Australian Sports Technologies Network
Powering Sports Innovation

ASTN **SPORTS INNOVATION REPORT**

Fifth Edition 2026

ANALYSIS OF AUSTRALIA'S SPORTSTECH SECTOR IN THE LEAD-UP TO BRISBANE 2032. SHOWCASING INDUSTRY LEADERS SHAPING THE FUTURE OF SPORT ON THE GLOBAL STAGE.

SPORTS INNOVATION REPORT 2026

Australian Sports Technologies Network
Powering Sports Innovation

Insights into Australia's maturing sportstech sector as industry champions drive strong revenue growth

FY2026
Annual sportstech revenue climbed to

$7.11b

16% GROWTH
increased from 10% in FY24 & FY25

Employs 20,604 people

12-16% of the total sports industry

US and Western Europe dominate global sportstech activity

CATEGORY LEADERS DRIVE GROWTH

12% OF COMPANIES DOMINATE

89% total revenue

74% people employed

TOP INSIGHTS

- Major events drive future growth
- Expansion into adjacent industries
- Sophisticated investor interest grows
- Widespread tech adoption
- Early validation shifting overseas

AUSTRALIA'S SPORTSTECH HUBS

38% VIC	26% NSW	23% QLD

Australia's Eastern Seaboard is home to more than 800 sportstech businesses

88% of sportstech businesses + **89%** of total sector revenue

ASTN POWERS EMERGING SPORTSTECH LEADERS

TOTAL PROGRAM IMPACT TO DATE

- **95** Businesses in 17 Accelerator cohorts > A$100m raised
- **215** Startups through 11 Pre-Accelerator cohorts
- **150+** Businesses in trade missions to key sports markets

EMERGING SPORTSTECH THEMES

- Artificial intelligence in sport
- Environmental, social and governance (ESG)
- Active living, fitness and wellness
- Quantum technology, big data, privacy and security
- Virtual sports, esports and gaming
- Women in sportstech
- Sports broadcasting and smart stadium tech
- Sport as an investment class
- Smart tech for paralympics & mobility
- International trade and export

The Australian Sports Technologies Network (ASTN) acknowledges the Victorian Government and the Department of Jobs, Skills, Industry and Regions (DJSIR) in funding this report as part of the ongoing support of the Australian Sports Innovation Centre of Excellence (ASICE). ASTN would also like to recognise key supporting funding partners of this report including the Queensland Government and the Department of Environment, Tourism, Science and Innovation (DETSI), the Department of Sport, Racing, Olympic and Paralympic Games (DSROPG), the Australian Sports Commission (ASC) and the Australian Institute of Sport (AIS), as well as the Australian Trade and Investment Commission (Austrade) and the City of Melbourne.

ASTN acknowledges and pays respect to the Traditional Custodians of Country throughout Australia, and to Elders past, present and emerging. We recognise and celebrate the continuation of the cultural, spiritual and educational practices of Aboriginal and Torres Strait Islander peoples.

FOREWORD

Unlike the fintech sector, the sport sector, along with Australian and multinational corporates, is underutilising Australia's substantial domestic sports innovation capability. Given the scale of Australia's sportstech ecosystem, ASTN is well positioned to help bridge this gap by facilitating collaboration, unlocking innovation opportunities and strengthening engagement across the sector.

The Fifth Edition of the ASTN Sports Innovation Report continues to profile Australia's growing sportstech sector, which now consists of more than 900 businesses generating over A$7 billion in revenue and employing more than 20,000 people. As Australian sportstech businesses ride the wave of global sector growth, domestic sports fandom is also reaching record levels on the Green and Gold Runway to Brisbane 2032.

With attendance and viewership at the Australian Open (AO), Formula 1 Grand Prix, AFL, NBL and NRL continuing to rise, international leagues such as the NFL and NBA are also bringing their major events to Melbourne. More often than not, these sporting events extend far beyond the action on the field of play, transforming sporting competitions from standalone matches into multi-day, immersive cultural experiences that integrate business, technology and entertainment. This festivalisation widens the visitor economy well beyond traditional sport tourism and hospitality, generating opportunities across a diverse range of sectors and experiences. Importantly, this growth in event-led engagement is increasingly accompanied by a shift towards innovation and technology collaboration across the sport ecosystem.

Examples of open innovation in sport, where sporting organisations partner with startups and technology companies to solve challenges and develop new ideas, are AO Startups and ASTN-supported initiatives associated with the NRL Magic Round and AFL Gather Round. Global programs such as UEFA Champions Innovate, FIFA Innovation Challenge, NBA Launchpad, MLS Innovation Lab and the Bundesliga Innovation Summit are leading the way, reflecting a growing global trend in which major sporting organisations use events and festivals as platforms for innovation, entrepreneurship and technology collaboration.

However, in contrast to some of these global initiatives, sporting events in Australia continue to rely on governments to drive innovation activities. Corporate sponsorship rarely extends beyond marketing and branding, and therefore often fails to engage meaningfully with the broader innovation capabilities of the domestic sportstech sector.

As a result, unlike the fintech sector, the sport sector, along with Australian and multinational corporates, is underutilising Australia's substantial domestic sports innovation capability. Given the scale of Australia's sportstech ecosystem, ASTN is well positioned to help bridge this gap by facilitating collaboration, unlocking innovation opportunities and strengthening engagement across the sector.

This reflects a broader shift in global sport, where digital and physical innovation are increasingly coming together, driven by advances in data, connectivity and new technologies. These developments are reshaping how sport is played, experienced, and managed across elite, community, and youth levels.

Artificial intelligence and data-driven tools are accelerating this shift, creating new opportunities across performance, fan engagement and operations, while reinforcing the importance of responsible AI use, consistent with guidance from the Australian Sports Commission (ASC) and the Australian Institute of Sport (AIS).

At ASTN, we play an innovation intermediary role that connects sport organisations, startups and corporates to enable practical innovation outcomes. Our work delivers both short-term strategic impact for partners and longer-term ecosystem development through programs that evolve in response to partner and ecosystem needs.

This is particularly important given that more than one in four sportstech businesses now service adjacent sectors beyond sport.

In response, the ASTN Pre-Accelerator and Accelerator, AO Startups, AIS / ASC 'The Park' and the LuminaX Healthtech Accelerator continue to attract participants across the sportstech technology stack, as well as from adjacent industries.

This reflects a broader shift in how sportstech innovation is being developed and commercialised. The limited engagement by larger corporates and the sport sector in open innovation and collaboration with domestic startups has led to revisions of the ASTN 'Born Global, Thrive Local' Sportstech Startup Playbook. Australia is no longer the sole or primary pathway for validating sportstech startups, as global markets increasingly attract and adopt high-potential innovation. As a result, many Australian sportstech startups are now achieving success internationally before gaining traction domestically.

On the other hand, an increased international connectedness also drives future opportunities for ASTN and its members. In 2025/2026, nearly 50 sportstech businesses participated in ASTN-led or partner-led international delegations and programs across key markets, including Europe, North America, and Asia. This includes trade fairs, export bootcamps, and major industry conferences designed to support global market entry and partnerships.

Key highlights include the international trade fair for sporting goods, outdoor and winter sports (ISPO) in Germany, NRL OzFest in Las Vegas, ASTN's South Australian 'Go Global' delegation to the US Westcoast, the ASTN delegation and 'Australia Hub' exhibition at the PEAK Conference in Las Vegas, and the ASTN Southeast Asia export bootcamp in Singapore.

From an overseas perspective, Australia continues to be viewed as a pioneering exemplar in sportstech. For example, peer organisations including SporTechFr, Sports Tech Norway, the Swiss Innovation Hub, and Colosseum Sport from Israel acknowledge ASTN's role in building a globally connected sportstech ecosystem. Accordingly, we continue to strengthen our ties with international peer organisations like the ASPN Accelerator (Taiwan), GSIC (powered by Microsoft) (Spain & Singapore), SportTechFR (France), Swiss Olympic Innovation Hub (Switzerland) and delegations from Japan, South Korea, India, Ireland, the Netherlands and other European markets.

With support from the state governments of Queensland, South Australia and Victoria, the federal trade diversification initiative by the Australian Trade Commission (Austrade) and collaborations in Western Australia, with the NRL, Australian Sports Commission and the City of Melbourne, our activities connect startups, researchers, sports, government and businesses. This work aims to expand the capacity and capability of the sports industry domestically and increase global technology adoption.

With six years to go until the Olympic and Paralympic Games in Brisbane 2032, Australia has an immediate opportunity to secure its position as a global testing and validation hub for sportstech innovation. By moving decisively now, Australia can leverage Brisbane 2032 to accelerate long-term industry growth and establish a sustainable global competitive advantage in the rapidly expanding sportstech market. However, seizing this opportunity will require stronger collaboration across sport, industry and government to translate Australia's capabilities into global impact.

Dr Martin Schlegel
Executive Chair
Australian Sports Technologies Network (ASTN)

By moving decisively now, Australia can leverage Brisbane 2032 to accelerate long-term industry growth and establish a sustainable global competitive advantage in the rapidly expanding sportstech market.

EXECUTIVE SUMMARY

Australia continues to strengthen its position as one of the world's leading destinations for major sporting events in the lead-up to Brisbane 2032. Investment in world-class facilities, attraction and delivery of outstanding major sports events, combined with almost unrivalled sports fandom, provides a strong foundation for new innovations and procurement opportunities for sport entrepreneurs.

The Fifth Edition of the ASTN Sports Innovation Report reveals a sports innovation and technology sector – now known as 'sportstech' – experiencing strong revenue growth, driven by the success of Australia's Top 115 sportstech companies.

In FY2026, ASTN estimates that the Australian sportstech sector's revenue grew by 16%, reaching A$7.11 billion, compared with 10% growth in FY2025. Total employment reached 20,604, representing growth of approximately 6%.

Australia's sportstech sector now accounts for 12-16% of an estimated A$45 billion Australian sports industry, which employs around 170,000 people.[1]

Despite outstanding revenue and employment growth, established business numbers grew by only 1.8% to 924 businesses in FY2026. This reflects a maturing sector, as shown by business growth plateauing over the past five years.

Australia's Fast-Scaling Sportstech Leaders Drive Sector Growth

ASTN estimates that the Top 115 Australian sportstech companies represent 12% of the sector but generate 89% (A$6.30 billion) of total sector revenue and 74% (15,201) of total employment.

This strong growth is being driven by a portfolio of successful fast-scaling sportstech companies. These can be broadly defined as companies that have either become category leaders in global markets, or companies that have assumed dominant market positions servicing the domestic sports industry.

High profile companies that are category leaders globally include Catapult Sports, VALD, Champion Data, ECAL and etrainu that are servicing professional teams, leagues and federations; and PMY Group, Roller, PAM, Rosterfy and MyVenue that are servicing major events, venues and stadia. Next Level Racing and GTG Network are also category leaders, servicing fans globally through gamification and sports data. Whilst companies including Evolt, Sweat, Kic and Hapana are carving out strong niche positions in a large, but fragmented global fitness and gym market.

Sector revenue is also being driven by growth in domestic sports content and streaming platforms such as Kayo Sports, Stan Sport, Racing.com, Sports Entertainment Network and Betmakers Technology Group. Iconic sports apparel companies like Lorna Jane, Ripcurl and Quiksilver, as well as performance and active leisure brands such as LSKD, 2XU and MAAP are also providing impetus to the sector's growth.

Global Category Champions, Major Sports Events and Fandom to Fuel Australian Sportstech Growth

As the Australian sportstech sector continues to mature and established business growth stabilises, the short-to-medium term outlook remains bright.

The global success of an expanding portfolio of high-growth Australian sportstech companies is expected to further drive revenue and employment growth. The sector is also maturing through consolidation and the emergence of category champions.

Australia's historical strength and credibility in developing technologies for high performance sport is demonstrated by the global success of companies like Catapult Sports, VALD, Champion Data and Vue Motion across the elite sports environments.

Australia continues to strengthen its position as one of the world's leading destinations for major sporting events in the lead-up to Brisbane 2032. Investment in world-class facilities, attraction and delivery of outstanding major sports events, combined with almost unrivalled sports fandom, provides a strong foundation for new innovations and procurement opportunities for sport entrepreneurs. Australia continues to attract world-class sporting events including an NFL regular season game, NBA pre-season exhibition games, EPL and European soccer pre-season games, the Men's and Women's Rugby World Cup and the President's Cup.

Major sports events such as the Australian Open and Formula 1 Australian Grand Prix, alongside Australia's major professional leagues including the Australian Football

1. Estimates for 2026 (A$ 45 billion, 170,000 jobs) are extrapolated from KPMG, The Value of Sport in Australia (March 2020) Report.

League, National Rugby League and National Basketball League, are attracting record crowds as demand for live sports entertainment continues to grow. This sustained growth in engagement is strengthening the foundation for Australia's sportstech and innovation sector to expand and compete globally.

Continuing Signs of a Maturing Sportstech Market

The sportstech sector is continuing to show signs of industry maturity, consistent with trends that have been observed over the past three to four years.

Strengthening market positions of category leaders is a defining characteristic of a maturing industry, alongside increasing market consolidation, particularly across the high-performance sportstech segment. This trend is reinforced by recent acquisitions and the strengthening market positions of leading companies such as Hudl, Teamworks, Catapult Sports and VALD.

The sector's evolving maturity is also evident in the widespread adoption of technology and digital transformation across the sporting landscape, the convergence of technologies from elite to sub-elite and mass participation, and the increasing diffusion of sportstech into adjacent industries beyond sport.

This ongoing maturation of the sector is further reflected in the slowing rate of growth in established business numbers. Total business numbers have grown modestly at 1.2% per annum over the past five years to 924 businesses in FY2026, reflecting 166 business cessations. This moderate growth contrasts with the sector's strong growth phase from 2011 to 2021, when business numbers rose from 270 to 874, representing year-on-year growth of 12.5%.

Sophisticated investors, including investment banks and private equity firms, typically enter sectors as risk declines and markets mature. There has been an unprecedented flow of capital into the global sports industry over the past five years with sophisticated investors now recognising sports as a stand-alone investment 'asset class'. In the past two to three years, major investments have been made worldwide in teams, leagues, media and entertainment businesses, technology startups and dedicated sports investment funds by investment banks, private equity and sovereign funds.

Sportstech's Expanding Reach into Adjacent Industries

ASTN continues to observe that technologies are increasingly being adopted from sports to adjacent industries, as well as from adjacent industries into sport.

ASTN estimates that in FY2026, more than one in four sportstech businesses (26%) service adjacent industries, up from 21% in FY2025. This trend is expected to continue as technology applications further converge.

In health and human performance, these adjacent industry applications include allied health, occupational health and safety and defence. While in the business of sport, technologies can apply to adjacent industries such as events and festivals, media and entertainment, education and finance.

The sports industry has always served as a strong testing ground for new technologies in both human performance applications and events applications (e.g. stadia and venue). Astute founders and executives are now exploring how their technology can be applied into and out of sport to expand into new markets and increase revenue opportunities.

Record Global Transactions Outpace Domestic M&A and Capital Raising

Australian sportstech mergers and acquisitions (M&A) and capital raising activity eased in FY2026 following record levels in FY2025, with 18 significant transactions recorded, compared to 27 in the prior year.

The previous year was highlighted by major transactions including the acquisition of Foxtel Group by DAZN, Quad Lock by Thule Group and KOJO by PMY Group, alongside growth equity capital raisings by sector leaders.

ASTN estimates that in FY2026, more than one in four sportstech businesses (26%) service adjacent industries, up from 21% in FY2025. This trend is expected to continue as technology applications further converge.

A core premise of the ASTN Sportstech Startup Playbook is that Australia provides an incredible validation market for new sports innovation given the sophistication of the Australian sports ecosystem. However, this notion has been increasingly challenged in recent years. Sportstech startups are reporting challenges in engaging with Australian sport organisations and corporates, suggesting that early-stage validation may, in some cases, need to occur offshore.

FY2026 was marked by A$150 million raised by Australian sportstech flagship Catapult Sports, primarily used to acquire German scouting and intelligence platform, IMPECT, for A$139 million.[2] The Australian-listed company also surpassed a A$1 billion valuation for the first time.

Several of Australia's leading sportstech companies continued raising capital in FY2026 to finance technology development and international growth strategies, including Roller (US$50 million), Bodd (A$15 million[3]), Everlab (A$15 million[4]) and Betmakers Technology Group (A$13.7 million[5]). Registration and competition management leader PlayHQ was acquired by US-based Alpine Software Group[6], while fantasy sports and betting technology company PlayUp was acquired by newly formed NextBet.[7]

Globally, 2025 was a landmark year for the sportstech sector with mergers and acquisitions and capital raising activity totalling US$117 billion.[8]

New Sportstech Innovation Programs Support Aussie Sportstech Innovators

Australia's sportstech startup ecosystem continues to be underpinned by long-standing accelerator programs, most notably ASTN's flagship initiatives – the ASTN Accelerator and ASTN-GSIC Pre-Accelerator – which have supported more than 300 founders since 2012. Businesses participating in these programs have attracted more than A$100 million in investment.

Sports corporate engagement is being led by Tennis Australia. Its AO Startups program provides direct access to the Australian Open ecosystem and contributes to the deal pipeline for the newly established US$30 million AO Ventures fund, which made its first investments in February 2026.

The ecosystem continues to mature, with a new wave of sportstech innovation programs emerging across national sporting organisations, reflecting more structured support for early-stage commercialisation and technology adoption across Australian sport. This includes 'The Park' by the Australian Sports Commission, the LuminaX HealthTech Accelerator and the NRL's Magic Round Tech Sprint. These new initiatives are expected to contribute to a more sustainable support framework for Australia's sportstech startup ecosystem.

Sport and Corporate Engagement Challenges Disrupt Startup Playbook

ASTN's 'Born Global, Thrive Local' Sportstech Startup Playbook has become the pathway for many Australian sportstech businesses to successfully validate their solutions locally, expand offshore and attract global investment.[9]

A core premise of the ASTN Sportstech Startup Playbook is that Australia provides an incredible validation market for new sports innovation given the sophistication of the Australian sports ecosystem. However, this notion has been increasingly challenged in recent years. Sportstech startups are reporting challenges in engaging with Australian sport organisations and corporates, suggesting that early-stage validation may, in some cases, need to occur offshore. Only when solutions have been widely adopted by leading sports organisations overseas are local sports interested in procuring these home-grown solutions. Furthermore, unlike leading sportstech markets such as the United States and Europe, Australian sports teams, leagues and federations have been slow to adopt open innovation by engaging with startups and the broader innovation community to test new solutions. This is stifling the acceleration of sports innovation, leading startups to consider other markets for early-stage validation of their solutions.

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Melbourne, Sydney and South-East Queensland Remain the Epicentre of Aussie Sportstech

The Eastern Seaboard population centres of Melbourne (Victoria), Sydney (New South Wales), South-East Queensland (including Brisbane, the Gold Coast and the Sunshine Coast) and Canberra (Australian Capital Territory) remain the epicentre of Australia's sportstech sector. A total of 88% (817 businesses) are based in Victoria, New South Wales, Queensland and the Australian Capital Territory, accounting for more than 93% of the sector's revenue and employment.

Distribution of sportstech businesses is very concentrated, typically within 15-20km of the CBD of these major cities, with very few businesses based in regional or rural areas.

Victoria has been the long-standing national leader, accounting for 38% of businesses and 39% of total sector revenue. Melbourne hosts a significant share of Australia's major sporting events and is home to many of Australia's leading sports federations and professional sports clubs, helping to create a strong innovation ecosystem and concentration of sportstech businesses.

New South Wales continues to rank as the second largest sportstech geography, accounting for 26% of businesses and 32% of total sector revenue.

Over the past three to four years, South-East Queensland has emerged as a key driver of national growth, now representing nearly 23% of businesses (up from 19% in FY2023) and 24% of total sector revenue. This growth has been supported by significant investment by the Queensland Government in sport, technology, and innovation in the lead-up to the 2032 Brisbane Olympic and Paralympic Games. This is contributing to a strengthening sportstech ecosystem in the region.

Based on current investments, policies and trends, ASTN predicts that Queensland's sportstech sector could surpass that of New South Wales in terms of both business numbers and employment by FY2028.

United States and Western Europe Dominate Global Sportstech Activity

ASTN's research team monitors the development of the global sportstech sector on an ongoing basis. Based on the numbers of investors, startup programs and industry clusters and networks, the United States and western Europe are clear regional leaders in the global sportstech sector.

Of particular interest, the United States dominates sportstech investment activity, accounting for 66% of the 210 investors from ASTN's research. A total of 50 (63%) of industry clusters and networks and 64 (51%) of startup programs are based in Europe, with Spain, France, the Netherlands and Switzerland leading the way. As these statistics suggest, the US sportstech sector is very much investor-led whereas the European sector is driven by collaboration and coordination through industry clusters, as well as open innovation and accelerator programs.

Based on current investments, policies and trends, ASTN predicts that Queensland's sportstech sector could surpass that of New South Wales in terms of both business numbers and employment by FY2028.

1. NATIONAL SNAPSHOT

The Australian sportstech and innovation sector generated approximately A$7.11 billion in revenue in FY2026 and consists of 924 businesses employing an estimated 20,604 people. Today, it represents approximately 12-16% of the Australian sports industry which is estimated to be worth around A$45 billion per annum and employing over 170,000 people.

The Australian sportstech and innovation sector generated approximately A$7.11 billion in revenue in FY2026 and consists of 924 businesses employing an estimated 20,604 people. Today, it represents approximately 12-16% of the Australian sports industry which is estimated to be worth around A$45 billion per annum and employing over 170,000 people.

Strong Growth in Revenue and Employment Driven by Australian Sportstech Champions

ASTN estimates that sportstech sector revenue grew by approximately 16% to A$7.11 billion in FY2026, while employment increased by around 6% to 20,604.

This strong growth is being driven by a portfolio of successful high-growth companies – those that have become category leaders in global markets, as well as those that have established dominant market positions in Australia.

This includes leading companies such as;

- Catapult, VALD, Champion Data , ECAL and etrainu that are servicing the professional teams, leagues and federations;
- PMY, Roller, PAM, Rosterfy and MyVenue that are servicing major events, venues and stadiums;
- Evolt, Sweat, KIC and Hapana that are servicing the gyms and fitness market, and;
- Next Level Racing and GTG Network that are servicing sports fans globally through gamification and sports data.

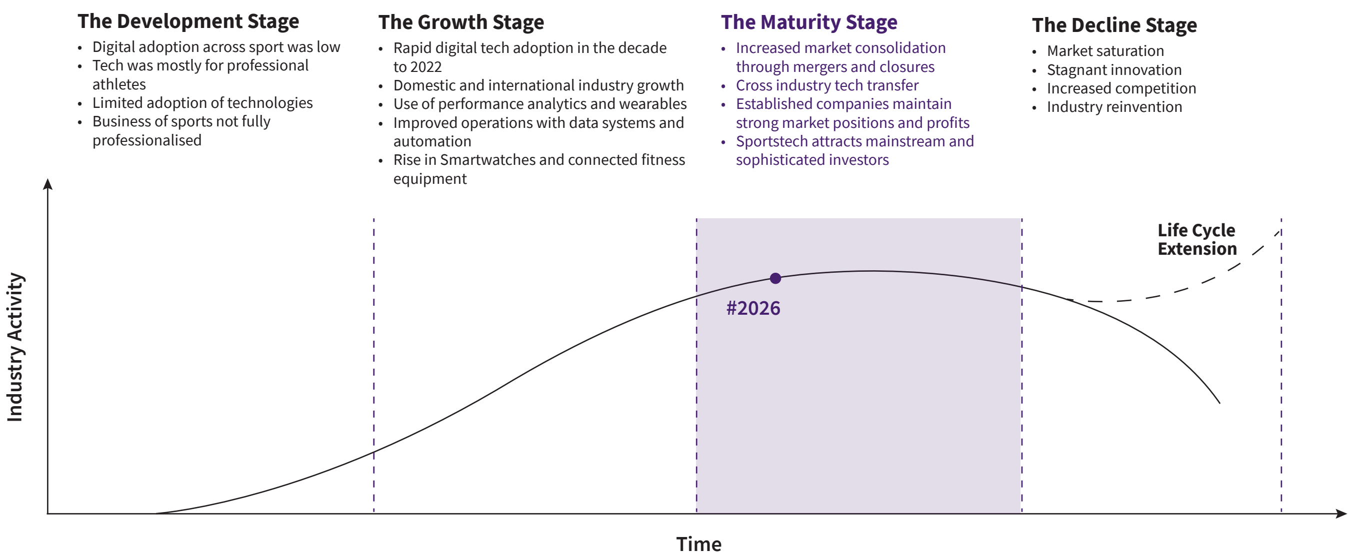
Sector revenue is also being driven by growth in domestic sports content and streaming players such as Kayo Sports, Stan Sport, Racing.com, Sports Entertainment Network and Betmakers. Sports apparel companies like Lorna Jane, Ripcurl and Quiksilver, as well as LSKD, 2XU and MAAP are also providing impetus to the sector's growth.

Continuing Evidence of a Maturing Australian Sportstech Sector

As first highlighted in the 2024 report, the Australian sportstech sector has shown signs of entering a stage of maturity since around 2022, following more than a decade of strong growth. Total business numbers have grown modestly at 1.2% per annum over the past five years to 924 businesses in FY2026. This marks a significant shift from the sector's 'growth phase' between 2011 and 2021, when business numbers rose from 270 to 874, representing a year-on-year increase of 12.5%.

Further evidence that the sector is maturing includes widespread adoption of technologies, greater market consolidation, strong market positions of category leaders, broader diffusion of technologies in adjacent industries, as well as increased investment from sophisticated fund managers.

Evolution of Sportstech: Beyond Growth to Maturity



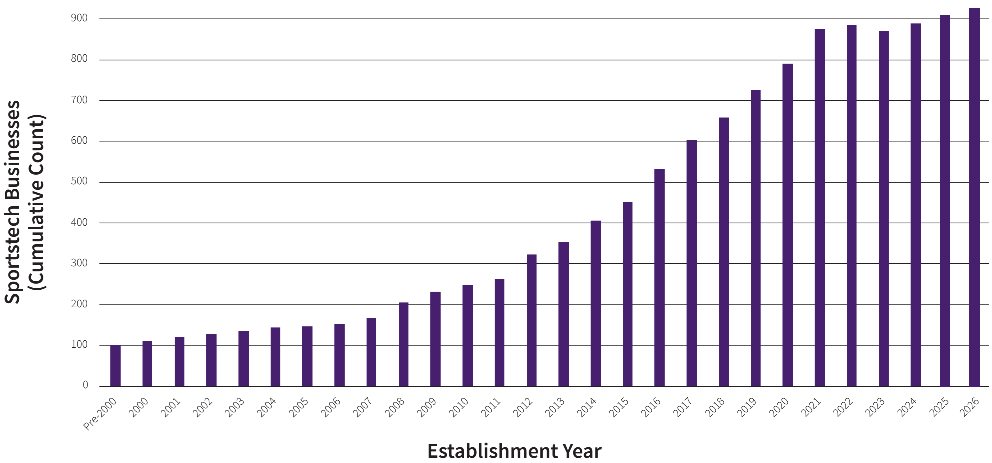
Established Business Growth Plateaus as Business Closures Rise

ASTN's research has identified that 198 businesses ceased operations over the past 12 years, representing approximately 18% of all sportstech businesses established. More than 90% of business exits were the result of closures, with the remaining occurring through mergers and acquisitions.

104 businesses ceased operations in 2022 and 2023 alone. This suggests that many struggling businesses may have pushed through the lean COVID-19 period of 2020 and 2021 when most sports were in lockdown, before facing more challenging market conditions as sports returned to play in 2022. Many startups struggled to generate revenue from a sports industry still operating off restricted budgets and began to close. This also coincided with challenging economic and capital raising environments. As the sportstech sector continues to mature and consolidation increases, it can become more challenging for startups to establish a position in the market, which may have also contributed to higher business closure rates over time.

Encouragingly, business closures have declined over the past three years, with 62 business closures recorded since the start of FY2024. And despite the startup challenges during COVID-19, over 255 new sportstech businesses have launched since the start of FY2021. This reinforces the sector's strong appeal to startups.

Sector Growth – Established Sportstech Businesses (2000-2026)



Victoria remains a clear front runner in terms of sportstech activity, home to over 100 more sportstech businesses than any other state. This has been a long-standing trend, as the state hosts a large proportion of Australia's major sporting events and is home to many of Australia's leading sports federations and professional clubs.

Top 12% of Businesses Account for 89% of Sector Revenue

ASTN estimates that the Top 115 companies (representing 12% of the sector) contribute approximately A$6.30 billion revenue per annum or 89% of total sector revenue. These companies employ around 15,201 people, representing 74% of the total sector employment.

Startups with between one and ten employees represent 62% of the sector (or 571 businesses) but generate just 4% of total sector's revenue.

ASTN estimates that 262 businesses (representing 28% of the sector) employ 11-50 staff, and 91 businesses (representing 10% of the sector) employ 51 or more people.

Victoria Continues to Lead the Sector, with Queensland Emerging as the Growth State

Victoria (VIC) maintains the strongest sportstech presence with 349 companies, representing 37.8% of the sector. Victoria also accounts for 42.9% of the sector's employment (8,826) and 38.6% of revenue (A$2.74 billion).

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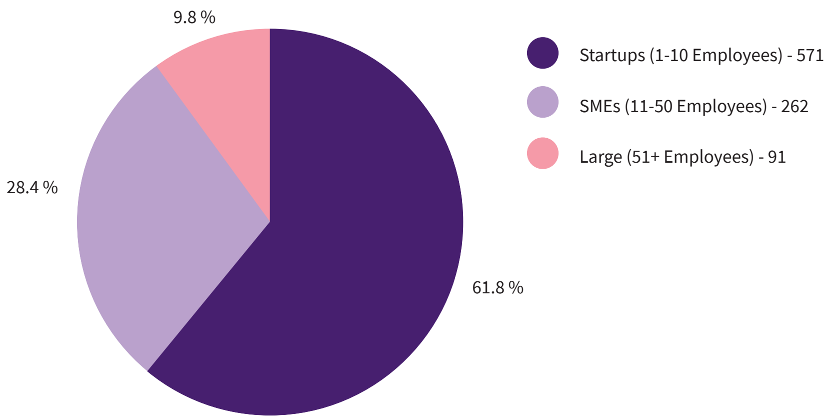
New South Wales (NSW) is home to 242 sportstech businesses (26.2% of the sector). In FY2026, New South Wales employed 5,120 people, representing 24.9% of the sector, and generated annual revenue of A$2.26 billion, representing 31.7% of the sector.

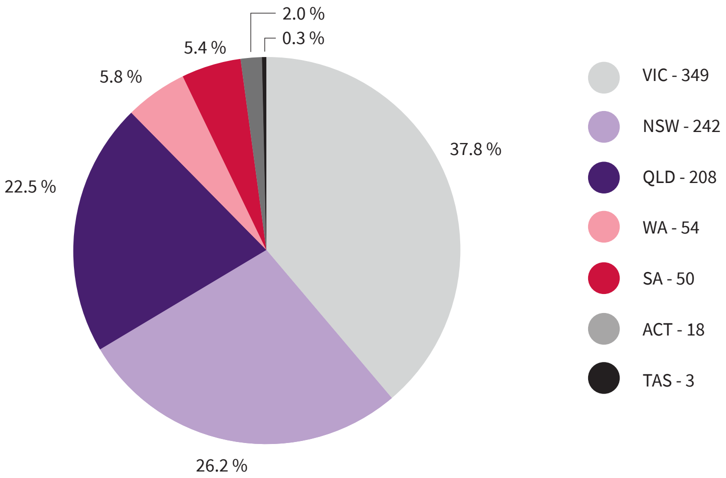
Queensland (QLD) is the fastest growing sportstech state and accounts for 208 businesses, representing 22.5% of the sector. Sportstech businesses headquartered in Queensland employed 5,235 people (25.4% of the sector), slightly more people than businesses from New South Wales, but generated less revenue at A$1.67 billion (23.6% of the total sector).

The remaining states and territories in Australia, including Western Australia (WA), South Australia (SA), Australian Capital Territory (ACT), Tasmania (TAS) and Northern Territory (NT), account for the remaining 13% of businesses and around 7% of employment and revenue.

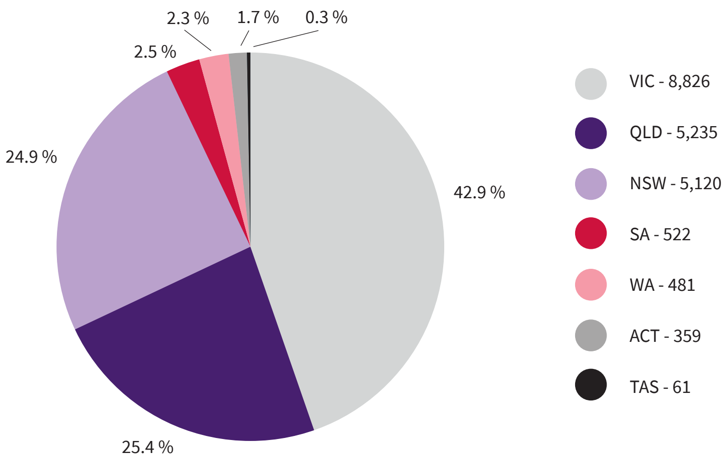
Sportstech Sector by Business Size

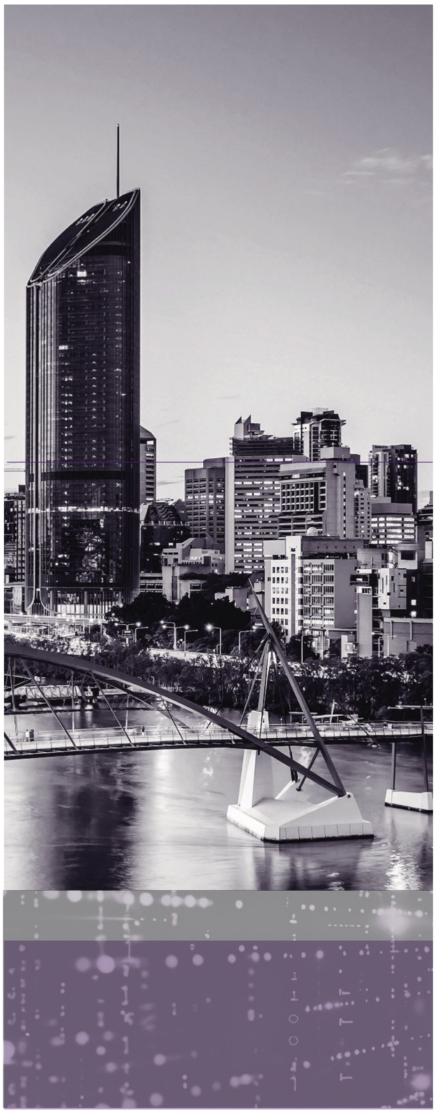


Number of Sportstech Businesses by State



Sportstech Employment by State





Encouraging female entrepreneurship underpins ASTN's startup programs and activities, with an ambitious target of increasing the female founder mix to at least 15% within the next five years.

Founder Profiles Reveal Significant Gap in Gender Diversity

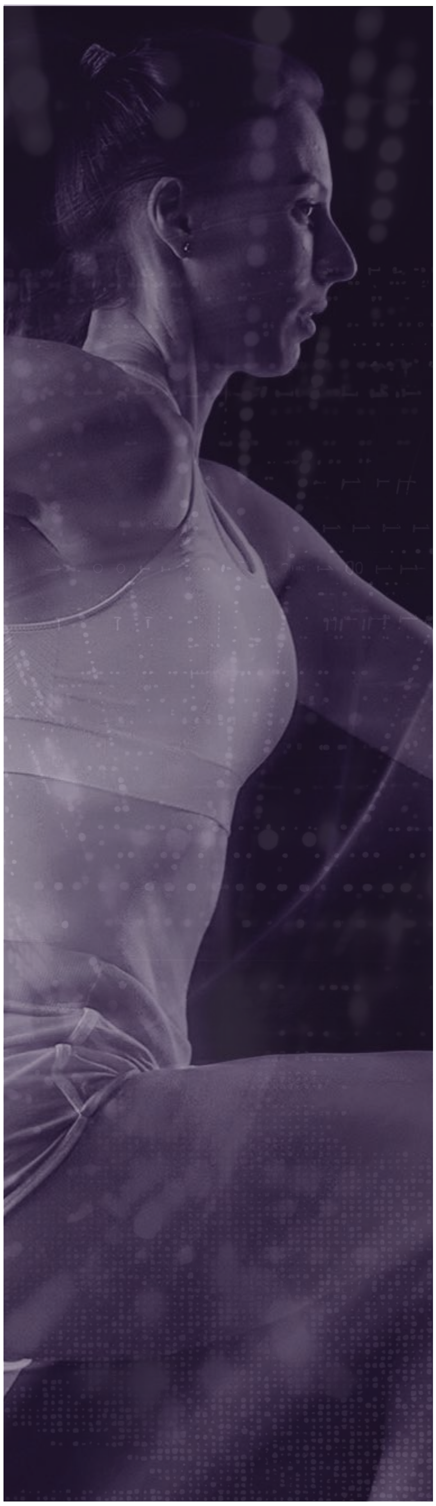
For the second year, ASTN has undertaken a deep dive into the 924 sportstech businesses operating in Australia to gain a better understanding of founder profiles such as professional backgrounds and diversity.

In recent years, there has been greater focus on female participation and investment in sport. However, the representation of women founders in sportstech remains disproportionately low. Women founders currently represent around 24% of all Australian startups by capital raised; however, ASTN research reveals that women founders represent just 8% (76 founders) of the total sportstech sector. This represents a decline from 9% in FY2025.[10]

Encouraging female entrepreneurship underpins ASTN's startup programs and activities, with an ambitious target of increasing the female founder mix to at least 15% within the next five years. ASTN has experienced relatively strong female representation in its startup programs over the past few years, with 19% of founders being female. This includes 42 female founders in the Pre-Accelerator (out of 215 participants) and 16 female founders in the Accelerator (out of 95 participants). While this is significantly higher than the 8% female founder representation across the sector, ongoing support will be required to sustain and build momentum in female founder participation.

ASTN's research also found that sports administrators and practitioners make up 154 founders, representing 17% of the sector. This includes professionals that have come from sports management and executive positions, as well as science-based professions such as sports science and physiotherapy.

The research also identified that 52 founders are elite athletes or former athletes, accounting for 6% of the sector, and only 3% (28 founders) come from an academic or research background.



10. Cut Through Venture. (2026). State of Australian Startup Funding 2025. https://www.cutthrough.com/insights/state-of-australian-startup-funding-2025

2. AUSTRALIA'S TOP 115 COMPANIES ARE DRIVING SECTOR GROWTH

The Top 115 companies leading Australia's sportstech sector generate approximately A$6.30 billion in annual revenue which accounts for 89% of the sector. This marks a significant increase from A$4.84 billion in annual revenue reported in FY2025.

These companies account for around 74% of the total sector's employment, representing approximately 15,201 people in sportstech jobs.

Of these Top 115 companies, a total of 44% (51) provide technologies to the Business of Sport & Entertainment category. Leading sub-categories include companies providing management and operational technologies that service events, teams and leagues, media & broadcasting, as well as esports and fantasy sports.

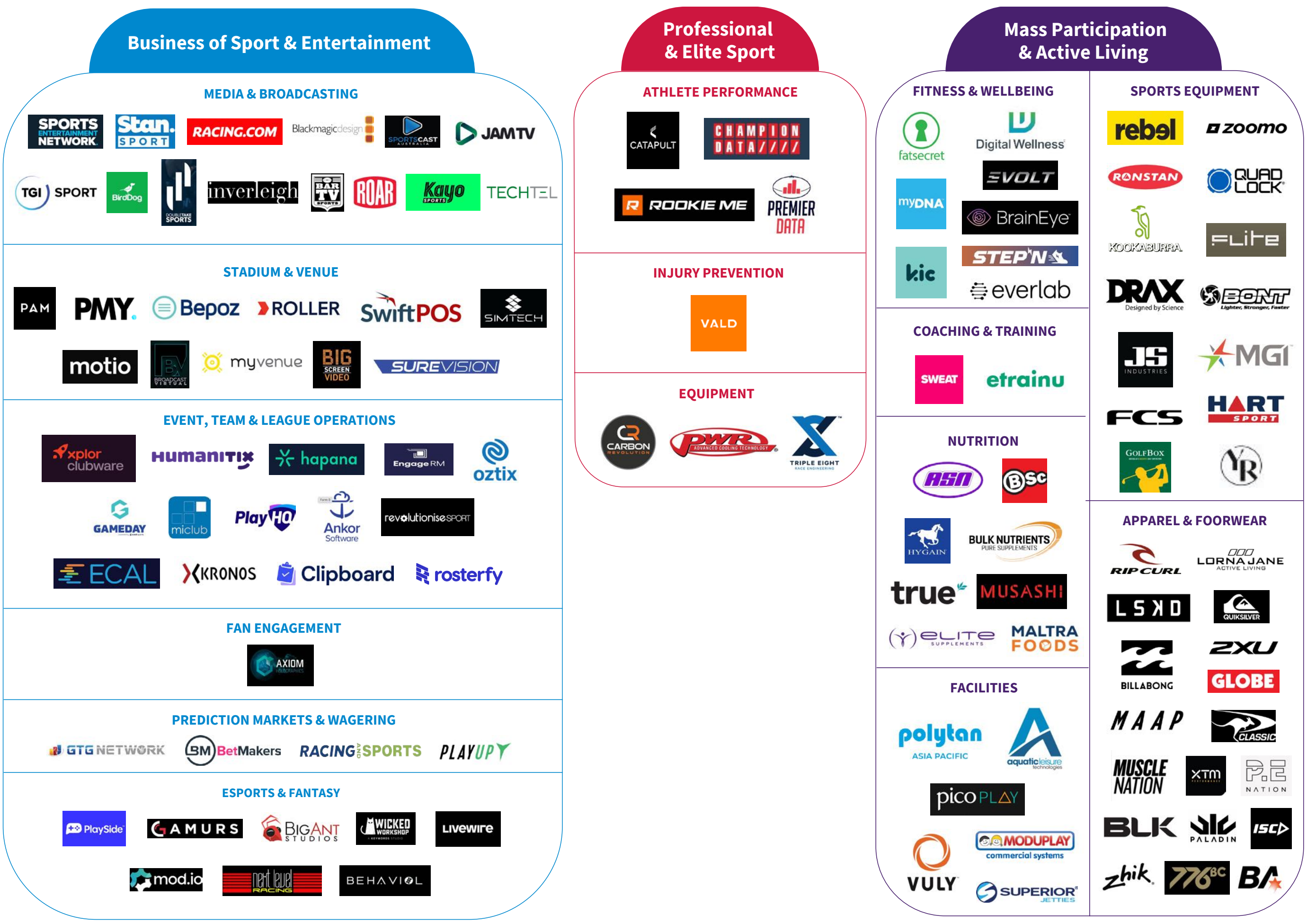
Another important market application category is the Mass Sports Participation & Active Living segment which represents 49% (56) of the Top 115 companies. Typically, these companies are focused on fitness, coaching and training apps, sports equipment, recreational sporting infrastructure or performance apparel.

For high-performance sports, which laid the foundation for Australia's global recognition in sports technology during the early 2000s, only 7% (8) of the Top 115 companies primarily serve the Professional & Elite Sports market.

At least 18 Australian-inspired sportstech companies (in the Top 115) are now owned by international companies but maintain their headquarters or significant operations in Australia.

Overall, the data highlights a mature and increasingly diversified sportstech sector in Australia, led by a cohort of fast-growing companies. Growth is primarily concentrated in business of sport and mass participation applications, with the sector now extending well beyond its high-performance sport foundations.

Australia's Sports Innovation Landscape



Top 115 Sportstech Companies Paving the Way [A]

Business	Website	Description	Headquarters (HQ)
Business of Sport & Entertainment			
Media & Broadcasting			
Sports Entertainment Network	www.sportsentertainmentnetwork.com.au	Sports Media and Content Production	VIC
Stan Sport	www.stan.com.au/sport	Sports Media and Streaming	NSW
Racing.com	www.racing.com	Racing Media and Streaming	VIC
Black Magic Design	www.blackmagicdesign.com	Live Production and Digital Film Production Camera Manufacturing	VIC
Sportscast	www.sportscastaustralia.com.au	Broadcasting Solutions for Grassroots Sports	VIC
JAM TV	www.jamtvaustralia.com.au	Sports Media and Content Production	VIC
TGI Sport Australia	www.tgisport.com.au	End-to-end Content Creation, Production & Technology Solutions	VIC
Bird-Dog	www.bird-dog.tv	Live Streaming Software, Hardware and Cloud Solutions	VIC
Double Take Sports	www.doubletakesports.com.au	Broadcasting Solutions for Grassroots Sports	QLD
Inverleigh	www.inverleigh.com	Premium Sports Content Production and Distribution	VIC
Bar TV Sports	www.bartvsports.com.au	Broadcasting Solutions for Large & Mid-Tier Sports	NSW
The Roar	www.theroar.com.au	Online Sports Content and Opinion Platform	NSW
Kayo Sports	www.kayosports.com.au	Sports Media and Streaming	NSW
TechTel	www.techtel.com.au	Broadcast Systems Integration	NSW
Stadium & Venue			
PMY Group	www.pmygroup.com	Technology Solutions for Stadium, Venues and Sporting Teams	VIC
Roller Software	www.roller.software	Enterprise Software for Leisure and Entertainment Venues	VIC
PAM	www.pam.co	Smart Venue Navigation	NSW
Bepoz	www.bepoz.com.au	SaaS Management and Point-of-Sale Technologies	NSW
SimTech	www.simtechled.com	Digital LED Signage and Displays for Venues	QLD
SwiftPOS	www.swiftpos.com.au	SaaS Management and Point-of-Sale Technologies	QLD
MyVenue	www.myvenue.com	Point-of-Sales Solutions for Stadia and Venue	SA
Broadcast Virtual	www.broadcastvirtual.com	Digital LED Signage and Displays for Venues	NSW
Big Screen Video	www.bigscreenvideo.com.au	Big Screen Technology Solutions and Installations	SA
Motio	www.motio.com.au	Digital Displays and Advertising Platform	NSW
SureVision	www.surevision.com.au	Digital Signage and Content Management	NSW
Management & Event Operations			
Hapana	www.hapana.com	Member Management Solutions for Gym and Fitness Industry	NSW
Humanitix	www.humanitix.com	Event Ticketing Platform	NSW
Rosterfy	www.rosterfy.com	Workforce and Volunteer Management Platform	VIC
Xplor Clubware	www.clubware.com.au	Member Management Solutions for Gym and Fitness Industry	VIC
Oztix	www.oztix.com.au	Event Ticketing Platform	QLD
Engage RM	www.engagerm.com	Intelligent CRM Platforms for Sports Teams, Leauges and Venues	VIC
MiClub	www.miclub.com.au	Golf Club Management Platform	WA
PlayHQ	www.playhq.com	Registration and Competition Management for Grassroots Sport	VIC
Clipboard	www.clipboard.app	School Extracurricular Management System	NSW
Kronos	www.kronosenterprise.com.au	Events Management, Timing and Scoring Systems	VIC
ECAL	www.ecal.com	Sports Calendar Marketing Solutions	VIC

Gameday	www.mygameday.app	Registration and Competition Management for Grassroots Sport	VIC
Ankor Software	www.ankor.io	Management Software for Yachting Charter Industry	VIC
Fan Engagement			
Axiom Holographics	www.axiomholographics.com	Holographic Technologies for Entertainment and Training	QLD
Prediction Markets			
GTG Network	www.gtgnetwork.com	Sports Data Solutons for Wagering, Fantasy and Sports Publishers	VIC
BetMakers Technology Group	www.betmakers.com	Data Analytics Solutions for Wagering Markets	NSW
Racing and Sports	www.racingandsports.com.au	Content, Media and Technology Provider for Horse Racing	ACT
PlayUp	www.playup.com.au	Fantasy Sports and Betting Technology Platform	NSW
E-Sports & Fantasy			
Playside Studios	www.playsidestudios.com	Mobile Games Development	VIC
Big Ant Studios	www.bigant.com	E-Games and Digital Entertainment	VIC
GAMURS Group	www.gamurs.group	E-Games and Digital Entertainment	NSW
LiveWire	www.livewire.group	Gametech and Gaming Marketing	NSW
Wicked Workshop	www.wickedworkshop.com.au	E-Games and Digital Entertainment	VIC
Next Level Racing	www.nextlevelracing.com	Racing, Flight and Motion Simulators	QLD
Mod.io	www.mod.io	Games Mod Development and Distribution Platform	VIC
Behaviol	www.behaviol.com	Web 3.0 Game Development for Sports	NSW

Professional & Elite Sport

Athlete Performance			
Catapult Sport	www.catapultsports.com	Sports Wearables and Analytics For Athlete Performance	VIC
Champion Data	www.championdata.com	Sports Data Capture and Distribution for AFL and Selected Sports	VIC
Premier Data	www.premierdata.com.au	Sports Data Capture and Distribution for Sub-Elite AFL	VIC
Rookie Me	www.rookieme.com	Coach Education & Talent Assessment Platform for AFL	VIC
Injury Prevention			
VALD Performance	www.vald.com	Human Performance Measurement Technologies	QLD
Sports Equipment			
Carbon Revolution	www.carbonev.com	High Performance Carbon Wheels for Motor Sports	VIC
PWR Advanced Cooling Technologies	www.pwr.com.au	High Performance Thermal Management Solutions for Motor Sports	QLD
Triple Eight Race Engineering	www.tripleeight.com.au	Engineering, Design and Manufacturing for Motor Sports	QLD

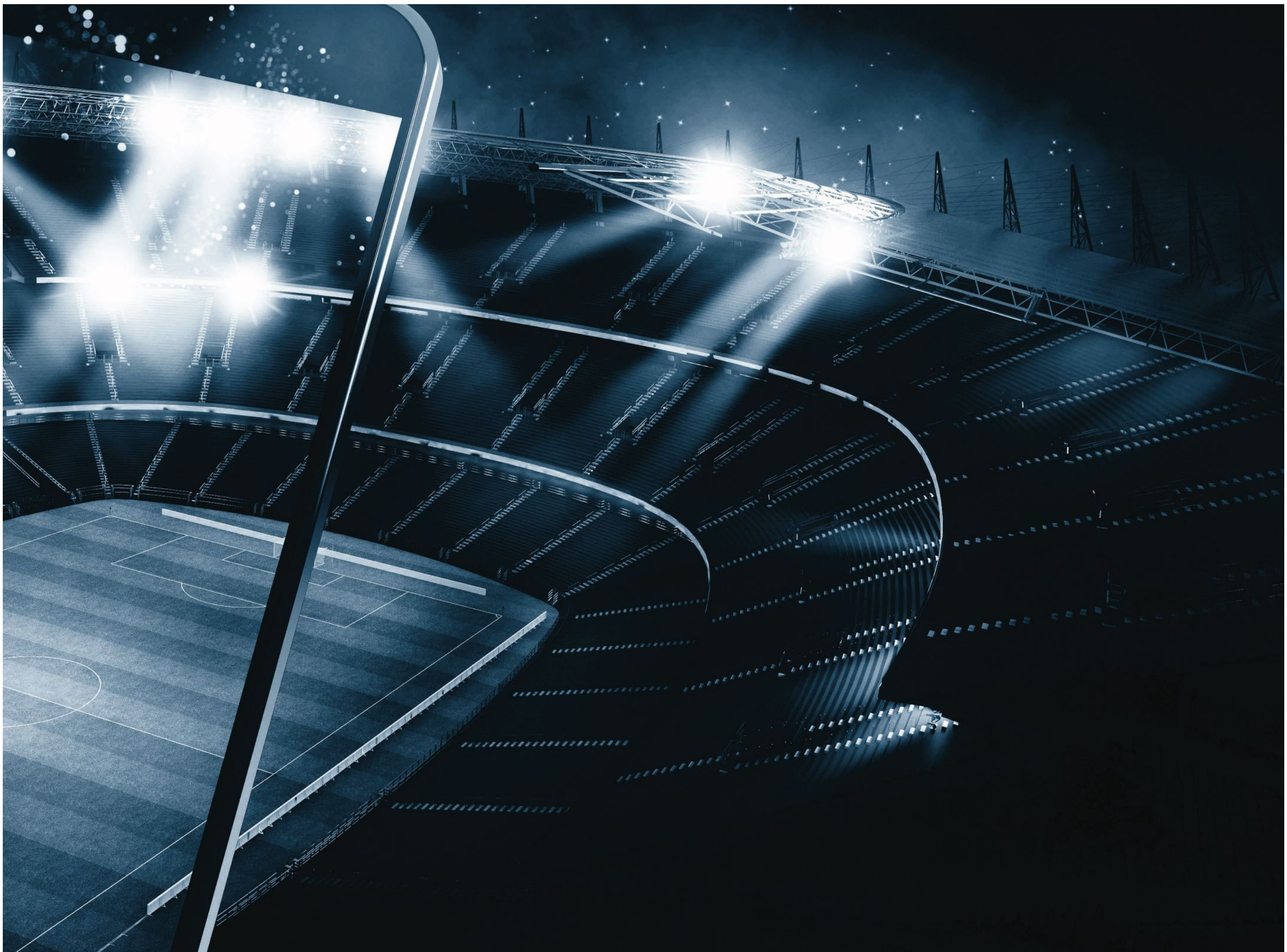
Mass Participation & Active Living

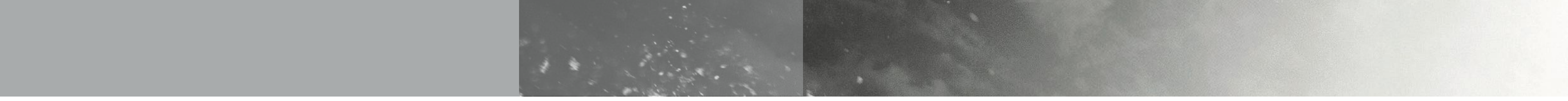
Fitness & Wellbeing			
Kic App	www.kicapp.com	Fitness, Nutrition and Mindfulness App	VIC
Everlab	www.everlab.au	Advanced Health Screening Diagnostics and Longevity Programs	VIC
Evolt 360	www.evolt360.com	Body Composition Scanning Solution for Health and Fitness	QLD
Digital Wellness	www.digitalwellness.com	Nutrition and Weight Management Platform	NSW
MyDNA	www.mydna.life	DNA Diet, Fitness and Lifestyle Testing	VIC
STEPN	www.stepn.com	Move2earn NFT Games on Mobile Devices	SA
Fat Secret	www.fatsecret.com	Food & Nutrition Database and Management	VIC

Braineye	www.braineye.com	Brain Health Monitoring Solution for Concussion Management	VIC
Coaching & Training			
Sweat	www.sweat.com	Digital Fitness and Training App	SA
etrainu	www.etrainu.com	Learning Management Platforms for Multi-Industry including Sports	QLD
Nutrition			
Elite Supplements	www.elitesupps.com.au	Sports Nutrition Manufacture and Distribution	ACT
Musashi	www.musashi.com	Sports Nutrition Manufacture and Distribution	NSW
Maltra Foods	www.maltrafoods.com	Sports Nutrition Contract Manufacturer	VIC
Body Science	www.bodyscience.com.au	Sports Nutrition Manufacture and Distribution	QLD
True Protein	www.trueprotein.com.au	Sports Nutrition Manufacture and Distribution	NSW
Australian Sports Nutrition	www.australiansportsnutrition.com.au	Sports Nutrition Manufacture and Distribution	QLD
Bulk Nutrients	www.bulknutrients.com.au	Sports Nutrition Manufacture and Distribution	TAS
Hygain	www.hygain.com.au	Equine Nutrition Manufacture and Distribution	VIC
Surfaces & Facilities			
Pico Play	www.pico-play.com	Design, Development and Construction of Themed Attractions	QLD
Vuly	www.vulyplay.com	Outdoor Equipment for Kids (Trampolines and Swing Sets)	QLD
Aquatic Leisure Technologies	www.aqualeisure.com.au	Swimming Pool Manufacture	WA
ModuPlay	www.moduplay.com.au	Fitness, Recreational and Playground Equipment Design and Manufacture	NSW
Polytan Asia Pacific	www.polytan.com.au	Design, Manufacture and Construction of Sports Surfaces	VIC
Superior Jetties	www.superiorjetties.com	Custom Floatation Devices	QLD
Sports Equipment			
Rebel Sport	www.rebelsport.com.au	Sports Ecommerce Marketplace	NSW
Zoomo	www.ridezoomo.com	E-Bike Design and Manufacture	NSW
Quad Lock	www.quadlockcase.com.au	Smart Phone Mounting for Active Lifestyles	VIC
Ronstan	www.ronstan.com.au	Sailboat Hardware	VIC
Bont Skates	www.bont.com	Roller Skates	NSW
MGI Golf	www.mgigolf.com	Electric Golf Buggies	VIC
Kookaburra Sport	www.kookaburra.biz	Cricket, Hockey and Football Equipment	VIC
Your Reformer	www.yourreformer.com.au	Pilates Reformers	VIC
Fliteboard	www.fliteboard.com	Electric-Powered Hydrofoil	NSW
FCS	www.surffcs.com.au	Surfboard Fins, Traction Pads and Leashes	NSW
JS Industries	www.jsindustries.com	Surfboards Manufacture	NSW
Drax Fitness	www.draxfitness.com.au	Design and Manufacturer of Strength and Conditioning Equipment	QLD
GolfBox	www.golfbox.com.au	Golf Ecommerce Marketplace	WA
Hart Sport	www.hartsport.com.au	Fitness and Active Play Equipment	QLD
Apparel & Footwear			
Lorna Jane	www.lornajane.com.au/	Womens Activewear and Apparel	QLD
Ripcurl	www.ripcurl.com	Wetsuits, Lifestyle Apparel and Surfboards	VIC
Quiksilver	www.quiksilver.com.au/	Wetsuits, Lifestyle Apparel and Surfboards	QLD
LSKD	www.lskd.co/	Activewear and Apparel	QLD
2XU	www.2xu.com/	Compression, Workout and Fitness Apparel	VIC
MAAP	www.maap.cc	Cycling Apparel Manufacture	VIC
Billabong	www.billabong.com.au/	Wetsuits, Lifestyle Apparel and Surfboards	QLD

Globe International	www.globecorporate.com	Skateboard Apparel, Footwear and Skateboards	VIC
Belgravia Apparel	www.belgraviaapparel.com	Sportswear for Elite and Community Sports	VIC
Muscle Nation	www.musclenation.org	Activewear and Apparel	QLD
ISC Sport	www.iscsport.com	Performance Apparel	NSW
BLK Sport	www.blksport.com	Performance Apparel	QLD
P.E Nation	www.pe-nation.com/	Womens Activewear and Apparel	NSW
Zhik	www.zhik.com	Water Sports Apparel	NSW
XTM Australia	www.xtm.com.au	Snow Apparel and Accessories	VIC
Classic Sportswear	www.classicsports.com.au	Team Performance Apparel	NSW
Paladin Sport	www.paladin.sport	Team Performance Apparel	NSW
776BC	www.776bc.com.au	Performance Apparel	VIC

Note A: If your business is not on this list and you think it should be please let us know. Typically, a minimum of 35+ staff is a benchmark for inclusion. The list does not include wagering and betting companies or sports companies involved in digital, architectural, engineering, product design, leisure, planning and strategic advice.





3. UNDERSTANDING AUSTRALIA'S SPORTSTECH ECOSYSTEM

ASTN has continued to update its proprietary database of 924 Australian sportstech businesses that provide the foundation of this census. ASTN has committed significant resources to understanding what the Australian sportstech sector looks like in terms of its geographic distribution, the sports markets and segments it serves, and the technology platform underpinning the solutions businesses are building.

As part of the detailed analysis of the sportstech sector, ASTN has developed a comprehensive categorisation framework which is utilised to identify each sports technology business as part of this census.

Market Applications

The "Market Application" refers to the sport market segment to which a sports technology business provides its solution. There are three Market Application categories, also referred to as "verticals", along with 33 sub-categories.

i. **Business of Sport & Entertainment (9 sub-categories)**

ii. **Elite Sport (13 sub-categories)**

iii. **Mass Participation & Active Living (11 sub-categories)**

The majority of businesses (approximately 504 or 55%) develop technologies that service the Mass Participation & Active Living market. This includes technologies developed for fitness, wellbeing, training and coaching, sporting and recreational facilities and infrastructure, as well as sports nutrition, sports equipment, apparel and footwear innovations.

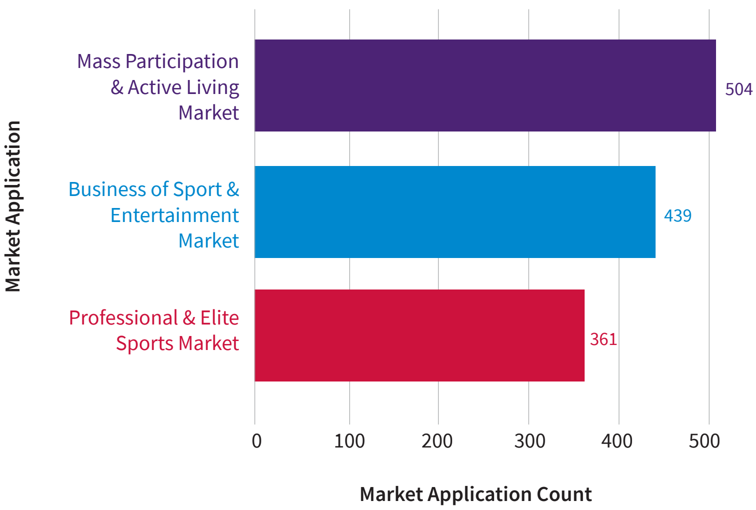
Approximately half (48% or 439) of businesses develop technologies that service the Business of Sport & Entertainment market. This includes technologies developed across media and broadcasting, stadia and venues, league, team and event operations, fan engagement, predictive markets and wagering, as well as esports and fantasy sports.

Around 39% (361) of businesses develop technologies that service the Professional & Elite Sport market. This includes technologies developed for measuring athlete performance, strength and conditioning and injury prevention, sports nutrition, specialised sports equipment, as well as apparel and footwear innovations used by professional athletes and teams.

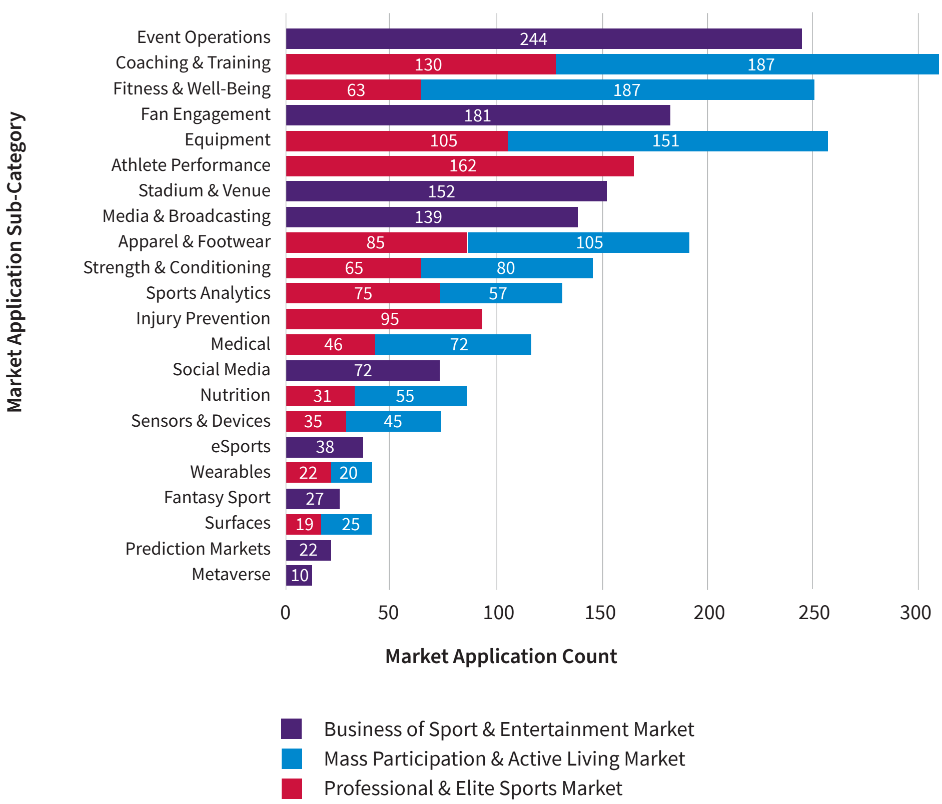
There is an increasing overlap of application of sports technologies across the Mass Participation & Active Living and Professional & Elite Sport markets.

This breakdown of categories highlights the sector's diverse focus areas and emphasises the role of technology and innovation in supporting broader community engagement in sport and active lifestyles.

Market Applications – Number of Businesses by Category [A]



Market Applications – Number of Businesses by Sub-Category



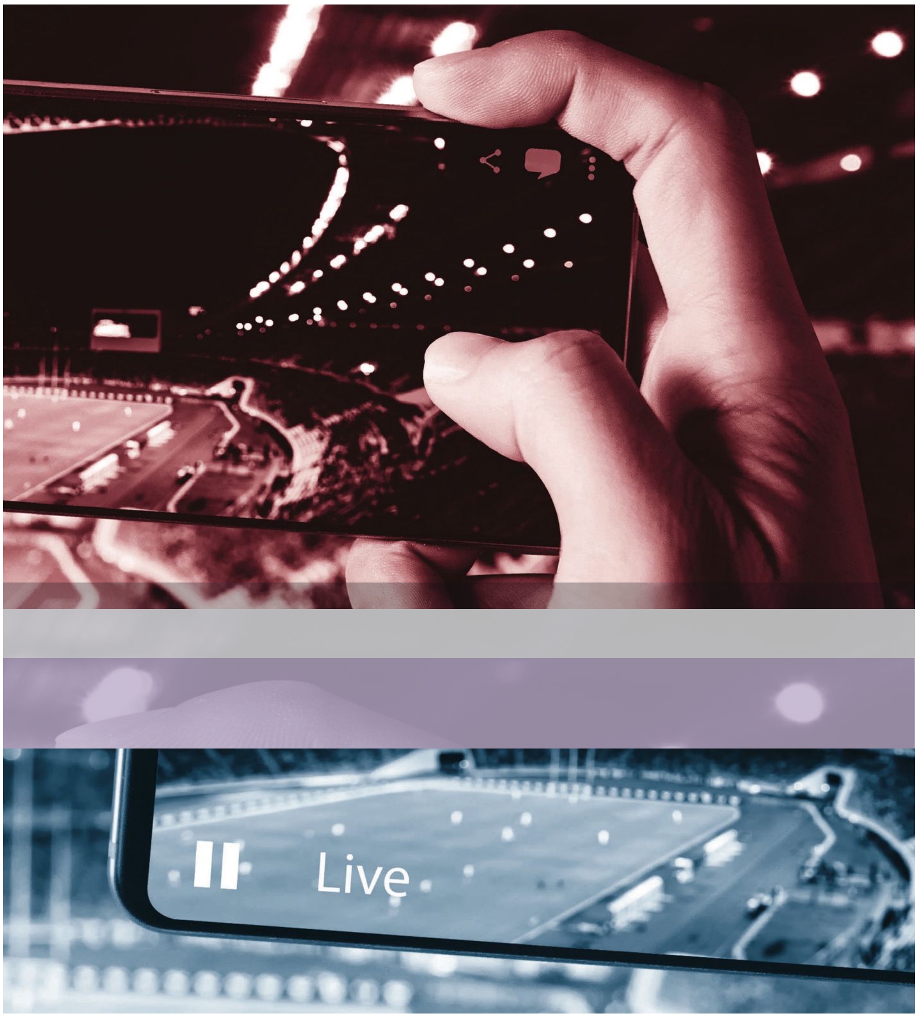
"ASTN's market application and technology stack framework is an excellent fit for Switzerland as it captures the sports technology market more holistically than other comparable approaches."

Mike Kurt, Swiss Olympic Innovation Hub

A. Note: Each sportstech business may be assigned to multiple categories and sub-categories dependent on the sports market(s) that the business services and the technology platform(s) that they are built on. Therefore, the numbers in the tables may add to more than 100% of the sector.

Top 10 Market Application Sub-Categories

Number of Businesses	% of Total Businesses	Market Category	Market Sub-Category
244	26.4%	Business of Sport & Entertainment	Event Operations (inc Events, Teams & Leagues)
187	20.2%	Mass Participation & Active Living	Coaching & Training
187	20.2%	Mass Participation & Active Living	Fitness & Well-Being
181	19.6%	Business of Sport & Entertainment	Fan Engagement
162	17.5%	Professional & Elite Sports	Athlete Performance
152	16.5%	Business of Sport & Entertainment	Stadium & Venue
151	16.3%	Mass Participation & Active Living	Equipment
139	15.0%	Business of Sport & Entertainment	Media & Broadcasting
130	14.1%	Professional & Elite Sports	Coaching & Training
105	11.4%	Professional & Elite Sports	Equipment
105	11.4%	Mass Participation & Active Living	Apparel & Footwear



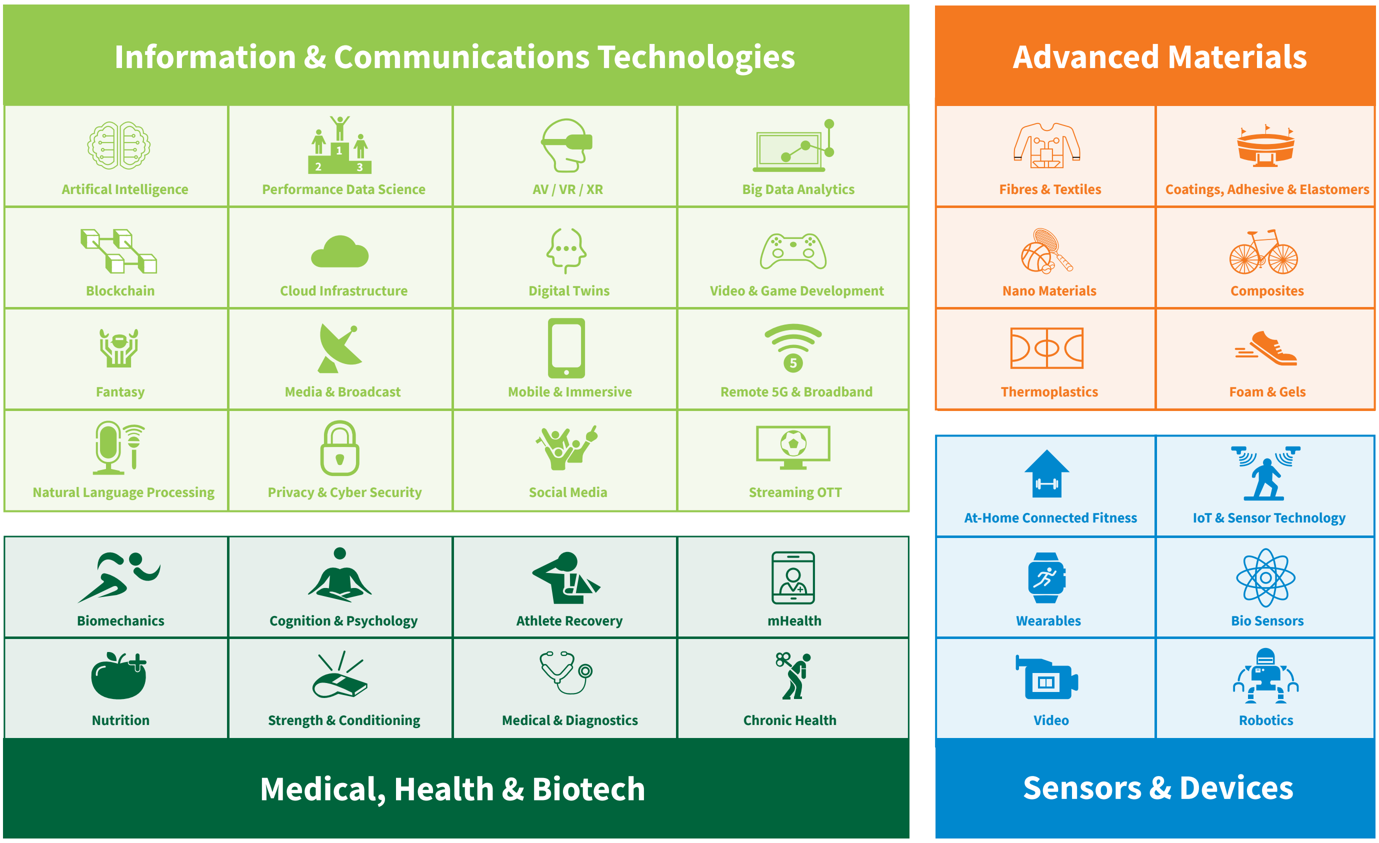
When aggregating and analysing this data, some of the key observations from the Market Applications research on the sector include:

- 32.0% (295) of businesses offer fitness, wellbeing, coaching and training applications for the Mass Participation & Active Living market.
- 29.5% (273) of businesses have content driven applications such as broadcasting, media, fan engagement and social media applications within the Business of Sport & Entertainment market.
- 28.9% (267) of businesses are developed to support operations and management for stadiums, venues, facilities, leagues, teams or events within the Business of Sport & Entertainment market.
- 23.8% (211) of technologies are sports equipment and apparel innovations for the Mass Participation & Active Living market.

Technology Stack Categorisation

Technology Stack refers to the types of technologies utilised to build a proprietary product or solution by a sportstech business. There are four Technology Stack categories (‘classifications’), supported by 36 sub-categories.

i. Information & Communications Technologies (16 sub-categories)
ii. Advanced Materials (6 sub-categories)
iii. Medical, Health & Biotech (8 sub-categories)
iv. Sensors & Devices (6 sub-categories)



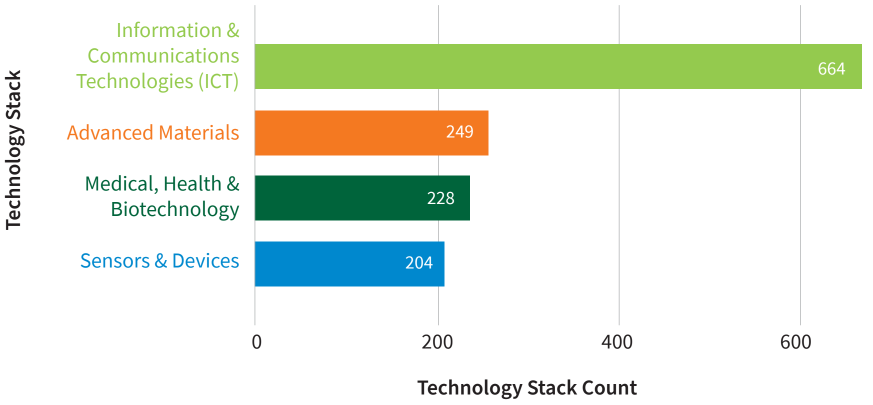
Based on ASTN’s research, approximately 72% (664) of businesses develop technologies using Information & Communications Technologies (ICT) such as digital, communications, cloud, software and IT hardware typically associated with creation, management and distribution of sports video, data and content.

This was followed by Advanced Materials, where 27% of businesses (249) are involved in the manufacture of sports equipment, apparel, footwear and any other tangible sports products. Advances in the development and use of composites, textiles and fibres typically improve the performance of the sports product and equipment.

25% of businesses (228) develop solutions related to Medical, Health and Biotechnology, typically related to measuring, assessing and improving physical, cognitive or well-being of elite and amateur athletes.

Approximately 22% of businesses (204) have developed solutions related to Sensors and Devices. This category relates to both wearable and non-wearable devices (including camera hardware) that captures data for the purposes of monitoring, assessing and improving the performance of elite athletes, amateur athletes and fitness enthusiasts.

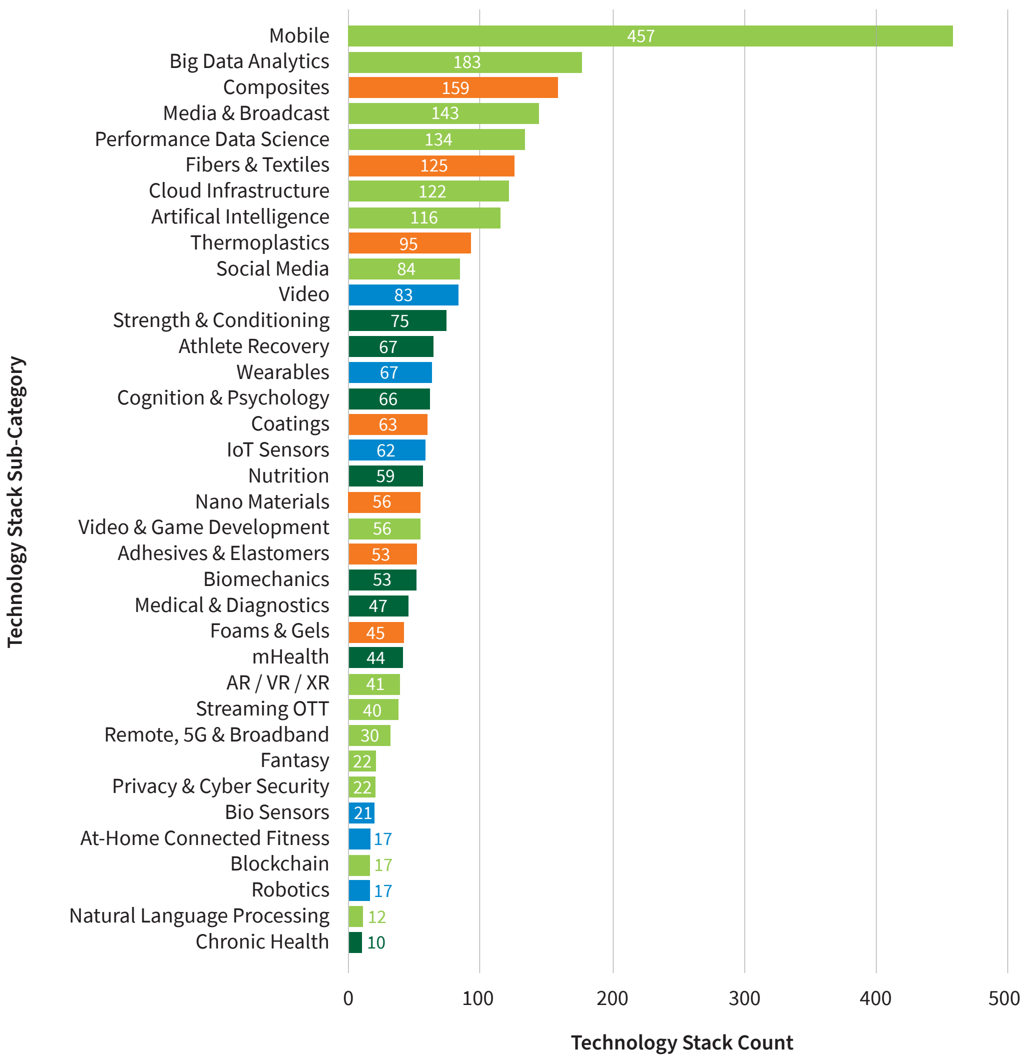
Technology Stack – Number of Businesses by Category [B]



When aggregating and analysing this data, some of the key observations from the Technology Stack research on the sector include:

- Nearly half (49%) of all sports technologies are developed with a mobile-based application.
- Over a quarter (28%) of businesses are involved in big data analytics including performance data science.
- Over a quarter (27%) of all sports technologies are physical product developments using composites, fibres or textiles.
- Nearly a quarter (23%) are considered deep and emerging technology developments involving artificial intelligence, wearables, sensors, blockchain and virtual reality or augmented reality.

Technology Stack – Number of Businesses by Sub-Category



Information & Communications Technologies (ICT)
Advanced Materials
Medical, Health & Biotechnology
Sensors & Devices

B. Note: Each sportstech business may be assigned to multiple categories and sub-categories dependent on the sports market(s) that the business services and the technology platform(s) that they are built on. Therefore, the numbers in the tables may add to more than 100% of the sector.

Sports Applications

This is the second year that ASTN has conducted analysis on the Sports Applications of Australian sportstech businesses to better understand how technologies are being deployed across sport.

The Australian Sports Commission (ASC), the Australian Government agency responsible for supporting and investing in sport at all levels, conducts regular national sports and physical activity participation surveys commonly known as AusPlay. For the purpose of this sector analysis, ASTN has aligned its Sports Applications with the AusPlay categories (October 2021).[11]

AusPlay identified 132 sports and physical activities, of which ASTN has selected 64 relevant activities in its Sports Applications categorisation.

Sports Applications are assigned to each Australian sports technology business identified in ASTN's database. Sports Applications refer to the sports in which the technology applies to, and multiple sports applications may be selected for the purposes of this categorisation.

Three additional activities have been added beyond the AusPlay list, namely 'Multi-Sport', 'Multi-Industry' and 'ESports'.

- 'Multi-Sport' is selected when the technology or product may be used across multiple codes of sports (e.g. footwear and apparel and stadium, venue and operations technologies).
- 'Multi-Industry' is selected if the technology or product can also be used in an adjacent industry outside of sport (e.g. allied health, defence, events, hospitality, education, media and finance).
- 'Esports' is selected for relevant gaming technologies.

Where a technology or product is clearly used in a single sport, that specific sport is selected as a Sports Application. However, 'Multi-Sport' may also be selected if the technology solution or product can have widespread use across the sports industry.

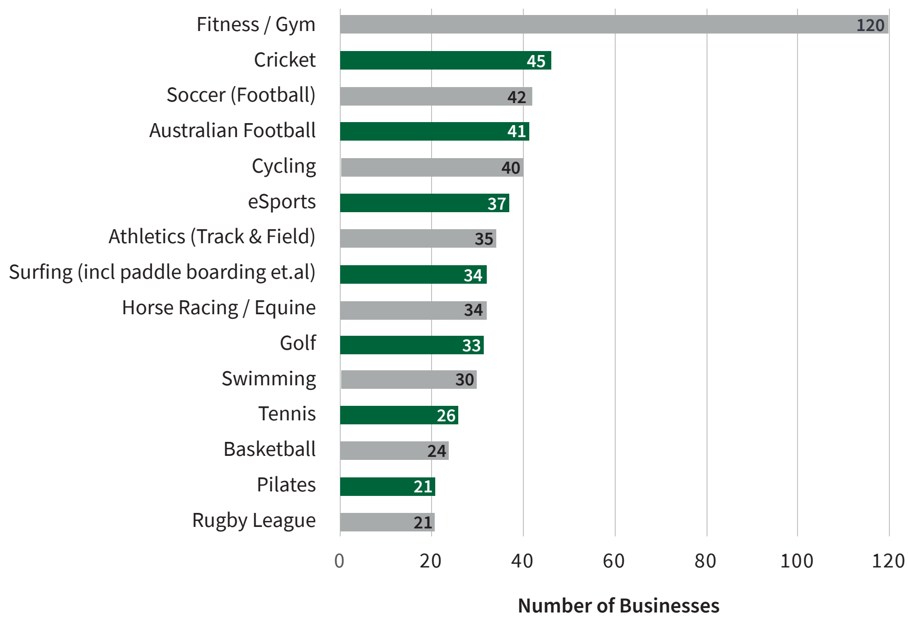
Gym and Fitness Dominate Sports Applications as Adjacent Industry Applications of Sportstech Increase

ASTN's research has uncovered the following highlights relating to the Sports Applications of the 924 Australian sports technologies businesses;

- Over two-thirds (67% or 621) of businesses deliver a 'multi-sport' solution. This relates to technologies and products like sports apparel and footwear as well as stadium, events, broadcasting and media technologies that has widespread usage and may not service a specific sport.
- More than one quarter (26% or 239) of businesses have developed solutions that can be used in adjacent industries beyond sports applications.
- 13% of businesses (120) develop solutions for fitness, health and gyms – the most common sports application among Australian sportstech startups.
- Cricket, soccer (football), Australian football and cycling are other key sports that Australian sportstech businesses develop solutions for.

Over two-thirds (67% or 621) of businesses deliver a 'multi-sport' solution. This relates to technologies and products like sports apparel and footwear as well as stadium, events, broadcasting and media technologies that has widespread usage and may not service a specific sport.

Top 15 Sports Applications



11. Australian Sports Commission. (n.d.). AusPlay results. Clearinghouse for Sport. https://www.ausport.gov.au/clearinghouse/research/ausplay/results 2021)

4. AUSTRALIAN SPORTSTECH VENTURE CAPITAL

In FY2026, Australia recorded 18 significant transactions, down from 27 in FY2025, reflecting a return to more typical levels of domestic deal activity following the record year prior.

Record Global Transactions Outpace Domestic Mergers and Acquisitions and Capital Raising

Australian mergers and acquisitions (M&A) and capital raising activity declined in FY2026 from its FY2025 peak, despite record sportstech transaction activity globally. In FY2026, Australia recorded 18 significant transactions, down from 27 in FY2025, reflecting a return to more typical levels of domestic deal activity following the record year prior. Weaker domestic M&A and capital raising activity contrasts with continued strength in global sportstech transactions.

Mergers and Acquisitions

There were only nine major mergers and acquisitions in the Australian sportstech sector in FY2026 compared to 15 in FY2025. The previous year was marked by several major transactions including DAZN's acquisition of Foxtel Group, Thule Group's purchase of Quad Lock and PMY Group integrating KOJO into its operations.

Australia's flagship high performance sportstech company Catapult Sports was the most active organisation in FY2026, completing the acquisition of German scouting and intelligence platform, IMPECT, for A$139 million, as well as US-based weight room performance tech company Perch for A$28 million.[12]

During FY2026 registration and competition management leader, PlayHQ, was acquired by US-based Alpine Software Group[13], while fantasy sports and betting technology company PlayUp was acquired by newly formed NextBet.

After the DAZN acquisition of Foxtel Group in FY2025, there was another major change in the sports streaming and content ownership landscape with Optus Sport ceasing operations, and broadcasting rights of the Premier League and FA Cup in Australia assigned to Stan Sport.

Capital Raisings and Investments

There were only nine major capital raisings in the Australian sportstech sector in FY2026 compared to 12 in FY2025. Several of Australia's leading sportstech companies raised capital in FY2026 to finance technology developments and international growth strategies. This included Roller (US$50 million), Bodd (A$15 million), Everlab (A$15 million) and Betmakers Technology Group (A$13.7 million).

FY2026 was marked by Catapult Sports raising A$150 million, which was primarily used to acquire German scouting and intelligence platform, IMPECT, for A$139 million[14]. The Australian-listed company also surpassed a A$1 billion valuation for the first time during the year.

12. Catapult buys MIT spinout Perch for $28m, Capital Brief, June 2025, https://www.capitalbrief.com/briefing/catapult-buys-mit-spinout-perch-for-28m c8620913-8fb3-40cd-a443-b61ef6e31dd0/
13. Ausleisure. (2025, December). Alpine Software Group acquires PlayHQ. https://www.ausleisure.com.au/news/alpine-software-group-to-acquire-playhq-in major-cross-border-sports-tech-transaction
14. Business News Australia. (2025, October). Catapult Sports raises $150m to fund acquisition of German soccer intelligence platform IMPECT. https://www.businessnewsaustralia.com/articles/catapult-sports-capital-raising-acquisition-impect.html

Australian M&A Activity (2025-2026)

Date	Company	Description	Transaction Activity	Type of M&A	Amount
March 2026	Xplor Clubware and ClubEssentials Holdings	Member management solutions for gym and fitness industry	Integration of ClubEssentials (Australia) into the Xplor Technologies Fitness & Leisure verticial	Merger	Undisclosed
February 2026	PlayUp	Fantasy sports and betting technology platform	Newly formed betting platform NextBet acquires PlayUp as part of Australian mergers and acquisition plan	Acquisition	Undisclosed
January 2026	Clipboard	School extracurricular management system	School management and communications platform Compass Education (Australia) acquires Clipboard to integrate into its existing business	Acquisition	Undisclosed
December 2025	PlayHQ	Registration and competition management for grassroots sport	Alpine Software Group (USA), a portfolio of vertical SaaS businesses, acquires leading Australian registration and competition management platform	Acquisition	Undisclosed
October 2025	Athletic Data Innovations	Athlete monitoring platform	Hudl (USA), a leading in sports performance analysis and video technology acquires Athletic Data Innovations (Australia)	Acquisition	Undisclosed
October 2025	Catapult Sports (ASX:CAT)	Sports wearables and analytics for athlete performance	Catapult Sports acquires sports scouting and intelligence platform IMPECT (Germany)	Acquisition	A$139 million
July 2025	Optus Sport	Sports media and streaming	Optus Sport ceased operations with the assignment of Premier League and FA Cup football rights to Stan Sports	Ceased operations - assignment of broadcast rights	Undisclosed
June 2025	Vapormedia	Fantasy sports platforms	News Corp Australia acquires Vapormedia (Australia), creator of fantasy sports platform SuperCoach	Acquisition	Undisclosed
June 2025	Catapult Sports (ASX:CAT)	Sports wearables and analytics for athlete performance	Catapult Sports acquires Perch (USA), an MIT spin-out that monitors and manages weight room performance	Acquisition	A$28 million

Australian Capital Raising Activity (2025-2026)

Date	Company	Description	Transaction Activity	Amount
February 2026	SportsHero (ASX:SHO)	Digital gaming and esports	Investment raised through private placement of shares to accelerate the rollout of the HeroPlay product through its SE Asian channels	A$4.3 million
January 2026	Rapid Nutrition PLC (Euronext Growth: ALRPD)	Evidenced-based nutrition and innovative weight management app	With primary operations in Australia through its subsidary Rapid Nutrition Pty Ltd the business raised €5 million from an undisclosed investor to accelerate growth in Australia, US and China	€5 million
January 2026	Hapana	Member management solutions for gym and fitness industry	Investment led by Sydney asset manager Microequities and follow-on from OIF Ventures to support the next generation of the platform, expand its global team and support growth in key international markets	A$7.25 million
December 2025	Bodd	3D body scanning platform	Investment led by strategic investor Blue Sky Capital (USA), supported by Ellerston Capital to support expansion into the US, UK and Middle East	A$15 million
October 2025	ROLLER	Enterprise software for leisure and entertainment venues	Investment led by Insight Partners and JP Morgan to accel-erate next generation solutions for customers and enhanced global support	US$50 million
October 2025	Catapult Sports (ASX:CAT)	Sports wearables and analytics for athlete performance	The ASX-listed company raised A$130 million from institutional investors and A$20 million from a share purchase plan to acquire sports scouting and intelligence platform IMPECT for A$139 million	A$150 million
July 2025	Everlab	Advanced health screening diagnostics and longevity programs	Investment led by Left Lane Capital (US / UK) to accelerate international expansion and development of Everlab's proprietory AI healthtech platform	A$15 million
July 2025	Betmakers Technology Group (ASX:BET)	Data analytics solutions for wagering markets	The ASX-listed company raised funds from a retail share purchase plan to fund US expansion and repay debt	A$13.7 million
May 2025	MyVenue	Point-of-sales solutions for stadia and venue	Growth equity investment from Greater Sum Ventures (USA) to accelerate global growth and improve in-house software development and R&D	Undisclosed

Australian Sportstech Venture Capital and Startup Programs

The Australian sportstech sector has operated in a challenging capital raising environment until recent years, with sophisticated investors often viewing the sector as niche and primarily building solutions for high-performance sport with a small addressable market. However, as the sports industry matures, investment opportunities beyond high performance applications have started to emerge.

This recent push has been driven by the commercialisation of sports data and fantasy sports, developments in technologies for major sports events and entertainment, as well as the emergence of technology diffusion into adjacent sectors beyond just sport.

Over the past five years, both domestically and globally, ASTN has seen a more coordinated and sophisticated sportstech venture capital and investment market emerge to capitalise on these opportunities.

Investors led by well-established family offices, as well as principals with strong ties to the Australian sports landscape have started making investments into startups in the sector. This activity bodes well for the future development of Australia's sportstech sector, although early-stage funding for most sportstech startups remains challenging.

The most significant development in Australia's sportstech venture capital market occurred in January 2025 when Tennis Australia's venture arm AO Ventures, closed a US$30 million sportstech fund. The fund is backed by some of Australia's most prominent investors, including Mark Nelson from Caledonia, Tanarra Group's John Wylie, Ashok Jacob from Ellerston Capital and Wollemi Capital Group led by Robyn Denholm and Victoria Denholm.

AO Ventures is looking to invest in the seed to Series A phase (US$300 thousand to US$1.5 million), in up to 20 businesses across a four-year period. Tennis Australia's AO Startups program provides a pipeline of opportunities for AO Ventures to consider. AO Ventures announced its first investments in February 2026. This has included Bolt6, a global leader in AI-powered officiating, broadcast and data services; Raven Controls, an incident management platform for large scale events; Mindspring Padel, tech-enabled Padel court infrastructure, and; Padel Haus, a premium padel club operator in the US.

Tennis Australia's investment arm was initially launched and branded as Wildcard Ventures in 2021 to invest in early-stage technology companies sports, health and entertainment industry. Wildcard offered investor syndicate opportunities to opt-in or out of investments on a case-by-case basis. Wildcard has invested in five portfolio companies.

XV Capital, established by former Australian Wallabies captain Stirling Mortlock, has also become an active investor in pre-seed and seed funding rounds as well as sportstech corporate advisor. XV Capital has a portfolio of eight companies, which has included investments in several Australian sportstech startups.

Another active sports-related investor in the market is Athletic Ventures, a syndicate of over 100-plus current and former elite athletes that make industry-agnostic investments in typically well-established high-growth businesses. To date, Athletic Ventures have made investments into 19 companies including two sports and health technology companies. Athletic Ventures is currently raising for its Athletic Ventures Champions Fund from wholesale investors.

There are also several industry-agnostic investors and venture capital firms making investments into Australian sportstech companies. This has included listed investment company, Bailador Technology Investments and IOF Ventures as well as venture firms Skalata and Artesian.

Gandel Invest, a Melbourne-based family office and experienced early-stage investor with a portfolio of 45 investments across a range of industries, has co-funded four ASTN Pre-Accelerator Program cohorts over the past two years. Participants in the program are offered the opportunity to pitch for pre-seed funding from Gandel Invest.

In 2024, ASTN also announced a partnership with the Queensland Investment Corporation (QIC) via the Queensland Venture Capital Development Fund (QVCF) to deliver an investment-ready program for up to 40 Queensland-based sportstech startups over two years. The program prepares participating sportstech startups to pitch for investment from QIC-backed private funds as well as unrelated early-stage investors.

In 2024, ASTN also launched a Venture Capital Partner Network to lead targeted matching between vetted sportstech startups and venture capital firms in which Gandel Invest and QIC became an inaugural partner.

Beyond these investors, ASTN has identified several successful Australian sportstech executives and sophisticated investors seeking both minority investment and acquisition opportunities in Australian sportstech startups.

This investment activity bodes well for the future development of Australia's sportstech sector; however, a funding gap remains at Series A (A$5-10 million and above) for Australian sportstech companies. At this stage, many startups have already expanded offshore and are increasingly turning to international capital to support global growth strategies.

Sport is now being considered as a stand-alone asset class by investment banks and private equity firms, which are playing a more active role in mergers, acquisitions and financing of teams, leagues (both new and existing), and sportstech companies.

Unprecedented M&A and Capital Raising Activity in Global Sportstech Markets

The sport industry is attracting an increasing flow of capital, which in turn is a key driver of continued growth in the global sportstech sector. Sport is now being considered as a stand-alone asset class by investment banks and private equity firms, which are playing a more active role in mergers, acquisitions and financing of teams, leagues (both new and existing) and sportstech companies.

There are several factors that have been driving the strong investment into the sports and entertainment industry over the last two to three years. This includes;

- Increased interest and deals from various sources including sovereign funds, private equity, family offices and globally recognised elite athletes.
- Increased deals involving big technology companies across everything from wearables and fitness tech to live sports streaming.
- Increased operational and branding synergies in owning teams across multiple sports and geographies.
- Scarce and limited number of high-value professional sports teams to invest in with global reach.
- The professionalisation of sports, with the emergence and growth of new leagues, teams and formats.
- The legalisation and regulation of sports betting (specifically in the United States) and the massive global appetite for in-game sports data.
- Restructuring of college sports, particularly with NIL-regulations (name, image, likeness) providing commercial opportunities for college athletes.

According to Drakestar, a global technology-focused investment bank, the global sportstech market hit unprecedented levels of mergers and acquisitions and capital raising activity in 2025.

A total of 1,026 mergers and acquisitions and capital raising deals valued at US$199.8 billion were recorded for the year. It should be noted that this amount includes US$82.7 billion for the now withdrawn acquisition of Warner Bros by Netflix. Nonetheless, the adjusted US$117.1 billion in deals for 2025 well exceeds the US$86.2 billion recorded in 2024.

Excluding the withdrawn Netflix-Warner Bros acquisition total value of mergers and acquisitions was US$73.3 billion (on 450 deals) in 2025 compared to US$67.8 billion (on 453 deals) for 2024. The highlight was the acquisition of EA Sports for US$55 billion by Saudi Arabia's Public Investment Fund (PIF) and Silver Lake.

A record US$14.3 billion (500 deals) was raised through private placements in 2025, a significant increase from US$4.5 billion (648 deals) in 2024. Highlights included DAZN's US$2.2 billion financing, and key capital raises from the likes of Oura (US$900 million), NEP Group (US$700 million) and Teamworks ($US235 million).

Capital raised by sports investment funds more than doubled from US$14.1 billion (50 deals) to US$29.5 billion (76 deals). There continued to be significant inflow of capital from investment banks and private equity through 2025. Firms including Apollo, TPG, Sixth Street and Ariel Investments launched new or follow-on sports-focussed funds, whilst venture funds Apex Capital (US$350 million) and Monarch Collective ($US250 million) were also significant investors. CVC also launched Global Sports Group, consolidating US$13.6 billion in sports assets.[15]

Despite the rise in activity, the Saudi Arabia's Public Investment Fund (PIF), a significant player in the sports investment market, announced in April 2026 that it is scaling back its sports investment internationally to focus on domestic sports infrastructure and sports development. PIF confirmed that it will cease funding of LIV Golf after 2026, concluding an estimated investment of US$8 billion in the league.

15. Drake Star. (2025). Sports Tech Market 2025. https://www.drakestar.com/news/sports-tech-market-2025-landmark-year-for-sports-tech-200b-deal-value

New Sportstech Innovation Programs Support Aussie Sportstech Entrepreneurs

Historically, startups in Australia's sportstech ecosystem have been predominately supported through ASTN's two flagship programs – the ASTN Accelerator (17 cohorts, commenced 2014) and ASTN-GSIC Pre-Accelerator (11 cohorts, commenced 2020). These long-standing programs have successfully supported 315 founders, with participating businesses raising more than A$100 million in investment capital.

Tennis Australia's AO Startups (8 cohorts, commenced 2022) has also provided sportstech startups with opportunities to test and promote their solutions through the world-class Australian Open tennis event and broader tennis ecosystem. This program provides a pipeline of potential deals to Tennis Australia's newly formed US$30 million AO Ventures fund. AO Ventures announced its first investments in February 2026.[16]

Over the years, many sportstech startup programs have emerged and phased out over time. This has included the Techstars Sportstech Accelerator, Startup Bootcamp's Sports & EventsTech Accelerator, Hype UQ SPIN Accelerator and the Sydney Sports Incubator.

Three new sportstech startup programs have launched in Australia over the past 18 months. This includes the Australian Sports Commission / Australian Institute of Sport's 'The Park' – a virtual innovation hub and six-month program designed to connect technology-driven companies with the Australian sports industry. The inaugural intake of five startups was announced in December 2025.[17]

Another new initiative includes the National Rugby League's (NRL) 2025 Magic Round Tech Sprint. The program supported eight Queensland-based businesses to refine and adapt their technologies to meet the needs of the NRL and its clubs. Each successful business received A$25,000 in proof-of-concept funding and mentoring which was facilitated and managed by ASTN.[18]

In February 2026, Queensland-based LuminaX also announced a commitment to supporting technology startups operating at the intersection of health, performance, and elite sport through a partnership with the NRL and LuminaX's HealthTech Accelerator.[19]

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16. Australian Open (Tennis Australia). (2025). AO Ventures completes first close of US$30 million venture capital fund. https://ausopen.com/articles/news/ao-ventures-completes-first close-us30-million-vc-fund
17. Australian Sports Commission. (n.d.). The Park: Research and innovation program. https://www.ausport.gov.au/services-and-programs/research-and-innovation/thepark
18. Australian Sports Technologies Network. (2025). NRL Magic Round Tech Sprint. https://www.astn.com.au/industry-events/nrl-magic-round-sportstech-showcase-2025
19. LX Health. (2026). LuminaX HealthTech Accelerator (NRL partnership announcement). https://lxhealth.com.au/nrl-partnership-2026/

5. THE GLOBAL SPORTSTECH SECTOR

For a sector that barely existed in 2010, characterised by limited coordination and investment, the global sportstech sector has developed into a mature and sophisticated industry within a 16-year period.

Benchmarking Innovation Activities in Sportstech Globally

ASTN's research team monitors the development of the global sportstech sector in an ongoing capacity. This research enables ASTN to benchmark geographic locations, determine regional hotspots and identify key stakeholders to enhance Australia's connectedness to support future trade opportunities.

To better understand clustering of sportstech activity globally, ASTN monitors;

- Sportstech startup programs: accelerators, open innovation programs, venture studios, pre-accelerators and labs.
- Sportstech industry networks and clusters: Organisations that play a similar role to that of ASTN.
- Sportstech investors: Sportstech venture funds, sports corporate venture capital (i.e. teams, leagues and sports brands), athlete venture capital, general venture capital (with sports investment thematic) and sports angel networks.

Across the global sportstech ecosystem, ASTN's research identified 210 sportstech investors, 80 active industry clusters and networks, and 126 active startup programs (plus 49 inactive programs).

ASTN: A Global Pioneer in Sportstech Leadership

The idea for developing the Australian Sports Technologies Network (ASTN) was seeded in 2011, with ASTN formally established in April 2012.[20] Its co-founders, industry stakeholders and board had the foresight that the sportstech sector was about to boom, and that Australia needed an industry-led body to advocate, promote and coordinate the industry to leverage future opportunities. Today, ASTN stands as one of the pioneering exemplars with the likes of Cluster Sports & Technology (the Netherlands) established in 2005 and San Diego Sports Innovators (USA) established in 2010. These organisations have played a crucial facilitation role in building strong sportstech ecosystems in their regions for over 15 years.

The Rise and Evolution of the Global Sportstech Sector (2000-2026)

The global sportstech sector was in its infancy through the first decade of the century. However, the sector experienced significant growth through the following 10 years to 2020 with rising digital adoption in sport. Industry networks and clusters rose five-fold from around nine in 2014 to 53 by 2020, mainly to coordinate, support and promote the growing sector. Likewise, accelerator programs started to emerge, particularly across the US and western Europe, to support and invest in the growing startup communities.

Since 2020, sports teams, leagues and federations as well as large sports corporations have started to play a more active role in engaging with a maturing sportstech sector. There are currently 37 open innovation programs and 13 venture studios in operation, most of which have been established in the last six years. Coinciding with the sector's maturation, there have been significant inflows of venture capital into the sports industry. Over the last three to four years, sophisticated investors including private equity, investment banks and sovereign funds have been particularly active in investing into teams, leagues, media and entertainment and sportstech companies. The number of sportstech investors has more than doubled over the past eight years, increasing from 98 to 210 in 2026.

For a sector that barely existed in 2010, characterised by limited coordination and investment, the global sportstech sector has developed into a mature and sophisticated industry within a 16-year period.

20. Australian Sports Technologies Network. (n.d.). History. https://www.astn.com.au/history

The United States and Western Europe Dominate Sportstech Activity

The United States (US) and Western Europe are clear regional leaders in the global sportstech sector. Of particular note, the US dominates sportstech investment activity, and accounts for 66% of the 210 investors identified in ASTN's research. Europe trails a distant second at just 16%. In contrast, 63% of industry clusters and networks, and 51% of startup programs are based in Europe – with Spain, France, the Netherlands and Switzerland particularly active countries. A total of just 16% of all industry clusters or networks and 27% of all startups programs are based in the US, yet it remains the second most active region for these activities.

These statistics suggest that there are differing approaches to industry development within the US and western European economies. In the US, the investment-driven nature of the economy as well as significant value of US professional sports provides the impetus for an investor-led sportstech industry development approach. In contrast, the European economy is driven by stronger industry collaboration and coordination, with established industry clusters and networks playing an important role in facilitating growth.

Sportstech Activity by Region (2026)

The North American and European regions account for around 81% of total global sportstech activity defined by the number of investors, industry clusters and networks, and startup programs. As highlighted, the US, Spain, France, the Netherlands and Switzerland are dominant players across the two continents, and account for around 60% of total activity globally.

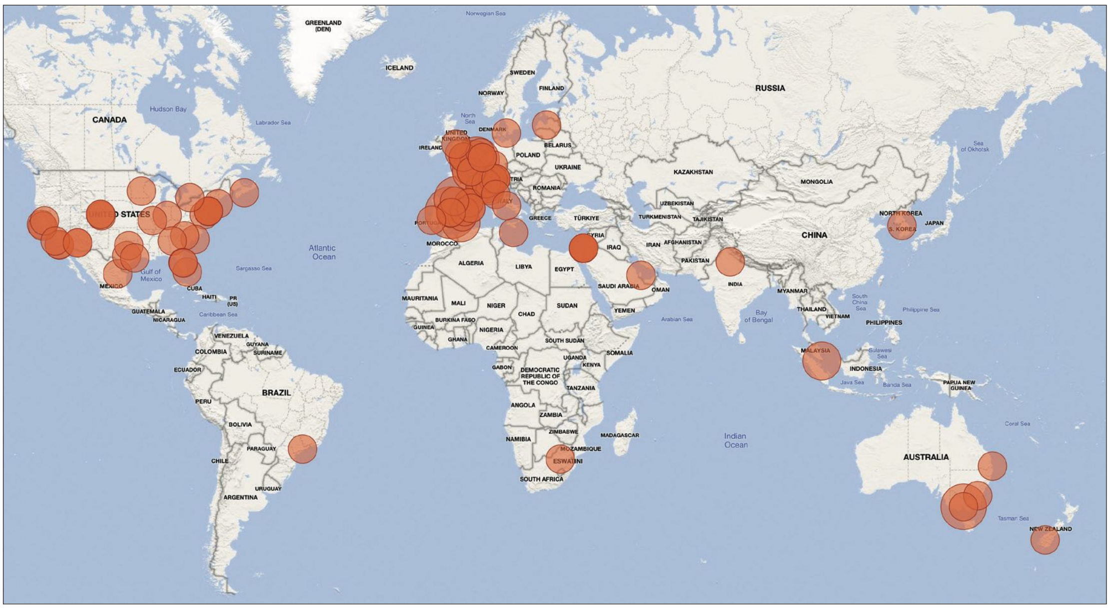
The rest of the world represents just 19% of activity, with Asia (6%), United Kingdom (UK) (5%) and Oceania/ Pacific (5%) accounting for the majority of this share. The Middle East and North Africa (MENA) may continue to rise in importance with sports investments led by sovereign funds from Saudi Arabia, Qatar and United Arab Emirates, while activity remains limited in South America and Africa.

The US, Spain, France, the Netherlands and Switzerland are dominant players across the two continents, and account for around 60% of total activity globally.

Activity by Region

	Investors	Startup Programs	Clusters / Networks	Total Activity
North America	139	34	15	188
Europe	33	64	50	147
Asia	10	11	6	27
UK	14	6	3	23
Oceania / Pacific	9	8	2	19
MENA	3	1	1	5
South America	1	1	2	4
Africa	1	1	1	3
	210	**126**	**80**	**416**

Map of Active Sportstech Startup Programs - 2026



Map of Sportstech Networks & Clusters - 2026

"Norway in 2026 stands roughly where Australia was positioned in 2014-2015 on actor density (…). Australia built its position through 13 years of systematic work. ASTN was established in 2012, the AO Ventures fund of USD$30 million came in 2021, and the accelerator program has helped 80+ companies raise AUD$87.5 million collectively. That is not the result of luck. It is the result of choosing to build the structure."

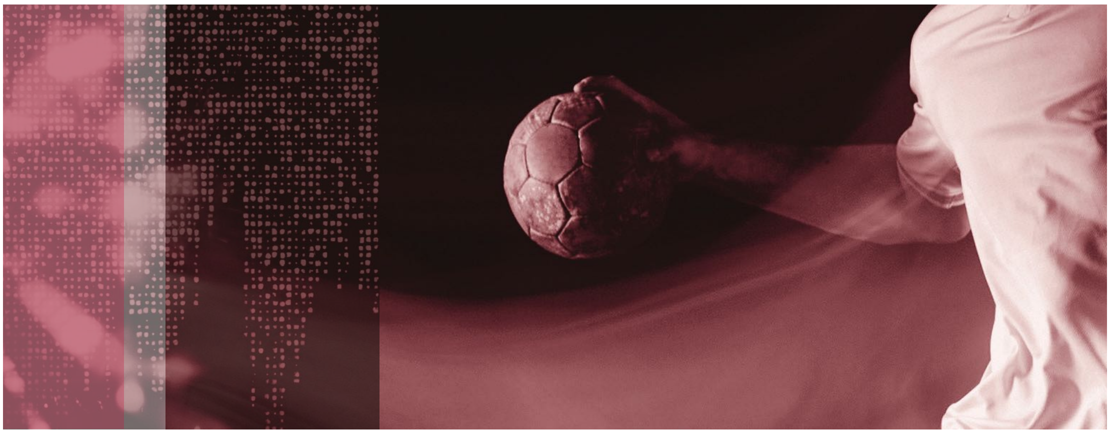
Håvard K Bjor, Chairman of the Board,
Norwegian Sports Tech [21]

21. Norwegian Sport Tech, Norwegian Sport Tech Report 2026 – Founding Edition, 2026, https://norwegiansporttech.com/news/nst-report-2026-publisert

Map of Sportstech Investors - 2026

"Paris 2024 marked a historic first: for the very first time, a dedicated innovation department was created within an Olympic and Paralympic Games organising committee. We were handed a blank page, and we are proud of what we built. But looking back, one thing stands out as a missed opportunity: when the organising committee closed its doors, all that knowledge, all those learnings, simply disappeared. Had an independent, sport-focused innovation intermediary been assigned that role (one spanning the full spectrum from fan experience to athlete nutrition and infrastructure), for example, like SporTech in France or ASTN in Australia, it could have served as a living repository, a springboard for the entire sports ecosystem, and above all, a lasting legacy for France, French sport, and every major event to come."

Claire Goyon, Directrice Générale
Managing Director, SporTechFR



"The inclusion of organisations like ASTN in the Trade Diversification Network reflects the future of Australia's sport industry, where innovation and export capability go hand in hand to unlock global opportunities and position sport as a key driver of economic growth, including in the lead up to major events such as Brisbane 2032."

Jay Meek, General Manager, Trade Diversification Taskforce, Austrade

Australian Government
Australian Trade and Investment Commission

Austrade and ASTN: Partnering to Support Global Sportstech Growth

Austrade plays a key role in connecting Australian sportstech capability with global opportunity, supporting businesses to access international markets, build partnerships, and scale innovation. As the national trade and investment agency, Austrade works alongside ASTN to help strengthen export pathways and accelerate the growth of Australia's sportstech sector in a rapidly evolving global market.

The Australian Trade and Investment Commission (Austrade) is Australia's national trade and investment promotion agency, connecting global organisations with Australian innovation, capability, and opportunity. Austrade supports international partners to source Australian technologies, invest in high-growth sectors, and build impactful collaborations.

Australia's sports technology ecosystem is globally recognised, combining elite sports performance expertise with strengths in AI, data analytics, and digital innovation. Through Austrade, ASTN partners can efficiently access this ecosystem, spanning startups, research institutions, high-performance sport organisations, and enabling technology providers.

Through the Trade Diversification Network (TDN), ASTN is working with Austrade to design strategic activities that address the specific needs of the sports technology sector. This deep collaboration leverages Austrade's global network of trade experts across 61 international locations, combining practical market intelligence and in-market support with ASTN's sector expertise to help Australian sportstech businesses grow internationally.

6. GEOGRAPHIC MAPPING

A Globally Significant Sportstech Cluster on Australia's Eastern Seaboard with Over 800 Companies

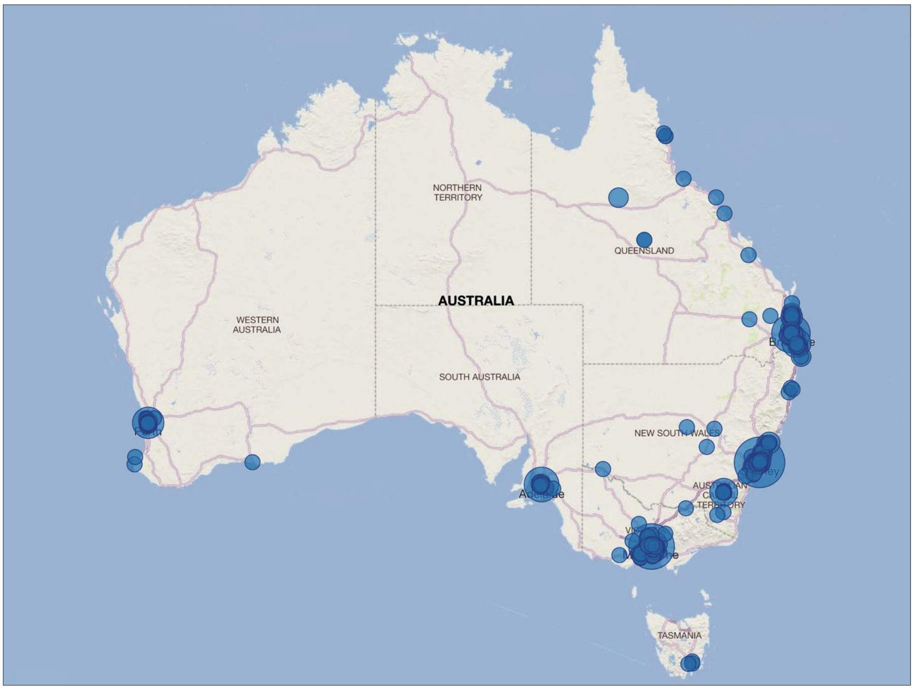
Australia has developed a globally significant sportstech cluster on its Eastern Seaboard, driven by a high concentration of sports technology businesses and the depth of capability, innovation and expertise across the region.

By ASTN's definition, Australia's Eastern Seaboard includes Victoria (VIC), New South Wales (NSW), Australian Capital Territory (ACT) and Queensland (QLD). Geographically, 79% of the Australian population lives on the Eastern Seaboard, with around 21.9 million people.[22]

This geography accounts for 817 of the 924 sportstech businesses identified by ASTN, representing 88% of the total sector in Australia. Sector activity is highly concentrated in the three major population centres of Melbourne (VIC), Sydney (NSW) and the South-East Queensland region (Brisbane, the Gold Coast and the Sunshine Coast).

Activity outside metropolitan areas is relatively limited, as shown in the heat maps on the following pages. These maps indicate that the majority of the 817 businesses are located within a 15-20km radius of the city centres of Melbourne, Sydney, Brisbane, Surfers Paradise (Gold Coast) and Noosa (Sunshine Coast).

Australia has developed a globally significant sportstech cluster on its Eastern Seaboard, driven by a high concentration of sports technology businesses and the depth of capability, innovation and expertise across the region. This geography accounts for 817 of the 924 sportstech businesses identified by ASTN, representing 88% of the total sector in Australia.



22. Australian Bureau of Statistics, National, state and territory population: September 2025, 2026. https://www.abs.gov.au/statistics/people/population/national-state-and-territory population/latest-release

The Victorian Government recognises sport and major sports events as a key economic driver. It continues to invest into sporting and event infrastructure and leads a world-class major sports events calendar highlighted by the Australian Open tennis, the Australian F1 Grand Prix and Melbourne Cup.

Victoria

Victoria (VIC) continues to be the epicentre of Australia's sportstech sector, with 349 businesses representing 37.8% of the total.

Melbourne is home to the Australian Sports Technologies Network (ASTN) and many leading sportstech companies including Catapult Sports, PMY Group, Champion Data, GTG Network, SEN, Racing.com, Rosterfy, KicApp, Playside Studios and Big Ant Studios.

The heat map for Victoria highlights the concentration of businesses in the Melbourne CBD, inner city suburbs (within 10km of the CBD) and the south-eastern corridor.

This geographic distribution may be partly explained by the proximity of businesses to Melbourne's major sports precincts. Many national and state sporting organisations, professional sports teams and related industry stakeholders are based in and around the CBD, particularly in Richmond, Cremorne, Docklands and South Melbourne.

The Victorian Government recognises sport and major sports events as a key economic driver. It continues to invest into sporting and event infrastructure and leads a world-class major sports events calendar highlighted by the Australian Open tennis, the Australian F1 Grand Prix and Melbourne Cup. In September 2026, Melbourne will host NFL's first-ever regular season game in Australia. In addition, the city hosted a number of NBA pre-season games in 2025.

The Victorian Government's investment in inner-city sports precincts is cementing the infrastructure and facilities as some of the best in the world. The Melbourne Cricket Ground (MCG) hosts around 3.5 million patrons per annum, Marvel Stadium more than 2 million, the Melbourne Park precinct hosts nearly 4 million patrons per annum (including 1.37 million at the Australian Open) and the Australian Formula 1 Grand Prix hosts nearly 500,000 people over four days.

The Australian Open has become a mega sports and entertainment event and is widely regarded as a beacon of innovation both on and off the court. The event also hosts AO Startups, an initiative led by Tennis Australia that provides emerging startups from around the world an opportunity to promote their technologies during the Australian Open each January. This program also provides deal flow for the Tennis Australia-backed sportstech investor, AO Ventures, a US$30 million fund dedicated to investing in sportstech startups.

Australia's Sports Innovation Week, including the Sports Tech World Series (STWS) Conference, is usually hosted in Melbourne. ASTN has supported the event for several years and in 2025 hosted the Australia New Zealand Sports Technology Awards (ANZSTA) during the week.

For the first time in 2025, Australia's Sports Innovation Week expanded its conference and exhibition proceedings through a partnership with the Content Live Technology Show, bringing together the most innovative technologies and practitioners in sportscasting, newscasting, and live event production.

SportNXT, the premier business of sport conference in Australia, also continues to grow its domestic and international audience. The conference has traditionally been held alongside the Australian Formula 1 Grand Prix in March. In 2026, it will align with the NFL regular-season game between San Francisco 49ers and the Los Angeles Rams, to be played in Melbourne in September 2026.

The Victorian Government has been a long-standing partner of ASTN, supporting the growth of Victoria's sportstech sector through sustained investment in a range of initiatives over more than a decade. This was demonstrated by a A$4 million, four-year investment in ASTN's Australian Sports Innovation Centre of Excellence (ASICE) facility, including its associated programs and activities. This investment contributed to the creation of 2,253 jobs within Victoria's sportstech sector between 2021 and 2025.

The Victorian Government has also partnered with ASTN through its technology startup agency, LaunchVic, which supported the delivery of ASTN's Accelerator and ASTN-GSIC Pre-Accelerator Programs over six years. A total of 152 Victorian sportstech startups participated in early-stage or growth-stage mentoring programs during this period. This represents almost half of the total program participants.

Global Victoria, the Victorian Government's trade and investment facilitation agency, continues to support sports-related international trade missions and business matching excursions to priority markets around the world. Of note, Global Victoria facilitated its second sports delegation to the Gulf countries (Qatar, United Arab Emirates and Saudi Arabia) with 19 Victorian sports organisations in November 2025.

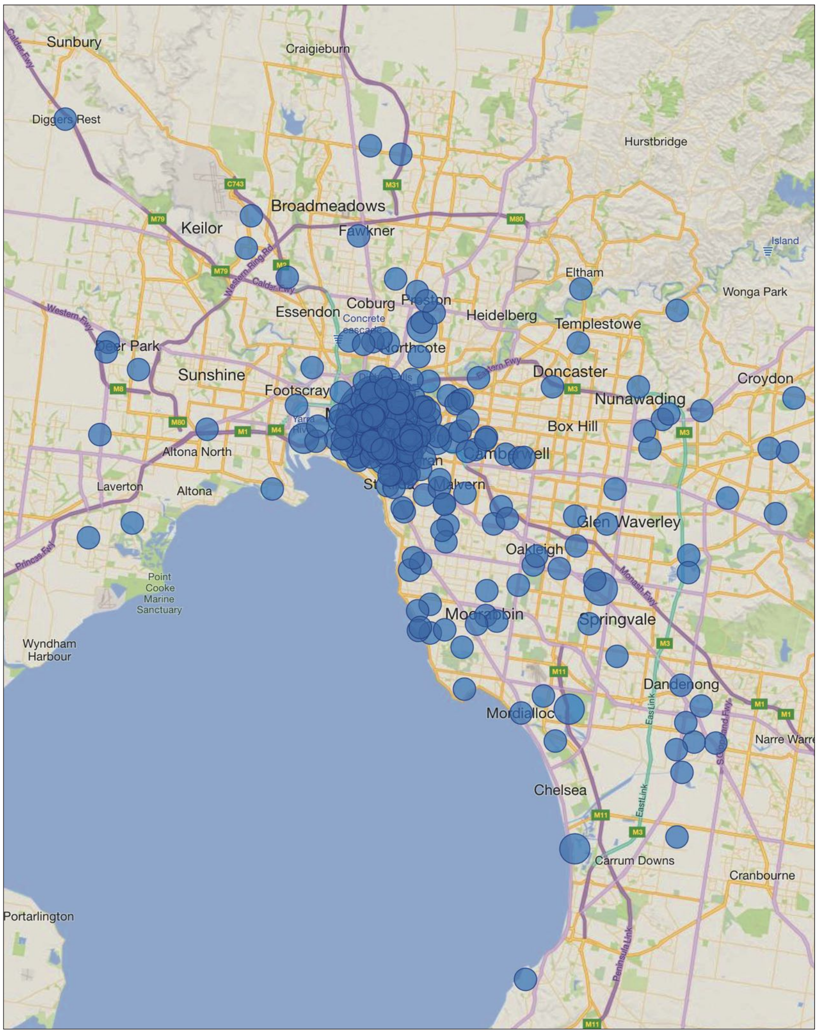
In addition to domestic capability-building initiatives, this support helps Victoria's sport-related organisations access new international markets, build commercial partnerships, and accelerate export growth. This reinforces Victoria's position as a globally connected sportstech hub.

The Victorian Government also continues to support ASTN through a range of industry engagement initiatives, including events and showcase opportunities in FY2026, and remains the major partner of this report.

Like several other city councils in key sporting states, the City of Melbourne has taken a lead in prioritising sports and sportstech as a key industry sector to drive economic growth, create jobs and cement its reputation as a global hub for expertise, innovation and investment. ASTN is working closely with the City of Melbourne to highlight opportunities to bring the Victorian sportstech community to the city centre. This included an inaugural Sportstech Executive Forum in May 2026, which brought together senior leaders from more than 25 of Melbourne's leading sports organisations.

The City of Melbourne has taken a lead in prioritising sports and sportstech as a key industry sector to drive economic growth, create jobs and cement its reputation as a global hub for expertise, innovation and investment.

Greater Melbourne Business Locations



Based on the current trajectory of industry and innovation policy in New South Wales, and the relative growth of other states, ASTN forecasts that New South Wales will account for a declining share of Australia's sportstech sector over the medium term.

New South Wales

Approximately 242 businesses, representing 26.2% of Australia's sportstech sector, are based in New South Wales (NSW), with the majority concentrated in Sydney's CBD and inner-city suburbs.

Sydney is also home to the two leading sports broadcast and streaming players, Kayo Sports and Stan Sport – as well as PAM, Bepoz, Hapana, Betmakers, Rebel Sport, GAMURS and Livewire.

Sydney's strength as a key centre for sport is underpinned by two major sporting precincts which are based in the inner south (Moore Park), with the Sydney Olympic Park Precinct located 15km west of the city centre. Despite the presence of more than 50 sports federations, professional teams and the New South Wales Institute of Sport (NSWIS) at the Sydney Olympic Park Precinct, there are only a relatively small number of sportstech companies operating in and around this area.

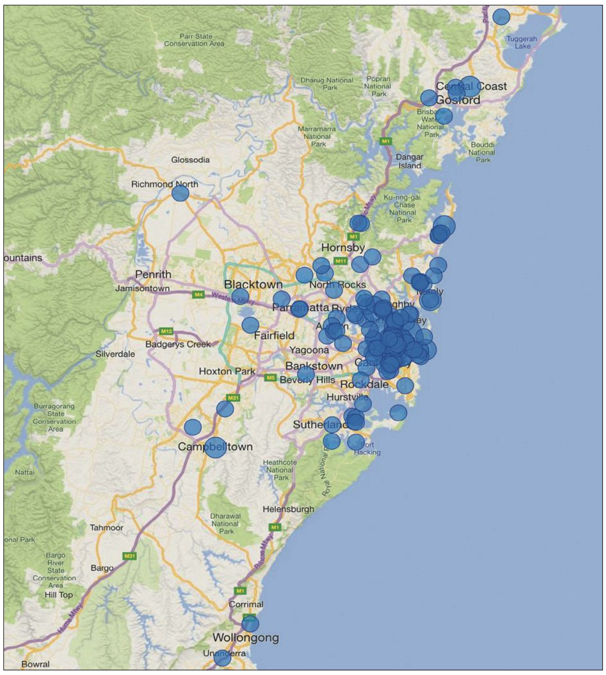
To date, apart from the MVP Venture Program, there has not been any direct public sector program funding in New South Wales to support early-stage and growth-stage sportstech businesses. Despite the economic opportunity, sport is currently not positioned as a priority industry sector by the state government.

Future engagement with the sportstech sector, including ASTN's programs and activities, represents an opportunity to drive further collaboration across sport, industry and government to support innovation and export-led growth.

Leaders of Australia's emerging sportstech investment community such as Bailador, IOF Ventures, XV Capital, Wollemi Capital and Athletic Ventures are based in Sydney, and may provide an anchor point for coordinated development of the sector in the region.

Despite limited industry development support, ASTN has supported 35 New South Wales startups across early-stage and growth-stage programs, including 30 through the Pre-Accelerator and five through the Accelerator. Based on the current trajectory of industry and innovation policy in New South Wales, and the relative growth of other states, ASTN forecasts that New South Wales will account for a declining share of Australia's sportstech sector over the medium term. The state's share of business numbers has declined from 29.9% in FY2023 to 26.2% in FY2026 which is predicted to continue.

Greater Sydney Business Locations



Queensland

Queensland (QLD) is the fastest growing sportstech state in Australia. A total of 208 companies are based in the state, representing 22.5% of the domestic market, up from 18.9% in FY2023. ASTN has supported 12 Queensland sportstech startups in the ASTN Accelerator Program and 60 in the ASTN-GSIC Pre-Accelerator Program, with many of these in the most recent cohorts.

Based on current policies, investments and trends, Queensland is now projected to surpass New South Wales by 2028, becoming the second largest sports technology sector in Australia, as measured by business numbers and employment. The Queensland sportstech sector is highly concentrated in South-East Queensland – namely the inner-Brisbane suburbs, followed by the Gold Coast, then the Sunshine Coast. Beyond this, there is very little activity in regional or rural areas.

High-growth companies including VALD, Lorna Jane, SimTech, SwiftPOS, Next Level Racing, PWR Advanced Cooling Technologies, Evolt360, etrainu, Body Science, Quiksilver and LSKD are based in Queensland. This highlights Queensland's growing role as a hub for high-growth sportstech and sport-related companies across performance technologies, fitness, and apparel.

Approximately A$7 billion has been committed by the Commonwealth Government and Queensland Government to host the 2032 Summer Olympic and Paralympic Games in Brisbane. Planning, design, construction and procurement of Games infrastructure are now in full swing and includes development of a new 63,000 seat stadium at a cost of A$3.8 billion in Victoria Park. Games infrastructure is mainly concentrated on Brisbane, the Gold Coast and the Sunshine Coast, but will also include regional cities of Cairns, Rockhampton and Toowoomba.

Complimenting this investment in Brisbane 2032 is a significant portfolio of activities and programs that is supporting the development of a vibrant sports innovation ecosystem in South-East Queensland.

Investments and activity have been led from multiple state government departments including the Department of Environment, Tourism, Science and Innovation (DETSI), Department of Sport, Racing and Olympic & Paralympic Games (DRSOPG), Tourism Events Queensland (TEQ), Queensland Academy of Sport (QAS) and Trade Investment Queensland (TIQ).

ASTN is currently working with DETSI and DRSOPG on plans to support and grow Queensland's sportstech and innovation ecosystem to Brisbane 2032 and beyond. This includes the facilitation of workshops and executive forums to understand regional capability and gain deeper insights from key stakeholders.

ASTN has identified key programs, activities and initiatives that have contributed towards the development of Queensland's sportstech and innovation ecosystem over the past four to five years. This includes;

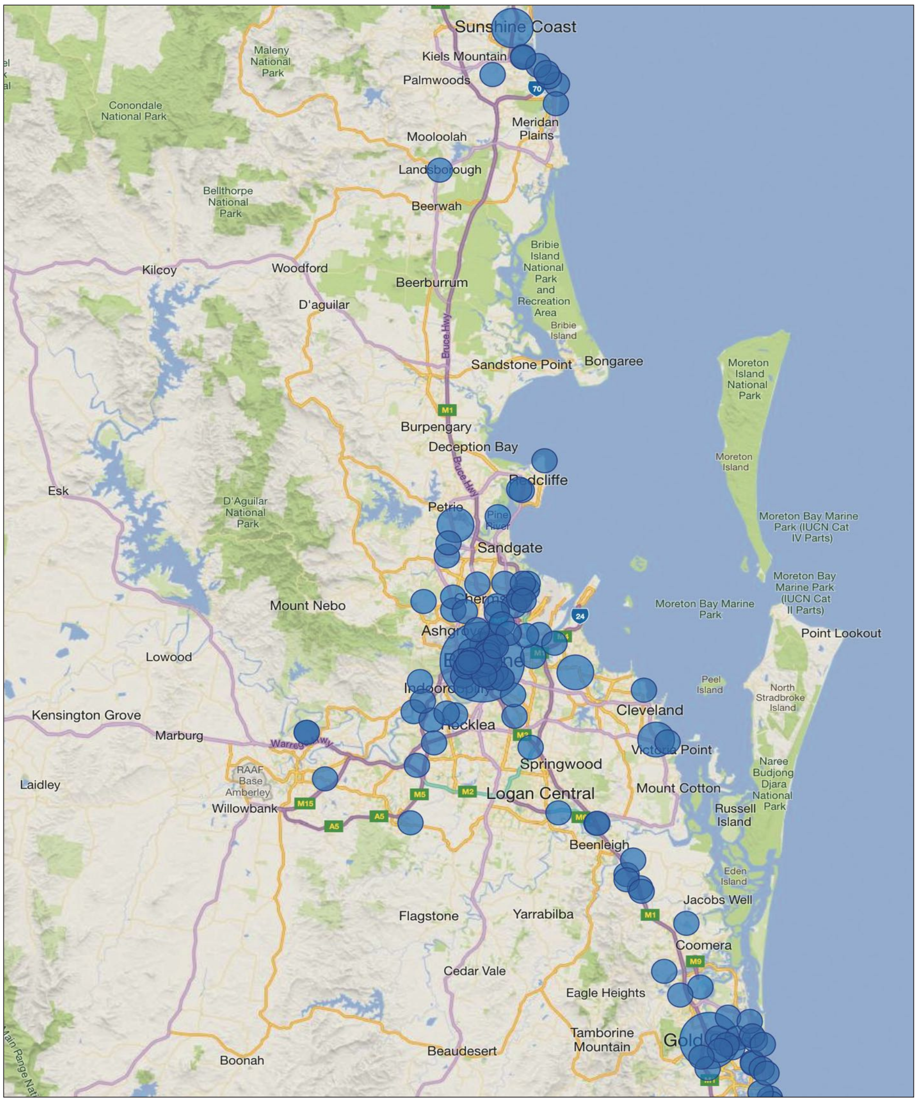
ActiveKIT: A total of A$11.8 million invested into 124 innovative solutions to promote physical activity and active living across three rounds of ActiveKIT, funded under the Queensland Government's Department of Sport, Racing and the Olympic and Paralympic Games, from 2021 to 2024.

Quantum 2032 Challenge: Announced in late 2024, a total of A$8.5 million invested into 12 projects under the program. These projects have the potential to showcase how Queensland's quantum technologies can provide innovative solutions and enhancements for Brisbane 2032 Olympic and Paralympic Games. Projects are being led by five of Queensland's universities covering themes such as athlete performance (sensors and exo-garments), event technologies (including security, communications and transport and logistics) and anti-doping and concussion. The Quantum 2032 Challenge has been funded by the Queensland Department of Environment, Science and Innovation (DETSI).

Based on current policies, investments and trends, Queensland is now projected to surpass New South Wales by 2028, becoming the second largest sports technology sector in Australia, as measured by business numbers and employment.

***ASTN-Queensland Investment Corporation (QIC) Partnership:** ASTN has partnered with QIC to deliver bespoke investment-ready programs to 40 sportstech businesses in Queensland over a two-year period to June 2026.*

South-East Queensland Business Locations



Australian Sports Tech Analytics & AI Research (AusiSTAR) Hub: A A$4.5 million investment by the Queensland University of Technology (QUT) into AusiSTAR launched in May 2024 to support the needs of Australia's sport ecosystem through collaborative, industry-led research, education and training, innovation, as well as talent and business attraction. Partners include the Australian Institute of Sport, CSIRO and the Queensland Academy of Sport along with other universities, sports federations, government agencies and private companies.

ASTN-Queensland Investment Corporation (QIC) Partnership: ASTN has partnered with QIC to deliver bespoke investment-ready programs to 40 sportstech businesses in Queensland over a two-year period to June 2026. Businesses mentored by ASTN as part of the QIC-funded program have also progressed to successfully participate in the NRL's Magic Round Sportstech Showcase activities as well as overseas trade delegations. Amongst the early-stage startups who raised more half a million dollars, 40% were raised by businesses within the first two years of their formation.

NRL Magic Round Tech Sprint and Tech Showcase: The 2025 NRL Magic Round Tech Sprint was a 10-week program designed to connect eight of Queensland's most innovative small businesses with the National Rugby League (NRL) to co-develop cutting-edge sportstech solutions. The Sprint culminated in a high-profile showcase during NRL Magic Round 2025. The NRL incorporated a Tech Showcase as part of Magic Round in May 2026. Proof of concept trials and mentoring activities were facilitated and managed by ASTN.

QAS Ignite 2032 High Performance Conference: The IGNITE 2032 High Performance Sport Conference, hosted by the Queensland Academy of Sport (QAS), brings together leading minds in sport to explore the strategies, stories, and systems that will shape Queensland's journey towards Los Angeles 2028 and Brisbane 2032.

Advance Queensland Ignite Programs: Over multiple years Queensland-based sportstech companies have been recipients of grants under various Advance Queensland business support programs. The Ignite Ideas Fund, for example, provides grants of A$100-$A200 thousand to commercialise new innovations at a minimum viable product stage.

Inbound Japan Sports Delegation: In May 2026, the Queensland Government supported a five-day inbound Japan Sports Delegation with the Japan Australia Sports and Health Innovation Exchange (JASHIE). The initiative is designed to build long-term trade relations in sports between Japan and Queensland.

Western Australia

Approximately 54 sports technology businesses, representing 5.8% of the domestic market, is based in Western Australia (WA). The Western Australian sportstech sector is very concentrated in the greater Perth region, but beyond this there is very little regional activity. Key industry players based in the state include MiClub, Komo Technologies and Aquatic Leisure Technologies.

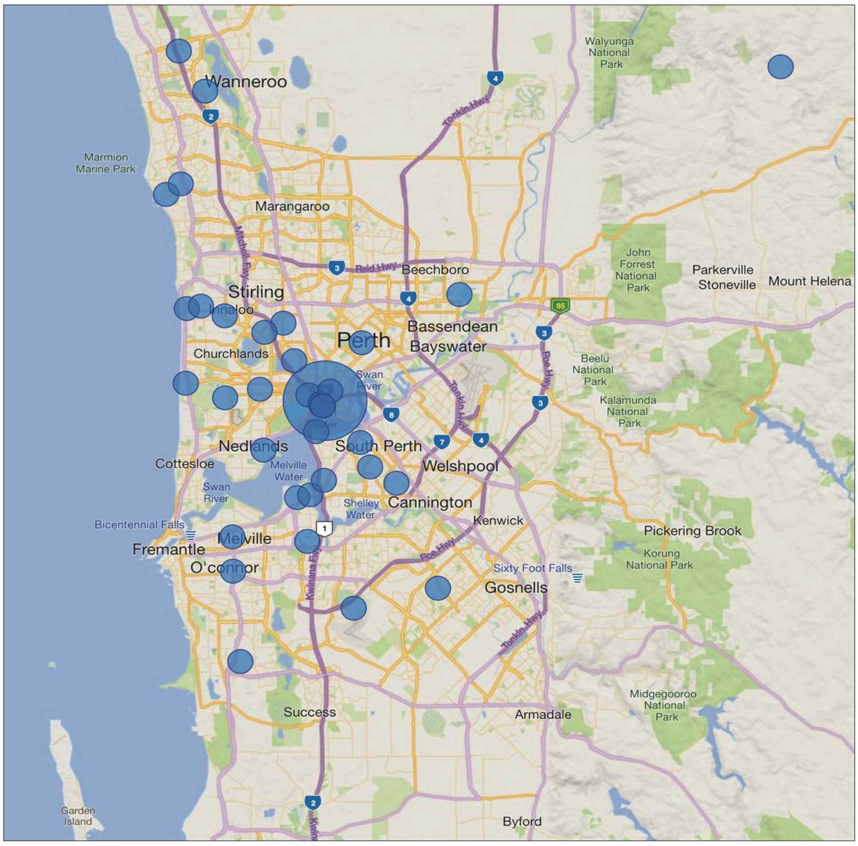
Until 2023, limited work had been done to develop, coordinate and promote Western Australia's sportstech and innovation sector. However, in July 2023 ASTN announced a two-year partnership with the Western Australian Government to accelerate sportstech and innovation within the state. A two-year grant, through the Government's New Industries Fund (X-TEND program), enabled ASTN to engage and support the local sportstech and innovation community.

A total of 20 early-stage and growth revenue sportstech businesses were supported under ASTN's Accelerator and Pre-Accelerator Programs. ASTN also engaged with more than 250 members of the Western Australian sports community through six networking events and three innovation knowledge masterclasses delivered to SportWest (Western Australia's peak sports body) and its member organisations.

Following a two-year agreement with the Western Australian Government, ASTN is currently partnering with Meshpoints to deliver ASTN programs and events. Through FY2026, ASTN supported another 12 startups in its Pre-Accelerator and Accelerator Programs, while six industry engagement events were delivered to build knowledge and share local successes.

In July 2023, ASTN announced a two-year partnership with the Western Australian Government to accelerate sportstech and innovation within the state. A two-year grant, through the Government's New Industries Fund (X-TEND program), enabled ASTN to engage and support the local sportstech and innovation community.

Perth Business Locations



In April 2025, ASTN partnered with the South Australian Government, through the Department of State Development (DSD), to facilitate a South Australian Sports Technology Showcase during the AFL Gather Round Festival in Adelaide. A total of 12 South Australian sportstech companies showcased their solutions, highlighting innovation and leadership in South Australia's sports industry.

South Australia

South Australia (SA) is home to 50 sportstech businesses, representing 5.4% of the domestic market. South Australia's sportstech sector is very concentrated in the greater Adelaide region, and is home to key industry leaders including MyVenue, Big Screen Video and Sweat.

The South Australian Government is investing in major sports events to elevate its status as a sporting hub. It is home to AFL's annual 'Gather Round', Australia's only LIV Golf event, the Tour Down Under cycling race, and the flagship Supercars event, the bp Adelaide Grand Final (formerly the Adelaide 500).

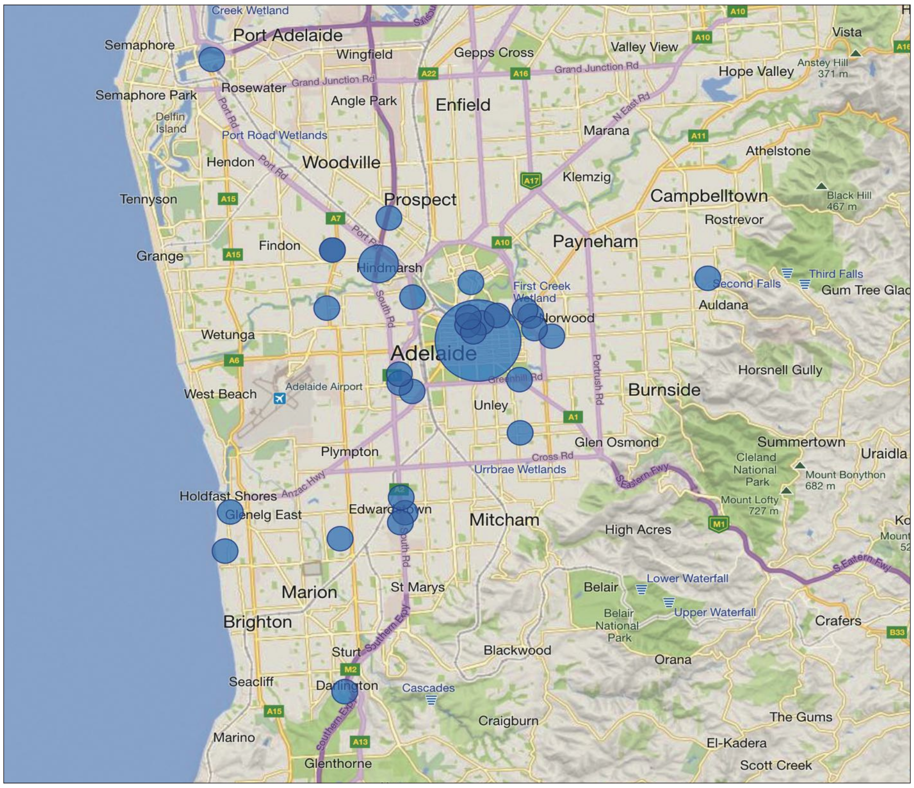
In 2024, ASTN partnered with the Government of South Australia, through the Department of State Development (DSD), and Helix Group on an inaugural South Australian sportstech event, providing the impetus to activate sportstech activities and programs across the state.

In April 2025, ASTN again partnered with the DSD to facilitate a South Australian Sports Technology Showcase during AFL's Gather Round Festival in Adelaide. A total of 12 South Australian sportstech companies showcased their solutions aimed at celebrating innovation and leadership in South Australia's sports industry.

ASTN continues to expand its partnership with DSD to accelerate the growth of South Australia's sportstech companies. In late 2025, ASTN delivered a "Going Global" Program for nine South Australian-based sportstech companies which included a US trade excursion, export-readiness workshops and one-on-one mentoring. This demonstrates the role of targeted programs and international engagement in strengthening the capability and global market readiness of South Australia's sportstech sector.

Continuing momentum, in February 2026, ASTN partnered with LIV Golf in Adelaide to deliver a sportstech showcase and industry event to provide opportunities for South Australian sportstech businesses to promote their solutions to key sports decision makers and executives.

Adeliade Business Locations



Australian Capital Territory

The Australian Capital Territory (ACT) is home to the Australian Institute of Sport (AIS), Australia's high performance sport agency, as well as the Australian Sports Commission (ASC), Australia's peak sporting body.

Although the AIS in Canberra is internationally recognised as a centre of excellence for high-performance sport in Australia, the Australian Capital Territory hosts only around 18 sportstech businesses, accounting for 1.8% of the domestic market.

The focus of the AIS has always been to help Australian athletes and teams gain the winning edge for international competitions. Third-party partnerships have traditionally focused on research, with limited emphasis on engaging early-stage startups or commercialising emerging technologies. However, an opportunity continues to exist for the AIS and ASC headquarters to become more of an anchor for Australia's sportstech innovation and entrepreneurship.

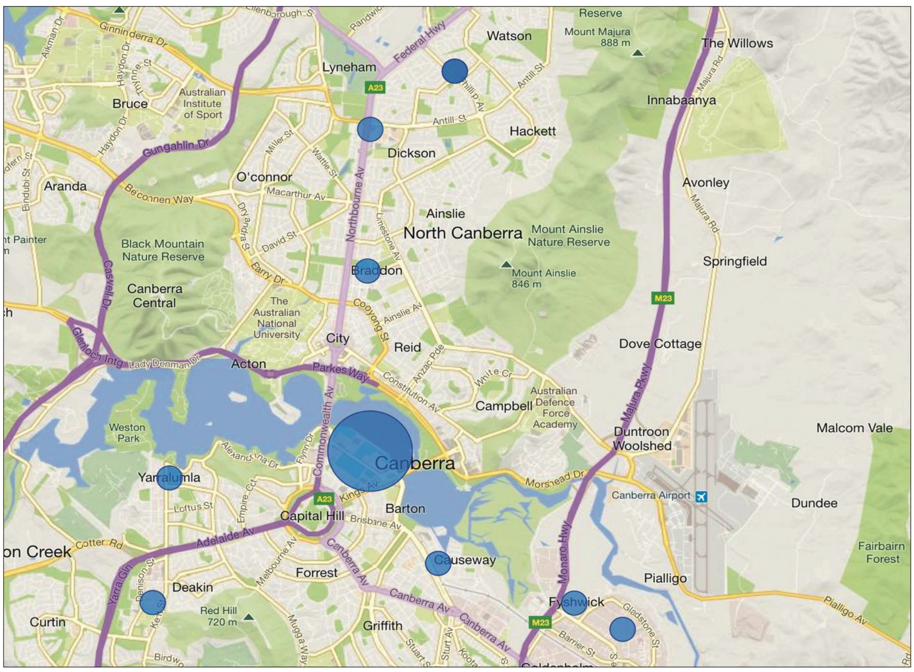
A sportstech innovation hub to support collaboration between startups and leading sports organisations had been under consideration by the ASC for many years. In September 2025, the ASC announced the launch of a virtual innovation hub called 'The Park', which is a six-month program designed to connect technology companies with Australia's sports sector. The initiative focuses on five foundational challenges which include, harnessing data, AI and machine learning; next-generation wearables; digital twin technologies; brain performance innovation; and environmental sustainability in sport. The inaugural intake of five startups was announced in December 2025.

In March 2026, the ASC, together with the Commonwealth Scientific and Industrial Research Organisation (CSIRO), launched two world-leading artificial intelligence (AI) guidelines. The guidelines are designed to help those involved in sport, from grassroots to high performance, use AI safely, responsibly and effectively, while also providing a national strategy for how sport can harness its potential.

In October 2025, the ASC hosted the virtual Sports Technology and Applied Research Symposium (STARS). STARS is an annual forum and brings together sport and exercise researchers, technologists and sport industry professionals from across Australia and the world to share ideas that can drive innovation in their fields.

In March 2026 the ASC, together with the Commonwealth Scientific and Industrial Research Organisation (CSIRO), launched two world-leading artificial intelligence (AI) guidelines. The guidelines are designed to help those involved in sport, from grassroots to high performance, use AI safely, responsibly and effectively, while also providing a national strategy for how sport can harness its potential.

Canberra Business Locations



Tasmania's lifestyle sport sector, including trail running, mountain biking, wilderness recreation and adventure tourism, presents a first-mover opportunity for geographically based sports technology innovation that few other Australian markets can replicate. The ASTN Sportstech Tasmania node is explicitly designed to develop this opportunity.

Tasmania

Tasmania (TAS) remains a nascent sportstech market, with only three established sportstech companies identified, representing 0.3% of the national sector. However, FY2026 marks a significant inflection point, with systematic ecosystem development now underway that positions the state for meaningful growth over the next three to five years.

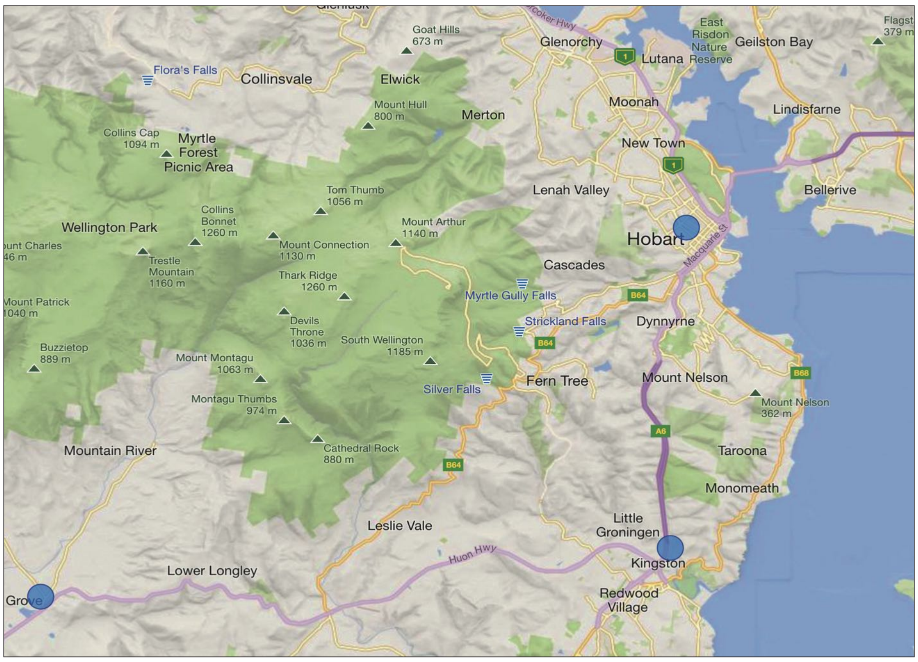
Tasmania is home to Bulk Nutrients, one of Australia's leading sports nutrition companies and the state's most prominent sportstech brand. The Hobart Hurricanes – one of eight founding teams in the Big Bash League – have been Tasmania's standard-bearer in national professional sport for over a decade and remains one of the state's most recognised sporting identities.

The emergence of two new professional sports clubs is creating new opportunities for growth. The Tasmanian JackJumpers, who joined the NBL in 2021, have demonstrated extraordinary community traction, consistently selling out MyState Bank Arena's 4,340-seat basketball configuration in a greater Hobart population of 250,000. The Tasmanian Devils will join the AFL as the 19th team in 2028, already boasting over 200,000 members across a state of 575,000 people. A A$1.13 billion, 23,000-seat stadium at Macquarie Point in Hobart is expected to be completed for the 2031 AFL season, alongside a A$130 million redevelopment of UTAS Stadium in Launceston. These investments are creating the demand conditions for sports technology procurement and innovation that Tasmania has previously lacked.

In parallel, ASTN has formalised its first Tasmanian node through a partnership between Sportstech Tasmania and TasICT, Tasmania's ICT industry peak body, as the industry anchor. The initiative is in active discussion with the University of Tasmania as its research partner, with the aim of developing an open innovation platform connecting sport participation, health outcomes, safety and the natural environment. With a roundtable in Hobart planned for late 2026, the three partner organisations are looking to activate industries adjacent to sportstech in its first public engagement with the sector.

Tasmania's lifestyle sport sector, including trail running, mountain biking, wilderness recreation and adventure tourism, presents a first-mover opportunity for geographically based sports technology innovation that few other Australian markets can replicate. The ASTN Sportstech Tasmania node is explicitly designed to develop this opportunity.

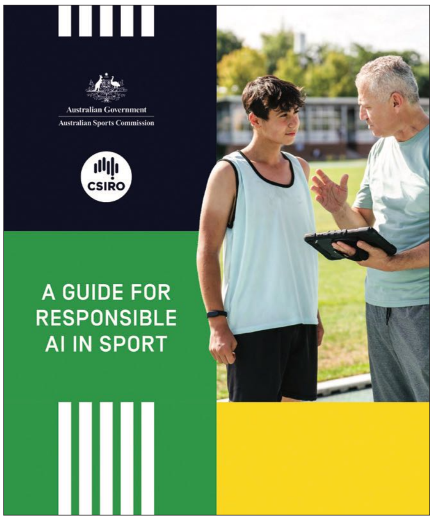
Hobart Business Locations

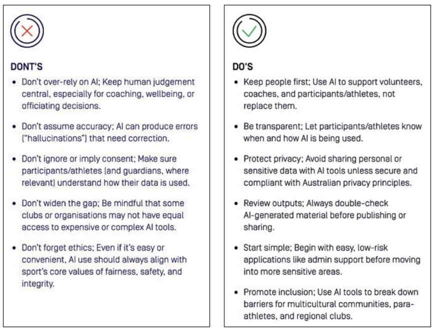


7. EMERGING SPORTSTECH THEMES

These 10 emerging themes are shaping the future of sportstech and informing ASTN's strategic direction, reflecting a landscape influenced by technological innovation and societal change.

As part of its commitment to supporting sector growth and innovation, ASTN continues to monitor these trends and assess their relevance and impact on the business of sport.





DONT'S

- Don't over-rely on AI; Keep human judgement central, especially for coaching, wellbeing, or officiating decisions.
- Don't assume accuracy; AI can produce errors ("hallucinations") that need correction.
- Don't ignore or imply consent; Make sure participants/athletes (and guardians, where relevant) understand how their data is used.
- Don't widen the gap; Be mindful that some clubs or organisations may not have equal access to expensive or complex AI tools.
- Don't forget ethics; Even if it's easy or convenient, AI use should always align with sport's core values of fairness, safety, and integrity.

DO'S

- Keep people first; Use AI to support volunteers, coaches, and participants/athletes, not replace them.
- Be transparent; Let participants/athletes know when and how AI is being used.
- Protect privacy; Avoid sharing personal or sensitive data with AI tools unless secure and compliant with Australian privacy principles.
- Review outputs; Always double-check AI-generated material before publishing or sharing.
- Start simple; Begin with easy, low-risk applications like admin support before moving into more sensitive areas.
- Promote inclusion; Use AI tools to break down barriers for multicultural communities, para-athletes, and regional clubs.

Organisations are encouraged to build AI capability, adopt national and international standards, as well as foster a culture of trust, learning and transparency so that AI strengthens, rather than undermines, the values and integrity of sport.

Theme 1: Artificial Intelligence in Sport

Artificial Intelligence (AI) is changing the way professional sport monitors athletes, personalises fan engagement, and measures marketing and sponsorship performance in real-time. From big data analytics and clustering, image recognition and natural language processing to workflow automation, opportunities extend beyond leagues and clubs to content-driven business models as athletes seek to monetise engagement with fans and sponsors directly.
In addition, grassroots sports are looking to simplify processes and provide improved guidance to volunteers via agentic AI.

As sport continues to trial and implement new technology, the Australian Sports Commission (ASC) is helping to lead the way in responsible use of AI.[23] According to the ASC guidelines, AI in sport should be used to enhance participation, performance and integrity while safeguarding human values such as fairness, inclusion, safety and wellbeing. This keeps people at the centre of AI, by supporting and not replacing coaches, officials and volunteers. Strong governance and risk management are essential with final decisions always made by accountable humans. Accordingly, organisations need to assess risks before adopting AI, ensure clear roles and accountability, and establish processes for monitoring, continuous improvement and transparency. Critically, organisations need to understand how decisions are made and how data is managed, including providing clear, accessible explanations and opportunities to challenge outcomes.

The ASC guidelines highlight the importance of privacy and informed consent, particularly when handling sensitive data such as biometrics or health information. To avoid bias and widening inequality, AI systems should be accessible and equitable across both elite and grassroots sport. Finally, responsible use requires human oversight, regular review of AI outputs, and ethical awareness among all users. Organisations are encouraged to build AI capability, adopt national and international standards, as well as foster a culture of trust, learning and transparency so that AI strengthens, rather than undermines, the values and integrity of sport.

Theme 2: Active Living, Fitness and Wellness

With one in four sportstech businesses expanding into adjacent sectors, knowledge diffusion into fitness, wellness and health is now a tangible reality, not an abstract term. For some time, large consumer technology businesses have entered the fitness market with an increasing range of sports and fitness equipment now connected to wearable devices. Meanwhile, active living activities like walking, running or cycling mostly occur outside of organised sport – with participants tracking their movements and athletic progress. As the accuracy of wearable hardware devices and software analytics of apps improve, peer-to-peer networks, common-interest communities and AI-powered tools see the growth of the 'quantified-self' by using technology to track and analyse personal data. With non-invasive sensor capability on the rise, the mapping of body functions, movement tracking and performance optimisation are no longer limited to elite and professional athletes. From biometric tests, nutrition and hydration information to sleep and recovery, athletes of all abilities can turn information into insights as they seek to improve performance.

23. Australian Sports Commission (ASC). Guide for Responsible AI in Sport (2026) retrieved from https://www.ausport.gov.au/media-centre/news/australian-sports-commission launches-world-leading-ai-in-sport-guidelines

Theme 3: Virtual Sports, Esports and Gaming

The convergence of sport, sponsorship and gaming in virtual environments is continuing to accelerate. Multi-gamer platforms such as Roblox are creating new opportunities for leagues, clubs and events to build and monetise interactive content models. Major events such as the Australian Open (AO) are increasing audience engagement through gaming experiences like AO Tennis Advantage.[24] At the same time, the National Rugby League (NRL) is providing immersive Rugby League gaming content through collaboration with gaming developers.[25]

These forms of engagement become even more important as the Australian Government continues to focus on protecting young Australians through world-first social media age restrictions.[26]

Theme 4: Sports Broadcasting and Smart Stadium Tech

Technologies deployed in smart stadiums range from biometrics and cashless concessions to merchandise and interactive in-stadium polling. A specific trend in stadium technology is the shift from clandestine surveillance to an opt-in, incentive-driven adoption models. At the same time, haptic display devices are enabling vision-impaired spectators to experience the excitement of live events in new and inclusive ways.

While the implementation of second-screen experiences varies according to venue capabilities and engagement strategies, the rise of cloud-based production and automation is creating new opportunities for content rights holders, venue operators and event organisers to personalise in-venue, at-home and fan-zone experiences. However, content rights holders must minimise the risk of fragmentation, as fans value a consistent and reliable experience that prevents external linking and provides features such as single sign-on, locally relevant experiences and destination-based features.

Theme 5: Smart Tech for Paralympics and Mobility

Paralympic Classification establishes the framework to “promote fair and meaningful competition by minimising the impact of athletes’ impairments on the outcome of competition”.[27] Classification is essential to ensure that the competition outcome is determined by factors other than impairment. Smart measurement technologies are expected to assist in evaluating impaired muscle power, impaired passive range of motion or coordination impairments. Sensor-based assessments, image recognition or biomechanic motion detection are technologies that are promising not only to assist classifiers in para sports but also provide valuable insights to people living with disabilities. Aids and equipment derived from para sports are known to improve and support athletes of all abilities.

Australian Open (AO) on Roblox

NRL Gaming Experience

As the accuracy of wearable hardware devices and software analytics of apps improve, peer-to-peer networks, common-interest communities and AI-powered tools see the growth of the ‘quantified-self’ by using technology to track and analyse personal data.

24. AO Tennis Adventure retrieved from https://www.roblox.com/games/11268121492/AO-Tennis-Adventure
25. NRL Rugby League 26 retrieved from https://bigant.com
26. eSafety Commissioner retrieved from https://www.esafety.gov.au/about-us/industry-regulation/social-media-age-restrictions
27. International Paralympic Committee retrieved from https://www.paralympic.org/classification

The focus must shift from representation to leadership for women in sportstech, enabling more women to become founders, investors and decision-makers shaping the sector's future.

Theme 6: **Environment, Society and Governance**

The benefits of sport are far-reaching, delivering positive social, economic and environmental outcomes. However, assessing environmental impacts (resource usage, carbon emissions and waste), social factors (ethical sourcing, community relations, privacy and data security) and governance practices (transparency, ethics and oversight) requires significant effort to quantify an organisation's impact.

Technology can assist through self-assessment tools, benchmarking and alignment with established quality frameworks. Accordingly, ASTN supports and promotes a sportstech quality framework that embeds quality assurance, functionality and validity, prioritises user experience, and standardises data management and interoperability to help ensure compliance, privacy and safety across all levels of sport.

Theme 7: **Quantum Technology, Big Data, Privacy and Security**

Quantum-enhanced anti-doping detection has emerged as a key area of development. Due to similarities in chemical structure and low concentrations, detecting certain performance-enhancing drugs in the human body remains difficult. Therefore, quantum sensors that combine optics, biotechnology and photonics are thought to improve accuracy and the sensitivity of detection.[28] At the same time, quantum computing including its parallel computation capability is viewed to "open up valuable avenues through which to handle the rich data complexity of the sports ecosystem".[29] Accordingly, quantum technology is also seen as a tool to be applied in sports analytics, training and tactics analysis, as well as athlete development and logistical optimisation of major events.

Theme 8: **Women in Sportstech**

The next phase for women in sportstech is about converting early momentum into lasting structural change. Over the past year, female founder participation in ASTN's startup and innovation programs has grown beyond double the sector average, a strong signal that our targeted support model is working. However, the real opportunity lies ahead in ensuring this pipeline doesn't stall as founders progress from early-stage support into accelerators, scale-ups, and leadership positions across the sector.

The focus must shift from representation to leadership for women in sportstech, enabling more women to become founders, investors and decision-makers shaping the sector's future. This means continued investment in advocating and showcasing the opportunities within the sector, and strengthening visibility for women-led ventures, alongside a sharper focus on the structural barriers that still prevent many women founders from scaling.

28. Quantum Australia retrieved from https://www.quantum-australia.com/use-cases/enhancing-anti-doping-detection-with-quantum-technology-for-future-sports-events

29. Torgler. Big Data, Artificial Intelligence, and Quantum Computing in Sports. In: Schmidt. (eds) 21st Century Sports. Future of Business and Finance. Springer, Cham. https://doi.org/10.1007/978-3-031-38981-8_10

Theme 9: Sport as an Investment Class

Over the last two to three years, the sports industry has attracted an increasing flow of capital, which in turn has been a key driver of growth in the global sportstech sector. Sport is now being considered as a stand-alone asset class by investment banks and private equity firms, which are playing a more active role in mergers, acquisitions and financing of teams, leagues (both new and existing), as well as sportstech companies. The global sportstech market hit unprecedented levels of mergers and acquisitions and capital raising activity in the past year. Additional factors have been driven by strong investment involving corporate venture capital, syndicated investments by athletes, as well as commercial accelerators and leagues or clubs investing globally to attract talent into their portfolios.

Theme 10: International Trade

ASTN's vast international relationships and strong ties with sportstech markets in North America and Europe have been key destinations for Australian businesses who endeavour to access global markets. At the same time, the Australian Trade and Investment Commission (Austrade), Australia's national trade and investment promotion agency, identifies strong growth opportunities across high-potential regions, particularly Southeast Asia and India. These markets are experiencing rapid economic expansion, rising digital adoption, and increasing demand for advanced technologies. Through the Trade Diversification Network, at the heart of the Accessing New Markets Initiative (ANMI) – a A$50 million program designed to help Australian exporters diversify into new markets and capture growth opportunities – Austrade is actively supporting Australian businesses to engage in these markets as part of a broader strategy to expand and diversify exports.

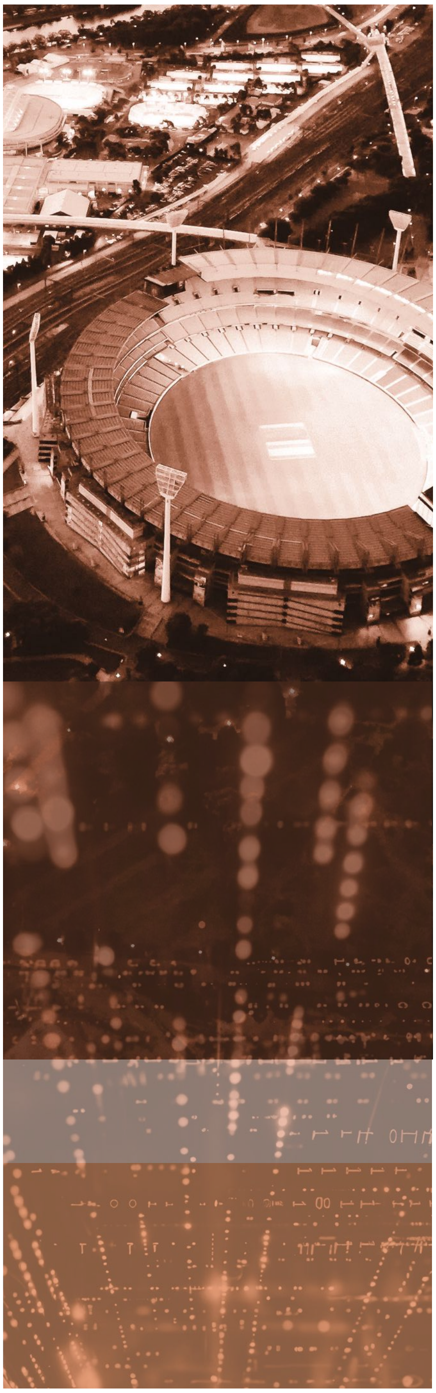
Accordingly, Austrade is actively supporting sportstech collaboration and export growth through targeted programs and market initiatives in partnership with ASTN, which includes:

- **Southeast Asia market entry:** In-market programs in Singapore to help Australian sportstech companies build connections, access regional insights, and engage directly with investors, sports organisations, and technology leaders across APAC.
- **India sportstech expansion:** Companies are supported through initiatives like the India Tech Export Catalyst, helping businesses develop market entry strategies, connect with partners, and adapt solutions for one of the world's fastest-growing sports markets.

"By pairing Austrade's global network, practical market intelligence and trade services with the capabilities of peak industry bodies, ANMI will deliver support with enduring outcomes to help businesses diversify."

Dr Paul Grimes, Chief Executive Officer of Austrade

METHODOLOGY



To quantify established businesses, industry revenue and industry employment in the sportstech sector, ASTN employed a bottom-up methodology. ASTN has used a combination of publicly available data, as well as estimates of employment and revenue per head of employment to calculate the economic contributions.

All research activities for the ASTN Sports Innovation Report 2026 were completed by May 2026.

Company Revenue and Employment Estimates:

ASTN's original mandate and mission focused on developing 'Australian-inspired' sports technologies, and this also provided the foundation for the quantification of the sportstech sector.

- All revenues and employment (both domestic and international) of Australian headquartered businesses were included for the purposes of market sizing.
- Where Australian businesses have been acquired by international entities and headquarters relocated out of Australia, only Australian revenues and employment have been included.
- International sports innovation businesses with Australian operations were also included in the market sizing estimates.
- For businesses servicing multiple industries an estimated pro-rata of sports-related revenue and employment was calculated.

Data Adjustments from 2025 Report:

Through FY2026, ASTN's research team has uncovered a net of 67 sportstech businesses that were operating in Australia in FY2025 or earlier that were not captured in previous datasets. These businesses were identified through ASTN programs and events, supplemented by secondary research conducted during FY2026.

As a result, FY2025 annual revenue, employment, and established business figures have been revised to ensure consistency in annual growth comparisons and trend analysis.

These adjustments are estimated as follows for FY2025:

- A$6.10 billion annual revenue (from A$5.65 billion in previous report)
- 19,356 in employment (from 17,928 in previous report)
- 908 established companies (from 841 in previous report)

Sectors Excluded from Calculations

- The Australian sportstech and innovation market size excludes the sports horse racing, wagering and betting industry which is estimated to be A$7.5 billion per annum in FY2025, employing close to 4,700 people (IBISWorld). This sector relies heavily on sports data analytics as well as sports broadcasting and media talent in procuring services to the market.
- Professional services to the sports innovation industry such as digital, architectural, engineering, product design, leisure, planning, strategic advice and large-scale ticketing has also been excluded for the purposes of market sizing. It is estimated that this professional services sector employs at least another 3,000 people across Australia's sports economy.

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Craig Hill is a leading sports technology specialist in Australia, currently engaged as Sportstech Startup Advisor and Senior Industry Analyst at Australian Sports Technologies Network. Craig co-founded the Australian Sports Technologies Network (ASTN) in 2012 and was inaugural Executive Director until 2017. He led the development and implementation of a suite of programs to support the development of the sector including, international trade missions, startup accelerator programs, conferences and international partnerships.

Dr Martin Schlegel
Executive Chair and Board Member, ASTN

Martin has 25 years' experience in the sports and recreation, construction and plastics specialty chemicals industry in the areas of product development, process engineering and research and development commercialisation. As a Consulting Principal he has been providing advice in the sport and recreation industry across Australia, Europe and the USA. Previously, Martin worked in various positions in the USA and Australasia including management roles in business information technology, quality management engineering and business M&A. His ASTN work focuses on startup programs, trade missions and global partnerships with other clusters of innovation.

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Amy has built a diverse career spanning government, international development, NGOs, and the corporate sector. For the past decade, she has focused her talents on the sportstech industry, collaborating extensively with Australia's largest sporting leagues and governing bodies to deliver digital solutions sports integrity, governance, and operations. As the Chief Operating Officer of ASTN, Amy now leads strategic operations and programs at both ASTN and the Australian Sports Innovation Centre of Excellence (ASICE), strengthening Australia's place as a leader in sports technology and innovation.

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Since 2023 Regina has supported the ASTN leadership team in national and international industry research and analysis as well as digital development initiatives. In this time, she has developed an intimate knowledge of the sportstech sector and its key players. Passionate about innovation, global collaboration, partnerships, and diplomacy, Regina has cultivated a robust network of professional connections across startups, corporates, academia, industry bodies and government agencies worldwide. Regina is a scholarship student and recently graduated with a Bachelor of Business, majoring in Business Analytics and Analysis from Swinburne University.

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Global Ambassdor

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George Gregan (AM) is respected throughout the rugby world for his skill, tenacity, sportsmanship and leadership ability. He is a Rugby World Cup Champion and holds a Medal of the Order of Australia for his service to Rugby Union Football and as the Captain of the Wallabies. He has a wealth of achievements under his belt and is best known for leading the ACT Brumbies, Australian Wallabies and Suntory Sungoliath in Japan to multiple victories over the years. Off the field, Gregan co-founded PTP Fitness over 12 years ago, developing strength and conditioning products and programs to help people move smarter and ultimately perform better in whatever fitness or sporting goals they set out to achieve.

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