

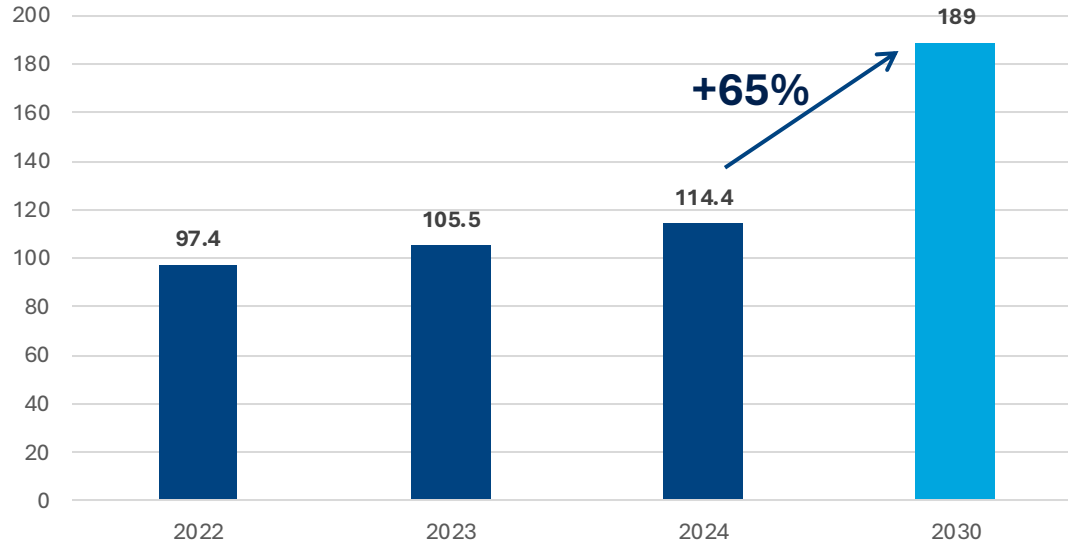
Brand Impact

Competitive landscape

April 2025

Global sports sponsorship market is valued at \$114B in 2024

Projected to reach \$190B by 2030



Sources:

Research & Markets [1](#), [2](#) Statista [3](#), [4](#)

World Federation of Advertisers [5](#), [6](#)

PwC [7](#) Barker Brettell [8](#) StartUs Insights [9](#)

Key sponsorship investment growth drivers

More people watching sports, more often

With international tournaments and year-round schedules, sports are drawing larger global audiences, giving brands more chances to be seen and remembered.

Changes in how fans follow sports

Fans are now watching across TV, streaming platforms, and social media. This opens up new ways for sponsors to connect with them throughout the day.

Sponsorships do more than show a logo

Sponsorships are now a way for brands to support causes, tell real stories, and build trust.

The measurement tech market is growing fast in tandem with sponsorship spend as sports properties invest in data to prove value and keep sponsors.

- **\$114B in global sponsorship spending in 2024.** Brands demand accountability and ROI.
- Sports sponsorship measurement and valuation technology market is a market segment within the broader **sports analytics market, which is \$4B in size in 2024** [1,2,3] with **26% CAGR** [4,5]
- Nearly **50% of sponsors use 3rd-party vendors** to measure performance.[5]
- Sponsors want more than media value — they want **proof of business impact** (or visibility for the management). [6]
- Brands that try to measure sponsorship's impact often use inaccurate data or models, resulting in a **68% potential error in ROI calculations**.[7]
- The most competitive solutions **combine multiple technologies** to provide comprehensive, actionable insights.

Major players

#	Company Name	Revenue \$,mln	Employees	Founded	Country	Total Fundings
1	Horizon Media	1 000	2 300	1989	USA	N/A
2	Nielsen Sports	100	500	2004	USA	Purchased by equity investors in 2022
3	SponsorUnited	70.6	400	2018	USA	Series A \$35m, Spectrum Equity
4	KORE Software	39.6	150	2002	USA	Private Equity. Two Circle
5	YouGov Sport	27.3	155	2010	UK	\$413.2M (Global YouGov)
6	FanAI	9.0	11	2016	USA	\$8mln. Series A (\$12,3mln total)
7	Blinkfire Analytics	7.9	60	2013	USA/Spain	\$2.5M
8	Zoomph	7.5	50	2017	USA	\$1,8
9	Relo Metrics	5.0	45	2018	USA	Was seeking “ eight-figure ” Series B
10	Navigate	5.0	25	2006	USA	N/A
11	Horizm	3.5	35	2019	USA	\$3M Seed
12	SponsorPulse	1.8	15	2019	Canada	N/A
13	Turnstile	1.5	20	2017	UK	N/A

The sponsorship measurement market. Latest acquisitions and funding rounds.

- **Major M&A deals:**
 - KORE Software acquired Hookit (\$16m [Series C](#)) & SponServe (\$600k [seed](#)) [[1](#)]
 - Excel Sports acquired B6A. B6A had raised \$4 million before the acquisition in 2021 [[2](#),[3](#)]
 - Two Circles acquired KORE Software \$650 in 2024 [[4](#),[5](#)]
- **Big funding rounds:**
 - SponsorUnited: \$35M Series A in 2022 [[6](#)]
 - MVPindex: \$20M Series B in 2023 [[7](#)]

Standard (key) features of sponsorship analytics solutions

Feature	What it means
Logo detection (broadcast)	Automatically finding logos and brand exposures in sports videos (TV, streaming, replays)
Social Media Analysis	Tracking sponsored content and brand mentions across social platforms
Media Value Measurement	Calculating how much each exposure is worth in advertising dollars
Inventory Management	Keeping track of sponsorship assets, delivery status, and fulfillment
ROI / Effectiveness	Proving whether the sponsorship changed awareness, behavior, or sales

Emerging or less common features

Feature	What it means
Data integration capabilities	Integration with data platforms (e.g., Snowflake, APIs) to combine sponsorship data with sales, CRM, etc.
Real-time fan engagement analysis	Uses IoT, loyalty data, and fan behavior tracking for deeper engagement metrics
Predictive analytics	Forecasting future trends in fan behavior and sponsorship ROI using AI models
Competitor analysis frameworks	Mapping of brand partnerships across leagues and teams, benchmarking sponsor strategies
Clean room data collaboration	Privacy-compliant, secure sharing of audience and fan data with sponsors (data clean rooms)

Feature availability comparison table

#	Company Name	Revenue \$,mln	Employees	Logo Detection	Social Media Analysis	Media Value Measurement	Inventory Management	ROI / Effectiveness
1	Horizon Media	1 000	2 300	Part.	Yes	Yes	No	Yes
2	Nielsen Sports	100	500	Yes	Yes	Yes	No	Yes
3	SponsorUnited	70.6	400	Part.	Yes	Part.	No	No
4	KORE Software	39.6	150	Part.	Yes	Yes	Yes	Yes
5	YouGov Sport	27.3	155	Part.	Yes	Yes	No	Yes
6	FanAI	9.0	11	Part.	Yes	Yes	No	Yes
7	Blinkfire Analytics	7.9	60	Yes	Yes	Yes	Yes	Yes
8	Zoomph	7.5	50	No	Yes	Yes	No	Yes
9	Relo Metrics	5.0	45	Yes	Yes	Yes	No	Yes
10	Navigate	5.0	25	Yes	Yes	Yes	No	Yes
11	Horizm	3.5	35	No	Yes	Yes	Yes	Yes
12	SponsorPulse	1.8	15	No	No	Part.	No	Yes
13	Turnstile	1.5	20	No	No	Yes	No	Part.
14	Constructor Tech			Yes	No	Part.	No	No

Where to play and win? 1/3

There is no sense in playing **Social, Inventory, and ROI**. We lack expertise, requires development from scratch. Established leaders are in place.

Option 1. Advanced AI capabilities.

- Detection of branded items and objects (e.g. Nike sneakers, iPhone, etc.).
- Deep computer vision that tracks exact placement (e.g. logo on jersey, left wing of a car, etc.).
- Voice analytics for identifying spoken brand mentions (plus positive or negative context).
- Provide the ability to experiment with raw data access on **Constructor Platform**.

Where to play and win? 2/3

There are a number of "old-fashioned" agencies that **lack ML expertise and face competition from new players** while maintaining relations with clients. We can help them. (e.g Horizon Media).

Option 2. Technology partnership with the traditional agencies. Model licensing.

- Advisory ML models for the best placement of ads.
- Licensing our ML models (computer vision) to other companies.

Where to play and win? 3/3

Market leaders are focusing on the premier leagues in the most developed markets (USA, UK, Germany, Spain), better to avoid head-to-head competition with them.

Option 3. New and underserved markets

- Focus on streamers and content creators to provide tools to measure brand exposure (over 207 million content creators worldwide, with 162 million in the U.S [[1](#),[2](#)]).
- Focus on emerging countries with growing sponsorship ecosystems (e.g Brazil).
- Self-service portal for amateur and semi-professional leagues (could be college or high-school teams) and local rights-holders, also will drive **Platform** usage.

Competitors profiles

Horizon Media

A full-service media agency that helps brands plan, buy, and evaluate sponsorships and media activations across sports and entertainment.

Founded	1989, New York
CEO	Bill Koenigsberg
Employees	2300 website, 1k-5k Linkedin, 950 Crunchbase
Total fundings	N/A
Revenue	\$1B to \$10B Crunchbase

#	Company Name	Revenue \$,mln	Employees	Logo Detection	Social Media Analysis	Media Value Measurement	Inventory Management	ROI / Effectiveness
1	Horizon Media	1 000	2 300	Part. (outsourced or custom)	Yes (uses third-party tools)	Yes (via industry standard or custom estimates)	No	Yes – Delivers custom ROI analysis for clients (brand lift, sales impact)

Nielsen Sports

The industry leader in sponsorship exposure and media value measurement across TV, digital, and social platforms, built on the legacy of Repucom. The sports division is a global leader in sponsorship media valuation.

Founded	Originally Repucom, founded in 2004, was acquired by Nielsen in 2016. New York
Global Managing Director Nielsen Sports	Jon Stainer
Employees	~ 1 100 (Sports) (Comprised largely of media analysts, market researchers, and client services personnel.) 10k+ Global Nielsen LinkedIn Repucom had 1 400 employees in 2016
Total fundings	Taken over by equity investors in 2022
Revenue	Crunchbase \$10M to \$50M, Repucom had \$100M revenue in 2016

#	Company Name	Revenue \$,mln	Employees	Logo Detection	Social Media Analysis	Media Value Measurement	Inventory Management	ROI / Effectiveness
2	Nielsen Sports	100	500	Yes – Tracks TV/digital exposure via image detection (ex-Repucom tech) niensensports.com	Yes – Monitors digital & social sponsorships niensensports.com	Yes – Calculates media equivalencies (e.g. Q1 Media Value) nielsen.com	No (analysis-focused)	Yes – Offers sponsor ROI models and fan impact studies linkedin.com

SponsorUnited

A sponsorship intelligence platform that tracks brand partnerships and marketing activations across sports, entertainment, and media properties. SponsorUnited primarily offers a comprehensive sponsorship intelligence database (the “Bloomberg terminal of marketing partnerships”) rather than its own media valuation metrics.

Founded	2018, Stamford
CEO	Bob Lynch
Employees	Grows rapidly – from about 130 employees in 2022 to over 400 employees worldwide by late 2024 LinkedIn 200-500 employees. The workforce includes a large data/research team that scouts and catalogs sponsorships, sales and account managers and a technical team (product developers and engineers) to enhance its SaaS platform
Total fundings	Series A , \$35m, Spectrum Equity
Revenue	\$1M to \$10M Crunchbase , \$70–71 million Getlaka

#	Company Name	Revenue \$,mln	Employees	Logo Detection	Social Media Analysis	Media Value Measurement	Inventory Management	ROI / Effectiveness
3	SponsorUnited	70.6	400	Manual/Datab ase – Records TV visible sponsorships (no CV automation)	Yes – Logs all sponsored social posts & metrics in its database	Partial – Can display engagement stats; valuations mostly via partner integrations	No (catalogs market inventory, but not a management tool for a specific team's own inventory)	No (focus on benchmarking and scouting, not outcome measurement)

KORE Software

An enterprise sponsorship management platform that combines asset tracking, CRM, and social media analytics (via Hookit) for end-to-end sponsorship performance measurement.

Founded 2002, acquired by Two Circles 2024, New York

CEO Gareth Balch

Employees 257 [Growjo](#), 51-200 [LinkedIn](#). *Includes software engineers, product managers, data scientists (especially from Hookit and Sports Alliance acquisitions)*

Total fundings Private Equity

Revenue \$39.6 million [Growjo](#) . It has **1,000+ sports clients** globally (teams, leagues, brands) on [subscription](#).

#	Company Name	Revenue \$,mln	Employees	Logo Detection	Social Media Analysis	Media Value Measurement	Inventory Management	ROI / Effectiveness
4	KORE Software	39.6	150	Partial – Can integrate broadcast data (via partners)	Yes – Hookit's AI social tracking for teams, players koresoftware.com	Yes – Hookit Valuation Model (social media \$\$ value) hookit.com + KORE's own reporting	Yes – End-to-end sponsorship and asset management system koresoftware.com	Yes – Tracks fulfillment vs. goals, integrates survey or sales data in reports

YouGov Sport

A research-based sports insights firm that combines media exposure analysis with global fan survey data to assess sponsorship effectiveness

Founded	Founded as SMG Insight in 2010; rebranded after full acquisition in 2018. London
CEO	Frank Saez
Employees	Growjo 155, Linkedin 500-1k
Total fundings	\$413.2M (Global YouGov)
Revenue	Estimated \$27.3 million 2023, per industry analysts. This is part of parent YouGov £335M total revenue 2024. YouGov Sport’s revenue comes from sponsorship impact studies, media valuation reports, and data subscriptions for sports stakeholders.

#	Company Name	Revenue \$,mln	Employees	Logo Detection	Social Media Analysis	Media Value Measurement	Inventory Management	ROI / Effectiveness
5	YouGov Sport	27.3	155	Partial – Incorporates broadcast exposure data in reports	Yes – Analyzes social reach & engagement	Yes – Media value integrated with survey insights (custom reports)	No	Yes – Emphasis on brand lift, consumer impact metrics

FanAI

A data platform that connects sponsorship exposure with actual consumer purchase behavior to measure the financial ROI of brand partnerships.

Founded	2016. Headquarters in California
CEO	Michael Akindele
Employees	11 Growjo , down from ~15 in 2022. (<i>Roles</i> : data engineers, data scientists, and partnership managers.) 11-50 Linkedin
Total fundings	\$8mIn. Series A (\$12,3mIn total)
Revenue	~\$924,000 Growjo \$1-10mIn Crunchbase

#	Company Name	Revenue \$,mIn	Employees	Logo Detection	Social Media Analysis	Media Value Measurement	Inventory Management	ROI / Effectiveness
6	FanAI	9.0	11	Partial – Handles digital streaming; broadcast via partners	Yes (via MVPIndex's tracking of posts, streams)	Yes – Media value of social/streaming content (from MVPIndex)	No	Yes – Ties exposure to consumer purchase data to quantify sales driven (core value)

Blinkfire Analytics

An AI-powered platform that uses computer vision to track brand exposure across social media, digital content, and broadcasts in real time.

Founded	2013, Chicago (Second office is in Valencia)
CEO	Steve Olechowski
Employees	63 Growjo , 51-200 LinkedIn
Total fundings	\$2.5M
Revenue	Crunchbase \$1M to \$10M. Growth 51% from 2021 (\$4.3M) to 2022 (\$6.5M), then ~8% to ~\$7.0M in 2023

#	Company Name	Revenue \$,mln	Employees	Logo Detection	Social Media Analysis	Media Value Measurement	Inventory Management	ROI / Effectiveness
7	Blinkfire Analytics	7.9	60	Yes – AI logo recognition for OTT/streaming and highlight videos blinkfire.co.uk	Yes – Real-time tracking across major social platforms blinkfire.co.uk blinkfire.co.uk	Yes – Media value for each post/clip via proprietary BrandSpotter CV engine blinkfire.co.uk	Yes – Digital inventory module for social & web assets blinkfire.co.uk	Yes – On-platform dashboards show value delivered to sponsors in real time (engagement & \$)

Zoomph

A social media analytics tool that tracks fan engagement, audience demographics, and sponsorship impact across digital channels.

Founded 2016. Reston, Virginia

CEO Ali Manouchehri

Employees [LinkedIn](#) 11-50, [Leadiq](#) 51

Total fundings \$1,8 [Crunchbase](#)

Revenue \$7.5m [Leadiq](#), \$1M to \$10M [Crunchbase](#)

#	Company Name	Revenue \$,mln	Employees	Logo Detection	Social Media Analysis	Media Value Measurement	Inventory Management	ROI / Effectiveness
8	Zoomph	7.5	50	No	Yes – Tracks social posts, fan interactions, and audience demographics	Yes – Calculates social media value and ROI for posts/campaigns	No	Yes – Focus on audience quality and engagement to assess sponsorship success (brand-centric metrics)

Relo Metrics

An AI-based sponsorship analytics platform that measures brand visibility across live broadcasts, streaming, and social media using computer vision.

Founded Founded as GumGum Sports in 2018; rebranded in 2021. Santa Monica, California

CEO Jay Prasad

Employees [Linkedin](#) 11-50, [Axios](#) 42, [Company blog](#) 42

Total fundings The company was seeking an “[eight-figure](#)” Series B raise in late 2023 to fuel growth

Revenue [Not profitable](#) 2023, [Axios](#) \$5mln

#	Company Name	Revenue \$,mln	Employees	Logo Detection	Social Media Analysis	Media Value Measurement	Inventory Management	ROI / Effectiveness
9	Relo Metrics	5.0	45	Yes – AI logo tracking on live broadcasts & streams press.relometrics.com mpress.relometrics.com	Yes – Measures social content exposures (with integrations for engagement data) relometrics.com	Yes – Media Value Center (now Relo Edge) provides \$ value for every exposure press.relometrics.com ress.relometrics.com	No	Yes – Comprehensive reports on sponsorship performance, used for optimizing content and demonstrating value to sponsors relometrics.com relometrics.com

Navigate

A consultancy that provides custom sponsorship valuation, fan research, and ROI modeling for sports teams, leagues, and sponsors.

Founded	2006, Chicago
CEO	AJ Maestas
Employees	Linkedin 11-50, Sportbussinessjournal 21
Total fundings	N/A
Revenue	Crunchbase \$1-\$10m.

#	Company Name	Revenue \$,mln	Employees	Logo Detection	Social Media Analysis	Media Value Measurement	Inventory Management	ROI / Effectiveness
10	Navigate	5.0	25	Yes (via project data)	Yes (via project data)	Yes – Custom valuations for all assets in a sponsorship	No (advisory on inventory strategy only)	Yes – Delivers full ROI and impact analysis as a service

Horizm

A digital asset monetization platform that values and manages social media sponsorship inventory in real time for sports rights-holders.

Founded 2019, New York

CEO Pedro Mestriner

Employees [LinkedIn](#) 11-50, [PitchBook](#) 32

Total fundings \$3M Seed (2021)

Revenue [Crunchbase](#) \$1-\$10m.

#	Company Name	Revenue \$,mln	Employees	Logo Detection	Social Media Analysis	Media Value Measurement	Inventory Management	ROI / Effectiveness
11	Horizm	3.5	35	No (no TV)	Yes – Integrates with teams' social and digital channels (AI identifies content & sponsors)	Yes – Assigns dollar value to each digital content piece (real-time rate card)	Yes – Digital inventory marketplace showing available & sold assets	Yes – Reports the value delivered to sponsors and revenue generated, helping optimize digital sponsorship strategy

SponsorPulse

A consumer insights platform that measures sponsorship effectiveness and fair market value through large-scale global fan survey data.

Founded 2019, Toronto

CEO Adam Wright

Employees [LinkedIn](#) 11-50 [Crunchbase](#) 11-50, [LeadIQ](#) 12

Total fundings N/A

Revenue [Crunchbase](#) \$1-\$10m. [LeadIQ](#) \$1,8

#	Company Name	Revenue \$,mln	Employees	Logo Detection	Social Media Analysis	Media Value Measurement	Inventory Management	ROI / Effectiveness
12	SponsorPulse	1.8	15	No	No	Partial – Provides fair market value guidance via consumer data (not exposure-based) sponsorpulse.com	No	Yes – Measures consumer interest, intent & brand health to gauge sponsorship impact sponsorpulse.com

Turnstile

A sponsorship valuation company that calculates the fair market value of brand partnerships using exposure data and proprietary pricing models. Turnstile is part of Tenka Group, an Australian sports intelligence firm.

Founded	2017, London
CEO	Rob Mills
Employees	LinkedIn 11-50, Tenka Group 51-100
Total fundings	N/A
Revenue	Crunchbase \$1-\$10m

#	Company Name	Revenue \$,mln	Employees	Logo Detection	Social Media Analysis	Media Value Measurement	Inventory Management	ROI / Effectiveness
13	Turnstile	1.5	20	No – Relies on partners for exposure data; focuses on valuation methodology	No (not a social tracking tool)	Yes – Fair market value pricing model for sponsorshipstumstilegroup.com	No	Partial – Provides fair value to compare against outcomes (valuation used as proxy for ROI)



Thank you!