

cimm

Coalition for Innovative
Media Measurement



Keeping the Score: Industry Perspectives on Innovations in Sports Media Measurement

July 2026



Foreword

Sports is one of the most economically consequential categories of video content in the contemporary media marketplace. Its capacity to deliver large concurrent audiences, high levels of viewer attention, and durable fan engagement distinguishes it structurally from most other forms of programming.

Yet the environment in which sports are consumed has changed dramatically. Audiences now watch sports across a complex mix of broadcast television, cable networks, streaming platforms, connected devices, and digital environments. Fans engage with sports not only through live broadcasts, but also through highlights, social media, betting platforms, and second-screen experiences. At the same time, advertising formats within sports have expanded beyond traditional commercial breaks to include sponsorship integrations, virtual signage, branded content, addressable advertising, and interactive commerce-enabled ad formats.

These developments are creating both opportunities and challenges for measurement. Traditional audience metrics remain essential, but they are increasingly complemented by new approaches that seek to capture deeper dimensions of sports media consumption: attention, engagement, sponsorship visibility, and ultimately business outcomes. As the marketplace evolves, advertisers, media companies, leagues, and technology providers are working to develop measurement frameworks capable of supporting transparent pricing, credible audience comparability, and effective advertising investment decisions.

Two CIMM Sports Measurement Innovation Showcases (the first, held virtually in Q2 2025, and the second, an in-person gathering at Google headquarters in New York in Q4 2025), were convened to explore these emerging approaches.

Bringing together executives from across the sports, media, advertising, and measurement industries, these Showcases highlighted a wide range of innovations — from attention and engagement measurement to sponsorship analytics, identity-enabled measurement, outcome-based attribution and new advertising formats designed to enhance rather than interrupt the fan experience.

This report synthesizes insights from those discussions alongside broader industry analysis. It aims to provide a clear overview of the current state of sports media measurement, the challenges facing the industry, and the innovations that are shaping its future.

As sports distribution continues to evolve and advertising models become increasingly data-driven, the ability to measure sports audiences and outcomes accurately will become even more critical. By fostering dialogue across the industry and highlighting emerging best practices, CIMM seeks to contribute to the development of measurement approaches that support a transparent, competitive, and innovative sports media marketplace.

Jon Watts
Managing Director
Coalition for Innovative Media Measurement (CIMM)

About CIMM

The Coalition for Innovative Media Measurement (CIMM) is a non-partisan, pan-industry coalition focused on improving media measurement, currency frameworks, data collaboration, and new metrics for evaluating media value across the advertising ecosystem. CIMM brings together stakeholders from broadcasters, streaming platforms, agencies, advertisers, and measurement providers to identify practical improvements in how audiences and advertising effectiveness are measured.

Research Approach and Acknowledgements

This paper represents an analytical consolidation and original synthesis of discussions and presentations delivered at two CIMM Sports Measurement Innovation Showcases, held in Q2 and Q4 2025, supplemented by interviews with industry stakeholders and analyses of publicly available measurement research. The objective of the study is to document emerging measurement challenges and innovations associated with sports media rather than to evaluate individual vendor products.

CIMM would like to thank the following executives and industry leaders for their participation in the Showcases:

Adam Paul — Executive Director, Media Alliances, LiveRamp.

Alex Kerr — CEO, Trajectory.

Alyson Sprague — VP Measurement Science, Samba TV.

Amelia Waddington — Chief Product and Technology Officer, Captify.

Andrew Lafiosca — Managing Director, Sports (U.S. and Canada), Nielsen Sports.

Barry Gilbert — Director, Sports Insights & Data Strategy, Warner Bros. Discovery.

Brian Jankovsky — Director, Entertainment and Streaming Partnerships, Google.

Brian West — Senior Vice President, Data & Measurement Strategy, NBCU Media Group Decision Sciences, NBCUniversal.

Dan Calpin — President of Hive Enterprise AI, (former).

Dan Donnelly — Head of Sports Strategy, VideoAmp.

Dan Rosenfeld — Senior Vice President, Data Analytics and Insights, DIRECTV Advertising.

Dave Coletti — VP Sports Insight and Strategy, iSpot.tv (former).

Dylan Boehm Diesko — Director, Customer Strategy & Solutions, Trajectory.

Erick Estrada — Vice President, Product Development, Sports, Publicis Sport & Entertainment, Publicis Media.

Flora Kelly — Senior Vice President, ESPN Research, ESPN.

Gerry Briand — Client Lead, VideoAmp.

Greg Dale — Chief Operating Officer, Comscore.

Jake Gore — Director, Partnership Solutions, Washington Commanders.

Jay Prasad — Chief Executive Officer, Relo Metrics.

Jen Tomashek — Senior Manager, Business Strategy, Minnesota Vikings.

Jennifer Hess — Vice President, Global Ad Operations, Fubo.

Joao Pina — Marketing Manager, Mediaprobe.

Joe Nilsson — Chief Executive Officer and Co-Founder, C15 Studio.

Joey Marcus — Director, Media Partnerships, iSpot.tv.

Justin Rosen — Senior Vice President, Data & Analytics, Ampersand.

Kimberly Manning — VP Marketing, Kochava.

Kym Frank — Senior Vice President, Research and Data, Ad Sales, FOX.

Laura Grover — Senior Vice President of Client Solutions, EDO.

Lily Tong — Director, Measurement, Amazon Ads.

Martin Blich — Executive Director, U.S. Head of Sports Partnerships & Investment, WPP Media.

Matt McLeggon — Senior Vice President, Advanced Solutions, Magnite.

Matthew Gottlieb — Senior Vice President, Insights & Measurement, NBCUniversal.

Michelle Auguste — Vice President, Media Insights, NBA.

Mike Mulvihill — President, Insights and Analytics, FOX Sports (and FOX Entertainment and Tubi).

Parker Andrews — Business Operations Senior Analyst, Carolina Panthers.

Pedro R. Almeida, PhD — Chief Executive Officer and Co-Founder, Mediaprobe.

Ross Ramunno — Vice President, Cross-Platform Research and Analytics, CBS.

Shane Peros — Managing Director, Global Partnerships, Broadcast, Media & Entertainment, Google.

Soo Jin Oh — Chief Commercial Officer, FreeWheel.

Trevor Hamilton — Managing Director, Publisher & Platform Solutions + Measurable Extension, Kochava.

Yan Liu — Chief Executive Officer and Co-Founder, TVision.

Although this paper draws upon the unique insights shared by the participating executives, the interpretations, conclusions, and recommendations contained herein are those of CIMM. The views expressed in this paper do not necessarily reflect the official positions, policies, or opinions of any individual contributor, participating executive, or their respective companies or organizations. Participation in the Showcases does not imply endorsement of the analyses or conclusions presented in this report.

© 2026 ARF Innovation Studio, Inc. All rights reserved.

CONTENTS

Executive Summary	6
Chapter 1. The Economics and Structure of the Sports Media Marketplace	8
Chapter 2. Structural Challenges in Measuring Sports Audiences	23
Chapter 3. Innovation in Audience Measurement and Attribution	33
Chapter 4. Measurement Governance and the Future of Sports Media Markets	43
Conclusion	50
About the Contributors and Participants	51
References	54

Executive Summary

Sports media has become one of the most strategically important sectors in today's TV and video economy. In an increasingly fragmented media environment, live sports remain among the few forms of content capable of consistently aggregating large simultaneous audiences, sustaining high levels of viewer attention, and generating durable advertiser demand.

Increasingly, the strategic importance of sports measurement extends beyond advertising accountability alone. Measurement systems now influence rights valuations, platform competition, investor confidence, and the allocation of capital across the broader video economy. As sports rights migrate across broadcast, streaming, social, and digital platforms, measurement systems are evolving from transactional reporting tools into a form of market infrastructure that shapes advertising pricing, rights valuation, platform competition, investor confidence, and the allocation of capital across the broader media ecosystem.

This transformation is occurring at a moment of profound structural change. Audience behavior is fragmenting across devices and platforms; advertising models are becoming increasingly data-driven; and platforms are gaining unprecedented control over first-party viewing, commerce, and identity data. Traditional television ratings frameworks, originally designed for relatively stable linear viewing environments, are under growing pressure to adapt to these new conditions.

As sports rights have become more widely distributed across multiple platforms, stakeholders across the media ecosystem are seeking more comprehensive and comparable measurement solutions capable of capturing cross-platform reach, viewer engagement, sponsorship exposure, and downstream business outcomes.

This report synthesizes insights from two CIMM Sports Measurement Innovation Showcases — the first, held virtually in Q2 2025, and the second, an in-person gathering held in Q4 2025 — alongside broader industry analysis to provide an overview of key structural challenges and emerging innovations in sports media measurement. Across the industry, stakeholders identify nine interrelated measurement challenges. These include aggregating audiences across fragmented distribution environments; unauthorized streaming via unlicensed streaming sites, social platforms, messaging applications and the like; capturing second-screen engagement and social amplification; measuring out-of-home viewing and co-viewing behavior; valuing sponsorship integrations and new advertising formats; linking advertising exposure to measurable business outcomes; risk of undercounting audiences for sports shown on local and regional channels; the requirement for next-day visibility into sports viewership for many stakeholders; and ensuring representative measurement of multicultural audiences and local market viewing.

At the same time, a wide range of measurement innovations are beginning to address these challenges. Hybrid panel-plus-big-data measurement architectures are being developed to integrate traditional audience panels with large-scale device datasets and platform-reported viewing figures. Advances in identity-enabled deduplication are improving the industry's ability to estimate unified cross-platform reach and frequency. New approaches to sponsorship analytics, attention measurement, and outcome attribution are expanding the range of signals used to evaluate the value of sports media investments. Artificial intelligence and predictive modelling techniques are also being explored to address gaps in direct observation and to support more responsive campaign evaluation.

Despite this progress, many emerging measurement approaches remain methodologically immature, difficult to compare across vendors, or highly dependent on proprietary modelling assumptions. Metrics related to attention, attribution, emotional engagement, and sponsorship exposure often rely on differing technical definitions and validation standards. As a result, the proliferation of new measurement signals may simultaneously increase analytical sophistication while also introducing new forms of opacity, fragmentation, and uncertainty into the marketplace.

Importantly, innovations in advertising formats are also advancing measurement capabilities. Streaming-native ad experiences including interactive video ads, customized creatives, and remarketing capabilities are generating new, measurable engagement signals that go beyond traditional reach metrics. These formats enable advertisers to track and understand customer actions, creating a richer picture of how sports audiences interact with brands before, during, and after the live event.

These innovations are unfolding within a broader context of evolving governance and market structure. The increasing reliance on first-party platform data, privacy-preserving data collaboration environments, and modelled measurement outputs raises important questions about transparency, comparability, and measurement independence. As the industry shifts toward first-party platform data, the primary challenge is ensuring that greater depth within individual platforms does not come at the expense of cross-platform comparability and competitive neutrality. Without robust validation standards, the proliferation of proprietary datasets risks increasing fragmentation rather than reducing it.

Looking ahead, sports media measurement is likely to continue functioning as a testing ground for broader transformations in television measurement. Possible future trajectories include convergence toward interoperable cross-platform currencies, increased reliance on platform-centric measurement frameworks, or the emergence of pluralistic trading environments in which multiple currencies coexist. Regardless of the specific path taken, the evolution of sports measurement will have implications not only for advertising efficiency but also for the pricing of media rights, the valuation of sports franchises, and the overall stability of the television advertising marketplace.

By documenting emerging challenges and highlighting areas of innovation, this report aims to support informed industry dialogue and contribute to the development of measurement approaches that enable transparent pricing, credible comparability, and sustained investment in sports media. As the economic importance of sports continues to grow, the ability to measure audiences and outcomes accurately will remain a critical foundation for a competitive and innovative media marketplace.

Sports measurement is no longer merely a technical system for estimating audiences. It is increasingly a form of economic infrastructure that shapes how media rights are priced, how advertising inventory is traded, how platform power is exercised, and how capital is allocated across the broader video marketplace. As viewing shifts toward fragmented, data-intensive distribution environments, the strategic importance of transparent, comparable, and independently validated measurement systems is likely to increase rather than diminish. In this sense, the evolution of sports measurement increasingly reflects the broader restructuring of the television and streaming economy itself.

Chapter 1. The Economics and Structure of the Sports Media Marketplace

Sports occupies a uniquely strategic position within the modern media economy. As entertainment viewing fragments across on-demand streaming and algorithmically personalized environments, live sports remain one of the few forms of programming capable of reliably generating simultaneous mass audiences at national and global scale.

This scarcity has transformed sports rights from valuable programming assets into critical components of platform strategy, advertising infrastructure, and long-term enterprise valuation. Broadcasters, streaming platforms, advertisers, and investors increasingly view sports not simply as content, but as a mechanism for subscriber acquisition, churn mitigation, audience aggregation, brand differentiation, and pricing power.

As a result, audience measurement has become substantially more consequential. Measurement systems now influence not only advertising transactions, but also rights negotiations, franchise valuations, investor assumptions, and competitive positioning across the broader video marketplace.



Live sports are the Most Valuable Player [MVP] of audience-gathering.

— Greg Dale, COO, Comscore

Measurement as Market Infrastructure

Historically, audience measurement functioned primarily as a transactional mechanism supporting advertising sales. In contemporary sports markets, however, measurement increasingly performs a broader economic role. Audience metrics now influence not only advertising pricing, but also media rights negotiations, platform valuation, subscriber acquisition strategies, franchise investment decisions, and investor perceptions regarding the long-term stability of sports media revenues.

As sports distribution fragments across broadcast, streaming, social, and digital environments, the institutions capable of defining, validating, and interpreting audience behavior acquire growing strategic importance. In this sense, measurement systems increasingly resemble forms of market infrastructure: they help determine how value is calculated, how competition is mediated, and how capital is allocated across the premium video economy.

The evolution of sports measurement therefore reflects a broader structural transition occurring throughout television markets. As media distribution becomes more platform-centric and data-intensive, control over measurement methodologies, audience visibility, and attribution systems may increasingly influence competitive advantage itself.

The unique ability of sports to convene large simultaneous audiences remains one of its defining characteristics in an otherwise highly fragmented media environment. While most forms of television programming have seen declining average audiences over the past decade, sports programming has proven unusually resilient. Major sporting events remain among the few types of programming capable of generating tens of millions of concurrent viewers, creating shared cultural moments that attract large-scale advertising investment.

Recent event-level evidence underlines the continuing scale of this phenomenon: Nielsen reports that Super Bowl LX attracted more than 125 million viewers, reinforcing the continuing ability of marquee sports properties to command exceptional levels of audience attention.

Chapter 1. The Economics and Structure of the Sports Media Marketplace

However, the distribution landscape for sports has expanded significantly. Sports programming is now delivered across a growing mix of broadcast networks, cable channels, streaming platforms, connected television applications, and digital video environments. Streaming platforms are rapidly expanding their role in sports distribution as rights holders seek new revenue streams and as technology companies pursue premium content capable of attracting large audiences. Already, 7 out of 10 sports viewers say that they use streaming to watch sports.

These structural characteristics mean that sports media markets operate under different pricing and valuation dynamics than most other video content sectors. Put simply, measurement credibility plays a disproportionately important role in shaping investment decisions.

The strategic importance of live sports to streaming services should not, however, be assumed to translate automatically into consumer subscription loyalty. Research in the U.S. market suggests a meaningful disconnect between industry expectations and consumer behavior: while streaming executives tend to view sports as central to subscriber acquisition and retention, many consumers do not identify sports as the primary determinant of whether they will subscribe to or remain with a service. This suggests that live sports may function less as a universal retention mechanism than as a high-value but uneven driver of platform differentiation.

Streaming sports audiences continue to grow rapidly, although the transition remains uneven across leagues and markets. While streaming platforms are expanding their role in sports distribution, traditional linear television continues to account for a substantial share of viewing for major live events such as NFL games and the Olympics. As a result, sports rights increasingly operate within hybrid distribution ecosystems combining broadcast and streaming delivery.



The amount of time Americans are spending watching sports is growing, reaching levels on linear TV we haven't seen in over a decade — and that growth is also increasingly happening across a broader mix of platforms, moments, and fan touchpoints than ever before.

— Flora Kelly, SVP ESPN Research, ESPN

Sports delivers more than just mass audiences. It also drives unusually high levels of viewer attention and engagement. Several measurement providers report that sports programming frequently generates higher attention scores than average streaming content, although attention methodologies and definitions continue to vary across vendors.

In addition, fan engagement with sports-related social media, betting, podcasting, fantasy gaming, clips consumption and more are all inspired by sports broadcasting, which in turn fuels demand to watch more live sports matches. Over 50 percent of sports fans regularly follow teams and players online¹, and twin-screening — fans watching the game on television while also interacting with other fans or betting on their tablets, phones or laptops — is commonplace. Younger viewers in particular increasingly follow players and teams through social media, podcast platforms, and other digital channels.



Advertising on sports television isn't just about reach, it's about relevance in moments that audiences choose, trust, and remember. Live sports uniquely command attention at scale, bringing together passionate, emotionally invested viewers in real time. From a research standpoint, that combination drives stronger recall, higher engagement, and a measurable lift in brand outcomes.

— Kym Frank, SVP Research and Data, Ad Sales, FOX Advertising

¹ PMG, *State of Sports Report*, from a survey of 1,200 US Sports fans, (Q4, 2024; report 2025).

Chapter 1. The Economics and Structure of the Sports Media Marketplace



Sports content remains one of the most powerful assets in media because it delivers what few other genres can: attention, immediacy, and connection at scale. It continues to thrive around live moments, fuel cross-platform engagement, and consistently delivers an environment for advertisers seeking both reach and impact.

— Greg Dale, COO, Comscore

This shift also reflects a more individualized pattern of fandom. In several growth sports, particularly basketball and women's sports, fan attachment is increasingly organized around athletes as personalities and cultural figures rather than around teams alone. This has implications for sponsorship, content distribution, and measurement, because it expands the relevant field of exposure beyond official match coverage to include athlete-led media, social amplification, and creator-style audience relationships.

Generational transition may ultimately prove as important to the future of sports measurement as technological change. Younger audiences increasingly experience sports through fragmented, socially mediated, and creator-driven environments rather than through the traditional full-game linear viewing model that historically underpinned television currencies.

For many younger fans, highlights, commentary clips, athlete-driven social content, podcasts, betting interactions, fantasy participation, and creator analysis now function as integral components of sports consumption rather than ancillary activities surrounding the live event. In some cases, these touchpoints may represent the primary mode of engagement with a sport or league.

This evolution complicates longstanding assumptions embedded in traditional audience measurement systems. Conventional ratings frameworks were designed primarily to measure scheduled program exposure inside relatively stable household television environments. They are less well suited to capturing fragmented patterns of fan engagement distributed across social platforms, mobile devices, and algorithmically surfaced content ecosystems.

As generational viewing behaviors continue to evolve, the strategic challenge for the industry may shift from measuring audiences for individual broadcasts toward measuring the broader ecosystem of sports engagement across platforms, formats, and time horizons.

The commercial value of sports media is also becoming less concentrated in the live game window alone. A growing body of industry analysis suggests that shoulder programming — including highlights, documentary series, behind-the-scenes clips, athlete-led content, and other narrative extensions — is increasingly important for fan acquisition, engagement, and retention. In this sense, the sports media marketplace is evolving from a schedule-based model anchored primarily in live broadcasts toward a broader always-on engagement model in which the live event remains central, but no longer monopolizes value creation.



Gone are the days of passive viewing. What fans are doing is checking stats on their phone, joining conversations on social, sports betting, and more; advertisers are looking for deeper insights on how these audiences are engaging.

— Lily Tong, Director of Measurement, Amazon Ads

These engagement dynamics are contributing to a structural revaluation of sports media inventory, as advertisers increasingly differentiate between nominal audience delivery and the quality of viewer attention. Because sports programming combines large audiences with high levels of engagement, it has become one of the most valuable forms of premium content in the global media marketplace. As a result, the value of licensing deals has increased dramatically.

Chapter 1. The Economics and Structure of the Sports Media Marketplace

The escalation of U.S. sports media rights highlights the increasing pressure on measurement accuracy. U.S. TV and streaming sports media rights payments have grown from \$14.6 billion in 2015 to \$29.3 billion in 2025 and are projected to exceed \$37 billion by 2030². The annual TV upfronts now feature nearly every major media company highlighting live sports as a central component of its programming strategy. This doubling of value within a decade means that even minor measurement inaccuracies can result in millions of dollars of misallocated capital.

The single largest sports rights owner in the world, by revenue, is the NFL, with media rights deals totaling approximately \$110 billion over the eleven years from 2023 through 2033³. The value of NBA licensing deals is also massive and growing. Moving away from the traditional model of granting national rights to a single broadcaster, the NBA's most recent rights agreements distribute games across ABC/ESPN, NBC/Peacock, and Amazon, with the deals running from the 2025-26 season through 2035-36 for a total value of approximately \$76 billion⁴. Amazon's expanding live sports portfolio, which now includes Thursday Night Football, the NBA, NASCAR, and a growing roster of women's sports properties including the WNBA and the National Women's Soccer League, illustrates how streaming services are becoming central participants in the sports rights landscape, not merely supplementary distributors.

Baseball is also undergoing structural change in its rights strategy. Major League Baseball has explored the possibility of consolidating local rights under a single streaming partner in the coming years. These shifts illustrate how leagues are experimenting with new distribution strategies as they seek to balance reach, revenue, and long-term audience growth.

Comparative evidence from the UK illustrates that rights inflation is not uniform across all sports markets. Ampere Analysis reports that the UK sports rights market has broadly plateaued since 2021, reflecting pressure on pay-TV budgets, stagnant advertising revenues, limited new-buyer competition, and the rising cost of competing with global subscription video services in entertainment. At the same time, co-exclusive rights arrangements have accelerated, with more than half of listed events now available through more than one broadcaster or service. This suggests that fragmentation in sports distribution is not only a U.S. phenomenon, but increasingly a structural feature of mature sports broadcasting markets.

The scale and volume of these rights deals are also driving record valuations for sports franchises and leagues. Institutional investors, including private equity firms, are increasingly investing in sports teams and leagues, viewing sports properties as long-term media assets with durable revenue streams.

Escalating rights fees can be understood partly as a response to declining audience aggregation in non-sports genres. As entertainment viewing fragments across on-demand environments, live sports have become one of the few programming categories capable of sustaining simultaneous mass audiences. This scarcity dynamic increases bargaining power for rights holders and encourages distributors to treat sports rights as strategic infrastructure rather than discretionary content expenditure.



Sports is becoming an asset class, not just an entertainment property.

— Jay Prasad, CEO, Relo Metrics

² S&P Global Market Intelligence (March 2025), as quoted in S&P blog post, *Sports rights in the US to reach \$37 billion by 2030* (April 2025)

³ New York Times, *N.F.L. Signs Media Deals Worth Over \$100 Billion* (March 2021)

⁴ ESPN, *What NBA's new TV deal means for the league, players, teams and fans* (July 2024)

The Repricing of Sports Media Assets

The rapid escalation of sports rights values has increased the strategic importance of audience measurement across the sports media marketplace. As live sports become more central to streaming competition, advertising demand, and franchise valuation, measurement systems increasingly influence not only media transactions but also broader assumptions about asset value, pricing power, and long-term revenue stability.

Investors, broadcasters, advertisers, and streaming platforms increasingly rely on audience and engagement metrics when evaluating the future value of sports rights and franchises. In fragmented cross-platform environments, the credibility and comparability of measurement systems increasingly function as forms of market infrastructure rather than merely analytical tools.

The transition toward hybrid measurement architectures — incorporating large-scale device datasets, platform-reported viewing figures, identity-enabled deduplication, and modelled estimates — introduces both opportunities and challenges for capital markets. On one hand, richer datasets can support more granular forecasting of fan behavior and advertising effectiveness. On the other hand, increased methodological complexity may make it harder for investors to assess the reliability of reported metrics, particularly when measurement standards differ across distributors or markets.

As sports media rights become larger and longer-term financial commitments, the perceived robustness of measurement systems increasingly influences financing conditions, partnership structures, and strategic investment decisions. Improvements in transparency, validation, and standardization of measurement methodologies may contribute not only to advertising market efficiency but also to broader financial stability within the sports media sector.

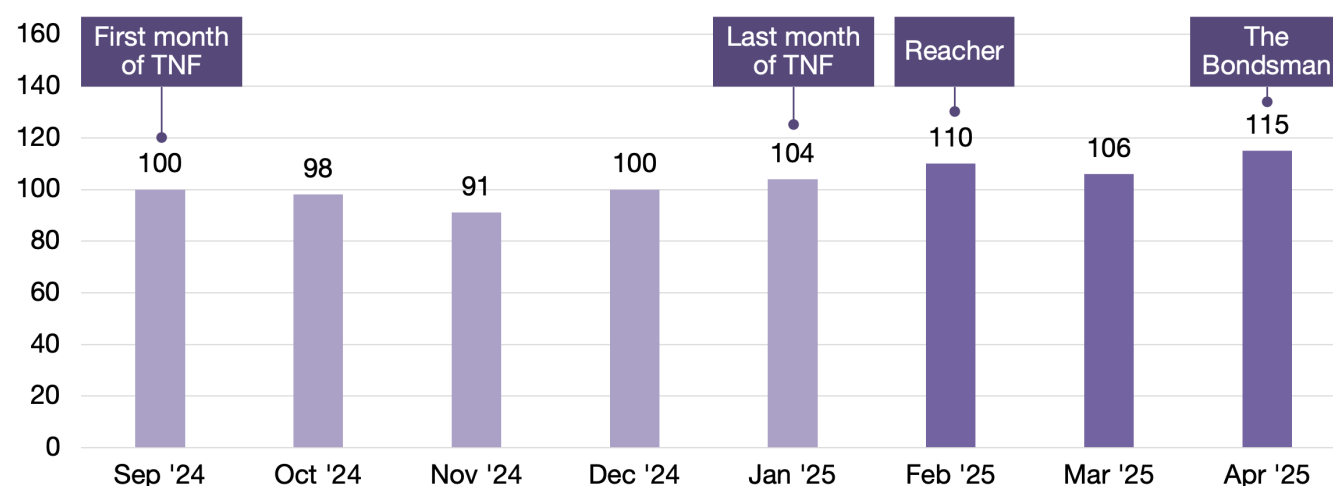
Another key feature of the sports television and streaming marketplace is the indirect value that sports programming generates for media platforms. Broadcast networks have long used sports as a platform to promote other programming through cross-promotion during live events. Streaming platforms are now adopting similar strategies, leveraging sports rights to mitigate churn and drive audiences to other programming.

Exhibit 1: Thursday Night Football (TNF) Halo Effects on Amazon

TNF viewers spend time with Amazon even after football season

Average Hours per Viewer Index

When football season ends viewers have more time to watch non-sports streaming content



Source: TVision, September/October 2025

Chapter 1. The Economics and Structure of the Sports Media Marketplace

Capital-market dynamics are not confined to leagues and rights portfolios. Investment activity is also expanding across adjacent sports technology categories, including fan engagement platforms, sports analytics, wearables, and media infrastructure. Industry estimates point to continued rapid growth in the sports technology market through 2030, with investor attention increasingly focused on technologies that can deepen fan engagement, improve monetization, and generate more actionable data. This reinforces the extent to which sports media should now be understood not only as a content business, but as part of a broader technology-enabled value chain.



The real value in sports programming comes in driving people to our streaming services.

— Ross Ramunno, VP Cross-Platform Research and Analytics, CBS



Sports are the primary acquisition driver for streaming services.

— Dave Coletti, former VP Sports Insights & Strategy, iSpot

As sports rights become distributed across more platforms, audience fragmentation increases the importance of unified cross-platform measurement and comparable reporting standards.

Fragmentation is not limited to live distribution alone. Evidence from the UK suggests that non-live and secondary coverage including highlights and online clips are increasingly important for engaging younger adults and more casual sports audiences, even if it is not yet regarded as a direct substitute for live rights. This reinforces the need to understand the sports media marketplace as a layered consumption system in which live rights remain central, but non-live content plays an increasingly important role in audience development and monetization.

Another important trend within the sports marketplace is the growing popularity of sports beyond the traditional top tier. Emerging properties — including the WNBA, NWSL, Formula 1, UFC, esports, and pickleball — have experienced significant audience growth in recent years, particularly among younger and more digitally engaged viewers. The expansion of streaming services into these categories reflects a broader industry view that underserved sports audiences represent meaningful long-term growth opportunities for both advertising and subscription platforms.

The growth of these properties may also have important implications for audience measurement. Many emerging sports audiences are younger, more female, more multicultural, and more digitally native than audiences associated with traditional broadcast-centered sports consumption. As viewing behavior becomes increasingly platform-diverse and engagement extends across social, streaming, and creator-driven environments, conventional measurement frameworks may capture these audiences less consistently.

Chapter 1. The Economics and Structure of the Sports Media Marketplace

“

For the second straight year, ads during women's sports drove greater impact than the primetime broadcast and cable average, delivering 15% more engagement than this benchmark in 2025. This is just the latest proof point that women's sports isn't 'having a moment' — it's a mainstay of the modern media plan.

— Laura Grover, SVP of Client Solutions, EDO

“

The engagement on sports is just growing, and the availability of new, interesting, more niche sports genres across the marketplace is just driving more fandom.

— Kym Frank, SVP Research & Data, FOX

Women's sports provide one of the clearest examples of how audience quality and engagement intensity may diverge from traditional scale-based valuation models. The growth of women's sports may also challenge some longstanding assumptions embedded within traditional television currency systems. Emerging sports properties frequently combine smaller aggregate audiences with disproportionately high levels of attention, engagement, and audience affinity. As advertisers increasingly seek environments associated with authenticity, emotional investment, and cultural momentum, conventional reach-based pricing frameworks may undervalue certain growth-stage sports properties relative to their commercial impact.



The Economics of Attention and Engagement in Sports Media

The growing strategic importance of sports media reflects not only the scale of sports audiences, but also the intensity and quality of viewer engagement. In increasingly fragmented media markets, advertisers are placing greater emphasis on environments capable of sustaining attention, generating emotional investment, and producing measurable consumer responsiveness. Sports programming has emerged as one of the strongest performers across these dimensions.

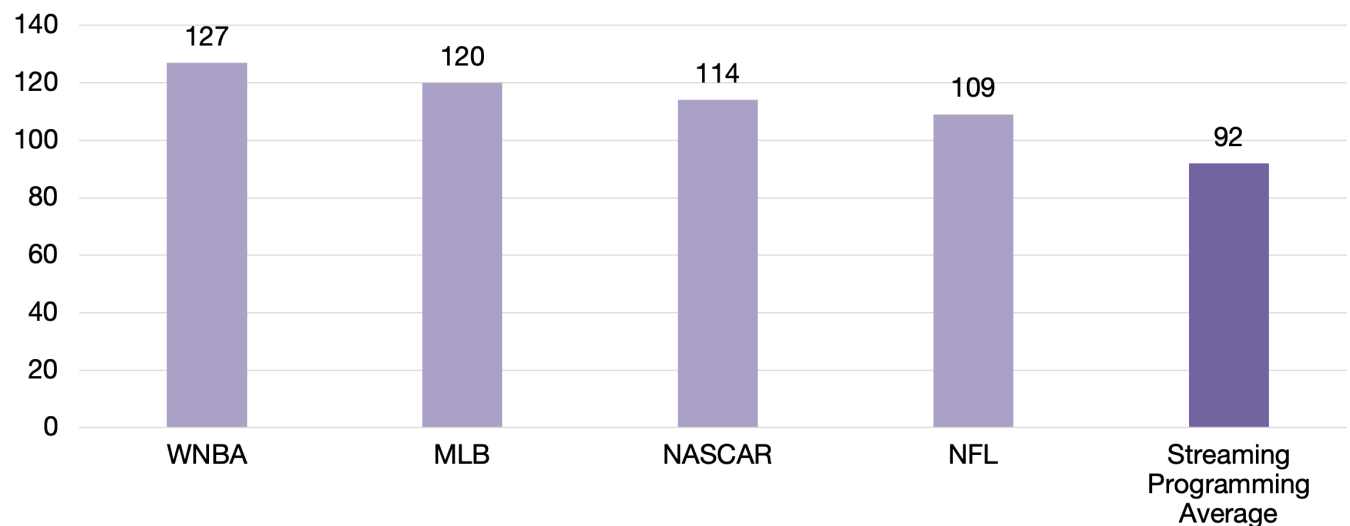
Unlike most scripted or on-demand content, live sports combines uncertainty, social relevance, and real-time participation in ways that can produce unusually high levels of audience attentiveness. Viewers are often simultaneously engaged with the event itself, social conversation, fantasy sports, betting activity, statistics, highlights, and other forms of second-screen interaction. These behaviors contribute to a broader shift in how media value is assessed: away from exposure alone and toward more granular measures of engagement quality and contextual intensity.

Research presented at the CIMM Sports Measurement Innovation Showcases suggests that sports programming frequently generates higher attention levels than average television and streaming content, although methodologies and definitions vary across providers. Several vendors reported elevated engagement across leagues including the WNBA, Major League Baseball, Formula 1, NASCAR, and the NFL, particularly during high-stakes or emotionally consequential moments within live competition.

Exhibit 2: Attention Index by Sport Type

Streaming live sports

Attention Index



Source: TVision, August 2025

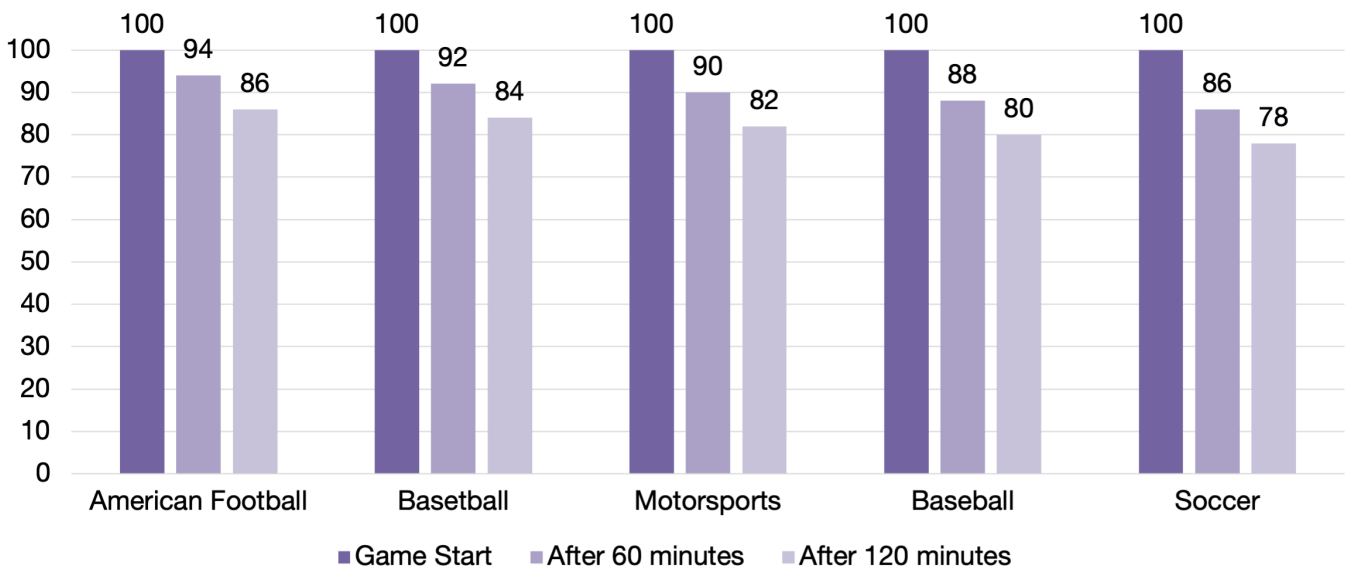
Measurement providers often report correlations between elevated viewer attention, emotional intensity, and advertising responsiveness during live sports broadcasts. However, the causal mechanisms underlying these relationships remain methodologically contested and may vary significantly across measurement approaches, data sources, and modelling assumptions.

Chapter 1. The Economics and Structure of the Sports Media Marketplace

Measurement providers including TVision, Mediaprobe, and iSpot offer analyses that indicate that viewer attention, emotional responsiveness, and audience retention can shift materially during different phases of live sporting events.

Exhibit 3: Emotional Engagement Across Sport Types by Time

As a rule, Emotional Engagement drops throughout the game



Source: Mediaprobe

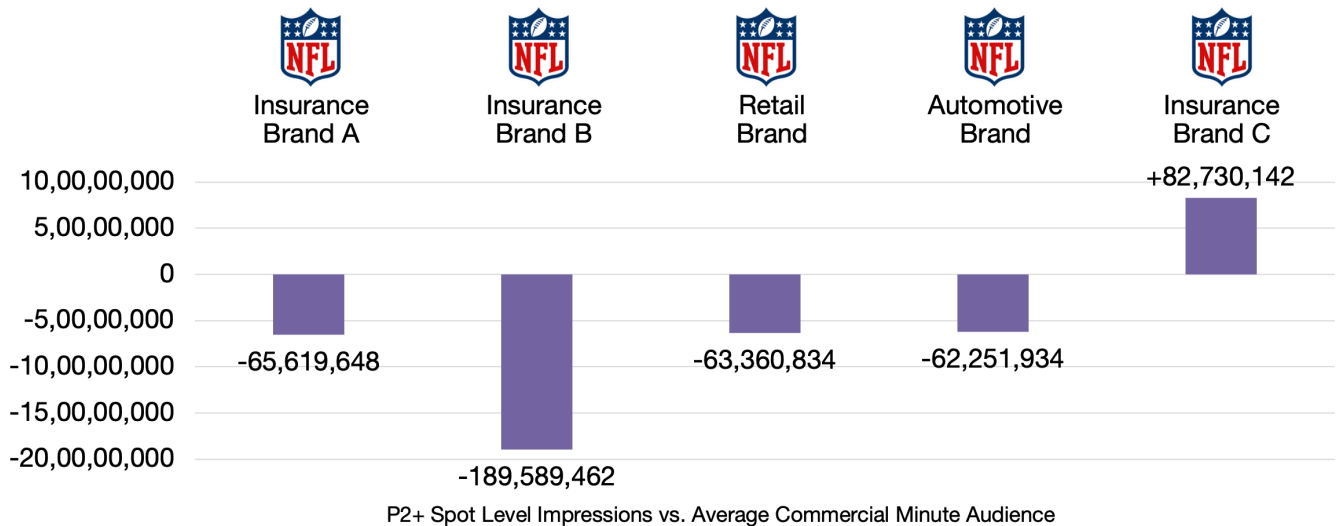
These dynamics are contributing to growing industry interest in more granular measurement approaches capable of evaluating audience behavior at the spot, possession, or second-by-second level rather than through program averages alone. The economic implications of this trend are potentially significant. Traditional television advertising currencies have historically relied heavily on Average Commercial Minute (ACM) ratings, which estimate average audience delivery across commercial breaks. However, live sports audiences fluctuate substantially throughout broadcasts depending on game competitiveness, score margin, timing, narrative tension, and other contextual factors. As a result, average audience measures may obscure important variation in actual exposure and engagement conditions. For example, in one analysis of the 2024-2025 NFL season, iSpot reported substantial differences between spot-level impressions and Average Commercial Minute delivery across major advertisers, suggesting that the timing and context of exposure may increasingly influence inventory valuation.

Chapter 1. The Economics and Structure of the Sports Media Marketplace

Exhibit 4: Gap between Spot Level Impressions and ACM

Nuances Live Beneath the Surface

4 of the top 5 most-active 2024 regular season NFL advertisers saw their Spot Level Impressions under deliver their ACM by a total of **381 million**.



Source: iSpot

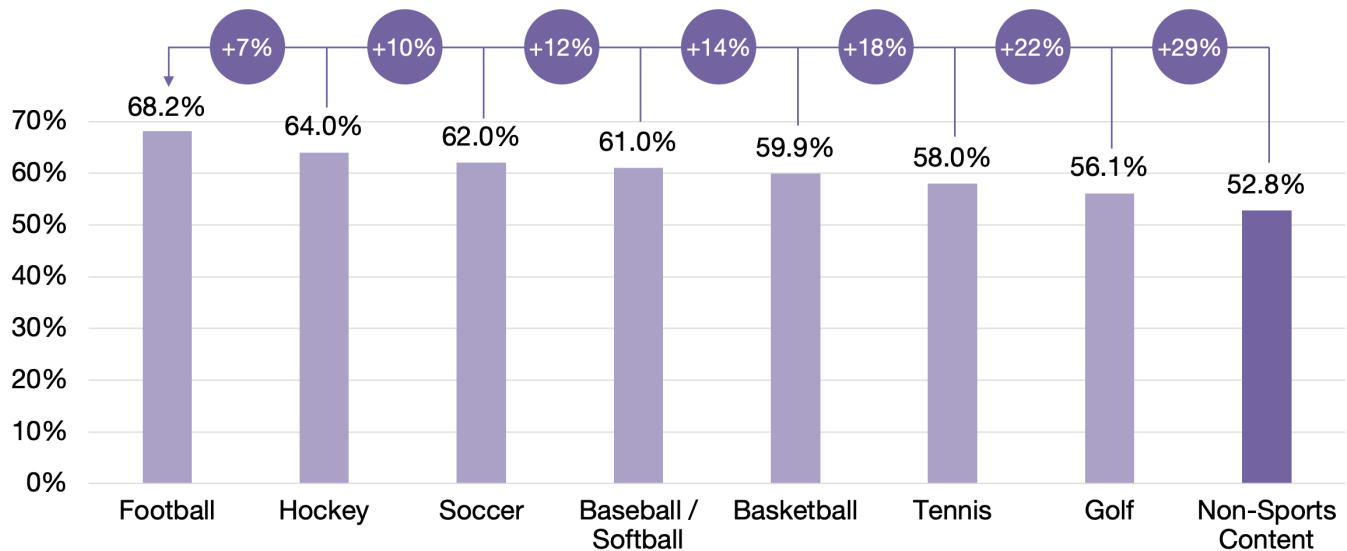
The implications extend beyond advertising delivery alone. If audience attention and engagement vary materially throughout live sports broadcasts, then not all impressions may carry equivalent economic value. Over time, this may encourage the development of more dynamic pricing frameworks that incorporate contextual signals such as audience retention, co-viewing, emotional engagement, and second-screen interaction alongside traditional reach measures.

Sports also exhibit unusually high levels of co-viewing and communal consumption relative to most other forms of video content. Football, basketball, hockey, and soccer frequently attract social viewing in households, bars, restaurants, workplaces, and other shared environments. These behaviors can amplify the effective reach and cultural salience of sports advertising, while also complicating conventional household-based audience estimation methodologies.

Exhibit 5: Co-viewing by Sport

Sports events are more likely to be co-viewed than other content

Co-Viewing % | Linear & CTV combined



Source: TVision, September 2025

At the same time, the expansion of engagement-oriented measurement introduces important methodological and governance questions. Attention metrics, biometric analysis, emotional engagement scoring, and contextual attribution models are not yet standardized across vendors, and many rely heavily on proprietary methodologies or modelled inference. While such approaches may provide valuable analytical insight, they remain at varying stages of validation and are not yet fully interoperable within syndicated currency frameworks.

Nevertheless, the broader directional shift is clear. Sports media markets are gradually evolving from systems centered primarily on audience aggregation toward more complex frameworks that seek to evaluate the quality, intensity, and commercial significance of viewer engagement. In this environment, measurement increasingly functions not simply as a mechanism for counting audiences, but as a tool for differentiating the economic value of attention itself.

The Convergence of Sponsorship, Advertising and Commerce Measurement

Another defining feature of the modern sports marketplace is the convergence of multiple forms of marketing activity within sports broadcasts. Traditional television advertising, in-game sponsorship integrations, virtual signage, and digital advertising are increasingly measured together as part of a unified marketing ecosystem.

Historically, sponsorship assets — such as logos embedded within the playing environment — were difficult to measure and often evaluated using estimated media value metrics. However, advances in computer vision, AI, and attribution modeling are enabling more sophisticated approaches to sponsorship analytics.

Recent research suggests that sponsorship exposures embedded within live sports broadcasts can generate significant incremental reach and measurable commercial outcomes, particularly when combined with traditional advertising placements. These developments are contributing to the emergence of integrated measurement frameworks capable of linking advertising exposures, sponsorship placements, and consumer outcomes within a single analytical model. As sponsorship measurement becomes more granular, rights holders and advertisers are increasingly attempting to evaluate sponsorship assets alongside traditional advertising exposures, although important methodological questions remain regarding how exposure quality translates into commercial effectiveness.

Chapter 1. The Economics and Structure of the Sports Media Marketplace

The convergence extends beyond sponsorship into commerce-enabled advertising. Streaming services are offering new ad formats that blur the line between brand exposure and direct consumer action. Interactive video ads, which enable trackable actions such as remote clicks and QR code scans during live sports broadcasts represent a new category of measurable engagement that does not exist in traditional linear environments. When combined with customized creative approaches that serve tailored messages to different viewer segments within the same ad slot, and remarketing capabilities that re-engage exposed audiences across other media products, these innovations create a closed-loop measurement model that connects live sports exposure to downstream consideration and conversion. This convergence of advertising, sponsorship, and commerce measurement is expanding the range of signals available to evaluate the total value of sports media investments.



Sports media is evolving from a collection of channels into a connected value ecosystem, where live broadcast, streaming, social, sponsorship, and commerce all contribute to a single outcome. The challenge — and opportunity — for the industry is moving beyond fragmented measurement toward a unified view of how value is actually created and captured. Measurement is no longer just about counting audiences; it's about establishing the credibility needed to price, trade, and grow the entire ecosystem with confidence.

— Jay Prasad, CEO, Relo Metrics

With the global sports sponsorship market continuing to expand — projected to grow from approximately \$73.8 billion in 2022 to over \$150 billion by 2032⁵ — advertisers and rights holders are placing greater emphasis on measurement solutions capable of demonstrating the tangible business impact of sports marketing investments.

Retail Media and the Expansion of Closed-Loop Sports Measurement

An additional structural shift reshaping sports measurement is the growing convergence between sports media, commerce media, and retail data ecosystems. Increasingly, large platforms involved in sports distribution also possess substantial first-party transaction and shopping datasets. This creates the possibility of linking sports advertising exposure directly to retail outcomes within closed-loop measurement systems.

Companies operating across streaming, commerce, and advertising infrastructure are particularly well-positioned to develop these capabilities because they can observe multiple stages of the consumer journey, including exposure, browsing behavior, purchase intent signals, and completed transactions. As retail media networks continue to expand, sports programming may become an increasingly important driver of commerce-linked advertising strategies.

This convergence has important implications for measurement governance. Platforms with access to both audience exposure data and retail transaction data may gain significant informational advantages in advertising negotiations and rights valuation discussions. Over time, this could shift measurement influence away from independent syndicated currencies and toward vertically integrated platform ecosystems.

⁵ Allied Market Research, *Sports Sponsorship Market* (2023)

Sports as a Proving Ground for Cross-Platform TV Measurement

Sports programming is also becoming a critical proving ground for innovations in cross-platform measurement. Because sports content is now distributed simultaneously across broadcast networks, streaming services, and digital platforms, accurately measuring sports audiences requires integrating multiple datasets and methodologies.

Measurement providers increasingly combine panel-based audience measurement with large-scale device datasets, such as automatic content recognition (ACR) and return-path data, to construct unified views of audience behavior across platforms. These hybrid measurement approaches aim to provide a more comprehensive understanding of how audiences consume sports content across the modern media ecosystem.

Fragmentation also introduces growing forms of consumer friction that may themselves affect audience behavior and measurement reliability. As sports rights become distributed across multiple subscription services, applications, authentication systems, and device environments, fans increasingly face complex navigation challenges when attempting to locate live events.

These frictions can influence tune-in behavior, session duration, and platform switching in ways that complicate audience comparability across distributors. They may also contribute to rising churn dynamics among streaming subscribers whose sports viewing is concentrated around particular leagues or seasons.

From a measurement perspective, increasingly fragmented access pathways raise important questions regarding how interrupted or partial viewing sessions should be valued relative to more continuous viewing experiences historically associated with linear television distribution.

Sports also presents particularly demanding measurement requirements because of the high commercial stakes associated with sports rights and advertising investments. As a result, many measurement innovations — including attention metrics, cross-platform deduplication techniques, outcome-based attribution models and new ad-format-specific engagement metrics — are first tested and refined within the sports marketplace before being applied more broadly across other forms of television and video content.

For this reason, sports media measurement increasingly serves as a laboratory for broader innovations in television measurement. Advances developed in the context of sports — such as cross-platform identity resolution, attention measurement, commerce — linked attribution, and integrated sponsorship analytics — are likely to shape the future of measurement across the entire video advertising ecosystem.

Pricing Dynamics in the Sports Media Marketplace

The pricing of sports media inventory reflects a distinctive set of economic forces that differ in important respects from those shaping other forms of television and video content. These dynamics arise from the interaction of audience behavior, distribution fragmentation, and evolving measurement capabilities. Understanding these forces is essential for interpreting recent trends in rights valuations, advertising pricing structures, and sponsorship investment.

One of the defining characteristics of sports programming is its ability to deliver large simultaneous audiences in real time. In increasingly fragmented media markets, where on-demand viewing dominates many content categories, this capacity for temporal audience aggregation has become relatively scarce. As a result, live sports inventory commands a pricing premium relative to most non-live programming.

This scarcity dynamic affects both advertising rates and media rights negotiations. Advertisers seeking rapid reach accumulation or cultural salience often prioritize sports placements, while distributors may view sports rights as strategic assets capable of anchoring broader subscription or advertising models. Measurement systems that can credibly demonstrate concurrent reach play a central role in sustaining this pricing premium.

These attention and engagement dynamics, discussed earlier, also affect pricing. They suggest that sports inventory may increasingly be valued not only by aggregate reach, but by the timing, context, and quality of exposure.

Chapter 1. The Economics and Structure of the Sports Media Marketplace

At the same time, the increasing fragmentation of sports distribution across broadcast networks, streaming platforms, and digital environments can exert downward pressure on pricing through what may be described as a fragmentation discount. When audiences are dispersed across multiple platforms, advertisers may face greater uncertainty regarding total reach, frequency, and duplication. Inconsistent measurement methodologies across distributors can further complicate campaign evaluation.

In such contexts, the absence of unified cross-platform audience metrics may increase transaction costs and reduce confidence in reported performance. This can moderate pricing growth in certain inventory segments, particularly where measurement coverage is incomplete or comparability is limited.

Pricing dynamics in the sports media marketplace are increasingly shaped by asymmetries in data access. Platforms that control large-scale first-party viewing datasets or retail transaction information may be better positioned to demonstrate campaign outcomes or incremental reach. This informational advantage can strengthen negotiating leverage in advertising sales or rights discussions.

The strategic implications of this shift extend beyond measurement methodology alone. Vertically integrated platforms that simultaneously control content distribution, advertising infrastructure, identity systems, and commerce data may gain substantial informational advantages over both advertisers and competing distributors. Over time, this could enable certain platforms to internalize audience measurement and attribution within proprietary ecosystems that are only partially visible to independent market participants.

Such asymmetries may alter bargaining dynamics throughout the sports marketplace. Rights holders, advertisers, and agencies could become increasingly dependent on platform-controlled metrics to evaluate performance, while independent syndicated currencies play a diminished coordinating and benchmarking role. The long-term governance challenge is therefore not merely improving measurement precision, but ensuring that increasingly powerful data ecosystems remain sufficiently transparent, comparable, and independently verifiable.

Conversely, stakeholders operating with more limited data visibility may find it more difficult to substantiate performance claims, potentially affecting pricing outcomes. As measurement architectures evolve, the distribution of data ownership and the credibility of analytical methodologies are likely to remain central determinants of pricing power within the sports media marketplace. Pricing efficiency in sports media markets is increasingly dependent on the availability of credible cross-platform measurement frameworks capable of reducing uncertainty around reach, engagement, and outcomes.

Measurement Governance and Currency Credibility

As hybrid measurement systems emerge — combining panels, large-scale device datasets, first-party platform data, and modelled estimates — the question of validation becomes more significant. Historically, syndicated measurement currencies operated within relatively stable institutional frameworks. Methodologies evolved incrementally, and industry accreditation processes provided a degree of assurance regarding comparability and reliability.

In the contemporary sports marketplace, however, measurement innovation is occurring rapidly. Streaming platforms increasingly contribute first-party datasets to measurement systems. Identity frameworks are used to deduplicate audiences across screens. Attention and engagement metrics are being introduced alongside traditional reach measures. Attribution models seek to connect exposure with business outcomes.

These developments raise important governance questions. Who determines whether hybrid systems meet currency-grade standards? How should industry bodies evaluate methodologies that incorporate proprietary datasets? What level of transparency is required for advertisers and rights owners to maintain confidence in reported audiences?

Chapter 1. The Economics and Structure of the Sports Media Marketplace

Independent accreditation frameworks and collaborative industry governance mechanisms may become more important as measurement architectures grow more complex. Without credible validation structures, the proliferation of competing methodologies risks undermining comparability and trust across the marketplace.

The growing measurability of sponsorship assets has important implications for media planning and rights valuation. As sponsorship exposures become quantifiable and comparable to conventional advertising impressions, they may increasingly be incorporated into unified trading frameworks rather than treated as discretionary branding investments.

Implications for Measurement Policy

Uncertainty regarding the credibility, completeness, and comparability of audience measurement can introduce what may be described as a measurement risk premium in the valuation of sports media rights. Where investors, broadcasters, or advertisers lack confidence in the accuracy of reported reach, engagement, or outcomes metrics, they may discount projected revenue streams or demand higher returns to compensate for perceived data risk. This dynamic can influence rights negotiations, advertising pricing structures, and financing conditions, particularly in fragmented cross-platform distribution environments where measurement methodologies vary. Conversely, improvements in transparent, independently validated measurement frameworks may reduce perceived uncertainty, supporting more stable rights valuations and facilitating long-term investment in sports media assets.

Taken together, these dynamics underscore the importance of transparent, comparable, and independently validated measurement frameworks. Pricing efficiency in sports media markets depends not only on audience demand but also on the credibility of the metrics used to evaluate performance. As live sports continue to function as a critical anchor for advertising investment, improvements in cross-platform measurement may play an important role in supporting sustainable pricing structures across the industry.

More broadly, live sports may increasingly function as the economic stabilizer of the premium video ecosystem itself. As entertainment viewing fragments across on-demand and algorithmically personalized environments, relatively few forms of programming remain capable of delivering simultaneous mass audiences at national scale. Sports therefore occupies a structurally distinctive position not only within advertising markets, but within the broader economics of television distribution, subscription retention, and platform competition.

In this context, audience measurement takes on heightened strategic importance. Measurement systems no longer operate merely as transactional tools for evaluating advertising delivery; they increasingly underpin assumptions about the long-term viability of sports rights portfolios, the sustainability of streaming business models, and the future structure of premium video markets. The evolution of sports measurement is therefore closely tied to the future economic architecture of television itself.

These economic and structural dynamics help explain why sports measurement has become significantly more complex and commercially consequential. As distribution expands across fragmented platforms and fan engagement extends beyond the live telecast itself, traditional audience measurement systems face growing pressure to capture the full scale and value of sports media consumption. The next chapter examines the principal structural challenges emerging from this transition.



Chapter 2. Structural Challenges in Measuring Sports Audiences

Sports consumption is expanding rapidly across a wide range of television platforms, streaming services, and digital environments. Fans increasingly watch games on connected TVs, laptops, smartphones, and tablets, while also interacting with sports content across social media, betting platforms, podcasts, and gaming environments. These developments are broadening the reach of sports media while simultaneously creating a series of complex measurement challenges.

As the sports ecosystem has become more fragmented and interactive, traditional measurement frameworks, many of which were designed for a simpler linear television environment, have found it challenging to capture the full scale and value of sports audiences.

Across the industry, stakeholders frequently point to nine major measurement challenges that complicate efforts to comprehensively measure sports audiences and advertising performance.

Each of these challenges reflects broader structural changes occurring within the media ecosystem, but they are particularly acute in sports due to the scale, economic value, and real-time nature of live sports programming. Although the operational challenges facing sports measurement are diverse, they largely reflect three deeper structural tensions reshaping the modern media marketplace.



First, the fragmentation of distribution across broadcast, streaming, mobile, and social platforms has complicated unified audience measurement and cross-platform comparability.



Second, the expansion of measurable engagement signals — including attention, sponsorship exposure, social amplification, betting activity, and commerce interaction — has broadened the definition of sports media consumption beyond conventional ratings systems.



Third, advertisers and investors increasingly demand evidence not only of audience exposure, but also of measurable business outcomes, placing pressure on measurement systems to support attribution and commercial accountability.

We have identified nine core sports measurement challenges which flow from these broader structural transitions.

Exhibit 6: Core Sports Measurement Challenges

	Core Sports Measurement Challenges
1	Aggregating viewing in a fragmented ecosystem.
2	Unauthorized streaming and audience visibility.
3	Measuring second screen usage.
4	Capturing out-of-home and co-viewing sports media consumption.
5	Assessing the value of sports sponsorships.
6	Measuring mid and lower funnel outcomes.
7	Measuring local and regional sports viewing.
8	Next day ratings delivery.
9	Multicultural audience measurement.

These nine sports measurement challenges are examined in more depth below.

1. Aggregating Viewing in a Fragmented Ecosystem

Sports viewing provides a particularly visible test case for broader cross-platform measurement challenges affecting the television industry. Within even a single league, rights are now split across a patchwork of national broadcasters, regional sports networks, and streaming platforms — each with different data access rules and measurement visibility. This proliferation of distribution points makes it exceedingly difficult to produce unified, de-duplicated cross-platform audience and advertising metrics.

Cross-platform sports distribution introduces multiple sources of measurement distortion. Simultaneous availability across broadcast, streaming and digital environments can lead to both under-counting (where data access is restricted) and over-counting (where deduplication is incomplete). The resulting uncertainty complicates negotiation of advertising guarantees and rights valuations.



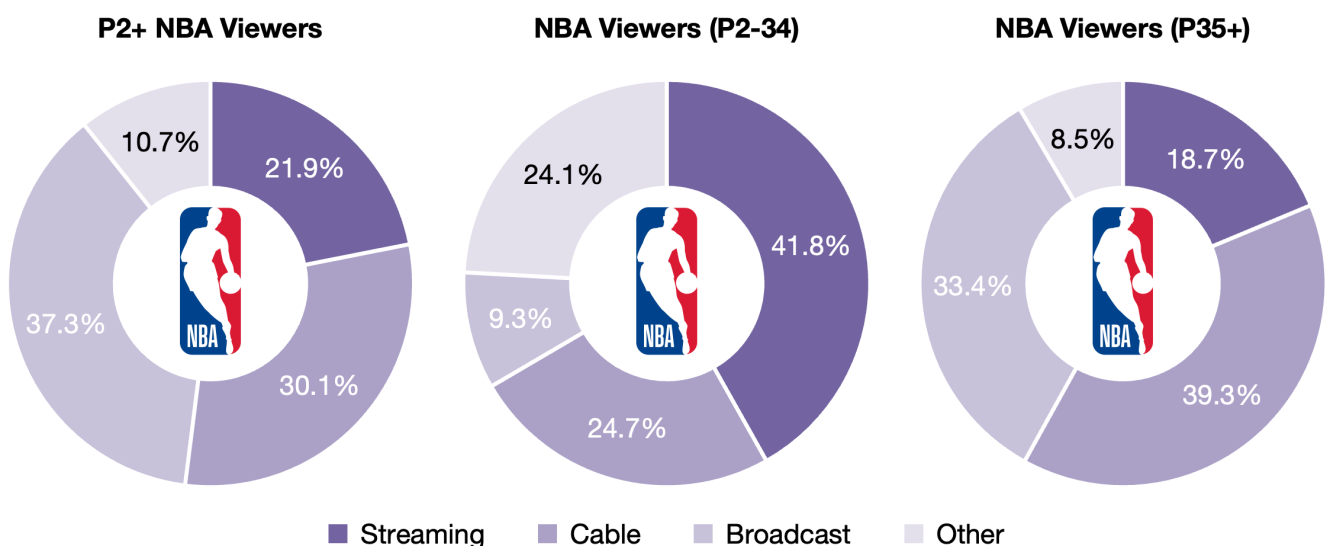
Deduplication is a real headache for our measurement team. A fan watching on ESPN, ESPN+, Hulu Live, actually could end up getting counted two or three times. We need clean, deduplicated reach and frequency across linear, streaming and local buys. We need true cross-platform measurement.

— Nicolas Grand, Executive Director, Research & Investment Analytics, WPP Media

These challenges are likely to intensify as younger, more digitally native audiences become a larger share of total sports viewership. Younger fans are far more likely to consume live sports through streaming apps or social feeds rather than traditional broadcast or cable channels. As shown in Exhibit 7, only about one-third of younger NBA viewers watch games via linear TV, compared with nearly two-thirds among older demographics.

Exhibit 7: NBA viewing consumption by age

NBA media consumption patterns



Source: Nielsen, April 2025

Chapter 2. Structural Challenges in Measuring Sports Audiences

Compounding this fragmentation is the rise of sports consumption across devices beyond the television screen. Increasingly, fans watch live games on laptops, smartphones, and tablets — contexts where measurement standards vary widely. While digital viewing is critical for extending the incremental reach of linear campaigns, the industry still lacks a fully standardized, cross-device methodology to unify these audiences within a single currency-grade framework.

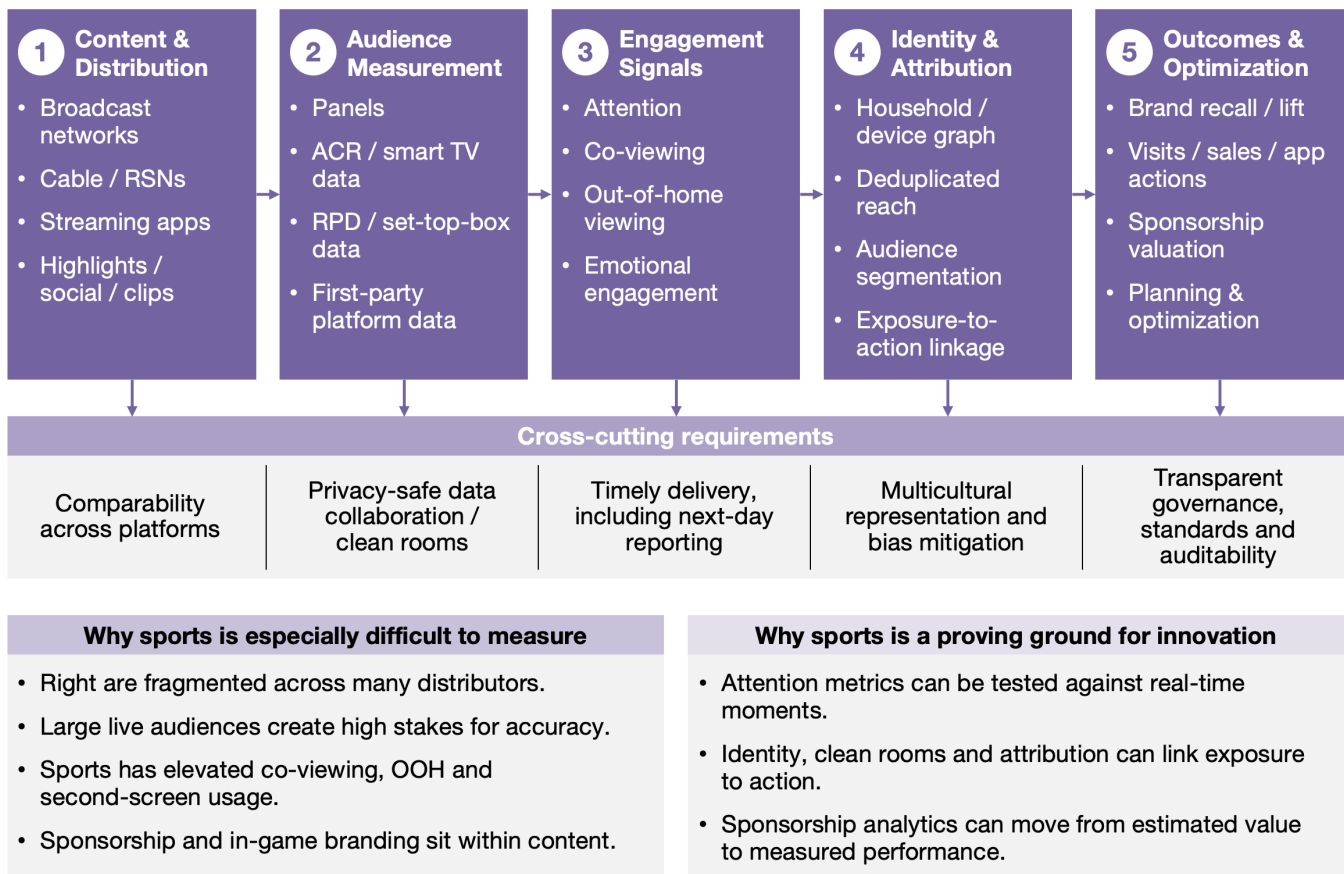
Partly as a result of these challenges, some sports leagues and broadcasters called into question the reliability of existing measurement systems. For example, the NFL has publicly questioned whether existing panel-based measurement approaches fully capture streaming audiences and out-of-home viewing associated with major sports events. These concerns reflect a broader industry debate about how best to measure sports audiences in an era of fragmented distribution and hybrid panel-plus-big-data measurement systems.

Many emerging measurement solutions rely on large-scale datasets derived from smart TV automatic content recognition (ACR) signals and cable or satellite set-top box return-path data (RPD). These datasets can provide exposure signals from tens of millions of devices, greatly increasing sample sizes relative to traditional panels. However, they also introduce new sources of bias, as they represent only households using particular device manufacturers or distribution platforms.

The complexity of the fragmented ecosystem for sports, with a disparate set of distribution paths, audience measurement methodologies, engagement signals, IDR approaches, and outcomes data, is captured in the Exhibit below.

Exhibit 8: Cross-Platform Sports Measurement Ecosystem

Illustrative framework for measuring audiences, engagement, sponsorship and business outcomes across TV and video



Source: CIMM

2. Unauthorized Streaming and Audience Visibility

Unauthorized streaming has emerged as a significant structural challenge within the sports media ecosystem. Major sporting events are now widely redistributed through unlicensed streaming sites, social platforms, messaging applications, and other informal digital channels that operate largely outside conventional audience measurement systems.

From a measurement perspective, unauthorized viewing introduces several forms of uncertainty. First, it may reduce the visibility of total audience consumption by shifting portions of viewing outside measurable environments. Second, it can complicate cross-platform audience estimation when consumers move fluidly between authorized and unauthorized streams. Third, piracy may distort assessments of the true market value of sports rights by weakening the relationship between observed monetized audiences and actual total consumption.

Unauthorized streaming also highlights the growing tension between audience accessibility and rights monetization. As sports rights become increasingly fragmented across subscription services and premium distribution tiers, some consumers may turn to unauthorized alternatives because of cost, discoverability challenges, or platform fragmentation.

Although reliable estimates of unauthorized sports viewing remain difficult to produce, the issue is becoming increasingly relevant to broader discussions regarding sports audience visibility, platform economics, and the long-term sustainability of premium rights models.

3. Measuring Second Screen Usage

Second-screen interaction with sports content goes way beyond watching live matches. Increasingly, fans (especially younger ones) consume sports related content across social media, betting apps, and podcasts — providing advertisers unique opportunities to amplify their messaging, and offering platforms and leagues new paths to developing fan relationships and cross-promotion of live game broadcasts.

Off-platform fan engagement events and viral content can generate significant incremental exposure that is rarely captured in conventional audience measurement outputs.



The playing field is going well beyond the big screen. Brands and franchises are doubling down on cultural moments and engagement for the connected fan experience, including touch points like sport creators that bring incremental audiences to a traditional media buy.

— Greg Dale, COO, Comscore



Chapter 2. Structural Challenges in Measuring Sports Audiences



It's all about looking beyond that live game viewership, and it's really important to redefine what success means when it comes to fan and consumer engagement. How do we really showcase the value of the NBA brand? Because it goes way beyond just live game viewership.

— Michelle Auguste, Vice President Global Media Insights, NBA

Second-screen engagement also includes a rapidly growing “clips economy,” in which fans consume highlights, commentary, and short-form sports content across platforms such as YouTube, TikTok, and Instagram. Some market research now suggests that second-screening is close to normative in certain sports categories. For example, one 2025 study reported that 86 percent of Formula 1 fans use a second screen during races, underscoring the extent to which sports viewing is increasingly synchronized across television, mobile, and social environments. These interactions often occur after live games conclude, extending the lifecycle of sports content but complicating efforts to measure total audience exposure.

From a measurement perspective, second-screen behavior challenges traditional assumptions about campaign exposure boundaries. If fan engagement extends temporally beyond the live telecast, the effective duration and reach of sports advertising may exceed the broadcast window. This raises questions about how integrated campaign value should be priced and attributed. Streaming services with cross-product advertising capabilities are beginning to address this challenge through remarketing approaches that identify audiences exposed to live sports creative and re-engage them across other ad products, such as streaming TV, audio, or online display, extending the measurable impact of sports advertising well beyond the live game window.

Another rapidly growing dimension of second-screen engagement is legalized sports betting. Since the repeal of the Professional and Amateur Sports Protection Act (PASPA) in 2018, sports betting has expanded across more than thirty U.S. states. Betting platforms generate large volumes of real-time behavioral data reflecting fan engagement with games. Some industry observers believe these datasets could eventually contribute to new forms of sports audience analytics, although integration with television measurement systems remains limited.

Sports betting data may also emerge as an important supplementary signal for understanding fan engagement intensity and real-time audience behavior. Betting activity reflects highly active viewer attention and emotional investment, often at sub-game temporal resolution. Although these datasets are not currently integrated into mainstream television measurement systems, they may eventually contribute to broader models of sports engagement, advertising responsiveness, and audience valuation.

In general, cross-screen sports activity is hard to aggregate and measure. Likewise, the emerging ‘clips economy’ is becoming valuable in sports for day-after consumption on YouTube, TikTok, and the like, but is difficult or impossible to bundle into in-game broadcast campaigns packages. The second screen often doesn’t get the credit it deserves for reaching and engaging incremental audiences.

4. Capturing Out of Home and Co-Viewing Sports Media Consumption

Out-of-home viewing — such as sports watched in bars, restaurants, offices, or social gatherings — is particularly significant for sports programming. Fans frequently gather in groups to watch major sporting events, creating viewing environments that differ substantially from traditional in-home television consumption.

Traditional measurement services that focus primarily on household viewing can miss a substantial share of sports audiences. Nielsen estimates that out-of-home viewing may account for 10-15 percent of total viewership for many sporting events and an even higher percentage for tentpole events like the Super Bowl and Thanksgiving NFL games.

Sports programming also demonstrates unusually high levels of co-viewing, reflecting the social nature of sports fandom. Measurement research indicates that football broadcasts may experience co-viewing rates exceeding 68 percent, with other sports such as baseball, basketball, and hockey also demonstrating elevated co-viewing levels.



We need better modeling for co-viewing and out-of-home attention, because we know passive exposure doesn't carry that in sports.

— Nicolas Grand, Executive Director, Research & Investment Analytics, WPP Media

The challenge for measurement providers is that traditional ratings frameworks often rely on household-level viewing metrics, which may undercount the number of individuals actually watching a game. More granular person-level measurement approaches are increasingly important for accurately capturing the true reach of sports broadcasts.

Co-viewing is another challenge. Sports programming exhibits especially high co-viewing rates across both linear and CTV, with football at 68.2 percent, hockey at 64 percent, soccer at 62 percent, baseball/softball at 61 percent, and basketball at 59.9 percent⁶. These levels exceed non-sports content, reflecting the fact that sports are frequently consumed in social environments, whether inside or outside the home. Counting impressions is not enough; the industry increasingly wants a fuller picture of the viewer journey.

5. Assessing the Value of Sports Sponsorships

Sponsorships and in-screen branding are prevalent in sports as non-standardized ad units, creating measurement complexity for advertisers trying to understand the value of their advertising investments. Brands spend an enormous amount of marketing dollars on sports sponsorships, ranging from in-stadium signage to logos on uniforms to sponsored half-time shows. For soccer, in particular, digital brand signage along the pitch drives more ad revenue than traditional 30 second ad spots.

As sponsorship exposure becomes quantifiable at scale, these assets may transition from brand-building instruments toward performance-optimized inventory classes. This could alter how sponsorship packages are priced, bundled, and traded. To make this transition, the industry must overcome an increasingly vital challenge of valuing these investments by better understanding their reach and impact. Moreover, industry executives complain that there are no standard industry benchmarks to price sponsorships and understand their success.

Making sponsorship valuation more difficult is the fragmentation of ownership of various sponsored ad units. It's not just brands who seek to better assess the value of sponsorships. In professional basketball, for instance, the teams themselves sell the logos on the jerseys, the league (e.g. the NBA) sells the signage on the courts, the stadiums (sometimes co-owned by the teams) sell in-stadium banners, and the broadcasters sell many 'sponsored' components of the broadcast such event-driven moments (tip-off, timeouts, highlights, MVP), broadcast segments (pregame, halftime, postgame, replays, stats), and visual inventory (scorebug, virtual signage).

A growing additional dimension of sponsorship measurement involves digitally inserted or augmented advertising, including virtual field signage and broadcast overlays. These technologies allow rights holders to display different sponsor graphics to viewers in different geographic markets. While such technologies create new revenue opportunities, they also complicate measurement because each viewer may see different sponsorship exposures during the same broadcast.

⁶ Source: TVision streaming sports engagement data (2025).

6. Measuring Mid- and Lower-Funnel Outcomes

Another major challenge in sports measurement involves linking advertising exposures to tangible business outcomes such as sales, website visits, app downloads, or store traffic.

Historically, television advertising has relied heavily on reach and frequency metrics. While these measures remain essential for campaign planning and trading, they do not directly demonstrate whether advertising exposure produced a measurable business result.

New measurement approaches are emerging that combine advertising exposure data with location analytics, retail transaction data, and identity-resolution frameworks to estimate the impact of sports advertising on consumer behavior. These approaches seek to estimate relationships between campaign exposures and downstream behaviors such as store visits, website traffic, and online purchases, providing advertisers with a clearer understanding of campaign effectiveness.

Immediate engagement signals — including search behavior and site visitation measured in real time — represent a distinct and complementary outcomes layer. Unlike attribution models, which require conversion windows and methodological assumptions, these mid-funnel metrics provide advertisers with near-instant feedback on creative effectiveness and media value. As live sports migrates to streaming, advertisers increasingly expect this same immediacy applied to TV — a real-time, actionable read on creative performance and media efficiency that lower-funnel attribution models do not immediately deliver.

While attribution models offer valuable insights, their methodological assumptions — particularly regarding causality, identity resolution, and data completeness — remain subject to ongoing debate. Industry adoption will depend on transparent validation and comparability across vendors.

A further challenge is the absence of agreed methodological benchmarks for validating attribution models across vendors. Differences in identity resolution approaches, conversion windows, and control group construction can materially affect reported outcomes.



The sports landscape is more dynamic than ever. While live sports still deliver unmatched scale and attention, the way fans engage across streaming, social, gaming, and culture has fundamentally changed. Agencies are placing greater emphasis on measurement to drive better value sponsorships and prove real business outcomes.

— Martin Blich, Executive Director, US Head of Sports Partnerships and Investment,
WPP Media

7. Measuring Local and Regional Sports Viewing

Measuring local and regional audiences can be uniquely challenging, and it is particularly vital in sports as many local communities depend increasingly on their local broadcast TV stations to deliver games from local teams (including from popular college sports) that do not have national carriage appeal. Many structural factors lead to undercounting in local TV, which are acutely felt in the sports space given the high proportion of games that are distributed via local broadcasters.

Today, linear television remains the foundation of local measurement, captured through panels, return-path data (RPD), ACR data, over-the-air (OTA) households, and heavy reliance on modeling. Coverage is not uniform: person-level viewing is directly observed in some panel-based (metered) markets, while modeled in other metered and smaller markets that rely primarily on set meter and on RPD data.

Chapter 2. Structural Challenges in Measuring Sports Audiences

For OTA households, Nielsen directly measures OTA via panels in 208 measured markets, while Comscore estimates OTA using survey inputs, neighbor tuning, and TV on/off validation. Digital simulcasts are included only when vendor-specific requirements are met, such as software development kit (SDK) deployment, source identifier (SID) tagging, and ad-load alignment. Digital streams without these elements are not credited, which leads to differences across markets.

Streaming and digital environments are inconsistently represented across local DMAs. Station apps, mobile and browser streams, FAST channels, YouTube TV (vMVPD), YouTube AVOD (e.g. the app), and social video platforms are often excluded. In many cases, this viewing is either not credited or routed into generic categories that do not provide market- or source-level attribution. This means local digital and streaming audiences remain undercounted and underrepresented in syndicated outputs.

Taken together, these challenges suggest that a meaningful share of local sports viewing may remain under-measured in current syndicated systems, particularly in fragmented digital and streaming environments. A potential indicator of the scale of undermeasurement could be potentially as much as 20-30% of total viewing, based on a detailed CIMM study of the measurement gaps in overall (not just sports) local viewing⁷.

These blind spots are concentrated in digital environments where coverage depends on tagging, feed mapping, or licensing conditions, and they tend to bias toward undercounting rather than over-reporting. Big data using RPD is also undercounted, as it does not include households that access their cable subscription through a cable operator streaming app instead of using a hardwired set-top box.

This 20-30% measurement gap represents more than a technical error; it is a threat to the local broadcasting model for sports. Persistent local measurement gaps systematically understate the economic value of local sports properties during critical rights renewals, negatively impacting carriage fees and advertising revenue.

These local measurement challenges illustrate the limits of nationally standardized currency systems in increasingly heterogeneous media markets. Future measurement frameworks may need to incorporate more flexible market-level modelling approaches while maintaining national comparability.

Persistent under-measurement of local digital audiences may distort the perceived economic viability of regional sports distribution models. Regional sports networks and local broadcast partners rely heavily on advertising and carriage revenues linked to reported audience performance. Where digital and streaming consumption is under-captured, the measured reach of local sports properties may be systematically understated.

This has the potential to influence negotiations over advertising rates, distribution fees, and long-term rights valuations. In fragmented viewing environments, incomplete measurement coverage can affect not only tactical media planning but also the perceived economic sustainability of regional sports distribution models.

The consequences of fragmented measurement are distributed unevenly across stakeholders within the sports marketplace.

Broadcasters and regional sports networks face the risk that incomplete measurement may understate audience delivery and weaken negotiating leverage during advertising sales or carriage discussions. Streaming platforms, by contrast, may benefit from greater access to first-party viewing and behavioral data, strengthening their ability to demonstrate audience engagement and commercial outcomes inside proprietary environments.

Advertisers and agencies increasingly seek unified cross-platform comparability and independent verification, but may encounter growing complexity as competing currencies, attribution systems, and attention metrics proliferate. Sports leagues and rights holders, meanwhile, depend heavily on credible aggregate audience narratives to sustain escalating rights valuations and investor confidence.

These tensions illustrate that sports measurement is no longer solely a technical challenge. It increasingly influences bargaining power, market transparency, and the distribution of economic value across the broader sports media economy.

⁷ CIMM, *Plugging the Gaps: A Diagnosis Analysis of Local TV and Video Measurement* (November 2025)

8. Next-day Ratings Delivery

Another important challenge in the sports measurement space is the demand for immediacy from broadcasters, streamers and the leagues. While most entertainment content can tolerate slower delivery of measurement data, sports require next-day visibility into viewership because of its time-sensitive nature, outsized financial stakes, and reliance on constant sponsor accountability. But this is a high bar for many measurement services.

Given the enormous expense of sports rights, leagues and broadcasters use next-day data to prove that their programming is delivering the promised reach and engagement. Sports carries a premium ad load and some of the most expensive ad slots on television. Next-day ratings allow broadcasters and leagues to report quickly to sponsors on how many viewers actually tuned in, helping advertisers assess ROI in real time and adjust future spend. Next-day ratings also let leagues and networks feed headlines (“last night’s game drew X million viewers”) into sports and business press immediately.

These narratives reinforce the impact of the sport, shape fan perception, and help drive tune-in for upcoming games. Finally, in an environment where leagues and networks compete for attention, having next-day audience metrics creates a near-real-time scoreboard. The NFL, NBA, MLB, and others, and their broadcast partners, can benchmark performance against rivals quickly, which can be critical in contract negotiations or when selling future sponsorships.



Don't mess with my next day.

— Executive at a Streaming Service

9. Multicultural Audience Measurement

Finally, ensuring representative measurement of multicultural audiences remains an important issue for the sports industry. African-American and Latino audiences, who make up an outsized share of fan bases in many major sports, have historically been undercounted by TV measurement providers.

This issue traditionally stemmed from the reliance on small, nationally representative household panels that served as the basis for TV ratings. Because African-American and Latino households are harder to recruit and retain in such panels — due to factors like higher residential mobility, language barriers in Spanish-speaking households, and lower participation rates in survey-based research — their representation in panels has often lagged behind demographic reality. Advocacy groups such as the NAACP and the National Hispanic Media Coalition publicly challenged measurement providers in the 2000s and 2010s, arguing that the under-sampling of these communities systematically distorted reported audiences, especially for programs with strong multicultural viewership bases.

Chapter 2. Structural Challenges in Measuring Sports Audiences

The transition by measurement providers from panel only to hybrid panel-plus-big-data solutions has mitigated the problems associated with recruiting fully representative household panels, but problems may remain. Many 'Big Data' datasets are based on smart TV ACR data, and only measure households that own TVs from specific manufacturers (e.g., Vizio, LG, Samsung partners). Penetration rates vary by income, age, and ethnicity. If lower-income or more mobile households — which disproportionately include African-American and Latino families — are less likely to own or regularly use those devices, they are underrepresented in the data. Moreover, ACR and set-top box data depend on household opt-ins to data collection. Privacy sensitivities or language barriers may reduce participation rates in certain communities, leading to skewed samples. Finally, state by state privacy regulations impedes the collection of sensitive data in some geographies, undermining the comprehensiveness of panel-plus-big-data solutions.

The implications are significant: undercounting minority viewers can depress the measured audience size of sports like the NBA, boxing, soccer, and others that disproportionately draw African-American and Latino fans. This not only impacts the perceived cultural reach of these sports, but also affects advertising rates, sponsorship valuations, and the willingness of brands to invest in campaigns targeting diverse audiences.

These challenges in measuring multicultural audiences highlight the continued importance of transparency in sample construction and calibration methodologies. As measurement systems incorporate larger device datasets, ensuring demographic representativeness may require new forms of cross-source validation rather than reliance on any single dataset.

Together, these challenges illustrate the extent to which legacy audience measurement frameworks are being strained by contemporary sports consumption patterns. In response, broadcasters, platforms, advertisers, leagues, and measurement providers are developing new analytical tools designed to improve cross-platform visibility, engagement measurement, sponsorship valuation, and outcome attribution. The next chapter examines these emerging innovations.



Chapter 3. Innovation in Audience Measurement and Attribution

Measurement providers, leagues, broadcasters, advertisers, and technology platforms are working to develop new approaches capable of aggregating audiences across platforms, quantifying fan engagement, and linking sports exposure to measurable business outcomes.

Rather than representing discrete product innovations, many emerging solutions can be understood as components of an evolving measurement architecture, combining exposure measurement, engagement analytics, identity-enabled deduplication and outcome attribution into integrated decision frameworks.

Taken together, these innovations suggest that sports measurement is evolving toward multi-layered analytical architectures that integrate exposure measurement, engagement signals, identity resolution, and commercial outcomes. The sports marketplace functions as a testing ground for the broader transformations changing television measurement.

These efforts are taking place against a backdrop of rapid structural change in the sports marketplace. Rights are increasingly distributed across broadcast, cable, streaming, and digital platforms. Advertising formats are proliferating, ranging from conventional commercial pods to in-game sponsorships, virtual signage, branded integrations, interactive commerce-enabled units and customized creatives. At the same time, advertisers are demanding more than gross audience delivery. They increasingly want to understand whether sports programming captures attention, strengthens brand outcomes, drives site visits or purchases, and creates durable value beyond the live telecast itself.

The industry is responding to these demands with a new generation of tools and methodologies. These innovations are not yet comprehensive, and many remain at different stages of maturity. Nevertheless, they offer an important view into the direction of travel of sports measurement.

Broadly, these developments fall into several interrelated categories: first-party data integration; second-screen and cross-screen measurement; out-of-home and co-viewing measurement; sponsorship analytics; attention and spot-level audience measurement; lower-funnel attribution; and new ad and commerce-linked metrics.

Exhibit 9: Emerging Measurement Solutions Addressing Key Sports Measurement Challenges

Measurement challenge	Sports challenges	Emerging measurement solutions	Illustrative companies / approaches
1. Aggregating viewing in a fragmented ecosystem.	Sports rights are split across broadcast, cable, RSNs, streaming platforms, and digital environments, making deduplicated audience measurement difficult.	Hybrid panel-plus-big-data systems; first-party data integration; cross-platform identity resolution; unified reach and frequency models.	Nielsen panel + big data approaches; platform first-party data; VideoAmp cross-platform measurement; identity graph approaches.
2. Measuring second-screen usage.	Sports fandom extends beyond the live game into social media, highlights, podcasts, betting, fantasy, and other digital touchpoints that are rarely captured in a single measurement framework.	Cross-screen panels; integrated fan engagement metrics; digital behavior linkage; publisher-specific total engagement dashboards.	Comscore cross-platform engagement; ESPN internal fan engagement metrics; league and publisher custom audience frameworks.

Chapter 3. Innovation in Audience Measurement and Attribution

Measurement challenge	Sports challenges	Emerging measurement solutions	Illustrative companies / approaches
3. Capturing out-of-home and co-viewing sports media consumption.	Sports is often watched in bars, restaurants, airports, offices, and group settings, and household-level ratings can undercount total individual viewing.	Portable people meters; mobile geolocation-based OOH estimation; app-based OOH signals; improved co-viewing models; person-level attention measurement.	Nielsen PPM; VideoAmp mobile-location-based OOH modeling; iSpot/Tunity-derived OOH signals; TVision co-viewing measurement.
4. Assessing the value of sports sponsorships.	Sponsorships appear in many forms, including in-stadium signage, jerseys, virtual inserts, scorebugs, and sponsored content, and ownership of these assets is fragmented.	AI logo detection; computer vision; exposure-quality scoring; sponsorship reach and frequency; sponsorship-to-outcome linkage; integrated sponsorship dashboards.	Relo Metrics; Samba TV; Hive; Trajectory; Nielsen sponsorship analytics.
5. Measuring attention, engagement intensity, and spot-level audience variation.	Sports audiences fluctuate significantly by game context, score, timing, emotional intensity, co-viewing, and second-screen behavior, making average audience measures potentially misleading.	Spot-level impression measurement; second-by-second audience flow; attention measurement; biometric and emotional engagement analysis; co-viewing models; contextual pricing frameworks.	iSpot audience flow analysis; TVision attention and co-viewing datasets; Mediaprobe emotional engagement analysis; attention-by-break-position studies.
6. Measuring mid- and lower-funnel outcomes.	Reach and frequency do not show whether sports advertising generated visits, searches, sales, app installs, or other commercial actions.	Attribution modeling; search uplift analysis; store visit measurement; app install and in-app behavior measurement; retailer and commerce-linked outcomes.	EDO; Kochava; Captify; Amazon Ads; VideoAmp attribution models; clean-room-enabled outcome measurement.
7. Measuring local and regional sports viewing.	RSNs, local stations, OTA homes, station apps, vMVPDs, and local streams create inconsistent coverage and significant undercounting risk.	Identity-enabled local audience measurement; local-market planning datasets; advanced market-level segmentation; improved tagging and feed-mapping for digital simulcasts.	Ampersand + LiveRamp local sports framework; Nielsen local market systems; Comscore local estimation; advertiser data integration for local planning.

Chapter 3. Innovation in Audience Measurement and Attribution

Measurement challenge	Sports challenges	Emerging measurement solutions	Illustrative companies / approaches
8. Next-day ratings delivery.	Sports requires very fast reporting because of ad accountability, league communications, press coverage, and rights negotiations.	Accelerated overnight and next-day reporting; hybrid systems with faster data fusion; event-specific dashboards; cross-platform near-real-time reporting.	Nielsen next-day currency delivery; broadcaster internal dashboards; faster big-data-supported reporting models.
9. Potential panel bias against multicultural audiences.	Historically, some underrepresented audiences have been harder to recruit and retain in panels, and some big-data sources may also have uneven demographic coverage.	Panel augmentation with big data; improved weighting and calibration; multicultural sample improvement; bias testing across device datasets; audit and governance frameworks.	Panel-plus-data systems; expanded recruitment and weighting practices; cross-source validation; demographic calibration models.

As sports measurement systems evolve, it is increasingly important to distinguish between several related but analytically distinct functions.

Audience measurement seeks to estimate exposure: who watched, when, and on which platform. Attention measurement attempts to estimate the quality or intensity of that exposure. Attribution systems seek to model potential relationships between advertising exposure and downstream consumer behavior. Optimization systems then use these signals operationally to influence media planning, pricing, targeting, or campaign execution.

Although these functions increasingly interact within integrated advertising systems, they are not interchangeable. Conflating exposure measurement with attribution or attention can obscure important methodological differences regarding causality, comparability, and statistical confidence.

Aggregating Viewing Across Fragmented Data Sources

First-party Data Integration

Sports has emerged as a critical test case for the integration of first-party platform data into syndicated measurement currencies. Traditional audience measurement systems have long struggled to capture program-level viewership inside platform environments that are not fully visible to third-party measurement providers. Streaming platforms themselves possess detailed data about streams, device usage, and viewing duration, but historically these datasets have remained proprietary. Sports has become one of the first use cases for changing this model.

Amazon pioneered a more open approach by integrating self-reported Thursday Night Football audience data into Nielsen's measurement outputs. Netflix followed by providing first-party data to Nielsen ONE beginning in late 2023. Netflix's Christmas Day NFL games in 2024 provided a prominent example of how first-party data can materially affect the visibility of streaming sports within syndicated measurement outputs. These developments suggest a path toward hybrid systems that combine panel measurement with first-party platform data, enabling more granular understanding of sports viewing inside previously opaque streaming environments.

Chapter 3. Innovation in Audience Measurement and Attribution

First-party data is now central to the industry's measurement agenda. Innovation in measurement is increasingly tied to data collaboration, identity enablement, and privacy-conscious data-sharing environments that allow platforms and partners to work with sensitive datasets in more controlled ways. The industry is seeing growing importance of first-party ID solutions, data collaboration, and publisher-specific cross-platform planning and optimization tools as part of the broader normalization of advanced video advertising practices.

However, the integration of first-party data into industry measurement products also creates comparability challenges. If one platform contributes title-level census-like data while another does not, or if platforms use different definitions for streams, minimum viewing thresholds, or eligible devices, then apparent comparability may be misleading. A hybrid system may become more complete within an individual platform while becoming less comparable across competing platforms.

As ESPN's Flora Kelly has cautioned, consistent governance will be essential: "First party data brings enormous opportunity, but it also raises the bar for governance. The industry needs clear, shared standards to ensure that richer data doesn't come at the cost of comparability or market confidence."

Over-reliance on platform-reported data could introduce asymmetries in market transparency if independent validation mechanisms do not evolve in parallel.

The challenge is no longer simply whether first-party data can be incorporated technically. Increasingly, the issue is whether it can be incorporated in ways that preserve the year-over-year comparability, franchise-level benchmarking, and competitive neutrality that sports rights owners, agencies, and broadcasters require.



As publishers shift to first-party measurement solutions, year-over-year comparisons become increasingly difficult. How do we evaluate the NFL as a franchise when fragmented first-party ecosystems limit comparability? While we can measure our own audiences, benchmarking against competitors' events is far less clear.

— Kym Frank, SVP Research & Data, FOX

In this sense, first-party data integration is both an important innovation and a governance challenge. It promises to improve visibility into sports audiences inside streaming environments, but it also increases the need for consistent technical definitions, independent standards, and transparent industry oversight.

Identity Fragmentation and Privacy Constraints

While identity-enabled measurement frameworks are becoming increasingly important for cross-platform deduplication and attribution, the long-term stability of these systems remains uncertain. Privacy regulation, signal loss, declining availability of deterministic identifiers, and evolving platform policies are complicating the ability to maintain persistent identity resolution across environments.

In many cases, measurement providers increasingly rely on probabilistic modelling rather than deterministic matching to estimate cross-platform audience overlap. Although such approaches may improve scalability, they can also introduce additional uncertainty into audience estimates and attribution outputs.

The industry therefore faces a structural tension between the desire for increasingly granular measurement and the growing limitations imposed by privacy expectations, regulatory frameworks, and fragmented identity systems. Future measurement architectures may become more probabilistic and model-dependent than the deterministic audience measurement systems that historically underpinned television currencies.

Chapter 3. Innovation in Audience Measurement and Attribution

Other innovative approaches to managing data fragmentation lie in creative combinations of data sources. For example, Nielsen generated a forward-looking model for women's football viewership based on synthesizing numerous internal databases and custom market research provided by its partner, PepsiCo (see case study below).

Case Study

Forecasting the Future of Women's Football

Nielsen set out to answer a high-value question for the sports industry: how large, influential and commercially important could women's football become by 2030?

To answer that question, Nielsen Sports combined multiple data sources into a single forecasting framework. The analysis drew on Nielsen Fan Insights, Nielsen Audience Data, Nielsen SponsorGlobe, bespoke PepsiCo research and practical factors such as tournament hosting schedules. This approach enabled Nielsen to move beyond backward-looking reporting and provide a forward view of audience growth, fan composition and media potential.

Nielsen's analysis projected that women's football will grow its global fanbase by 38% by 2030, surpassing 800 million fans worldwide. Broadcast audiences across major tournaments are also expected to grow by 30% by 2030. Just as importantly, the projected fanbase is highly valuable to brands: by 2030, 60% of women's football fans are expected to be female, 50% will be aged 25–44 and 47% are projected to be top earners, compared with 37% of the global population.

Nielsen's work also identified the structural drivers behind that growth. The analysis showed that major international tournaments act as engagement springboards, with interest rising sharply in host countries and in markets where national teams perform strongly. It further found that women's football already has a global fanbase of more than 500 million and is on a trajectory to enter the top five most followed sports globally by 2030.

Nielsen's innovative approach connected audience measurement, fan intelligence and commercial strategy. In addition to showing that interest in women's football is growing, Nielsen quantified the scale, profile and future value of that growth, and highlighted that women's sports still attract only a fraction of global sponsorship investment despite the size and spending power of their audiences. By turning disparate inputs into a predictive measurement model, Nielsen's analysis equipped brands, rights holders and media companies with evidence to make smarter sponsorship, media and investment decisions.



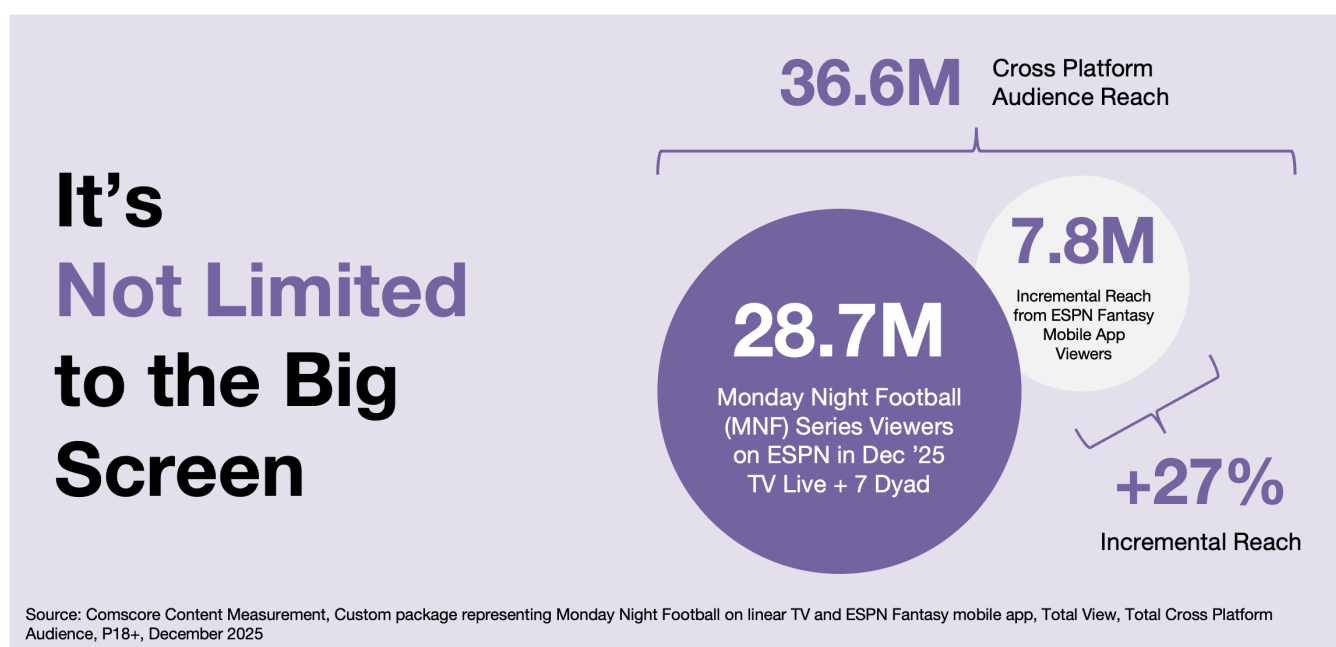
Source: Nielsen Fan Insights 2019-2025; Nielsen Sports Audience data and modeling.

Second-Screen Measurement

Sports fans are among the most active second-screen users, extending their content consumption from televised matches to laptop and mobile engagement with social media, sports fantasy leagues, sports betting, highlights, and other digital touchpoints.

Comscore, with its roots in digital and web traffic measurement, has worked to track multi-screen engagement in sports. During March Madness, for example, Comscore reported that Duke generated 5.4 million social media engagements despite not winning the tournament, while the Florida Gators generated 2.7 million. Comscore has also tracked strong growth in sports-related social activity, including a reported 96 percent increase in NFL TikTok engagements between 2024 and 2025. Similarly, Monday Night Football on ESPN reportedly achieved an incremental reach lift of 31 percent in December 2024 when ESPN Fantasy Mobile App users were incorporated into the analysis, illustrating how second-screen usage can extend the reach of a sports franchise beyond live television viewing.

Exhibit 10. Comscore ESPN cross-platform case study



Source: Comscore

Sports second-screen behavior should no longer be treated as marginal. It is increasingly central to how sports fandom operates.

Chapter 3. Innovation in Audience Measurement and Attribution

Individual publishers are also working to capture the full scope of sports-related audience engagement by developing bespoke, holistic metrics. ESPN, for example, has developed internal approaches that aggregate engagement across broadcast ratings, clips, websites, breaking news consumption, and views of sports talk content on YouTube and TikTok. FOX, the NBA, and other organizations are similarly experimenting with internal metrics designed to combine live viewing, highlights, social activity, and other touchpoints into a broader picture of sports brand engagement.



Watching live games is just one piece of the puzzle. There are so many other touch points within the NBA ecosystem, whether it's watching highlights of an NBA game, following the league or players in social media, or even placing a bet on the game. These are all forms of brand engagement, and all these actions should be factored in when measuring success and assessing the overall value of the NBA brand.

— Michelle Auguste, VP of Global Media Insights, NBA

The second-screen challenge is not simply one of data collection. It is also one of deciding what counts as sports media consumption and how those touchpoints should be valued relative to live viewing. Highlights, betting interactions, fantasy participation, podcast listening, and social engagement do not fit neatly into traditional TV audience currencies. Yet they clearly contribute to fan value, franchise value, and the total commercial impact of sports content.

The rise of sports betting further intensifies this challenge. Betting platforms generate large amounts of time-sensitive data about fan behavior and interest, but these data rarely connect cleanly to conventional audience measurement systems. For the industry, second-screen measurement increasingly raises a strategic question: is the goal merely to count live audiences more precisely, or to build a broader model of total sports engagement that encompasses the surrounding fan economy?

Out-of-Home Measurement

Out-of-home viewing remains one of the most difficult dimensions of television measurement, particularly for live sports, where substantial portions of the audience watch in bars, restaurants, gyms, airports, hotels, and other communal environments. Recognizing the need to capture these audiences more completely, measurement providers such as Nielsen, VideoAmp, and iSpot have all introduced or expanded OOH tracking capabilities in recent years.

Nielsen's approach relies on its Portable People Meter, a small wearable device carried by panelists that detects inaudible audio watermarks embedded in TV broadcasts. When the device registers a watermark while the panelist is away from home, Nielsen logs an OOH exposure, which is then scaled through demographic weighting and modeling. In early 2025, Nielsen expanded this service from roughly 65 percent to 100 percent of the U.S. television population, integrating OOH more fully into its national measurement outputs.

However, measurement in these environments remains challenging, where screens may be muted or where a small number of detected panelists are used to infer much larger audiences.

VideoAmp has expanded into OOH measurement through a different approach, linking its audience datasets built from smart-TV and set-top-box data with third-party mobile geolocation signals. By identifying when devices are present in commercial venues and cross-referencing those data with program schedules and viewing information, VideoAmp can infer when groups are likely exposed to televised content outside the home.

As VideoAmp's EVP of Customer Solutions, Dan Donnelly, noted, this represents a break from models dependent on people physically wearing and maintaining hardware devices: "For measurement to work, panelists have to wear the device, remember to charge it, leave the house, and then hope the bar is playing the game with the audio on, which is often not the case."

Chapter 3. Innovation in Audience Measurement and Attribution

iSpot's OOH capabilities were strengthened through its acquisition of Tunity, a mobile app that enabled users to stream synchronized audio from muted televisions in public places. Every time a user tuned in to a muted screen, the app captured time-stamped data about the program, venue, and duration of viewing. iSpot now integrates these signals into its broader measurement system alongside ACR and other data sources.

The showcase added an important additional layer to the OOH discussion: the distinction between presence, attention, and mere exposure. TVision's research showed that sports programming exhibits especially high co-viewing rates across both linear and CTV, with football at 68.2 percent, hockey at 64 percent, soccer at 62 percent, baseball/softball at 61 percent, and basketball at 59.9 percent. These levels exceed non-sports content and suggest that sports are frequently consumed in social environments, whether inside or outside the home. TVision's emphasis on "who's watching, when, and how engaged they are" highlights that simply counting impressions is not enough; the industry increasingly wants a fuller picture of the viewer journey.

Out-of-home measurement should therefore be understood not simply as a coverage gap, but as part of the broader transition toward person-level and context-aware audience analytics.

Valuing Sponsorships

Sports sponsorships represent a substantial share of marketing investment — including courtside takeovers, uniform branding, and sponsored halftime programming — yet their value has historically been difficult to assess. Measurement challenges include simultaneous logo placements, variation in visual prominence, and the difficulty of quantifying exposure duration. In response, a growing number of vendors are developing AI-driven logo detection and measurement solutions to quantify both the exposure and value of sponsorship assets.

These sponsorship analytics providers are applying computer vision, AI-driven logo recognition, contextual analysis, and attribution modelling to quantify the visibility and commercial impact of sponsorship assets embedded within sports broadcasts. Vendors including Trajectory, Relo Metrics, Samba TV, and Hive increasingly measure factors such as logo prominence, exposure duration, screen share, contextual placement, social amplification, and downstream audience behavior. Some systems also integrate sponsorship exposure with search behavior, app usage, purchase intent signals, or retail outcomes.

Collectively, these approaches reflect a broader shift in sponsorship valuation. Historically, sponsorships were frequently evaluated using estimated media equivalency metrics and broad brand-lift assumptions. Emerging systems instead seek to position sponsorship inventory within more measurable exposure-and-outcome frameworks that increasingly resemble conventional advertising analytics. The most sophisticated solutions go behind measuring individual sponsorship placements to provide a unified measurement framework that helps brands and leagues compare, package, price and evaluate sponsorship performance across a fragmented portfolio of media buys.



The next era of sports sponsorships won't be defined by more metrics, but by one unified measurement system. Connecting live impressions in-venue, on radio, broadcast and streaming with 'halo-effect' engagements across TV, social, the web and email is now table stakes reporting. The future of sports measurement is one system that tracks performance across every channel, empowering brands and rights holders to price, package, and invest smarter.

— Alex Kerr, CEO, Trajectory

At the same time, methodological fragmentation remains substantial. Differences in exposure definitions, visibility thresholds, attribution windows, and modelling assumptions complicate comparability across vendors. As sponsorship measurement becomes more commercially significant, questions regarding standardization, transparency, and independent validation are likely to become increasingly important.

Samba TV worked with a large energy company to assess the value of an ongoing Formula 1 Australian Grand Prix sponsorship. As Exhibit 10 details, a post campaign analysis revealed that the energy company earned almost five times the visibility of other sponsors in the same category, and that its logo was the most prominently positioned on the screen 90% of the time. Moreover, its logo was visible exclusively 13% of the time. Samba TV's analytic solutions includes performance metrics such as prominence score, share of voice, and exclusive logo instances.

Exhibit 11: Samba TV Case Study

Formula 1 Sponsorship Earns Greater Visibility than Similar Competitive Sponsors

Challenge

One of the world's largest energy companies invested in a sponsorship campaign at the Formula 1 Australian Grand Prix and wanted to better understand logo visibility and share of voice vs. competitive brands who also sponsored the event.

Samba Solution

Samba AI™ captured detailed insights about the sponsorship's reach, frequency, share of voice, and visibility. The insights supported future investment and sponsorship decisions for the brand.

Results

+4.7x

earned **+4.7x greater visibility*** than the other oil sponsors.

90%

of impressions had a prominence score of 1, indicating it was the **most prominent logo on screen during that time.**

13%

The logo was the only one present on the screen for 13% of the total time the logo appeared in the broadcast.

**As measured by ad frequency of the brands ads vs. the average of other oil sponsors in the race.*

Source: SambaTV

Measuring Mid- and Lower-Funnel Outcomes

Historically, the value of sports advertising was assessed primarily through audience delivery metrics such as ratings, reach, frequency, and sponsorship visibility. However, advances in identity resolution, behavioral data integration, and AI-driven analytics are increasingly enabling advertisers to evaluate sports media through a lower-funnel and business outcomes lens. This marks a broader shift in the sports advertising ecosystem: from measuring whether audiences saw advertising, toward understanding whether advertising changed behavior.

A growing number of measurement providers are attempting to connect sports media exposure with consumer actions such as search activity, website visitation, app downloads, retail traffic, and purchases. Rather than treating sports sponsorships and live sports advertising as primarily upper-funnel brand-building investments, advertisers are increasingly seeking evidence that sports media can drive measurable commercial outcomes comparable to digital performance channels.

One important emerging trend is the use of real-time or near-real-time behavioral signals as proxies for advertising effectiveness. For example, EDO has focused heavily on measuring spikes in online search behavior following television advertising exposures, including live sports programming. This reflects a broader industry interest in "behavioral lift" metrics that can provide more immediate signals of consumer engagement than traditional brand tracking studies. Such approaches are particularly attractive in sports environments, where live viewing and concentrated audience attention may generate rapid consumer response.

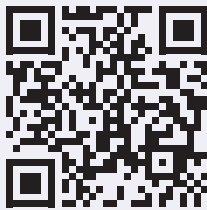
Chapter 3. Innovation in Audience Measurement and Attribution

At the same time, mobile and location-based attribution techniques are increasingly being applied to sports advertising and sponsorship measurement. Companies such as Kochava are part of a wider ecosystem attempting to connect cross-platform advertising exposure with downstream consumer actions occurring on mobile devices, apps and in the real-world. These approaches illustrate the industry's broader ambition to build more persistent and deterministic links between media exposure and conversion behavior across fragmented viewing environments.

Case Study

Kochava provides custom technology called SmartLinks to empower brands to publish QR codes for TV screens and other surfaces which allow advertisers to drive direct response (app downloads, website visits, etc) from customers. An example is Coinbase's 2022 Super Bowl TV ad, which featured a floating QR code and generated more than 20 million site visits within one minute, temporarily overwhelming the company's infrastructure.

Exhibit 12: Coinbase Superbowl Ad



Another emerging trend involves the integration of intent and search intelligence into sports measurement frameworks. Captify, for example, has explored how search activity and intent signals can help advertisers understand changing consumer interest surrounding sports events, sponsorships, and campaigns. More broadly, the incorporation of search and intent data reflects a growing recognition that sports advertising effectiveness may increasingly be evaluated through the lens of audience responsiveness and purchase consideration, rather than solely through demographic delivery metrics.

Collectively, these developments point toward a broader transformation in sports media measurement. As advertisers seek greater accountability and comparability across media channels, sports television is increasingly being evaluated using methodologies historically associated with digital performance marketing.

The expansion of outcomes-based measurement may strengthen the strategic position of sports media within the advertising ecosystem. Live sports remain one of the few forms of television programming capable of consistently delivering large simultaneous audiences with high levels of engagement and attention. As measurement capabilities improve, sports broadcasters, leagues, and advertisers are increasingly seeking to demonstrate that these engagement advantages translate not only into awareness, but into measurable business performance.

Although these innovations are expanding the range and granularity of measurable signals available to the marketplace, they also introduce new questions regarding transparency, comparability, governance, and competitive neutrality. As measurement systems become increasingly dependent on first-party data, probabilistic modelling, and platform-controlled infrastructure, institutional questions surrounding validation and market trust become more consequential. The next chapter examines these broader governance dynamics.

Chapter 4. Measurement Governance and the Future of Sports Media Markets

The evolution of sports media measurement is no longer solely a technical or methodological issue. It is increasingly shaped by broader questions of market governance, data ownership, standardization, and competitive strategy. As measurement systems become more complex and more commercially consequential, the institutional frameworks that support measurement credibility are becoming a central concern for industry stakeholders.

The central challenge facing sports measurement is unlikely to be the absence of data. Rather, it is the governance of increasingly abundant but asymmetrically controlled data in ways that preserve transparency, comparability, competition, and market confidence.

As measurement systems become more dependent on platform-controlled datasets, probabilistic modelling, clean-room environments, and synthetic estimation techniques, institutional questions regarding auditability, disclosure standards, and competitive neutrality become increasingly consequential. The future of sports measurement may therefore depend as much on governance structures as on technological innovation itself.

This chapter examines the structural dynamics that are likely to shape the next phase of sports measurement development.

The Role of Data Collaboration Environments in Sports Attribution

As advertisers seek more precise evidence of the impact of sports media investments, data collaboration environments (clean rooms) have emerged as an important component of attribution frameworks. These environments enable multiple parties to analyze aggregated datasets without sharing raw personally identifiable information, thereby supporting privacy-compliant measurement.

In sports contexts, data collaboration environments can facilitate the linkage of exposure data from broadcasters or streaming platforms with advertiser first-party customer data, retail transaction datasets, or digital engagement signals. This enables more sophisticated modelling of campaign outcomes, including incremental sales lift, customer acquisition, and cross-channel conversion behavior.



Data isn't a binary choice between publisher and agency datasets. Bringing the best of both together is essential for creating consented, focused datasets that protect users and reduce data leakage. Since both sides have built unique, valuable relationships with consumers, clean rooms are impactful to help deduplicate overlapping data. Our goal is to empower both sides to connect with and reach users in more effective and privacy-safe ways.

— Inderpreet Sandhu, Global Head of CTV Partner Development & Growth, Google

However, the adoption of such environments also introduces new challenges. Differences in data governance policies, identity resolution approaches, and modelling assumptions may affect the comparability of attribution findings across platforms. Furthermore, the increasing reliance on proprietary collaboration environments operated by large technology firms may raise questions about measurement independence and transparency.

As these tools become more widely used in sports advertising, the development of shared principles for data collaboration and validation may become increasingly important to ensure consistent and credible outcome measurement.

Data Power Asymmetry and Measurement Independence

A second structural issue concerns the distribution of data power within the sports media ecosystem. Increasingly, key datasets relevant to sports measurement — including streaming viewership logs, device-level viewing signals, retail transaction data, and identity graphs — are controlled by a relatively small number of large platforms.

This concentration of data ownership creates both opportunities and risks. On the one hand, access to large-scale first-party datasets can improve the completeness and granularity of measurement systems. On the other hand, reliance on platform-controlled data raises questions about measurement independence and competitive neutrality. Concentration of data ownership may also influence innovation pathways by shaping which measurement methodologies are technically feasible or commercially viable.

If measurement frameworks depend heavily on data contributions from rights holders or distributors themselves, the boundary between independent measurement and self-reported performance may become blurred. Ensuring that measurement systems remain transparent, auditable, and broadly trusted will be a key institutional challenge for the industry.

Governance Risks and Institutional Constraints

Several structural risks may complicate the future development of sports measurement markets.

First, increasing reliance on proprietary platform data may reduce independent visibility into audience behavior if third-party verification mechanisms weaken. Second, fragmentation across currencies, attention metrics, and attribution systems may increase transaction complexity and reduce comparability for buyers and sellers. Third, growing dependence on probabilistic modelling and synthetic estimation may make it more difficult for market participants to evaluate methodological reliability and uncertainty.

Institutional incentives may also diverge materially across stakeholders. Platforms may prioritize proprietary performance measurement that reinforces ecosystem lock-in and competitive differentiation. Advertisers and agencies, by contrast, generally benefit from independent comparability and interoperable standards. Rights holders may seek metrics that maximize perceived audience scale and engagement value, while measurement providers face commercial incentives to differentiate methodologies rather than standardize them fully.

These competing incentives suggest that governance challenges in sports measurement are unlikely to be resolved solely through market competition. Collaborative oversight structures, independent auditing mechanisms, and transparent methodological disclosure may become increasingly important in sustaining trust across fragmented measurement environments.



Fragmentation and the Tension Between Innovation and Standardization

The sports measurement marketplace is currently characterized by a dynamic tension between methodological innovation and the need for standardization. New tools — including AI-driven content recognition, biometric engagement analysis, identity-enabled attribution, and sponsorship analytics — are expanding the range of measurable media signals. These innovations offer valuable insights into fan behavior and campaign performance.

However, innovation can also increase fragmentation if different stakeholders adopt incompatible metrics, taxonomies, or modelling assumptions. For advertisers, agencies, and rights owners, comparability across platforms remains essential for media planning, negotiation, and evaluation.

When innovation is anchored in viewer-centric design principles, where ad experiences are built to complement rather than interrupt the live sports experience, the resulting engagement metrics may be more naturally comparable across services, because they measure genuine audience behavior rather than platform-specific technical signals.

The challenge for the industry is to foster innovation while maintaining sufficient standardization to support consistent trading frameworks. Achieving this balance will likely require ongoing collaboration between measurement providers, media companies, advertisers, and industry bodies.

A related risk is the proliferation of measurement signals without corresponding improvements in interpretability or decision utility. As advertisers gain access to expanding volumes of audience, attention, attribution, sponsorship, emotional engagement, and commerce-linked metrics, there is a possibility that analytical complexity may outpace operational clarity.

In such environments, stakeholders may face difficulties distinguishing between metrics that are economically meaningful and those that are merely measurable. Excessive proliferation of proprietary KPIs could increase transaction complexity, reduce comparability, and contribute to “signal saturation” in which the abundance of available metrics complicates rather than improves decision-making.

The long-term value of measurement innovation may therefore depend not only on the generation of additional signals, but also on the industry’s ability to establish coherent frameworks for prioritizing, interpreting, and standardizing those signals within practical commercial workflows.

Globalization of Sports Measurement Frameworks

The commercialization of sports media rights has become increasingly global in scope. Major competitions such as the Premier League, Formula 1, the Olympic Games, and international football tournaments are distributed across multiple markets with differing measurement infrastructures and audience behaviors.

This globalization creates challenges for advertisers and rights owners seeking consistent cross-market evaluation of audience reach and sponsorship effectiveness. Measurement standards, data availability, and currency frameworks vary significantly across countries, making direct comparisons difficult. In some markets, panel-based ratings remain dominant; in others, large-scale device datasets or platform-reported metrics play a more prominent role. Many of the structural challenges and measurement innovations observed in the U.S. marketplace — including cross-platform deduplication, first-party data integration, and outcome-based attribution — have direct parallels in international markets where similar fragmentation dynamics are occurring.

As international sports properties expand their commercial partnerships, there may be growing demand for harmonized measurement principles that support global campaign evaluation while respecting local market differences. Initiatives aimed at improving cross-market comparability — including standardized definitions of impressions, attention metrics, and sponsorship exposure — could help to reduce uncertainty and facilitate more efficient global media planning.

Chapter 4. Measurement Governance and the Future of Sports Media Markets

At the same time, fully unified global measurement currencies are unlikely to emerge in the near term. Instead, the industry may evolve toward interoperable frameworks that enable translation between national measurement systems.

Different international markets have historically adopted different institutional approaches to audience measurement governance. In several countries, Joint Industry Committees (JICs) or similarly collaborative structures have played a central role in overseeing methodology, accreditation, and currency development. Examples include BARB in the United Kingdom, OzTAM in Australia, and Médiamétrie in France.

These systems differ materially from the more commercially fragmented U.S. measurement environment, where multiple competing providers and proprietary platform datasets increasingly coexist. While no governance model fully resolves the tensions between innovation, transparency, and competition, international comparisons suggest that collaborative oversight structures may help support greater market confidence and methodological consistency during periods of technological transition.

Artificial Intelligence-Enabled Measurement Architectures

Advances in artificial intelligence are increasingly shaping the evolution of sports audience measurement methodologies. Machine learning techniques are now widely deployed across multiple components of measurement systems, including content recognition, logo detection, audience segmentation, identity resolution, and attribution modelling. These tools are helping measurement providers process large-scale datasets and generate more granular insights into viewing behavior across fragmented distribution environments.

A particularly important emerging application is the use of synthetic data and predictive modeling to address gaps in direct observation. In cross-platform sports viewing contexts — where rights distribution spans broadcast networks, streaming platforms, social media environments, and out-of-home venues — it is often not possible to observe every exposure event directly. AI-driven modelling approaches can combine observed signals from panels, device datasets, and first-party platform data with probabilistic estimates of audience overlap, co-viewing behavior, and temporal viewing patterns. Such techniques have the potential to improve the scalability and timeliness of audience estimates, as well as support more responsive campaign measurement.

At the same time, the growing reliance on modelled or simulated data introduces new methodological and governance considerations. Increased use of synthetic reach modelling may improve coverage but can also reduce the intuitive transparency of measurement outputs. Advertisers, agencies, broadcasters, and rights holders may require clearer documentation of modelling assumptions, uncertainty ranges, and validation processes in order to maintain confidence in reported metrics. Differences in modelling approaches across measurement providers could also complicate comparability if common standards do not emerge.

As artificial intelligence becomes more deeply embedded in measurement architectures, questions of algorithmic governance and auditability are likely to assume greater importance. Industry stakeholders may need mechanisms to ensure that AI-enabled measurement frameworks remain credible, interpretable, and resistant to unintended bias. Establishing shared norms around methodological disclosure, independent validation, and performance benchmarking may be critical to sustaining trust in audience metrics in increasingly data-rich and model-driven sports media marketplaces.

Looking ahead, advances in data integration, probabilistic modelling, and artificial intelligence may contribute to the emergence of increasingly synthetic audience currencies: measurement systems that combine directly observed behavior with modelled estimates to construct unified cross-platform trading metrics.

Such systems could improve coverage across fragmented viewing environments where complete direct observation is not feasible. However, they may also reduce methodological transparency by making reported audience estimates more dependent on proprietary modelling assumptions rather than directly observable exposure data.

Chapter 4. Measurement Governance and the Future of Sports Media Markets

The credibility of synthetic currencies will therefore depend heavily on governance structures capable of supporting methodological disclosure, independent auditing, confidence interval reporting, and consistent validation standards. Without such safeguards, increasingly model-driven measurement systems risk weakening market comparability and advertiser confidence even as analytical sophistication improves.

However, their adoption may also raise important questions regarding transparency, methodological governance, and market acceptance. The credibility of synthetic currencies will likely depend on the development of shared validation standards, independent audit mechanisms, and clear communication of uncertainty ranges. As sports media continues to function as a testing ground for measurement innovation, the evolution of synthetic currencies may play a significant role in shaping the future structure of television audience trading systems.

Artificial intelligence is also beginning to reshape sports content itself, not only its measurement. Automated clipping systems, AI-generated highlights, personalized recap feeds, synthetic commentary, and conversational sports interfaces are expanding the ways in which audiences encounter sports content outside traditional live broadcasts.

These developments may further complicate conventional measurement frameworks because exposure increasingly occurs through fragmented, personalized, and dynamically generated media experiences rather than through standardized program streams alone. Sponsorship visibility, advertising exposure, and fan engagement may become distributed across large volumes of derivative sports content generated or assembled algorithmically.

Over time, the distinction between “live sports viewing” and broader sports media consumption may become increasingly blurred, creating new challenges for rights valuation, audience comparability, and attribution modelling.

As audience measurement systems incorporate larger volumes of modelled and synthetic data, concerns regarding transparency and auditability are likely to intensify. Hybrid measurement architectures increasingly combine directly observed viewing behavior with probabilistic estimates of audience overlap, co-viewing, attention, and exposure duration. While such approaches may improve coverage and scalability, they can also make it more difficult for buyers and sellers to independently evaluate how reported metrics are constructed.

In highly fragmented viewing environments, modelled estimates may become unavoidable. However, excessive reliance on opaque modelling frameworks risks reducing confidence in measurement outputs, particularly when methodologies differ significantly across vendors or platforms. The industry may therefore require stronger standards around methodological disclosure, confidence intervals, independent auditing, and uncertainty reporting in order to preserve trust in increasingly synthetic measurement systems.

These concerns are especially important in sports media because of the scale of associated rights valuations and advertising commitments. Even relatively small modelling inconsistencies can have significant financial implications when applied to premium sports inventory.

Clean-Room Dependency and Platform Measurement Power

As cross-platform measurement increasingly relies on privacy-preserving data collaboration environments, such as data clean rooms, new forms of dependency on large digital platforms may emerge. Clean rooms can enable secure matching of exposure and outcome datasets without direct sharing of personally identifiable information, supporting more sophisticated attribution and audience analytics. However, when access to these environments is controlled by a limited number of platform operators, measurement providers, broadcasters, and advertisers may face constraints regarding data interoperability, methodological transparency, and analytical flexibility. This concentration of data infrastructure can influence how measurement standards evolve and may affect the balance of negotiating power in advertising and rights markets. Ensuring that clean-room-enabled measurement frameworks remain open, auditable, and capable of supporting independent verification is likely to become an important consideration for industry governance as sports media measurement continues to evolve.

Currency Fragmentation and the Risk to Market Comparability

The sports media marketplace is currently characterized by the coexistence of multiple audience measurement frameworks, including traditional syndicated ratings, alternative currency providers, platform-reported metrics, and advertiser-specific attribution systems. While this diversity can stimulate innovation, it also raises concerns about fragmentation and comparability.

For advertisers and agencies, the ability to compare audience delivery and performance across platforms remains essential for effective media planning and negotiation. If different stakeholders rely on incompatible measurement methodologies or proprietary metrics, the resulting lack of transparency may increase transaction costs and reduce confidence in reported outcomes.

Sports programming, given its economic importance and fragmented distribution, sits at the center of this evolving currency debate. The industry's response to currency fragmentation — whether through convergence toward shared standards, continued competition among measurement providers, or hybrid trading frameworks — will have broader implications for the future structure of television advertising markets.

Collaborative industry initiatives that promote methodological transparency and interoperability may help to balance innovation with the need for consistent and trusted measurement frameworks. The trajectory of sports measurement may foreshadow broader shifts in television advertising markets toward pluralistic currency ecosystems with negotiated interoperability rather than single-provider dominance.

Measurement as a Competitive Strategic Asset

Measurement is also becoming more explicitly intertwined with competitive positioning in the sports marketplace. As media rights become more expensive and distribution becomes more fragmented, the ability to demonstrate audience scale, engagement quality, and commercial impact can influence negotiations between leagues, broadcasters, and platforms.

In this context, measurement capabilities themselves may become a source of strategic differentiation. Platforms that can provide richer audience insights or more robust attribution evidence may strengthen their position in rights auctions or advertising negotiations. Similarly, leagues that can demonstrate comprehensive cross-platform reach and fan engagement may enhance the perceived value of their media properties.

This dynamic suggests that measurement is evolving from a neutral market infrastructure into an increasingly strategic capability. This evolution underscores the importance of independent measurement frameworks capable of preserving comparability as measurement becomes more strategically embedded in competitive market dynamics.

Forward-Looking Scenarios for Sports Media Measurement

The future structure of sports media measurement is likely to be shaped by technological innovation, evolving commercial incentives, and institutional governance choices. While outcomes remain uncertain, three plausible forward-looking scenarios illustrate how measurement frameworks could develop over the coming decade.

Scenario 1

Unified Currency Convergence

In this scenario, industry stakeholders gradually align around a limited number of interoperable cross-platform measurement frameworks capable of delivering comparable reach, frequency, and outcome metrics across broadcast, streaming, and digital environments. Advances in hybrid panel-plus-big-data systems, improved identity-enabled deduplication methodologies, and stronger governance standards could support convergence toward a broadly accepted “currency-grade” measurement architecture.

Such convergence could reduce transaction complexity for advertisers and media owners, improve pricing transparency, and enhance investor confidence in rights valuations. However, achieving unified currencies would likely require sustained collaboration across competing platforms, measurement providers, and industry bodies, as well as agreement on methodological disclosure and validation protocols.

Scenario 2

Platform Metric Dominance

An alternative trajectory could see major digital platforms increasingly promoting their own proprietary measurement frameworks as primary trading metrics for sports advertising inventory. In this environment, first-party viewing data, clean-room-enabled attribution models, and retail transaction signals may become central to campaign evaluation within platform ecosystems.

While platform-centric measurement could deliver highly granular performance insights, it may also fragment comparability across distributors and reduce the role of independent syndicated currencies. Advertisers and rights holders could face greater complexity in reconciling performance metrics across multiple proprietary systems, potentially increasing reliance on negotiated benchmarks or third-party verification.

Scenario 3

Hybrid Negotiated Currency Systems

A third scenario may involve the emergence of pluralistic measurement markets in which multiple currencies coexist and are applied selectively depending on campaign objectives, distribution channels, or commercial negotiations. In such environments, advertisers and media sellers may use a combination of syndicated audience measurement, platform analytics, sponsorship exposure metrics, and outcome-based attribution tools.

Hybrid currency systems could offer flexibility and encourage methodological innovation, but they may also introduce governance challenges related to comparability, transparency, and market stability. Industry coordination mechanisms — including audit standards, methodological guidelines, and dispute-resolution frameworks — may become increasingly important to ensure that diverse measurement approaches can function effectively within shared trading environments.

Conclusion

The evolution of sports measurement reflects broader structural shifts in television markets toward cross-platform distribution, data-driven advertising, and pluralistic currency ecosystems. Sustained progress will depend not only on technological innovation but also on the development of governance frameworks that support transparency, comparability, and competitive neutrality.

The future of sports measurement will not be determined solely by advances in data science or audience analytics. It will depend equally on the institutional frameworks that govern transparency, comparability, interoperability, and trust across increasingly fragmented media environments.

Sports has emerged as the leading experimental environment for the future of television measurement because the economic stakes are unusually high, the distribution landscape is deeply fragmented, and advertisers increasingly demand evidence not only of audience exposure, but of engagement and measurable business outcomes.

The systems now being developed to measure sports audiences are likely to influence the future structure of premium video markets more broadly. Questions surrounding platform-controlled datasets, synthetic modelling, probabilistic attribution, clean-room dependency, and measurement governance are no longer peripheral technical concerns. They are increasingly central to how media value is defined, traded, financed, and regulated.

The long-term challenge for the industry is likely to focus on establishing governance frameworks capable of ensuring that increasingly complex measurement systems remain transparent, comparable, independently verifiable, and broadly trusted across fragmented markets.

In this sense, the evolution of sports measurement reflects a broader restructuring of the television economy itself: from a relatively standardized audience marketplace toward a more fragmented, data-intensive, and strategically contested system of media valuation.

About the Contributors and Participants

Comscore

Comscore is a global, trusted partner for planning, transacting, and evaluating media across platforms. With an unmatched data footprint that combines digital, linear TV, over-the-top and theatrical viewership intelligence with advanced audience insights, Comscore empowers media buyers and sellers to quantify their multiscreen behavior and make meaningful business decisions with confidence. A proven leader in measuring digital and TV audiences and advertising at scale, Comscore is the industry's emerging third-party source for reliable and comprehensive cross-platform measurement.

EDO

EDO is the TV outcomes company. EDO's leading measurement platform connects convergent TV airings to the ad-driven consumer behaviors most predictive of future sales. EDO empowers the advertising industry to maximize media impact, measure creative performance, and know the fair value of every impression — across linear and streaming for an increasingly programmatic world. By combining immediate engagement signals with world-class decision science and vertical AI, EDO equips industry leaders with syndicated, investment-grade data that aligns media to business results. Leading brands, agencies, networks, streamers, and studios trust EDO's TV intelligence to know what works.

EDO measures TV outcomes by analyzing the consumer behaviors — searches, site visits, and other engagement signals — that are [independently proven](#) to be most predictive of future sales. When an ad airs, EDO captures the immediate response it generates among viewers, producing a precise, actionable measure of advertising effectiveness. In the high-stakes, high-cost environment of live sports, this measurement is essential for helping brands, agencies, networks, streamers, and leagues pinpoint the fair value of their media.

Live sports remains the most powerful advertising environment in television. EDO's mid-funnel TV outcomes measure that power precisely. For networks and streamers, EDO's outcomes measurement substantiates the premium value of live sports inventory with behavioral data that goes beyond traditional audience metrics. For brand and agency media buyers, EDO data provides the clarity and confidence to assess fair market value and evaluate the true return on their investment.

For over a decade, EDO has proven itself a leader in TV outcomes measurement for live sports, delivering real-time, mid-funnel consumer engagement data on linear and streaming TV, demonstrating the extraordinary value of live sports for brands, networks, and streamers alike. EDO delivers invaluable TV outcomes insights across Amazon's Thursday Night Football, NBCUniversal's Olympics coverage, and a host of major sports properties on Disney, FOX, Netflix, Paramount, WBD, and more. Through these partnerships, EDO provides the Convergent TV ad ecosystem with the immediate, transparent, objective outcomes data necessary to enable confident investment decisions, deliver meaningful post-campaign accountability, and empower creative and media optimization.

Every year, [EDO's Super Bowl Ad Outcomes Ranker](#) brings outcomes measurement to the industry's most visible stage. Featured annually by Adweek, EDO's ranker measures the consumer engagement performance of every ad that airs during the Super Bowl, giving brands, agencies, and media observers an objective accounting of which creative executions broke through — and which fell short. It has become a trusted annual benchmark for advertising effectiveness at the highest level of live sports.

More recently, in Women's Sports, EDO has led a long-overdue conversation on the measurable power of brand advertising investment — and performance — in this fast growing category. In its third annual [Women's Sports TV Outcomes Report](#), EDO continues to produce a comprehensive body of evidence on advertising effectiveness in women's sports programming. This research has equipped brands, agencies, and rights holders, and advertisers with the empirical foundation to make the case in a category that consistently outperforms expectations. Throughout the year, EDO regularly produces similar TV outcomes research for sports programming across the NCAA, NBA, NFL, NHL, Spanish Language content, and more.

About the Contributors and Participants

ESPN

ESPN's research and measurement teams focus on advancing cross-platform audience understanding, improving comparability across linear and streaming distribution and developing frameworks that more accurately reflect how fans engage with sports across live games, digital and social. ESPN is an active participant in industry initiatives focused on measurement and innovation, working collaboratively to help evolve standards that support a credible, competitive and sustainable sports media marketplace.

Google

The advertising measurement landscape is evolving, driven by agency demand for proof of causality (incrementality) and publisher needs for unified, cross-device measurement solutions that increase the value of their audiences. To bridge the gap between sell-side inventory and buy-side measurement currency, Google provides publishers with solutions to tell a differentiated audience story that resonates with agencies.

(1) Audience-first deals via curation: Google partners with trusted third-party data providers to apply sell-side decisioning to curated auction packages. Buyers achieve incremental reach in cookieless environments with improved match rates, better forecasting based on true publisher availability, and holistic cross-DSP measurement. Publishers maintain full control over the secure signals they opt to share and gain enhanced transparency into how their data is used through dedicated reporting dimensions.

(2) Proving value with impact estimates: For years, secure signals have enabled publishers to share protected audience data directly with trusted buyers, acting only as a secure pipeline to pass data without Google viewing or using it. The introduction of impact estimates now allows publishers using Google Ad Manager 360 to quantify incremental value through sophisticated holdback experiments. By clearly showing revenue lift by bidder, the tool addresses the growing demand for outcome-based measurement in high-stakes sports environments. It offers rights holders a powerful way to prove the premium value of their live inventory and data.

(3) Supercharging audience management: Google continues to create paths to onboard new data types and providers in Google Ad Manager. This enables publishers to execute audience-based buys that agencies want, especially omni-channel campaigns. Agencies want to address fans through every context — from CTV homescreens to standard in-content breaks to performance offers on mobile devices — while prioritizing performance as the ultimate measure of success.

These initiatives — focusing on trusted third-party validation, first-party data enrichment, and strong publisher audience management — are essential for helping publishers showcase differentiation and drive greater advertiser outcomes by speaking the agency's measurement language.

Nielsen

Nielsen is a global leader in audience measurement, data and analytics. Through its understanding of people and their behaviors across all channels and platforms, Nielsen empowers its clients with independent and actionable intelligence so they can connect and engage with their global audiences — now and into the future. Learn more at www.nielsen.com and connect with Nielsen on social media ([X](#), [LinkedIn](#), [YouTube](#), [Facebook](#) and [Instagram](#)).

Samba TV

Samba TV is the global leader in AI-driven media intelligence, empowering the world's top brands, agencies, and publishers with real-time insights and advanced tools for identity, contextual, audience modeling and activation. Powered by proprietary first-party data from tens of millions of opted-in TVs and billions of web signals, Samba enables advertisers to unify the consumer journey across every screen. Samba's independent measurement is future-ready, enabling marketers to reach and engage audiences with precision across any platform or device. Learn more at samba.com/business.

About the Contributors and Participants

Trajektory

Trajektory is a unified sponsorships intelligence platform that helps some of the most well-known sports and entertainment organizations, brands, and agencies measure total sponsorship performance across video, audio, social, and in-venue exposures. Trajektory is focused on solving one of the most important challenges in modern sports measurement: how to bring consistency, comparability and transparency to measuring and valuing sponsorships in an increasingly complex and fragmented commercial ecosystem.

One of the biggest risks in sports measurement today is mistaking activity-level measurement for market-level progress. The industry has made real strides in measuring audiences, attribution, even sponsorship exposures, but too much of the ecosystem still operates through disconnected, channel-specific tools and dissimilar metrics. Comparisons are difficult and decision-making lacks a north star direction.

That problem is becoming more urgent as the sports marketplace grows with rights investments and distribution complexity. Value is no longer concentrated in one screen, one asset class, or one type of media exposure. It is distributed across live broadcast, regional sports networks, streaming video, social content, TV highlights, news clips, in-venue signage, branded integrations, hospitality environments, and other non-traditional inventory. As the commercial sponsorships landscape expands, the measurement challenge is no longer simply whether an individual asset was in view and can be counted. It is whether all of those assets together can be evaluated within a common framework that empowers real commercial decisioning.

At Trajektory, we believe the market needs to move beyond isolated or partial sponsorship metrics and toward **unified sponsorship intelligence**. Only through addressing the broader need for comparability across a portfolio can teams, leagues, brands and agencies understand how sponsorships perform within and across environments.

Beyond traditional signage or standard media units, sports organizations are monetizing an increasingly wider range of assets. This newer inventory must be credibly measured if it is going to be valued and traded on. This all requires a centralized measurement layer capable of bringing consistency and comparability to a fragmented ecosystem.

The future of sports measurement is not about creating and connecting more siloed metrics. It is about trusted, transparent systems with standardized and common metrics that make the full sponsorship business easier to understand and value.

To this end, Trajektory is focused on delivering unified sponsorship intelligence so customers and partners can better evaluate investments and drive business growth.

References

- Ampere Analysis. (April 2025). *Trends and Dynamics in the Sports Broadcasting Sector — 2025 Edition*.
- Comscore. (2024). *State of Sports Media Report*.
- Crowd React Media. (2025). *The State of Sports Media 2025*.
- Designsensory. (2025). *The New Playbook of Sports Fandom*.
- EDO. (2025). *Advertising Engagement and Consumer Search Behavior in Sports*.
- G42 and The Future Laboratory. (2025). *The Future of Sport and AI 2025*.
- Houlihan Lokey. (Fall 2025). *Sports Market Update*.
- L.E.K. Consulting. (2025). *How Sports Fandom Is Evolving in 2025: Insights From L.E.K.'s Annual Sports Survey*.
- Lincoln International. (Q3 2025). *Sports Tech Industry Report*.
- Looper Insights. (2025). *The Sports Streaming Craze: Sustainable Growth or Overhyped Trend for 2025?*
- Mediaprobe. (2025). *Sports Emotion Tracker: Measuring Emotional Engagement in Sports Broadcasts*.
- Nielsen. (2025). *Holistic Sports Measurement: Leveraging Attention and Impact to Inform Optimization*.
- Nielsen. (December 2025). *Tops of Sports: Media Trends Shaping Sports Marketing for 2026*.
- Relo Metrics and VideoAmp. (2025). *Total Sports Performance: Unified Measurement of Ads, Sponsorship and Outcomes*.
- S&P Global. (2025). *Sports Media Rights Forecast*.
- TVision. (2025). *Audience Engagement in the Streaming Live Sports Era*.
- Yahoo Finance. (2025). *Global Sports Streaming Platform Market Forecast*.

A decorative graphic consisting of two concentric circles and a small dot, all in a lighter shade of purple than the background. The dot is positioned at the top-left of the inner circle.

cimm

Coalition for Innovative
Media Measurement

