

# GLOBAL SPORTSTECH ECOSYSTEM REPORT

JUNE 2024



# About this report

## More eyes on SportsTech

We're back with the 7th edition of our Ecosystem reports, the 2nd in this avatar as the Global SportsTech Ecosystem Report. A bit late this year due to forced changes, but as always, our focus is to present what's happening in different parts of the world and, more importantly, who the main actors are.

The continuous evolution of the market is apparent, with new funds & initiatives consistently entering the market. In terms of new trends, we've highlighted three from 2023:

- A growing focus on B2B solutions, whose share of total investment is higher than ever before.
- Fitness tech continues to turn it up, with new segments attracting investor interest. In 2023 it was GymTech.
- BigTech (Apple, Amazon, Google, Meta & others) are heavily investing in sports, in various ways. From wearables to live streaming to tech partnerships, they are in BigTime.

At our end, SportsTechX will continue to talk about all the latest goings-on. And this year, we will turn our eyes on the Indian SportsTech Ecosystem, one of the fastest-growing in the world. With an event earlier this year and a dedicated report coming up, sports and sports innovation will be a significant part of the India shining story.

While we work on that one, you can enjoy this one. Happy reading.

# #GSTER24



**Rohn Malhotra**

MANAGING DIRECTOR  
ROHN@SPORTSTECHX.COM

# SportsTechX - Market Intelligence for investors & professionals

## About us

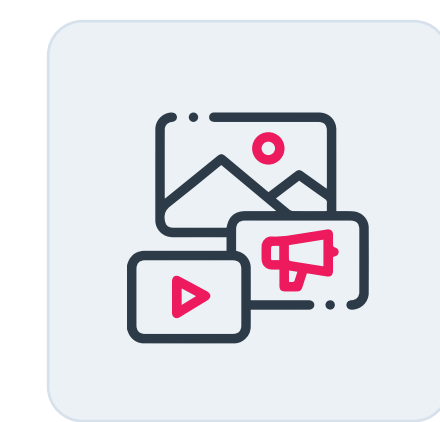
**SportsTechX** is the #1 source for data & insights about startups & innovation in Sports. Our mission is to promote and navigate the global SportsTech ecosystem.

We frequently **publish content** in formats such as industry-leading reports, podcasts and newsletters, and appear as keynote speakers at events. Our insights are based on our **SportsTech Framework** which provides a systematic structure to find, compare and assess all things SportsTech on a global level.

**We work with investors and organisations** in sports and adjacent industries helping them with market analysis and connecting them with startups. We also **support select startups** in business development and fundraising.

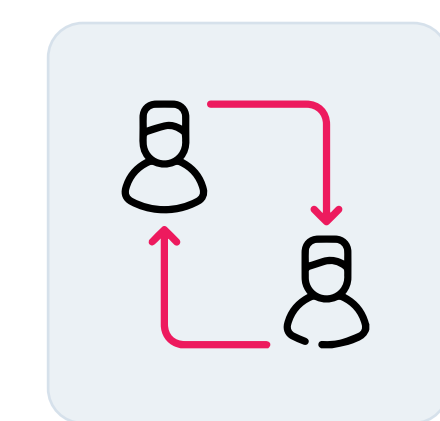


## Services



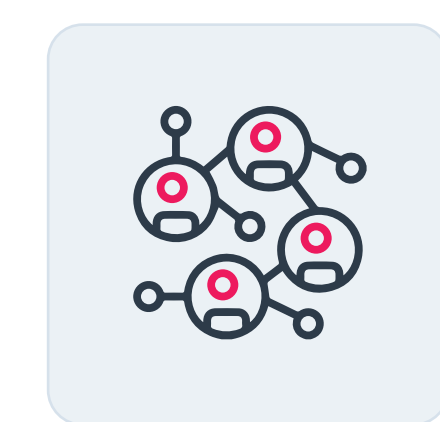
### Content

Industry leading content providing editorial insights and market updates to a B2B audience on all things related to sports and innovation across content formats: text, video and audio.



### Consult

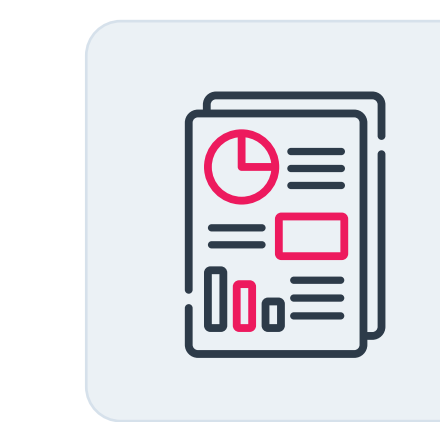
Bespoke projects ranging from workshops on specific topics, co-published research or strategy development to establish stronger presence within the SportsTech Ecosystem.



### Connect

Provide resources and network connections to help startups meet fundraising goals and investors find attractive dealflow.

## Insights



### Reports

Industry-leading reports that combine facts and figures with qualitative insights.



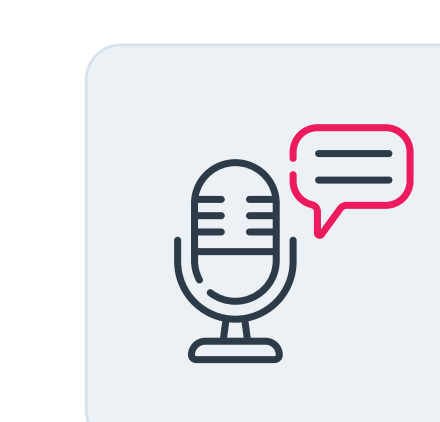
### Database

Leading global database to find the best startups & initiatives to engage with.



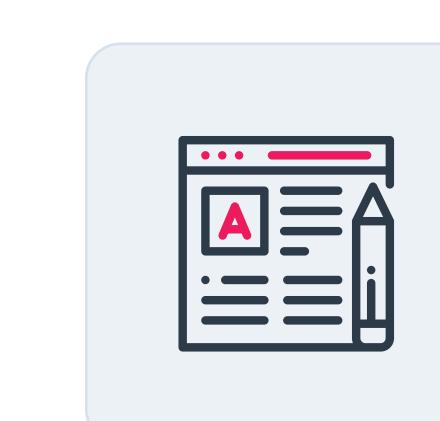
### Newsletter

Cutting through the noise with topic features, interviews & major industry updates.



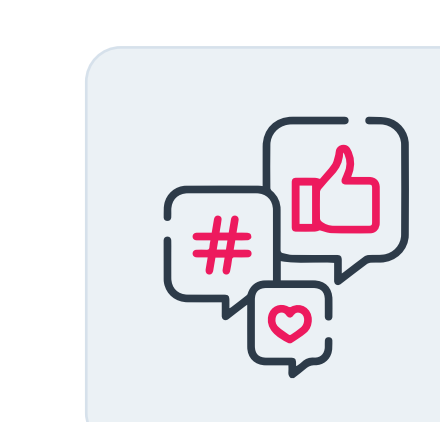
### Podcast

Showcasing startups and relevant initiatives from the world of Sports Technology.



### Blog

Market insights with event reports, landscape overviews and startup related articles.

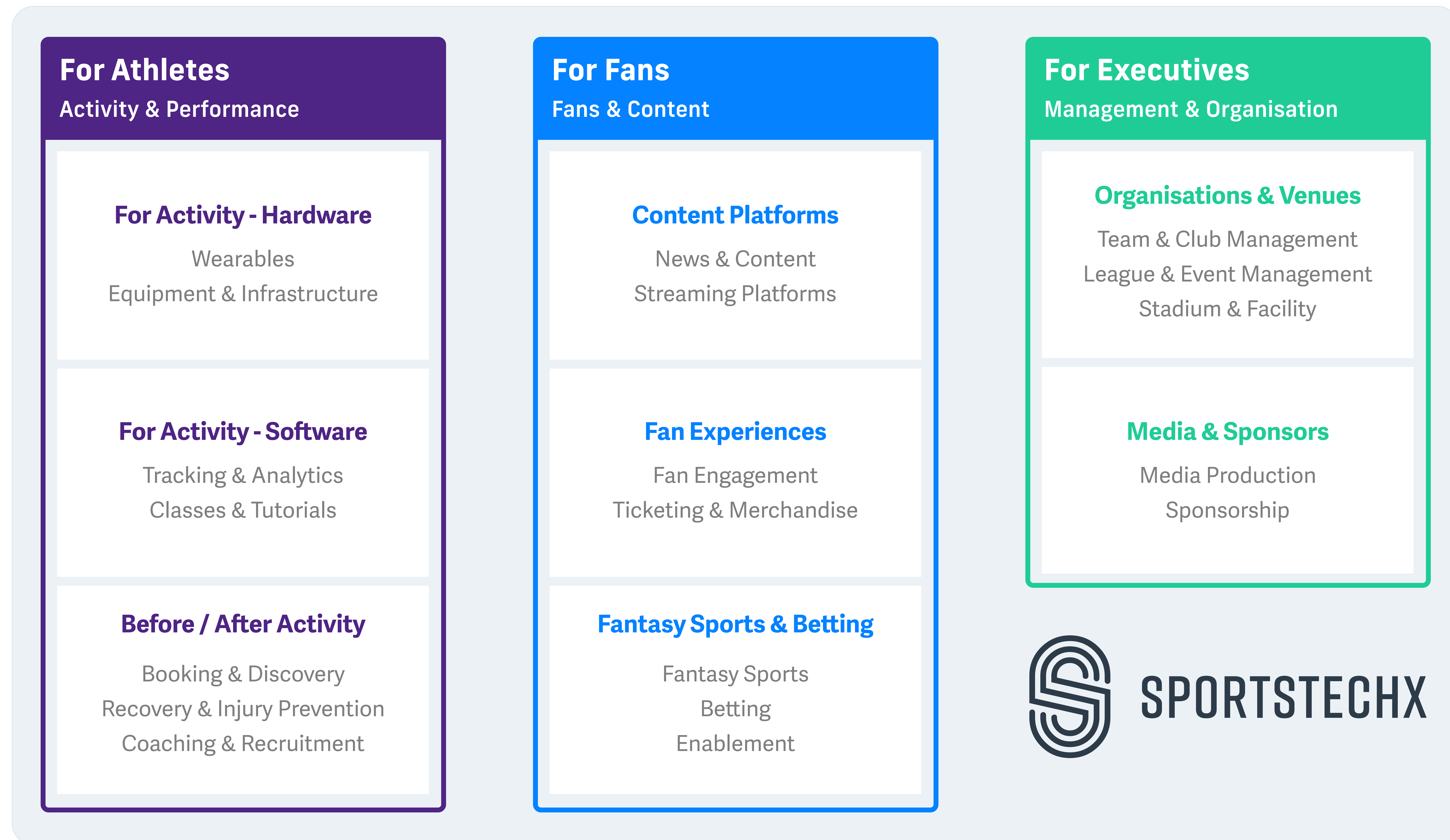


### Social Media

Vodcasts and Tech reviews on YouTube, engaged Global SportsTech Network on LinkedIn & regular updates to LinkedIn, Twitter, Instagram.

# The SportsTech Framework - A systematic approach to the industry

## SportsTech Framework



## About the framework

We introduced the framework in 2017 in order to provide a common understanding and structure for the SportsTech ecosystem. Since then we have constantly enhanced it, to ensure that it's the best and most up-to-date tool to identify, compare and assess all things SportsTech on a global level.

In this latest update, the three main sectors remain the same as before and are organised based on their target audience: The Athlete, The Fan and The Sports Executive. However we have made some updates to the next level of classification - sub sectors and sub-sub sectors - which provide additional levels of detail and a deeper understanding. You'll find a detailed explanation of the updated framework on the following page.

This framework forms the core of all our intelligence, e.g. the reports and the database.

Even though the framework is proven-in-practice, there will always be situations in which startups may be assigned to two or even more sub or sub-sub sectors, which simply cannot be avoided. We invite everyone to share their feedback as we're always looking to further optimize our work.

[Read the full article »](#)



# The Global SportsTech Innovators 2024

A collection of 15 individuals who are collectively driving the growth and the success of the ecosystem through their engagement in new and leading initiatives. We are proud to have them in our report.

● North America ● APAC ● Europe ● ROTW



**Andy Selby**  
Sports Loft



**Anton Brams**  
Match Ventures



**Carolina Chiappero**  
Juventus



**Charles Juba**  
London Marathon



**Chris Schlosser**  
Major League Soccer



**Dr. Cheri L. Bradish**  
Future of Sport Lab (FSL)



**Federico Smanio**  
WeSportUp / Wylab



**Giel Kirkels**  
KNVB



**Guillermo Marín Díaz-Guardamino**  
Global Sports Innovation Center powered by Microsoft



**Jenna Kurath**  
Comcast NBCUniversal SportsTech



**Koen Bosma**  
APEX Capital



**Lloyd Danzig**  
Sharp Alpha Advisors



**Marilou McFarlane**  
Women in Sports Tech (WIST)



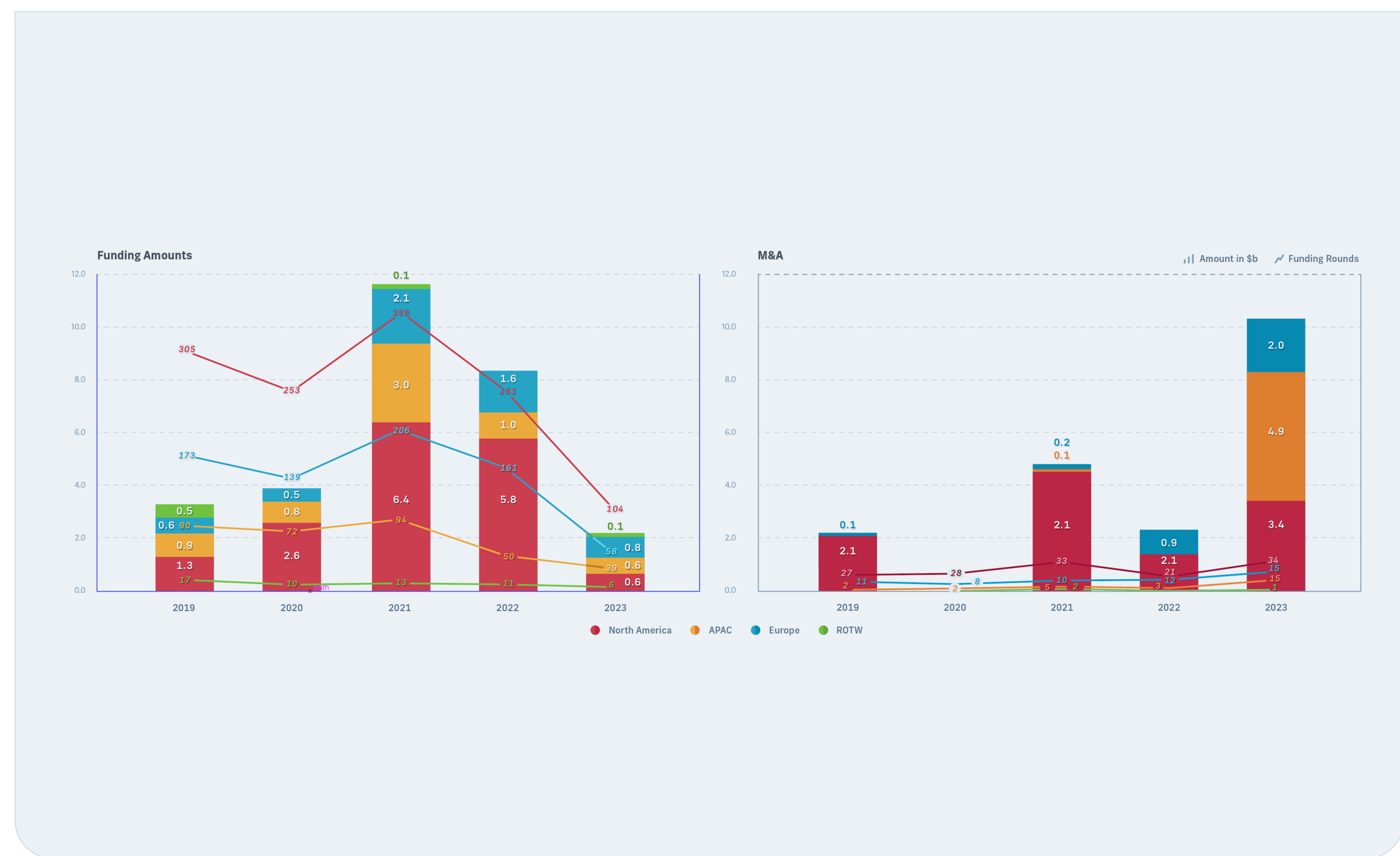
**Mike Yang**  
AquaBloom International Sports Technology Group



**Mustafa Ghouse**  
Centre Court Capital

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The most important investment numbers in Global SportsTech over the last five years. Looked at from geographical, sector and startup perspectives.

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Three deep dives into innovation trends at the forefront of the sports industry, all driven by tech companies. Also includes feature interviews with SportsTech startups.

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### Investors: North America

Lalotte Ventures	LangLeven Group	Maple Leaf Sport & Entertainment	Relay Ventures	Beyond the Game Network	Hawks Ventures	Phoenix capital ventures	LivWell Ventures	Next Ventures	TXV Partners
DRIVE by DraftKings	The Player's Impact	Will Ventures	Causway Media Partners	Phoenix Sports Partner	Ryan Sports Venture	SeventySix Capital	Arcos Partners	Konvoy Ventures	Old Tom Venture
Tickettown Tech	KB Partners	The Collectiv	Elysian Park Ventures	Ludis Capital	Monarch Collective	Pulsar VC	Acies Investments	Bluestone Equity	Courtside Ventures
Comcast NBC Universal SportsTech	HSSE Ventures	JDS Sports	MSP Capital	Next 3	Raine Group	Red Bird Capital Partners	Sharp Alpha Advisors	Mindspring Capital	RX3 Growth Partners
Backswing Ventures	Sapphire Sport	Velocity Capital Management	Fit Insider	Profundance Capital	Oregon Sports Angels	Next Play Capital	Cartan Capital	JAZZ Venture Partners	Mosaic General Partnership
Play Time HoldCo	Scrum Ventures	Stadia Ventures	Brulin Sports Capital						

A comprehensive overview of the Global SportsTech ecosystem covering investors, accelerator / incubator programs and innovation initiatives.

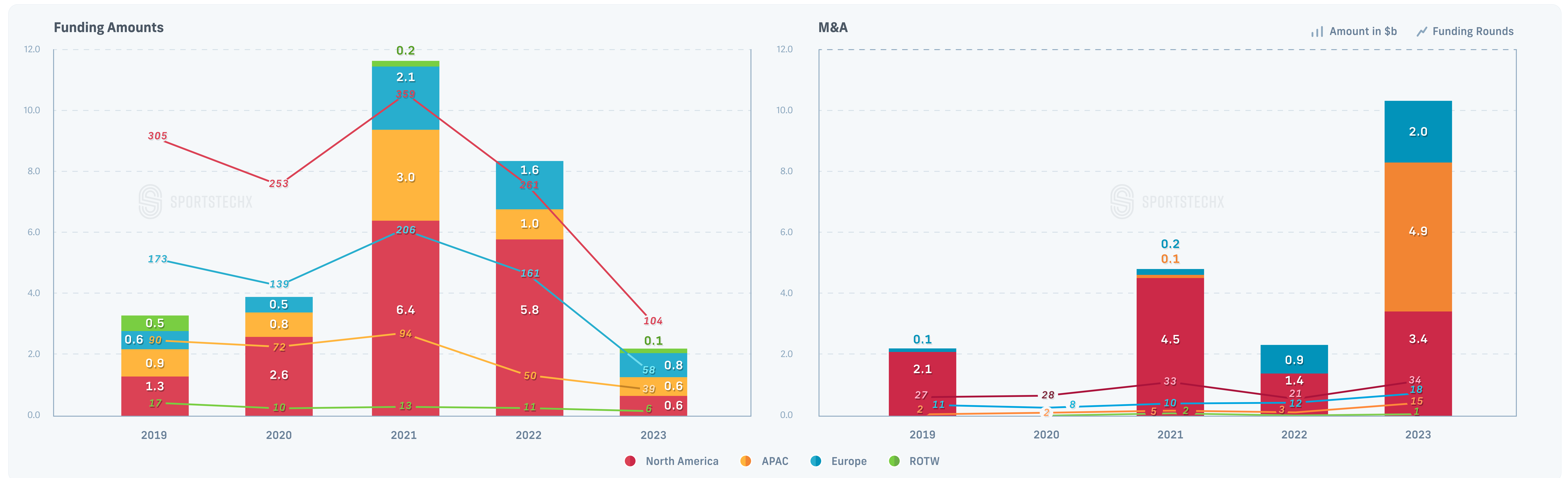
# FACTS & FIGURES

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# North America dominates global dealflow

Nearly \$50b in dealflow over last 5 years



\$49 billion in just over 2,600 deals over the last 5 years in SportsTech. And that is only reported dealflow. By our estimates, possibly only 50% of all deals actually get publically reported. And that number may be as low as 33% in the last 12-18 months. That implies that the actual number could be nearer to ~\$100 billion.

2023 was the 'Year of Consolidation' given the amount of Mergers & Acquisitions deals seen. APAC accounted for 44% of all deals, North America came in second with 33% and Europe third with 23%. Interestingly, looking only at investment deals, Europe topped the list in 2023 with 37%, a big shift from previous years.



# US leads across the last 5 years

## Countries by Region & Funding 2019 - 2023

#	Country	Amount (\$m)	No. Startups (Rank)
<b>North America</b>			
1	USA	15,577.3	1
2	Canada	1,105.8	2
3	Mexico	39.4	3

#	Country	Amount (\$m)	No. Startups (Rank)
<b>Europe</b>			
1	Germany	1,412.2	2
2	UK	1,168.1	1
3	France	943.4	3

#	Country	Amount (\$m)	No. Startups (Rank)
<b>APAC</b>			
1	India	3,252.1	1
2	China	2,760.7	2
3	Australia	193.7	3

+/- Rank change compared to previous year

## Countries by Region & Funding in 2023

#	Country	Amount (\$m)	% of Top Deals
<b>North America</b>			
1	USA	640.1	20.0%
2	Canada	6.5	42.0%

#	Country	Amount (\$m)	% of Top Deals
<b>Europe</b>			
1	Germany	436.4	52.0%
2	UK	150.6	33.0%
3	Italy	124.9	98.0%

#	Country	Amount (\$m)	% of Top Deals
<b>APAC</b>			
1	China	423.3	63.0%
2	India	126.2	36.0%
3	Australia	11.9	83.0%

+/- Rank change compared to previous year

## Germany second in 2023 ahead of China

The USA continues to top investment charts for the last 5 years, also in 2023. However some changes in the 2023 ranking as Germany in second in 2023, ahead of China. Italy jumps ahead to third in Europe and fifth overall with UK and India completing the top 5, which combined account for 91% of all funding in the year.



# Jacksonville stays on top overall

## Cities by Region & Funding 2019 - 2023

#	City	Amount (\$m)	No. Startups (Rank)
<b>North America</b>			
1	Jacksonville	3,545.1	29
2	New York City	2,496.8	1
3	San Francisco	1,776.5	2

#	City	Amount (\$m)	No. Startups (Rank)
<b>Europe</b>			
1	London	1,064.6	1
2	Paris	842.7	2
3	Berlin	714.7	3

#	City	Amount (\$m)	No. Startups (Rank)
<b>APAC</b>			
1	Mumbai	1,878.9	3
2	Bangalore	1,030.6	1
3	Hong Kong SAR	815.9	5

+/- Rank change compared to previous year

## Cities by Region & Funding in 2023

#	City	Amount (\$m)	% of Top Deals
<b>North America</b>			
1	San Francisco	177.5	73.0%
2	New York City	98.9	39.0%
3	Los Angeles	77.1	39.0%

#	City	Amount (\$m)	% of Top Deals
<b>Europe</b>			
1	Munich	229.4	98.0%
2	London	146.0	34.0%
3	Cesena	122.1	100.0%

#	City	Amount (\$m)	% of Top Deals
<b>APAC</b>			
1	Shanghai	265.0	100.0%
2	Hong Kong SAR	120.0	100.0%
3	Delhi NCR	46.7	51.0%

+/- Rank change compared to previous year

## Shanghai top city in 2023, Munich in 2nd

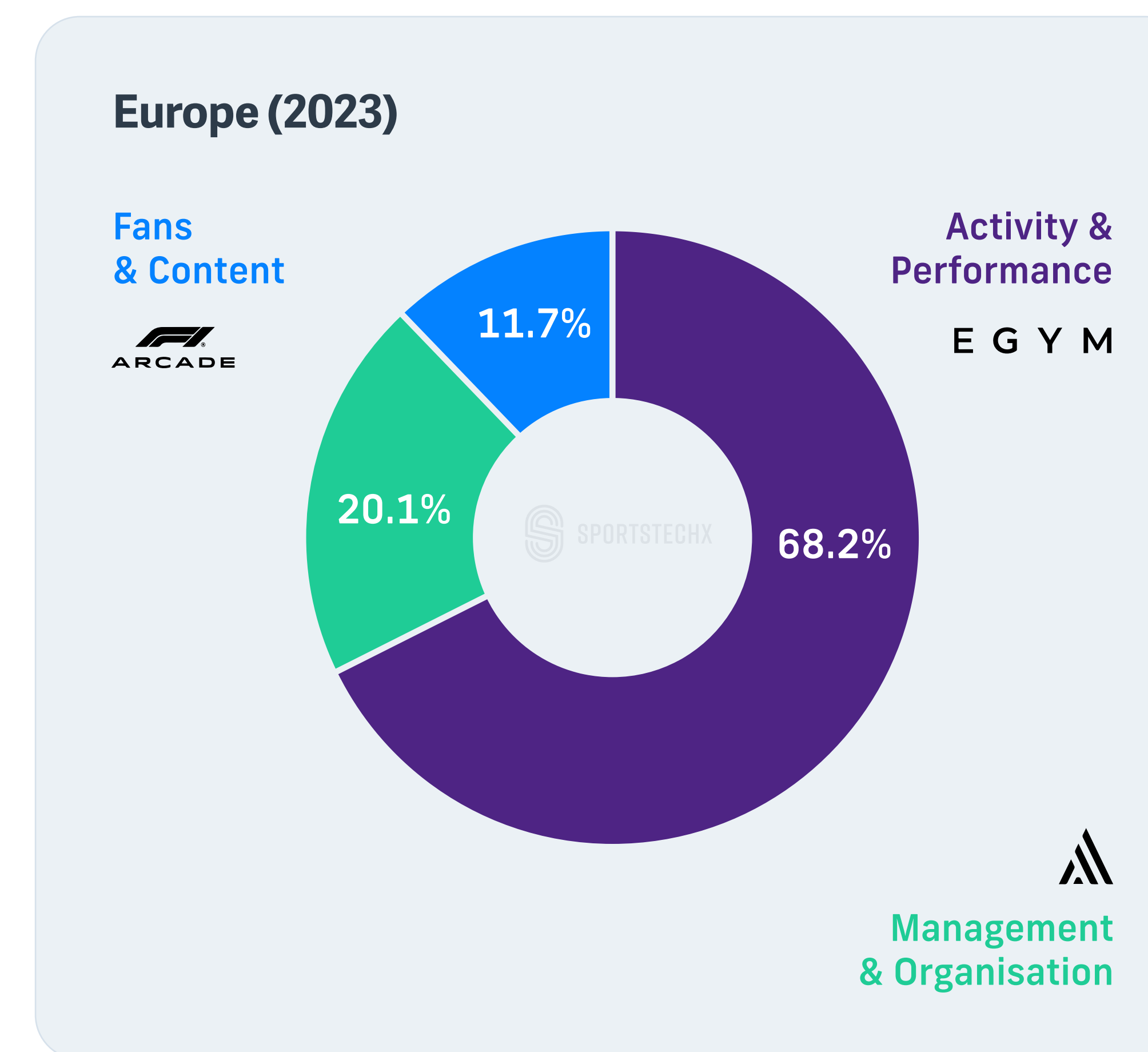
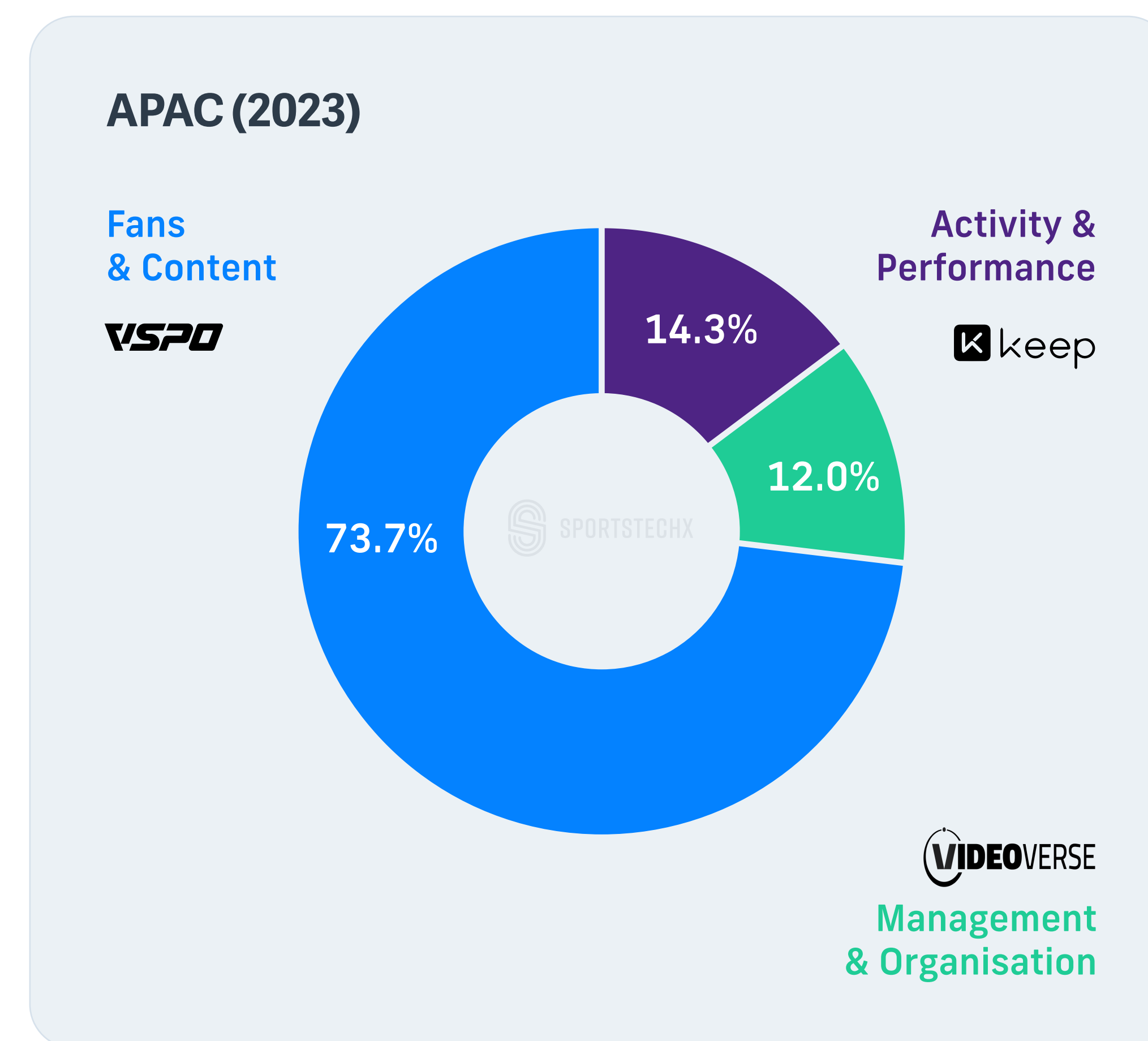
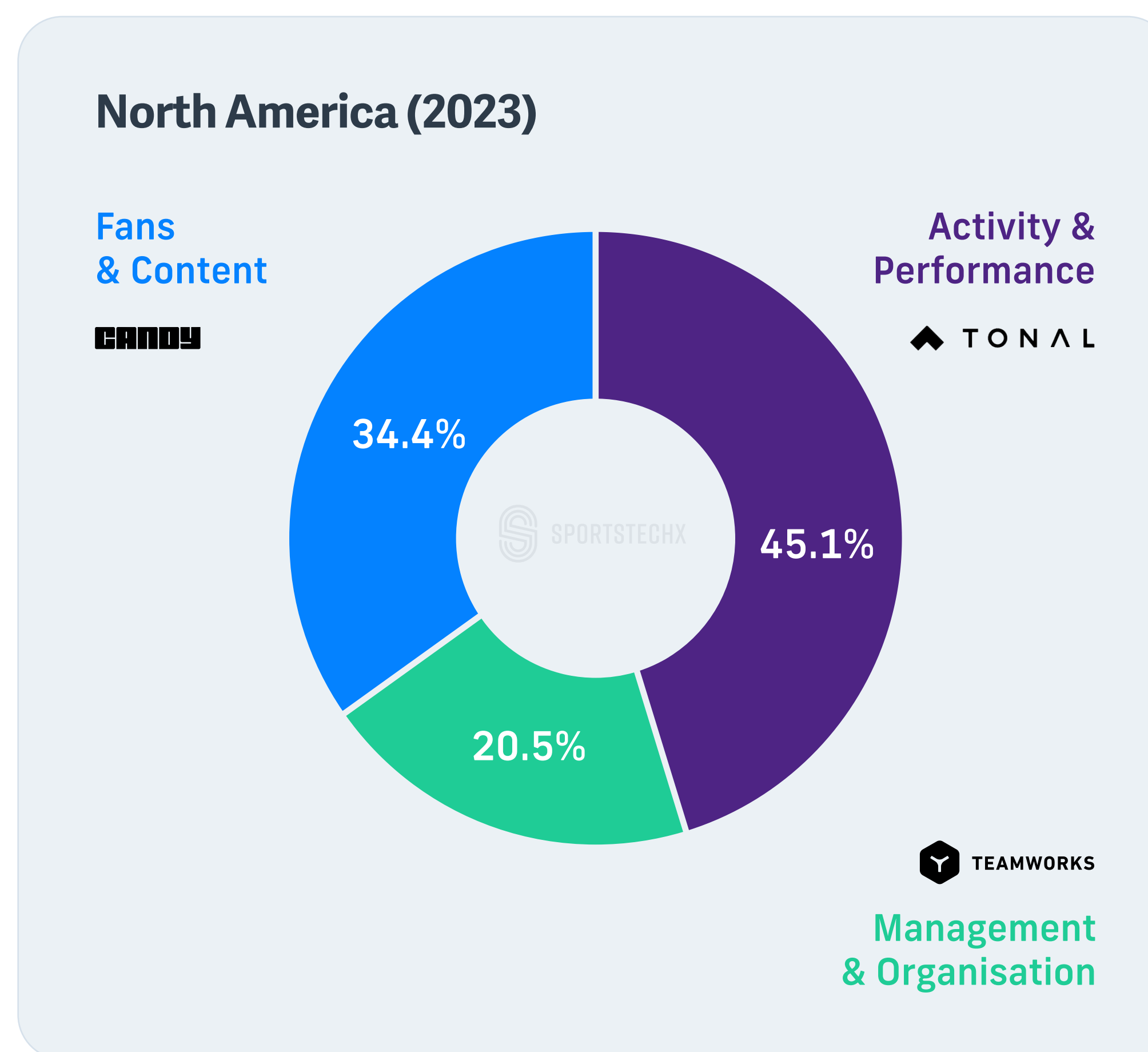
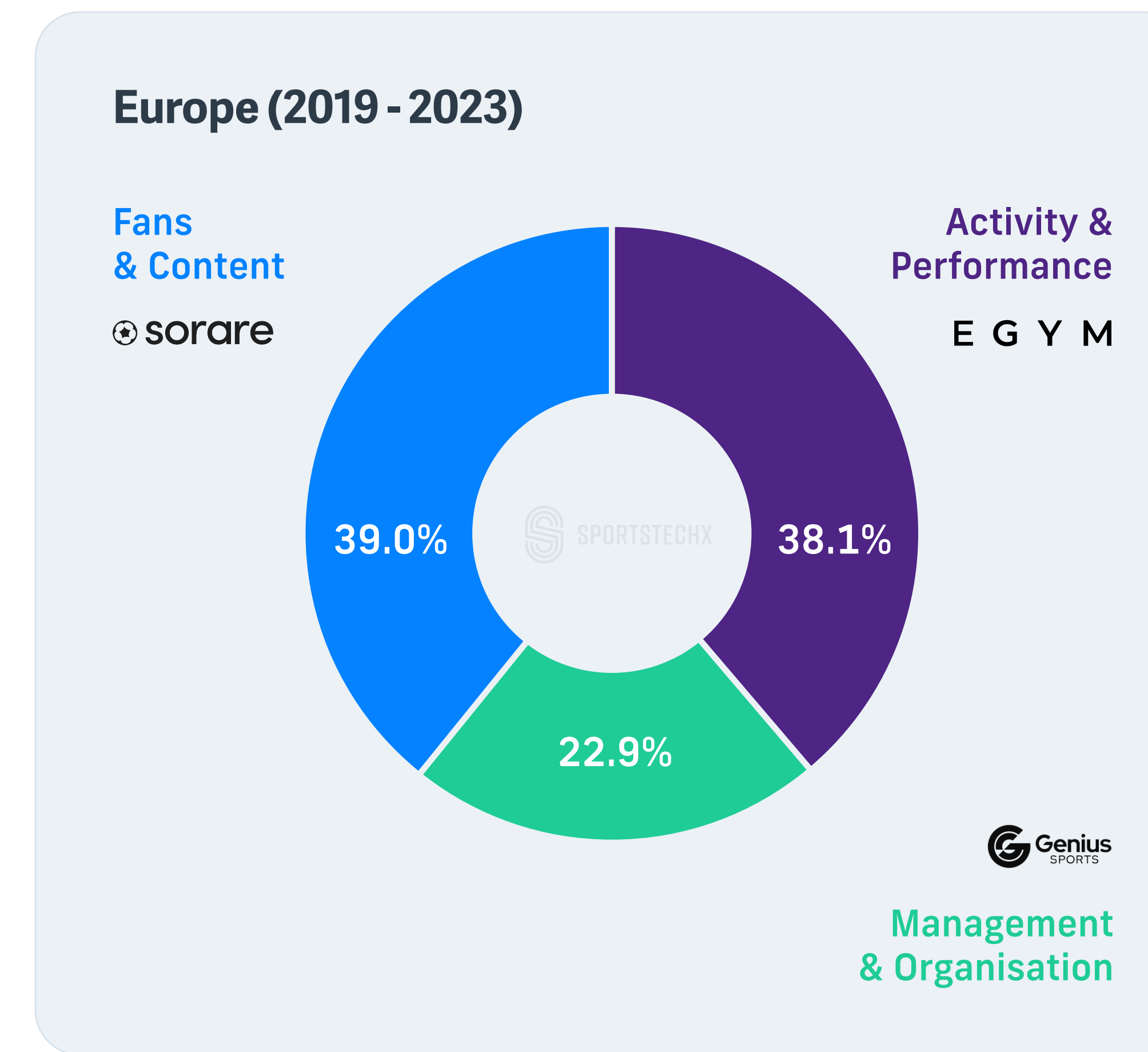
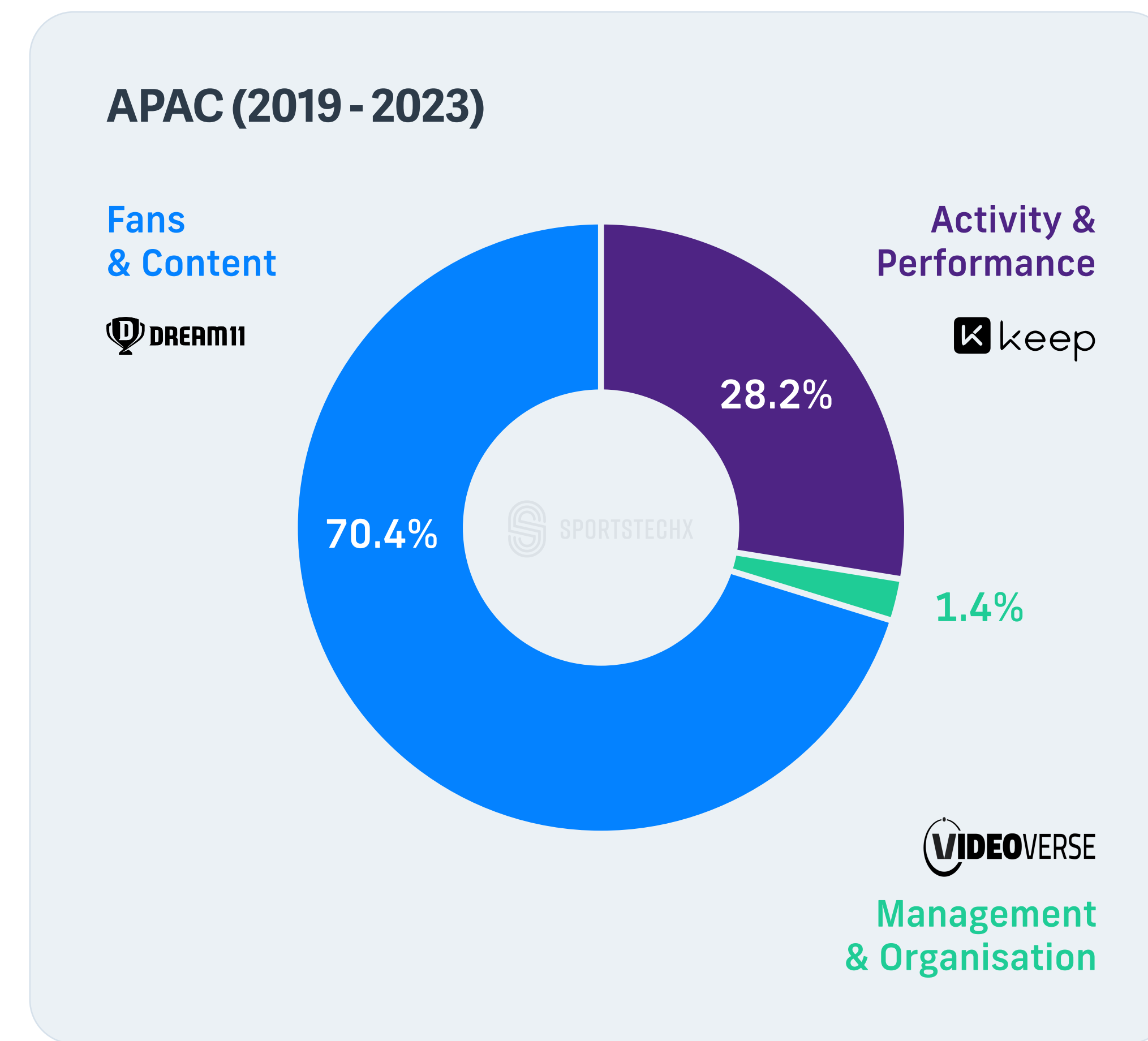
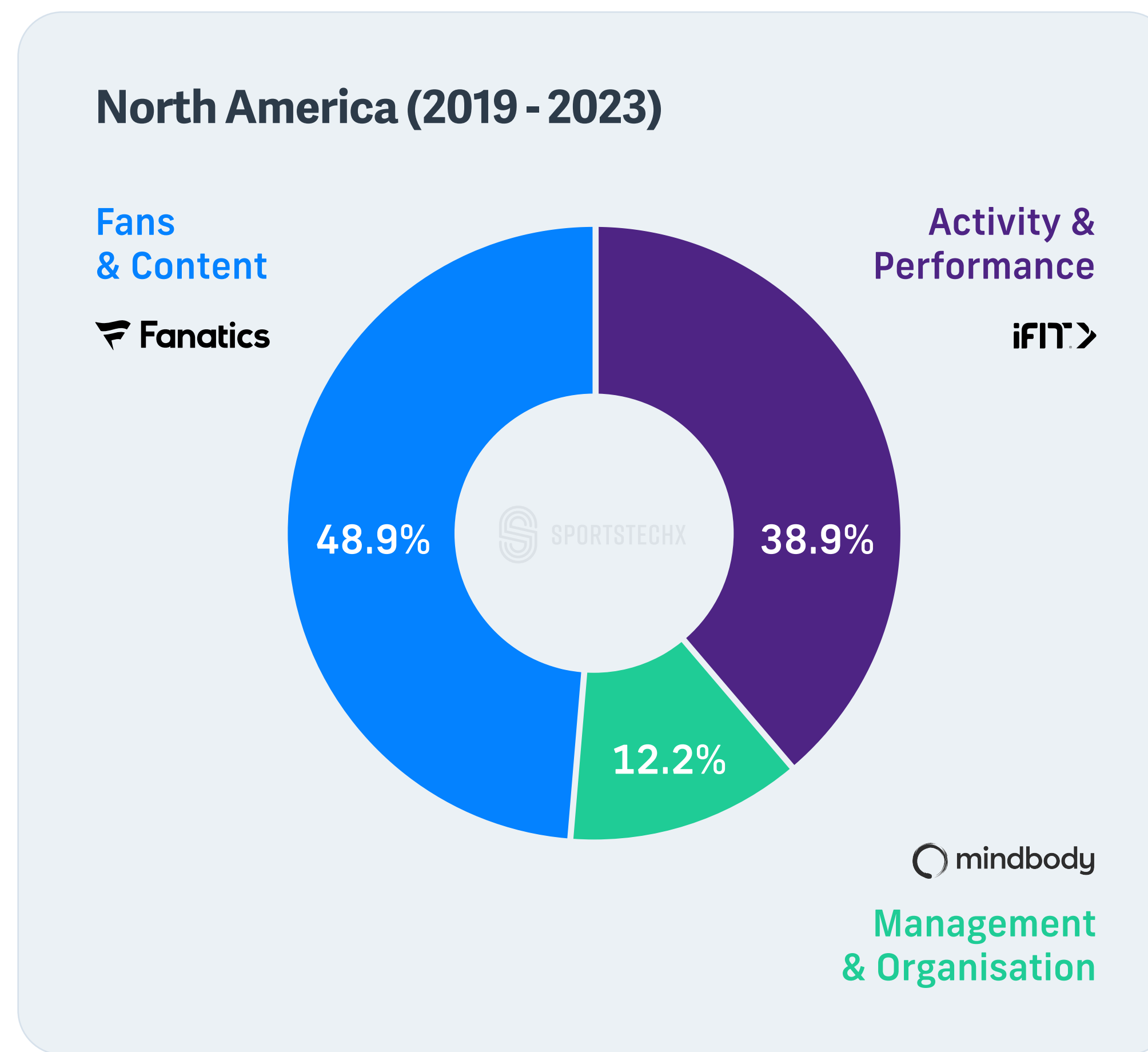
Jacksonville retains its top spot overall as home to the world's biggest SportsTech company, Fanatics. Major changes in 2023 as Shanghai takes top spot ahead of Munich, San Francisco is third and becomes the lead North American city, ahead of New York. Italian city Cesena makes its first appearance on these lists as home to Technogym.



# Fans & Content accounts for over 50% of investment

## Funding per Sector

● For Athletes ● For Fans ● For Executives



## Solutions for Athletes top in 2023 with 47%

The sector wise split varies quite a bit between the regions. Solutions for Athletes (Activity & Performance) top in North America & Europe while Fans & Content leads in APAC. Solutions for Executives (Management & Organisation) which are mostly B2B solutions, have seen their share go up to 20% in North America & Europe, nearly double the usually recorded share of 10-12%.

# Esports & Fitness lead in 2023

## Top Companies All-Time by Region & Funding

#	Name	Location	Amount (\$m)
<b>North America</b>			
1	<b>Fanatics</b> Sports ecommerce, betting & digital collectibles	Jacksonville	5,240.0
2	<b>Disney Streaming</b> (Formerly BAMTECH) Direct to Consumer video at scale	New York City	1,000.0
3	<b>Peloton</b> Smart fitness equipment	New York City	994.7

#	Name	Location	Amount (\$m)
<b>Europe</b>			
1	<b>Sorare</b> Blockchain based fantasy sports platform	Paris	739.0
2	<b>Onefootball</b> Football content platform	Berlin	497.0
3	<b>eGym</b> Smart equipment & software for fitness facilities	Munich	374.0

#	Name	Location	Amount (\$m)
<b>APAC</b>			
1	<b>Dream 11</b> Fantasy sports platform	Mumbai	1,625.0
2	<b>Douyu TV</b> Esports streaming platform	Wuhan	1,128.0
3	<b>Huya</b> Esports streaming platform	Guangzhou	863.6

## Top Companies in 2023 by Region & Funding

#	Name	Location	Amount (\$m)
<b>North America</b>			
1	<b>Tonal</b> Smart fitness equipment	San Francisco	130.0
2	<b>Teamworks</b> Team and Athlete management solution	Durham	65.0
3	<b>Candy</b> Blockchain based digital	New York City	38.4

#	Name	Location	Amount (\$m)
<b>Europe</b>			
1	<b>eGym</b> Smart equipment & software for fitness	Munich	225.0
2	<b>Technogym</b> Fitness and wellness	Cesena	122.1
3	<b>Urban Sports Club</b> Fitness and sports centres booking platform	Berlin	104.5

#	Name	Location	Amount (\$m)
<b>APAC</b>			
1	<b>VSPO</b> Esports content & tournaments platform	Shanghai	265.0
2	<b>Animoca Brands</b> Blockchain based gaming and collectibles	Hong Kong SAR	120.0
3	<b>VideoVerse</b> AI-powered content generation for sports media and production	Mumbai	45.0

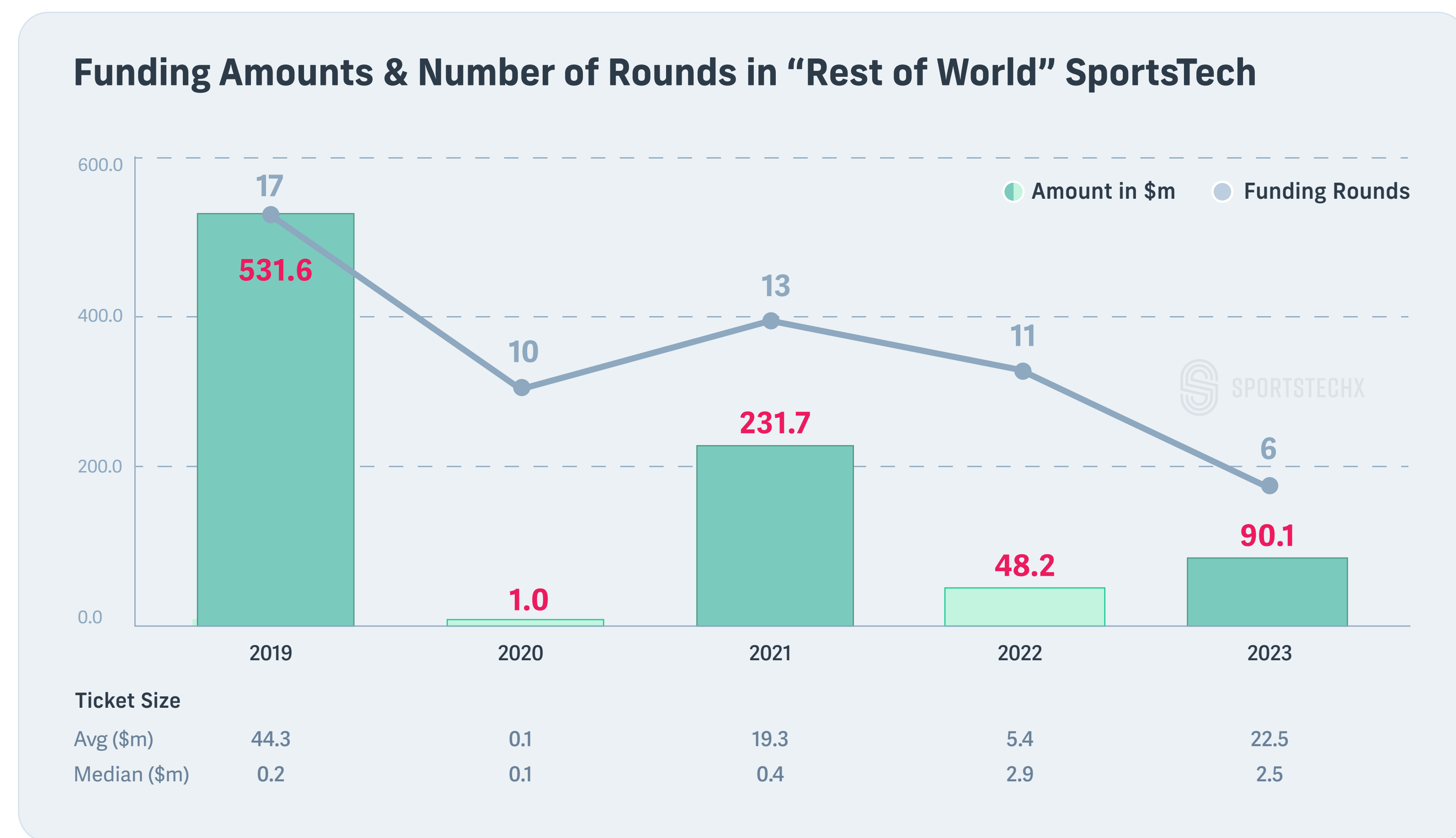
● For Athletes ● For Fans ● For Executives

## B2B companies attract investor interest

Shanghai based VSPO topped the funding charts in 2023, representing the Esports / Gaming industry. Europe was dominated by fitness focussed solutions, especially those operating in the B2B gym & fitness center space: eGym & Technogym. Multiple B2B operators also made the lists in North America (Teamworks and Candy Digital) and APAC (Animoca Brands and Video Verse) showing the clear growth of B2B solutions.

# Brazil the next big SportsTech market

## Rest of World Breakdown



### Top 3 Most Funded Countries in "Rest of World" SportsTech 2019 - 2023

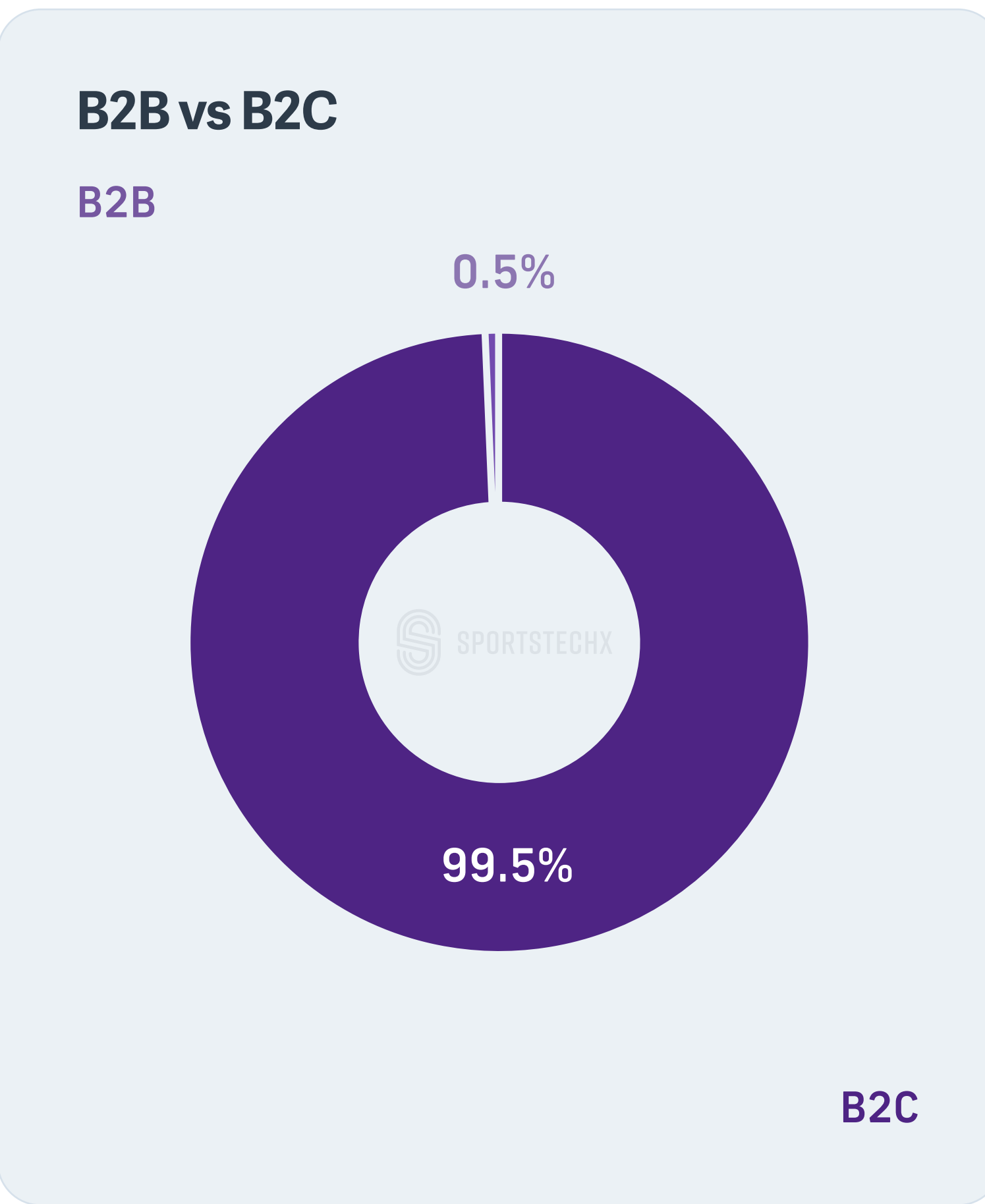
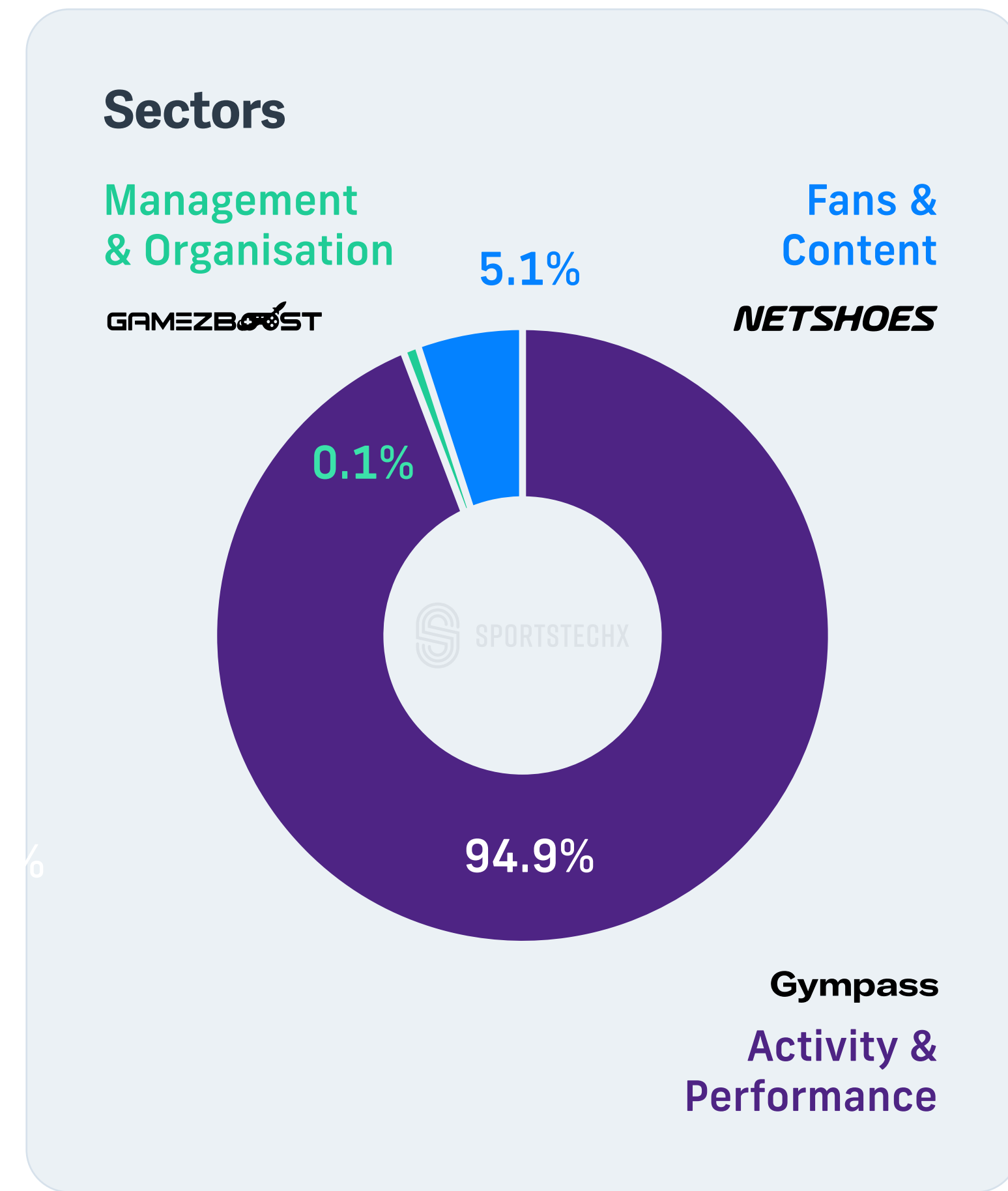
#	Country	Amount (\$m)	Top City
1	Brazil	894.3	Sao Paulo
2	Egypt	4.5	Cairo
3	Argentina	1.9	Buenos Aires

### Top 3 Most Funded Companies in "Rest of World" SportsTech 2019 - 2023

#	Name	Amount (\$m)	Top City
1	Gympass	605.0	Sao Paulo
2	smartfit	229.1	Sao Paulo
3	NETSHOES	215.0	Sao Paulo

### Top 3 Most Funded Companies in "Rest of World" SportsTech 2023

#	Name	Amount (\$m)	Top City
1	Gympass	85.0	Sao Paulo
2	ZIYOU	4.0	Sao Paulo
3	radarfit	1.0	Belo Horizonte



## FitnessTech driving the growth

The Rest of World charts might as well be titled as "Brazil", but the rise of SportsTech in Samba-land is the main reason we include this page. Most of the investment has been in the FitnessTech space, that trend continues in 2023. Sao Paulo is clearly the SportsTech capital in Brazil where the focus is on the end consumer, accounting for nearly 100% of all investment.





# SPORTSTECH DB

Global database to find the best startups in the SportsTech ecosystem with real time analytics.

Sign up at [sportstechx.com/sportstechdb](https://sportstechx.com/sportstechdb) for a 1-day free trial of the PRO DB.

The screenshot displays the Sportstech DB interface. At the top, there is a chart titled 'Funding \$b' and 'No. of Funding Rounds' from 2014 to 2023. Below the chart are filter options for 'Sector By Funding \$b' and 'Sub Sector By Funding \$b'. The main part of the screenshot shows a table of startups with columns for Name, Website, Description, City, Country, Sector, and Sub Sector.

Name	Website	Description	City	Country	Sector	Sub Sector
1. 101 Fit	<a href="http://101fit.com">http://101fit.com</a>	Fitness motion tracking and tracking device	Moscow	Russia	Activity & Performance	For Activity Hardware
2. 1080 The FAN	<a href="http://1080thefan.com">http://1080thefan.com</a>	News & Podcasts platform powered by fans	Portland	USA	Fans & Content	Content Platforms
3. 1080Motion	<a href="http://1080motion.com">http://1080motion.com</a>	Digital motorized strength training equipment	Stockholm	Sweden	Activity & Performance	For Activity Hardware
4. 11 Wickets	<a href="http://11wickets.com">http://11wickets.com</a>	Daily fantasy sports platform	Kolkata	India	Fans & Content	Fantasy Sports & Betting
5. 11.lv	<a href="http://11.lv">http://11.lv</a>	Sports betting platform	Riga	Latvia	Fans & Content	Fantasy Sports & Betting
6. 11TransFair	<a href="http://11transfair.com">http://11transfair.com</a>	Football matches and player discovery app	Hamburg	Germany	Activity & Performance	Before / After Activity
7. 120 Sports	<a href="http://120sports.com">http://120sports.com</a>	120 Sports, a real-time, all-encompassing live vl...	Chicago	USA	Fans & Content	Content Platforms
8. 123on	<a href="http://123on.com">http://123on.com</a>	Easy to create and share interactive videos	Uppsala	Sweden	Management & Organisation	Media & Sponsors
9. 15 Seconds of Fame	<a href="http://15sof.com">http://15sof.com</a>	Delivering fan videoboard moments in stadium	New York City	USA	Fans & Content	Fan Experiences
10. 17FIT Inc.	<a href="http://17fit.com">http://17fit.com</a>	Online software platform focusing for sports fit...	Taipei	China	Management & Organisation	Organisations & Venues
11. 18Birdies	<a href="http://18birdies.com">http://18birdies.com</a>	Game improvement and social platform for golf...	Oakland	USA	Activity & Performance	For Activity Software
12. 1FIT	<a href="http://1fit.com">http://1fit.com</a>	Sports subscription platform	Almaty	Kazakhstan	Activity & Performance	Before / After Activity
13. 1XBit	<a href="http://1xbit.com">http://1xbit.com</a>	Multisport betting platform	Sofia	Bulgaria	Fans & Content	Fantasy Sports & Betting
14. 1d3a	<a href="http://1d3a.com">http://1d3a.com</a>	Video processing, management and catalogu...	Barcelona	Spain	Activity & Performance	For Activity Software
15. 1v1Me	<a href="http://1v1me.com/">http://1v1me.com/</a>	Sports competition platform	New York City	USA	Fans & Content	Fan Experiences
16. 20/20 Armor	<a href="http://2020armor.com">http://2020armor.com</a>	Gamified martial arts equipment	Toronto	Canada	Activity & Performance	For Activity Hardware
17. 247Sports	<a href="http://247sports.com">http://247sports.com</a>	College sports news and recruitment portal	Brentwood	USA	Fans & Content	Content Platforms
18. 2501	<a href="http://2501.world">http://2501.world</a>	Smart video generation service	Toyko	Japan	Management & Organisation	Media & Sponsors

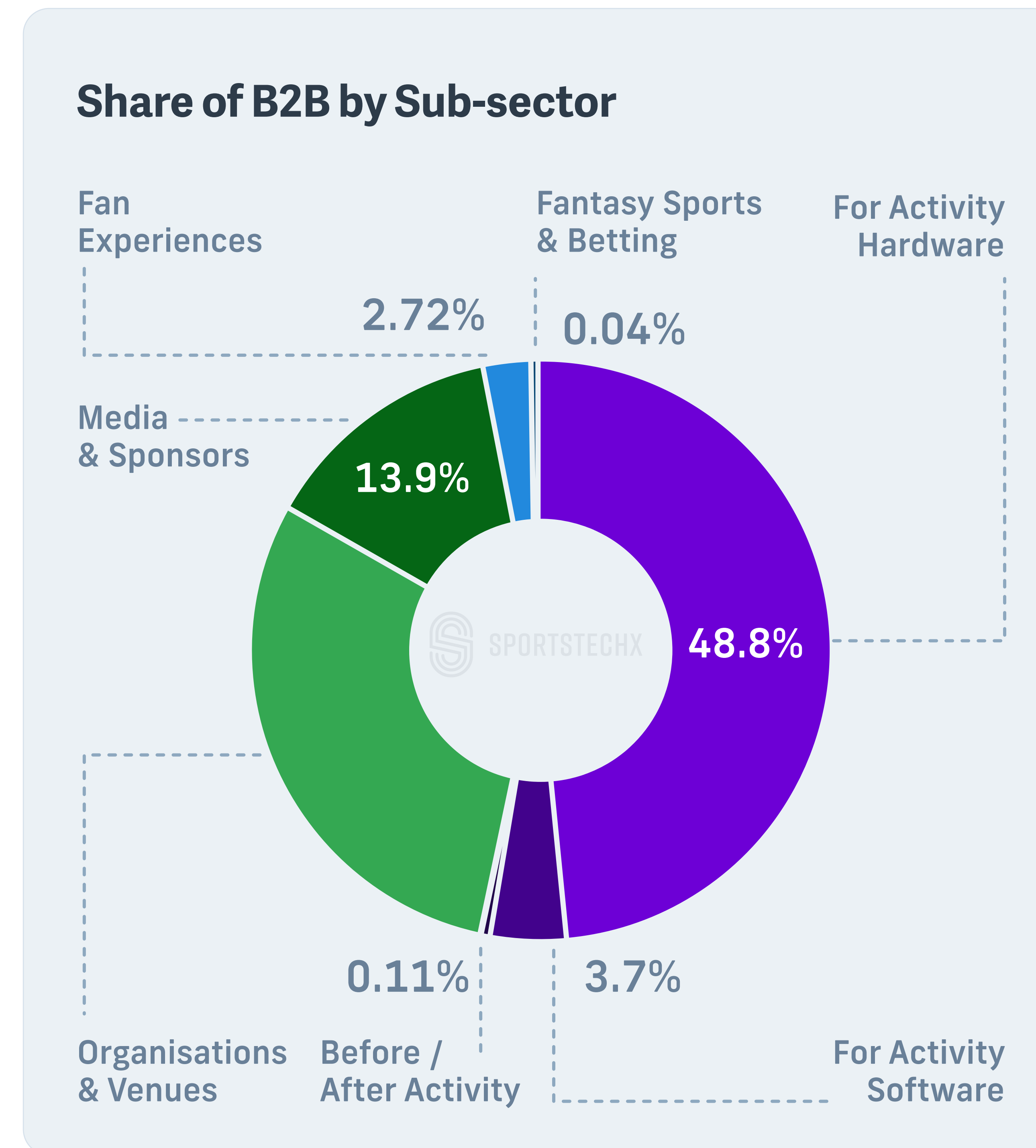
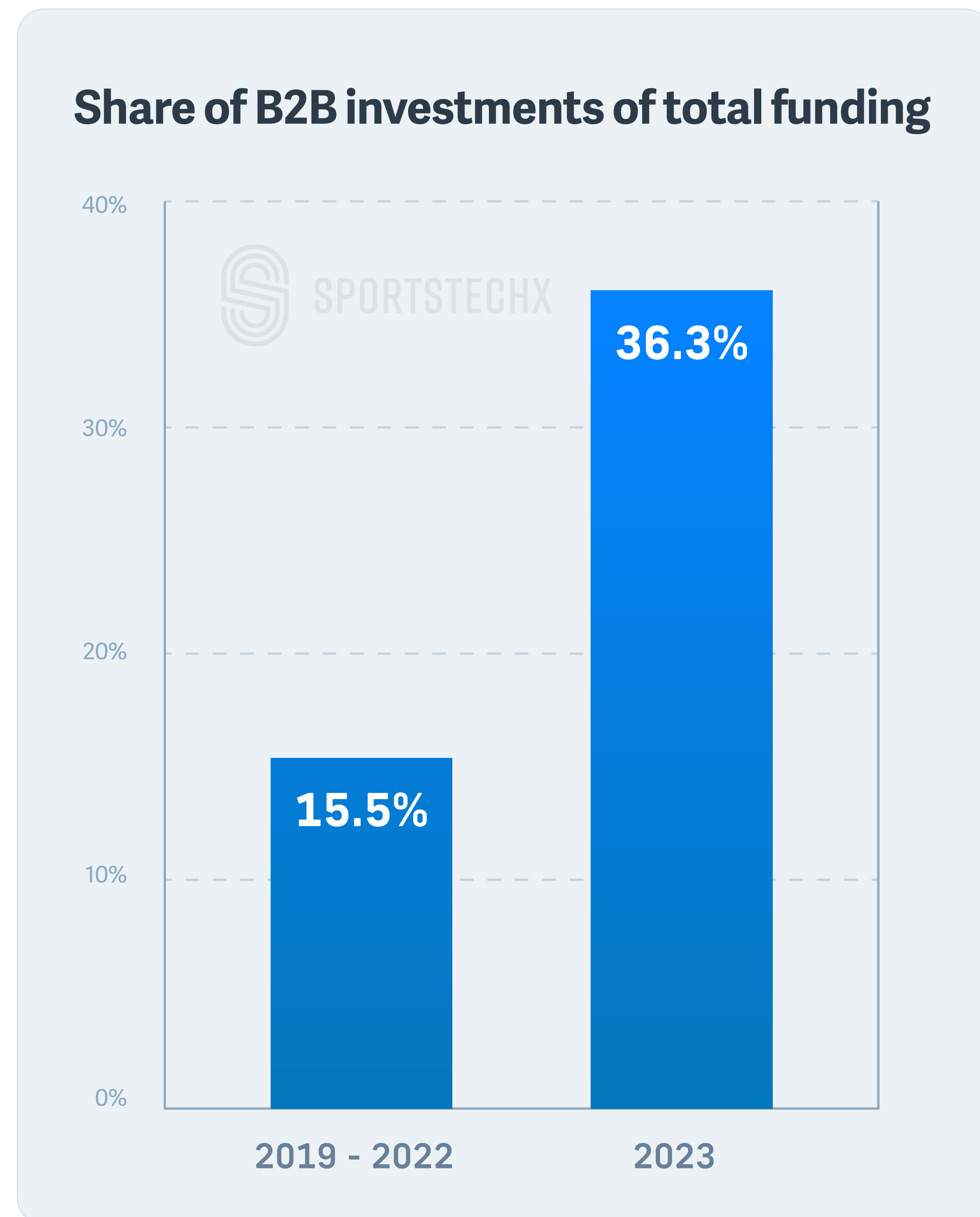
# TRENDS & FEATURES

<b>Trend 1:</b> Interest in B2B Solutions ramping up	15
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# Interest in B2B Solutions ramping up

Share of total investment increases to 36%



### Top 5 Most Funded B2B Companies in Global SportsTech 2023

Name	City	Country	Amount (\$m)
eGym	Munich	Germany	225.0
Technogym	Cesena	Italy	122.1
Sport Alliance	Hamburg	Germany	100.0
Teamworks	Durham	USA	65.0
Veloce Media Group	London	UK	50.0

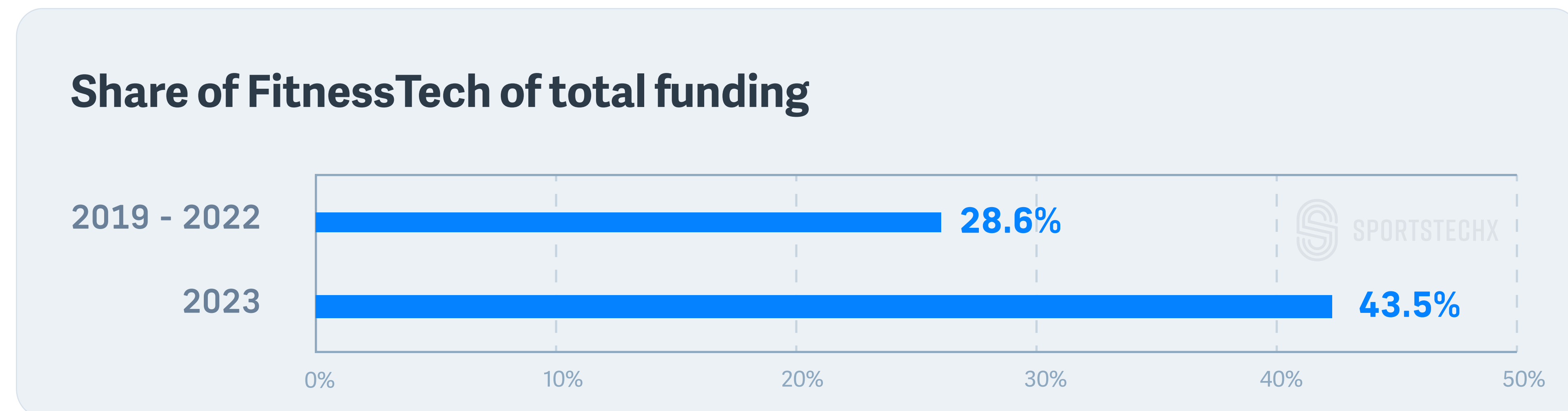
As the sports market grows and team values increase, so does the need for more professional operations. This is reflected in the rising demand for and investment in B2B solutions for the sports industry. The increase from 16% to 36% is a clear indicator of this shift in mindset. Nearly half of that investment (49%) has gone into hardware solutions

related to B2B fitness, including companies providing 'smart gym' equipment and solutions. Organisations and venues (31%) and media and sponsors (14%) make up most of the other half. The growing importance of operational efficiency and better commercialisation is likely to continue.



# FitnessTech is here to stay

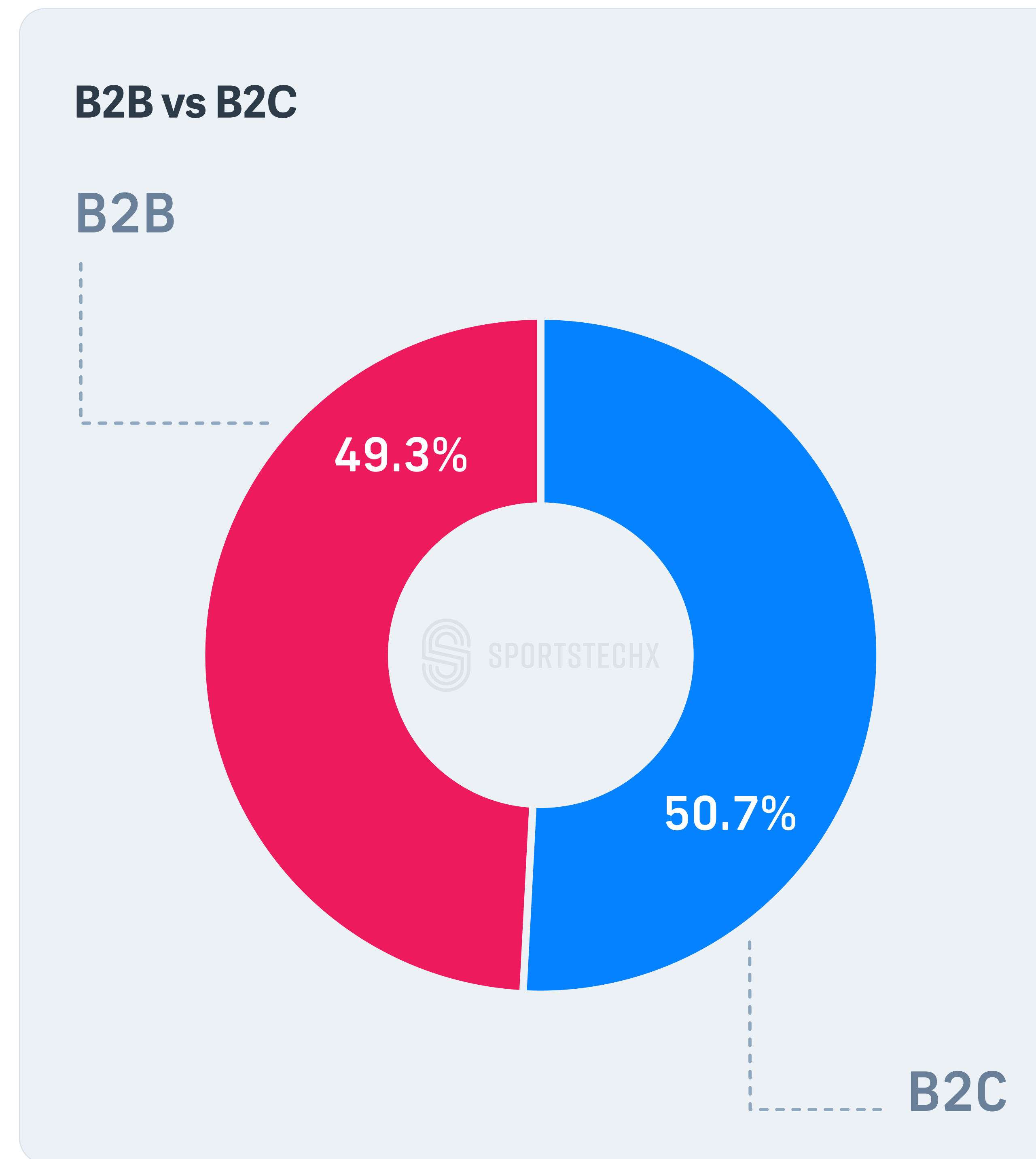
Share of total investment increases to nearly 42%



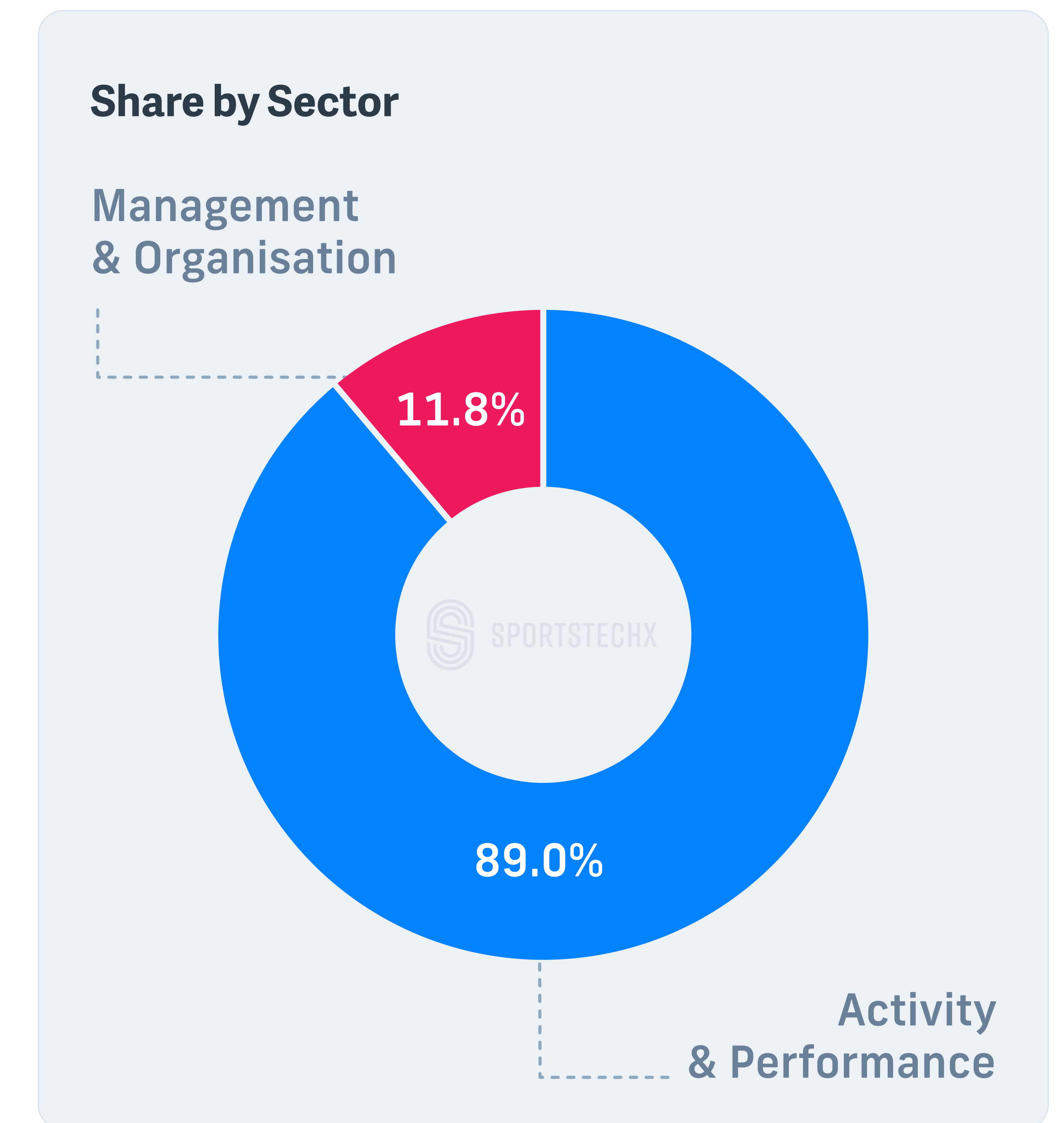
### Top 3 Most Funded Countries in FitnessTech 2023

Name	City	Amount (\$m)
Germany	Munich	429.5
USA	San Francisco	176.1
Italy	Cesena	122.1

Like a relentless trainer, FitnessTech continues to push forward. Almost every year, we look for new trends to discuss, but this segment consistently delivers. A 60% increase is impossible to ignore as the share of funding jumped from an average of 26% to 42% in 2023.



An even split between B2B and B2C solutions, which is interesting to note since this segment has usually been consumer-focused. Solutions for athletes dominate, which is not surprising. However, it is notable that Germany took the lead in this list, with three companies raising significant rounds: EGym, Urban Sports Club, and Sports Alliance.



# BigTech dives deep into sports

Multiple players are looking to establish a presence across categories

Name	Wearables	Live Sports	Innovation Initiative / Partnerships	Fan Experiences
			Digital Athlete  ×	AWS Broadcasting Data for Bundesliga, NFL, F1 AI Game for NFL
	Watch, Vision Pro			VR broadcasting with NBA, MLB, PGA Tour New Sports App
	Pixel Watch			
	Oculus			VR broadcasting on Xtadium (NBA, NASCAR, UFC, DAZN)
Others	Samsung - Watch		  	— Infinity screens at multiple stadiums — Web3 Fan Loyalty Program for Sail GP, Match insights for Premier League — AI Commentary (WatsonX) for Wimbledon, PGA Masters

We've said this for a while: interest in sports is coming from many places, especially Big Tech. And there's a lot going on, we've tried to capture as much information as possible on the table. Live sports streaming is attracting the most interest, starting with the NFL, which has games on Amazon Prime, YouTube, and more recently Netflix. Expect other leagues to follow. Headsets arguably open up the most interesting possibilities around fan

experiences with immersive broadcasting. Some companies have focused on certain sports (Infosys & Tennis), some with innovative tech (IBM & AI commentary), while others have developed key, long-term partnerships with multiple offerings (Microsoft & LaLiga). Wherever you look, the appetite is growing.

# Teamworks: The Operating System for Sports™



**TEAMWORKS**

Fuelling Innovation

6500+ Teams Worldwide

1M Athletes Globally

18M Athletes logins per month

90%  EPL

97%  NFL

80%  NBA

## The Power of Integration

Teamworks Operating System for Sports™ is home to best-in-class products for each stage of the athlete lifecycle. It's ONE complete solution that connects, focuses, and empowers support staff and athletes to drive team performance.

From our roots in Durham, North Carolina, we have expanded to serve athletes and elite sports organizations in 11 countries and counting.

## Integrated & Purpose-Built Solutions

Operations

Performance

Branding

Athlete Development

Recruiting

Compliance

*"We are an innovative club looking for the best solutions for our players and staff, and Teamworks continues to bring best-in-class solutions under their umbrella so each of our departments has a specialized tool to meet their needs."*

**Danny Karbassiyoon**

FOOTBALL PLATFORM LEAD, ARSENAL FC

**Fuel Your Innovation.  
Partner with Teamworks.**

Visit our website or contact us today to explore how Teamworks and The Operating System for Sports™ can help drive innovation in your organization.

TEAMWORKS.COM

# Featured Startups

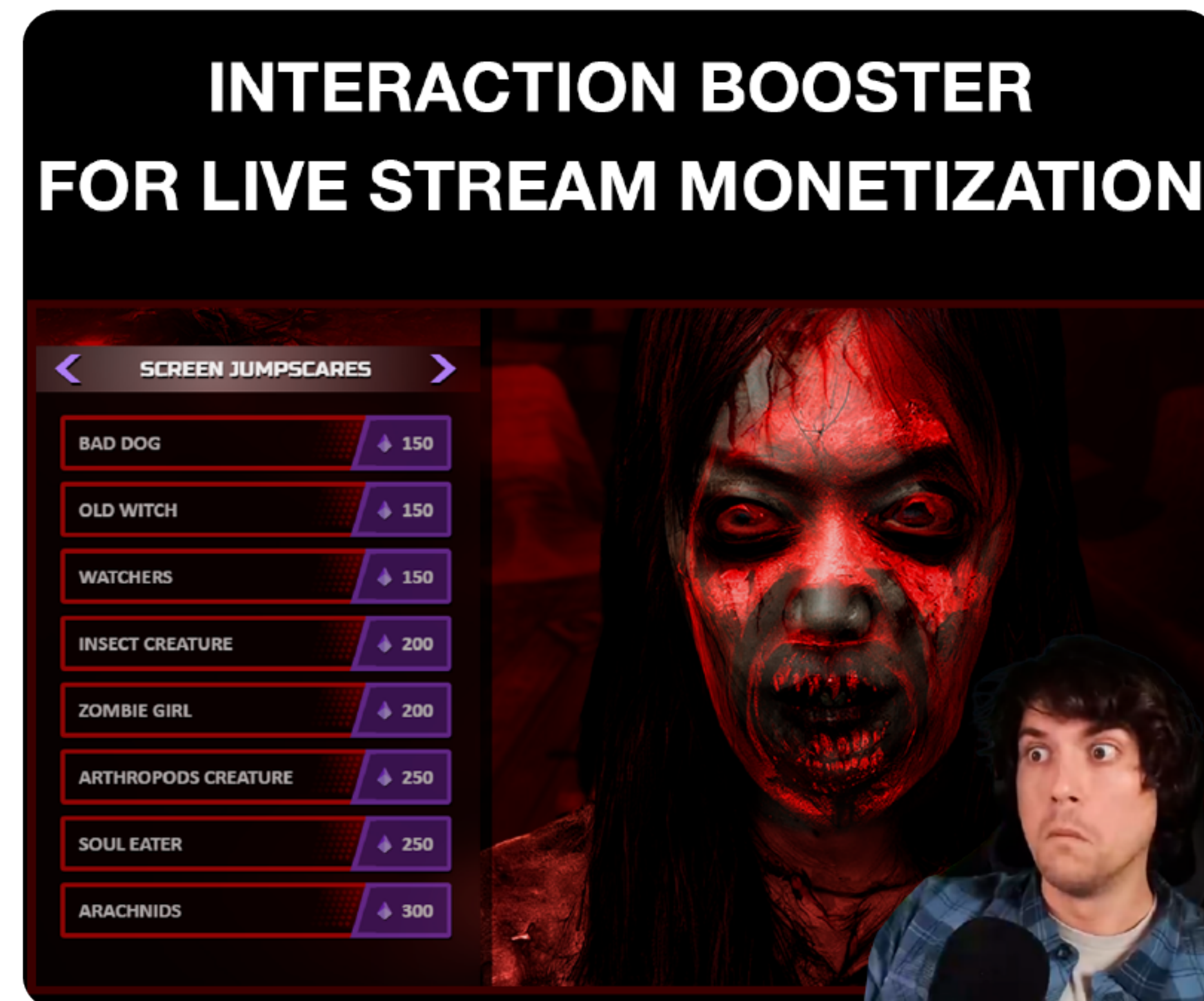


**Anton Ryabichev**  
CEO & FOUNDER

## Chaos Tricks



**Jay Prasad**  
CEO



### The Problem Solved

Chaos Tricks is an interactive extension on Twitch that helps streamers around the world to make their streams more interactive, engaging their viewers to create thousands of in-game events through donations mechanism, hence helping the streamers to earn more, helping the viewers to get more fun and helping the platforms to boost the view time of every stream on which our extension is used.

### Key Achievements

Thousands of happy streamers have used our product, millions of events have been already activated. We even provide tailor made marketing solutions for brands to create next-level interactive marketing campaigns within live streams. Our product can work in any game, all content is original and developed by us.

### Next 12-18 Months

- New in-game events, of course
- Subscription model that opens up new content for streamers and their viewers
- Joint live in chat voting for triggering special events
- Integration with TikTok, YouTube, Kick, Discord and other platforms
- Interactive tournaments and show-matches between streamers where viewers can influence the gameplay
- More bolt-on marketing solutions for brands to use

VÄSTERÅS, SWEDEN [CHAOSTRICKS.COM](http://CHAOSTRICKS.COM)



### The Problem Solved

Relo Metrics is an AI-powered sponsorship analytics platform that enables brands to track and optimize their sponsorship investments. It also powers teams and leagues with the insights they need to retain and grow revenue. Relo helps understand the valuation and outcome of a sponsorship by tracking sponsor exposure across live broadcasts, social media, and streaming platforms, but with more granular and accurate analytics on the performance of their sports sponsorship investments.

### Key Achievements

We're redefining the sponsorship analytics landscape. Relo Metrics stands as the only end-to-end solution in sports and entertainment sponsorship and integrated marketing, offering unparalleled insights through our proprietary computer vision and AI software. Our clients are empowered to make data-driven decisions that maximize the ROI of their sponsorships and marketing efforts.

### Next 12-18 Months

We're launching the sponsorship measurement across earned media, owned website & in-venue valuations. This allows clients to see more value through their partnerships & have highly engaged fans. In the coming months, we will also focus on increasing complementary, strategic partnerships in sports marketing, giving clients a complete picture of their sponsorship performance.

SANTA MONICA, CALIFORNIA [RELOMETRICS.COM](http://RELOMETRICS.COM)

# Featured Startups



## Key Achievements

The inventors behind 1080 Motion introduced the first digital motorized strength training equipment in 2009. Now, over 120 professional teams, including those in the Premier League, Bundesliga, NFL, NBA, NHL, and MLB, rely on 1080 machines. Athletes using 1080 often secure victories in the Olympics. Moreover, our technology is trusted in sports rehabilitation clinics, academic research, and elite military training centers.

## The Problem Solved

We're dedicated to developing user-friendly applications rooted in science. Whether it's strength, speed training or testing, we've got you covered. With our 1080 digital motorized cable machines, you will experience:

- Increased efficiency for better results.
- Enhanced engagement with real-time biofeedback and personalized guidance.
- Optimal safety with full control over loads and speeds.

## Next 12-18 Months

Generation 2 software and machines provide a better user experience at a lower cost. Powered by batteries the new machines are portable, smaller and easier to use. We are ready to address the larger mass market - gyms and rehabilitation, in addition to a continued growth in elite sports.

VÄSTERÅS, SWEDEN

1080MOTION.COM



## Key Achievements

OLIVER has a customer base of +200 teams and 8,600 players. The platform has been successfully implemented in the academies of FC Barcelona, Real Betis, Getafe, Racing Santander, São Paulo, among others clubs, leagues and federations. The Barça tracker, launched in April with FC Barcelona, sold out within the first week. Lastly our tech was selected for the FIFA Innovation Program.

## Next 12-18 Months

Expect OLIVER Sports to surge in commercial growth, expand into new markets like the US, and forge more collaborations for white label products. We're dedicated to broadening our client base, strengthening industry partnerships through our recent API. The focus remains on sales traction, delivering unparalleled value to clients and collaborators alike.

## The Problem Solved

OLIVER tackles the lack of actionable insights to improve performance. The OLItacker collects data from training and game sessions, automatically transforming it using proprietary AI into personalized feedback and video recommendations on how to improve. Additionally, the app provides a gamified experience featuring incentives, comparisons, and rewards, empowering athletes, coaches, and organizations to gain a competitive edge.

BARCELONA, SPAIN [OLIVERSPORTS.AI/BARCA-TRACKER](https://OLIVERSPORTS.AI/BARCA-TRACKER)



## Listen to the SportsTech AllStars Podcast



Conversations with startups, investors and leading initiatives from the world of Sports & Tech

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[newsletter.sportstechx.com](https://newsletter.sportstechx.com)

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# ECOSYSTEM OVERVIEW

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# Global SportsTech Investor Ecosystem 2024

## Investors: North America

<b>Lalotte Ventures</b> 🇨🇦 MONTREAL	<b>LangLeven Group</b> 🇨🇦 MONTREAL	<b>Maple Leaf Sport &amp; Entertainment</b> 🇨🇦 TORONTO	<b>Relay Ventures</b> 🇨🇦 TORONTO	<b>Beyond the Game Network</b> 🇺🇸 ATLANTA	<b>Hawks Ventures</b> 🇺🇸 ATLANTA	<b>Phoenix capital ventures</b> 🇺🇸 ATLANTA	<b>LivWell Ventures</b> 🇺🇸 AUSTIN	<b>Next Ventures</b> 🇺🇸 AUSTIN	<b>TXV Partners</b> 🇺🇸 AUSTIN
<b>DRIVE by Draftkings</b> 🇺🇸 BOSTON	<b>The Player's Impact</b> 🇺🇸 BOSTON	<b>Will Ventures</b> 🇺🇸 BOSTON	<b>Causeway Media Partners</b> 🇺🇸 CAMBRIDGE	<b>Phoenix Sports Partner</b> 🇺🇸 CHICAGO	<b>Ryan Sports Venture</b> 🇺🇸 CHICAGO	<b>SeventySix Capital</b> 🇺🇸 CONSHOHOCKEN	<b>Arctos Partners</b> 🇺🇸 DALLAS	<b>Konvoy Ventures</b> 🇺🇸 DENVER	<b>Old Tom Venture</b> 🇺🇸 DENVER
<b>Titletown Tech</b> 🇺🇸 GREEN BAY	<b>KB Partners</b> 🇺🇸 HIGHLAND PARK	<b>The Collectiv</b> 🇺🇸 HOUSTON	<b>Elysian Park Ventures</b> 🇺🇸 LOS ANGELES	<b>Ludis Capital</b> 🇺🇸 LOS ANGELES	<b>Monarch Collective</b> 🇺🇸 LOS ANGELES	<b>Pulsar VC</b> 🇺🇸 LOS ANGELES	<b>Acies Investments</b> 🇺🇸 MANHATTAN BEACH	<b>Bluestone Equity</b> 🇺🇸 NEW YORK CITY	<b>Courtside Ventures</b> 🇺🇸 NEW YORK CITY
<b>Dynasty Equity</b> 🇺🇸 NEW YORK CITY	<b>HBSE Ventures</b> 🇺🇸 NEW YORK CITY	<b>JDS Sports</b> 🇺🇸 NEW YORK CITY	<b>MSP Capital</b> 🇺🇸 NEW YORK CITY	<b>Next 3</b> 🇺🇸 NEW YORK CITY	<b>Raine Group</b> 🇺🇸 NEW YORK CITY	<b>Red Bird Capital Partners</b> 🇺🇸 NEW YORK CITY	<b>Sharp Alpha Advisors</b> 🇺🇸 NEW YORK CITY	<b>Mindspring Capital</b> 🇺🇸 NEWPORT BEACH	<b>RX3 Growth Partners</b> 🇺🇸 NEWPORT BEACH
<b>Backswing Ventures</b> 🇺🇸 ORLANDO	<b>Sapphire Sport</b> 🇺🇸 PALO ALTO	<b>Velocity Capital Management</b> 🇺🇸 PALO ALTO	<b>Fitt Insider</b> 🇺🇸 PITTSBURGH	<b>Proflunce Capital</b> 🇺🇸 PITTSBURGH	<b>Oregon Sports Angels</b> 🇺🇸 PORTLAND	<b>Next Play Capital</b> 🇺🇸 REDWOOD CITY	<b>Cartan Capital</b> 🇺🇸 SAN FRANCISCO	<b>JAZZ Venture Partners</b> 🇺🇸 SAN FRANCISCO	<b>Mosaic General Partnership</b> 🇺🇸 SAN FRANCISCO
<b>Play Time HoldCo</b> 🇺🇸 SAN FRANCISCO	<b>Scrum Ventures</b> 🇺🇸 SAN FRANCISCO	<b>Stadia Ventures</b> 🇺🇸 ST LOUIS	<b>Bruin Sports Capital</b> 🇺🇸 WHITE PLAINS						



# Global SportsTech Investor Ecosystem 2024

## Investors: Asia-Oceania

<b>Wildcard Ventures</b> MELBOURNE	<b>Athletic Ventures</b> SYDNEY	<b>XT Ventures</b> SYDNEY	<b>XV Capital</b> SYDNEY	<b>Centre Court Capital</b> MUMBAI	<b>Dream Sports Investments</b> MUMBAI	<b>Da One Global Ventures</b> NEW DELHI	<b>Lumikai Ventures</b> NEW DELHI	<b>Asics Ventures</b> KOBE	<b>Play Ventures</b> SINGAPORE
<b>Swing Capital</b> DUBAI									

## Investors: Europe

<b>Trust Esport Ventures</b> BORDEAUX	<b>Athletico Ventures</b> PARIS	<b>Inspiring Sport Capital</b> PARIS	<b>Seventure</b> PARIS	<b>Sparring Sport Group</b> PARIS	<b>BITKRAFT Esport Ventures</b> BERLIN	<b>leAD Sports</b> BERLIN	<b>ADvantage SportsTech Fund</b> JERUSALEM	<b>Remagine Ventures</b> TEL-AVIV	<b>Match Ventures</b> LUXEMBOURG CITY
<b>Apex Capital</b> CASCAIS	<b>CrowdSport</b> BARCELONA	<b>Gaint Venture Capital</b> MALAGA	<b>Shorai</b> VALENCIA	<b>Alima Sport VC</b> AMSTERDAM	<b>Ve2Fund</b> AMSTERDAM	<b>Venturerock</b> AMSTERDAM	<b>Aser Ventures</b> LONDON	<b>Dopamine Sports Ventures</b> LONDON	<b>Guinness Ventures</b> LONDON
<b>Hiro Capital</b> LONDON	<b>Mercuri</b> LONDON	<b>Mercury 13</b> LONDON	<b>Players Fund</b> LONDON	<b>Skin in the game</b> LONDON	<b>Sport Republic</b> LONDON	<b>Sports Investment Partners</b> LONDON	<b>Tekkorp Capital Partners</b> LONDON	<b>Alumni Ventures</b> MANCHESTER	<b>Ruta VC</b> UKRAINE

## Investors: South America

<b>Go4it</b> BRAZIL	<b>Sports angels</b> BRAZIL
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# Investors

## What types of startups / companies are you looking to partner / work with?



**Lloyd Danzig**  
MANAGING PARTNER



We are looking at a lot of fintech, adtech, and data infrastructure solutions across sports, gaming, and entertainment. We see sports as a business built around driving a sense of purpose and connection among fans. Software and new media innovations are critical to the longevity of that business model.



**Koen Bosma**  
PARTNER & HEAD OF VC



If there is one constantly growing trend that we truly believe in, it would be on quantifying human performance. Where the human body was and is a miracle and mystery at the same time, people that used to be classified as 'biohackers' will continue to become more and more mainstream. We are believers that with current tracking devices for sleep, mental health, longevity, movement etc are just scratching the surface and the venture returns will come in this space.



**Mike Yang**  
FOUNDER AND CEO



A. The Major Techs' acceleration (e.g. AI, Robotic, Web3, Biotech...) has become very accessible and affordable; more importantly, the viable applications & monetisation for Global Sports Industry in both quantity and quality! It's just the beginning! B. The surge of China's Industry GDP from 1 to nearly 5 Trillion RMB and it's sustainability driven by National Plan, 400M+ Midclass, marketization etc. Global players will benefit hugely in the coming Golden Decade from this biggest emerging market!



**Anton Brams**  
GENERAL PARTNER



We note the rapid expansion of padel which will soon be the top racket sport on the planet even before becoming an olympic sport. And we believe that startups which can cater to organizations and practitioners in this sport would benefit tremendously in the next couple of years.



**Mustafa Ghouse**  
GENERAL PARTNER



Spatial computing, including augmented reality (AR), virtual reality (VR), and mixed reality (MR), is proving to be a fascinating element within the sports tech sector. The applications of AR/VR technology personalising the viewing experience, enabling fans to see player stats overlaid on the field, access instant replays from their preferred angle, or virtually interact with other fans in a shared space along with its application on the field make it an exciting trend within Sports Technology.

# Global SportsTech Innovation Initiative Ecosystem 2024

## Accelerators, Incubators & Challenges

● North America ● APAC ● Europe ● ROTW

<b>Neom Sport</b> <small>(w GSIC by Microsoft)</small> 	<b>Groundbreakers Challenge</b> <small>(GSIC by Microsoft x Sport Singapore)</small> 	<b>Andora Sports Scaleup Program</b> <small>(w GSIC by Microsoft)</small> 	<b>Le Pack</b> 	<b>Paris&amp;Co   Sport</b> 	<b>Wylab</b> 	<b>WeSportUp</b> 	<b>Chiliz Incubator &amp; Accelerator Program</b> 	<b>SportBoost</b> 	<b>Future of Sport Lab Incubator</b> 
<b>Breakaway Accelerator programme</b> 	<b>Comcast NBC Universal Sports Tech</b> 	<b>Divinc</b> 	<b>Techstars Sports Accelerator Indianapolis</b> 	<b>Plug and Play</b> 					

## Innovation Initiatives - by Sports Orgs

<b>AO StartUps</b> 	<b>RCB Innovation Lab</b> 	<b>SportsTech Belgium</b> 	<b>DIF Innovation Lab</b> 	<b>DFB Akademie</b> 	<b>Barca Innovation Hub</b> 	<b>Euroleague Basketball FanXP</b> 	<b>Real Madrid Next</b> 	<b>Sport Innovation Alliance</b> 	<b>Giants Innovation Hub</b> 
<b>Sevilla FC Innovation Center</b> 	<b>Valencia CF Innovation Hub</b> 	<b>FIFA Innovation Programme</b> 	<b>UEFA Innovation Hub</b> 	<b>Reimagine Football</b> 	<b>Nummer 11</b> 	<b>SportsX (MLSE and AWS)</b> 	<b>NBA Launchpad</b> 	<b>Sacramento Kings Capitalize</b> 	<b>Minnesota Twins Accelerator by Techstars</b> 

## Innovators

### What are the biggest challenges you face related to Innovation?



**Chris Schlosser**  
SVP, EMERGING VENTURES



Our innovation cycles are typically pretty short, we are looking for actionable products/partnerships not long range R&D. While it would be very fun to work several years in the future, we typically are looking at systems that could be deployed in the next 12 months into one of our various properties or leagues.



**Carolina Chiappero**  
INNOVATION MANAGER



The biggest challenge today, after implementing the function, is to put innovation in the right place to have a positive impact on the business at a strategic level and in a fully embedded way.



**Giel Kirkels**  
CAPTAIN INSIGHTS & INNOVATION



We see many cool new sportstech products entering the market for grassroots players, such as performance trackers, smartwatch apps for referees and other digital tools. The challenge is to create a connected data ecosystem, to ensure all relevant data sources will become available for users in one logical place. These products are growing as stand alone features, but it would be great to realize a connected data platform to increase user experience.



**Charles Juba**  
GROUP DIRECTOR OF DIGITAL AND TECHNOLOGY



Managing the adoption of innovation bets in a way that will not self-disrupt the organisation's Operational health is a challenge that organisations like ours will continue to monitor and solve for. There is also the challenge of building a continuous and sustainable pathway to for the innovation initiatives to evolve whilst still delivering outstanding mass participation events at scale and at a quality standard.

# Global SportsTech Innovation Initiative Ecosystem 2024

## Innovation Initiatives - by Others

● North America ● APAC ● Europe ● ROTW


<b>Australian Sports Technology Network</b> MELBOURNE	<b>Aquabloom Sports Technology Group</b> HONG KONG SAR	<b>Telangana Sports Innovation Hub</b> HYDERABAD	<b>SportsTech Tokyo</b> TOKYO	<b>Sports Tech Sandbox</b> PUTRAJAYA	<b>Qatar SportsTech</b> DOHA	<b>Sports Tech Research Network</b> GHENT	<b>SportUp</b> GHENT	<b>Nordic SportsTech</b> COPENHAGEN	<b>Sports Lab Copenhagen</b> COPENHAGEN
<b>Lahti Sports Hub</b> LAHTI	<b>SheSportTech</b> GOPPINGEN	<b>Norwegian Sport Tech</b> OSLO	<b>Startups In The Game</b> WARSAW	<b>SportsTech Ireland</b> LIMERICK	<b>Slovak Sports Innovation Centre</b> BRATISLAVA	<b>Hub23</b> BARCELONA	<b>Indescat</b> BARCELONA	<b>The Venue Barcelona</b> BARCELONA	<b>Sports Innovation Hub</b> GIJÓN
<b>CeltaLab1923</b> VIGO	<b>Health &amp; Sports Technology Initiative</b> BLEKINGE	<b>Sports Tech Research Center</b> OSTERSUND	<b>NTN Innovation Booster</b> LAUSANNE	<b>ThinkSport</b> LAUSANNE	<b>Sports &amp; Vitality Hub</b> BREDa	<b>U-Forward</b> UTRECHT	<b>DAZN X</b> LONDON	<b>Ennovate by Entain</b> LONDON	<b>HYPE Sports Innovation</b> LONDON
<b>London Sports Tech Network</b> LONDON	<b>Sports Loft</b> LONDON	<b>SportTech Hub</b> LONDON	<b>Canal Sports Hub</b> PANAMA CITY	<b>Sports Innovation Texas</b> AUSTIN	<b>Sports Innovation Lab</b> BOSTON	<b>ESPN Edge Innovation Center</b> BRISTOL	<b>HTX Sports Tech</b> HOUSTON	<b>Sports Tech HQ</b> INDIANAPOLIS	<b>Global Sports Venture Studio</b> LOS ANGELES
<b>Women in SportsTech</b> MILL VALLEY	<b>Sports &amp; Fitness Industry Association</b> SILVER SPRING	<b>San Diego Sport Innovators</b> SOLANA BEACH	<b>Arena Hub</b> SAO PAULO	<b>Sporthecca</b> SAO PAULO	<b>Sports CoLab</b> SANTIAGO				

# Innovators

## What types of startups / companies are you looking to partner / work with?



**Marilou McFarlane**  
CEO+FOUNDER



All sizes of businesses in the sports tech or broader sports industry interested in diversifying their talent pipelines and building more inclusive cultures. Our programs enhance recruitment and retention for any size business.



**Federico Smanio**  
CEO



We typically target early stage companies in preseed or seed stage that develop solutions for the sports industry, either in the performance, fan experience or management & organization field. Being the point of reference for sports tech in Italy, we also act as a facilitator for foreign startups at a later stage that want to explore the Italian market. In that case we help them by advising them and giving access to the Italian sports ecosystem.



**Guillermo Marín Díaz-Guardamino**  
INNOVATION SERVICES DIRECTOR




We would like to onboard all kind of startups innovating in sports to our GSIC ecosystem. Smart Stadium, Media, High Performance, Fan Engagement, Sponsorship, Gaming, etc.




**Dr. Cheri L. Bradish**  
FOUNDER/MANAGING DIRECTOR



The FSL Incubator is an entrepreneurial launchpad that brings together sport innovation thought leaders with a deep network of successful Canadian sport properties, industry partners and leading technology and investment experts, with the aim to create value by facilitating meaningful innovation in sport. The Incubator empowers seed-stage startups to achieve product-market fit and assist companies with broader transitions for growth.



**Jenna Kurath**  
VICE PRESIDENT OF STARTUP PARTNERSHIPS



The startups and scaleups in our portfolio are building the future of sports by bringing the technology of tomorrow to the athletes and fans of today. We are looking to work with early-stage companies in the following sports industry categories: media and entertainment, athlete and player performance, fan and player engagement, team and coach success, esports, fantasy sports and betting, venue and event innovation, and the business of sports.


















**Andy Selby**  
HEAD OF STRATEGY

**Sports\_Loft**



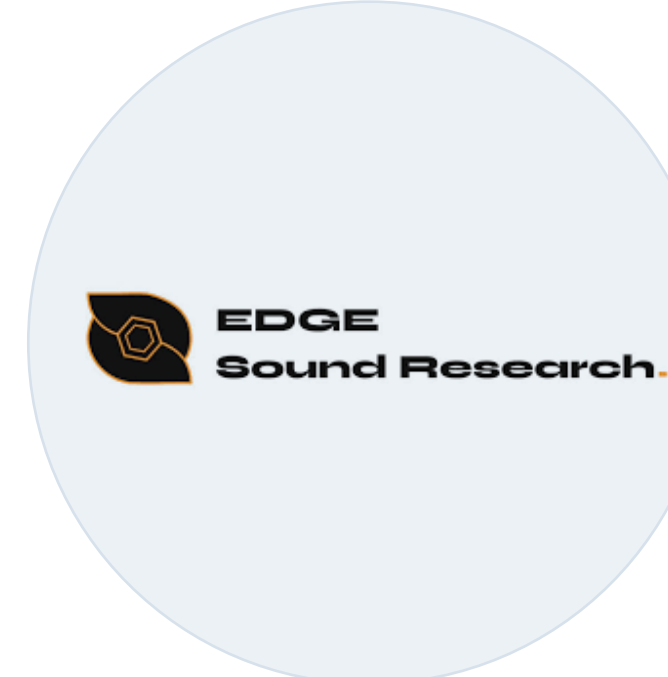

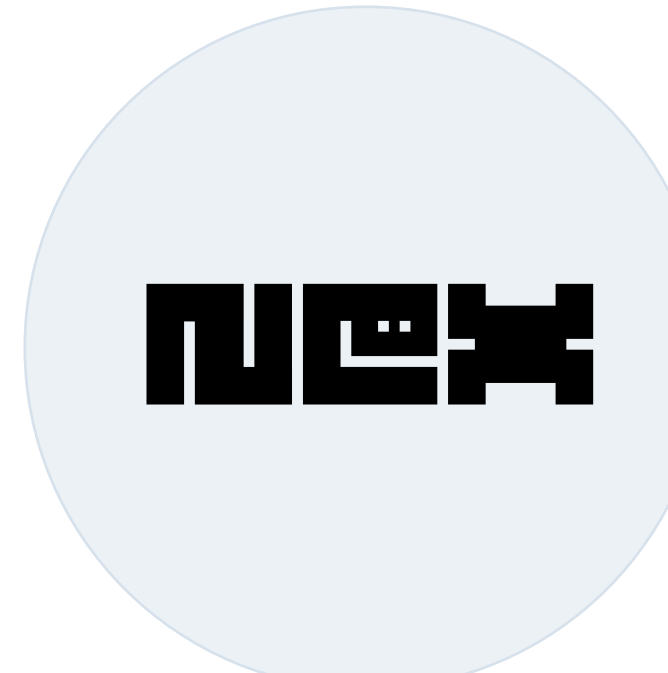





Sports Loft works with leading tech companies serving the sports, media and entertainment industries. We're particularly focused on the commercial side of sports - companies that are driving new revenues for rightsholders and creating new experiences for fans. Personally I'm very interested in companies that sit at the intersection of gaming and sports - whether that's gamifying the experience of being a fan, or creating sports experiences in gaming environments.

# Global SportsTech Startup Selection 2024

We've asked each of the 15 innovators in this report to name one Global SportsTech startup that has impressed them recently. The result: A selection of 15 startups (some were mentioned multiple times) that represent Europe's SportsTech innovation capabilities.

 <p><b>3D Digital Venue</b> Digital replicas of sports venues</p>	 <p><b>Ballogy</b> Skills development &amp; assessment app</p>	 <p><b>BookSeats.com</b> Event ticket &amp; travel package booking</p>	 <p><b>Boomerang</b> 'Lost &amp; found' solution</p>	 <p><b>C15 Studio</b> Premium FAST channels for sports</p>
 <p><b>Coopah</b> AI running coach</p>	 <p><b>Covince</b> Multi platform collaboration, learning, and engagement</p>	 <p><b>Monterosa</b> Powering gamification &amp; interactive Fan Experiences</p>	 <p><b>PlaySight</b> AI powered video solutions for raquet sports</p>	 <p><b>Quidich Innovation Labs</b> Robotic camera tech</p>
 <p><b>Sportwig</b> Digital training platform</p>	 <p><b>Stupa Analytics</b> AI powered video solutions for raquet sports</p>	 <p><b>Your Personal Trainer</b> Personal training and fitness platform</p>	 <p><b>Zatap</b> Digital replicas of physical products</p>	 <p><b>Zoomph</b> Sponsorship performance measurement across digital platforms</p>

## SPORTSTECHX Spotlight: 10 startups to watch

 <p><b>CeleBreak</b> Pick-up Football booking</p>	 <p><b>Camb.ai</b> Voice translation &amp; dubbing AI</p>	 <p><b>Edge Sound Research</b> Interactive audio experiences</p>	 <p><b>Mindfly</b> AI powered BodyCam for sports</p>
 <p><b>Nex</b> Immersive games and experiences</p>	 <p><b>PAM</b> Smart navigation</p>	 <p><b>Sportvot</b> Live streaming for non-elite sports</p>	 <p><b>Supersapiens</b> Metabolic insights</p>
 <p><b>Turf Coach</b> Smart turf management</p>	 <p><b>Respo-Vision</b> Computer Vision based analytics &amp; visualisation</p>		



# Checkout the Global Sportstech Map

Every SportsTech Investor, Accelerator & Initiative. All in one place.

[sportstechx.com/map](https://sportstechx.com/map)







**THAT'S A WRAP**

# Methodology

The data from this report was obtained from reviewing over 7000+ startups and nearly 5,000 funding deals in Global SportsTech. Here are some key things to know about how this analysis was approached. While we always want to be as inclusive as possible, we have applied certain criteria to ensure that all data is representative of current trends.

All companies founded before the year 2000 have been excluded unless otherwise stated, such as Fanatics.

Only deals announced during the period of Jan 1, 2019 - Dec 31, 2023 were considered.

Deals completed in that period for companies that are not currently active have also been included.

As in every year, we expect some amount of reporting lag as not all deals from last year would have been announced.

All deals are reported in USD. For deals not in USD, the average conversion rate for the deal currency to USD in the deal year was utilized.

As far as possible, we have obtained public domain sources for all the deals that we report on. This includes funding announcements made on a variety of media channels.

Esports game publishers, teams and leagues have been excluded as they don't find space in our framework.

In general, eCommerce based solutions have been excluded, as those form part of the Web 1.0. So while there has been innovation in products, the format itself isn't new.

One last thing: As always, our team spends countless hours pouring over interviews and data around startups and funding rounds, but the nature of the beast that we try to tackle is that some will get missed, especially from the last year. However, we are confident that the information we present paints a pretty accurate picture of what is happening overall in the industry and so allows us to draw strong inferences about where it is headed.

# Thank you!

We would like to thank our fantastic team for the work that's gone into this report. Without their initiative, innovation and hard work this wouldn't have been possible. A great team is greater than the sum of its parts. These are the people that make us a great team.



**Vishnu Dixit**  
Research



**Kimberly Fernandez**  
Business Development  
& Communications



**Rohit Laddha**  
Research



**Sinhaar Rodrigues**  
Business  
Development



**Khyati Choudhary**  
Marketing & Communications



**Atiriya Narayan**  
Research

## Imprint

Author: Rohn Malhotra

Company: The Global SportsTech Ecosystem Report is a product of SportsTechX GmbH

Address: Liebigstr. 35, 10247 Berlin, Germany

Contact: [www.sportstechx.com](http://www.sportstechx.com) / [hello@sportstechx.com](mailto:hello@sportstechx.com)

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## Graphic Design

The report was designed by Ryan Hays. Thanks a lot for your continuous support! Check him out at [www.boyintree.com](http://www.boyintree.com)



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