Sportel 2026: seven takeaways on where the value is moving in sports media

Sportel 2026 confirmed that AI has become the sports media industry's default topic, but not yet its default way of working. We spent a couple of days at Monaco's Grimaldi Forum, alongside nearly 2,000 people from 780 companies and 73 countries, and as always many of the best conversations happened over lunches, drinks and dinners with industry friends. We came away with a clearer view of where AI is landing in sport and where the money is moving.

Two shifts stood out: AI is moving into real workflows faster than organisations can measure what it delivers, and the economics of sport keep concentrating at the top, with more of the revenue shifting to the platforms, services and data that sit around live rights. Here are our takeaways, and what we make of them.

1. AI is moving past pilots, but the value is not yet being measured

Before the conference, Sportel's organisers said the industry had moved beyond testing AI, but on stage most organisations were still describing activity rather than results. The Bundesliga, one of the more advanced leagues, sees AI today as a way to do things it could not do before rather than a way to cut costs. Part of the gap comes down to governance, where approaches varied widely, from SURJ Sports Investment's controlled, single-tool model built around confidentiality to the experiment-first approach set out by JioStar's Prashant Khanna, where each use case is tested on whether it removes a step in the workflow or multiplies the output. Both can work, as long as the guardrails follow the use case and the sensitivity of the data. The business case also needs to be set before the rollout, with clear transformation management in place to track financial impact and the pace of adoption.

2. The first AI wins are operational, and we would like the next ones to be commercial

The clearest use cases at Sportel were operational ones. Dominik Scholler of Bundesliga Media said the league, which currently produces in German and English only, is using AI to localise its content, starting with graphics and subtitles before moving to audio. LALIGA president Javier Tebas framed AI around better decisions on matches, training and injuries. Khanna described rights as "the raw material" for AI, and we would take that a step further: AI should also open up new revenue for rights holders, whether through archives licensed for AI training, rights packages for AI search and assistant platforms, or data products sold alongside the video. Publishers such as The New York Times and Reach have learned the cost of letting AI companies like OpenAI use their content without paying for it, and are now pursuing both licensing deals and legal action. Rights holders should treat AI use as a licensable right in their next cycle of deals.

3. Production models are being chosen match by match, balancing cost against quality

Producers face the same pressure to deliver more content for the same budget, and in markets like Germany many camera operators are nearing retirement with few young people coming through to replace them. Yet no single production model has won out: the Canadian Premier League runs from Protocol Sports Marketing's central hub in Toronto, TNA Wrestling stays fully on site, and the Bundesliga mixes the two, keeping its biggest fixtures on site. AI and automation, from bonded mobile transmission to automated cameras, are making remote options more viable and helping to ease the talent gap, but no one on the panel would trade quality for a lower cost. A central hub also swaps travel costs for upfront investment that only pays back with enough volume, so we see the right model as the one matched to each competition's production value and calendar, rather than the one promising the biggest saving.

4. The media rights market is splitting in two

SportBusiness puts global sports media rights at a record $65.8 billion in 2026, with the NFL and NBA alone accounting for around 30%, and expects a dip to $62.2 billion in 2027 once the World Cup and Winter Olympics drop out of the calendar. Behind the headline, the market is splitting in two: Hillary Mandel of IMG sees premium renewals rising, but only for a very small group of properties, while partners still want mid-tier rights without paying the price rights holders expect. For those mid-tier properties, the argument is shifting from the size of the fee to the ability to prove an audience with data, and we expect the ones that can show partners who their fans are and how they engage to come out ahead.

5. Capital keeps flowing into properties, but a lot of the upside sits in sports services and technology

Investment in clubs and leagues shows no sign of slowing, with US franchise valuations still climbing. Jeff Roth of Bruin Capital set out the alternative clearly: club stakes offer steady, high single-digit to low double-digit returns, while businesses that serve the sports industry can target 20% or more by growing internationally and through acquisitions. Investors are also becoming more analytical, with SURJ assessing which parts of a target's value chain AI could replace or strengthen, and IMG advising more private equity firms on media-rights forecasting. We expect AI impact to become a standard part of diligence, and sports services businesses that can show AI-driven margin and growth to stand out.

6. Rights holders are working with YouTube and the streamers, not against them

Fans, and younger fans in particular, increasingly stay on their platform of choice rather than follow a property across services, so rights holders are putting their content where the audience already is. The relationship works both ways. For the big streamers, live sport is a small share of viewing hours but, as Roth noted, drives more than half of their biggest sign-up days, while YouTube used its three dedicated sessions at Sportel to position itself as a partner to rights holders, with its EMEA vice president Pedro Pina calling on everyone in a fast-changing ecosystem to open up the dialogue. The opportunity on YouTube also goes well beyond live: BuzzMyVideos, led by Paola Marinone, estimates that around half of the sports content watched there is archive footage, which most rights holders still under-manage. We see the upside in that less visible work of archive packaging, metadata and testing at scale.

7. DTC is growing alongside broadcast deals, not replacing them

Most properties still want a strong broadcast deal in their home market, as Deltatre's Peter Bellamy pointed out, and DTC is growing around that rather than instead of it. Mid-sized properties increasingly keep one or two key markets with broadcasters and go direct elsewhere, while large clubs use DTC for specific moments such as pre-season games. The two models also feed each other, as NFL Game Pass International showed when its growth helped the league secure bigger rights deals. Ligue 1+ remains the exception, launched fully direct in France after its domestic broadcast deal ended early. The technology and data behind DTC are evolving to support this mixed model, with players like ViewLift, now part of DAZN, front and centre. The lesson for rights holders is to build that capability before a rights shock forces them to.

A final point: the product stays human

Across very different discussions, from Tebas, who does not expect anyone to sit down and watch a robot Olympics, to BuzzMyVideos' warning that audiences detach from fully AI-made content, the consensus was that audiences come for human competition and human stories. AI will make much of what happens around the match faster, cheaper and better informed, and the organisations that use it to support the human product and their audiences will take the lead.

Pimliko is an AI adoption consultancy for media, sports and entertainment. If you are working through where AI fits in your production, rights or fan strategy, we would be glad to compare notes.

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