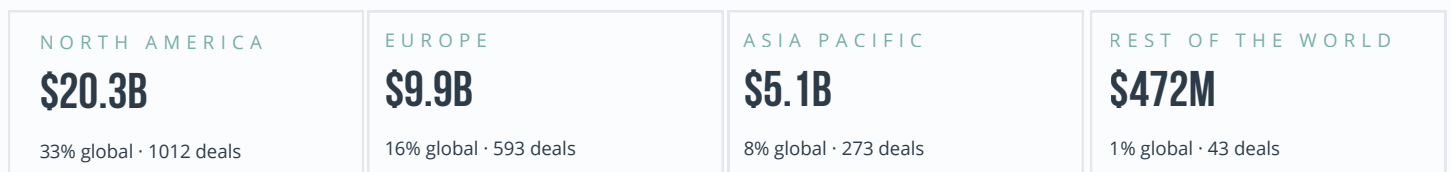
FUNDING BY YEAR

Peaked at \$13.3B in 2021, the all-time high. 2025 marked a decisive return to growth.



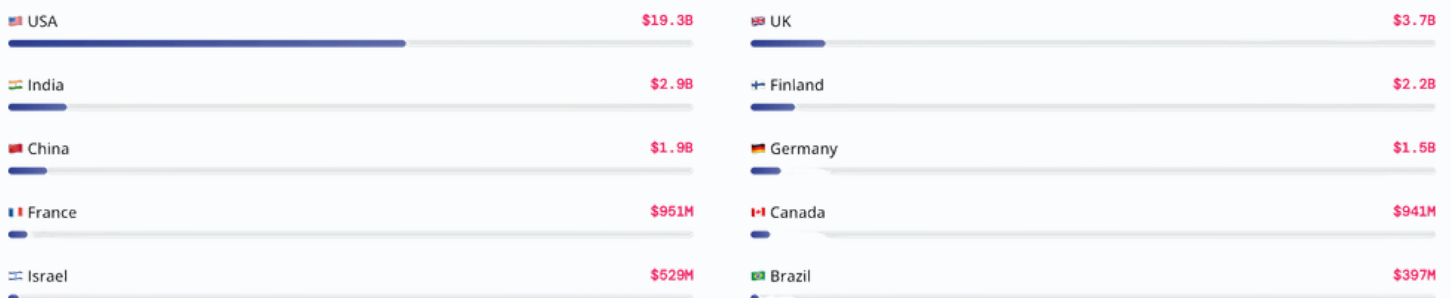
REGIONAL SHARE OF GLOBAL DEALFLOW

North America leads on volume, but Europe closed the gap in 2025.



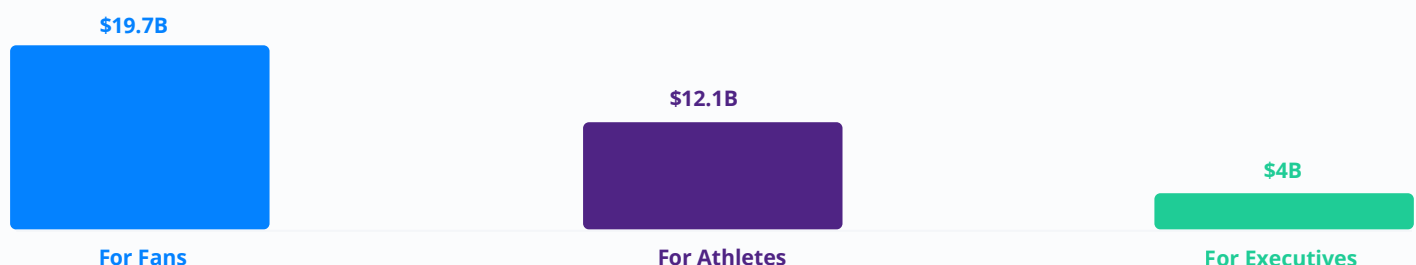
TOP COUNTRIES BY FUNDING

The USA accounts for the majority of capital raised, but the gap to the next tier is narrowing.



SECTOR SPLIT BY INVESTMENT

'For Fans' companies attract the most capital by volume, and their share is growing.



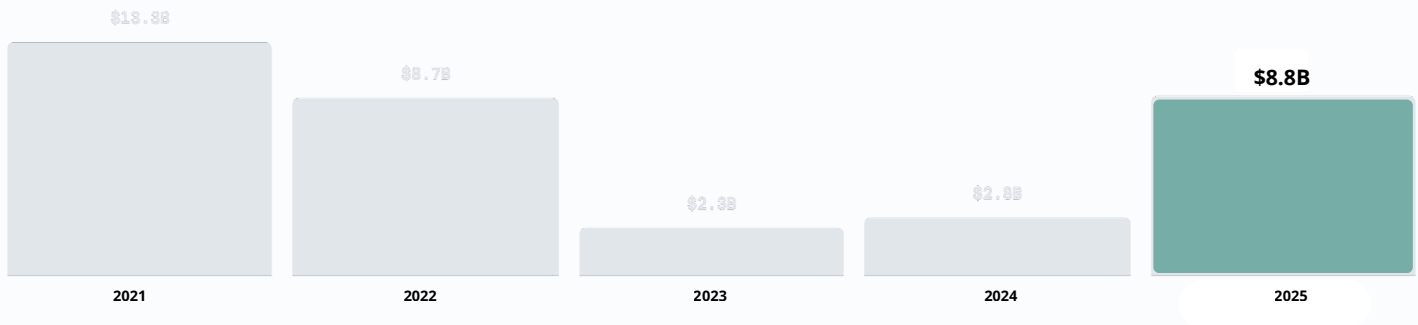
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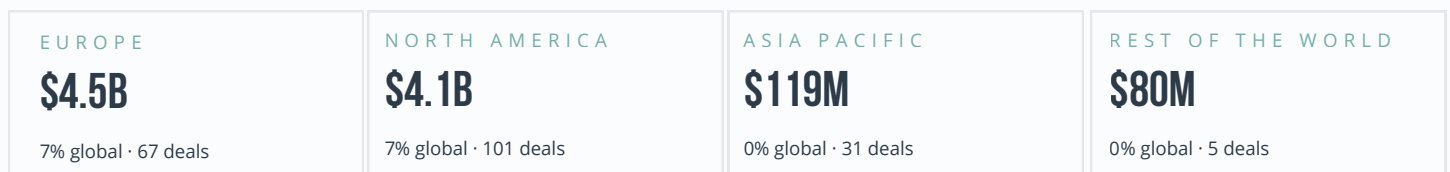
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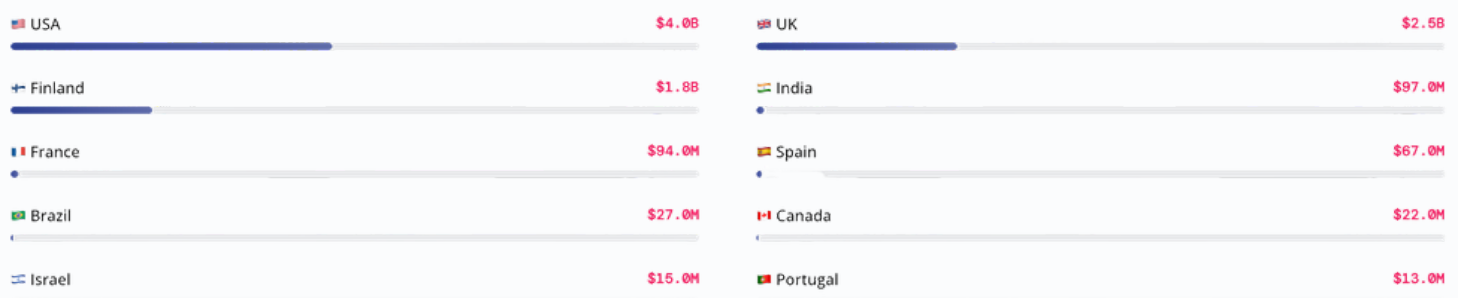
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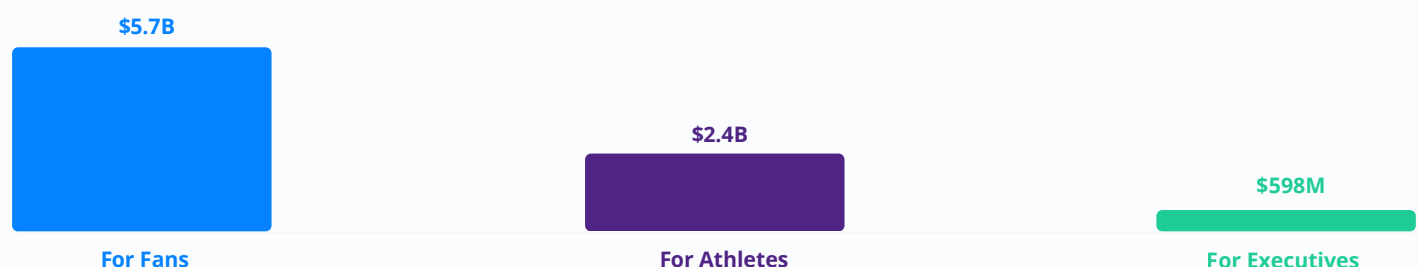
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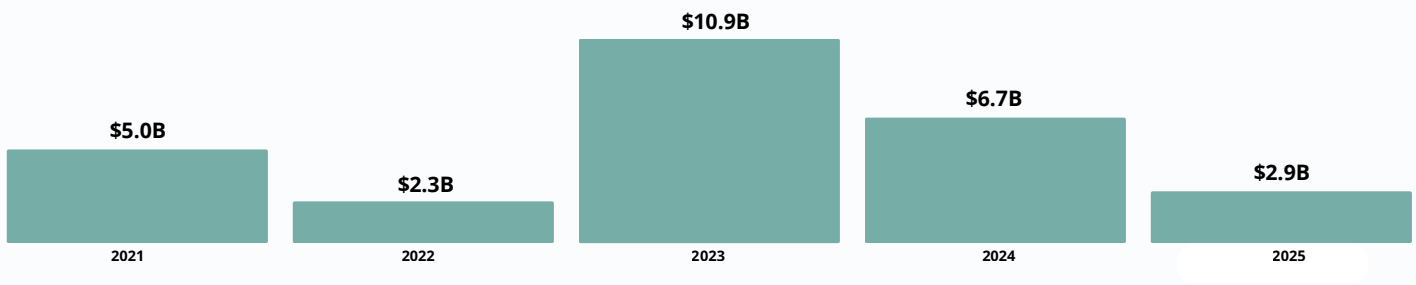
M E R G E R S & A C Q U I S I T I O N S

THE NUMBERS THAT MATTER

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M&A BY YEAR

Deal volume peaked in 2023 at \$10.9B across 70 deals, consolidation has accelerated sharply since 2022.



NOTABLE ACQUISITIONS (2021 - 2025)

The largest disclosed SportsTech acquisitions of the 2021–2025 cycle, ranked by deal value.

All amounts in \$M

Acquiree	Acquirer	Deal Value	Year
Scopely	Savvy Gaming Group	4900.0	2023
Snaitech	Flutter Entertainment	2600.0	2024
ASM Global	Legends	2400.0	2023
Foxtel	DAZN	2200.0	2024
theScore	Penn National Gaming	2000.0	2021
Prizepicks	Allwyn	1600.0	2025
STS Holdings	Entain	946.0	2023
Supersport	Entain	899.0	2022
Openbet	Endeavor	800.0	2022
Jackpot	DraftKings	750.0	2024

NOTABLE ACQUISITIONS (2025)

Significant deals where acquisition value was not publicly disclosed.

All amounts in \$M

Acquiree	Acquirer	Deal Value
Prizepicks	Allwyn	1600.0
Hulu	Disney Streaming (Formerly BAMTECH)	439.0
Disney hulu + Live Tv	fuboTV	220.0
BlockchAI n Digital Infrastructure	Signing Day Sports	215.0
Napster	Infinite Reality)	207.0
Impect	Catapult	91.0
Curve Games	Nazara Technologies	29.0
Perch	Catapult	28.0
SMAAASH	Nazara Technologies	14.0
Galaxy Racer (GXR)	SEGG Media	10.0

THAT'S A WRAP