

AFRICA SPORTS INDUSTRY

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THEME:

UNLOCKING THE UNTAPPED POTENTIAL: SPORTS TOURISM, TECH AND WOMEN IN AFRICA'S SPORTS ECONOMY



EXECUTIVE CHAIR'S VIEW: WILL MBIAKOP

Why Now: Africa's Sporting Future in Motion

For decades, Africa's sporting story was told through its athletes—footballers dazzling in Europe, marathoners rewriting endurance, Olympians carrying flags high on global stages. But today, the narrative is no longer just about exported talent. Sport in Africa is evolving into an industry, a marketplace, and a driver of transformation. Amongst forces are powering this shift: **sports tourism**, **women in sport**, and **technology**. Together, they are reshaping Africa's role in the global sports economy.

Sports tourism is making African cities magnets for fans and federations alike. Kigali, Accra, Rabat and Cape Town are now staging grounds for events that blend competition with culture, creating experiences as much as tournaments. Women in Sport are stepping into the spotlight—not just competing but leading. From ministers of sport to federation chairs, they are redefining the power map of African sport, driving inclusion while broadening the commercial base. And then there's technology—the great accelerator. It's collapsing old barriers, turning athletes into content creators, and opening new revenue channels in markets where traditional sports economies barely existed. With one of the world's youngest populations, Africa's digital-first generation is consuming, creating, and demanding sport in new ways. So, why now?

Because Africa's sporting future is beyond potential—it's momentum. The investments are flowing, the policies are shifting, the fans are global. ASCI presents Africa's new sporting era—where sport breaks beyond recreation to become business, diplomacy, and identity. Welcome to the Africa Sports Industry: Strength in Numbers!

EDITOR'S VIEW: RICHARD WANJOHI

Foreword: The Unrelenting Rise of African Sport

Strength in Numbers – Report No.3 opens with a simple truth: Africa's young, vibrant population and passion for sport are among the continent's greatest natural resources. With more than **70% of Africans under 30** and the population projected to represent a quarter of the world's people by 2050, sport is emerging as both an **economic engine** and a **unifying force**. The African Union's Agenda 2063 recognizes sport as a tool for participation, capacity-building, and nation-building — an essential pillar in "The Africa We Want."

Today, Africa captures less than **1% of the global sports economy**, yet the potential is immense. With smart investment, innovation, and inclusive policy, the continent's sports sector could grow by **8% annually** and contribute **5% of Africa's GDP by 2050** — a vision ASCI calls the 'Road to 5'. Digital transformation, sustainable investment, and inclusive talent pathways are reshaping the landscape, turning arenas into classrooms, data into opportunity, and athletes into ambassadors for economic and social progress.

This report has more than data analysis; it is a call to action for policymakers, investors, and citizens to build a dynamic, inclusive African sports ecosystem. Together, we can transform sport into a cornerstone of prosperity, creativity, and unity across the continent. Special thanks to Eng Okwema for the contributions, Vuyo Mundo for research excellence, Tchamba for design and visualization, and Will Mbiakop for vision and strategic direction — whose collective passion brings **Strength in Numbers — Report No.3** to life.



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SECTION 1: AFRICA'S SPORTS TOURISM ECONOMY

1.1 OVERVIEW & DEFINITION

What?

Sports tourism is one of the fastest-growing sectors within the global tourism industry. It refers to travel for the purpose of **participating in** or **watching sporting events**, **visiting sports-related attractions**, or **engaging in sports activities** as part of a leisure experience.

Why?

Sports tourism, accounting for around 10% of global tourism expenditure and projected to grow at 17.5% between 2023 and 2030, drives mass movement across regions and serves as a catalyst for social, economic, and environmental progress, leaving a lasting developmental legacy.

In 2023, the global sports tourism market was valued at US\$ 544.38 billion. It is expected to grow to US\$ 618.69 billion in 2024 and reach an estimated US\$ 2.09 trillion by 2032, reflecting a strong compound annual growth rate (CAGR) of 16.43% over the forecast period.



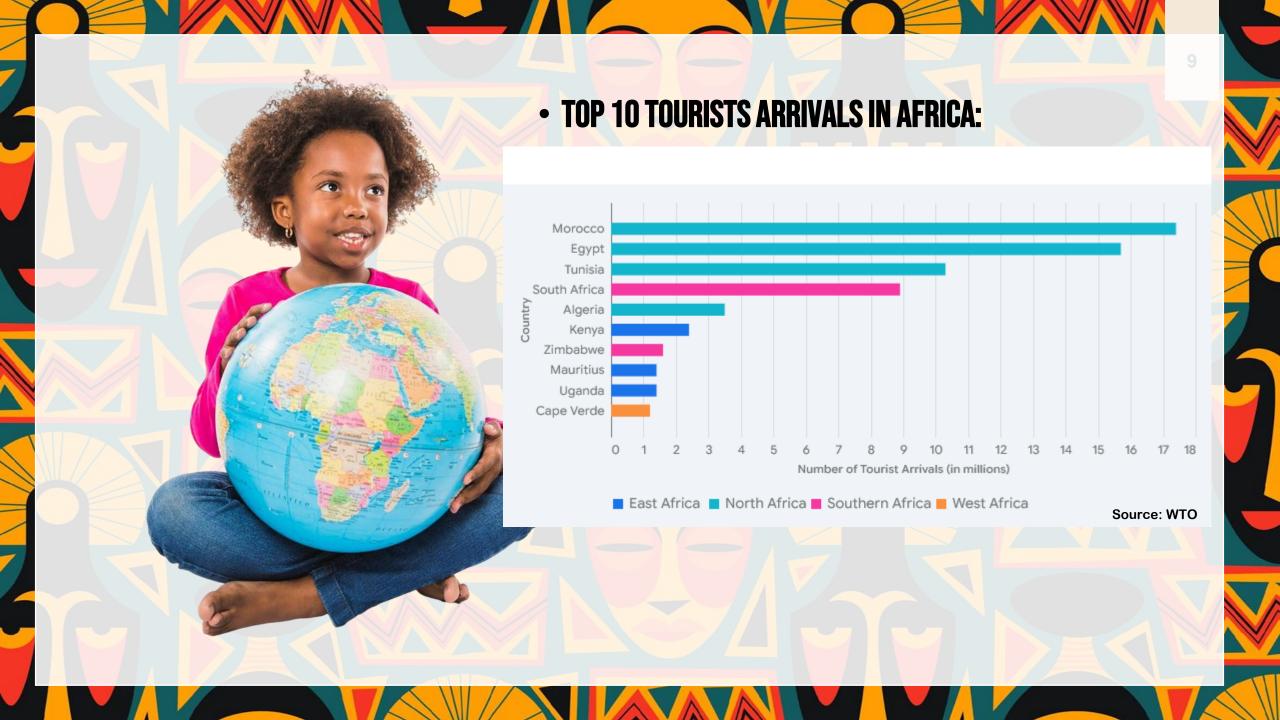
Types:

- 1. Active/Participatory Sports Tourism Travelers engage directly in sports activities. This includes athletics-related events, runs, and marathons (e.g. the Great Ethiopian Run, Lewa Safari Marathon in Kenya); cycling (Tour du Rwanda, Cape Epic in South Africa); golf (Morocco, Kenya, and South Africa) and mountaineering (Kilimanjaro in Tanzania, Rwenzori Mountains in Uganda).
- 2. Event-Based/Spectator Tourism Fans travel to attend live sports competitions: The Africa Cup of Nations (AFCON), the Safari Rally (Kenya), Basketball Africa League (BAL) games across the continent and the All-Africa Games.
- 3. Adventure and Extreme Sports Tourism This includes high-adrenaline and nature-based sports tourism: think of bungee jumping, skydiving, windsurfing, kitesurfing; white-water rafting or sandboarding.
- 4. Heritage and Nostalgia Sports Tourism Visitors explore culturally or historically significant sports venues. These include former Olympic venues, sports museums or colonial-era stadiums. Community-run sports festivals with cultural themes also fall into this category.
- 5. Recreational and Wellness-Oriented Sports Travel This involves blending light sport and leisure. Activities such as sports camps and retreats loga, hiking, beach volleyball), and family-oriented beach or safari lodges offering sports activities.

1.2 MARKET SIZE, DATA & TRENDS

Regional Comparisons and Country Specifics:

Region	Market Size & Growth	Key Events/Activities	Challenges & Opportunities
North Africa	Size: ~ USD 15. billion (from a combined 38.98 billion for MEA region) Growth: +22% in 2024 above 2019 tourism numbers; major investment in stadia & golf	AFCON 2025, World Cup 2030, golf tourism, Atlantic surfing worth targeting leisure tourists; Mediterranean Games, Pharaohs' Marathon and the Challenge of Crossing Egypt Rally; traditional sports such as the Camel Race in Sharm El-Sheikh and the Sharkia Arabian Horse Festival; others include aquatic events including surfing both kite and wind; racquetball ball games; and equestrian races.	Opportunity to combine eco-tourism (e.g. Sahara treks) with sports tourism; traditional sports such as the equestrian races bring a historical and cultural connection
East & Central	Size: ~ USD 3 billion Growth: +17.5% in 2024 driven by major sports events	Tour du Rwanda, BAL in Kigali; Rwenzori, Kilimanjaro and Nairobi Marathons; Safari Rally in Kenya; CHAN and AFCON in 2025 and 2027	Need sustainable frameworks and improved infrastructure in Central Africa
West Africa	Size: ~ USD 0.2 billion Growth: +9% year-on-year to about US\$ 5 billion by 2030. Emerging niche growth (surf tourism); mature football fan base	Youth Olympics in Senegal in 2026; Football in Nigeria/Ghana, Liberia surf tour, Afro Basketball tournaments	Infrastructure & sustainability gaps; coordination hurdles
Southern Africa	Size: ~USD 4.5 Billion (2023/24), Growth: +17.6% Driven by multiple sports events and tours	Comrades, Cape Town Cycle Tour, Cape Town ePrix, Rugby & FIFA events	Maintain growth, diversify offerings, expand regional cooperation



1.3 COUNTRY STUDIES

I. MOROCCO

By 2024, the Moroccan government reported over **17 million international tourist arrivals**, with sports events playing a growing role in attracting visitors (UNWTO, 2024). The country has successfully hosted high-profile international competitions such as the FIFA Club World Cup (2022), FIFA U-17 Women's World Cup (won the bid to host the FIFA U-17 Women's World Cup in 2025), and will host the AFCON 2025, further cementing its appeal.

Morocco's expansive investment in modern stadiums—such as the *Grand Stade de Casablanca* and *Stade Ibn Batouta* in Tangier—has positioned it as a serious player in sports mega-event hosting. Additionally, its elite sports infrastructure has been a cornerstone in its successful bid to co-host the 2030 FIFA World Cup alongside Spain and Portugal.

Morocco's example illustrates how a blended model—balancing elite international events with grassroots and adventure sports—which drive sustainable growth and global recognition in sports tourism.



RWANDA SPORTS TOURISM: A GROWING HUB

500,000+

USD 100M+

ESTIMATED REVENUE IN 2024

KIGALI: THE SPORTS CAPITAL





TOUR DU RWANDA (CYCLING) STATE-OF-THE-ART VENUES

GLOBAL PARTNERSHIPS





HIGH-PROFILE SPONSORSHIPS



MAJOR SPORTING EVENTS





AFRICUE (BAL)

PEACE MARATHON

FUTURE HORIZONS



RWANDA

As of 2022, sports tourism in Rwanda generated approximately USD 445 million, according to the Rwanda Development Board. This accounted for over 10% of the country's total tourism revenue (AS Unified, 2024). Kigali has emerged as a continental sporting capital, thanks to multi-purpose venues like BK Arena, which hosts major events including the Basketball Africa League (BAL) finals, regional volleyball championships, and international boxing contests. Rwanda's successful integration of sports diplomacy—through global tourism sponsorships with Arsenal FC and Paris Saint-Germain—has boosted international visibility and tourism inflows.

Beyond elite sports, Rwanda has also embraced participatory and adventure sports tourism. The *Tour du Rwanda*, now a premier event on the UCI Africa Tour, attracts cyclists from over 20 countries, while the Kigali International Peace Marathon continues to grow as a signature fixture for running enthusiasts. According to Rwanda's Ministry of Sports, over 500,000 domestic and international visitors participated in sport-related activities in 2023 alone. With a national vision to position Rwanda a top-five African sports tourism destination by 2030, and with steady annual increases in arrivals tied to events, the country is setting a benchmark in how small states can leverage sports for inclusive tourism-led development.

III. SOUTH AFRICA

In 2023 alone, South Africa's tourism sector generated an estimated ZAR 10.1 billion, accounting for over 25% of the entire Middle East and Africa (MEA) region's sports tourism revenue (Grand View Research, 2024). With a projected CAGR of 17.6%, the industry is forecast to reach over USD 31.4 billion by 2030. The country's successful hosting history—including the 2010 FIFA World Cup, Rugby World Cup matches, and international cricket tours—continues to bolster its credibility and international appeal.

Premier sporting events such as the Comrades Marathon, Cape Town Cycle Tour, and Cape Epic mountain bike race collectively attract hundreds of thousands of domestic and international participants each year, making a significant contribution to tourism-linked GDP. In addition to its event economy, South Africa benefits from a strong domestic travel culture and multi-sport adventure tourism offerings, including shark-cage diving, surfing, golf tourism, paragliding, and skydiving. According to the South African Department of Tourism, the country welcomed over 29,000 sports tourists in the first half of 2023 alone, with an estimated economic impact of ZAR 3.6 billion (USD 190 million) in just six months (Tourism Update, 2024). Government initiatives, such as the National Sport and Recreation Plan and collaborations with local tourism boards, are now pushing to harness rural and township sports programs to further drive inclusive tourism. South Africa's model illustrates how combining elite competition, mass participation events, and adventure sports can yield a diversified and resilient sports tourism economy.

SOUTH AFRICA SPORTS TOURISM ESTIMATED 2024































IV. SENEGAL

Senegal is strategically positioning itself as a sports tourism leader in Francophone West Africa, blending a vibrant cultural identity with growing international sports visibility. The country made history by securing the rights to host the 2026 Summer Youth Olympic Games in Dakar —the first Olympic event to be held on African soil. This landmark event has already spurred major investments in infrastructure, including the US\$200 million Olympic Village, the Dakar Arena, and upgrades to Léopold Sédar Senghor stadiums and other regional venues.

The Senegalese government projects the Youth Olympics will generate over US\$500 million in direct and indirect tourism-related economic activity, including event hosting, accommodation, transportation, and local retail.

Dakar's rapidly modernizing transport and hospitality infrastructure, combined with its status as a cultural capital, further strengthens its appeal as a sports tourism destination.

SENEGAL SPORTS ECOSYSTEM

DAKAR 2026 & BEYOND























PARIS-DAKAR RALLY Potential Return?

Strong League

INVESTMENT. INFRASTRUCTURE. DEVELOPMENT.





SENEGAL SPORTS TOURISM

0

10%

of GDP contribution from tourism

\$500
million
projected tourismrelated economic
activity



DAKAR MARATHON

TRADITIONAL WRESTLING

YOUTH OLYMPICS (2026)

Senegal's sports tourism ecosystem extends well beyond elite events. Dakar hosts the *Marathon Eiffage du Sénégal*, attracting thousands of participants annually from across the region and Europe. Traditional wrestling, or *la lutte sénégalaise*, continues to draw massive crowds domestically, with sold-out arenas and growing interest from diaspora tourists and cultural researchers.

According to the Senegalese Ministry of Tourism, the tourism sector contributes around 10% of the national GDP, with a rising share linked to sports-related activities—especially during major football events and the wrestling season. Additionally, Senegal's victory in the 2021 Africa Cup of Nations sparked a surge in fan-based travel across West Africa. With ongoing public-private sector collaborations and Dakar's emerging role as a continental sports capital, Senegal is well-positioned to establish sports tourism a long-term pillar of its national development and soft power strategy.

1.4 CHALLENGES

Despite the promising numbers and growing potential of sports tourism across Africa, several persistent challenges continue to hinder its full development as shown alongside:

Category	Challenge	Description / Example
A. Infrastructure	Inadequate sports facilities	Many African countries lack modern stadiums, training centers, or accommodation near sports venues.
	Poor transport connectivity	Limited international flight routes, deteriorating road infrastructure, and unreliable local transport networks restrict tourist mobility and event accessibility.
B. Security & Safety	Political instability and insecurity	Regions facing terrorism, political unrest, or high crime rates deter international visitors.
	Event safety management gaps	Inadequate crowd control systems and weak emergency response capabilities pose safety risks during large-scale sports events.
C. Policy & Investment	Limited government prioritization	Few national tourism strategies integrate sports tourism as a core focus area. Only a handful have clear policy frameworks guiding sports sector growth.
	Inconsistent funding or PPP models	Sports initiatives often rely on short-term donor or private support without sustainable financing structures.
D. Marketing & Branding	Weak international visibility	Many African sports events and destinations lack global marketing or media partnerships.
	Poor digital promotion	Limited use of digital platforms, storytelling, or influencer marketing to promote sports offerings.

	Category	Challenge	Description / Example
E.	Human Capital	Skills gaps in tourism and event management	There is a shortage of trained professionals in areas such as sports event planning, hospitality management, and sports marketing.
		Language and service quality barriers	Inconsistent service delivery and limited multilingual capacity in tourist-facing roles affect the overall visitor experience.
F.	Seasonality & Predictability	Few year-round events	Many countries depend on one or two major seasonal events, resulting in revenue and employment volatility throughout the year.
		Weather and climate disruptions	Rainy seasons or extreme heat can disrupt outdoor sporting events.
G.	Data & Measurement	Lack of sports tourism-specific data	Most countries do not collect, track or publish/report disaggregated data on sports-related travel, visitor demographics or economic contributions.
		Informal economy dominance	Many economic activities (e.g., vendor sales, transport) remain unrecorded, underestimating real impact.
Н.	Post-Event Sustainability	Underutilized infrastructure post-events	Sports facilities built for major tournaments are often left idle due to a lack of long-term programming, community access, or maintenance plans.



1.5 OPPORTUNITIES & POLICY PATHWAYS

Regional Tourism Circuits

- 1. Africa's global sports tourism market is projected at USD 610 billion, growing at approximately 17.5 % annually.
- 2. Implementing AfCTA to facilitate and grow intra-African trade and commercial activities.
- 3. Design cross-border event circuits: e.g., East African running & cycling tours tethered with safaris.
- 4. Foster visa facilitation & regional air connectivity for seamless multi-country packages e.g. airline partnerships such as Rwanda, Kenya and Burkina Faso to link East and West African markets
- 5. Empowering regional bodies like ECOWAS to anchor multination sports circuits—such as marathons, martial arts, or cycling events—as tools of cultural diplomacy and regional unity.



Public-Private Partnerships

- The UNWTO and governments such as Tanzania, Mauritius, Zambia are issuing investment guides to spur PPPs in tourism infrastructure and event hosting.
- The Rwandan government has invested over USD 500 million in sports infrastructure (basketball, golf, cricket, stadium upgrades) for over a decade.
- The Kenyan government and Kenya Tourism Board raised USD 20 million recently to develop sports facilities via PPP-like structures. This has led to construction of the first major stadia built in over 40 years, along with circuits for cycling, hiking and rallying to enhance sports and outdoor experiences.

Recommendations

- Incentivize private investors with tax breaks, matched funding, and long-term usage rights for stadiums, training centers, and hospitality assets.
- Integrate community ownership clauses, ensuring event revenue benefits flow to grassroots infrastructure, talent development, and SMEs.
- Establish multi-sector PPP bodies, including conservation agencies and local operators.





Sports event impact measurement frameworks

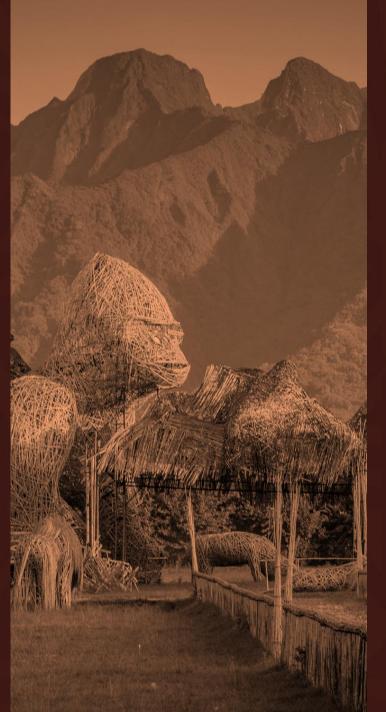
are essential tools for assessing the outcomes and value of hosting sporting events, especially within the growing sector of sports tourism in Africa. These frameworks help quantify and qualify the economic, social, environmental, and brand impacts of sports events, which is critical for guiding policy, investment, and legacy planning.

1. Economic Impact Assessment

<u>Measures</u>: Visitor spending, job creation, local business revenue, infrastructure investment.

Examples:

- * The Cape Town Sevens in South Africa contributes significantly to tourism and hospitality revenue during the event period, with thousands of international fans boosting the local economy.
- ** The 2019 African Games in Rabat, Morocco attracted about 25,000 athletes and officials. Reports highlighted over \$50 million in economic benefits from hotel revenue, transportation, and local services.



2. Social and Community Impact Evaluation

<u>Measures:</u> Community engagement, social inclusion, volunteerism, youth development, local pride.

Example: Marathon des Sables in Morocco promotes local culture and encourages community participation, building pride and global recognition for remote regions.

3. Environmental Sustainability Metrics

Measures: Carbon footprint, waste management, sustainable transport, eco-tourism integration.

Example: The Kigali Peace Marathon incorporates tree planting and eco-friendly logistics as part of its commitment to green sports tourism, as does Standard Chartered Nairobi marathon.



4. Destination Branding and Media Value Analysis

<u>Measures:</u> Media exposure, digital engagement, increased tourism interest, reputation building.

Example: AFCON 2023 in Côte d'Ivoire significantly elevated the profile of Abidjan and other host cities, creating long-term tourism opportunities through global media visibility.

5. Legacy and Infrastructure Utilization

<u>Measures:</u> Post-event use of stadiums/facilities, long-term programs, tourism asset development.

Example: Senegal's Dakar Arena, built for continental basketball events, has become a key venue attracting international tournaments and boosting tourism year-round.

6. Policy and Investment ROI Frameworks

Measures: Return on public-private partnerships, policy coherence, regulatory support.

Example: Rwanda's investment in the BK Arena and hosting of the Basketball Africa League (BAL) is measured against national goals of boosting high-value tourism and positioning Kigali as a conference-sporting hub.





Why Sports Tourism Deserves National Priority in Africa

A Trillion-Dollar Global Market

The global sports tourism industry generated USD 683B in 2023 and is projected to surpass USD 2.1T by 2030 (CAGR 17%+). Far from niche, it is a high-growth driver of global travel and leisure.(*Grand View Research*). South Africa alone generated USD 10.1B in 2023 from sports tourism and is forecast to hit USD 31.4B by 2030. The country contributes more than 25% of all MEA sports tourism revenue, proving how African markets can lead regionally.

Sports events deliver measurable returns: visitor spend, tax revenues, hospitality jobs. Flagship global tournaments like the Australian Open inject hundreds of millions annually into host economies — a model replicable in African cities with strong infrastructure.

Sustainable sports tourism is diversified: marathons, cycle tours, adventure sports, domestic leagues. South Africa blends its 2010 FIFA World Cup legacy with mass participation and adventure tourism, spreading benefits across regions and seasons.

Beyond economics, sports tourism drives:

- National branding and soft power
- Community development (township & rural programs)
- Skills growth in hospitality & event management
- Increased FDI via proven hosting capacity

UN and industry briefs show sports as a top global driver of incremental hotel demand.

Sports tourism is one of the fastest-growing segments of global travel, with clear evidence of GDP growth, job creation, and nation branding benefits. African countries that commit to robust data, governance, and diversified event strategies can transform sports into a predictable engine of tourism and development







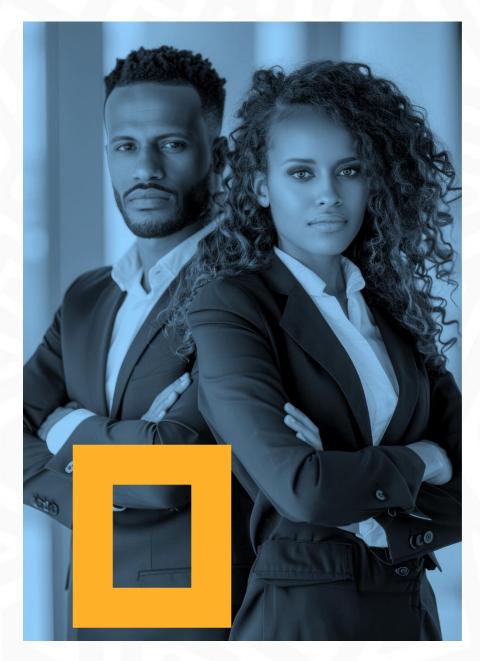
1. Digital Transformation as a Game-Changer

Over half of industry professionals in Africa identify digital transformation—spanning streaming platforms, fan engagement tools, and advanced sports analytics—as the key driver of sector growth. These innovations are:

- Enhancing fan experiences through real-time content and interactive platforms.
- Improving player and team performance via data-driven decision-making and wellness monitoring.
- Unlocking new revenue streams, including direct-to-consumer models and digital sponsorships.

Examples:

Platforms like **ScoreGrid** (South Africa) offer visual analytics that deepen fans' understanding of live games, while **Eksab** (Egypt) delivers fantasy sports and prediction games that engage a new generation of sports fans online.



2. Investment Growth and Market Expansion

The sports tech sector is attracting increased funding in investment and sponsorship allocations projected to rise by **5–10%** in 2025. However, challenges such as weak governance, economic instability, and limited market data continue to constrain the ecosystem's full potential.

Examples:

Startups like **Enda Athletic** (Kenya), which manufactures running shoes, and **MatchKit.co** (South Africa), which helps athletes commercialize their careers, have secured funding and are scaling their operations.

3. Grassroots Development and Governance Reform

More than 64% of stakeholders emphasize the need for investment in grassroots sports and governance reforms to ensure long-term sustainability and inclusivity. Technology is being leveraged to:

- Expand access to sports in rural and underserved communities.
- Support talent identification and youth development programs.
- Enhance transparency and accountability within federations and clubs.

Example:

The NBA Triple Double Accelerator program, which offers opportunities to Africa sports tech entrepreneurs to showcase their talents and innovations and stand a chance to win 50K in funding.

No.	Company	Country	Value Proposition	Valuation (Est)
#1	<u>Nergii</u>	South Africa	Performance-enhancing shoe insoles that use bio-energy technology to boost athlete energy and recovery.	~ Valued at approximately USD 1.7 billion following a recent investment by Silverbacks Holdings.
#2	<u>Eksab</u>	Egypt	A fantasy sports and prediction gaming platform that engages fans digitally.	Growing rapidly, with an estimated valuation of around USD 5-10 million (early stage).
#3	Enda Athletic Sportswear	Kenya	Produced sustainable, locally made running shoes targeting athletes and casual runners.	Valued at around USD 10 million, with steady growth and a social impact focus.
#4	ScoreGrid	South Africa	A live game analytics and visualization platform for fans and broadcasters.	Estimated valuation near USD 5 million, expanding media partnerships.
#5	<u>ArqamFC</u>	Egypt	Football data analytics tailored to emerging African markets	Valued at approximately USD 4 million, with a growing client base in North Africa.
#6	<u>myFanPark</u>	South Africa	Digital fan engagement platform connecting fans with athletes and celebrities.	Early-stage valuation of around USD 2-4 million, with increasing digital sponsorships.
#7	<u>TixdotAfrica</u>	Nigeria and Pan-African (operating in multiple countries)	Event management and ticketing technology serving sports and entertainment events.	Valuation estimated at USD 3-6 million, with growing adoption in major cities.
#8	Salubata	Nigeria	Eco-friendly sports shoes and apparel integrating sustainability with performance.	Valued at approximately USD 7-10 million; an NBA Africa Accelerator alum with a strong social impact focus.
#9	Gamr Africa	Nigeria	Organizes eSports tournaments, connects gamers, and offers infrastructure for African gaming growth.	Estimated valuation of around USD 3- 5 million.
#10	Brila Media/Brila Live	Nigeria	A sports streaming and audio broadcasting platform combining live radio, digital content, and fan engagement.	Estimated valuation of approximately USD 1-2 million.

Links: https://launchbaseafrica.com/2024/08/09/investment-firm-taps-into-african-sports-tech-market-with-nergii-deal/

Mapping key African sports tech start-ups, hubs, accelerators



As shown on the map above, Africa has only one recognized sports tech hub or accelerator programme. The **NBA Triple Double Accelerator Programme**, which launched in 2024 and aims to support sports tech startups and entrepreneurs in building solutions for the sports ecosystem.

Given the growth of other technology sectors: such as fintech, health-tech, agro-tech and ed-tech—sports may represent the next major growth opportunity. With a dearth of data and relevant information, technology becomes a critical enabler in the sports sector.

While the NBA's programme leads the way, where are the other technology and business players?





2.2 Investment Landscape

Who is funding sports tech in Africa?

Funding for sports tech in Africa is still at an early stage but is gaining momentum through a mix of venture capital, government initiatives, corporate partnerships, accelerators, and international NGOs.

Below is an overview of the key players and emerging trends driving investment in the sector:





2.2.1 Venture Capital and Angel Investors

Venture capitalists are gradually warming to sports tech due to its overlap with media, fintech, gaming, and entertainment.

, g	
Top 20 Sports Startup Investors in A	Africa - May 2025
Investor(s)	Sports Africa Investments
54 Collective	2
MNF Ventures	2
Gray Matters Capital	1
4DX Ventures	1
Africinvest	1
NEXT176	1
Robert Herjavec	1
Johnson & Johnson Foundation	1
EchoVC Partners	4
Nour Nouf Ventures	1
Nour Nour Ventures	1
Ventures Platform	
	1
Justin Stanford	1
Flat6Labs Tunisia	'
	1
Tofino Capital	
A www. Comital	1
Aruwa Capital	1
Talanton	
	1
4DI Capital	1
Mizizi Africa Consumer Holdings	1
mizizi Antou oonounier Holulligo	1
Knife Capital	
	1



Current Players:

- a. Ventures Platform (Nigeria) has backed eSports and gaming-related platforms such as Gamr Africa.
- **b.** <u>Kepple Africa Ventures (Japan-Africa)</u> invests in digital consumer products including sports engagement tools.
- **c.** Future Africa shows interest in youth-focused tech, including sports-adjacent innovations.
- **d.** <u>DFS Lab</u> supports mobile-first and fintechrelated ventures, some of which overlap with fantasy sports and fan loyalty platforms.

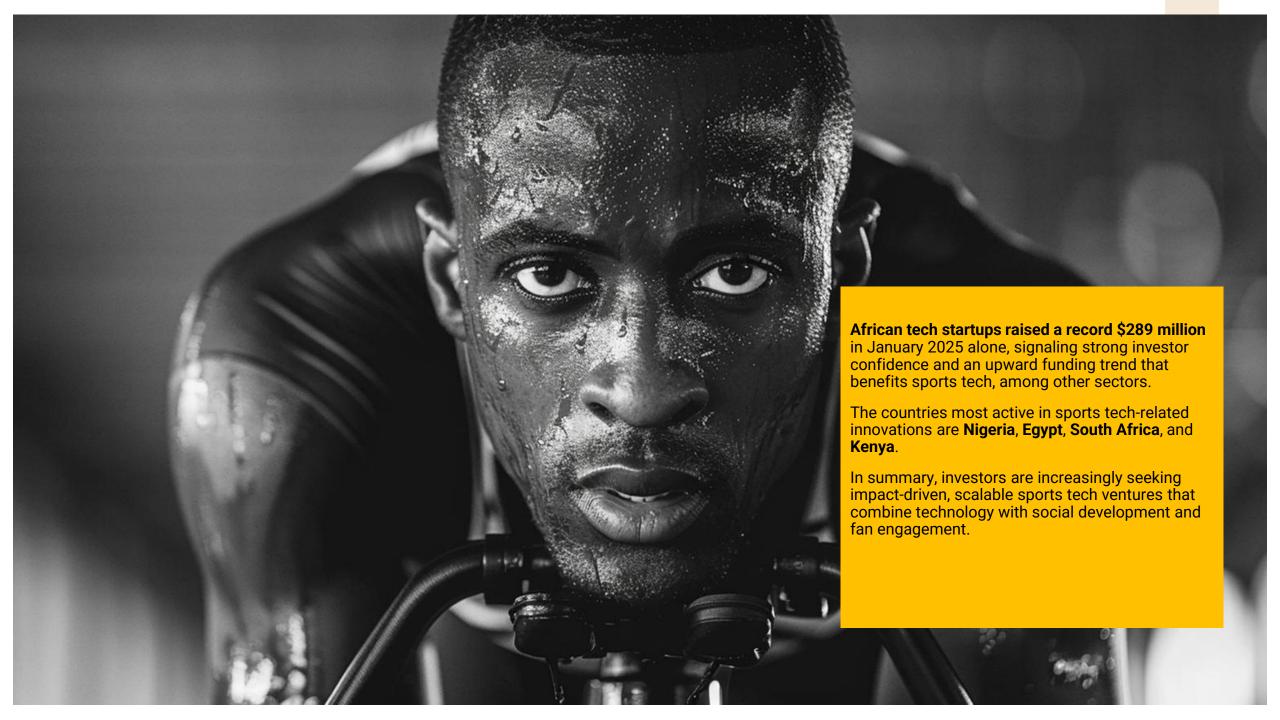
Others:

- 54 Collective and MNF Ventures are among the most active venture capital funds investing in African sports startups, each making multiple sports tech investments.
- 4DX Ventures, EchoVC Partners, AfricInvest, Flat6Labs Tunisia, Ventures Platform, and Knife Capital, which provide seed and early-stage funding across the continent.



Strategic angel investors and networks such as <u>The Cairo Angels Syndicate</u>, <u>Nour Nouf Ventures</u>, also contribute capital and mentorship. In early 2025, the <u>African Business Angel Network (ABAN)</u> launched the African Sports & Creative Early-Stage Investor Network: a dedicated platform to mobilize angel capital for sports and creative startups. This initiative brings together industry leaders like TRACE, El Carnaval Limited, and Punuka Attorneys & Solicitors to provide funding, mentorship, and market access tailored to the unique needs of sports tech entrepreneurs.





2.3 INNOVATION USE CASES

No.	Technology	Use Case(s)	Impact
1.	Wearable Technology & Data Analytics	Playermaker - boot-mounted sensors to monitor heart rate, speed, endurance, and movement patterns. Teams and athletes across Africa are using smartwatches and fitness trackers like those mentioned above.	Real-time data to tailor training, prevent injuries, and optimize performance, leveling the playing field with global competitors.
2.	Smart Stadiums & Cashless Infrastructure	Stadiums are integrating high-tech scoreboards, interactive fan zones, and cashless payment systems (RFID wristbands, mobile wallets). Examples include; BK Arena in Kigali, Rwanda, and <i>Stade d'Ebimpé</i> (Alassane Ouattara Olympic Stadium) in Abidjan, Côte d'Ivoire.	Elevate the spectator experience, streamline operations, and provide valuable data to organizers. This also supports emergency preparedness, security coordination, and crowd control.
3.	Digital Fan Engagement & Broadcasting	Clubs and federations use social media, mobile apps, and streaming platforms (SuperSport, Showmax Pro, StarTimes) to reach fans, share exclusive content, and provide interactive experiences.	Digital broadcasting expands the reach of local leagues and athletes, boosts sponsorship opportunities, and brings African sports to global audiences.
4.	Virtual Reality (VR) & eSports	VR is used for immersive training simulations, while eSports is growing rapidly in Kenya, Nigeria, and Morocco, with tech hubs in Nairobi and Lagos hosting tournaments and nurturing talent.	VR enhances strategic thinking and reaction times; eSports creates new career paths and fan communities among Africa's youth.



2.3 INNOVATION USE CASES (CONTINUED)

No.	Technology	Use Case(s)	Impact
5.	Al-Assisted Scouting & Pitch Monitoring	Organizations like KickStart Ghana and Right to Dream use Al and digital tools for scouting, pitch monitoring, and athlete development, especially in rural areas.	It bridges the urban-rural, uncovers hidden talent, and enhances training and facility management.
6.	Fan Apps & Real-Time Updates	Mobile apps provide live scores, real-time updates, and interactive experiences, deepening fan engagement and fostering community. Betting and gaming companies have excelled at this, creating engaging digital experiences for fans.	It fosters a more connected, informed, and loyal fan base.
7.	Biomechanics & Motion Capture	Motion capture and biomechanics tools analyze athlete movement for technique improvement and injury prevention. Examples include Nike and On sneakers which are leveraging technology to improve performance and reduce injuries	This enables targeted performance improvements and reduces injury rates for African athletes.
8.	Blockchain & Tokenization	Platforms like TrendX in Nigeria and Kenya are tokenizing sports talent—allowing fans to invest in athletes and clubs—while using blockchain to ensure transparent talent discovery and funding.	It democratizes access to athlete resources, creates new funding models, and opens sports investment to a wider audience.



2.4 KEY BARRIERS:

Key Barrier	In Detail
 High Cost and Limited Availability of Technology 	This remains a major barrier to access and inclusion. Specialized equipment—particularly wearables essential for performance tracking and accessibility for persons with disabilities—is often unaffordable for many African athletes and organizations due to reliance on imports.
 Limited Access to Stable Internet and Digital Infrastructure 	Many regions—especially rural and low-income areas—struggle with unreliable internet connectivity and inadequate digital infrastructure. This limits access to cloud-based analytics, live streaming, and digital fan engagement platforms.
❖ Inadequate Infrastructure and Equipment	Many communities and learning institutions lack basic sports facilities, equipment, and maintenance, making it difficult to implement or benefit from new technologies.
❖ Lack of Funding and Investment	Weak institutional support, poor understanding of sports business potential, and difficulty convincing sponsors and investors result in chronic underfunding. This affects everything from grassroots initiatives to elite sports tech startups.
❖ Digital Literacy Gap	Limited digital skills among coaches, athletes, and administrators hinder the effective adoption and use of new technologies and platform.
♦ Weak Governance and Policy Support	Governance issues, economic instability, and the absence of enabling policies slow down innovation and deter investment. There is a need for more supportive regulatory frameworks and intellectual property protection.
 Disconnect between Policymakers and Youth 	There is often a gap between what young innovators need and what support structures provide, leading to missed opportunities and underutilized talent.
❖ Data Limitations	Lack of reliable data collection and access hampers the ability to make informed decisions, detect opportunities, and measure the impact of sports tech interventions.
❖ Dysfunctional School Sports Systems	In many areas, particularly townships and rural schools, sports programs are poorly funded, lack facilities, and are not integrated into school curricula. This limits talent identification and the early adoption of sports tech.
❖ Socio-cultural Barriers	Stigma, especially around disability and gender, can limit the adoption of assistive and inclusive technologies in sports.

2.5 **FUTURE FORWARD**: AFRICA'S PLACE IN GLOBAL SPORTS TECH

Activity	In Detail	Opportunity
Africa as a Mobile-First Innovation Hub	Africa's leapfrogging of legacy systems—particularly through mobile technology—is driving unique innovations in: - Fan engagement (fantasy sports, live audio/video apps) - Mobile sports betting - Athlete talent discovery and digital scouting - Micro-transaction-based platforms for ticketing and content	This positions Africa as a testbed for low-cost, high-reach sports tech solutions that can be replicated across other emerging markets globally.
Innovation in Inclusive and Affordable Tech	Africa's sports tech ecosystem is being shaped by a strong social impact lens. Startups and initiatives are prioritizing: Low-cost wearables (e.g., Keba Africa) Assistive technologies for inclusive participation Al tools for coaching in underserved communities	This makes Africa a global thought leader in frugal innovation—developing impactful, affordable solutions for both elite and grassroots sports.
Rapid Digital Adoption	Digital advancements—such as streaming platforms, fan engagement tools, and performance data analytics—are transforming African sports at all levels.	This widespread adoption is elevating fan experiences and unlocking new revenue streams through direct-to-consumer models and enhanced sponsorship opportunities.
Strategic Positioning in the Global South	Africa is becoming a strategic partner in South-South collaboration in sports tech, alongside Latin America and Southeast Asia. Initiatives such as: The African Continental Free Trade Area (AfCFTA) G20 and BRICS are considering sports initiatives including grassroots program and trade collaboration	These frameworks enable cross-border commercialization and global competitiveness for Africa's sports tech ventures.
Increasing Investment and Sponsorship	A projected 5–10% increase in investment and sponsorship within the African sports sector reflects growing confidence and interest in its potential.	This financial momentum is vital for scaling innovation and expanding the reach of sports tech solutions across the continent.



A global transformation is underway in women's sports — one that is impossible to ignore. Valued at \$145 billion in 2023, the women's sports market is projected to surge to \$256.67 billion by 2030. This momentum presents a clear call to action: women's sports can no longer remain on the sidelines of investment, visibility, or policy.

In Africa, the momentum is gathering pace. With the rise of continental women's leagues such as the CAF Women's Champions League and landmark partnerships like the NBA and BAL's expanded programs for girls, strong foundations are being laid. Yet the investment gap remains significant. For example, less than 10% of sponsorship revenue in African football is allocated to women's teams.

If African countries and stakeholders tap into this global wave, the continent can position its women athletes, leagues, and sports entrepreneurs not as a footnote—but as key drivers of the next billion-dollar frontier in global sports. This is not just a moral imperative; it is an economic one.

3.1 GENDER SNAPSHOT

Global vs Continental Snapshot: Metrics, Representation and Momentum

1. Olympic Representation and Performance

- Gender Parity: Paris 2024 achieved the first true gender parity (5,503 women to 5,712 men = 11,215 athletes), making it the first fully gender-balanced Olympic Games in history.
- □ Event Distribution: 329 medal events in total 157 men's, 152 women's, and 20 mixed-gender competitions.
- Sports Balance: 28 of the 32 sports achieved full gender equity in participation.
- □ **Leadership representation**: Female IOC membership rose from 20 out of 106 members (18.9%) in 2011 to 44 out of 107 members (41.1%) in 2023.

2. Women's Football: Continental Snapshot

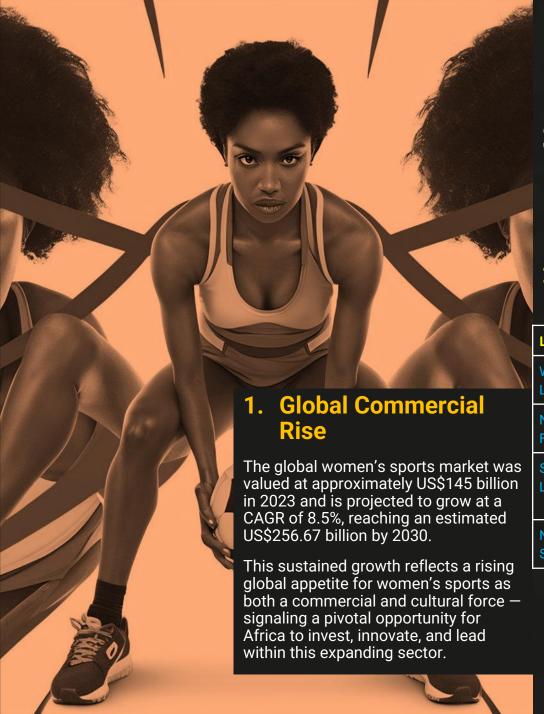
- Globally, women's football generated over \$500 million, representing approximately 45% of total women's sports revenue.
- FIFA reports **16.6 million women and girls** in organized football globally—up approximately **25% since 2019.** 9.
- In Africa, the Women's Africa Cup of Nations prize fund rose from USD 975,000 to USD 2.4 million, and the 2022 championships attracted an average match attendance of 45,562 fans.

3. Women's Rugby 7s Growth

Women's rugby contributes over USD 2 billion in global social value with each player averaging USD 3,132 compared to USD 1,900 for men—highlighting the higher value of the women's game. A 10% increase in participation could yield an additional USD 2.8 billion in value.

Community participation rose to 8.46 million in 2023, an 11% year-on-year increase, with nearly 25% being women.





3.2 WHERE WE STAND: CURRENT METRICS

2. League-Specific Growth

League	Value in 2022/23	Value in 2023/24	Projected Value in 2024/25
Women's Super League (UK)	\$65 million	\$88.7 million (+35% growth)	\$118.8 million (+34% growth)
NWSL Partnership Revenue	\$200 million	\$710 million (+255%)	\$1 billion (+41%)
SAFA Women's League (South Africa)	~\$1.25 million(17 million Rand + 5 million Rand) for 3 years	3-year deal	3-year deal
Namibia's Women's Super League	\$142,170	~ \$142,170	~ \$142,170



3.3 EMERGING TALENT: THE ICONS SHAPING THE FUTURE

- Star-driven growth: Global icons like basketball's Caitlin Clark, Coco Gauff (tennis) and Simone Biles (gymnastics) have propelled the respective sports, with WNBA viewership and match-day attendance reaching record numbers.
- Emerging leagues and stars: The new 3x3
 Unrivaled women's basketball league raised \$35
 million in Series A funding, backed by investors
 like Juju Watkins, Dawn Staley, and Coco Gauff.
- African Stars: In women's rugby, Nadine Roos (South Africa) and Grace Adhiambo Okulu (Kenya) are rising stars in the Sevens format, following standout performances at the Rugby Africa Women's Sevens 2023 Championship. Faith Kipyegon won a gold and a silver at the Olympics and broke two world records in the 1,500m and 5,000m events in 2024/25.

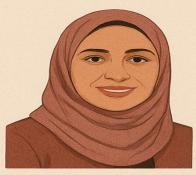


3.4 WOMEN IN **SPORTS LEADERSHIP**

Key progress points for women in sports leadership in Africa:

- Increased Representation: More women are now serving on national sports committees and continental federations, though a significant gender gap remains.
- Targeted Initiatives: Organizations like the African Women in Sport Association (AWiSA) and various development programs are actively promoting female leadership through mentorship and training.
- Athlete Advocacy: Prominent female athletes are leveraging their platforms to advocate for gender equality, fair pay, and better conditions for women in sports.
- **Government Support:** Some African governments are implementing policies to increase the participation of women in sports and leadership roles.
- Inspirational Role Models: The rise of figures like Kirsty Coventry creates visible and tangible examples of what is possible, inspiring a new generation of female leaders.

WOMEN IN SPORTS LEADERSHIP







Feryal Abdelaziz **EGYPT**

Dr. Lidi Bessi Kama Grace Kiraguri Minister of Sports Togo

Chairperson Resource Mobilisation, African Women in Sports Initiative (AWISI)



Nelly Mukazayire Minister of Sports Rwanda



Clare Akamanzi **NBA** Africa



Kirsty Coventry Current IOC President Zimbabwe

3.5 WOMEN COMPETITIONS

Platforms, Media, Grassroots Training Programs

Across the continent, female participation in both grassroots and mainstream sports still falls below 50%. Access to training facilities, experienced and gender-responsive coaching, and consistent tournament exposure remains limited.

Media coverage of women's sports remains skewed. For example, at Paris 2024, women sports events received less than 20% of total sports media coverage.

However, this is changing as women-specific leagues and competitions gain wider appreciation from both live and TV audiences. The WNBA averaged 1.2 million viewers across all ESPN platforms during the 2024 regular season (+170% vs. 2023), with 22 games surpassing 1 million in TV ratings. The UEFA Women's competition and WAFCON in Africa are expected to see a spike in interest during the current period from July to August 2025. In Europe, female interest in football stands at 42%, according to the TGM Global EURO 2024 Report.



PRIZE MONEY 100% INCREASE

USD 1,000,000

RUNNER UP (I) USD 500,000

USD 350,000

FOURTH PLA

USD 300,000

USD 200,000 (X 4)

3RD OF THE GROUP (1) USD 150,000

4TH OF THE GROUP (3) USD 125,000 X 3

TOTAL

USD 3,475,000



3.6 CHALLENGES AND STRATEGIES TO CLOSE THE GAP

3.5.1: Challenges

- Funding and Infrastructure Gaps Women's teams receive significantly less support. For example, the Football Kenya Federation (FKF) allocated approximately U\$\$ 254,000 (KES 33 million) to develop the women's game, compared to around U\$\$ 1.07 million (KES 139 million) for the men's game leading to chronic shortages in equipment, facilities, and travel budgets.
- 2. Media visibility and Pay Inequality Globally, women's sports receive only 16% of media coverage and under 10% in traditional news outlets in Africa. Sports media remains overwhelmingly male-dominated, with 90% of editors and 95% of TV anchors being male. In the English Premier League's women's division, players earn an average of \$1,250 compared to \$81,500 for their male counterparts. In disciplines such as tennis, the women players' union has come under scrutiny, requesting a review of prize money allocations at the Grand Slam tournaments the Australian Open, US Open, French Open, and Wimbledon.
- 3. Data and Governance Deficits Most African sports ministries or ministries overseeing sports lack gender-disaggregated statistics. Only 3 of 54 African football federations are led by women, underscoring serious imbalances in policy and decision-making.

3.5.2: Funding and Sponsorship Models for Women's Sport

The current state of women's sports, especially in Africa, calls for a better model of funding and sponsorship. This can be guided as follows:

Guiding Principles:

- **Equity-Driven**: Ensure women's sports are not treated as secondary to men's sports.
- Visibility-Focused: Prioritize digital and media exposure to boost value.
- Community-Centered: Engage fans, youth, and grassroots networks as key assets.
- Innovation-Led: Leverage technology to track, evaluate, and report ROI on sponsorship.

Core Funding Models

1. Public-Private Partnership (PPP) Model -

One of the most common approaches, where governments provide infrastructure and tax incentives, while private entities contribute sponsorship, technology, and event operations.

Example: Morocco's Ministry of Sports, *Royal Air Maroc*, and TotalEnergies partnered in WAFCON for the three-year period from 2022 to 2025.

Recommendation: Adopt national leagues and pan-African women's tournaments (e.g., the CAF Women's Champions League) with public visibility KPIs and gender-responsive budgeting.







2. Tiered Sponsorship Model - This structure categorizes sponsors into Gold, Silver, Bronze, and Community tiers to align with brand goals and budgets.

Benefits: Provides accessible entry points for small African businesses, while allowing large brands to invest across categories such as apparel, health, and media.

Example: FIFA Women's World Cup sponsorship tiers include Visa and Coca-Cola as top-tier sponsors. An optional "Purpose Tier" can be added for sponsors aligned with SDG 5 (Gender Equality).

 Integrated Media-Rights + Sponsorship Model - This model offers a package that combines media rights (TV, OTT, YouTube, TikTok) with naming rights, signage, and social media content sponsorship.

Example: The WNBA's multi-platform deals with Amazon Prime, Google, and AT&T.

Recommendation: CAF and national federations can partner with regional OTT startups to bundle media and brand sponsorship packages for women's matches..

4. Brand-Backed Social Impact Collaborations - Brands fund sports programs in exchange for cause-related marketing assets such as documentaries, community tournaments, and branded content.

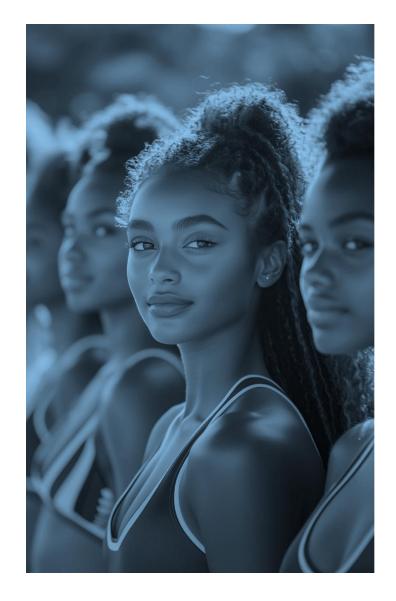
Example: Nike's Made to Play program that supports grassroots sports for girls globally.

Use Case in Africa: Proposes collaborations with telcos, FMCGs, and fintechs to reach youth audiences through sport. Each of these sectors has broad networks and coverage that extend beyond national borders.

5. Impact Investment & Gender Lens Funds: Utilize ESG (Environmental, Social, and Governance) or gender-lens investment funds to support women's sports academies, leagues, or tech platforms.

Examples include the Equality Fund (Canada) and the UN Women's "Sports for Generation Equality" Platform

Proposed Use: Provide seed funding for women-led sports businesses and female athlete entrepreneurship in Africa.





Strategic Recommendations

- 1. Establish a Women's Sports Investment Fund: to be hosted under the African Development Bank or an umbrella sports federation, aimed at attracting venture capital and donor matching.
- 2. Create a Pan-African Women in Sports Sponsorship Index: benchmark brands investing in women's sports and reward top performers annually.
- 3. Institutionalize Equity Quotas: require that at least 30% of national sports sponsorship budgets be allocated to women's sports.
- 4. Leverage Star Power: position rising female athletes as brand ambassadors for sponsors through "Africa's Next Icons" campaigns.

SECTION 4:

CROSS-CUTTING THEMES AND FUTURE OUTLOOK





SECTION 4: CROSS-CUTTING THEMES AND FUTURE OUTLOOK

THE INTERSECTION OF THE THREE PILLARS

How Sports Tourism, Tech, and Gender Inclusion can Drive Mutual Growth?

Element	Enables Growth In	Resulting Synergy
Sports Tourism	- helping boost demand for events and venues across various sports verticals.	Economic spillover into women's leagues and youth sports.
Sports Tech	- enhances visibility and efficiency within the sports ecosystem.	Greater media exposure for women and more data to attract sponsors.
Gender Inclusion	- unlocks new fan bases and talent pipelines.	Attracts impact investors, brands, and development partners.





Strength in Numbers : In Closing

NEW AFRICAN STORY

- Sports is emergins as a powerful economic driver
- Growth driven by tourism, technology and gender inclusion
- Reflect Africa's creativity, youth and global ambition

SPORTS TECH – DIGITAL ACCELERATION GAME

- Start-ups revolutionizing athlete performance and fan engagement
- Mobile and streaming platforms expanding Africa sports' global reach

SPORTS TOURISM – THE GAME BEYOND THE GAME

 Generate an estimated USD 12-15 Billion annually across the continent

WOMEN IN SPORTS - INCLUSION AS POWER

 Federations and public leadership investing in women's leagues, coaching, capacity building, business & leadership pathways



The Final Take-Away

"Africa's sporting future is being defined not by isolated stars—but by COLLECTIVE MOMENTUM."

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