

Technology in Youth Sports 2026

THE INDUSTRY'S BIGGEST TRENDS IN 2026



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Welcome

A year ago, Native Frame and Reeplayr partnered to publish the inaugural edition of this report as a first attempt to map the technology landscape across youth and recreational sports. By participation and household spend, youth sports rivals professional tiers, yet remains structurally underserved by a fragmented ecosystem built around them. Our joint vantage point – Reeplayr's position at the point of capture and Native Frame's at the infrastructure layer – gave us a composite view of a value chain that few get to see end to end.

In April 2026, Sports Business Journal called youth sports streaming a \$10 billion business. Private equity capital has continued flowing into clubs, tournament operators, and the platforms that serve them, accelerating a dynamic in which standalone tools are being absorbed into larger, vertically integrated platforms. Incumbents such as GameChanger and NFHS Network, alongside a widening field of challengers, have materially redefined the youth broadcast, moving the category from a patchwork of volunteer produced streams to a hardened media product. The 2025 edition of this report described livestreaming as "in an early growth phase." That phase appears to be giving way to the next.

Against that backdrop, we approached this year's edition with some changes in scope, informed by where we saw last year's report fall short, and by the real questions our industry partners were asking us. Established institutions like Aspen Institute's Project Play, the National Federation of State High School Associations, and the Sports & Fitness Industry Association already produce rigorous, longitudinal research on participation, household expenditure, coaching dynamics, and broader cultural forces. This report is not an attempt to duplicate that work, but to complement it with a view of the technology stack that increasingly shapes participation, athlete experience, community building, and revenue across youth sports.

Specifically, we aimed to do three things: deepen our view of underrepresented segments in existing research, including organizations serving predominantly female participants and smaller, non-marquee sports, establish a baseline for current Artificial Intelligence (AI) adoption and stated interest across the landscape, and test whether attitudes, challenges, and behaviors vary systematically by sport, program type, and/or family economics.

While what follows is a presentation of data, we remember that every data point is a person making real choices about time, money, and what they want for their sport. We are grateful to every parent, coach, athlete, and administrator who contributed their insight, and we hope this sparks ideas worth chasing across the industry.

–Kate and Orhan

Key Findings

Commitment and scale, not family wealth, drive the market

- Organization size is the single strongest predictor of family spend with travel distance close behind. The further teams travel, the more families spend, climbing from ~\$1,550 locally to ~\$6,400 nationally and internationally.
- Technology adoption follows the same logic. The number of tools an organization uses tracks with its size and how much it spends, but barely with family wealth. Adoption reflects commitment, not affluence.
- Family wealth is a negligible predictor across the board. An organization's ambition and scale consistently outweigh its families' means in explaining spend, technology, and livestreaming adoption.

Technology demand is widespread, and tools varies by sport

- Appetite for streaming and technology is broad, not sport specific. Adoption and feature interest show no statistically significant variation by sport.
- The variation is in which tools fit each game. Sports gravitate to the technology that matches their venue, audience, and competitive shape - swimming toward measurement and technique tools, wrestling toward recruitment and wearables, action sports toward automated capture, and gymnastics toward social media.
- Optimism is broad as well. About 77% of organizations across sports see themselves as advancing on technology, reinforcing that receptiveness isn't concentrated in particular sports.

Livestreaming is proven and embraced. Ease of use is the barrier.

- Adoption has become mainstream and delivers. Roughly 30% of organizations now stream, and 77% of them say it met or exceeded their goal, with only 4% disappointed.
- Demand far outpaces doubt. Among non-streamers, about two thirds are actively planning or considering it, and only 3% have ruled it out. Over half perceive streaming to require a high level of technical skill.
- The barrier is friction, not value. Dissatisfaction and hesitation center on setup complexity, staffing, and reliability, so the lever for growth is ease of use over advanced streaming features.

Streaming runs on free platforms, with specialist tools layered on top

- Livestream usage is anchored in free social media tools. YouTube (75%) and Facebook Live (60%) are near universal across every sport, size, and budget — the foundation almost everyone streams on.
- Above that base, the specialist field is fragmented. Sports focused platforms such as GameChanger, Hudl, FloSports, and NFHS Network reach a meaningful slice of the market, roughly 20 to 30 percent, but remain far behind the reach of social media.
- Stack breadth tracks closely with spend. The number of streaming platforms an organization runs correlates strongly with family spend and organization size.

Smaller sports aren't behind, and sometimes outpace

- Spending and adoption between “The Big 4” (football, basketball, baseball/softball, soccer) and all other sports are statistically identical, with no meaningful difference in family spend, technology adoption, or livestreaming use.
- Action Sports respondents reported using an average of 4.0 tech categories — the highest of any sport in the survey — compared with an average of 3.4 categories across all other sports.
- Wrestling, Hockey, Lacrosse, and Martial Arts over-index on individual athlete technology such as performance tracking and wearables, at 38% versus 25% for The Big 4.

Methodology

This year's Trends in Youth Sports survey reached 559 respondents fielded between May 6 and May 17, 2026. The sample spans four audience segments: parents and guardians of youth athletes under 18 (n=335), athletic directors, owners, board members, and organization managers (n=85), coaches, referees, and instructors (n=83), and current collegiate athletes (n=56). The survey was fielded through Centiment, an online research panel that provides targeted consumer samples for academic and market research.

The most significant methodological enhancement this year is the introduction of quotas to correct for overrepresentation we saw last year. First, we capped responses for the four most popular U.S. youth sports (basketball, baseball/softball, American football, and soccer) at 50 respondents each. This ensured that emerging and niche sports (action sports, racquet sports, wrestling, martial arts, equestrian sports, and others) had enough sample to surface their distinct patterns rather than being absorbed into mainstream averages.

Second, we established regional quotas across the five U.S. census regions, producing a balanced distribution of 90 to 125 respondents per region. The 2025 sample skewed heavily toward the South (35%) and underweighted the West (7%), which limited the reliability of regional cuts. This year's quota balances representation across the Northeast, South, Midwest, and West, producing more reliable geographic comparisons.

The survey used skip logic to separate respondents into two cohorts based on their organization's current livestreaming status. Respondents from organizations that already livestream were routed through questions about their existing platforms, camera setups, AI feature preferences, and whether livestreaming has delivered on their goals. Respondents from organizations that do not currently livestream were instead routed through questions about barriers to adoption, implementation concerns, and the conditions that would prompt them to start. Because these question sets are mutually exclusive, response counts for these questions are lower than the full sample of 559 respondents.

The survey used a mix of single-select, multi-select, and ranking question formats. Single-select questions, where respondents chose one answer from a list, produce percentages that sum to 100% across response options. Multi-select questions, where respondents could choose multiple answers, produce percentages that often exceed 100% in total because each respondent can be counted in more than one response category. Ranking questions asked respondents to order a list of options from most to least relevant, with results reported as mean ranks.

Findings presented across segments should be read directionally rather than as significance-tested differences, particularly for smaller subgroups such as collegiate athletes and within sport breakouts where sample sizes fall below 20.

01

Who We Surveyed

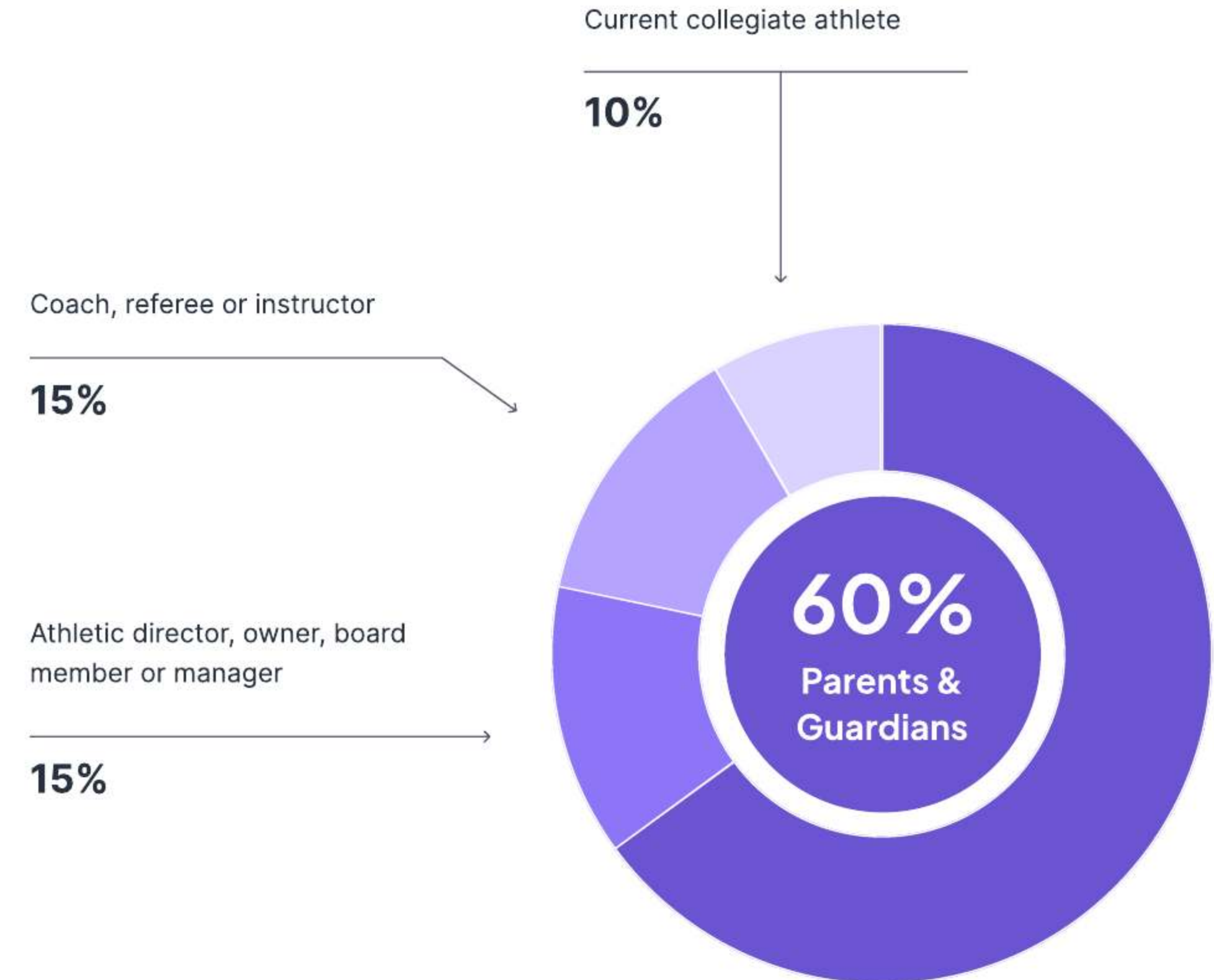
A blend of parents,
athletes, coaches,
and program operators
across the US and 17
different sports



Sample tilts towards parents

Parents and guardians make up 60% of respondents, and the other three cohorts together make up the remaining 40%. Because parents fund participation, select programs, and define the addressable audience, a sample weighted toward this cohort is a fair reflection of the market. Nonetheless, there are a few caveats worth noting:

- Parent responses on technology and process represent their level of involvement and what's visible, and may not reflect the full operational view.
- Leadership skews optimistic. Athletic Directors (ADs) and owners report higher adoption and intent than coaches do, so their answers likely overstate reality.
- Coaches work closest to execution, so may capture truer operational signal for practical implementation.



Small and School Based

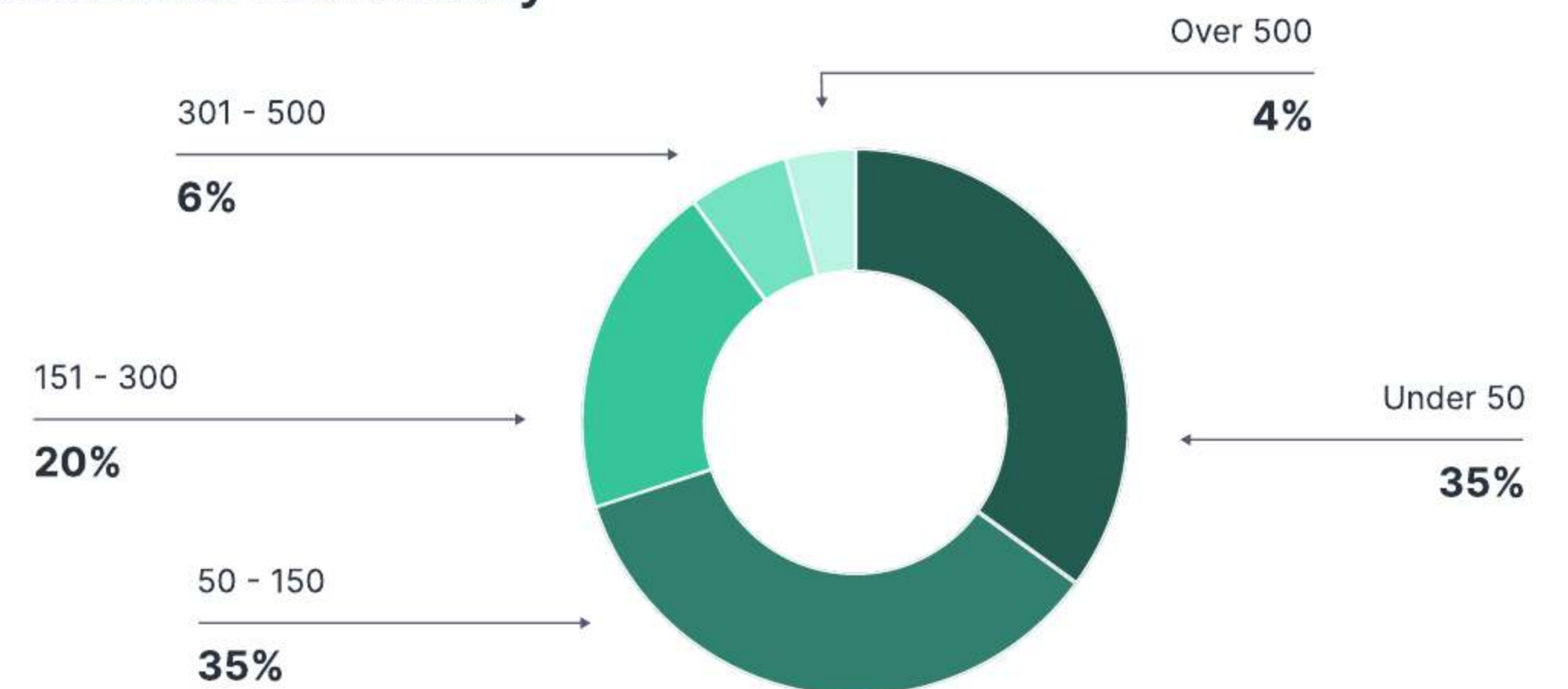
Schools anchor the market. Public school athletics alone account for 43% of organizations, and adding private schools brings the institutional share to nearly six in ten. Layer in recreation leagues at 18%, and roughly three quarters of the field is school or community based. Commercial operators—clubs, facilities, and tournament organizers—make up a smaller, more specialized remainder.

Overall, organizations run small. Seven in ten serve 150 athletes or fewer, split almost evenly between those under 50 and those between 50 and 150. Only about one in ten serves more than 300. The market is not a handful of large enterprises, but a long tail of community scale programs, a structure that shapes budgets, buying power, and how technology decisions get made.

Organization Type



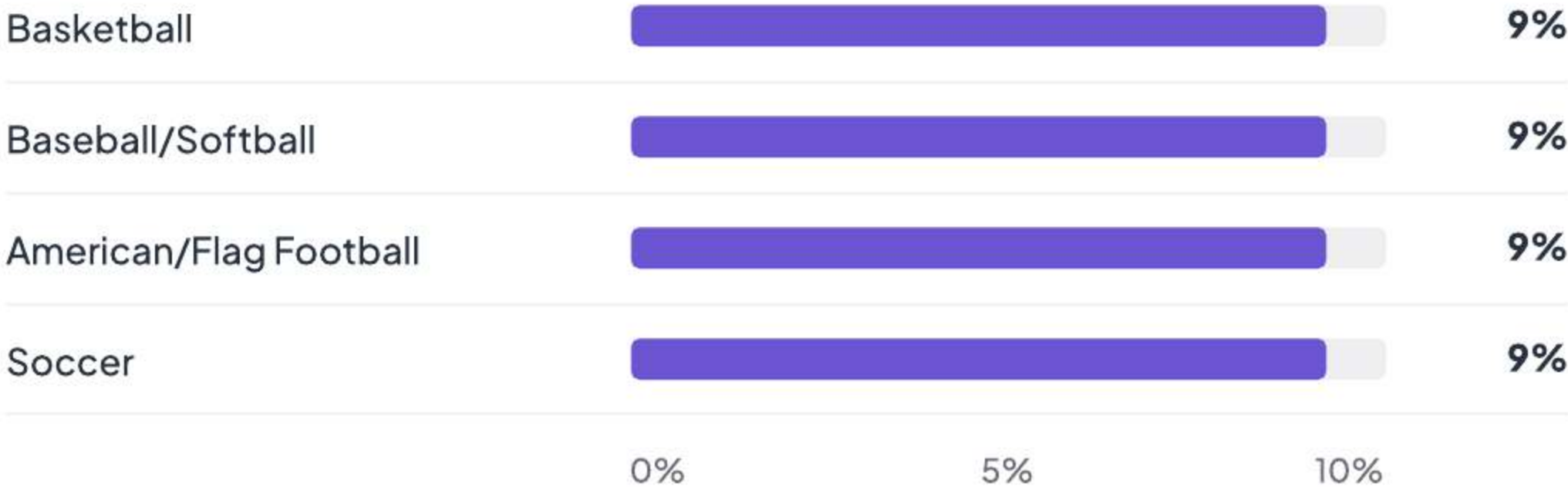
Athletes Served Annually



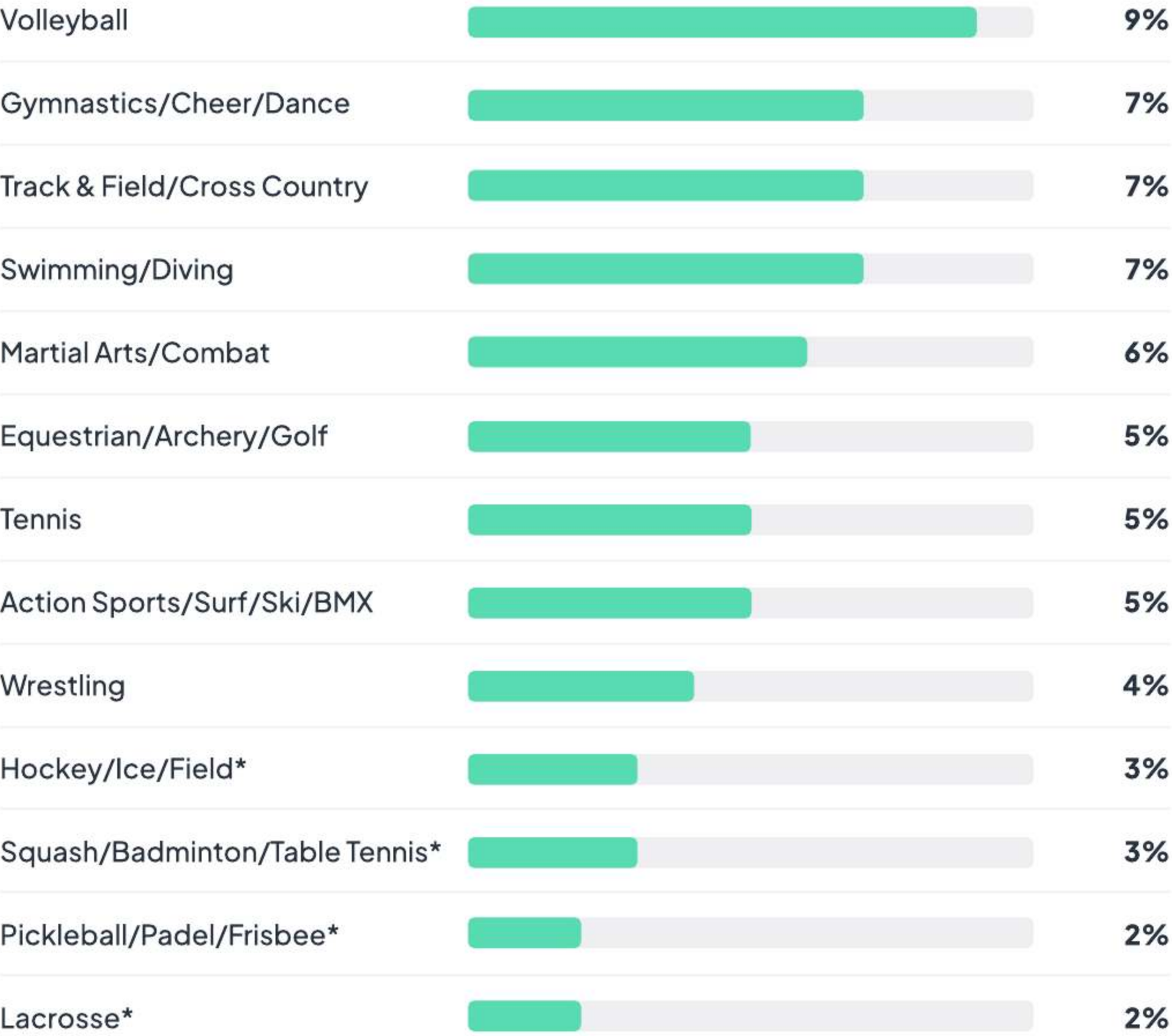
Quotas allowed broader representation

We capped The Big Four (basketball, baseball/softball, football, soccer) at 50 respondents each, deliberately trading statistical depth on the largest sports for analytical breadth across smaller, traditionally underrepresented ones. The trade-off shows clearly in the results. Five sports landed at 33+ respondents, enough for reasonably confident comparisons. Others support directional findings but warrant some tolerance. The bottom four — hockey, racquet sports, emerging sports, and lacrosse — fall below 20 and should be read as exploratory.

The Big Four



The Long Tail

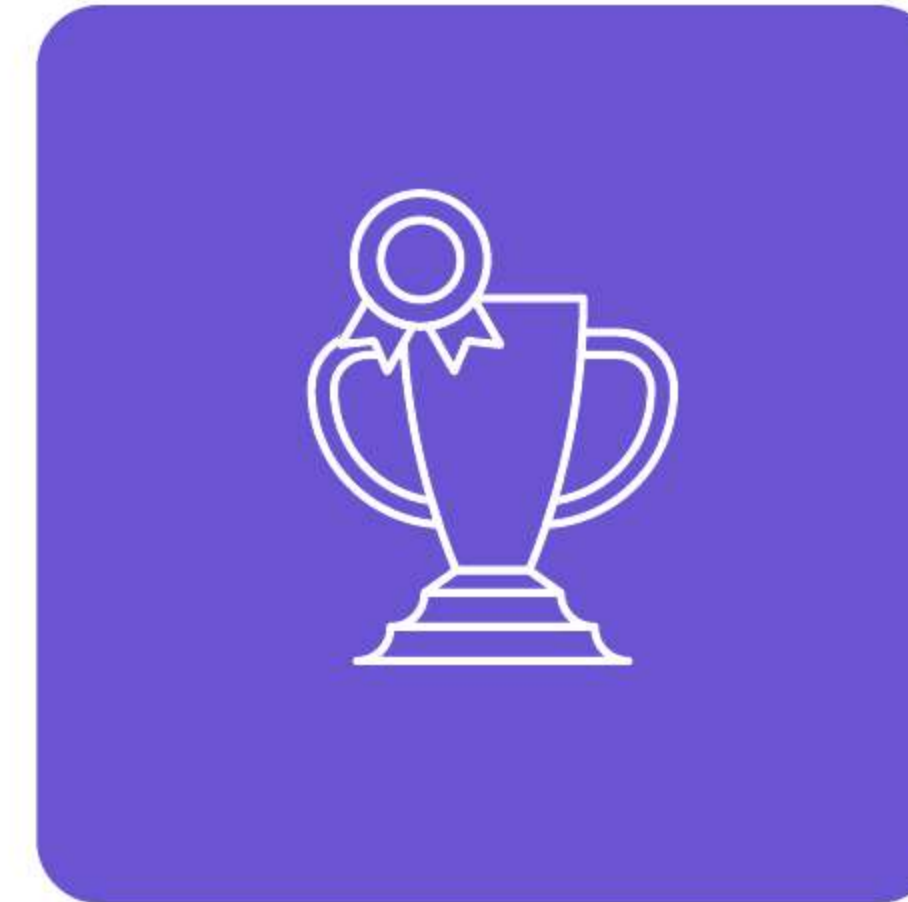


*Sample <20, Directional only

A note on sport categories

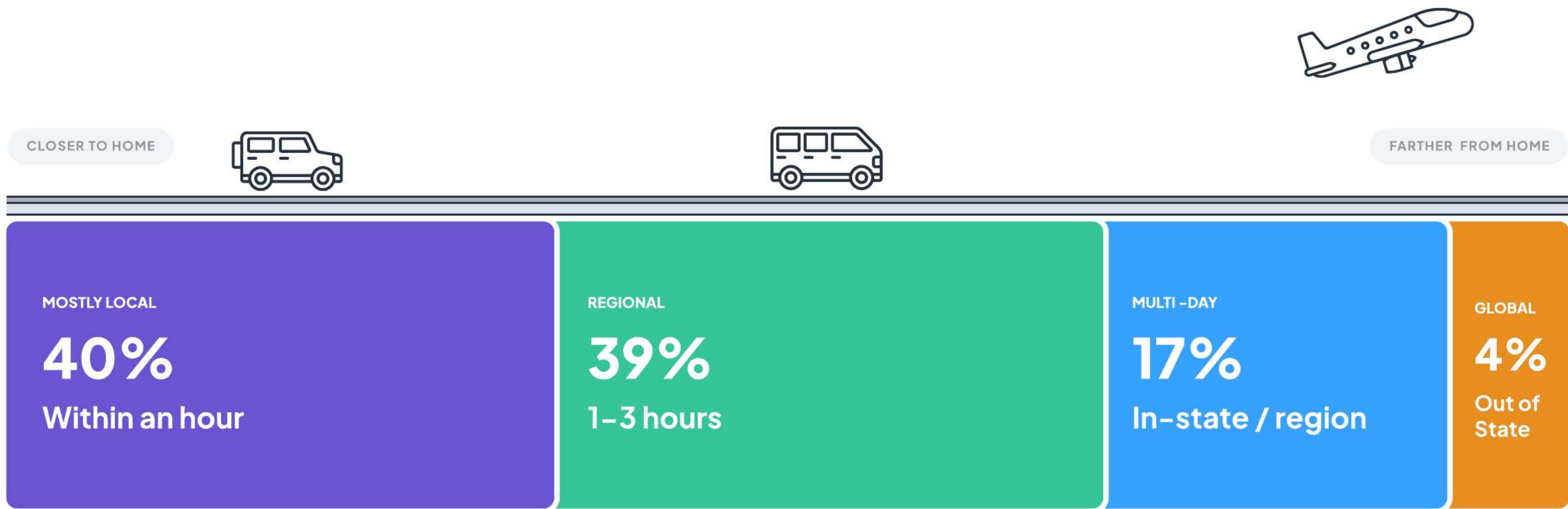
Throughout this report, sports are referred to by shorthand labels for readability. Each label maps to a broader category that respondents actually selected from in the survey. The shorthand and full categories used for each are as follows:

- **Football** — American Football (Flag/Tackle)
- **Soccer** — Soccer/Futbol
- **Baseball** — Baseball/Softball
- **Gymnastics** — Gymnastics/Cheerleading/Dance
- **Track & Field** — Track & Field/Cross Country
- **Swimming** — Swimming/Diving
- **Martial Arts** — Martial Arts/Combat Sports (Karate, Taekwondo, Jiu-Jitsu, Boxing, etc.)
- **Field Sports** — Individual Skill Sports (Equestrian, Archery, Fishing, Golf, Shooting Sports, etc.)
- **Action Sports** — Skateboarding, BMX, Snowboarding, Surfing, Skiing, etc.
- **Racquet Sports** — Badminton, Squash, Table Tennis, etc.
- **Emerging Sports** — Pickleball, Padel, Ultimate Frisbee, etc.
- **Hockey** — Hockey (Ice/Field)
- **Tennis, Basketball, Volleyball, Wrestling, Lacrosse** — used as labeled



Most athletes stay local

Travel in youth sports remains predominantly close to home. Roughly four in five organizations operate within a three hour radius, split evenly between local and regional competition. Multi-day travel applies to just 17% of organizations, and national or international travel is rare. This local skew partly reflects the sample, which leans toward public school athletics and recreation leagues rather than the club and travel circuit. The aggregate, however, masks meaningful variation by sport, with some disciplines routinely traveling far more than others, as the next view shows.



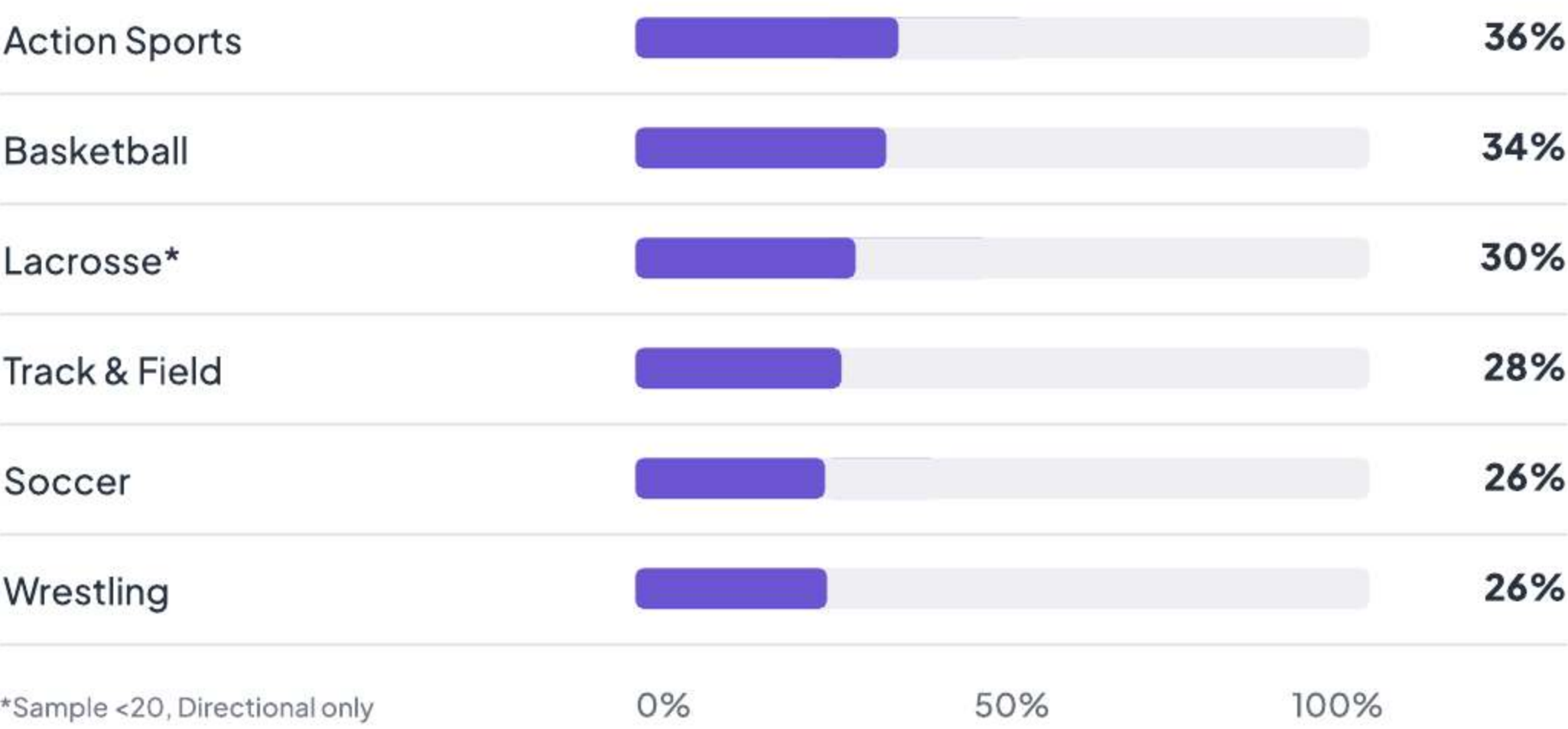
Travel footprint by sport

Travel intensity varies markedly by sport. Action sports lead sharply, reflecting a destination driven model where surfing, skiing, and snowboarding require travel to specific coastal or mountain venues. Wrestling and basketball follow. At the opposite end, swimming and gymnastics are overwhelmingly local, consistent with both their local community based formats and a sample that leans toward public school and recreation programs over traveling clubs.

ROAD WARRORS

16% Action Sports report routine national or international travel

Top Sports for Overnight Travel



02

The Economics of Youth Sports

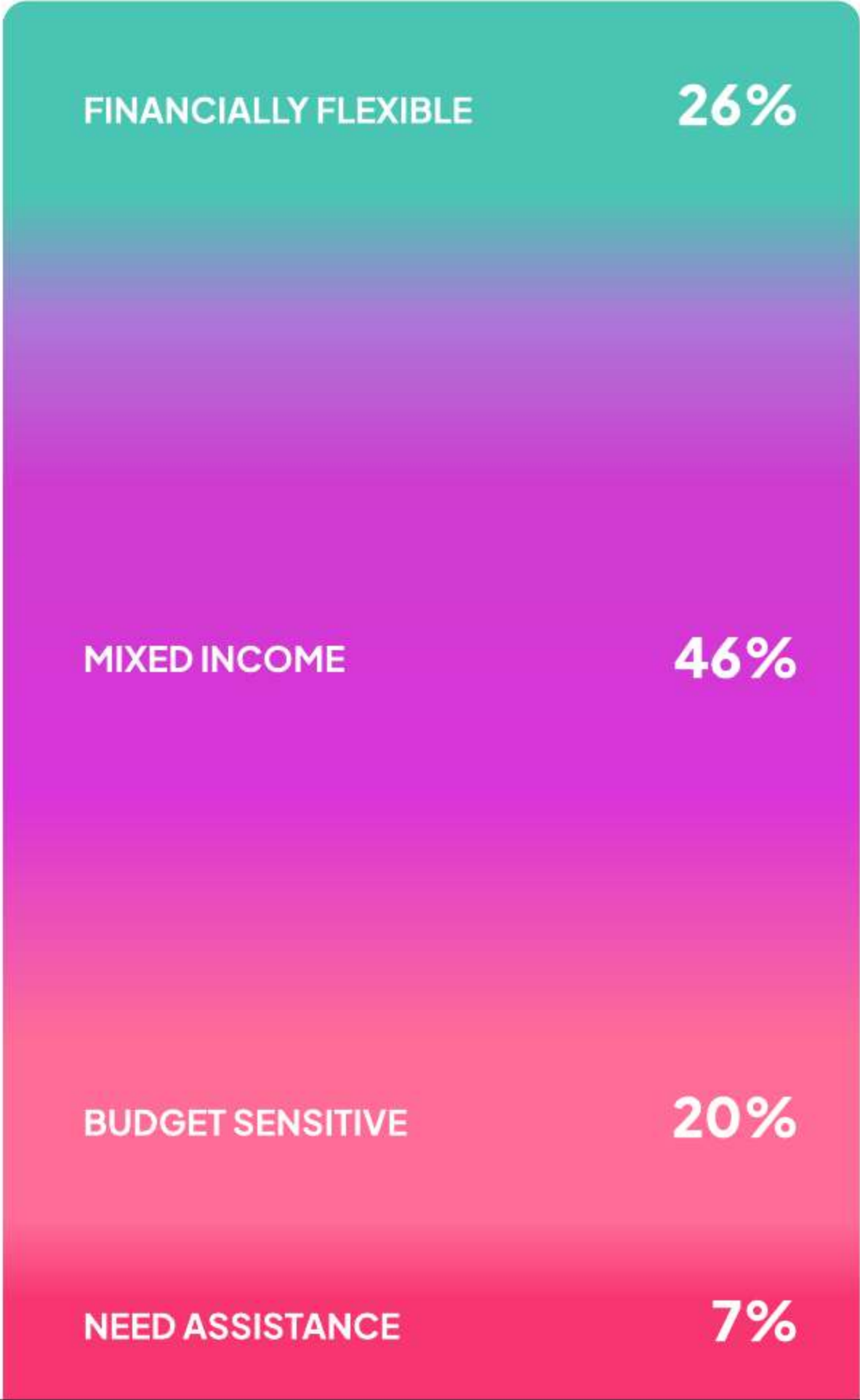
A look at how much families spend on youth sports, and factors that drive costs



Program type predicts the families served

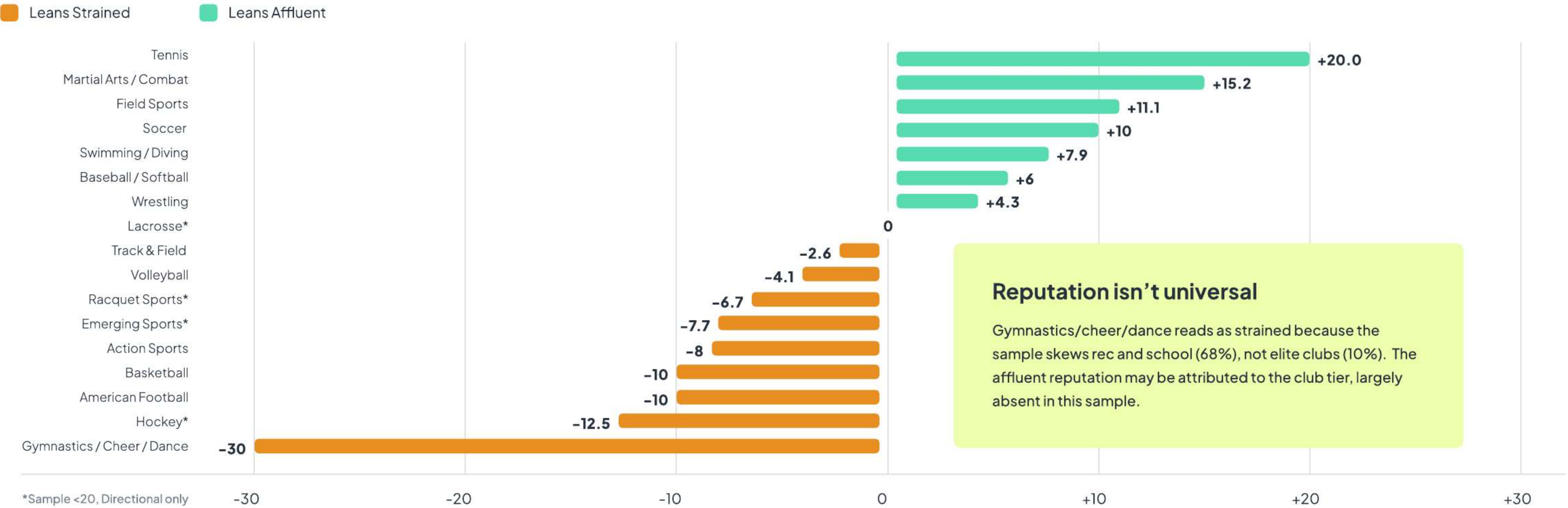
Organizations describe a financially heterogeneous family base, weighted toward the middle. A large share serves mixed economic profiles rather than a uniform tier, indicating that economic diversity within programs is the norm, not the exception. Roughly a quarter serve families with clear financial flexibility, while a comparable share serve families who must budget carefully (20%) or rely on assistance and scholarships (7%).

Beneath the average though, affluence varies systematically by organization type. Tournament organizers serve the most financially flexible base (56% vs. 26% average), fitting a pay-to-play model. Private schools follow (30%), and recreation leagues are most strained with just 17% financially flexible. The organization model predicts affluence, where open access formats serve the full economic range, and selective formats have a more wealthy concentration.



Net Affluence By Sport

The net affluence score measures whether a sport's families lean financially comfortable or stretched, calculated as the share of organizations reporting families with "financial flexibility" minus the share reporting families who "budget carefully or need assistance" (neutral "mixed" responses are excluded). A positive score means a sport skews affluent, a negative score means it skews strained, and the figure is in percentage points — so Tennis at +20 leans comfortable while Gymnastics at -30 leans stretched. Note that scores reflect respondents' general perception of all families in the organization, not necessarily their own.

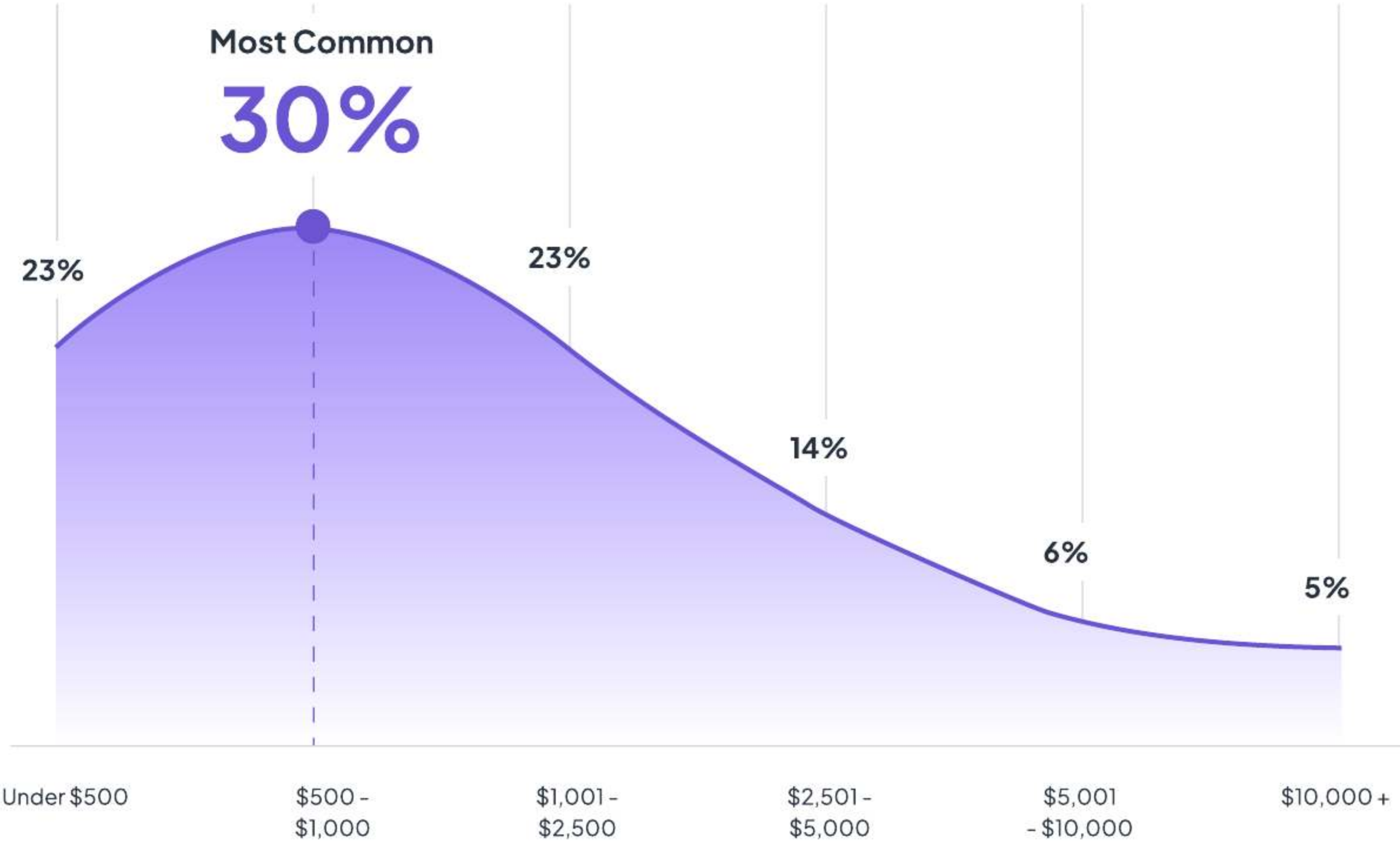


The Cost of Youth Sports

Taking into account equipment, fees, and travel, annual youth sports spending per child is bottom heavy. A majority of families (53%) spend under \$1,000 per child per year, and three quarters (76%) under \$2,500, with spending peaking in the \$500–\$1,000 band (30%).

Yet a premium tail persists, with roughly one in ten families spending above \$5,000 and nearly 5% exceeding \$10,000. This tail likely distorts public perception when media coverage tends to spotlight the \$10,000 outlier, not the typical family spending under \$1,000. At the same time, the overall picture smooths out sport to sport variation, as the next view breaks down.

Annual Spend Per Child

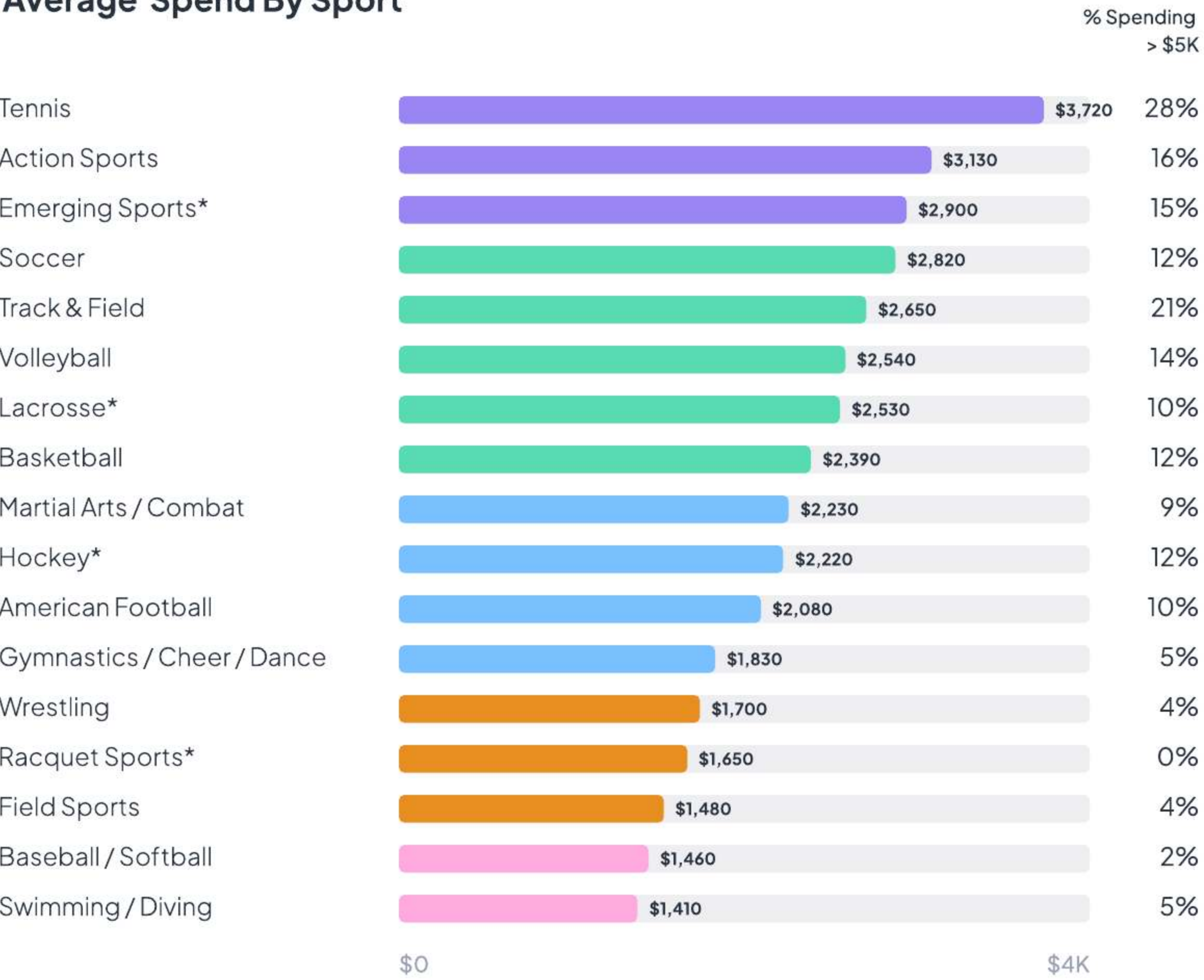


Sport sets cost, but travel drives it

Average annual spend per child varies more than twofold across sports, revealing a clear cost hierarchy beneath the modest overall average of roughly \$2,200. Tennis sits in a tier of its own at approximately \$3,720, with 44% of families spending \$2,500 or more. A high spend cluster follows, including action sports (~\$3,130), soccer (~\$2,820), and the emerging sports of pickleball and padel (~\$2,900), each drawing a disproportionate share of premium spenders. At the opposite end, swimming (~\$1,410), baseball/softball (~\$1,460), and individual skill sports (~\$1,480) are the most affordable, with few families exceeding \$2,500.

Yet sport itself is not the deepest driver of these differences. Many sports clustered at the high end are driven by travel costs. As the next view shows, how far a family travels predicts spend more reliably than any other factor.

Average Spend By Sport



*Sample <20, Directional only

Travel is the biggest predictor of spend

At the sport level, the link between cost and travel is moderate and full of exceptions. Wrestling travels far yet spends less, while tennis spends more and maintains a relatively local to regional footprint.

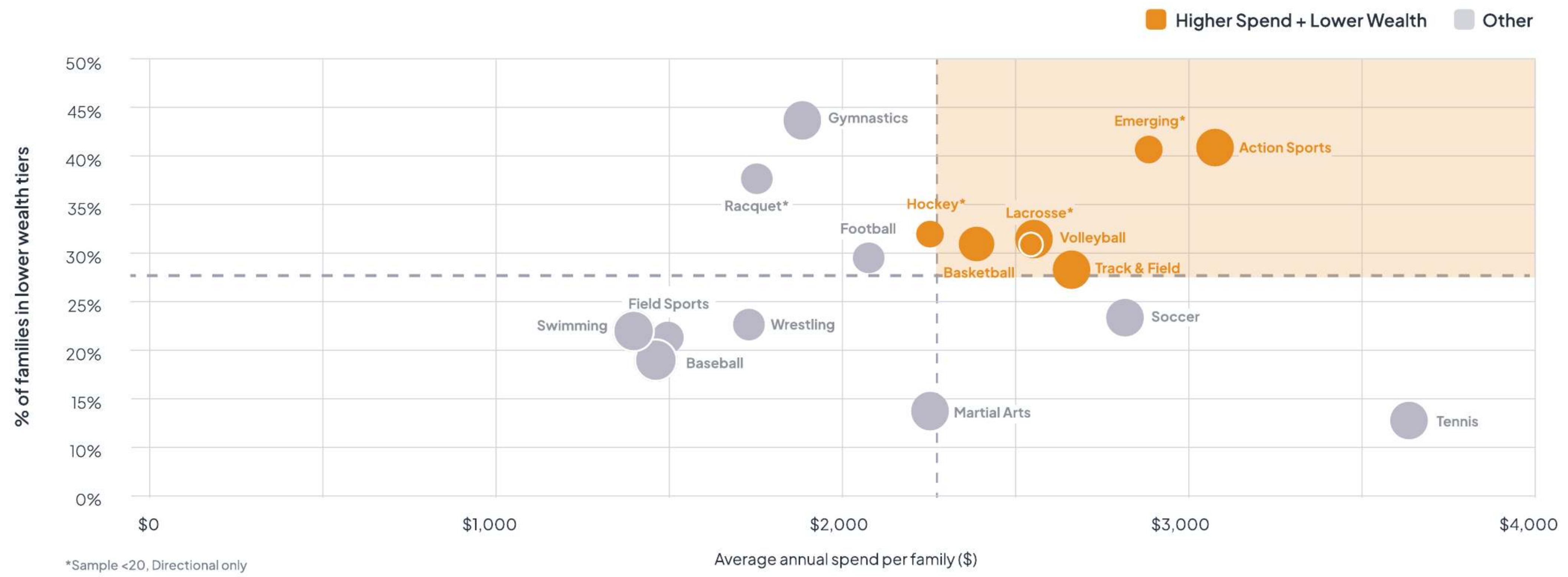
Despite varied levels of equipment, fees, and coaching, travel emerges as the common cost driver, regardless of sport. Average spend rises in lockstep from ~\$1,550 (local) to \$2,125 (regional) to \$2,965 (multi-day) to \$6,417 (national/international), and the \$5,000+ tier scales from 6% to 50% across the same path. Travel is the single strongest predictor of household spending, outpacing sport, organization type, and reported family wealth.

Average Spend By Travel



High cost, lower wealth families – led by Action Sports

While some sports cluster where cost and family means align, a handful break the pattern. Action sports carry the second highest average spend, but roughly 4 in 10 of its families sit in the lower wealth tiers, indicating that spend is driven by what a sport demands, not by disposable income. For these households, participation reflects deliberate commitment and prioritization. This data also raises the question if traditionally accessible sports like soccer and basketball are trending toward pay-to-play participation, pricing out families at the lower end of the wealth scale.



03

The Technology Landscape

Current adoption, the tools gaining ground, and what organizations are most eager to explore next

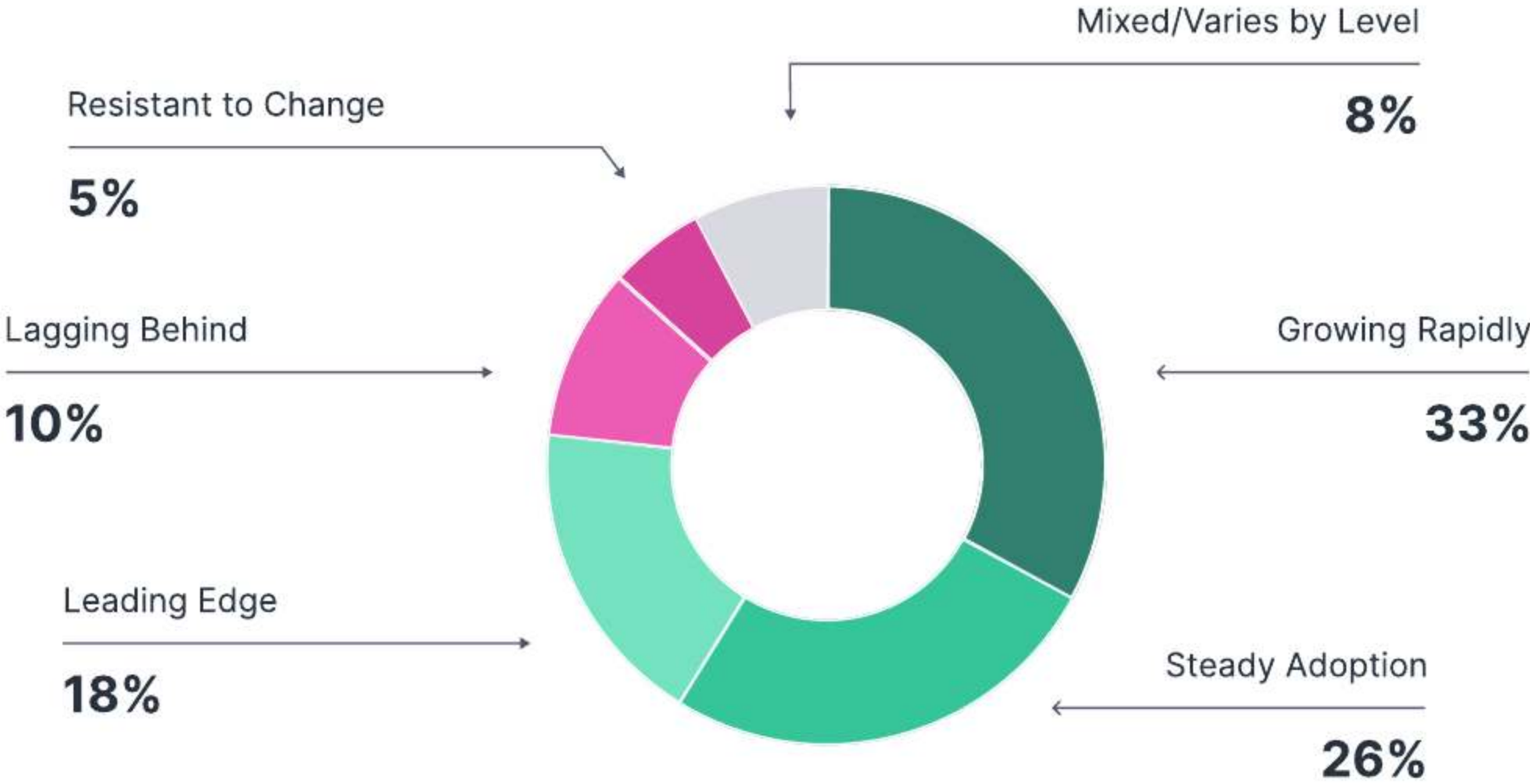


Optimism signals a tech ready market

Organizations are confident about where they stand on technology. Over three quarters (77%) see themselves as advancing, leading edge (18%), growing rapidly (33%), or adopting steadily (26%). Only 15% describe themselves as lagging or resistant.

What organizations believe about themselves though, only loosely matches what they do. Those that describe themselves leading edge genuinely use the most tools, but not by much (4.33 vs. 3.43 overall). And while some organizations that label themselves as "resistant", they in fact run an average number of tools, suggesting the label reflects mindset rather than capability.

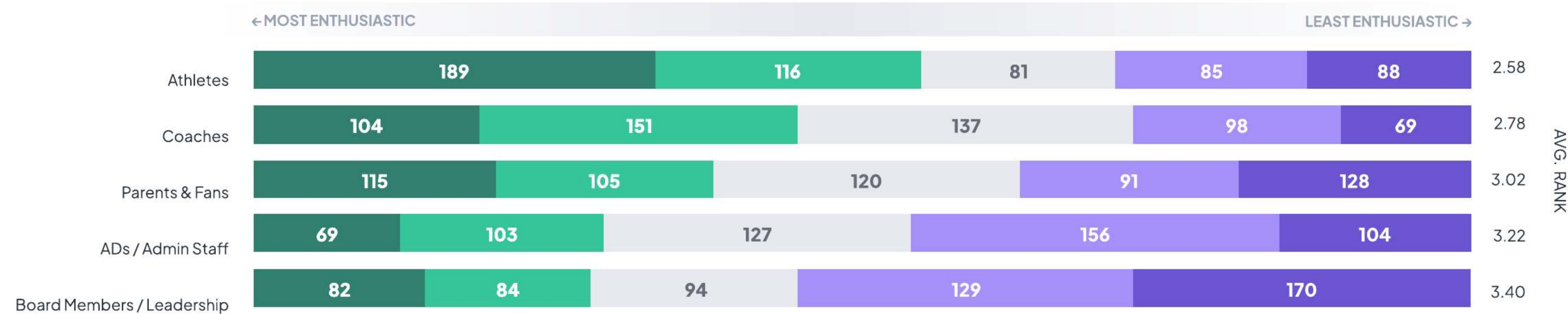
Describe the current state of technology adoption in your sports organization.



Technology enthusiasm starts with athletes

We asked respondents to rank each group in their organization from the most to least enthusiastic about adopting new technology. Athletes were ranked as most enthusiastic by the largest share of respondents (189), 116 ranked them #2, 81 ranked them #3, 85 ranked them #4, and 88 ranked them as least enthusiastic. The lower the rank, the more enthusiastic the group was rated.

With the exception of athletes, **every group rates its own enthusiasm higher than others rate it.**



Wide adoption, scattered market

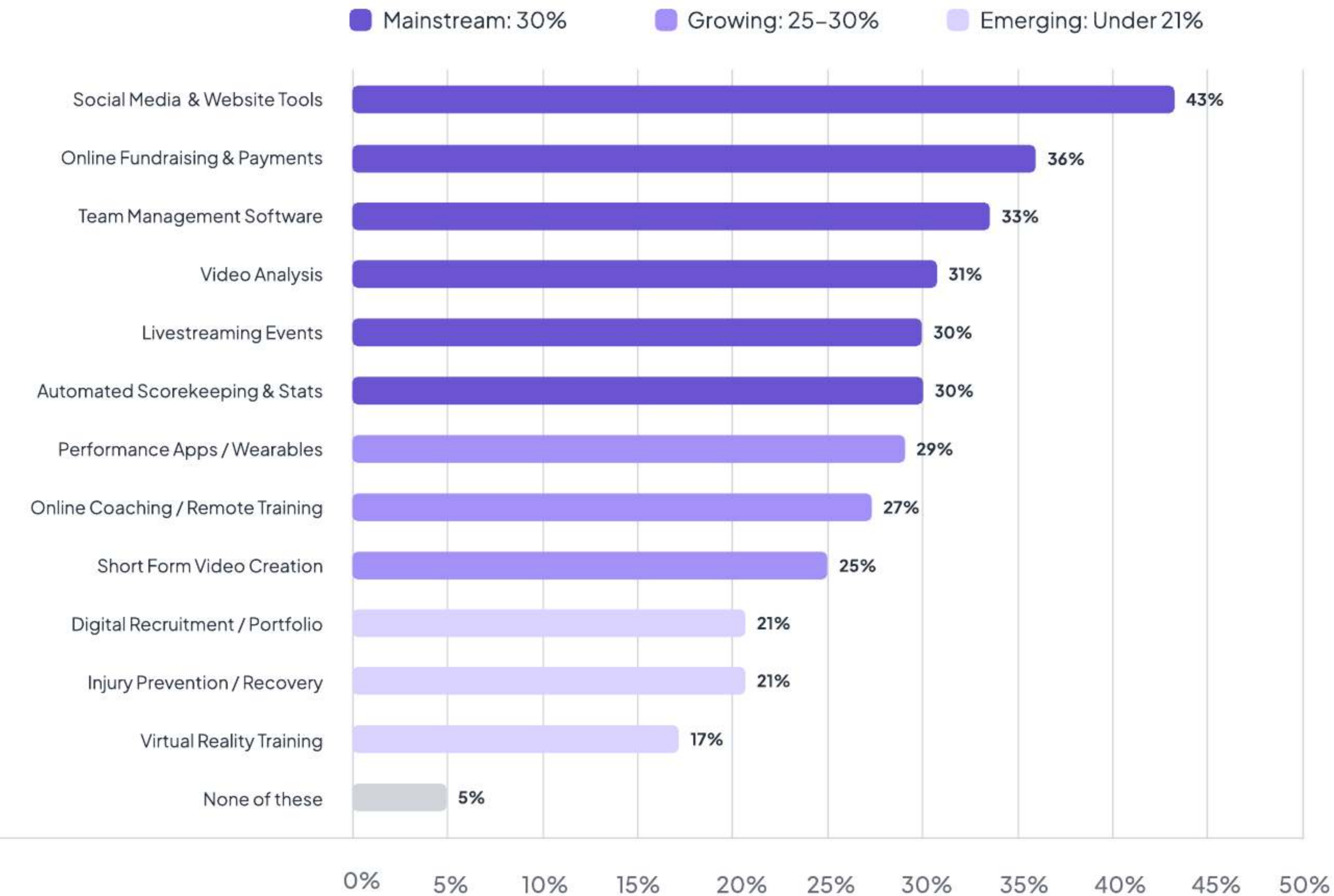
The technology landscape in youth sports is broad but shallow. Adoption is near universal with 95% of organizations using at least one tool. However, the typical organization runs just 3.4 of the twelve technologies, suggesting a space that has started to digitize but is far from saturated. Social media and website management (43%), fundraising and payments (36%), and team management (33%) lead, reflecting operational needs over athlete development.

Notably, livestreaming has entered the mainstream tier at 30%, outpacing performance wearables, recruitment tools, and short form video, pointing to meaningful growth. No single technology exceeds 45% penetration, and most sit between 20% and 35%, indicating a market split between many competitors.

3.4 average number of tools used

Which of the following technologies does your team or organization currently use?

Multi-select, totals exceed 100%.



Tech adoption varies by sport

Several sports over-index sharply on specific technologies, and the pattern appears to align with how each sport competes and builds community. For example, Swimming leads on VR training, reflecting a need to coach and model form on dry land. Wrestling skews heavily toward recruitment tools (35% versus 21%) and performance wearables (43% versus 29%), likely due to limited travel budgets that push recruiting online, and weight class requirements driving wearable use. Field sports lean on online coaching, near 41% against a 27% average, matching their one-on-one instruction model.

Niche sports are the content creation segment

In the absence of traditional broadcast coverage, Gymnastics, Action Sports, Equestrian Sports, Track, Wrestling, and Racquet Sports are building audiences through social and grassroots media.

Technology	Overall		
Social Media & Website Tools	43%	Gymnastics / Cheer 58%	Action Sports 56%
Online Fundraising & Payments	36%	Gymnastics / Cheer 45%	Soccer 44%
Team Management Software	33%	Martial Arts 46%	Tennis 44%
Video Analysis	32%	Martial Arts 39%	Football 38%
Livestreaming Events	30%	Emerging Sports* 46%	Action Sports 40%
Automated Scorekeeping & Stats	30%	Swimming / Diving 42%	Racquet* 40%
Performance Apps / Wearables	29%	Lacrosse* 50%	Racquet* 47%
Online Coaching / Remote Training	27%	Lacrosse* 50%	Field 41%
Short Form Video Creation	25%	Track & Field 36%	Wrestling 35%
Digital Recruitment / Portfolio	21%	Wrestling 35%	Soccer 30%
Injury Prevention / Recovery	21%	Action Sports 32%	Hockey* 31%
Virtual Reality Training	18%	Swimming / Diving 32%	Racquet* 27%

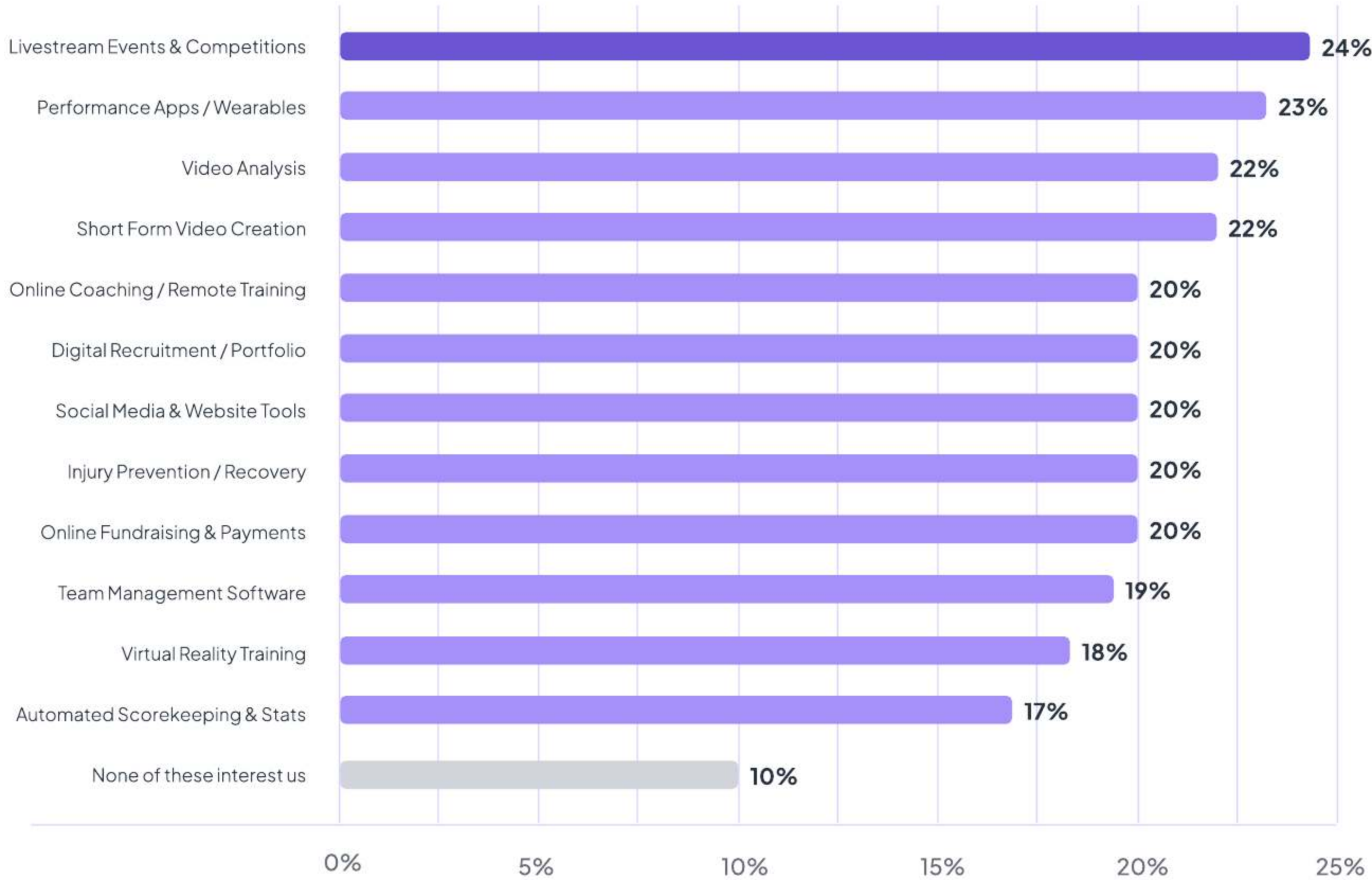
*Sample <20, Directional only

Performance and content lead excitement

Respondents were asked which technologies they were most excited to explore, choosing up to three, with the options limited to technologies they do not use. As a measure of forward demand, it isolates an organization’s appetite for future tools versus satisfaction with their existing tools. The large majority named at least one technology, and most used all three selections, signaling genuine interest expanding their stack rather than settling for the status quo.

Livestreaming draws the strongest forward interest, reinforcing that even among organizations not yet streaming, the intent to adopt is real. Performance wearables, video analysis, and short form video follow closely, a cluster oriented toward capturing and improving play rather than administration. Notably, the operational tools that dominate current use like team management, scorekeeping, and payments attract little forward excitement, most likely because they’re viewed as essential rather than aspirational.

Which of the following technologies are you most excited about?

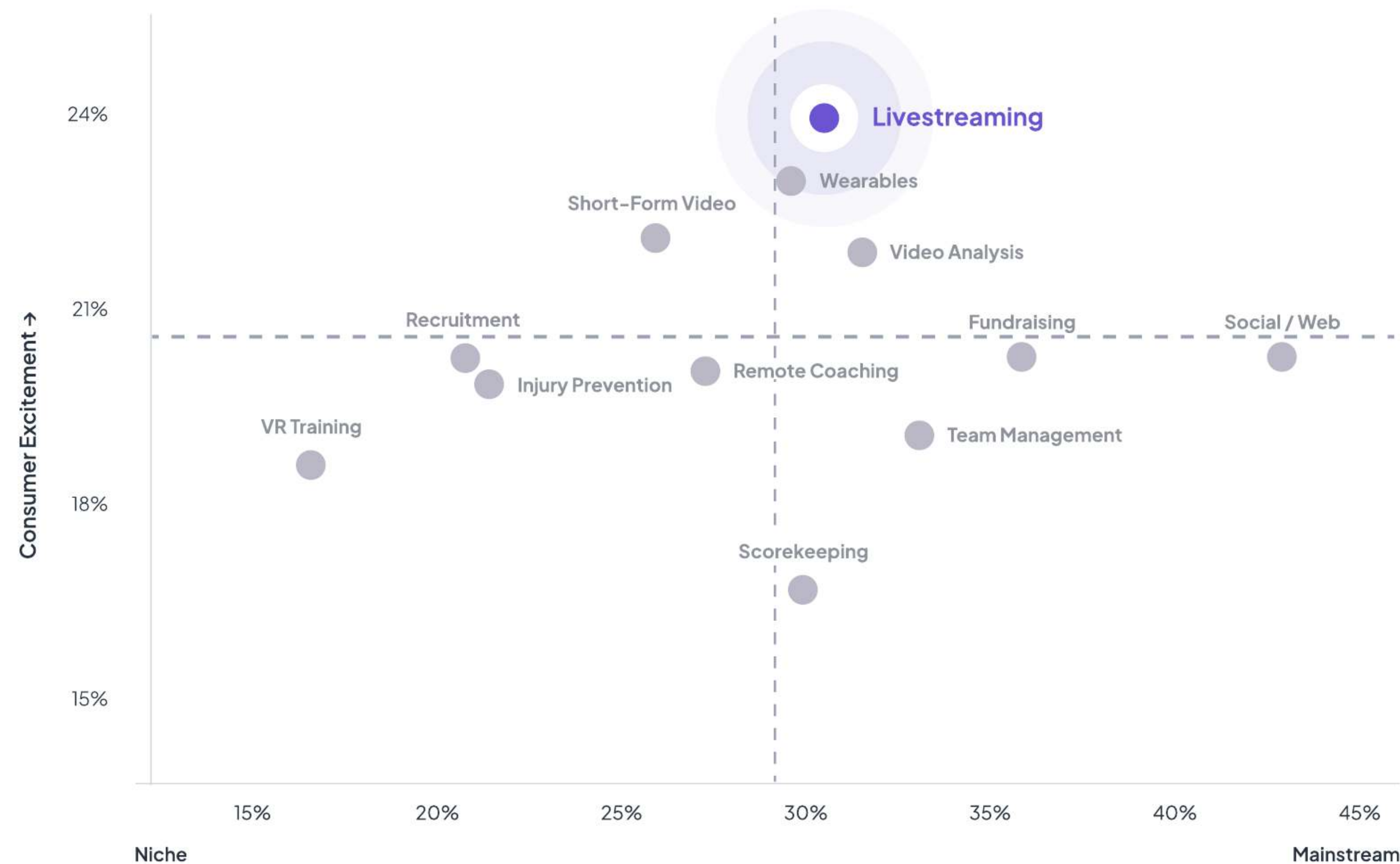


Livestreaming is mainstream, yet still in growth mode

Most technologies show current use exceeding excitement, a sign of maturity. The widely adopted operational tools such as scorekeeping, fundraising, and team management are utilities organizations have come to expect, valued for function over potential.

Livestreaming stands apart. It commands the highest excitement of any technology at 24% while already in mainstream adoption at 30%, signaling demand that has not plateaued.

A second cluster spanning VR, recruitment, and injury prevention pairs low adoption with excitement that holds or exceeds it, marking emerging headroom for future growth.



04

Livestreaming Adoption

1 in 3 organizations
now livestream



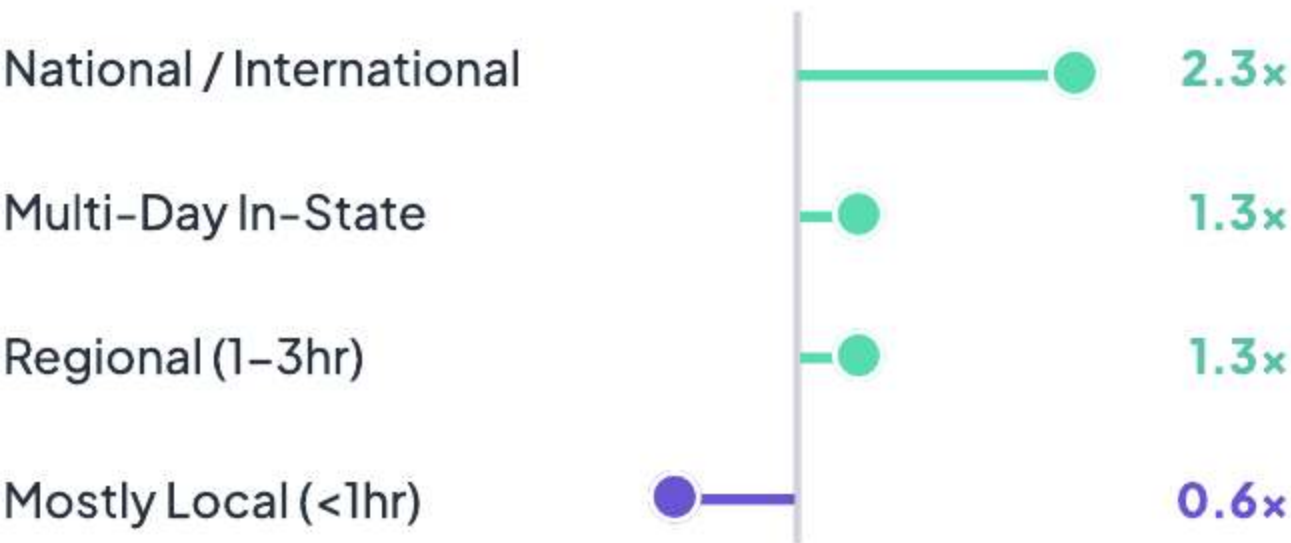
Who is the typical streaming organization?

Programs whose athletes travel regionally or farther stream at well above the rate of their non-streaming peers, while those that stay local lag behind. High spending tracks the same pattern, where families who spend \$5000-\$10,000 per child are 2.5 times as common among streamers as non-streamers.

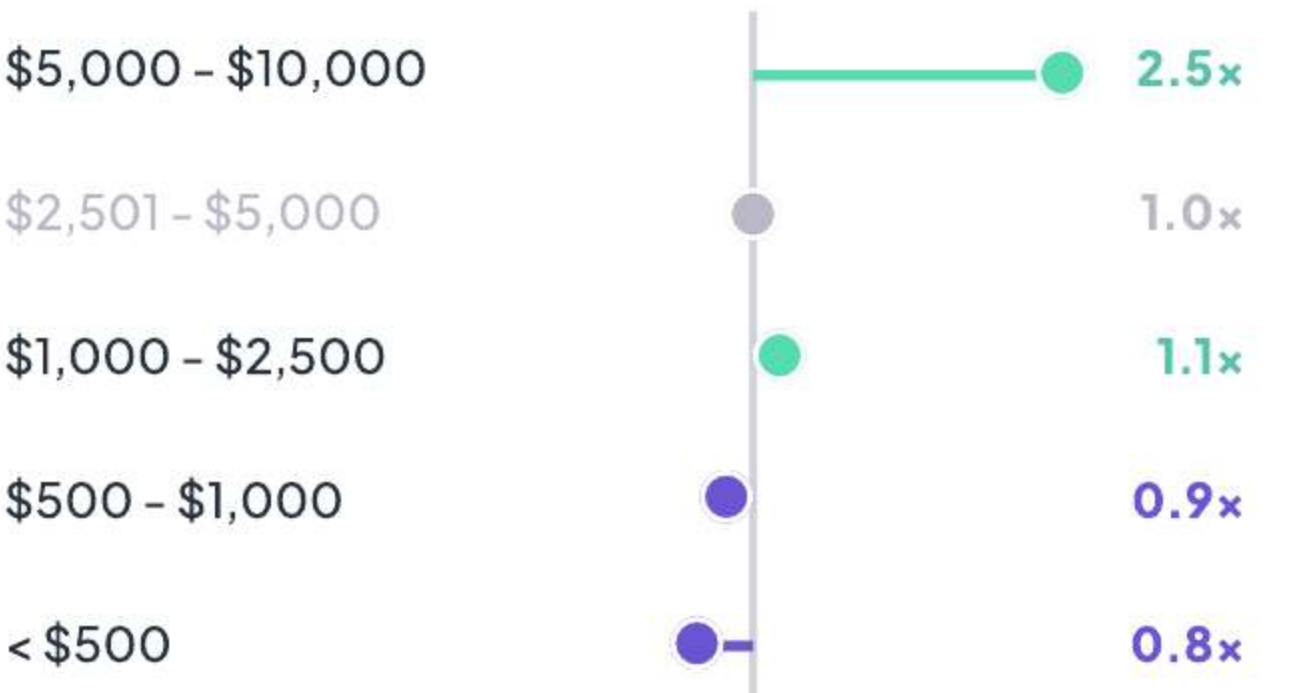
Yet the communities aren't necessarily affluent. They skew mixed-income, with a tail of high-spending travel families inside an otherwise ordinary base. The pattern points to mobility and the families already on the road.

Directionally, Wrestling, Action Sports and Emerging sports -where traditional broadcast is absent - also lean towards streaming.

Travel Footprint



Annual Spend



Family Wealth

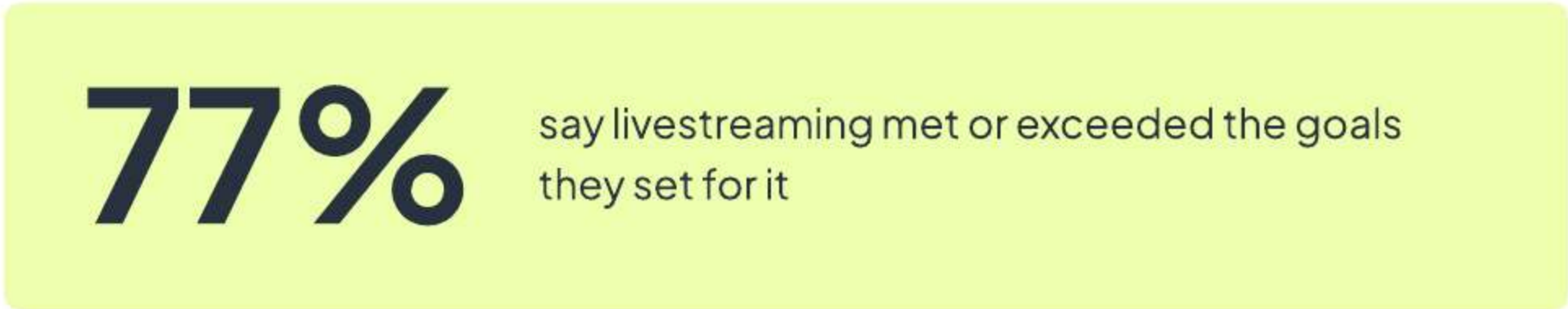


Sport (directional)

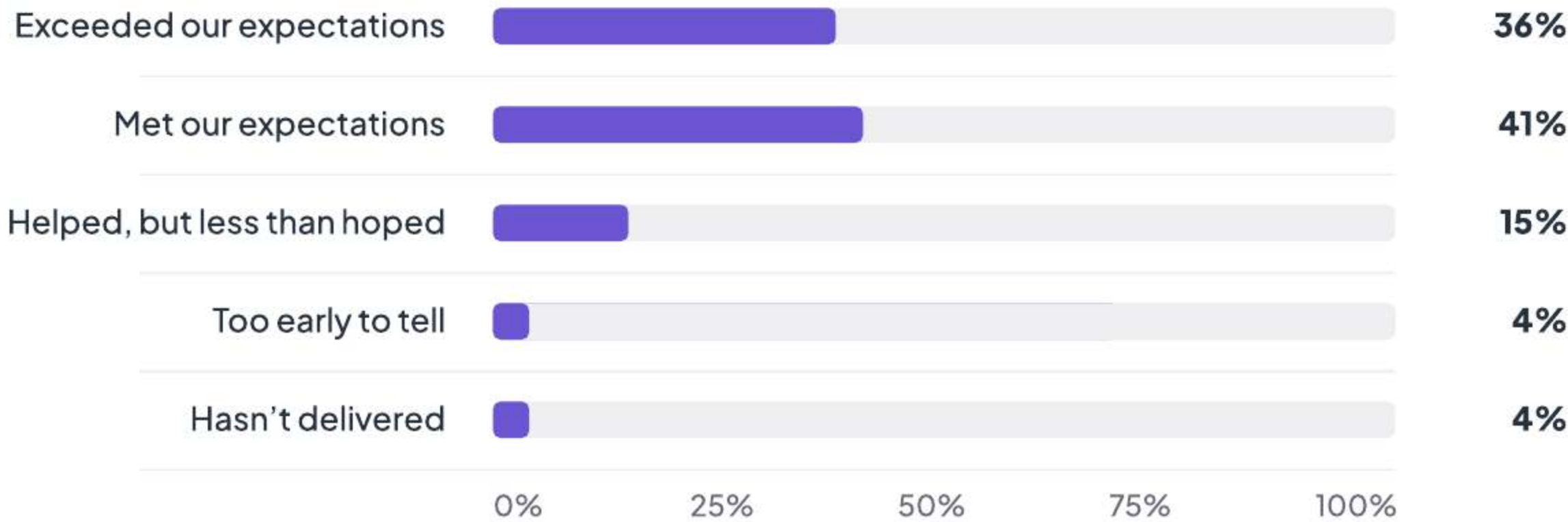


Livestreaming delivers on its promise

Livestreaming earns a strong verdict from those who have adopted it. More than three quarters of organizations say it met or exceeded their original goal, and notably 38% report it exceeded expectations outright, a rare level of unqualified satisfaction. Only about one in five came away underwhelmed, with only 4% judging it a disappointment.



Has livestreaming delivered on your primary reason for implementing it?



Parents are driving livestream demand

Organizations adopt livestreaming primarily to satisfy family demand, not to generate revenue. The dominant motivation is parents and families, cited by 42% as the main reason for livestreaming, followed by athlete recruitment and college exposure at 23%, and local competitive pressure at 13%. Revenue ranks far lower, named by fewer than 8%. The decision is fundamentally about access and engagement.

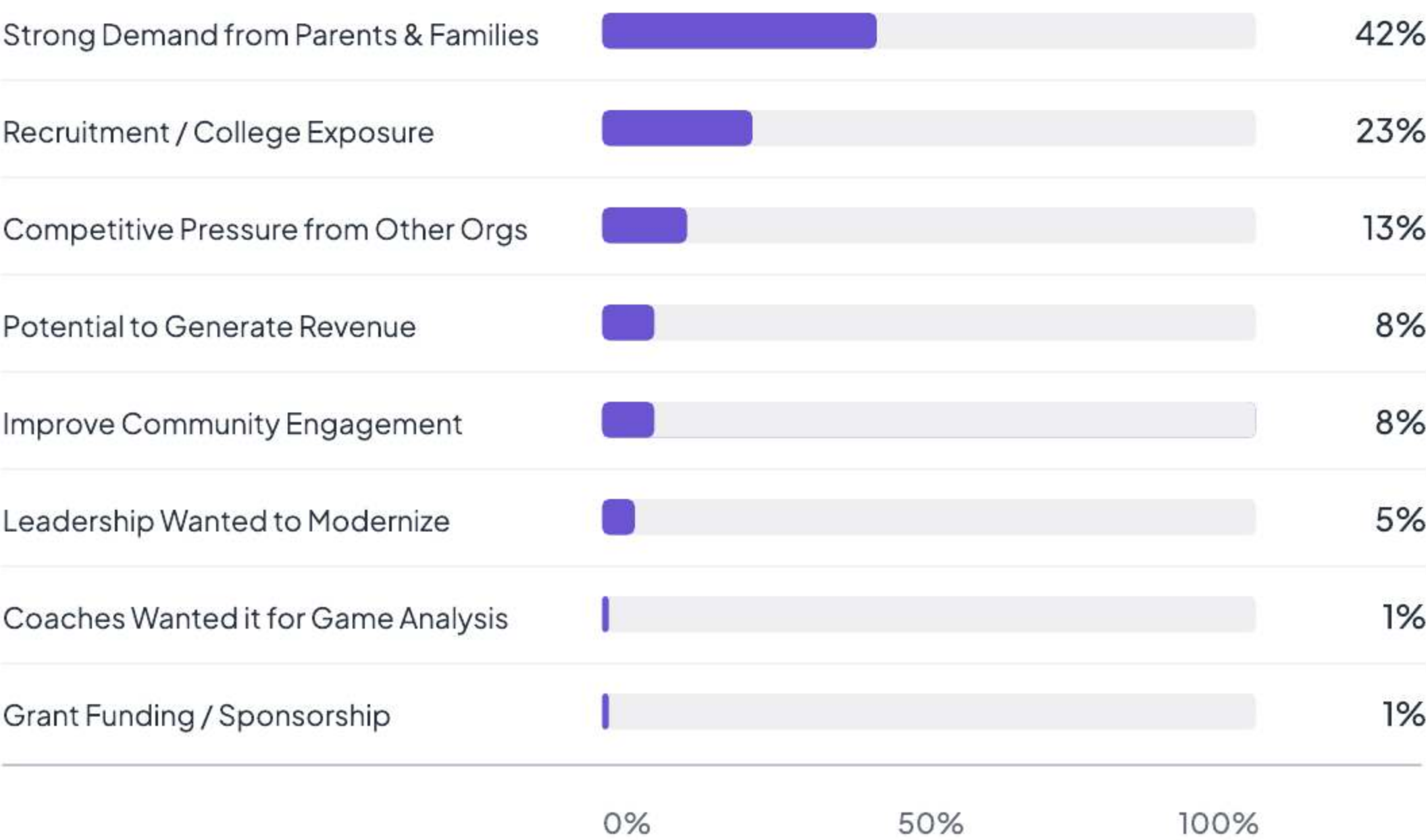
92%

satisfaction when families drove the launch

63–64%

satisfaction when athlete recruitment or competitive pressure are the drivers

What was the main reason your organization started livestreaming?

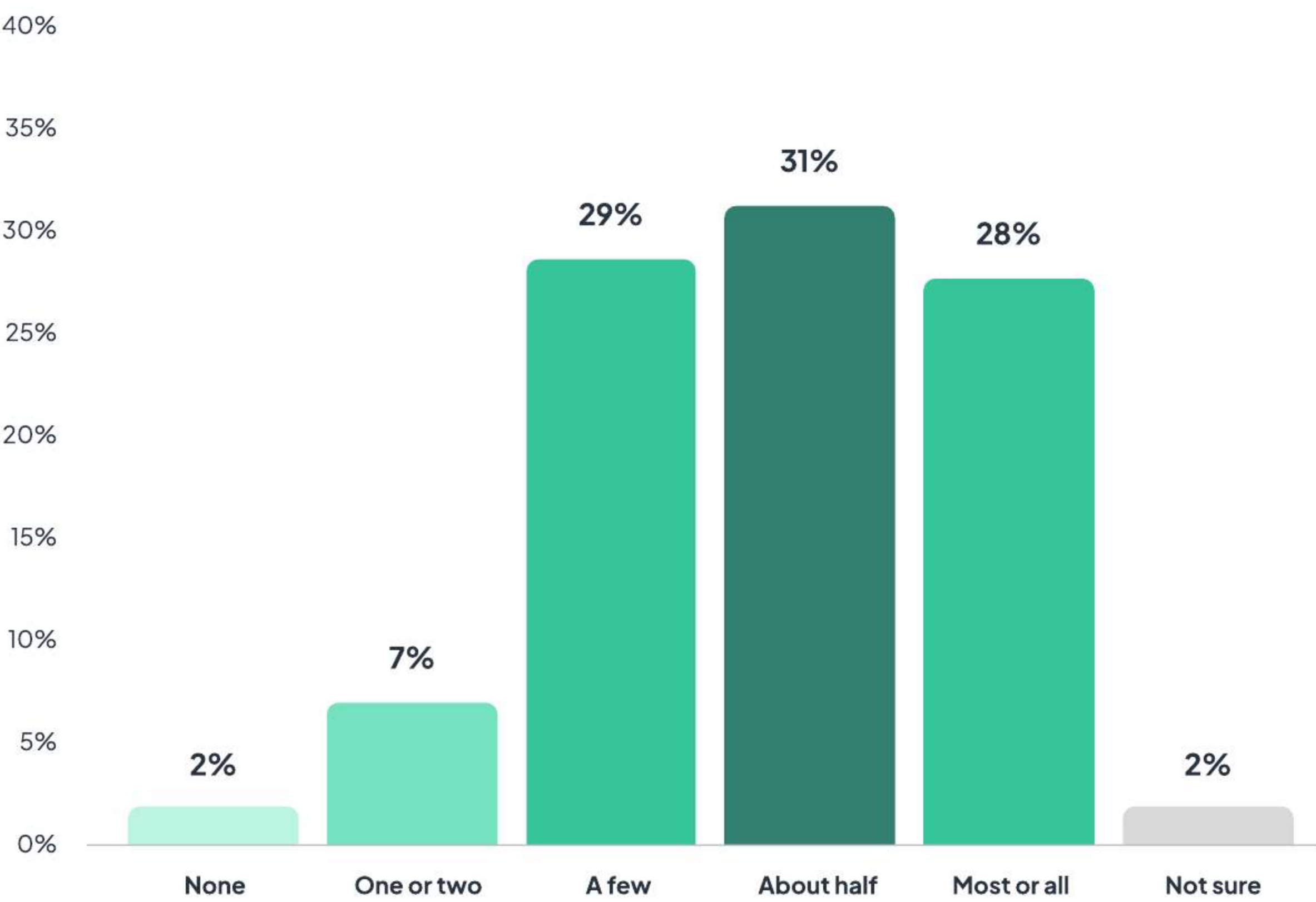


Streaming is contagious

Peer activity and streaming go hand in hand. Among organizations that stream, nearly 90% report that at least a few comparable organizations in their area also stream, and nearly six in ten sit in markets where about half or more do. At the other end, almost no one streams in isolation. Just 4 of 169 streaming organizations report that no peers in their area stream at all, and another 4 are unsure what peers are doing. Organizations adopt where they can see others doing the same, whether because peer activity normalizes the idea, creates pressure to keep up, lowers the perceived risk, or simply makes the tools and playbook easier to copy.

9 in 10 streamers operate in markets where peer streaming is already visible.

How many organizations in your immediate area or league currently offer livestreaming for games or competitions?



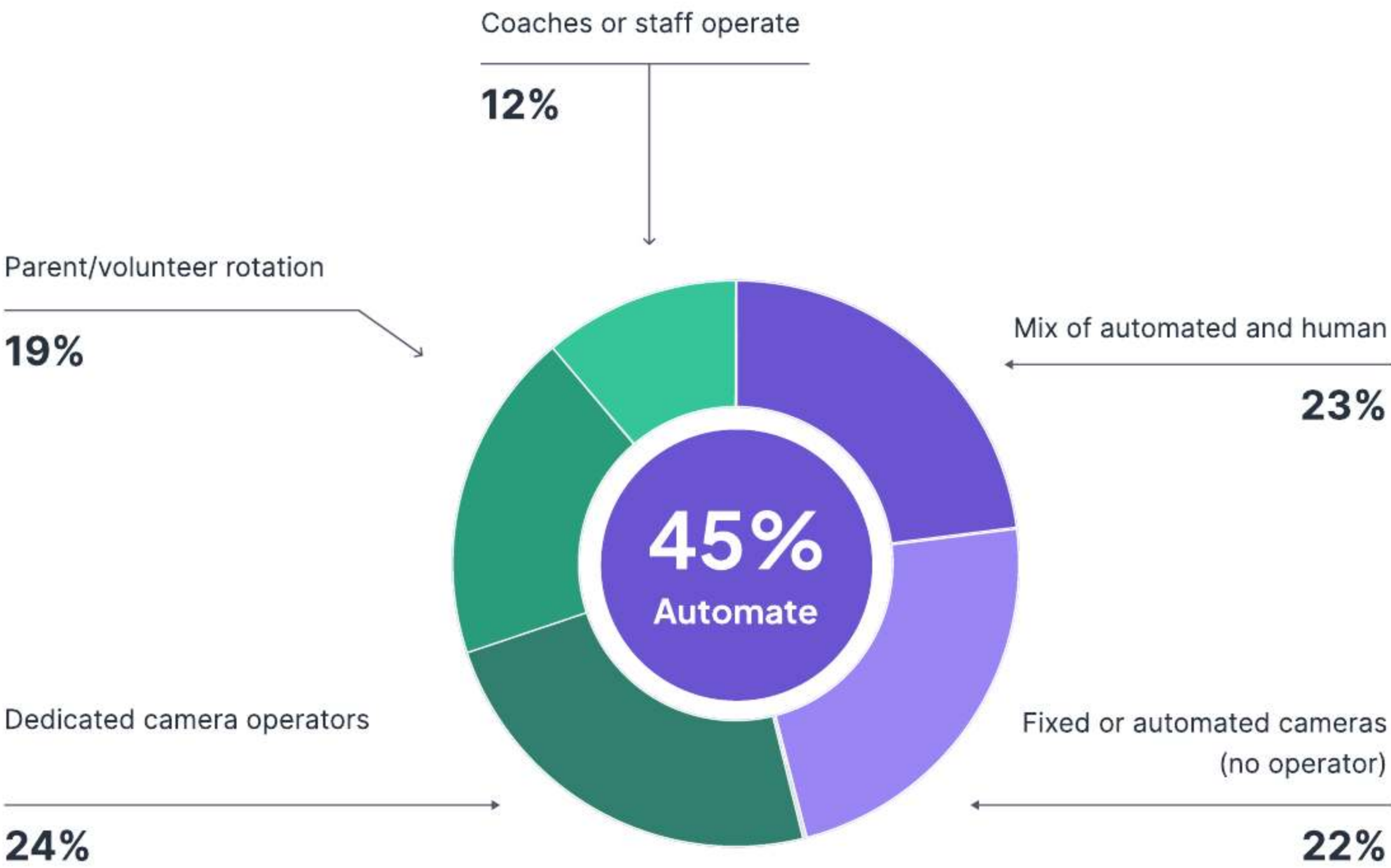
Automation is rising, but humans still run the camera

Automation has gone mainstream in camera operation. Roughly 45% of streaming organizations now use some form of automated capture, split fairly evenly between hybrid setups that pair automated cameras with a human operator (23%) and fully automated, operator free systems (22%). But widespread adoption doesn't mean replacement.

A human is still part of the equation in more than three quarters of organizations, including the 55% that rely entirely on a human operator, and the 23% running hybrid where people and machines work side by side.

Only about one in five has taken the operator out of the picture completely. The pattern is complementary where people remain essential wherever the technology falls short.

How does your organization typically handle camera operation for streaming?



Social Media Anchors Streaming

Organizations stream where audiences already are. YouTube (75%) and Facebook Live (60%) dominate the market, and 86% of streaming organizations use one or the other. Purpose-built sports platforms like GameChanger, FloSports, Hudl, and NFHS Network form a meaningful but fragmented second tier. The default streaming experience is based on the free consumer platforms where families and fans already spend their attention.

Additionally, 82% of respondents use more than one streaming platform, with an average of 3.3 platforms. One likely explanation is that no single platform covers all of an organization's needs, ranging from athlete focused recruiting to live scoring.

The **average org** uses **3.3 platforms**

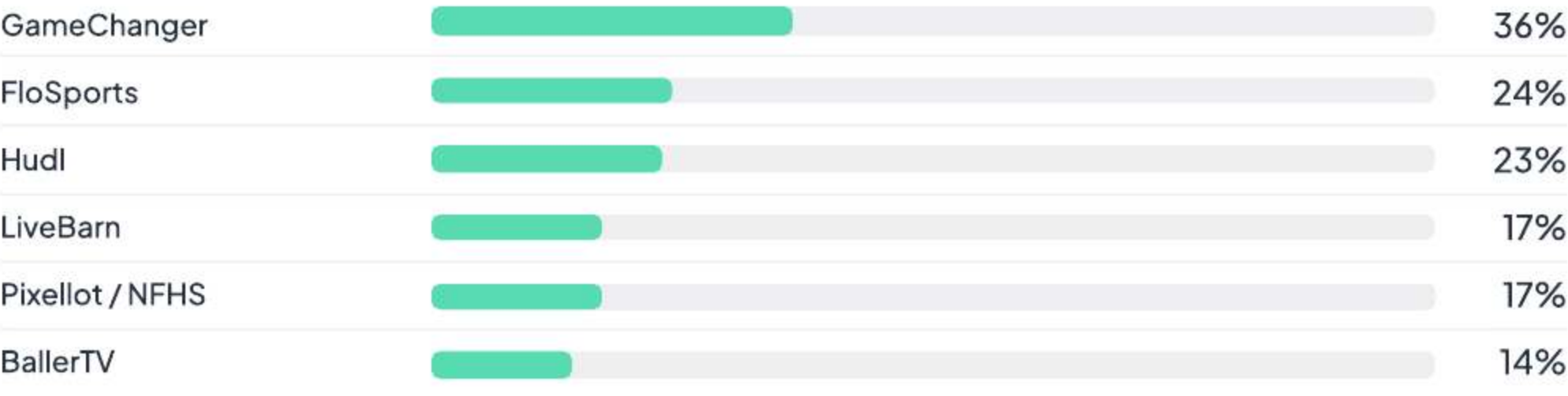
Which streaming platform(s) does your team/organization use?

Multi-select, totals exceed 100%.

General Purpose



Sports Specific



Other



Most cited upgrades

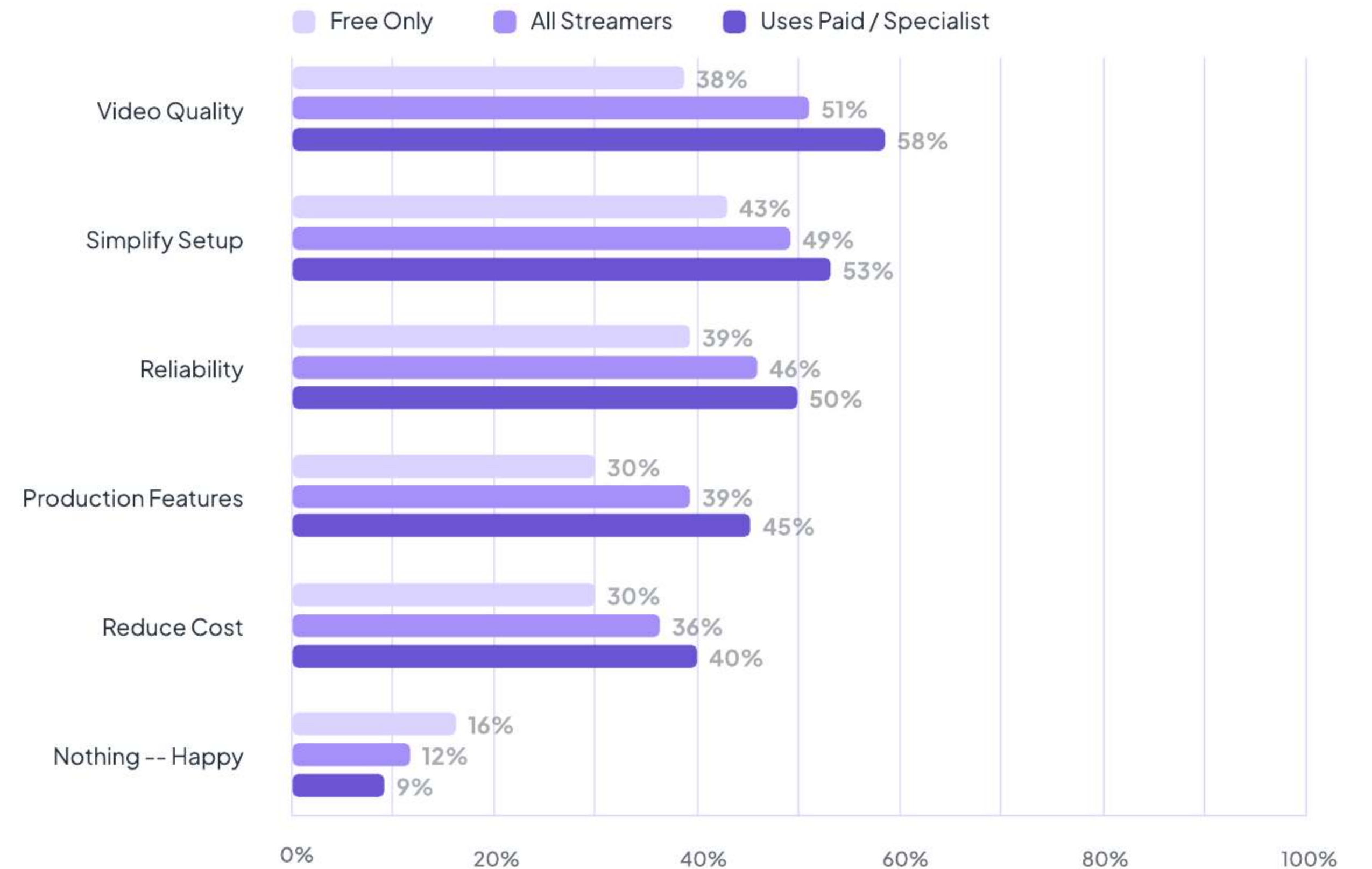
Asked what they would change about their streaming solution, respondents named an average of two upgrades, with almost half citing three or more. Wish lists cluster around operational simplicity and video quality, but the more revealing pattern is who voices them.

Organizations on YouTube, Facebook, and Twitch cite fewer desired changes on every dimension than those using specialized paid tools such as FloSports, GameChanger, or Hudl. The pattern suggests that free platforms are satisfactory as commoditized tools, while specialized platforms carry higher expectations and cost.

Orgs streaming only on free platforms are **more likely to be content as-is** (16% vs 9%) and want fewer changes (1.8 vs 2.5) than orgs streaming on a speciality platform

What would you change about your current streaming solution?

Multi-select, totals exceed 100%.



Pain Follows Streaming Setup

Unlike the previous question on broad improvement areas, we asked respondents to rank specific pain points. As a whole, the challenges look scattered, but patterns surface through the lens of how orgs operate, their setup, and how far they travel.

Organizations that rank camera positioning as a top pain tend to already use automated cameras, suggesting automation has solved the logistics of capture but not yet the judgment of framing. Clips and recordings are most painful for orgs on more platforms, likely because each one adds footage to capture, sort, and distribute. And for those that travel regionally or farther, internet and bandwidth dominate, where outdoor and remote venues force reliance on weak cellular, mobile hotspots, or satellite services.

How would you rank the following streaming challenges?

Challenge	1 - MOST	2	3	4	5	6	7 - LEAST	Avg.
Camera Positioning & Capturing the Action	19%	20%	20%	11%	10%	9%	11%	3.47
Finding Reliable Volunteers / Operators	20%	16%	11%	10%	13%	14%	16%	3.88
Managing Clips & Recordings	18%	10%	11%	19%	13%	15%	14%	3.99
Internet / Bandwidth	13%	15%	11%	18%	18%	11%	14%	4.00
Securing Camera Equipment	12%	12%	15%	17%	13%	16%	16%	4.19
Inconsistent Video Quality	9%	15%	20%	9%	16%	14%	17%	4.19
Inconsistent Audio Quality	9%	12%	13%	17%	17%	20%	12%	4.28

2x

Heavy travelers are more than twice as likely to name internet/bandwidth their #1 pain

05

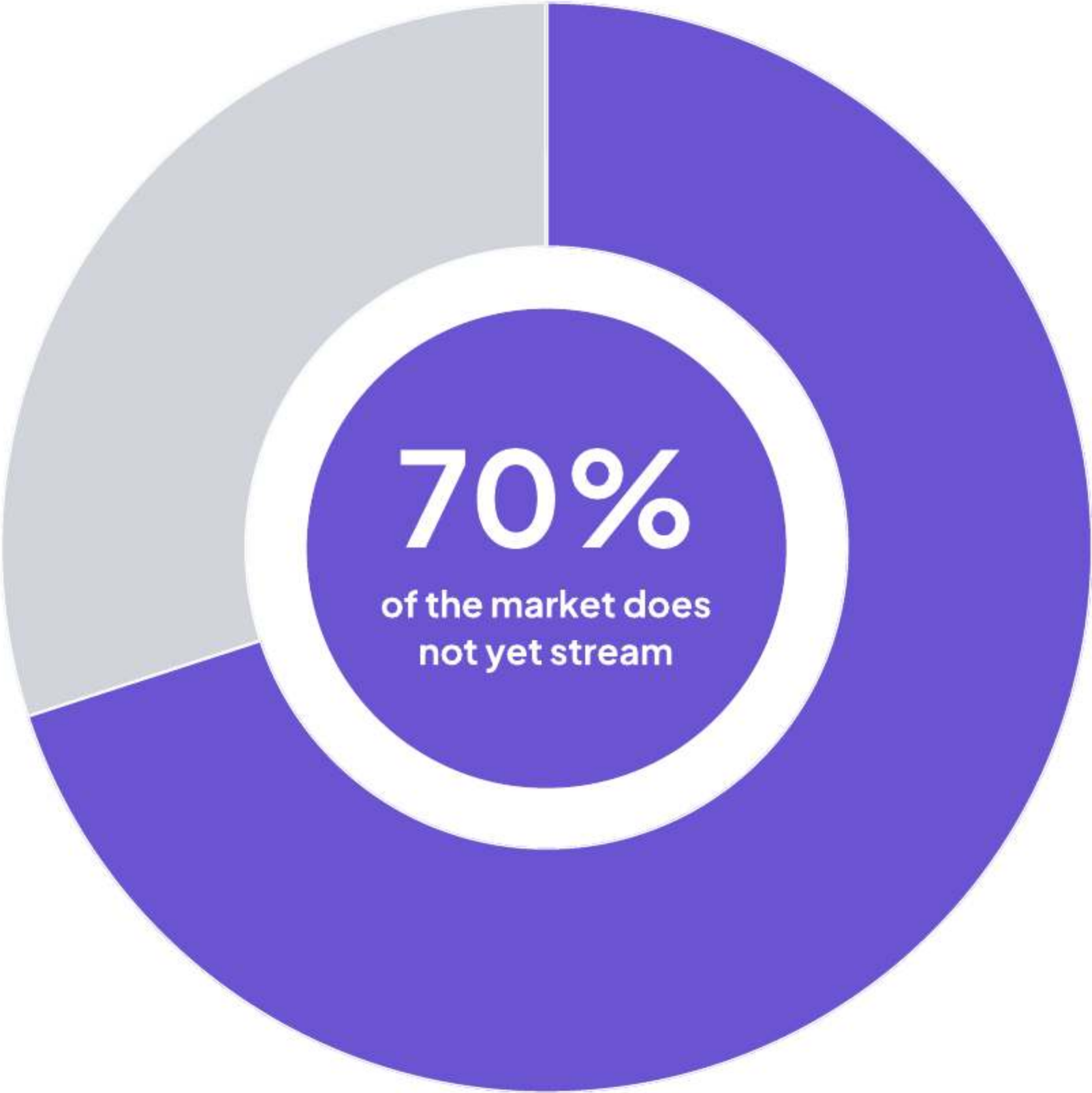
Non-Streamers

Seven in ten
organizations have yet
to adopt livestreaming



An untapped segment

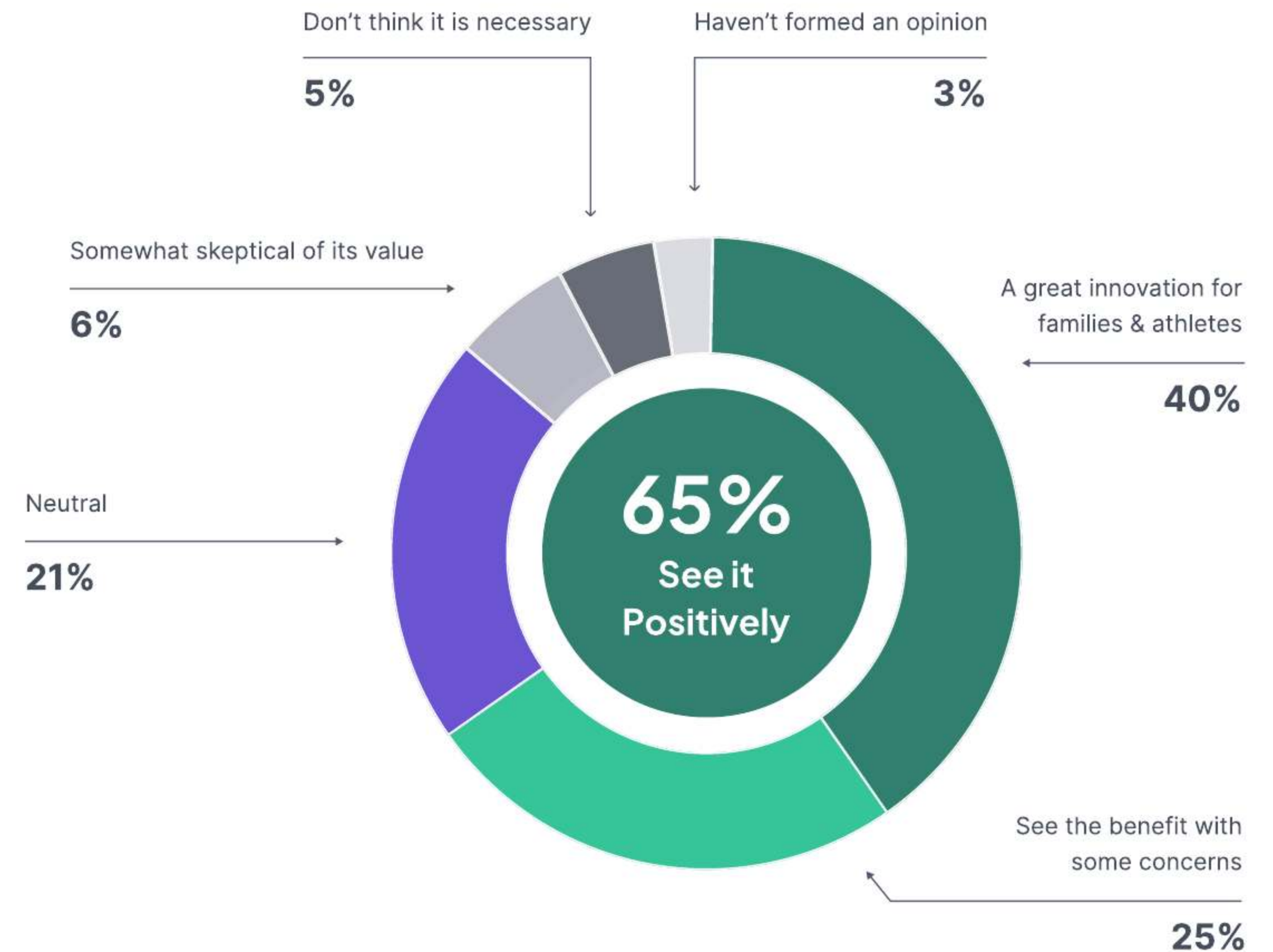
Non-streaming organizations make up the majority of the market, leaving a sizable white space opportunity for sports tech platforms to layer video on top of their scheduling, scoring, and team management tools. Non-streamers differ from streaming organizations in statistically significant ways, and point in the same direction. They are smaller, travel less for competition, spend less per child , and run far less technology overall (2.7 tools versus 5.1). As noted in the last section, streaming organizations cluster at the end that are typically larger and better funded, as well as highly committed travelers, suggesting streaming has taken hold where resources and/or needs are greatest. As such, non-streamers represent an early to late majority, pragmatic adopters who see the benefit but want a seamless and simple experience.



Favorable sentiment among non-streamers

Among non-adopters, sentiment for livestreaming is highly favorable, framing what non-adoption actually means. Nearly 40% characterize livestreaming as a great innovation that benefits families and athletes, and a further 25% recognize the benefits while citing implementation concerns. Genuine opposition is marginal. Only 6% question its value and 5% consider it unnecessary, together accounting for roughly one in nine. So while organizations are holding back, the majority are neutral to positive, suggesting non-adoption stems from limited awareness rather than a lack of demand.

Regardless of your organization's current approach, what is your personal opinion about livestreaming youth sports games?



The biggest barrier is perception

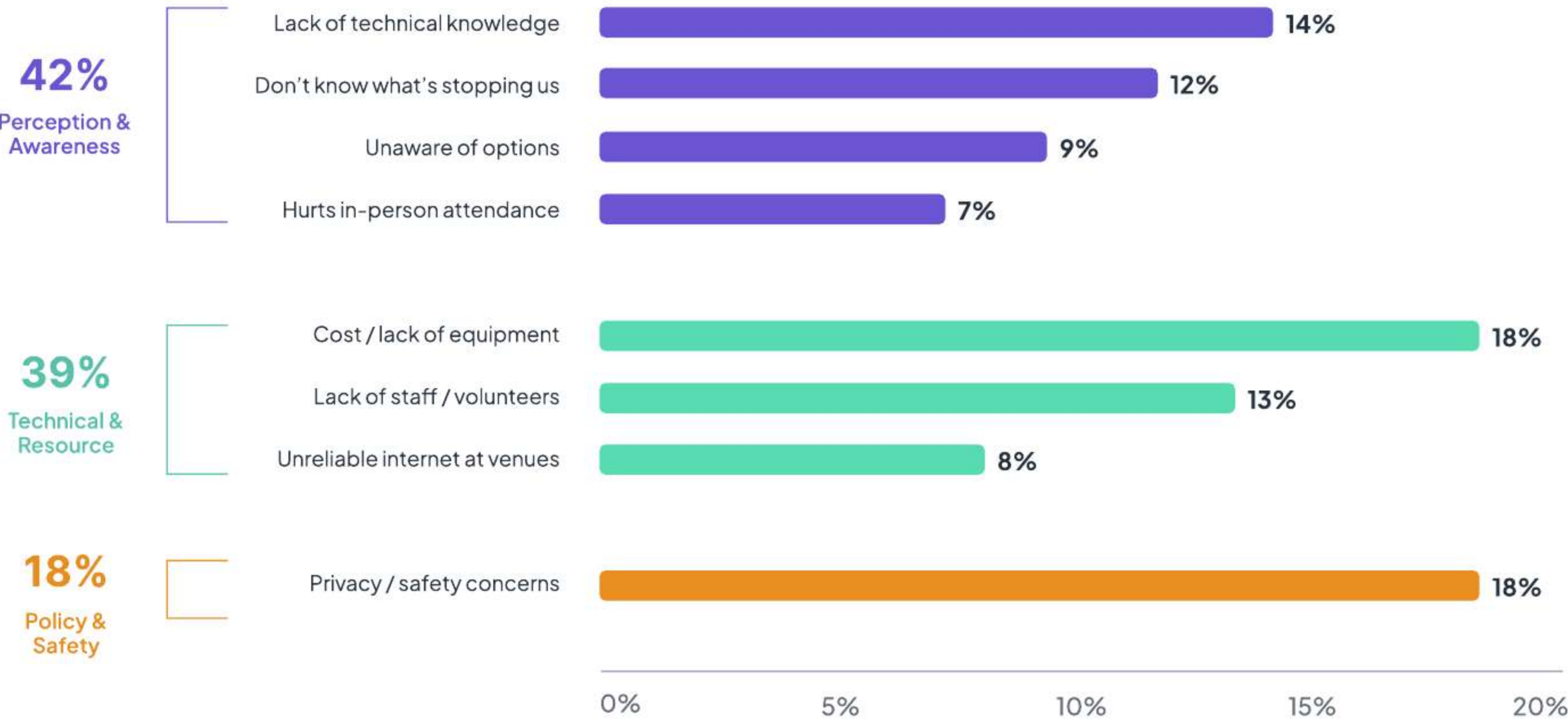
Grouped by type, the largest barriers are around perception and awareness. They represent knowledge gaps, which can be closed through education, onboarding, and embedding video into tools organizations already use.

For example, cost/lack of equipment and lack of technical knowledge rank as top barriers, but as the next view indicates, these requirements may be overestimated.

Privacy is the Feature

Privacy and safety (18%) reads like a dealbreaker, but it's where sports tech platforms win. When permissions stay within an access controlled environment, limited to the parents, coaches, athletes, and trusted community, the top objection becomes a differentiated advantage.

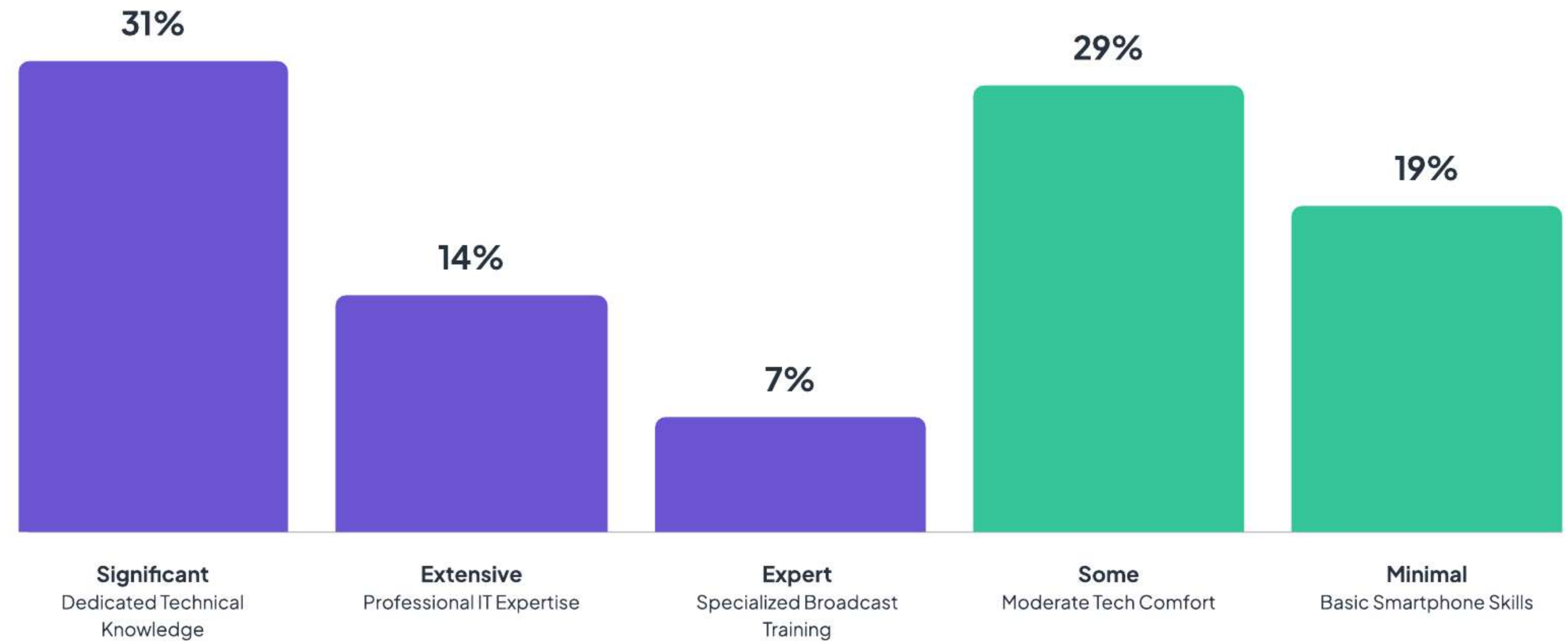
What is the primary reason your team/organization has not implemented livestreaming?



Perceived complexity

Asked how much technical expertise livestreaming requires, over half judged it to demand significant skill or more, ranging up to professional IT or specialized broadcast training. As a mindset formed by a group of self-reported non-streamers, this is likely based on assumption rather than experience.

Based on what you know, how much technical expertise do you think livestreaming requires?



51%

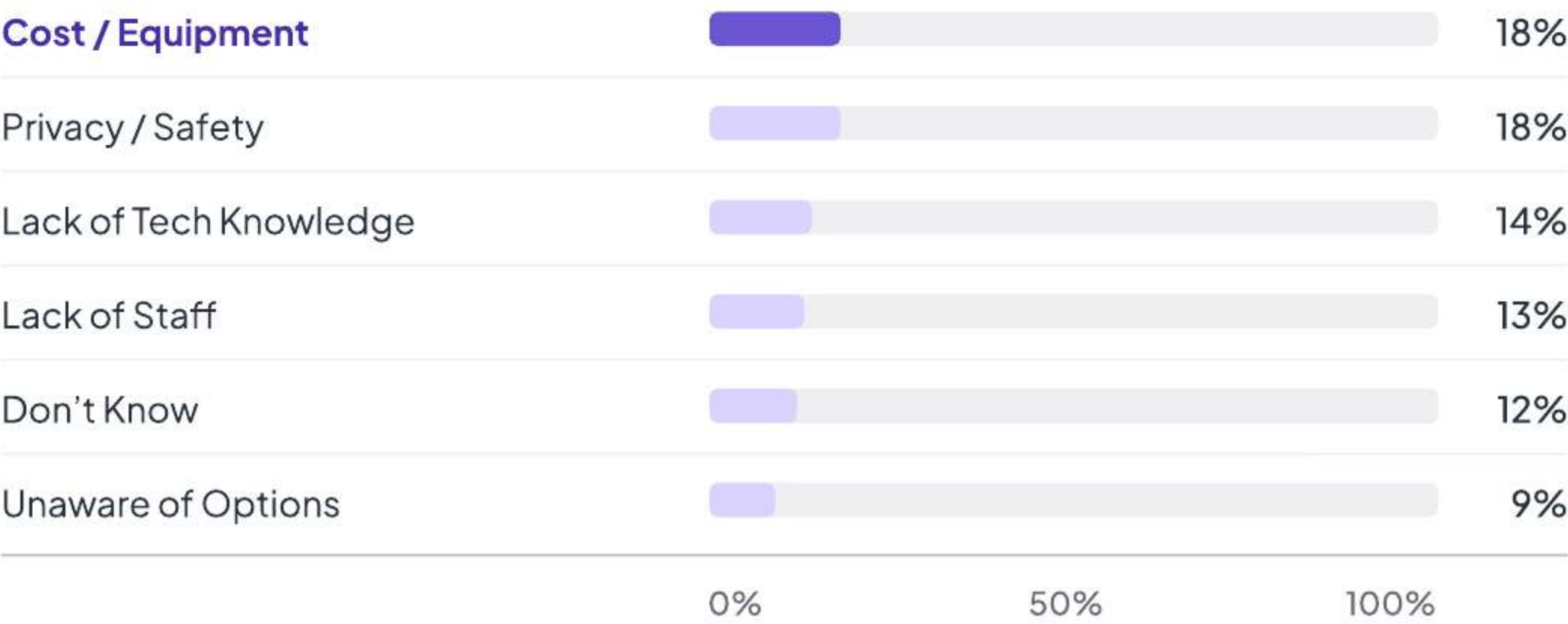
Over half of non-streamers believe livestreaming requires "significant" technical expertise or more

Cost is a friction at entry, not in ongoing use

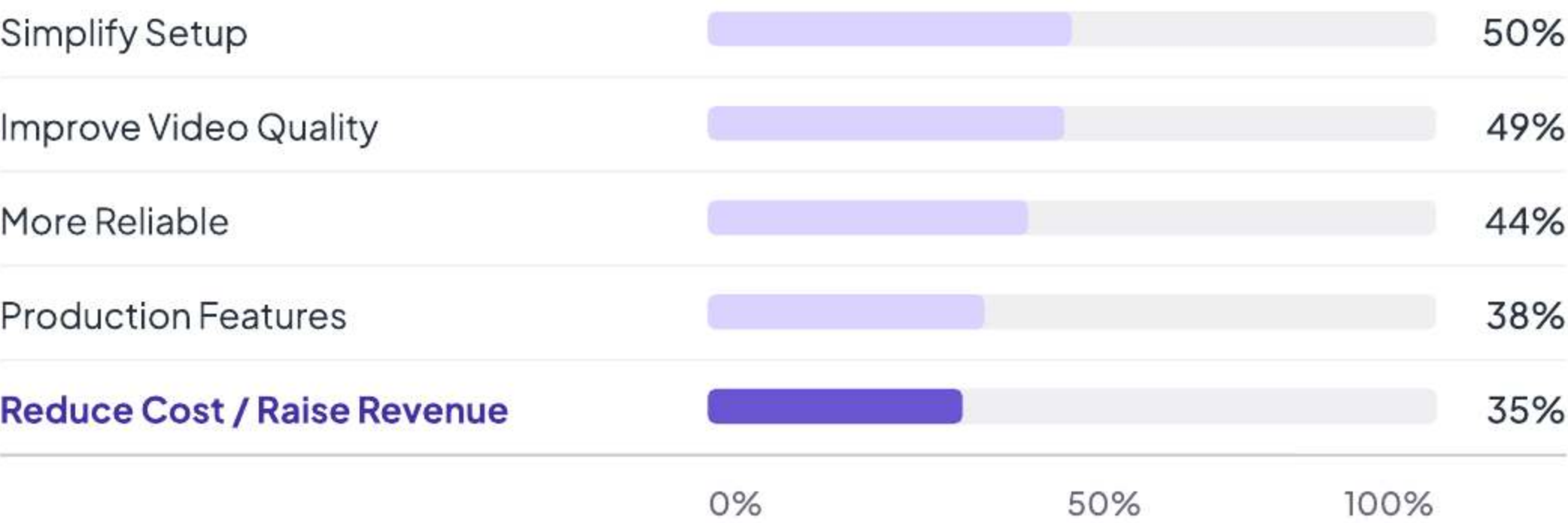
Cost functions as a barrier to entry, not as a barrier to satisfaction. Among non-streamers, cost/equipment is tied with privacy as the primary obstacle to livestreaming. Among organizations already streaming, the picture is reversed. Reducing cost ranks last among the changes they would make, well behind simplifying setup, improving quality, and reliability. As the previous view indicated, it could be that non-streamers are pricing a version of streaming that includes advanced equipment and professional broadcast crews.

\$ Cost Flips: Tied for the #1 barrier to starting, it falls to last place among the changes streamers want.

Non-Streamers Primary reason for not starting (single-select)



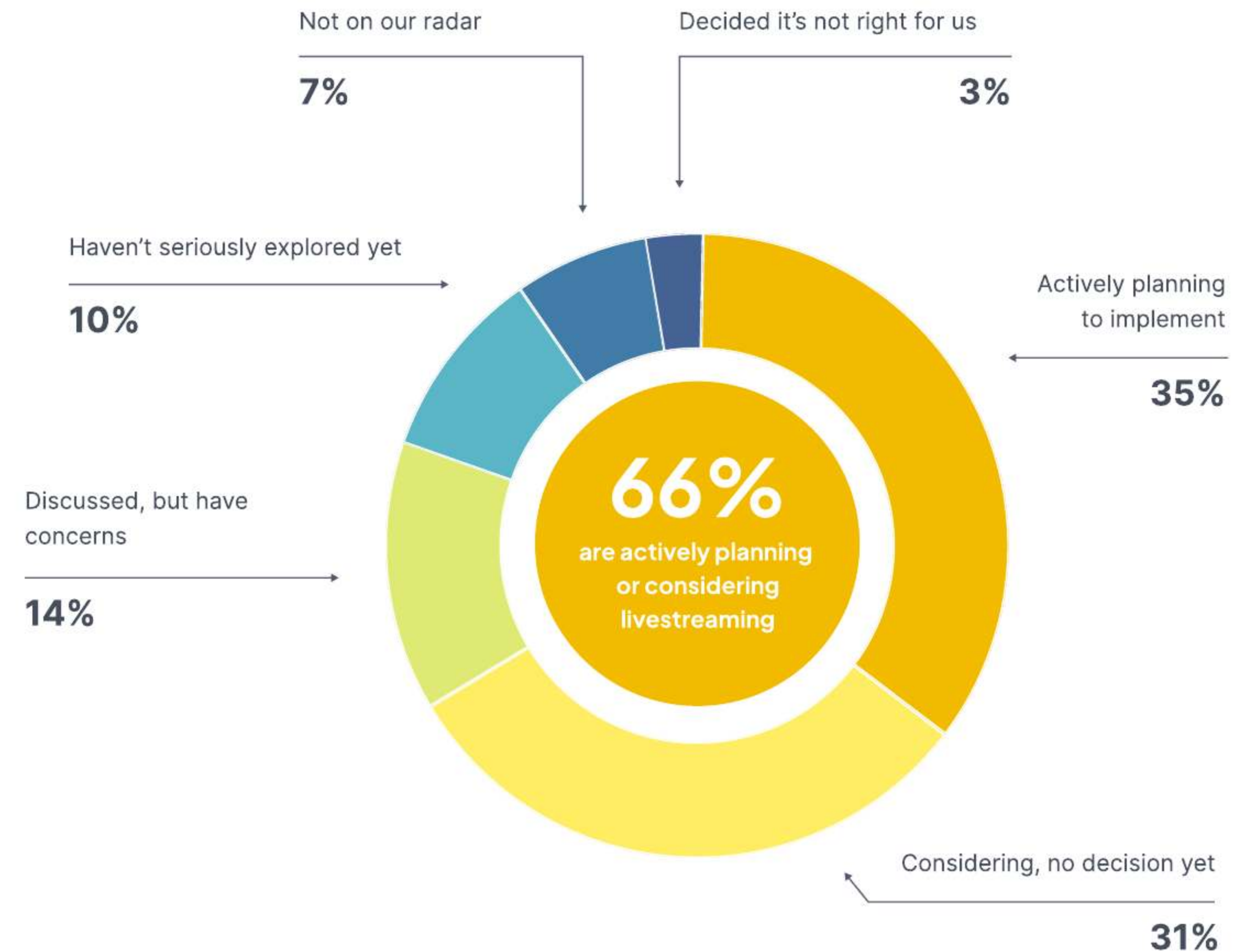
Current Streamers What they'd change (multi-select)



Strong intent among non-streamers

The large majority lean toward near term adoption with two thirds of non-streamers as warm on livestreaming (actively planning or considering it) while only a small slice is cold, having ruled it out or never considered it. Examining the audience more closely, warmer organizations tend to be larger, draw bigger audiences, and are more digitally active with more tools. Colder organizations are the inverse with smaller programs, lower spend, and minimal existing tech. More importantly though, cold doesn't equate to opposed. Even among the cold segment, only a small minority genuinely thinks streaming isn't for them. The rest are simply dormant or undecided.

What is your organization's current position on livestreaming games/events?

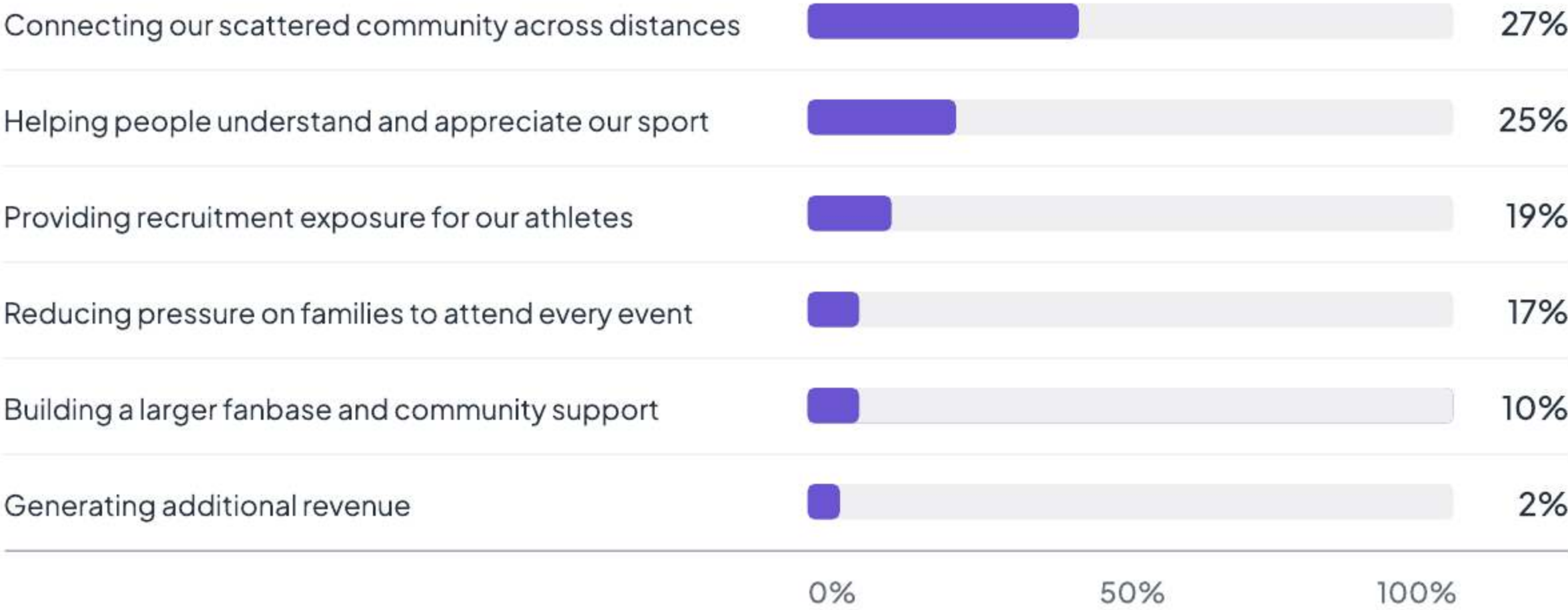


Connection over monetization

Asked what single problem livestreaming would solve, organizations point to bridging scattered communities and raising their sport's profile, with recruitment exposure and easing family attendance pressure close behind. Revenue ranks dead last at just 2%, signaling that the value organizations seek is connection and visibility, not income.

Beneath the aggregate though, every segment tells a different story. For example, families on a budget rank easing the pressure to attend every event as their top motivation, while elite travel teams put recruitment first. The segment with the highest annual spend places a high value on building an appreciation for their sport, a hallmark of niche, underrepresented disciplines like Action and Equestrian sports. And although revenue is not a motivator for the broader market, those who are motivated by revenue tend to draw large audiences, as well as operate modest programs, making livestreaming an obvious opportunity to offset costs.

If livestreaming would solve one problem for your sport, what would it be?



Youth sports is motivated by community, not revenue

06

Future of Livestreaming

Simplicity converts
the market, and AI
shapes what comes
next



The simplicity unlock

Make streaming as simple as pointing a phone, and the market responds in kind, confirming every prior signal implied. Livestreaming is viewed positively by non-streamers, and current streamers say it delivers. The barriers are soft, reflecting perception rather than rejection, with many overestimating the technical skill and equipment required. As this data reveals, remove the equipment and complexity, and latent demand converts.

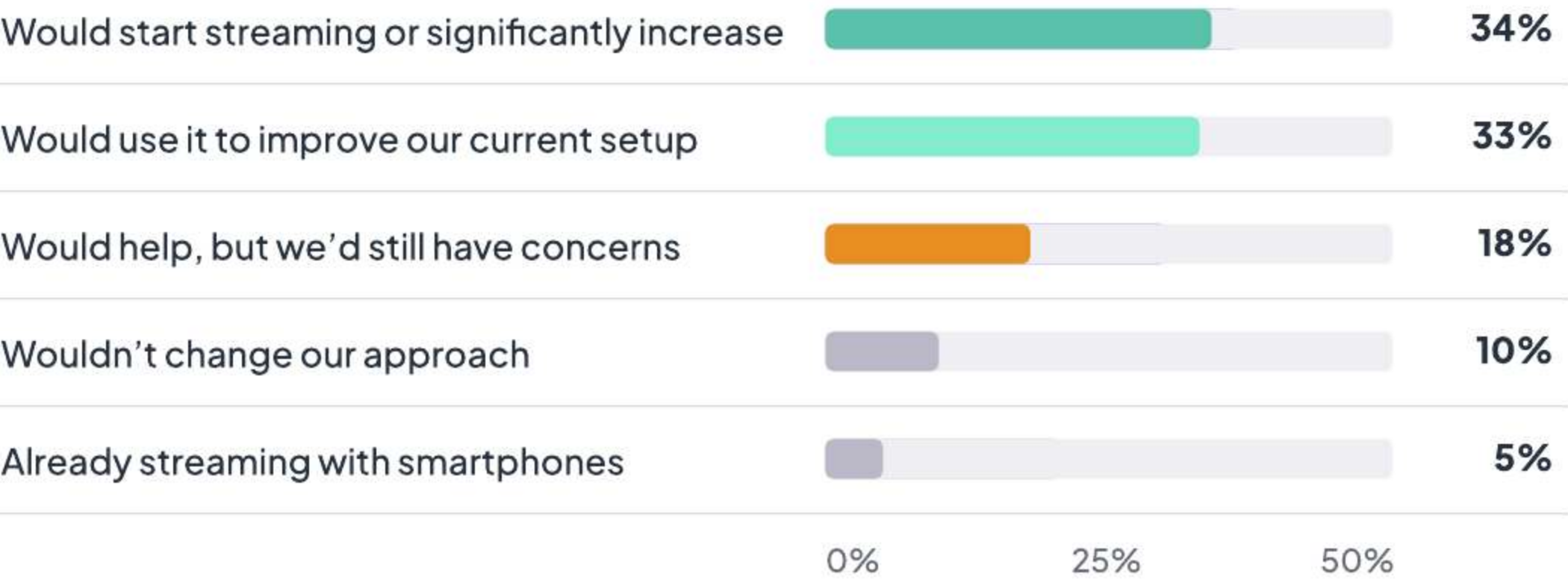
67%

would **change their behavior** directly

34%

would **start** or **significantly expand**

If parents/fans could stream from their phones, how would that change your approach?



AI Favorites Among Segments

Among streaming organizations, no single AI feature dominates and interest is spread fairly evenly across the board. As with many dimensions in this study, some distinctions come into focus once the data is segmented.

Performance analytics. While it carries broad interest at 24% , it jumps to 36% among affluent family programs that lean towards development and performance. It is also popular with Wrestling, where live stats enable real-time coaching adjustments during competition.

Instant Replay. Sitting at 21% overall, instant replays rise to 32% among organizations that are only partially satisfied with their current setup, suggesting it's the upgrade that would close the value gap. Since youth sports are built on moments, capturing them elevates a basic stream into shareable highlights.

Player identification and score overlays. This appeals most to volunteer-run productions, where automated graphics replace the manual, multi-step broadcast software (vMix, OBS) that a parent would otherwise have to set up. Certain sports also over-index here, particularly Gymnastics, Action, and Emerging sports, where viewers follow a single athlete rather than a team.



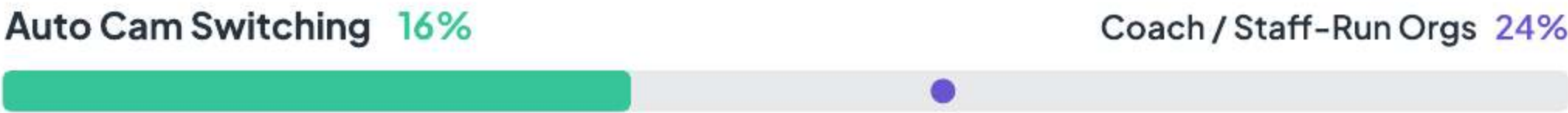
Top Sport: Wrestling



Top Sport: Field Sports - Equestrian, Archery, Golf, Shooting



Top Sport: Gymnastics / Cheer • Action / Emerging



Top Sport: Swimming / Diving



Top Sport: Volleyball

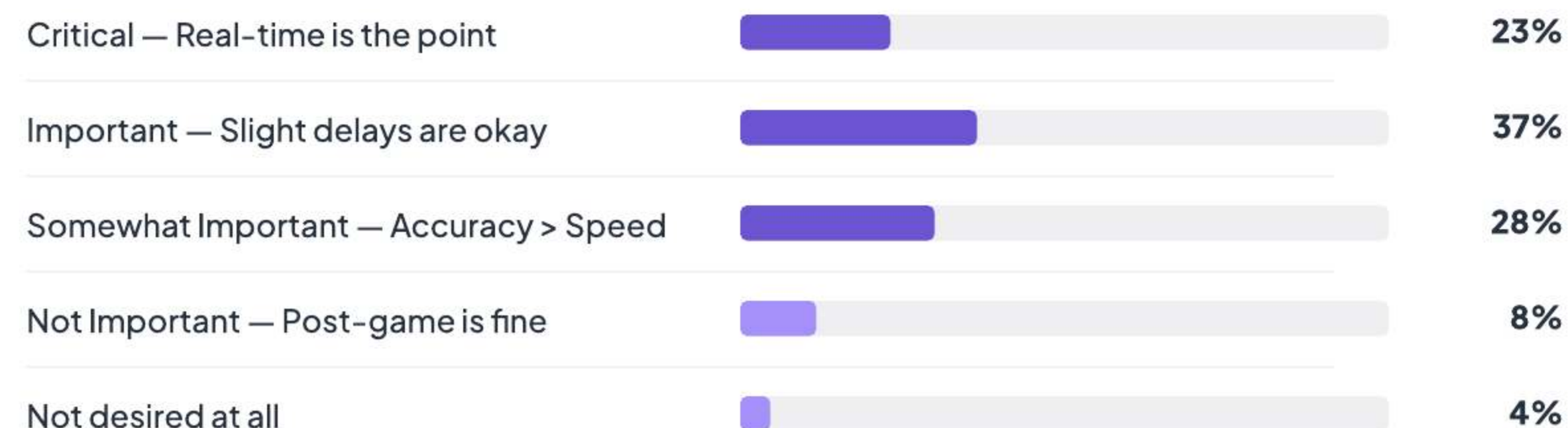
Each AI feature appeals to the broad market modestly (green), and specific groups over-index (purple).

Real-time AI is valued, but not required

Instantaneous delivery of AI information is treated as a desirable attribute rather than a strict requirement. The largest share of streamers say real-time matters but slight delays are acceptable, and a further 28% rank accuracy above speed, calling instant delivery only somewhat important. Roughly a fifth view true real-time as critical, while a small minority find it unimportant. Taken together, about two-thirds want AI intelligence promptly but explicitly tolerate latency.

Unsurprisingly, those who view real-time as critical favor AI features like performance analytics and automatic camera switching, two features where latency renders them ineffective. Both deliver value solely as the action unfolds, consistent with sports driven by time and statistics, such as swimming and baseball.

How important is it that AI information appears instantly?



23% say real-time is the point - the smallest serious camp

65% will accept a short delay or actively prefer accuracy over speed

A Closing Note for Sports Tech Providers

This year's report carries two truths at once. Livestreaming has arrived, yet its transformative potential is just coming into view. Roughly 30% of organizations stream today, with more than three quarters saying it met or exceeded their goal. Meanwhile, the other 70% are ready to embrace it. Most are warm, waiting for a version of streaming simpler than the one they imagine.

Today, most of youth sports still livestream on social media. YouTube and Facebook are ubiquitous for the simple reasons that they are free, familiar, and unavoidable with their aggregated audience. However, these attention economies are neither a safe or lasting home for youth sports. Algorithms change, feeds are addictive, and broadcasting minors to the open internet is a risk parents increasingly question. Youth sports streaming that wins the next phase will offer what social media cannot—a controlled environment limited to an approved community around a team—built natively into the tools they already use.

This is precisely where sports tech providers carry a trust and workflow advantage they have yet to leverage. Because organizations already manage teams, events, and scores in these platforms, video becomes a feature upgrade, rather than another standalone tool to manage.

As streaming technology costs continue to decline, livestream quality has decoupled from livestream complexity. A broadcast that once required a dedicated production team is now achievable from a simple setup. Reeplayr, for instance, embeds livestreaming directly into the camera, so a single autonomous unit captures and broadcasts an event with virtually no operator. Accessibility goes further still, as free mobile apps turn the smartphone everyone already carries into a powerful broadcast tool. Native Frame lowers the barrier even further. Any parent or fan can start a broadcast by scanning a QR code from their phone, with no setup or training required.

The next expectation is AI, where we predict real differentiation between livestream infrastructure providers. The standardization behind most livestream solutions makes them fast to set up, but it also imposes hard limits on integrating specialized AI models. When it comes to fine tuning player detection, automatic highlights, and live on-screen data, Native Frame is built for the iterative work that these features demand.

Whether you want to embed video into a product your users already love, or build a media platform on our infrastructure, we welcome the chance to partner with you on what comes next. Find us at nativeframe.com or reach out to Kate, our Head of Product, at kate@nativeframe.com.