

nielsen

AN UNCOMMON SENSE
OF THE CONSUMER™



YEAR IN SPORTS MEDIA REPORT

2014





STEPHEN MASTER, SVP
SPORTS, NIELSEN

Welcome to Nielsen's State of the Media: 2014 Year in Sports Media Report, a compilation of media highlights, advertiser trends and consumer insights across leading sports properties. With the Sochi Winter Olympics kicking off the year and one of the most exciting World Cups ever held in Brazil this summer, 2014 offered fans across the world plenty of indelible memories. These big events and the ubiquity of mobile apps and devices throughout the world made 2014 the year sports consumption on mobile truly went mainstream. The growth in digital video viewing from 2013 to 2014 was nothing short of extraordinary, and not just among younger consumers. While the 18-34 set posted a 53% increase in digital viewing from Q2 2013 to Q2 2014, viewing grew an even more impressive 80% and 60% among Americans 35-49 and 50 – 64, respectively. Fans continue to increase consumption and engage with sports content in a variety of different ways across a multitude of devices.

In turn, Nielsen's "FANALYTICS" platform is evolving alongside the rapidly changing media consumption landscape, as we continually introduce new solutions to help our industry understand the total audience.

As you'll see inside these pages, sports fans' passion for their favorite athletes and teams continues to grow, as fans tuned-in to TV, computers, tablets and mobile screens to follow them.

Some of the highlights that transpired in 2014 include:

- An average of over 112 million viewers tuned in to the first Super Bowl played outdoors in a northern climate making it the most watched event in TV history. While the NY weather was warmer than usual, the Seahawks D never allowed Peyton Manning to heat up in their romp over the Broncos.

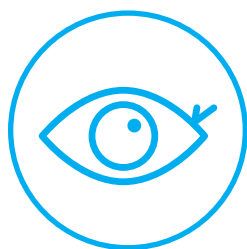
- Winter Olympic fans were treated to an astounding 1,539 hours of content across various NBC platforms, almost double the number of hours of Olympic action they had access to at the 2010 Games in Vancouver.
- The success of the US and Mexico teams and favorable Brazil time zones resulted in a record number of Americans following the World Cup this summer. 119 million Americans tuned into World Cup action on TV across ABC, ESPN, ESPN2, Univision, Unimás, UDN and Galavision.
- The Spurs avenged last year's heartbreaking loss against the Heat by winning the NBA title. 18 million viewers watched the Spurs' clinching game, in what turned out to be King James' last game in a Heat uniform before he took his talents back home to Cleveland. LeBron's marketability as an endorser has grown stronger than ever since then; Nielsen Talent Analytics shows his N-Score at an impressive 91, the highest of any current athlete.
- NASCAR crowned Kevin Harvick as a new first-time Sprint Cup champion. However, the real champion this year was the new Chase format. The high-stakes unpredictability generated a strong amount of social media buzz and drove ratings at high speed. The final race in Homestead drew 5.2 million viewers, the most in the last 3 years.
- The Giants took home their third World Series title in 5 years in a thrilling seven game series over the Royals. But one of the biggest stories in baseball this season was the farewell tour of Yankee legend, Derek Jeter. Per Nielsen Talent Analytics, more than 83% of Americans know of Jeter, making him by far the most recognizable player in MLB.
- College football waved goodbye to the BCS and entered a new era in 2014 with the first College Football Playoff. It's safe to say that fans thought the new playoff format was a touchdown—the two semi-final games played on New Year's Day and the final game played on January 12, 2015 were the three most watched programs in cable television history.

I hope you enjoy these highlights from across Nielsen's wealth of consumer and media insights. 2014 continued to prove that sports content, across all media platforms, is among the most popular and engaging genres, and is well-positioned to thrive in an increasingly fragmented media marketplace and rapidly evolving multi-screen world.

Sincerely,



Stephen Master






THE YEAR OF DIGITAL VIEWING

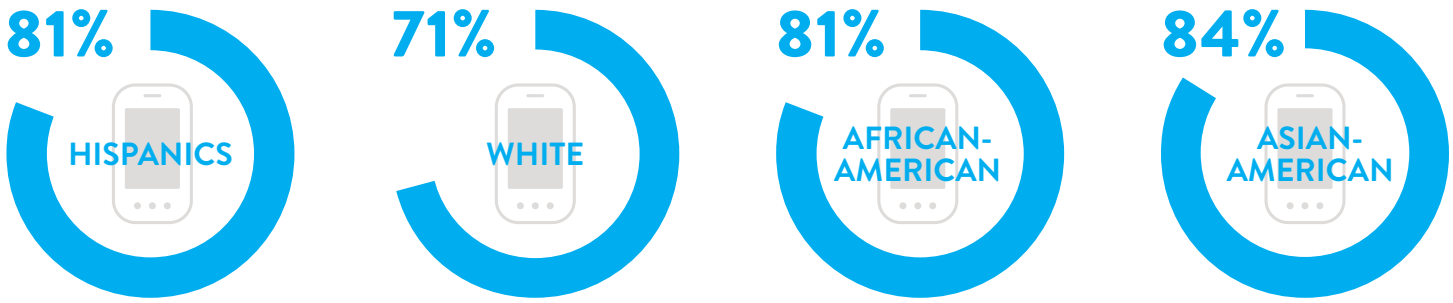
Media content is no longer synonymous with TV. With the rise of technology, media can be consumed across a variety of devices, anytime, anywhere—at work, while commuting, outside—with just a few screen taps of one’s fingertips. Never before has it been so easy to tune in in so many different ways. Sports fans, ever hungry for new content, have wholly embraced this newfound on-the-go convenience.

THE RISE OF TECHNOLOGY

In 2008, smartphones were a nascent technology, with only 10% penetration. By the end of 2010, however, that jumped to 30%, and crossed 50% in Q2 12. Today, it sits at a staggering 75%, complemented by the rapid emergence of smart TVs and tablets.

	2010 Q4	2011 Q4	2012 Q4	2013 Q4	2014 Q3
 SMARTPHONE	30%	46%	60%	66%	75%
 SMART TV	N/A	2% (Q1 2012)	4%	8%	13%
 TABLETS	N/A	10% (Q1 2012)	19%	29%	46%
 BROADBAND ACCESS	73%	76%	76%	77%	78%

Smartphone penetration is especially high among Asian-Americans, who are 12% more likely to own smartphones compared to the average US consumer. Hispanics and African-Americans are both 8% more likely.



SMARTPHONES AND THE SPORTS FAN

The on-the-go convenience of a smartphone is a perfect fit for the dynamic, fast-paced world of sports. A collective 72.3 million Americans consumed a staggering 7.1 billion minutes of sports content in October 2014 alone, and those numbers will only continue to grow. From October 2012 to 2014, the average user increased their monthly time spent on mobile sports content by 35%.



AUDIENCE



AVERAGE MINUTES SPENT



TOP APPS BY TOTAL MINUTES

Month	Audience	Average Minutes Spent
OCT '12	50.9 million	73
OCT '13	61 million	83
OCT '14	72.3 million	99
% INCREASE FROM '12 TO '14	42%	35.6%

- 1 ESPN Sports Center
- 2 MLB At Bat
- 3 Team Stream
- 4 NFLMobile
- 5 Yahoo! Fantasy Sports – Fantasy Football

AVERAGE NUMBER OF SPORTS APPS PER PERSON

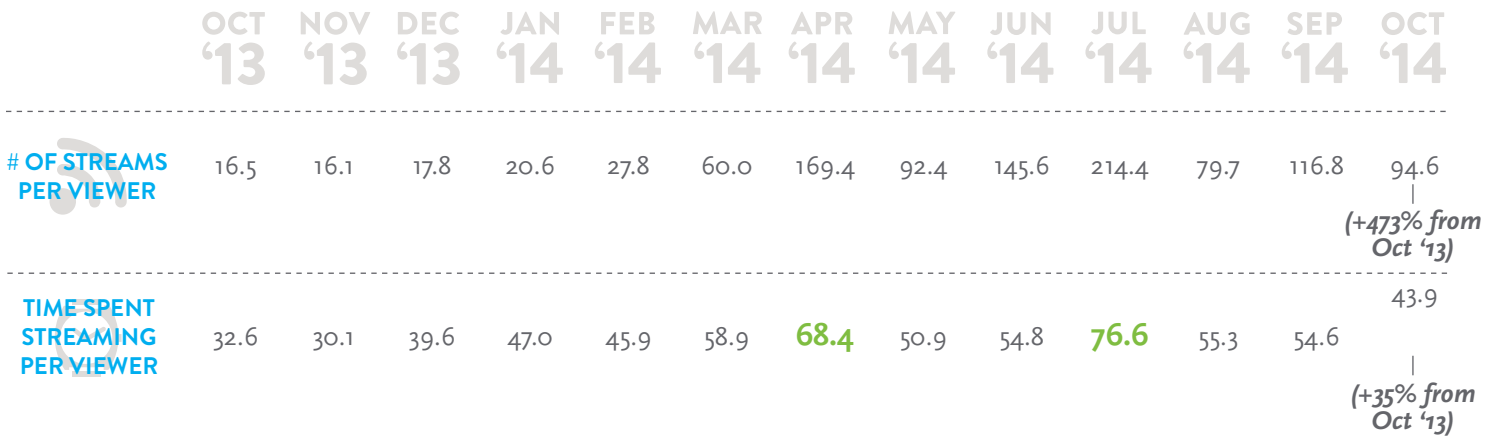


AUG '13	1.81
AUG '14	1.82



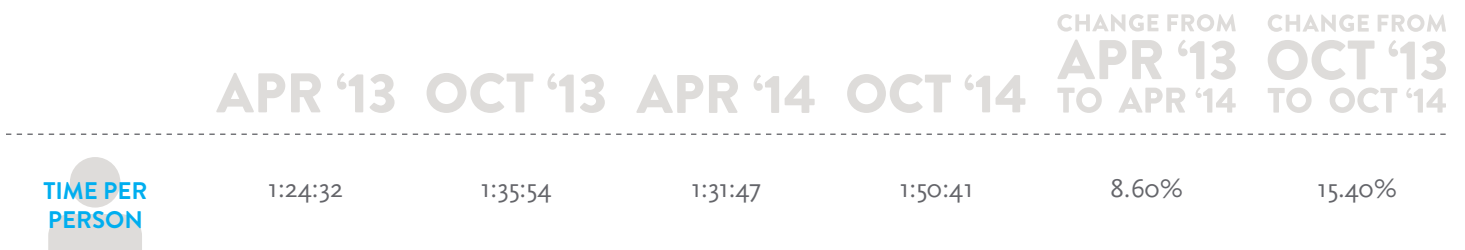
STREAMING AND THE SPORTS FAN

Americans streaming video on the computer particularly in the sports category continues to explode as the total time the average person spent streaming and the number of streams they viewed continued to increase through the year. Time spent streaming peaked in April and in July, corresponding to the NBA Playoffs, March Madness and the World Cup.



THE COMPUTER IS GIVING WAY TO MOBILE IN SPORTS

Similar to streaming on a computer, the total number of Americans who visit websites on their computer is dipping in favor of mobile, and sports fans are no different. However, despite this decrease, sports fans who do still visit sports websites are spending more time online than ever.



WHO'S LISTENING ON RADIO?

Fans' insatiable appetite for sports spans all forms of media, including radio. Sports radio attracts 23 million weekly listeners, who tune in for an average of 4 hours a week! Contrary to what one might expect, a full 29% of that listening occurs at home. Compared to the U.S. population, sports radio listeners trend highly educated and wealthy. Over 50% earn more than \$75,000 a year, and 46% have a college degree.



SMARTPHONES ARE BECOMING AS ESSENTIAL TO FANTASY FOOTBALL AS DRAFTING A GOOD QB

Although traditional fantasy leagues on ESPN and Yahoo are as popular as ever, daily fantasy football sites are an emerging category and have seen tremendous growth over the last year. Between just DraftKings and FanDuel, the number of unique users has shot up more than 800% on mobile alone!

DAILY FANTASY FOOTBALL

UNIQUE AUDIENCE '13 UNIQUE AUDIENCE '14 YOY GROWTH



877,000

5,129,000

+485%



319,000

3,022,000

+847%

Note: Audience numbers represent the unduplicated audience for DraftKings and FanDuel only. Mobile numbers include web content and app usage.

AVID SPORTS FANS ARE SUPER CONSUMERS OF SPORTS

Over 70 million people consumed sports content on either their smartphones or computer, and of that, the top 20% consumed eighty-five percent of the total sports minutes viewed in Q3 2014, and over 8 times as many minutes as the second heaviest quintile! And their appetite for sports is seemingly insatiable, as their time spent on sports continues to rise year over year.

COMPOSITE VIEWING (MOBILE)

COMPOSITE VIEWING (ONLINE)

QUINTILE 1 QUINTILE 2
TIME SPENT TIME SPENT

QUINTILE 1 QUINTILE 2
TIME SPENT TIME SPENT



5:37

0:43



21:48

02:34



6:10

0:45



25:03

02:50



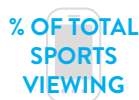
+9.6%

+5.8%



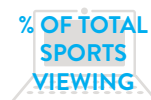
+14.9%

+10.3%



85%

8%



85%

10%

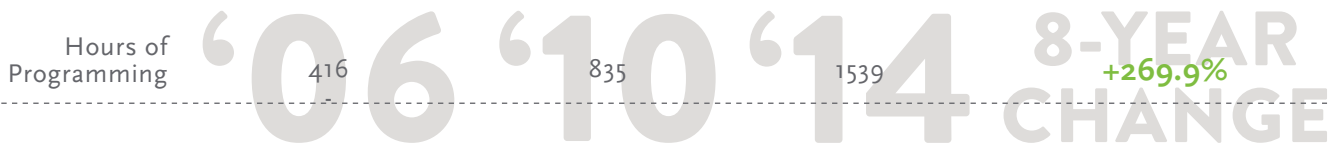


WINTER OLYMPICS

Regardless of the season, the Olympics is by far one of Americans' favorite sporting events, and 2014 showed Americans can't get enough of it. This year, NBC offered an unprecedented amount of coverage of the Winter Olympics—1,500+ hours across online, mobile apps, and television. Across all NBCUniversal platforms, the Sochi Games garnered 242.3 million media exposures, 3.5 million more than the 2010 Vancouver Winter Olympic Games. Engagement with the games was most palpable after T.J. Oshie handed the U.S. a hard-fought win against Russia with an unprecedented 4 shoot out goals. The thrilling win set Twitter alight—over 18,000 tweets sent in one minute! In the days following his epic performance, Oshie's Twitter followers almost doubled.



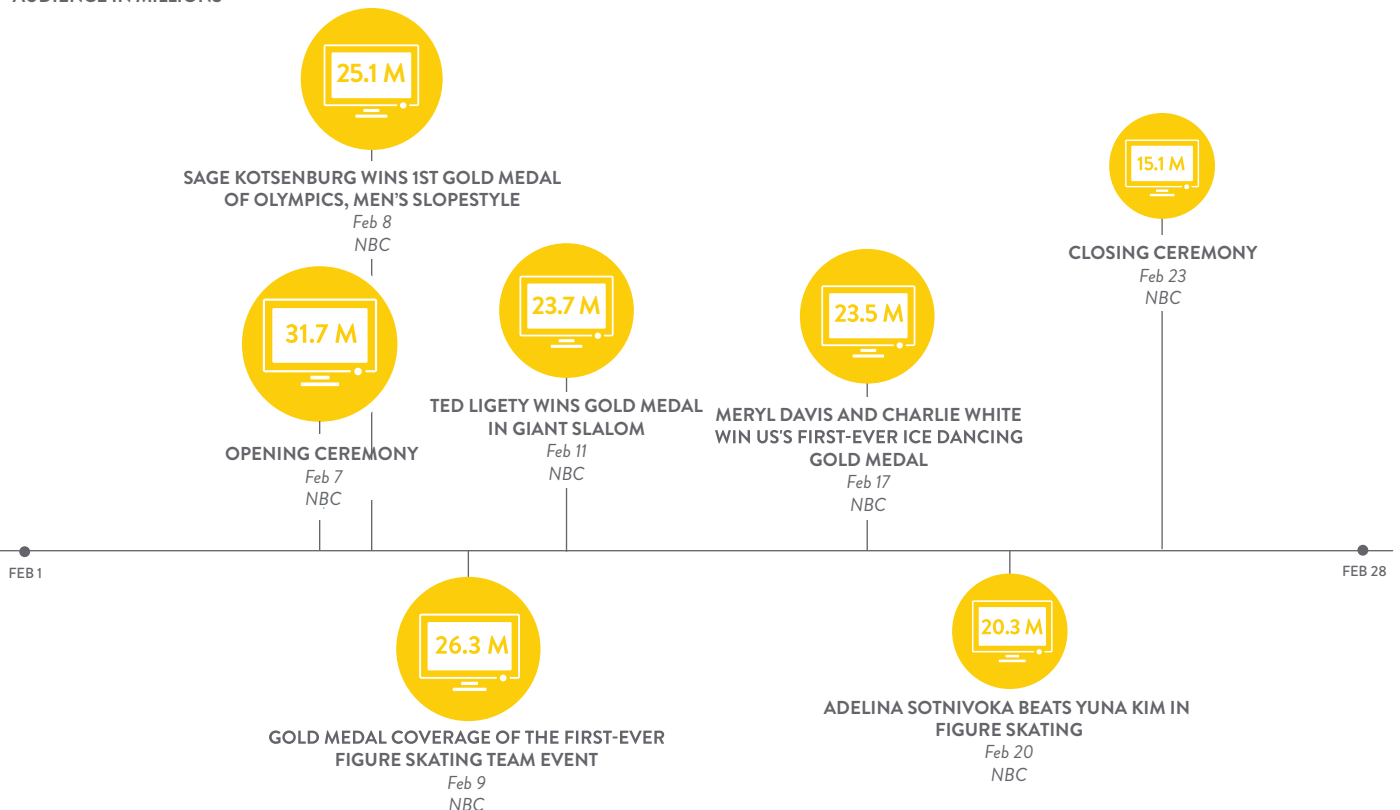
TOTAL CROSS-PLATFORM HOURS OF PROGRAMMING



TIMELINE OF OLYMPICS AVERAGE TV VIEWERSHIP TIMELINE FOR 2014



AUDIENCE IN MILLIONS

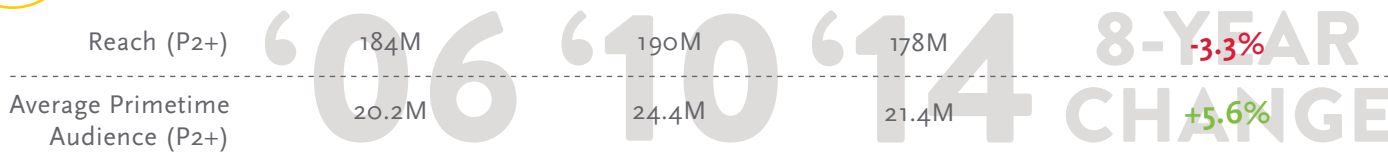


THE OLYMPICS ON TV

From start to end, the Olympics commanded Americans' attention on TV, for all 18 nights, it ranked as the No. 1 show of primetime. Overall, the games averaged 21.4 million viewers during primetime, an increase of 5.6% from Torino, the last European Winter Games.



REACH AND AVERAGE AUDIENCE



THE OLYMPICS ON DIGITAL PLATFORMS

In the age of smartphones and the Internet, viewers consume media however and whenever they want, wherever they go, and Sochi demonstrated this growing cross-platform trend more than ever. Per Adobe Analytics, total hours watched on NBC's digital platforms more than tripled from Vancouver. Unique viewers grew from 17 million to 62 million.



REACH AND UNIQUE AUDIENCE



A Nielsen study of five national ad campaigns that ran heavily across platforms showed that much of this digital growth was driven by the younger generation. Millennials made up 44 percent of the mobile audience for these five campaigns, compared to just 18 percent of the TV audience.



% OF AUDIENCE BETWEEN AGES 18-34

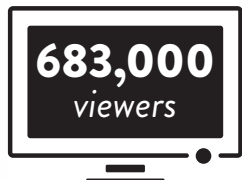


HOCKEY'S STREAMING HAT TRICK

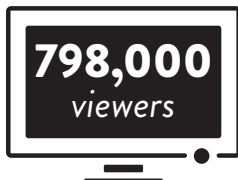
Prior to Sochi, the most streamed Olympic event was the 2012 London Games' U.S.-Japan women's soccer final, with 683,000 unique viewers. Thanks to hockey, Sochi smashed this record not just one, but three times over 3 consecutive days!



PRIOR RECORD
U.S. Japan women's soccer final 2012 London



MEN'S QUARTERFINAL
U.S. - Czech Feb 19



WOMEN'S SEMIFINAL
U.S. - Canada Feb 20



MEN'S HOCKEY SEMIFINAL
U.S. - Canada Feb 21

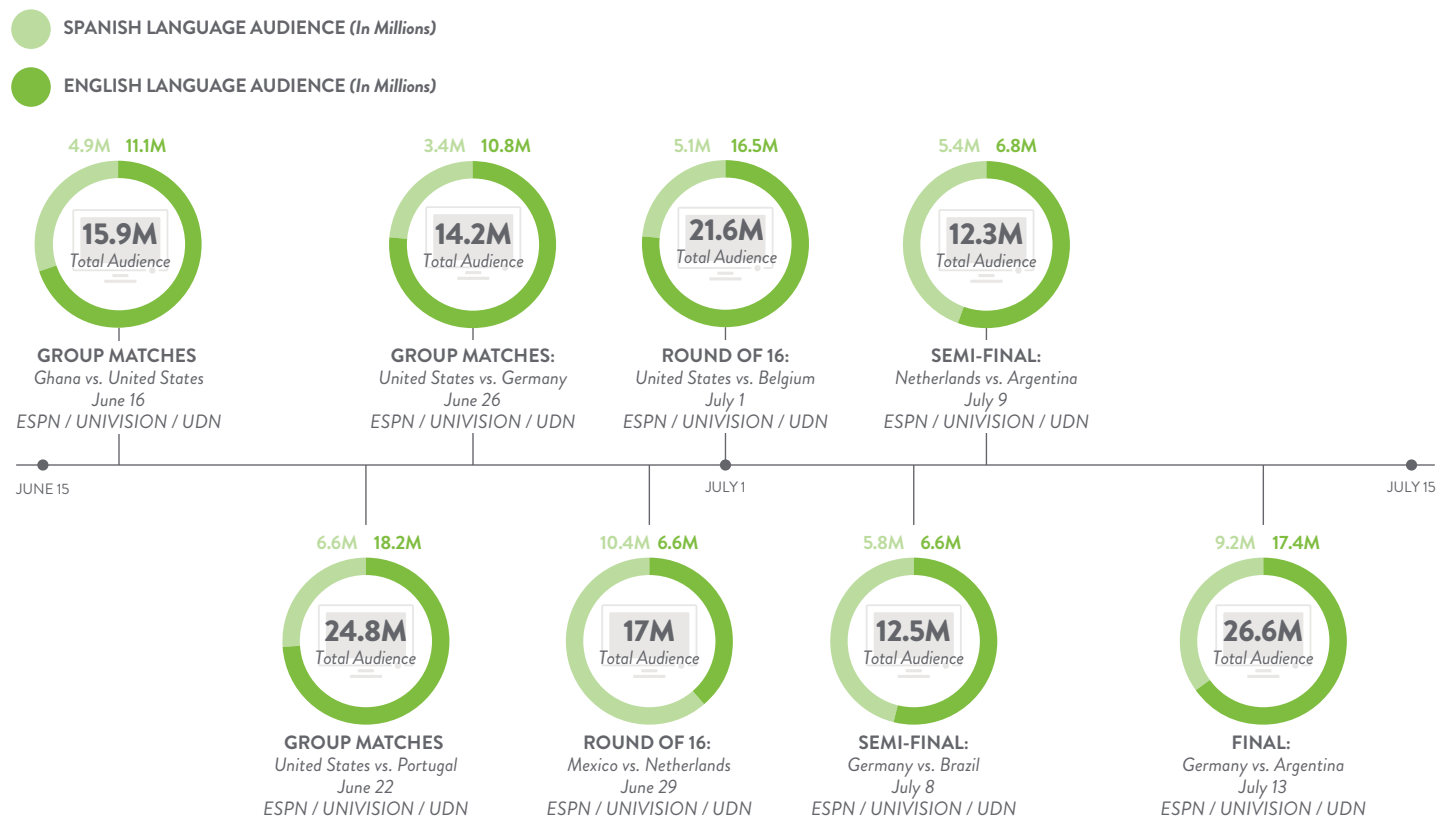


WORLD CUP

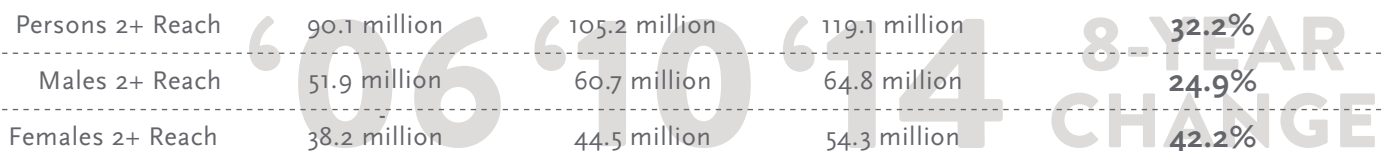
Soccer—or football, as the rest of the world knows it—is easily the world’s most popular sport, and as such, the World Cup is one of the most internationally anticipated sports events. If this year is any indication, Americans are (finally) starting to get in on the World Cup craze. From June 12th to July 13th a record 119 million Americans, or 40.4% of the US population, watched at least six minutes of the World Cup this year—an increase of 32.2% from 2006, much of which was driven by women.

The semi-final match-up of Germany and Brazil was the third most tweeted sporting event in the US after the Super Bowl and NBA Finals.

TIMELINE OF TOURNAMENT HIGHLIGHTS



TOTAL REACH



THE WORLD CUP ON TV

While some of the World Cup's growing popularity is due in part to the burgeoning Hispanic population, much of the growth in reach is also coming from non-Hispanics of all races.







TOTAL REACH

	2006	2010	2014	% Change
Non-Hispanic White	50.2 million	57.2 million	65.4 million	30.3%
Hispanic	25.1 million	30.4 million	34.4 million	36.9%
Non-Hispanic Black	8 million	9.8 million	10.3 million	29.5%
Non-Hispanic Asian	*Asian households were not measured in 2006	6.2 million	7.8 million	24.2% ('10-'14 growth)

ENGAGEMENT OF HISPANIC VS. NON-HISPANIC VIEWER

Although a record number of non-Hispanics tuned into this World Cup, Hispanics still remained the most engaged viewers. Hispanic women, for instance, watched even more than non-Hispanic males! The Hispanic audience trended much more gender equal and much younger. Among Hispanics viewers, 46% were under age 35, and 42% were women; by comparison, among non-Hispanic viewers, 39% were under 35 and 34% were women.

AVERAGE MINUTES WATCHED

 Hispanic Male	1,048
 Non-Hispanic Male	502
 Hispanic Female	814
 Non-Hispanic Female	320

TOP 5 ADVERTISERS

- 1 Microsoft
 - 2 McDonald's
 - 3 Adidas
 - 4 Anheuser-Busch
 - 5 Hyundai
 - 6 T-Mobile
 - 7 Kia
 - 8 Coca-Cola
 - 9 PepsiCo
 - 10 Verizon
- English ■ Spanish

THE WORLD CUP ON OTHER PLATFORMS



MOBILE AND STREAMING ON UNIVISION

	2014 WORLD CUP	GROWTH FROM 2010
World Cup live streams	73M	+316%
Hours spent streaming matches	29M	+187%
Unique live stream viewers	10M	+241%
Unique visitors to the Copa Mundial site and app section	28M	N/A
Deportes app downloads during World Cup	3.5M	+295% compared to full year 2013



MOBILE AND STREAMING ON WATCHESPN

	2014 WORLD CUP	GROWTH FROM 2010
Unique Devices streamed content	15 M	N/A
Average Unique viewers per live game	892,000	+174%
Average Total Minutes per live game	41 M	+173%
Hours spent streaming live games	43.6 M	+224%



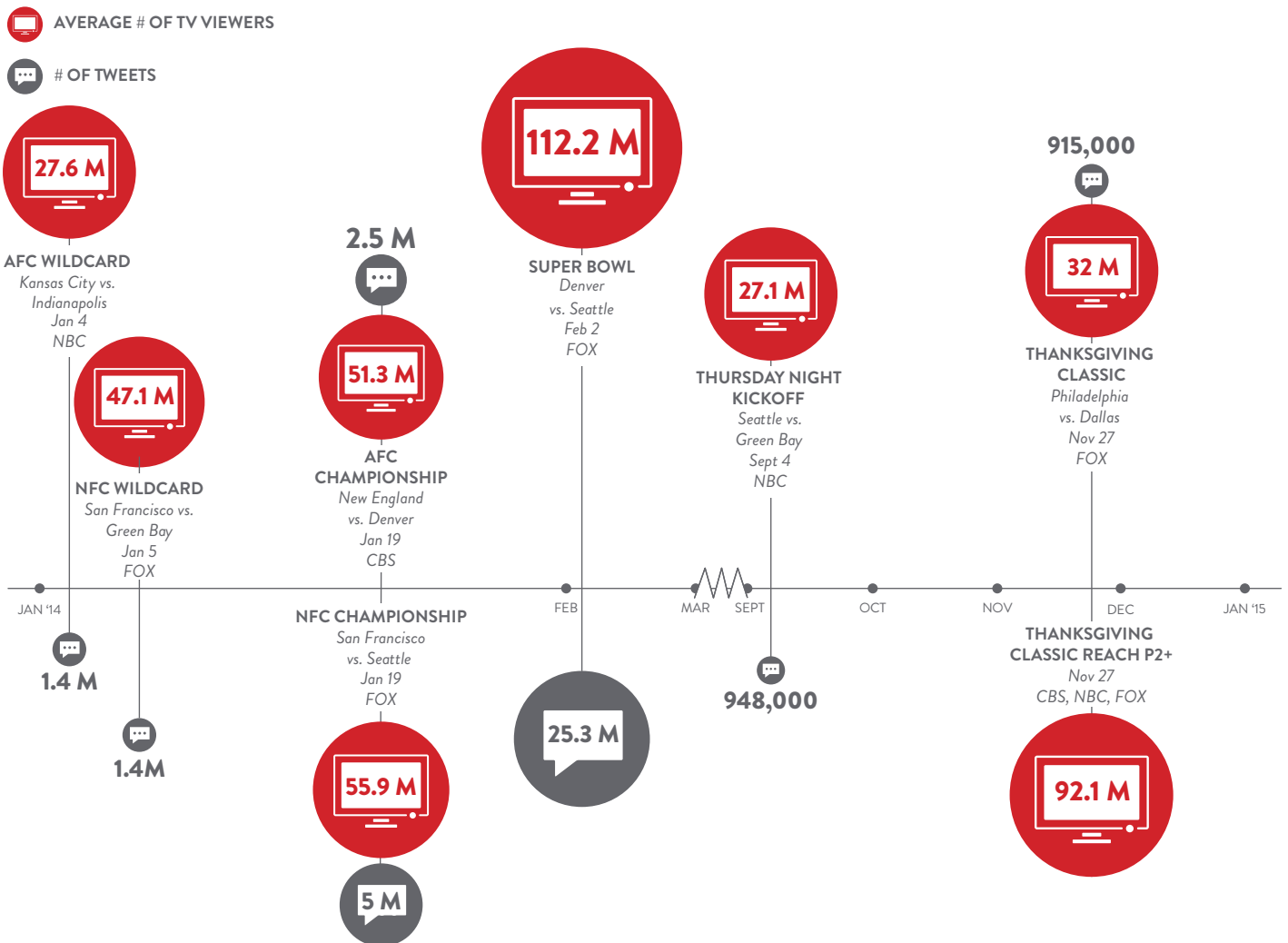
NFL

NATIONAL FOOTBALL LEAGUE

Despite a lot of early season challenges related to off-the-field incidents, viewership in 2014 remained steady particularly among female fans. The resurgence of America's Team, the Dallas Cowboys, helped drive huge audiences whenever they were featured nationally. Locally, the team's ratings were up almost 10% from 2013.

Russell Wilson not only helped lead the Seahawks to their first Super Bowl title, he has emerged as a rising superstar from a marketing perspective. According to Nielsen Talent Analytics, although his N-Score still trails Tom Brady, Aaron Rodgers and Peyton Manning due to his lower level of awareness, Wilson's likability is off the charts and is the highest among all active NFL quarterbacks.

TIMELINE OF SEASON HIGHLIGHTS



People in the U.S. who Tweet about NFL games are 22% more likely to Tweet about the Pharmaceutical brands than they are to Tweet about brands in general. (9/5/2013 – 12/29/2013)

WILL KATY PERRY SCORE A TOUCHDOWN AT THE 2015 SUPER BOWL?

The Super Bowl isn't just a sporting event—it's a pop culture event as well, with the half-time performance as eagerly anticipated as the game itself. But does the honor of performing translate to better sales? It's been hot, then cold, yes and then no for artists over the years. Beyonce and Bruno Mars saw their most recent album sales skyrocket, but the Who, in their prime a generation ago, did not.

	Artist	Album	Preceding Month Sales	Post-Month Sales	% Change
'14	Bruno Mars	"Unorthodox Jukebox"	77,000	171,000	123.0%
'13	Beyonce	"4"	9,000	25,000	195.7%
	Destiny's Child	"Destiny Fulfilled"	1,000	4,000	160.7%
'12	Madonna	"Hard Candy"	488	550	12.7%
'11	The Black Eyed Peas	"The Beginning"	65,000	78,000	20.1%
'10	The Who	"Endless Wire"	339	270	-20.4%
'09	Bruce Springsteen	"Working On A Dream"	224,000	102,000	-54.6%
'08	Tom Petty & The Heartbreakers	"Highway Companion"	2,000	5,000	110.3%
'03	Janet Jackson	"All For You"	3,000	6,000	127.6%

Note: "Working on a Dream" was released on January 27th, 2009. Therefore, sales numbers reflect the preceding and following week of the Super Bowl.

LOCAL MARKET INSIGHTS:

- Fueled in part by their Super Bowl run in the 2013 season, the Seattle Seahawks' fan following in the Seattle market is 71%, increasing by 27% since last year. That's the largest growth for any local market NFL fan base in ten years.
- Since 2000, twelve professional sports franchises have cracked 75% or more of their home local market. Eight of those twelve franchises play in the National Football League. In the most recent wave of Scarborough data, twenty-four out of 32 NFL franchises (75%) garner at least 50% of their home local market as fans. In comparison, only 14 out of 29 (48%) MLB franchises, 4 out of 23 (17%) NHL franchises, and 3 out of 29 (10%) NBA franchises based in the US can claim 50% of their home local market as fans.



TOP NFL ADVERTISERS

- 1 Bud Light
- 2 Chevy Silverado
- 3 Verizon Wireless
- 4 McDonald's
- 5 State Farm Insurance

FAN INSIGHTS

Compared to the average US adult, avid NFL fans are:

27% more likely to have spent more than \$100 on fine jewelry in the past 12 months

47% more likely to have drunk beer in the past 7 days

17% more likely to plan on buying furniture in the next 12 months



NATIONAL BASKETBALL ASSOCIATION

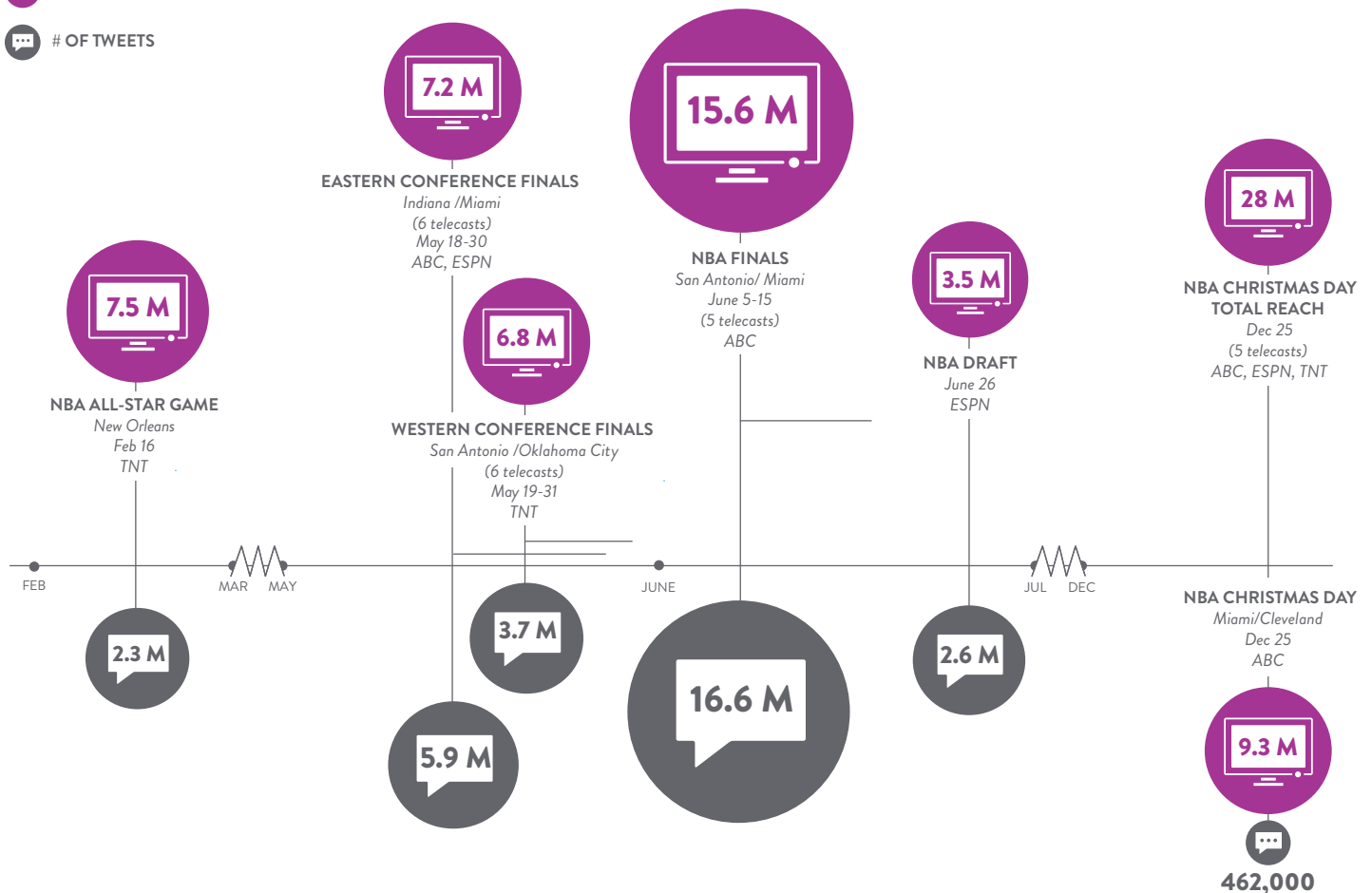
After a record-long set of playoff games, Miami Heat and the San Antonio Spurs emerged victorious from their respective conferences for a rematch at the Finals. Having lost to Miami last year, the Spurs more than avenged themselves. Their win in the final game garnered 18 million viewers, roughly 11% more than last year's fifth game.

LeBron James's second "Decision"—albeit this time not televised—to leave Miami Heat for the Cleveland Cavaliers made major headlines in July. Cleveland viewers were happy to welcome their prodigal son back, with local ratings up over 140% through December compared to 2013. The two teams' first highly-anticipated match-up achieved a 15.2 and 17.2 rating in Cleveland and Miami, respectively.

TIMELINE OF SEASON HIGHLIGHTS

AVERAGE # OF TV VIEWERS

OF TWEETS



People in the U.S. who Tweet about NBA games are 23% more likely to Tweet about the Wireless Networks category than they are to Tweet about brands in general. (10/29/2013 – 4/16/2014)

THE NBA's MULTICULTURAL AUDIENCE

NBA has one of the most culturally and racially diverse following of all the sports. African-Americans and Asian-Americans fans spend the most time watching, followed by Hispanics. While all fans have spent more time watching the NBA over the past decade, the jump in African-American viewership has been astounding — a 63% increase! Despite the NBA's younger overall audience, the increase in the amount of time spent watching was actually driven most by older age groups for Hispanics and African-Americans.

Race/Ethnicity (P2+)	'03/'04 average minutes viewed	'13/'14 average minutes viewed	Growth '03/'04 average minutes viewed
Black	518	844	62.9%
Asian-American	464*	729	57.1%*
Hispanic	341	390	14.4%
White	255	290	13.7%

*2010-2011 viewership. Asian households were not measured prior to 2010.

With 43% of its audience under 35, the NBA has one of the youngest fanbases of all sports. While white viewers still watch the least on average in the 18 – 34 demographic, they're quickly catching up with Hispanic viewers.

Race/Ethnicity (P2+)	'03/'04 average minutes viewed	'13/'14 average minutes viewed	Growth '03/'04 average minutes viewed
Blacks 18-34	568	884	56%
Hispanics 18-34	403	456	13%
Whites 18-34	275	392	43%

LOCAL MARKET INSIGHTS:

- What kind of impact can one player have upon a team's fan following? Prior to LeBron James's rookie season in Cleveland, the Cavaliers' fan following was 24% of Ohio's largest media market. By the time "The King" took his talents to South Beach, the Cavs' fan following had surged to 58% of Cleveland, an increase of 142% in seven years. In Miami, the Heat's fan following stood at 34% prior to LeBron's arrival, but by the time he departed South Beach at the end of the 2013-2014 season, the Heat's fan following had swelled to 54% of the Miami market – an increase of 58% in the space of four years.

“Since 2009, the Clippers' fan following has increased by an **ASTOUNDING 61%**”

- With one of the NBA's most exciting young rosters, the Los Angeles Clippers have seen the largest percentage increase in their home local market in the past five years. Since 2009, the Clippers' fan following has increased by an astounding 61%, making up 21% of the L.A. market. In the same time frame, the Los Angeles Lakers' fan following has declined by 23%, bringing them down to 32% of the L.A. market.



TOP NBA ADVERTISERS

- 1 State Farm Insurance
- 2 Sprint Wireless
- 3 Taco Bell
- 4 Kia Motors
- 5 Samsung Galaxy S5

FAN INSIGHTS

Compared to the average US adult, avid NBA fans are:

- 45%** more likely to have eaten at a fast food restaurant 10+ times in the past 30 days
- 30%** more likely to have rented a car in the past 12 months
- 53%** more likely to have spent more than \$100 in athletic shoes in the past 12 months

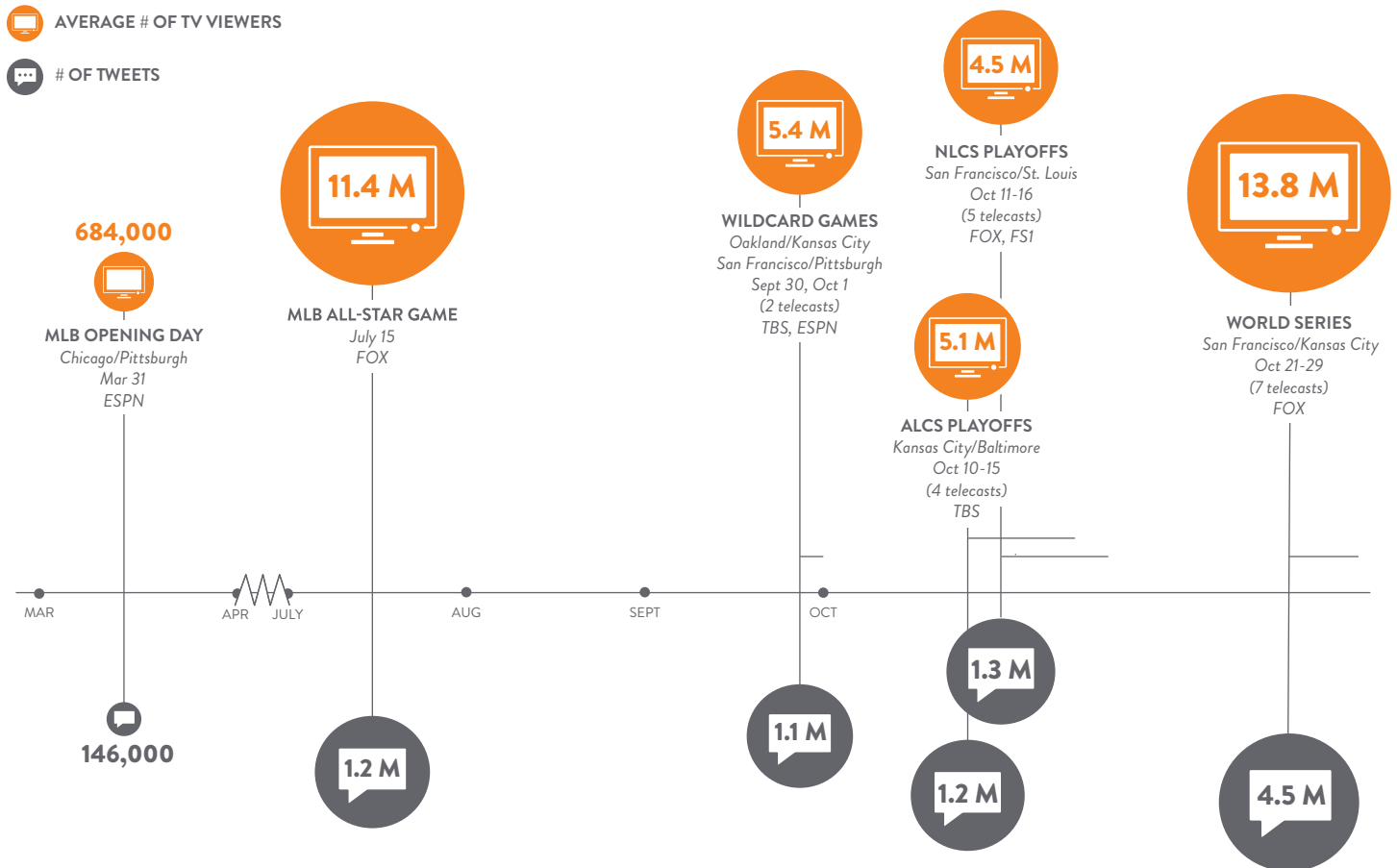


MAJOR LEAGUE BASEBALL

The MLB may no longer be the “national” past-time from a TV audience perspective, but it is, however, stronger than ever among local markets. 11 out of the 30 MLB teams claimed title as the highest-rated, most-watched local programming during primetime for both broadcast and cable during the 2014 season. Another 6 ranked within the top 3 in local primetime within their respective networks.

New Yorkers bid Derek Jeter, who announced his retirement in spring, a heartfelt farewell in his last ever game on YES Network. A record 1.99 million viewers in the New York DMA (10.8 HH) tuned into his final game, making it YES Network’s most viewed telecast ever.

TIMELINE OF SEASON HIGHLIGHTS



* Tweets were added up across all events in the NLCS Playoffs, ALCS Playoffs and World Series.



People in the U.S. who Tweet about MLB games are 31% more likely to Tweet about the Insurance brands than they are to Tweet about brands in general. (3/22/2014 – 9/28/2014)

MLB FAN-BASE FOUND OUTSIDE OF TRADITIONAL MLB MARKETS

The MLB has more outer market viewers in C and D counties than other sports. The MLB out-of-market audiences make up 42% of MLB games total household viewing. In addition, although more households tune in to national MLB games than those on regional networks, local team affinity drives the majority of viewership. Regional sports networks accounted for 70% of total household minutes viewed across all (Regional and National) MLB games.



TOTAL HOUSEHOLD REACH OF REGIONAL GAMES

	MAY '14	JULY '14
MLB Market	20,651 (57%)	18,938 (58%)
Non-MLB Market	15,318 (43%)	13,662 (42%)

TOTAL HOUSEHOLD REACH OF NATIONAL GAMES

	MAY '14	JULY '14
MLB Market	21,484 (47%)	23,151 (48%)
Non-MLB Market	24,175 (53%)	25,545 (42%)

TOTAL HOUSEHOLD MINUTES SPENT VIEWING ALL (REGIONAL AND NATIONAL) MLB GAMES

	MAY '14	JULY '14
MLB Market	12,008,036 (59%)	11,084,057 (57%)
Non-MLB Market	8,370,152 (41%)	8,496,079 (43%)

LOCAL MARKET INSIGHTS:

- St. Louis is often called baseball's best city. In Scarborough data, they are unrivaled, having ranked #1 in eleven out of fifteen years since 2000, and #2 in every year that they have not been #1. They are top again this year, with 76% of St. Louis market adults as fans, compared to the St. Louis Rams at 48%. St. Louis, however, isn't the only big baseball town... There are a handful of markets where the MLB team ranks ahead of the NFL team, including Atlanta, Tampa, Detroit, Boston, and New York.
- There are more Yankees fans in the New York market (6.8 million) than there are adults in Philadelphia (6.3 million), America's #4 media market.

TOP MLB ADVERTISERS

- Chevrolet Silverado
- Budweiser
- Taco Bell
- Geico
- T-Mobile

FAN INSIGHTS

Compared to the average US adult, avid MLB fans are:

20% more likely to have used a car rental company in the past 12 months

22% more likely to have gone on a cruise in the past 3 years

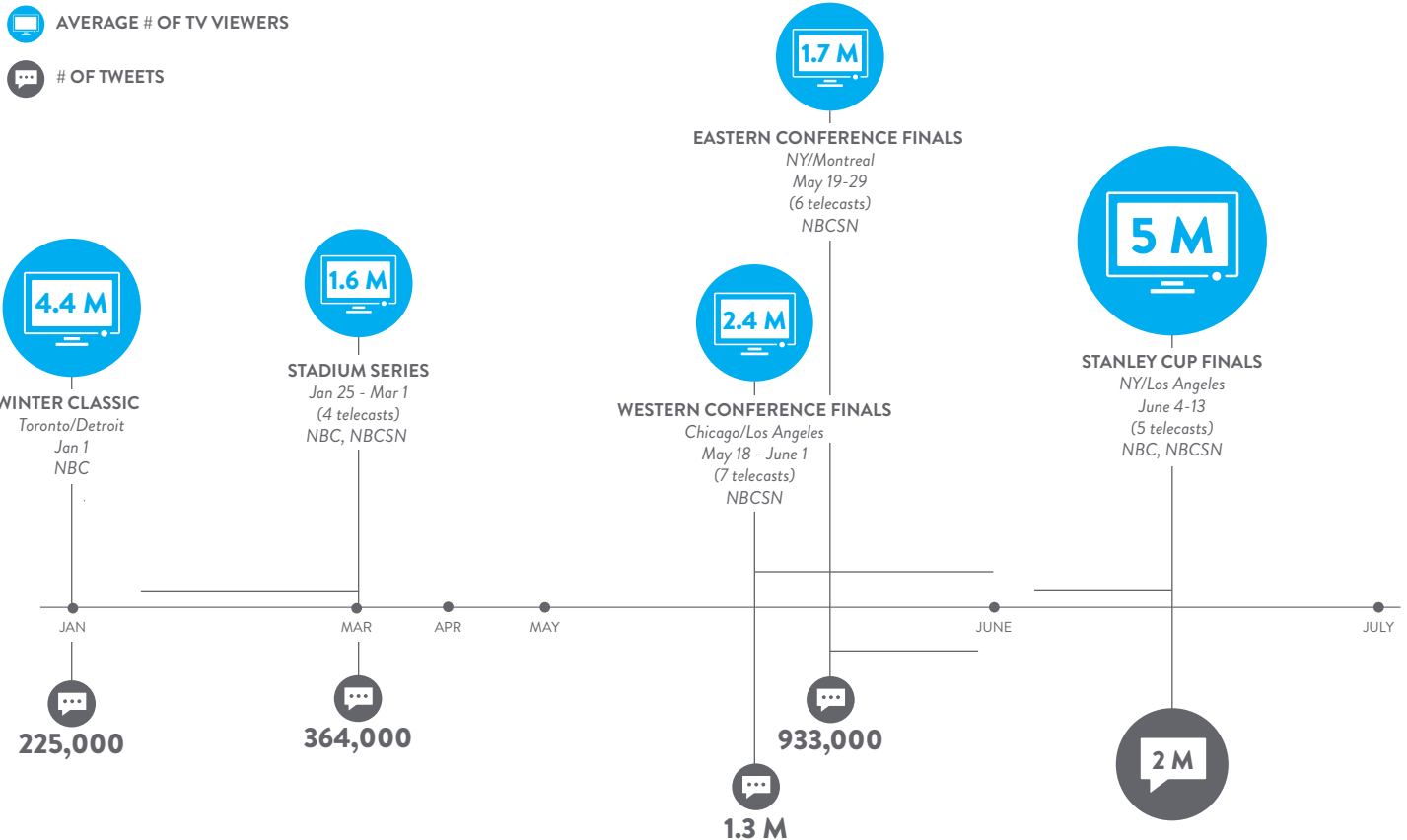
70% more likely to have spent more than \$100 on sports equipment in the past 12 months



After last season's shortened season of only 48 games, 2014 more than made up for the reduced hockey action last year. In addition to the regular full season, NHL fans were treated to an entirely new set of outdoor games, the Stadium Series.

The action-packed season finished up with the legendary Montreal Canadiens and the three largest US markets facing off in the Conference Finals. The nailbiting Game 7 of the Western Conference Finals between the Chicago Blackhawks and LA Kings set a record as the most-watched non-Stanley Cup Final NHL Playoff game ever. While they may not have made it to the Finals, the Chicago Blackhawks had plenty of moral support—their final game at the Western Conference Finals earned a 22.7 HH local rating.

TIMELINE OF SEASON HIGHLIGHTS



* Tweets were added up across all events in the Stadium Series, Western Conference Finals, Eastern Conference Finals and Stanley Cup Finals.

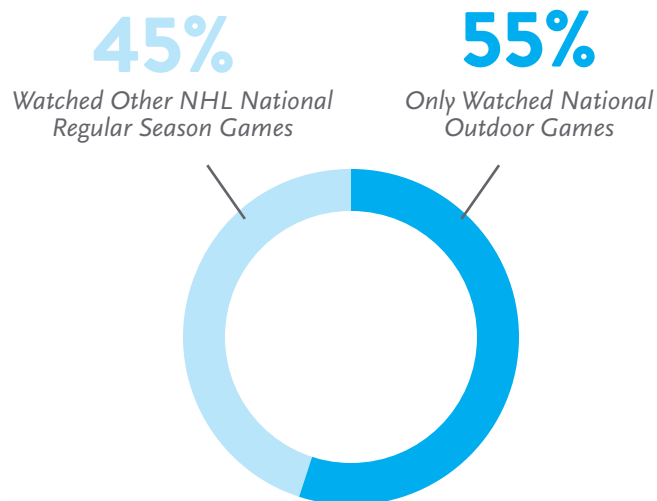
People in the U.S. who Tweet about NHL games are 58% more likely to Tweet about the Financial Services category than they are to Tweet about brands in general. (10/1/2014 – 4/13/2014)

THE NHL STADIUM SERIES INVITING NEW FANS INTO THE TENT

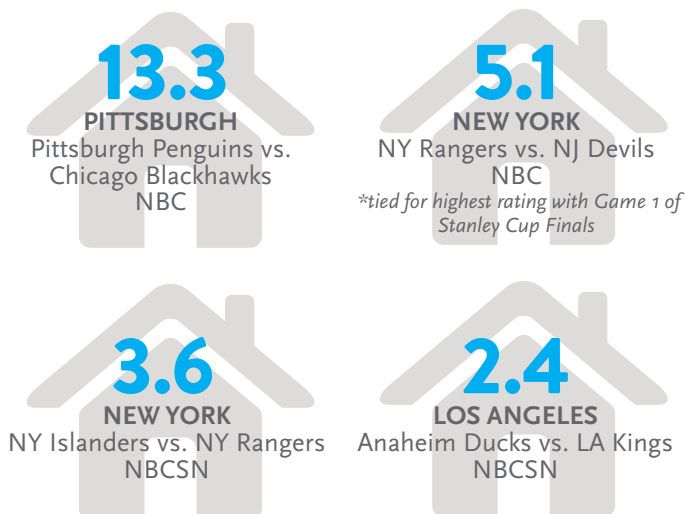
The NHL gave fans their fill of a record 6 outdoor games this year, including the new 4-game Stadium Series. With more than 23.7 million reached, the games were national and local hits not just with hockey fans, but with non-fans as well.

For 12.8 million (55%) viewers, the Outdoor Games was the only nationally-televised regular season hockey they watched all year.

TOTAL REACH OF OUTDOOR GAMES



LOCAL HOUSEHOLD RATINGS RECORDS



The games made regular season network ratings records within their respective markets.



LOCAL MARKET INSIGHTS:

- With a higher than average N-score among hockey players, prolific goal scorer Sid “The Kid” Crosby has helped make Pittsburgh a big-time hockey market. In the year prior to his arrival, 2004, only 33% of the market was fans. Ten years later, Penguins claim 57% of Pittsburgh their fans, earning the title as the number one hockey market!
- The Blackhawks have enjoyed an extraordinary resurgence in the Chicago market over the past 7 years, no doubt thanks to more local home games on TV and winning several Stanley Cups. In 2007, just 8% of Chicagoans were Blackhawks fans; by 2014 that had number grown to 50%.

TOP NHL ADVERTISERS

- 1 Discover Credit Card
- 2 Geico Auto Insurance
- 3 MyCleanPC.com
- 4 Verizon Wireless
- 5 Bud Light

FAN INSIGHTS

Compared to the average US adult, avid NHL fans are:

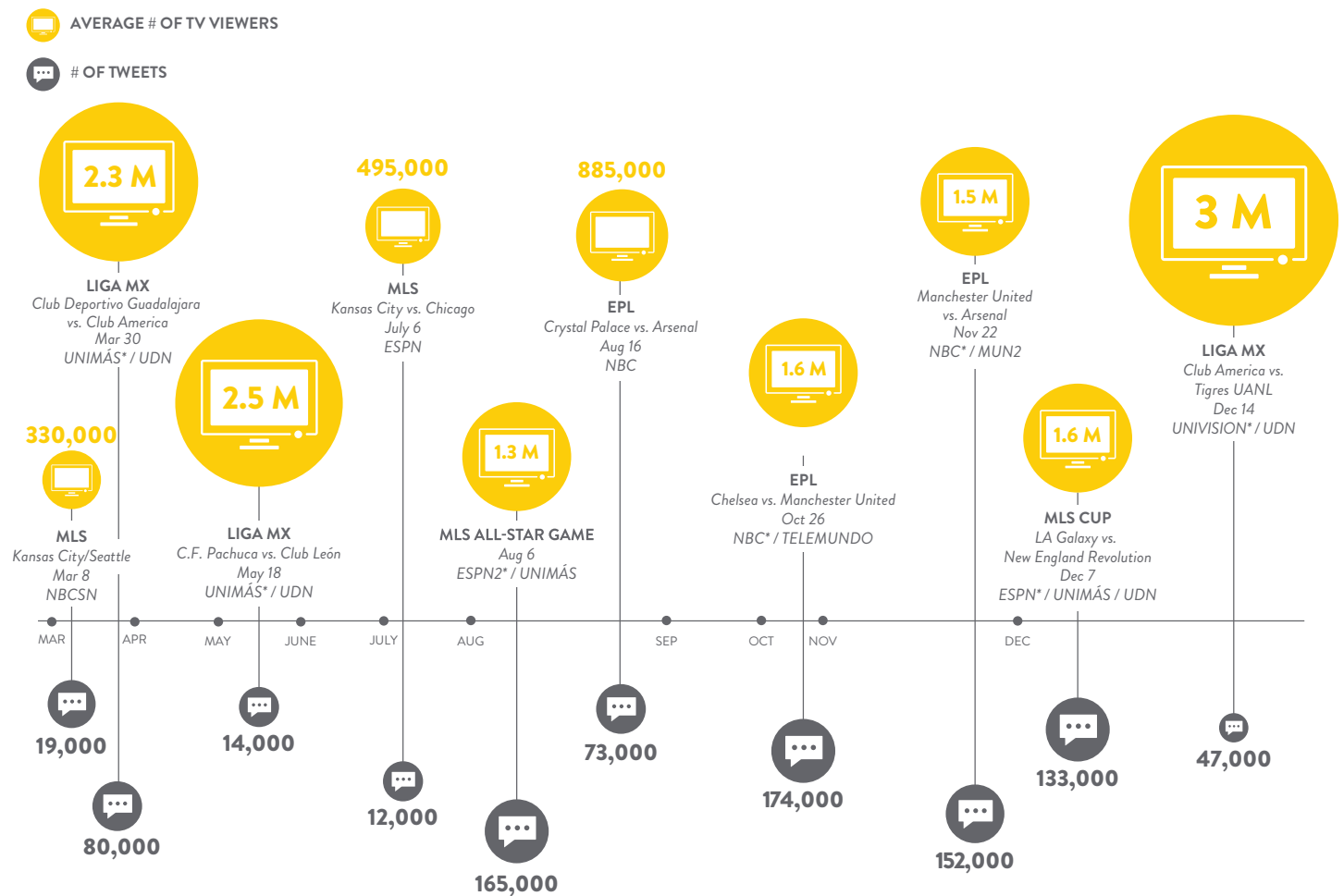
- 15% more likely to own both a tablet and a smartphone
- 29% more likely to have spent \$5,000 or more on home improvements in the past 12 months
- 45% more likely to have taken a domestic flight 3 times or more in the past 12 months

SOCCER

The beautiful game was still fresh on everyone's minds in mid-August when EPL had its record-setting opening weekend, and EPL's regular season has since kept up the great start with increased ratings on both NBC and NBCSN. EPL's most viewed game, Manchester United vs. Arsenal, was watched by 1.4 million Americans on NBC—an increase of 14% over the most watched game on NBC last season—and by another 112,000 on Mun2. MLS, meanwhile, ended with a bang with the MLS Cup. The overtime match between LA Galaxy and New England Revolution drew a combined 1.6 million viewers, the largest audience since 1997!

Liga MX, however, beat out both MLS and EPL as America's most followed soccer league—an impressive 1.6 million Americans watched Club America face off against Tigres UANL in the LMX Apertura final on Univision!

TIMELINE OF SEASON HIGHLIGHTS








*For multicast events, networks are listed alphabetically and metrics reflect the highest Tweets across all airing networks, denoted with an asterisk.









People in the U.S. who Tweet about Major League Soccer games are 57% more likely to Tweet about the Credit Card category than they are to Tweet about brands in general. (3/8/2014 – 10/25/2014)

RICH SOCCER FANS HAVE OPEN WALLETS

According to Nielsen Scarborough, soccer fans are 20% more likely than the average American to have household incomes over \$100,000, and 31% more likely to have children under 17 at home. With bulging wallets and growing families, soccer fans are invaluable consumers. They spend 7% more than the average household on groceries alone!

						
Average Spent in Past 12 Months	\$7,429	\$265	\$115	\$177	\$3,620	\$859
% More than Average	+7.2%	+6.2%	+15%	+8.7%	+2.2%	+9.5%

One area that they're interested in spending in is in technology. Per Nielsen's Games 360 survey, soccer fans report higher purchase intent in the next 6 months compared to the general population. And they're not just buying tech for the kids—70% of soccer fans say they personally play video game consoles and handhelds.

						
Soccer Fans	37%	29%	24%	23%	20%	20%
General Population	23%	18%	18%	16%	11%	8%

LOCAL MARKET INSIGHTS:

- The Seattle Sounders FC, consistently among the top teams in MLS for Scarborough fan following, are the top MLS team in this release. Twenty three percent of Seattle market adults are fans of the Sounders.
- Although separated by an ocean and the entire length of the United States, the top three markets (by percentage) for adults who are interested in European Soccer are all in California:
 1. San Diego, 22%;
 2. San Francisco/Oakland/San Jose, 19%;
 3. Los Angeles, 18%.



TOP NFL ADVERTISERS

- 1 Adidas
- 2 Continental Tires
- 3 Microsoft Windows
- 4 Volkswagen Passat
- 5 Century 21 Realtors

FAN INSIGHTS

Compared to the average US adult, avid MLS fans are:

- 49%** more likely to plan on buying or selling a house, condo, or co-op in the next 12 months
- 46%** more likely to have taken 3 or more domestic air round trips in the past 12 months
- 99%** more likely to have drunk an energy drink in the past 7 days



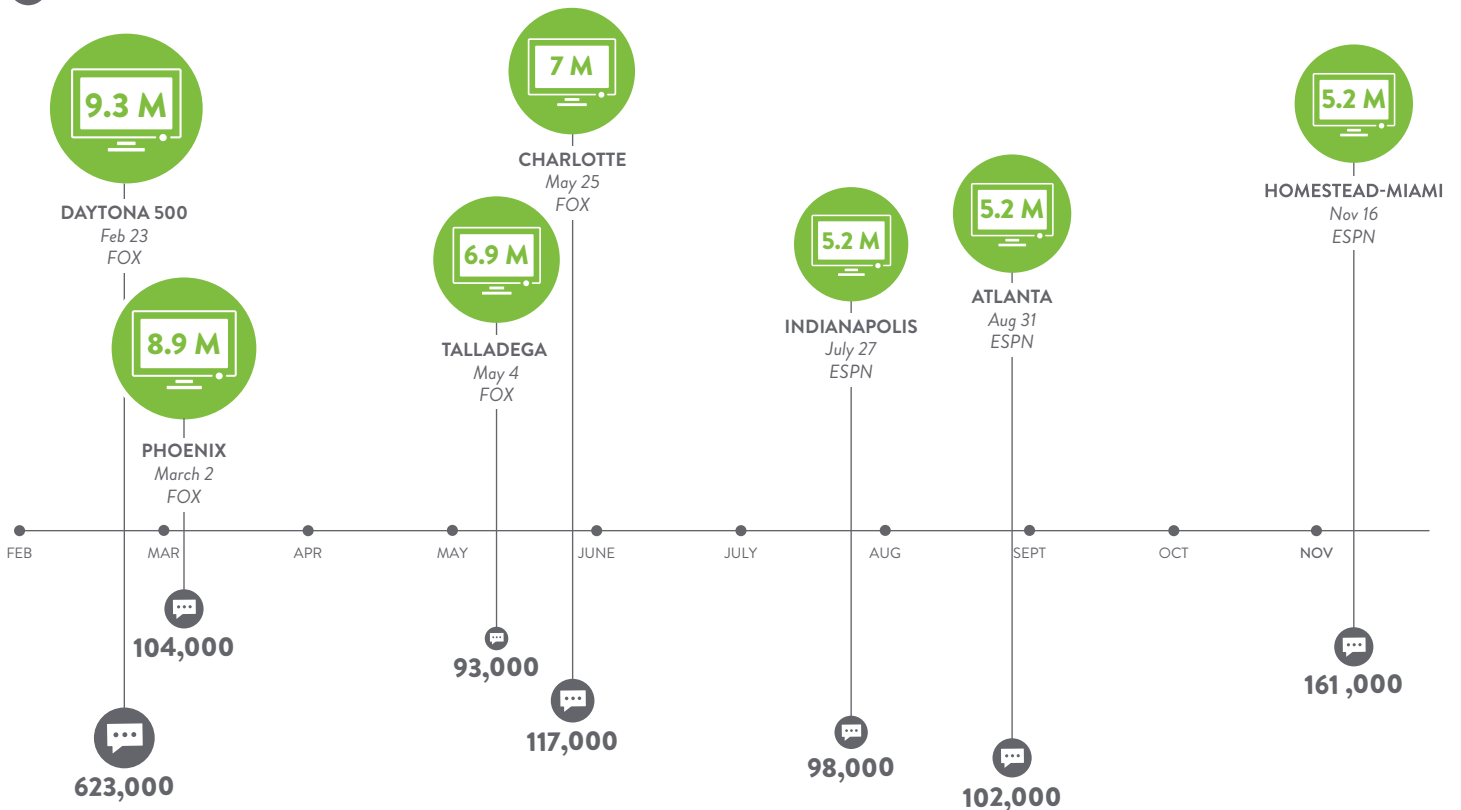
Although the rain impacted the Daytona 500, excitement sped up to hit at a fever pitch over the season. This year saw a major overhaul of the Chase format, introducing an elimination-style format culminating in a single championship event between the final four competitors. The new format's high-stakes unpredictability generated intense competition and excitement like never before, transcending NASCAR from the sports page to the mainstream news.

The historically unprecedented changes resonated in a big way with fans. Social media activity regarding NASCAR went through the roof, and 5.2 million Americans tuned in to watch the final race at Homestead-Miami—the most in 3 years.

TIMELINE OF SEASON HIGHLIGHTS

AVERAGE # OF TV VIEWERS

OF TWEETS



People in the U.S. who Tweet about NASCAR races are 36% more likely to Tweet about the Cable Television System brands than they are to Tweet about brands in general. (2/23/2014 – 11/16/2014)

NASCAR FAN FAVORITES

Auto racing fans are devotedly loyal to their favorite drivers, but according to Nielsen Talent Analytics, there are some clear consistent favorites. Fans are most likely to agree that clean-cut Dale Earnhardt, Jr. is a role model, while hot-blooded Kyle Busch has earned himself a “bad boy” reputation. And although supercouple Danica Patrick and Ricky Stenhouse, Jr. might be close in NASCAR rankings, gorgeous Danica has Ricky schooled in style and looks—just 9% find Ricky stylish, and 21% find him good-looking. As for how fans feel about the champ, Kevin Harvick? Unsurprisingly, a third of fans rate him influential.

RACER	Carl Edwards	Greg Biffle	Danica Patrick	Dale Earnhardt, Jr.	Kyle Busch	Chase Elliott
ATTRIBUTE	Dependable	Likeable	Good-Looking Stylish	Role Model Social Media Savvy	Disliked	Trendsetter
% AGREE	51%	74%	55% 36%	42% 30%	16%	23%

**Among auto racing fans who are aware of the given racer*

... SOCIAL MEDIA INSIGHTS:

With so much intensity and unpredictability around the new format, NASCAR-related Twitter activity during NASCAR’s Chase for the Sprint Cup jumped up 83% from 2013! Some top events during the Chase that set Twitter activity into high gear:

At 11:29 pm EST, during the Bank of America 500, **1,500 Tweets** were sent after Matt Kenseth blindsided Brad Keselowski in the garage, starting a fight between their respective teams.

At 7:09 pm EST, during the AAA Texas 500, **1,000 Tweets** were sent after NASCAR informed teams they can get an extra set of Goodyear Racing Tires, first come first serve.

At 6:36 pm EST, during the Quicken Loans Race for Heroes 500, **1,400 Tweets** were sent when Ryan Newman barreled into Kyle Larson in turn 3 to secure a spot in the NASCAR Sprint Cup Championship.

The most tweeted minute of the Chase for the NASCAR Sprint Cup Championship race was at 6:43pm EST, when **3,200 Tweets** were sent after Kevin Harvick won the race and the 2014 NASCAR Sprint Cup Championship.



30% of unique authors that Tweeted about the NASCAR Chase for the Sprint Cup were females, which is higher than the typical female author percentage for other sports programming, such as the NFL and NBA.

TOP NASCAR ADVERTISERS

- 1 Sprint
- 2 KFC
- 3 Nationwide Insurance
- 4 Cialis Rx
- 5 Budweiser

FAN INSIGHTS

Compared to the average US adult, avid NASCAR fans are:

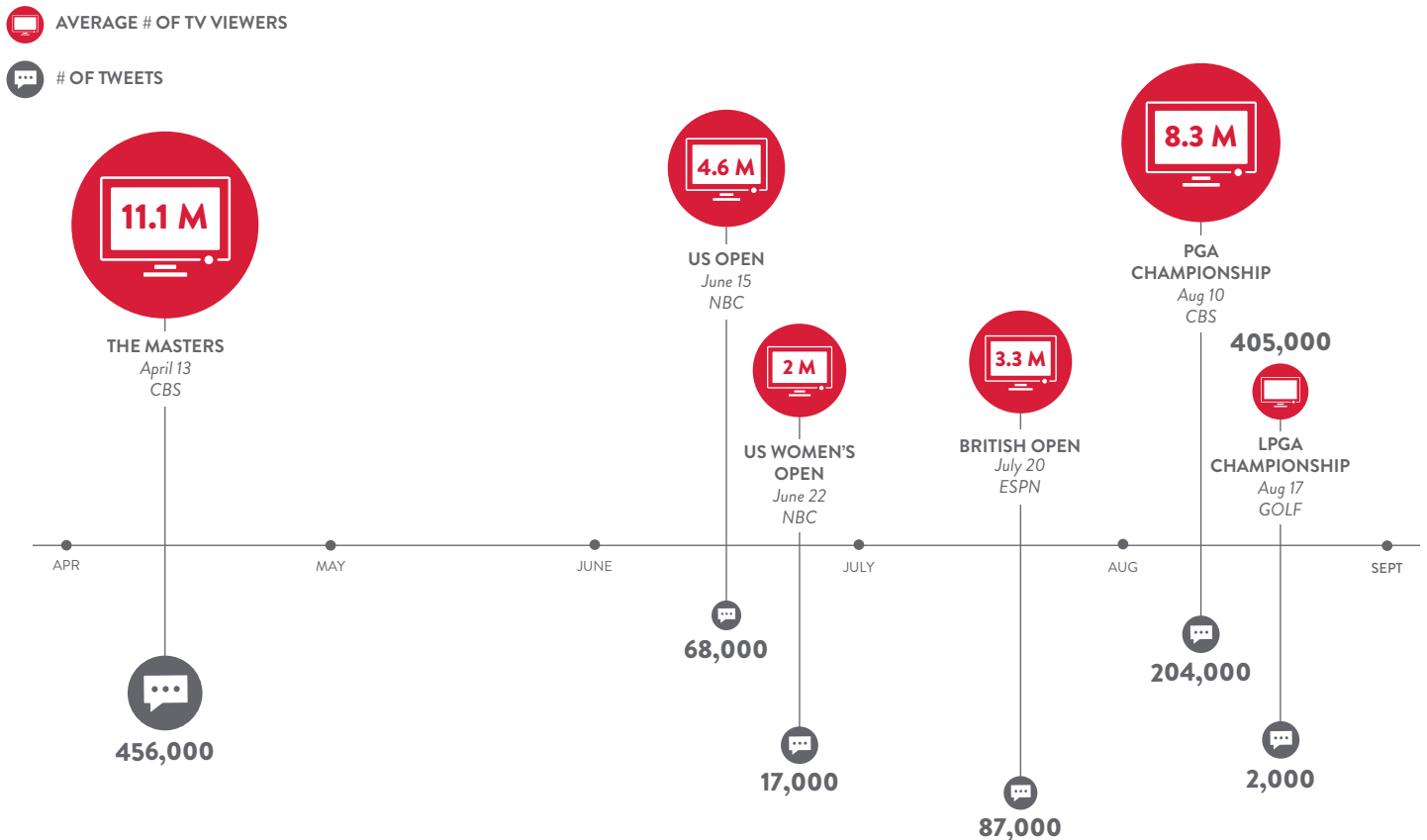
- 17%** more likely to have at least 3 vehicles in their household
- 31%** more likely to have contributed money towards veterans’ associations in past 12 months
- 20%** more likely to plan to buy a high-definition television (HDTV) in next 12 months



Tiger Woods may not have won any majors in several years, but his absence was nonetheless still noticeable in the Masters and US Open's lower ratings this year. Fortunately for golf fans (and for Nike), there's a new rising star on the horizon in both talent and in ratings. Rory McIlroy took the spotlight by not only winning the British Open, but the PGA Championship as well, making him one of just 3 golfers to have won three majors by age 25.

And where talent goes, audiences follow. More than 8.3 million people watched McIlroy win the PGA Championship, the biggest audience in 5 years and 49% more than in 2013.

TIMELINE OF SEASON HIGHLIGHTS









* Tweets were added up across all events in The Masters, U.S Open and PGA Championship



People in the U.S. who Tweet about PGA tour tournaments are 68% more likely to Tweet about the Financial Services category than they are to Tweet about brands in general. (10/7/2013 – 8/17/2014)

RORY McILROY RESONATES WITH YOUNGER GOLF FANS

Although Rory McIlroy is often heralded as the next Tiger of golf, according to Nielsen's Talent Analytics, the two talented golfers attract very different fans. Compared to the general population, for instance, Tiger's fans are 42% more likely to belong to the AARP, whereas Rory's fans are 186% more likely to belong to the local PTA.

	Tiger Woods	Index	Rory McIlroy	Index
 HEAD OF HOUSEHOLD OCCUPATION	Not Working	126	Legal	323
 FAMILY	Married Couple Only (At Home)	143	Married Couple with Children (At Home)	196
 ORGANIZATIONS	Belongs to the AARP	142	Belongs to the PTA	286
 MUSIC PURCHASED IN LAST YEAR	Country	131	Rap/Hip Hop	140
 HOBBIES IN THE PAST YEAR	Went Hunting	133	Went Snowboarding	172
 TRAVEL (LAST 3 YEARS)	Took a cruise to Alaska	166	Traveled to Greece	438

LPGA INSIGHTS:

Young, fresh talent wasn't limited to men's golf. 25-year-old Michelle Wie finally earned her first major win at the US Women's Open, pushing the weekend viewership up a staggering 106%.

Her impressive win won her the admiration of many, not least women. According to Nielsen Talent Analytics, 45% of women who know of Michelle Wie consider her a role model. By comparison, only 23% feel the same way about Rory.



TOP GOLF ADVERTISERS

- 1 FedEx
- 2 Mastercard
- 3 TaylorMade SLDR Golf Clubs
- 4 Cialis Rx
- 5 Aflac

FAN INSIGHTS

Compared to the average US adult, avid PGA fans are:

28% more likely to have drunk diet soda in the past 7 days

66% more likely to have purchased cholesterol medication

31% more likely to have gone to a sit-down restaurant at least 5 times in the past 30 days



NCAA BASKETBALL

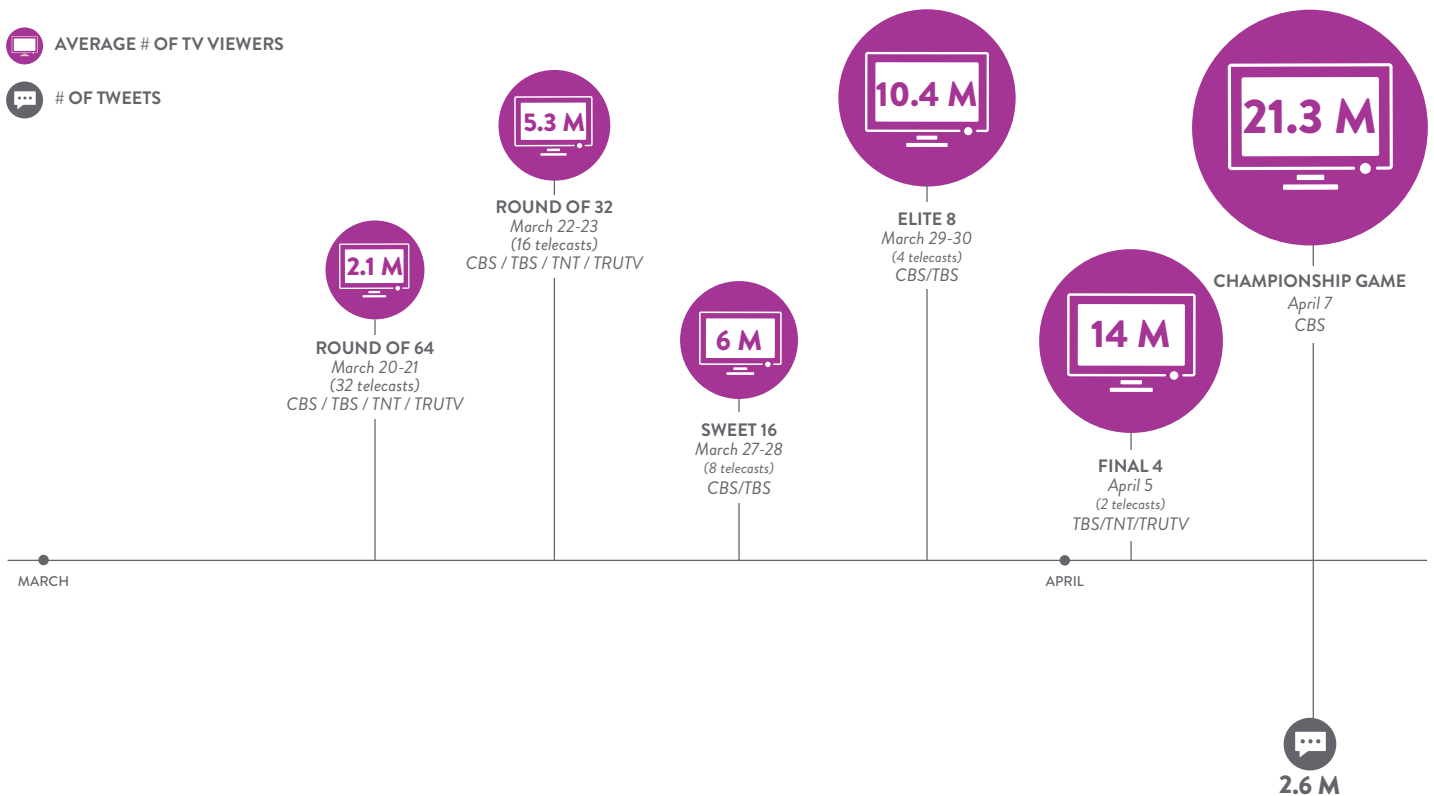
Men's college basketball fans excitement about college hoops built a lot of momentum throughout the season and hit a crescendo heading into March Madness. The average hoops audience grew steadily each month over the course of the regular season, as the average audience increased 133% from Nov '13 to March '14.

After cinching the men's Championship, UConn went on to make history (again!) by winning both the men's and women's teams for the second time. No doubt due to the two undefeated teams showcased in the championship game (Notre Dame and UConn), the Women's Championship game attracted an average 4.3 million viewers, a 33% increase from 2013 and the highest since 2004.

TIMELINE OF SEASON HIGHLIGHTS

 AVERAGE # OF TV VIEWERS

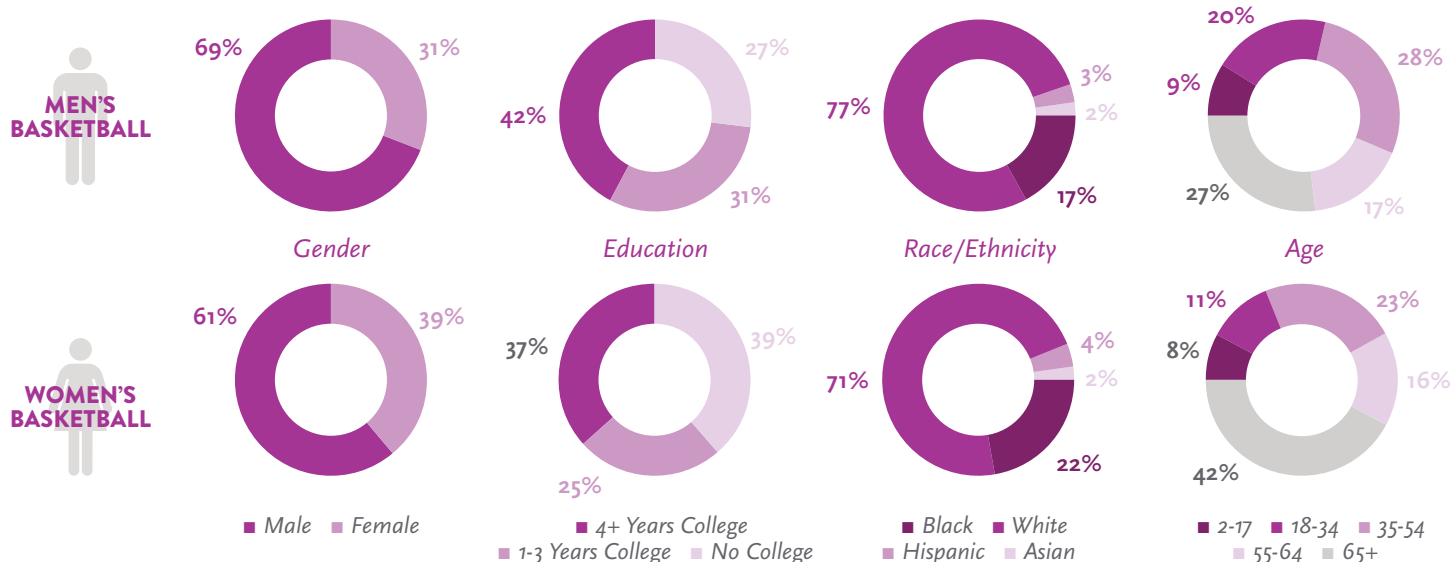
 # OF TWEETS



People in the U.S. who Tweet about NCAA Basketball games are 24% more likely to Tweet about the Banks than they are to Tweet about brands in general. (11/18/2013 – 3/11/2014)

WHO'S WATCHING COLLEGE BASKETBALL?

It goes beyond just gender for college basketball fans—men's and women's college basketball attracts entirely different audiences. Compared to men's basketball, women's basketball viewers tend to be significantly older—44% over age 65—and less likely to be college-educated. Women and African-Americans comprise a larger part of the audience.



LOCAL MARKET INSIGHTS:

- Bluegrass Basketball Rivalry:** In Lexington, home market of the Kentucky Wildcats, 70% of adults are Kentucky basketball fans, compared to 22% for Louisville Cardinals basketball. In the Louisville market, however, the divide between fans is less drastic; 55% of adults are fans of the Cardinals, while 46% are fans of the Wildcats.
- Basketball Royalty:** The Connecticut Huskies cut down the nets in 2014 in both the men's and women's NCAA basketball tournaments, completing a rare sweep of both titles. Their matching prowess has earned both teams similar levels of support. In the Hartford DMA, 32% of adults are fans of Connecticut women's basketball and/or men's basketball.
- Tobacco Road:** The Raleigh-Durham market is home to three programs that have each won multiple NCAA Basketball Championships. 36% percent of Raleigh-Durham adults are fans of North Carolina; 32% are fans of Duke; 29% are fans of North Carolina State.

TOP 5 ADVERTISERS

- 1 Capital One
- 2 Bud Light
- 3 Southwest Airlines
- 4 AT&T
- 5 All-State Insurance

FAN INSIGHTS

Compared to the average US adult, avid NCAA Basketball fans are:

- 31%** more likely to have bought computer hardware/software in the past 12 months
- 32%** more likely to own stocks/stock options
- 41%** more likely to have drunk whiskey in the past 30 days

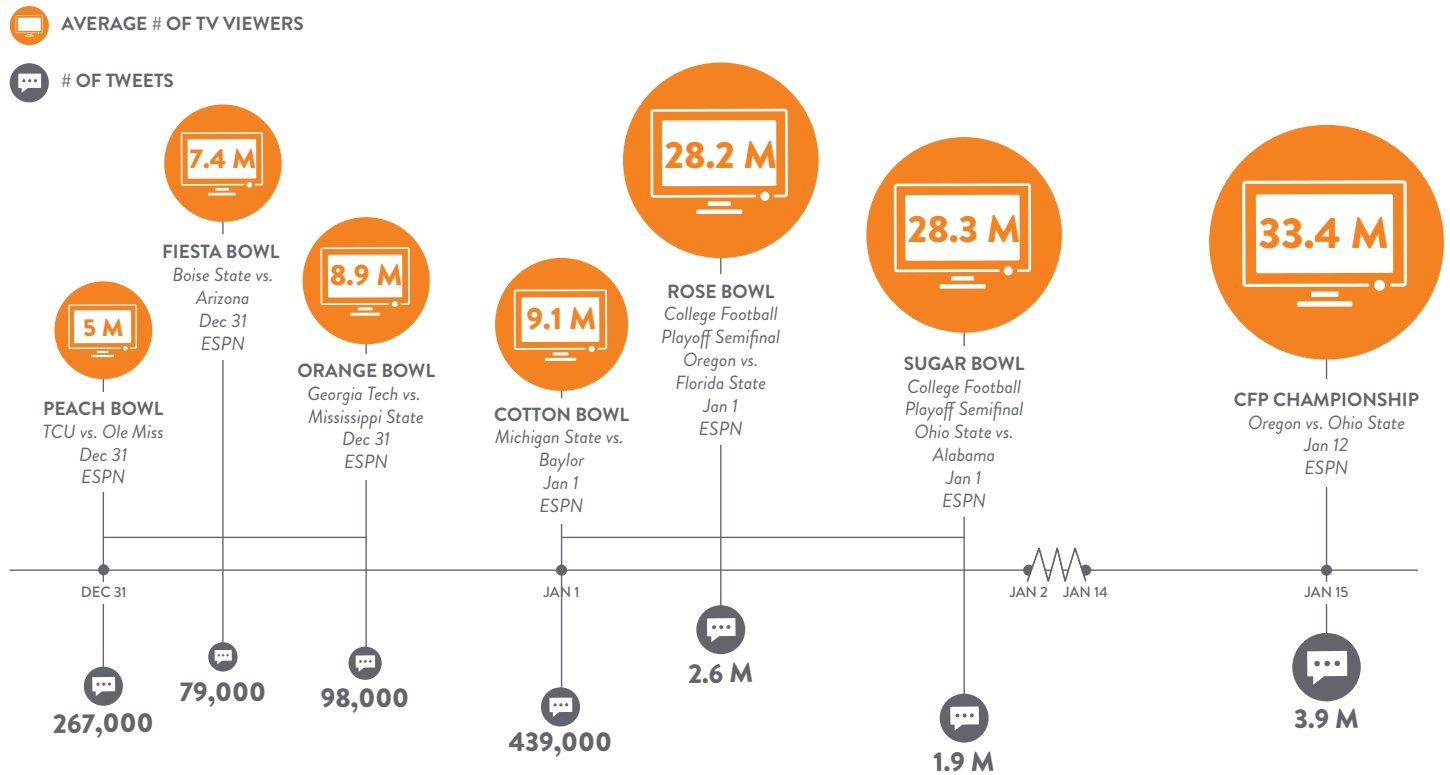



NCAA FOOTBALL

College football had a strong season, airing 27 games with an audience over 5 million and 97 games with an audience larger than 2.5 million (including bowls/playoffs/conference championship games). Along with conference realignments, changes in the format of the postseason made 2014 a fascinating season to watch.

The 2015 College Football postseason was somewhat of a Cinderella story for the Big 10. After upsetting Alabama and the Pac-12 “powerhouse,” Oregon, the Ohio State Buckeyes became the champions of the first-ever College Football Playoff National Championship. This new format heightened excitement around the end of the college football season, as viewership for the playoff games, the Rose Bowl and Sugar Bowl, increased dramatically from 2014. Fans watched the postseason specifically to see the road to the Championship Game, whereas other bowl games not part of the playoffs this year were down in viewership from the 2013-2014 postseason.

TIMELINE OF SEASON HIGHLIGHTS



 People in the U.S. who Tweet about NCAA Football games are 30% more likely to Tweet about the Insurance brands than they are to Tweet about brands in general. (8/27/2014 – 12/13/2014)

SEASON OVER SEASON TV VIEWERSHIP: PLAYOFF FORMAT VS. BOWL GAMES

The hype for the College Football National Championship was dramatically increased by the addition of the two playoff games, during the Rose Bowl and the Sugar Bowl. The Rose Bowl averaged 28.2 million viewers and the Sugar Bowl drew 28.3 million, higher than the same, non-playoff, bowl games in the 2013 season by 51% and 73% respectively. However, as we might expect, viewership for the other non-playoff bowl games was down dramatically. The only exception was the Cotton Bowl, which in the 2013 season was a second tier game and not a part of the Bowl Championship Series. Now in the rotation for the new College Football Playoffs, the Cotton Bowl saw significant increase in viewership due to higher profile teams.

Unlike last year's BCS Championship Game between Auburn and Florida State, which was down by 3.1% in viewership from the 2012 season, this year's first-ever College Football Playoff revived excitement for the National Championship. Average viewership for the CFP Championship between Ohio State and Oregon surpassed 2013 season numbers by over 30%.

NCAA EVENT	AVERAGE VIEWERS 2013 SEASON	AVERAGE VIEWERS 2014 SEASON	CHANGE FROM '13 TO '14 SEASON	
Peach Bowl	8,689,000	5,013,000	-42.3%	
Fiesta Bowl	11,304,000	7,406,000	-34.5%	
Orange Bowl	11,400,000	8,935,000	-21.6%	
Cotton Bowl	6,541,000	9,086,000	+38.9%	
Part of the College Football Playoffs	Rose Bowl	18,636,000	28,164,000	+51.1%
	Sugar Bowl	16,339,000	28,271,000	+73.0%
	CFP Championship	25,572,000	33,395,000	+30.6%

LOCAL MARKET INSIGHTS:

- **Scarlet & Gray:** As the 2015 winners of the first-ever College Football Playoff, the Ohio State Buckeyes count 64% of Columbus market adults as fans. By comparison, the Oregon Ducks, which lost to Ohio State in the national title game, lay claim to 56% of the Eugene market adults as fans. Among the College Football Playoff semifinalists, 66% of Birmingham adults are fans of Alabama, tops among all college football programs for local market fan following. Meanwhile, 44% of Tallahassee-Thomasville market adults support Florida State.
- **"Gig 'Em" or "Hook 'Em"?:** Fueled by the Aggies' migration to the Southeastern Conference, Texas A&M's football fan following in the Houston market has increased by 26% over the past five years, while the Texas Longhorns has dropped 30%. Texas A&M fans now comprise 24% of Houston adults, surpassing the Longhorns at 18%. A similar situation has played out in Dallas-Fort Worth, where the Aggies' fan base has grown by 24% and the Longhorns' down by 31%.

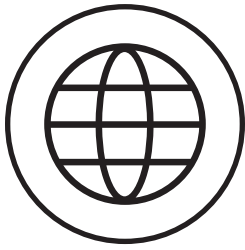
TOP 5 ADVERTISERS

- 1 AT&T
- 2 TacoBell
- 3 Geico
- 4 Capital One
- 5 Home Depot

FAN INSIGHTS

Compared to the average US adult, avid NCAA Football fans are:

- 34%** more likely to have gone to a quick service restaurant at least 10 times in the past 30 days
- 32%** more likely to have had an energy drink in the past 7 days
- 42%** more likely to have requested overnight delivery services in the past 12 months

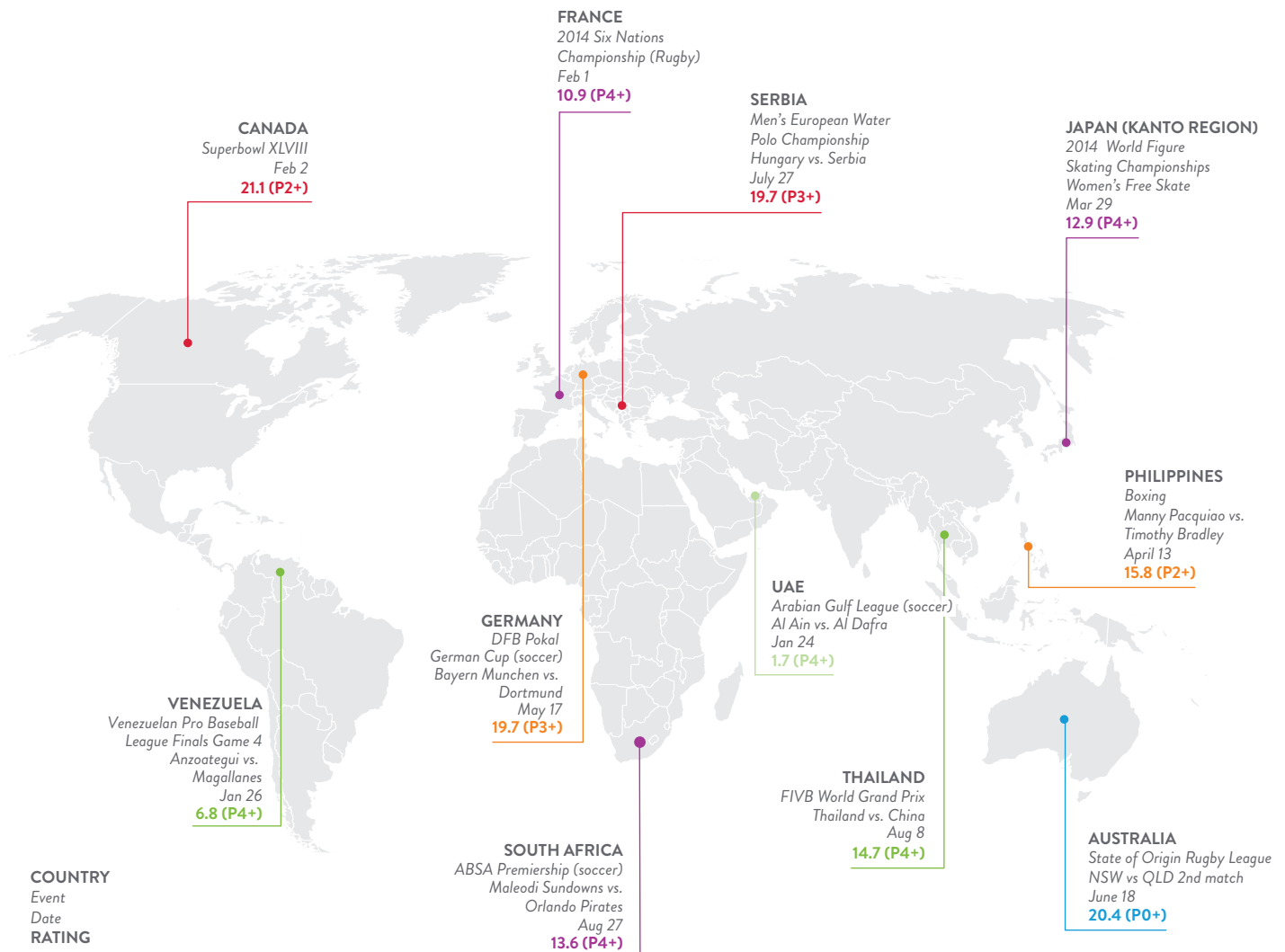


GLOBAL VIEW

Although countries the world over all tuned in for the World Cup and the Olympics, other popular sporting events varied from country to country. In Malaysia, for instance, badminton's Thomas Cup final was the most watched sport aside from soccer. Meanwhile, on the opposite side of the world, more than 28% of Finland's population demonstrated some patriotic pride watching their country face off against Russia in the Ice Hockey World Championships. Here is how some other major televised sporting events fared around the world:



MAJOR TELEVISED SPORTING EVENTS AROUND THE WORLD



GLOBAL VIEW OF OLYMPICS



RUSSIA
Opening Ceremony
Feb 7
17 (P4+)
35.8



FRANCE
Opening Ceremony
Feb 7
9.3 (P4+)
35.3



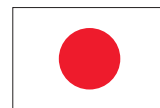
NETHERLANDS
Men's Speed Skating
Feb 8
29.5 (P6+)
87.4



UK
Women's Skeleton
Feb 14
6.6 (P4+)
23.5



BRAZIL
Men's Free Skating
Feb 14
1.6



JAPAN
Women's Ice Hockey
Russia vs. Japan
Feb 15
13.1 (P4+)
40.9



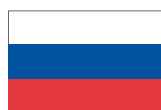
POLAND
Ski Jumping
Men's Individual Large Hill
Feb 15
29.6 (P4+)
59.3



NORWAY
Men's Cross Country Relay
Feb 16
33 (P2+)
89.4



CANADA
Men's Hockey Final
Canada vs. Sweden
Feb 23
16.6 (P2+)
64.2



RUSSIA
Closing Ceremony
Feb 23
16.4 (P4+)
36.2

COUNTRY
Event
Date
RATING
SHARE

GLOBAL VIEW OF WORLD CUP



BELGIUM (NORTH)
Argentina vs. Belgium
July 5
32.7 (P4+)
83.1



NETHERLANDS
Netherlands vs. Argentina
July 9
58.5 (P6+)
88



BRAZIL
Brazil vs. Germany
July 8
20.6



BELGIUM (SOUTH)
Argentina vs. Belgium
July 5
32.5 (P4+)
81.2



RUSSIA
(3 Simulcasts)
South Korea vs. Russia
June 18
4.4 (P4+) / 3.8 (P4+) / 4.1 (P4+)
60.3 / 40.1 / 49



COSTA RICA
Costa Rica vs. Netherlands
Russia vs. Japan
July 5
15.9



FRANCE
France vs. Germany
July 4
28.6 (P4+)
71.8



SOUTH AFRICA
Germany vs. Argentina
July 13
10.2 (P4+)
50.1



COLOMBIA
Brazil vs. Colombia
July 4
17.3



GERMANY
Germany vs. Argentina
July 13
47.9 (P3+)
86.2



SOUTH KOREA
(3 Simulcasts)
South Korea vs. Russia
June 18
6.9 (P4+) / 6.2 (P4+) / 3.5 (P4+)
30.3 / 27.2 / 19.3



MEXICO
Netherlands vs. Mexico
June 29
9.1



ITALY
Italy vs. England
June 14
22.3 (P4+)
70.3



ARGENTINA
Germany vs. Argentina
July 13
21.9

COUNTRY
Match
Date
RATING
SHARE

Yassine-Guillaume Berhoun
Sport Manager

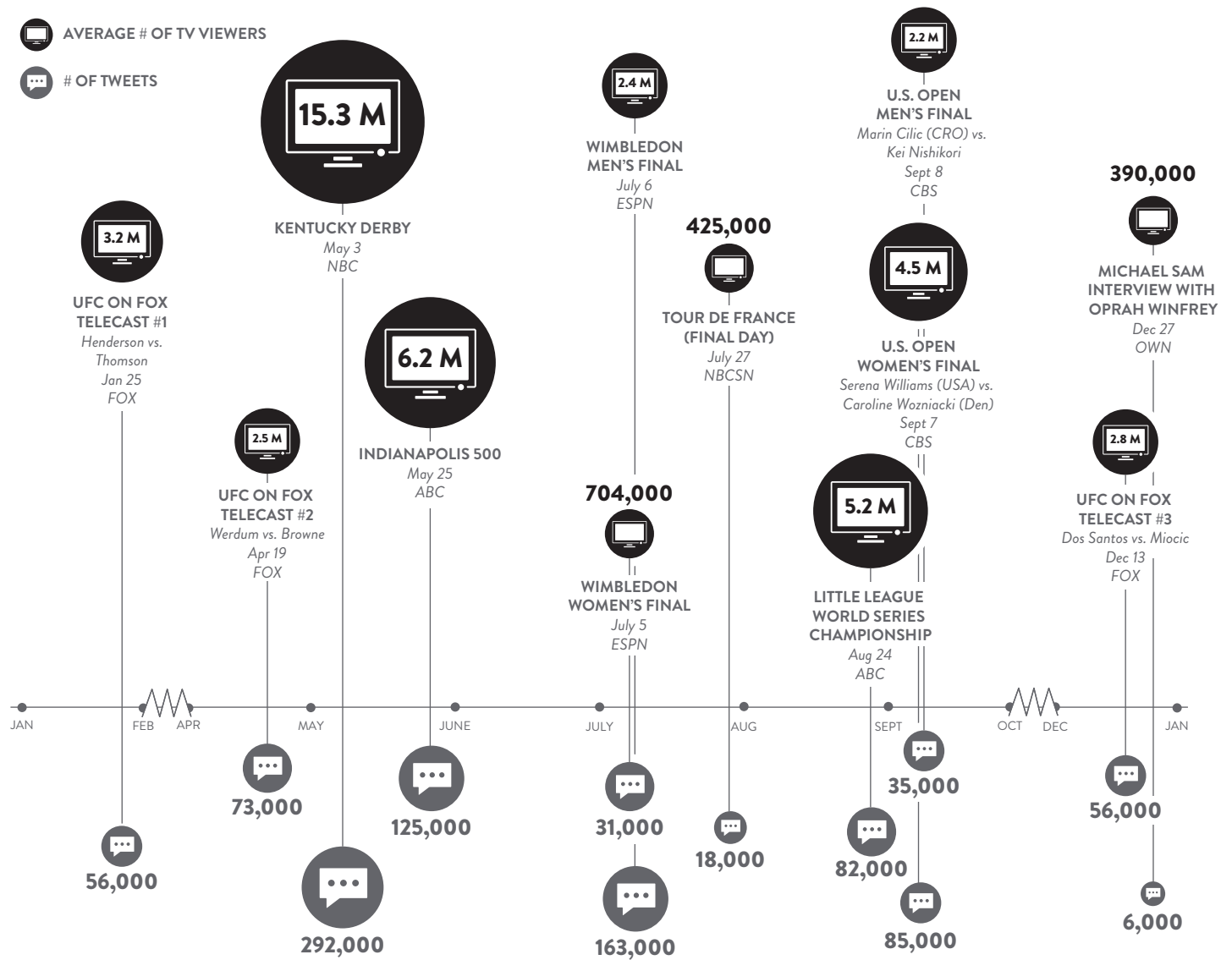
MediaMetrie/Eurodata TV Worldwide
Email: ygberhoun@eurodatatv.com



OTHER SPORTS PROGRAMMING

There was plenty of action in sports beyond the major leagues in 2014, and fans made sure to watch. Indy Racing League, for instance, hit a 3-year high on NBCSN with 378,000 viewers over the course of the season, a 30% increase from 2012. Over in tennis, Serena Williams and Caroline Wozniacki's final face-off was an ace in ratings that beat out the men's tennis final by more than 2 million viewers. And although the players in the Little League Championship Game might be tiny, their ratings weren't--more than 5.2 million Americans tuned in to watch!

TIMELINE OF YEARLY HIGHLIGHTS



THE YEAR OF DIGITAL VIEWING

- The Rise of Technology: Smartphone device penetration=Nielsen Mobile Insights, P13+; Broadband, Tablet, SmartTV=Nielsen NPower/NPM Panel, P2+
- Smartphones and the Sports Fan: Nielsen Electronic Mobile Measurement, Aug 1 2012 – Oct 31 2014. P18+
- Smartphone Apps Used: Nielsen Electronic Mobile Measurement, Aug 1 – 31 2014
- Top Apps by Minutes: Nielsen Electronic Mobile Measurement, Jan 1 – Oct 31 2014
- The Computer is Giving Way to Mobile in Sports: Nielsen Netview, Aug 1 2012 – Oct 31 2014
- Avid Sports Fans Are Super Consumers of Sports:
 1. *Mobile: Nielsen Electronic Mobile Measurement, July 1 – Sept 30 2014. Sports quintiles are grouped based on users' time per person per month consuming sports-related media on a smartphone. It refers to those individuals who visit a website or use a mobile app specifically designed for sports.*
 2. *Internet: Nielsen Netview, July 1 – Sept 30 2014. Sports quintiles are grouped based on users' time per person per month consuming online sports-related media on a computer. It refers to those individuals who visit a website specifically dedicated to sports.*
- Streaming and the Sports Fan: Nielsen Video Census, Oct 1 2013 - Oct 31 2014
- Fantasy Football: Nielsen Netview, Sept 1 – 30, 2013, Sept 1 – 30, 2014. Nielsen Electronic Mobile Measurement, Sept 1 – 30 2013, Sept 1 – 30 2014
- Who's Listening on Radio?: TAPSCAN™ Web National Regional Database, Spring 2014.

OLYMPICS

- Intro Summary:
 1. *Nielsen Social, Feb 15, 2014*
 2. *Total Cross-Platform Hours of Programming: NBC Universal's Total Audience Measurement Index*
- Timeline: Nielsen National TV Toolbox, Feb 7 – Feb 23 2014, P2+ and Live+SD
- The Olympics on TV:
 1. *Reach: National TV Toolbox, Feb 10 – 26, Feb 12 – 28 2010, Feb 7 – Feb 23, 2014, P2+ and Live+7, 6-min qualifier*
 2. *Average Audience: National TV Toolbox, Feb 10 – 26, Feb 12 – 28 2010, Feb 7 – Feb 23, 2014, P2+ and Live+SD*
- The Olympics on Digital Platforms:
 1. *Hours Consumed and Unique Visitors: Adobe Analytics*
 2. *Nielsen ad campaigns: From February 6-23, 2014 (Opening ceremony-Closing Ceremony), Nielsen measured five advertising campaigns that ran on TV (NBC, MSNBC, NBC Sports Network), online (nbcolympics.com) and mobile ("Olympics Live Extra" iOS app and the "Scores and Highlights" iOS app; NBC server-side Android impressions). The pilot incorporated Nielsen Online Campaign Ratings mobile pilot data, as well as an online survey that polled 1,000 people about viewing, time spent and reach by platform to generate cross-platform de-duplication.*
- Hockey's Streaming Hat-Trick: Adobe Analytics

WORLD CUP

- Timeline:
 1. *TV Viewers: Nielsen National TV Toolbox, June 2014 – July 2014, P2+ and Live+SD; Game telecasts only*
 2. *Social: Nielsen Social, June 2014 – July 2014.*
- World Cup on TV: June 2006 – July 2006, June 2010 – July 2010, June 2014 – July 2014, P2+ and Live+SD, 6 min qualifier.
- Top Advertisers: Nielsen Monitor Plus, Q4 2013 – Q3 2014, National TV.
- Univision Digital Viewing: Conviva Live Stream Analytics, June 11, 2010 to July 11, 2010, Adobe Analytics, Desktop+Mobile Browser and Univision Deportes App Traffic, US+PR, June 12 to July 13, 2014. App downloads from Distimo, US Only, June 12 to July 13, 2014.
- WatchESPN: Adobe Analytics

NFL

- Timeline:
 1. *TV Viewers: Nielsen National TV Toolbox, Jan 2014 – Jan 2015, P2+ and Live+SD*
 2. *Social: Nielsen Social, Jan 2014 – Jan 2015.*
- Will Katy Perry Score a Touchdown at the 2015 Super Bowl?: Nielsen Soundscan, Jan – March 2004, Jan 6 – Feb 25 2008, Jan 4 – Feb 23 2009, Jan 10 – March 1 2010, Jan 9 – Feb 28 2011, Jan 8 – Feb 27 2012, Jan 6 – Feb 25 2013, Jan 5 – Feb 24 2014. *4 weeks preceding always includes day of Super Bowl.
- Local Market Insights: Scarborough USA Release 2 2014, P18+
- Fan Insights: Scarborough USA+ Release 2, 2014, P18+ (beer consumption measured among P21+)
- Top Advertisers: Nielsen Monitor Plus, Q4 2013 – Q3 2014, National TV.

NBA

- Timeline:
 1. *TV Viewers: Nielsen TV, Feb 2014 – Dec 2014, P2+ and Live+SD*
 2. *Social: Nielsen Social, Feb 2014 – Dec 2014*

- The NBA's Multicultural Audience: Nielsen National TV Toolbox, Oct 2003 – April 2004, Oct 2010 – April 2011, Oct 2013 – April 2014, P2+ and SD, 6 min Qualifier
 1. *Networks included: ABC, ESPN, ESPN2, TNT, NBA-TV*
- Local Market Insights: Scarborough USA Release 2 2014, P18+
- Fan Insights: Scarborough USA+ Release 2, 2014, P18+
- Top Advertisers: Nielsen Monitor Plus, Q4 2013 – Q3 2014, National TV.

MLB

- Timeline:
 1. *TV Viewers: Nielsen National TV Toolbox, March 2014 – Oct 2014, P2+ and Live+SD*
 2. *Social: Nielsen Social, March 2014 – Oct 2014.*
- Intro Summary: Arianna, March 2014 – Oct 2014, P2+ and Live+SD
- MLB FANBASE FOUND OUTSIDE OF TRADITIONAL MARKETS. Nielsen National TV Toolbox, May & July 2013, May & July 2014, P2+ and Live+SD, 6 min Qualifier. Analysis done in conjunction with Luker On Trends.
- Local Market Insights: Scarborough USA Release 2 2014, P18+
- Fan Insights: Scarborough USA+ Release 2, 2014, P18+
- Top Advertisers: Nielsen Monitor Plus, Q4 2013 – Q3 2014, National TV.

NHL

- Timeline:
 1. *TV Viewers: Nielsen National TV Toolbox, Jan 2014 – May 2014, P2+ and Live+SD*
 2. *Social: Nielsen Social, Jan 2014 – May 2014.*
- Intro Summary: Arianna, May 2014, P2+ and Live+SD
- THE NHL STADIUM SERIES – INVITING NEW FANS INTO THE TENT. Nielsen TV Toolbox, Jan 2014 – March 2014, P2+ and Live+SD, 6 min Qualifier. Arianna, Jan 2014 – March 2014, P2+ and Live+SD.
- Local Market Insights: Scarborough USA Release 2 2014, P18+.
- Local Market Insights: Nielsen Talent Analytics.
- Fan Insights: Scarborough USA+ Release 2, 2014, P18+
- Top Advertisers: Nielsen Monitor Plus, Q4 2013 – Q3 2014, National TV.

SOCCER

- Timeline:
 1. *TV Viewers: Nielsen National TV Toolbox, March 2014 – December 2014, P2+ and Live+SD*
 2. *Social: Nielsen Social, March 2014 – December 2014.*
- Intro Summary: Arianna, May 2014, P2+ and Live+SD
- RICH SOCCER FANS HAVE OPEN WALLETS: Scarborough USA+ Release 2, 2014, P18+. 2014 Games 360 Survey, P13+. Soccer fans responded
- Local Market Insights: Scarborough USA Release 2 2014, P18+.
- Local Market Insights: Nielsen Talent Analytics.
- Fan Insights: Scarborough USA+ Release 2, 2014, P18+
- Top Advertisers: Nielsen Monitor Plus, Q4 2013 – Q3 2014, National TV.

NASCAR

- Timeline:
 1. *TV Viewers: Nielsen National TV Toolbox, Feb 2014 – Nov 2014, P2+ and Live+SD*
 2. *Social: Nielsen Social, Feb 2014 – Nov 2014*
- NASCAR Fan Favorites: Nielsen Talent Analytics
- Social Media Insights: Nielsen Social, Sep 2014 – Nov 2014.
- Fan Insights: Scarborough USA+ Release 2, 2014, P18+
- Top Advertisers: Nielsen Monitor Plus, Q4 2013 – Q3 2014, National TV. *NASCAR Sprint Cup only.

GOLF

- Timeline:
 1. *TV Viewers: Nielsen National TV Toolbox, March 2014 – Aug 2014, P2+ and Live+SD*
 2. *Social: Nielsen Social, March 2014 – Aug 2014*
- Intro Summary: Nielsen National TV Toolbox, Aug 11, 2013, Aug 10, 2014, P2+ and Live+SD.
- Rory McIlroy Resonates with Younger Golf Fans: Nielsen Talent Analytics, Simmons Research (2014), Nielsen Household Demographics (2014)
- LPGA Insights: Nielsen National TV Toolbox, March 2014 – Aug 2014, P2+ and Live+SD June 27-30, 2013, June 20-22, 2014. Nielsen Talent Analytics.
- Fan Insights: Scarborough USA+ Release 2, 2014, P18+
- Top Advertisers: Nielsen Monitor Plus, Q4 2013 – Q3 2014, National TV.

NCAA BASKETBALL

- Timeline:
 1. *TV Viewers: Nielsen National TV Toolbox, March 2014 – April 2014, P2+ and Live+SD*
 2. *Social: Nielsen Social, March 2014 – April 2014.*
- Intro Summary: Nielsen National TV Toolbox, April 9, 2013, April 8, 2014,, P2+ and Live+SD.
- Who's Watching College Basketball?:
 1. *Men's: Nielsen National TV Toolbox, Nov 2013 – March 2014, P2+ and Live+SD. Networks: ABC, CBS, FOX, TNT, TruTV, NBCSN, FS1, FS2, ESPNU, ESPN2, ESPN*
 2. *Women's: Nielsen National TV Toolbox, Oct 2013 – March 2014, P2+ and Live+SD, Networks: CBS, ESPN, ESPN2, FS1, FS2.*
- Local : Nielsen National TV Toolbox, March 2014 – Aug 2014, P2+ and Live+SD June 27-30, 2013, June 20-22, 2014. Nielsen Talent Analytics.
- Fan Insights: Scarborough USA+ Release 2, 2014, P18+
- Top Advertisers: Nielsen Monitor Plus, Q4 2013 – Q3 2014, National TV.

NCAA FOOTBALL

- Timeline:
 1. *TV Viewers: Nielsen National TV Toolbox, Dec 2014 – Jan 2015, P2+ and Live+SD*
 2. *Social: Nielsen Social, Dec 2014 – Jan 2015.*
- Intro Summary: Nielsen National TV Toolbox, Dec 2014 – Jan 2015, P2+ and Live+SD.
- Play-off Format vs. Bowl Games: Nielsen National TV Toolbox, Dec 2013 – Jan 2014, Dec 2014 – Jan 2015, P2+ and Live+SD
- Local Market Insights: Scarborough USA Release 2 2014, P18+.
- Fan Insights: Scarborough USA+ Release 2, 2014, P18+
- Top Advertisers: Nielsen Monitor Plus, Q4 2013 – Q3 2014, National TV.

GLOBAL VIEW:

Source: Yearly Sports Key Facts 2013/2014 - Eurodata

TV Worldwide/Relevant Partners

Period: September 2013 - August 2014

- OzTAM (Australia), Numéris (Canada), Médiamétrie (France), AGF / GfK Fernsehforschung (Germany), SAARF / Nielsen TV Audience Measurement (South Africa), Video Research Ltd (Japan), tvview (UAE), Nielsen TV Audience Measurement (Philippines, Thailand, Venezuela, Serbia, Poland, South Korea), Auditel (Italy), Video Research (Japan), TNS Gallup (Norway, Russia), SKO Stichting KijkOnderzoek (Netherlands), BARB / Kantar Media UK (UK), Ibope Media (Argentina, Brazil, Costa Rica, Colombia, Mexico), CIM / GfK Audimétrie (Belgium), SAARF / Nielsen TV Audience Measurement (South Africa), SKO Stichting KijkOnderzoek (Netherlands)

OTHER SPORTS PROGRAMMING:

- TV Ratings: Nielsen National TV Toolbox, Jan – Dec 2014, P2+ and Live+SD
- Social: Nielsen Social, Jan – Dec 2014

Miscellaneous:

Nielsen Social Activity metrics (Unique Authors and Tweets) are a measure of relevant Twitter activity from three hours before, during and three hours after a TV event's broadcast, local time. Reach metrics (Unique Audience and Impressions) measure the audience of relevant Tweets ascribed to an episode from when the Tweets are sent until the end of the broadcast day at 5am.

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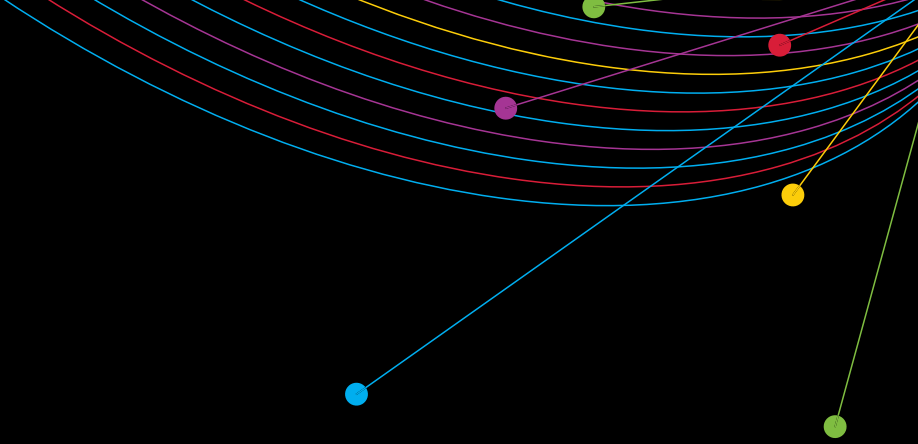
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ABOUT NIELSEN

Nielsen Holdings N.V. (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence, mobile measurement. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands.

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