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YEAR IN SPORTS MEDIA REPORT

2016



YEAR IN SPORTS MEDIA REPORT 2016



STEPHEN MASTER

Regional Head of Revenue
Nielsen Sports

Welcome to Nielsen's Year in Sports Media 2016 Report, a compilation of media highlights, advertising and sponsorship trends and consumer insights across leading sports properties. This year, Nielsen Sports' "FANALYTICS" platform – what we refer to as the collective intelligence and insights around sports consumers – continued to evolve. With the addition of Repucom and Pointlogic's solution portfolios, we are now even better positioned to help our clients gain a deeper understanding of the sports fan.

In many respects, 2016 was a challenging year off the field, as we lost some of the most iconic legends in the sports world, including Arnold Palmer, Muhammad Ali, Pat Summitt and Gordie Howe. Additionally, we endured a challenging political season that garnered many headlines, including Brexit and the U.S. presidential election. And yet, despite all of the tumult, when we turned to sports for salvation (or escape), sports delivered some of the finest moments and most indelible images of 2016.

UNQUESTIONABLY, THE MOST HISTORIC EVENT OF 2016 WAS SOMETHING ALMOST NO ONE ALIVE HAD WITNESSED BEFORE:

In a thrilling series, which saw a meeting between two franchises that hadn't won a World Series in a combined 168 years, the Chicago Cubs and Cleveland Indians stepped up to the plate to deliver a true Fall Classic. Despite trailing three games to one, the Cubs rallied to break the curse. An average of over 40 million viewers tuned in to watch an epic Game 7, in what will certainly be remembered as one of the most iconic games in MLB history. The Cubs' run to their first championship in 108 years captured the imagination of the country, as Game 7 was the most-watched MLB

game in 25 years and had an audience 71% greater than Game 7 of the World Series in 2014.

In Rio this summer, Team USA enjoyed another dominating Olympics in the pool, at the track and on the gymnastics floor, winning an astounding 121 medals. NBC treated Olympics fans to an incredible 6,755 hours of content, including 2,084 hours on linear television and over 4,500 hours streamed digitally. Although the average primetime audience was down versus the London 2012 Games, close to 80% of U.S. TV homes tuned in to the Rio Games, as it reached 198 million viewers on TV alone.

It was also a busy summer on the pitch, as Leicester City completed the seemingly impossible, overcoming 5,000-to-1 odds to win the Premier League. While Leicester City was the club that stole many of the headlines, Cristiano Ronaldo and Lionel Messi continued to cement their legacies as superstars. Each player led his respective country to the finals of the 2016 Euros and the Copa America Centenario. U.S. soccer fans tuned in at a high rate, as the Euros final drew 5.3 million average viewers and the Copa America 8.7 million, up 593% from the Copa America Final in 2015. In addition, Ronaldo and Messi continued to grow their personal brands and enjoyed high levels of marketability, as they share the highest N-Score (67) among active male soccer players.

“DESPITE THE PROLIFERATION OF DEVICES AND UNPRECEDENTED MEDIA FRAGMENTATION, SPORTS PROGRAMMING CONTINUES TO THRIVE..”

Stephen Curry won the MVP award in a unanimous vote while leading the Golden State Warriors to the best record (73 – 9) in NBA history. However, the 2015-16 season will be most remembered for LeBron James' heroics in the Finals, as he helped Cleveland finally end its 52-year championship drought. In a rematch of the prior year's Finals, the Cavaliers–Warriors sequel was even better than the original, as close to 31 million viewers tuned in to Game 7. In fact, the 2016 series was the most-watched NBA Finals since Michael Jordan's Bulls won their last championship 18 years earlier. While James' marketability suffered a hit when he first took his talents to South Beach, it has soared since he's returned to his hometown. His current N-Score of 78 is the highest in the NBA.

Led by rookies Dak Prescott and Ezekiel Elliott, the resurgence of the Dallas Cowboys was the biggest storyline of the NFL regular season. The NFL's TV ratings challenges also drew headlines, but perhaps the league just needed to put the Cowboys in the national TV window every week, as they proved once again to be "America's Team." Dallas played in four of the top five most-watched games this season, including their Thanksgiving game (35.1 million viewers), which was the most viewed NFL regular-season game in FOX's history. The Cowboys' thrilling playoff game against the Packers drew 45 million viewers, and was the most-watched divisional playoff game in NFL history. However, with the Cowboys' early exit in the playoffs, Tom Brady and the Patriots became yet again the focus of the NFL postseason, as Brady deflated the Falcons with an epic comeback seen by an average audience of 111.3 million viewers.

The college football season reaped the benefits of having some traditional football powers enjoy a resurgence, including Michigan, USC and Penn State. Like the NBA, college football fans were given a rematch in the championship, as Alabama and Clemson squared off. Part II of this rivalry proved even more dramatic, as Deshaun Watson secured the Tigers' first championship in 35 years on the final play. Although the 25 million viewers for the 2016 championship game was down slightly from the prior year (-3%), college football fans still seemed to enjoy tuning in for bowl season, as the New Year's Six bowls averaged over 13 million viewers per game, up 13% from last season.














If sports in 2016 taught us anything, it's that despite the proliferation of devices and unprecedented media fragmentation, sports programming continues to thrive. As connectivity rises, connections suffer, but sports provide an ideal vehicle for brands to integrate with content and reach passionate consumers. More than 8,000 parent brands were tracked in Nielsen's North American Sport24 syndicated sponsorship media valuation database, garnering \$7.4 billion in Q1 Media value. Gatorade led all brands tracked in Sport24, with a presence across every major league and an amazing 53% of its exposure value coming from NFL game broadcasts. State Farm received the second-highest Q1 Media Value, with 75% of it coming from NBA broadcasts.

I hope you enjoy these highlights from across Nielsen's wealth of consumer and media insights. 2016 continued to prove that sports content across all media platforms continues to flourish and prosper!

Stephen Master

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THE SCIENCE BEHIND WHAT'S NEXT

Nielsen Sports is committed to placing a greater emphasis on understanding the science behind “what’s next,” as it relates to measuring fans’ consumption behavior, monetizing content across platforms and creating deeper partnerships across the sports ecosystem. Rapidly evolving technology and access to increasingly sophisticated fan data is allowing properties, brands,

media companies and the athletes themselves to more effectively engage fans. As Nielsen Sports’ “FANALYTICS” platform continues to grow, we have highlighted five key commercial trends that shaped the North American sports marketing landscape in 2016 that we will be closely watching in 2017.

1. ESPORTS HAVE EVOLVED FROM NICHE TO MAINSTREAM



THE U.S. ESPORTS
FAN BASE GREW TO

45.3
MILLION PEOPLE

compared with 25.7 million in 2015

The world of competitive gaming dramatically expanded its U.S. footprint in 2016 with an unprecedented level of investment and enormous growth in interest and fans. The 2016 Nielsen eSports Report shows that the U.S. eSports’ fan base grew to 45.3 million people, compared to 25.7 million in 2015 (+76%). Almost 24%, or 10.9 million eSports enthusiasts, consider themselves avid eSports fans and engage with the sport at least 5 hours per month. Not surprisingly, 83% of the avid eSports fans are male, and 78% of them are between the ages of 13 – 34.

SPONSORSHIP INVESTMENT FROM BLUE CHIP BRANDS

The 2016 Nielsen eSports Report shows that almost 60% of avid eSports fans have a household income of over \$50,000, and 85% of eSports fans 21+ have attended college. Coupling the facts that avid eSports fans are predominately young males who are highly educated and have high disposable incomes has resulted in the sport attracting significant investment from non-endemic, blue-chip brands including Coke, Audi and Anheuser-Busch.

ESPORTS ON CAMPUS

Michigan vs. Ohio State has been considered the biggest rivalry on the football field, but it will be interesting to see how their rivalry plays out in the eSports arena. Collegiate eSports are receiving large financial investments and resources from major college conferences, including the Big 10 and Pac-12. This makes sense given the fact that the college age demo, persons 18–34, makes up 33% (3.6 million) of avid eSports fans. Top players are receiving college scholarships, and through partnerships with game publishers, college conferences are creating season-long and conference championship competitions. All of these events will be broadcast on linear TV and streamed digitally.

ESPORTS SHOWS CROSSOVER APPEAL

There is a great deal of overlap between fan bases, as NBA fans are 114% more likely than the general population to be eSports fans. This means that while the Miami Heat tip off against the Philadelphia 76ers, it is possible that plenty of fans will be engaged in another matchup between the Misfits and Team Dignitas, who are owned by each NBA franchise respectively. Investment in eSports teams by other traditional team sports owners and former athletes is a trend that will continue to strengthen the business of eSports. These investors will bring their expertise in sponsorship, media, merchandising and ticket sales to the eSports ecosystem.

NEW SOURCE OF CONTENT/ PROGRAMMING FOR TRADITIONAL MEDIA

While Twitch is the platform of choice for fans to engage with eSports content, other more “traditional” media companies have successfully jumped into the fray, giving eSports a broader platform to reach new fans. In 2016, Turner Sports partnered with WME-IMG to form ELeague, whose top telecast saw 402,000 viewers on November 18, 2016. ESPN also launched a dedicated eSports vertical earlier this year. The network’s efforts to cover it like any other traditional sport has paid off, as 20% of fans consider it a “go-to source” for eSports news.

2. RICHER, DEEPER PARTNERSHIPS ACROSS THE SPORTS ECOSYSTEM BUILT AROUND CONTENT

When Kevin Durant decided to leave the Oklahoma City Thunder to join the Golden State Warriors, he personally explained his decision to fans through the Players' Tribune. The proliferation of new sites and technologies has allowed athletes to control their message and engage with their fans directly. Athletes are also using social media to build and monetize their personal brands by curating content and organically integrating sponsorship and endorsement messages.

TEAMS AND BRANDS LEVERAGE SOCIAL MEDIA

Teams and leagues are becoming more effective at leveraging their large social media followings to deepen their partnerships with brands. Nielsen Sports did an in-depth analysis across U.S. leagues and teams, which showed that the top 20 most active sponsors earned an aggregate of \$2.5 to \$3 million dollars of media value per team over the course of the season through controlled social media accounts. While Facebook is the top valued platform due to its large follower base, Instagram proves to be the most efficient platform in driving sponsorship value. Twitter shows the lowest value, which is primarily due to the quick refresh of content that prohibits large impression numbers.

AVERAGE SPONSORSHIP VALUE PER POST



\$2,723
INSTAGRAM



\$2,108
FACEBOOK

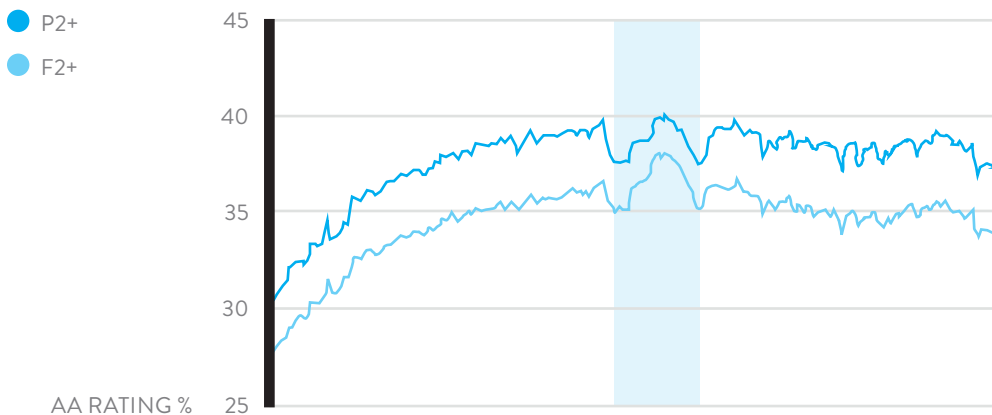


\$421
TWITTER

THE FUSION OF ENTERTAINMENT AND SPORTS

Many brands have also benefited from the crossover of entertainment and sports. While iconic music acts have been playing at the Super Bowl and other major sporting events for a long time, sponsors have become more effective with marketing channels such as social media to integrate and wrap their brands around content. This is reflected in the engagement from fans. The ten most-watched minutes of Super Bowl 50 were the Pepsi Halftime Show. In addition, #pepsihalftime ranked in the top 10 hashtags used on Twitter in conversation surrounding the game. This hashtag was included in three times as many Tweets as #formation, the title of Beyonce's song premiered during the show.

AVERAGE AUDIENCE MINUTE-BY-MINUTE RATING DURING SUPER BOWL 50



We can see ratings drop immediately after the first half ends, and then come back to a peak during the halftime show, particularly for females.

TEAMS FORM DEEPER RELATIONSHIPS THROUGH EXCLUSIVE CONTENT

Sports properties are also showcasing behind-the-scenes action and events beyond their core games to form deeper relationships with fans. In lieu of just posting the recruiting class on its website, or sending out a press release, Michigan football coach Jim Harbaugh aligned with the Players' Tribune to create a "Signing of

the Stars" event. This allowed fans to engage with the team and its new recruits in a more unique and creative way. The program integrated its sponsors and raised significant dollars and awareness for the ChadTough Foundation. This type of direct, unfiltered communication is forming deeper relationships off the playing field throughout the sports ecosystem.

3. OTT, SOCIAL MEDIA AND OUT-OF-HOME VIEWING CREATING A TRULY OMNICHANNEL ENVIRONMENT

Device proliferation, media fragmentation and evolving consumer habits are rapidly transforming the media business. And although it is more complex, overall media consumption across devices grew 13% in 2016.

MEASURING CONSUMPTION AND THE TOTAL AUDIENCE ACROSS EVERY DEVICE

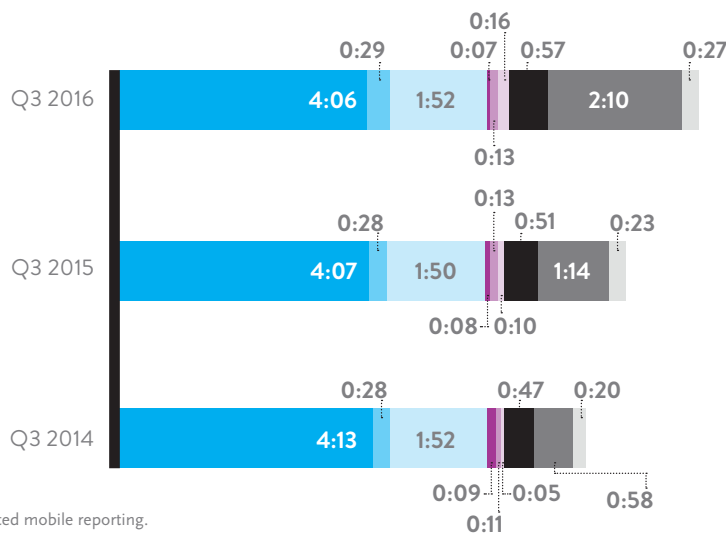
Fans are still engaging with sports in large numbers, but technology has enabled them to step out of their living room and consume content in new ways. While time spent watching live television is down across all demos except P50+, time spent on PCs (internet),

smartphones (app/web) or tablets (app/web) has increased substantially.

Declines in live TV usage among U.S. adults display signs of slowing. According to the 2016 Nielsen Total Audience Report for Q3, U.S. adults spent an average of 4 hours and 6 minutes tuning into live TV per day, about 1 minute less than in Q3 2015, and about 7 minutes less than in Q3 2014. Meanwhile, time spent on PCs, smartphones or tablets has increased substantially (+45%). The one medium that has remained steady is radio, as it still accounts for a significant portion of the total media consumption.

AVERAGE TIME SPENT PER ADULT 18+ PER DAY

- LIVE TV
- DVR/TIME-SHIFTED TV
- AM/FM RADIO
- DVD/BLU-RAY DEVICE
- GAME CONSOLE
- MULTIMEDIA DEVICE
- INTERNET ON PC
- APP/WEB ON SMARTPHONE
- APP/WEB ON TABLET



Panel enhancements made in March and August 2016 impacted mobile reporting.

MILLENNIALS HAVE OFFICIALLY BECOME THE MOBILE-FIRST GENERATION

According to the 2016 Nielsen Total Audience Report for Q3, on average, U.S. adults ages 18-24 spent over 57 hours per week consuming media. **Over 20 hours (35.6%) of their media time was spent on their smartphones, while 15.5 hours (27.1%) was spent watching TV. This was the first year that consumption on mobile devices surpassed television across any demo.** These consumption patterns will have many implications for the sports marketing industry moving forward, as leagues, teams and brands try to engage their younger fans. Smartphones are also being used as a “second screen,” with 30% of consumers using their smartphone several times a day while watching TV. Of those consumers using

their smartphone as a second screen, 25% of them are looking up information about athletes, teams, actors or plotlines.

OUT-OF-HOME DELIVERS SIGNIFICANT INCREMENTAL VIEWERS

As fans continue to gather with friends to watch their favorite teams play in the big games at bars or parties, Nielsen is capturing and measuring fans’ out-of-home viewing to ensure the total audience across screens is being counted. Many fans, particularly those 18–34, chose to watch the epic seven-game showdown between the Cavaliers and the Warriors outside of their home. ABC received a 17% lift in average P6+ viewership across the seven games of the NBA finals. This lift jumped to 25% among those 18–34.

4. EDGING CLOSER TO CRACKING THE CODE ON ROI

MEASURING SPONSORSHIP IMPACT

PRIOR TO SPONSORSHIP

2011
95 Penetration Index

In 2011, fans of this MLB team were **5% less likely** than the average household in their market to purchase a product from this spirits brand



AFTER SPONSORSHIP

2016
103 Penetration Index

In 2016, fans of this MLB team were **3% more likely** than the average household in their market to purchase a product from this spirits brand.

Despite the high stakes and investment in sponsorship marketing, precise measurement and attribution for sports sponsorship ROI remains elusive. However, using enhanced technology, sophisticated modeling and detailed fan behavioral and purchase data, Nielsen is leading the way in helping the industry crack the code on ROI.

UNDERSTANDING THE VALUE AND IMPACT OF A SPONSORSHIP INVESTMENT

One critical piece of measuring a brand's sponsorship impact is understanding whether the investment drove incremental sales among fans of that property. Linking sports media consumption, valuation data and consumer purchase information, Nielsen works with properties/brands to evaluate the return on sports marketing investments. A recent Nielsen study was focused on helping an MLB club and its spirits sponsor understand the value of the investment. The study showed the proportion of MLB fans of this club purchasing the sponsor spirits brands increased significantly over the five years of the partnership, indicating growth in penetration development among that team's fans and the success of the campaign.

OPTIMIZING MEDIA SPEND TO DRIVE TUNE-IN

Media fragmentation and the proliferation of devices are making it increasingly challenging for sports properties and media companies to understand the mix of marketing activities and channels that drive engagement and viewership. By matching Nielsen TV viewership and purchase data with the client's proprietary CRM behavior data, Nielsen Pointlogic is able to build advanced viewing models that optimize our clients' cross-platform campaigns and maximize viewership for upcoming games.

5. DATA BECOMING DRIVING FORCE IN OPTIMIZING FAN RELATIONSHIPS AND MAXIMIZING REVENUE

It is critical for sports properties to tailor messaging that will resonate most with fans in order to optimize the relationship.

DATA COLLECTION – BUILDING THE FAN COUNCIL

In partnership with Vision Critical, Nielsen works with leagues and teams to build online communities and strengthen their relationships with fans. The development of fan councils allows sports properties to recruit fans from their databases, and with a lens on specific segments, the property can engage with thousands of highly profiled fans. Through better use of technology and the creation of mobile apps, properties are able to collect enormous amounts of data and insights about their fans that were previously unavailable.

DATA SEGMENTATION – LINKING TO MARKETING CLOUD

The future of fan relationships will be characterized by a more direct and customized interaction, which is based on data-driven solutions. Building distinct fan segments that link to the Nielsen Marketing Cloud allows teams to build a deep profile of each segment, including media consumption, social media activity and offline purchase behaviors.

DATA APPLICATION – DRIVING PERSONALIZED APPROACH

Teams that effectively get a holistic understanding of each segment profile will be able to develop a more personalized marketing approach that resonates with fans. Most importantly, they will enhance overall fan satisfaction and more effectively monetize their fan base.



THE OLYMPICS

Despite trepidation and negative news surrounding Rio's preparation for the 2016 Summer Olympic Games, the city offered a spectacular setting and events went off without a hitch. This is unless you count Ryan Lochte's mess of his own making.

Not only was Rio 2016 a success on the ground, but it was also the biggest television event of the summer, captivating audiences for two weeks and reaching about 198 million unique viewers across nine television networks. The Olympics offered audiences an amazing opportunity to come together with 200+ countries and cheer for the athletes on Team USA and the incredible talent across the globe.



Michael Phelps and Team USA earn a gold medal in the 4x100m medley relay.

SWIMMING LAPS THE FIELD

The top-rated telecasts reflect the most-anticipated events among Summer Olympics fans, according to Nielsen's Sports360 research report. Rio's biggest night was August 9, when an average U.S. audience of 33 million watched the broadcast featuring Michael Phelps winning gold medals 20 and 21, and the U.S. women's gymnastics team winning gold in a dominating performance over Russia. When looking across various demographic groups, this list of events shifts. Boxing, fencing and tennis become some of the most anticipated events among Hispanics, Asian Americans and African Americans, respectively.

TOP 5 ANTICIPATED EVENTS

- 1 SWIMMING
- 2 GYMNASTICS (ARTISTIC & RHYTHMIC)
- 3 DIVING
- 4 TRACK & FIELD
- 5 VOLLEYBALL

BOLT LEADS TWITTER BUZZ

For key events during the Rio 2016 Games, TV viewership and social chatter would peak together as fans watched the events unfold. The effect was even more dramatic for those most newsworthy events, such as the Men's 100m Track & Field Final on August 14, when **Usain Bolt** became the first athlete to win three gold medals in this event.

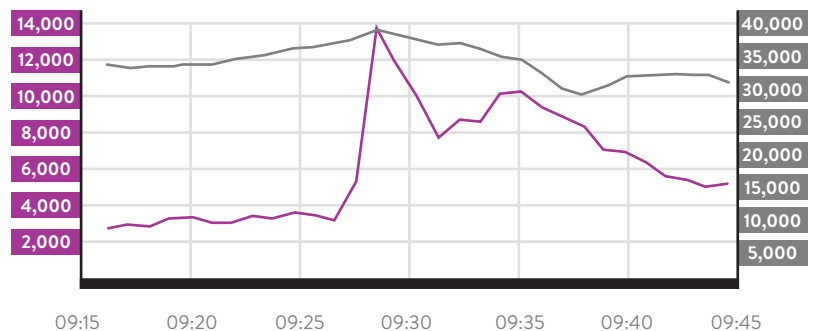
There were **nearly 14,000 Tweets** the minute following his race at 9:28pm, while the **average TV audience jumped to 38.4 million viewers**. For comparison, the entire primetime broadcast had an average of 26.8 million viewers.

MEN'S 100M TRACK & FIELD FINAL (PM)

USAIN BOLT GOLD MEDAL

TWEETS

P2+ AA PROJ (000)

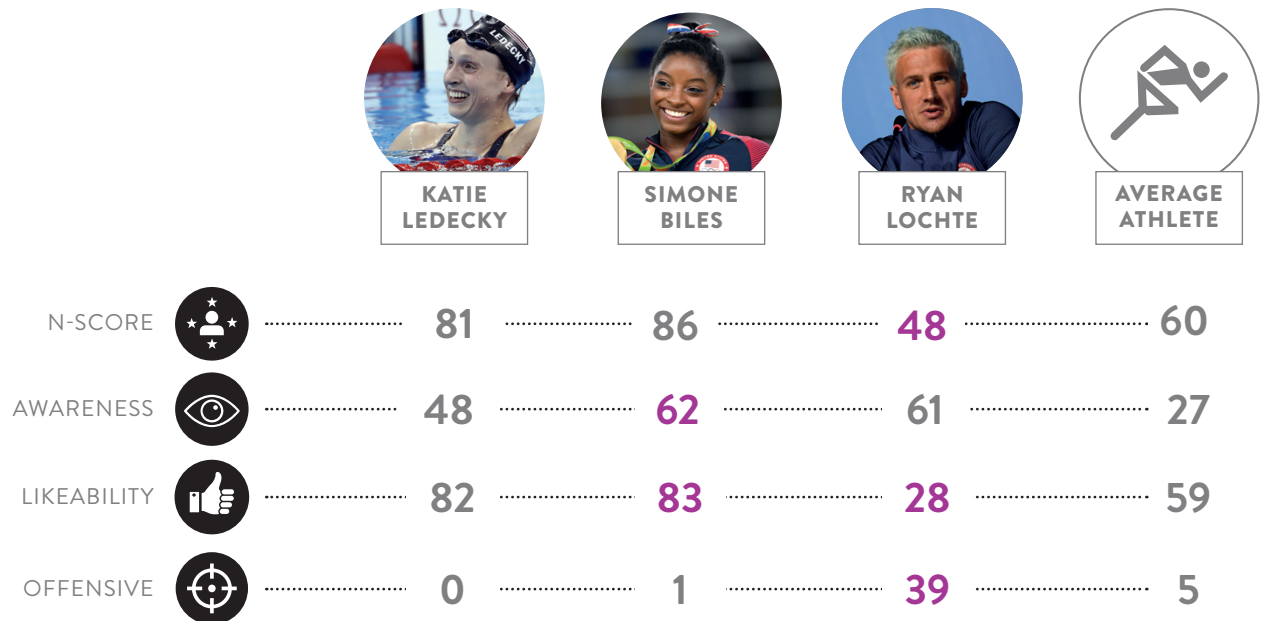


ENGAGEMENT WITH OLYMPIC ATHLETES RINGS STRONGER

Olympic athletes are perceived to have something more authentic and genuine about them than athletes in professional sports leagues. Their backstories are almost as important as their talent and presence at the games, which bodes well for the success of the Olympic Channel. According to Nielsen's Sports360 research report, 42% of avid Olympic fans are aware of who is competing in specific events prior to the Olympics, and 49% are more likely to cheer for athletes when they know their personal history.

The remarkable stories and successes of both Katie Ledecky and Simone Biles won over the American public. The Nielsen N-Scores for both women elevates them to professional athlete stars like Serena Williams (N-Score 82) and LeBron James (N-Score 78). On the other hand, Ryan Lochte's false report of events caused a sharp increase in his N-Score for offensive to 39, which surpasses the average athlete and even beats the offensive scores for Floyd Mayweather and Draymond Green.

NIELSEN TALENT ANALYTICS

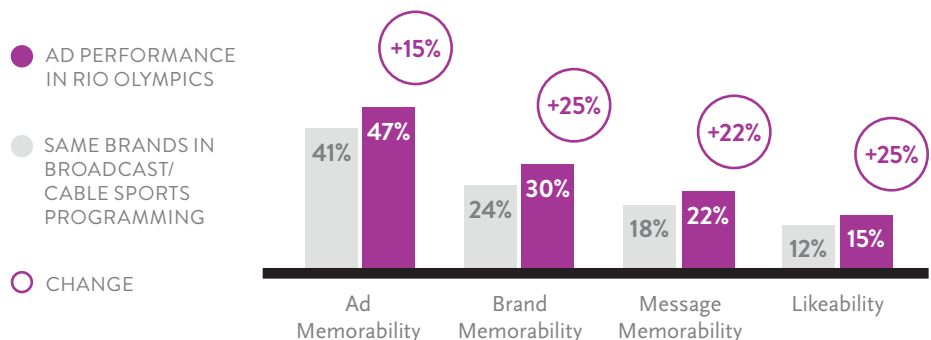


* Nielsen's N-Score Talent Tracker quantifies a celebrity's marketability, taking into account Awareness and Likeability, in addition to 10 other attributes such as: "Influential," "Stylish" and "Social Media Savvy." The weighted N-Score is on a scale of 1-100.

ADVERTISING GOLD

Fans of the Summer Olympics don't just pay attention to the competition and athletes. They also take note of commercials. When evaluating ad effectiveness, we see that ad memorability and brand memorability of ads within the Rio 2016 Olympics are about 15% and 25% more effective than the average sports programming ad outside of the Olympics.

AD PERFORMANCE COMPARISON





NFL

The NFL season ended in thrilling fashion, as Tom Brady led the New England Patriots to the greatest comeback victory in Super Bowl history. The improbable overtime win had an average audience of 111.3 million viewers, which was slightly down from the prior year due to viewers tuning out when the game was lopsided, as the Falcons led by as many as 25 points in the third quarter.

Despite widespread media coverage citing concerns on ratings performance, the NFL maintained its foothold as the most-watched programming with 90 regular-season games having a unique reach of over 25 million viewers. There was a 12% decrease in the number of average minutes viewed versus the prior year, as viewers diverted their time to news coverage leading up to the presidential election. Eight of the top 10 rated regular-season NFL games occurred after the 2016 presidential election.

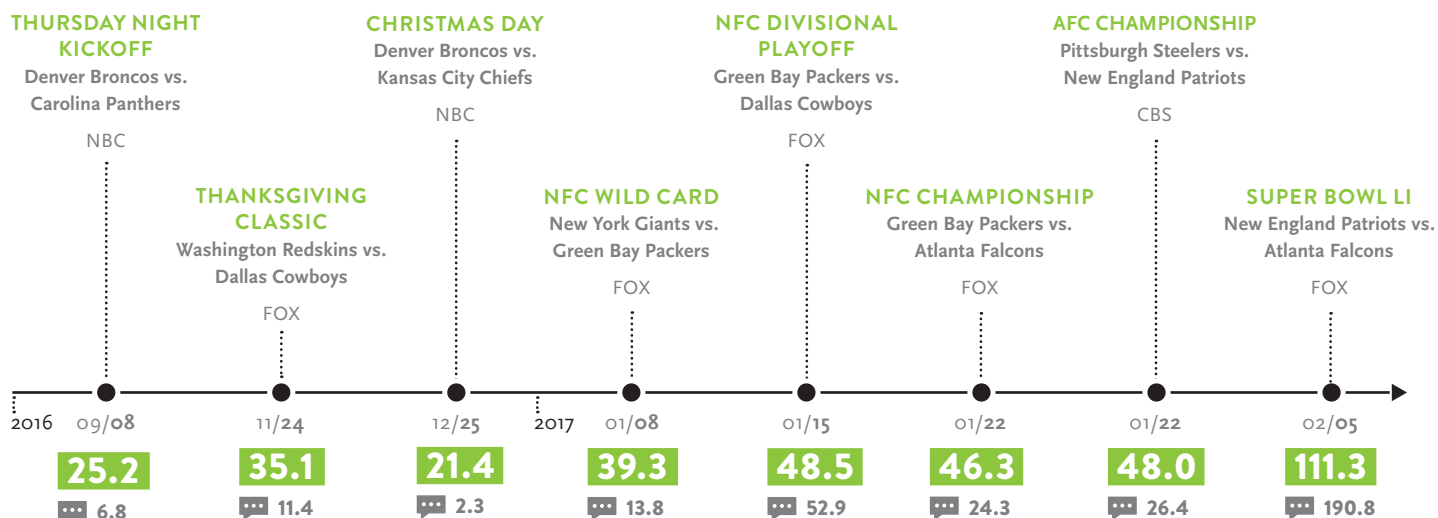


Tom Brady celebrates after the New England Patriots' victory over the Atlanta Falcons in Super Bowl LI.

TIMELINE OF TV VIEWERSHIP HIGHLIGHTS

AVERAGE # OF U.S. TV VIEWERS IN MILLIONS

SOCIAL TV INTERACTIONS IN MILLIONS



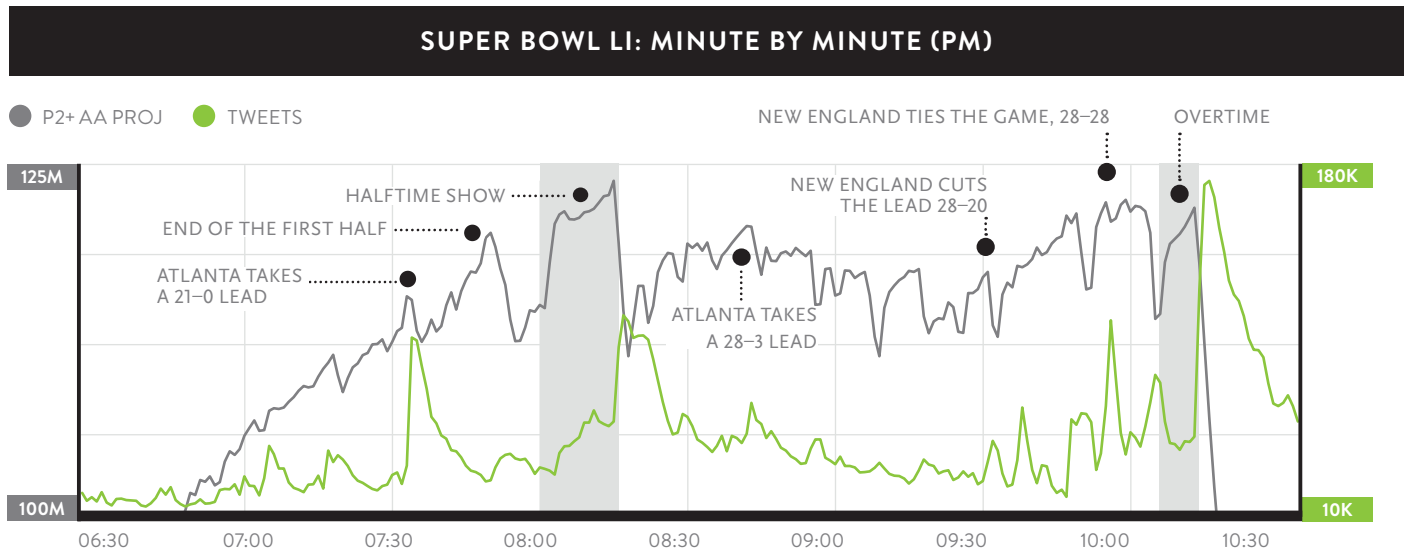
NFL DOMINATES FIRST AND SECOND SCREENS

The NFL owns Sundays on both television and social media. In fact, from September to November, 43% of weekly activity (related to TV programs) on Facebook and 33% on Twitter occurred on Sunday. Much of this social media activity can be attributed to NFL games. Super Bowl LI was no different, as it generated 190.8 million interactions, with 175.5 million on Facebook and 15.2 million on Twitter. Advertisers leveraged these platforms to gain incremental reach. Airbnb and Coca-Cola tweeted their ads and received 14,000 and 9,000 retweets respectively, which ranked in the top 40 among most retweets during the game.

The most viewed moment of the night was when 120.2 million people watched Lady Gaga's halftime performance. On the other

hand, conversation on social media reached its highest point when the Patriots won in overtime, as 7.5 million interactions occurred between 10:30pm and 10:34pm EST.

Throughout the game, the average TV audience would peak during key moments, and the number of social interactions would soon follow. However, there were some instances when social media interactions would peak while the average audience was at a relatively low point. This indicates that some viewers changed the channel during breaks in the action, but still used a second-screen device to remain engaged with the game. This happened in the moments following Lady Gaga's performance and between the end of regulation and start of overtime.



THE NFL GOES HOLLYWOOD

Fans in St. Louis seem to be sticking with the **Rams** despite their relocation at the start of the 2016 season. In fact, when looking at the same six games that were aired in both LA and St. Louis, ratings in LA were only marginally higher than in St. Louis (9.7 versus 8.3). The Rams averaged an 8.5 rating across all games in the LA market, which is the lowest home market rating for an NFL team.

It remains to be seen if the **Chargers'** relocation to LA will prove to be a success. The nine games of the 2016 season that were shown in LA drew a 6.2 local TV rating, while the same games drew an average rating of 24.6 in San Diego.

Further, the **Oakland Raiders'** TV ratings performance in the LA market came in at a 9.4, exceeding both the Chargers and Rams ratings in LA, despite the Raiders exploring a move to Las Vegas.

TOP ADVERTISERS

Q4 2015 - Q3 2016

- 1 VERIZON WIRELESS
- 2 McDONALD'S
- 3 DIRECTV
- 4 APPLE IPHONE
- 5 FORD F-150 TRUCKS



NBA

The Cleveland Cavaliers and Golden State Warriors monopolized the NBA season for the second year in a row. LeBron James finally led his home team to victory, as the Cavaliers took home their first-ever NBA championship. Averaging 31 million viewers nationally, the Cavaliers' victory over the Warriors ranked as the highest-rated NBA game ever on ABC, up 10% over Game 7 of the 2010 NBA Finals, which was previously the highest-rated NBA telecast on ABC to date.

Meanwhile, Stephen Curry led the Warriors to a record-breaking 73-win season. The game against the Memphis Grizzlies that broke the record earned a local rating of 24.2 in the San Francisco market, making it the highest locally rated regular-season game in team history. On the same day, the league said goodbye to a legend, as Kobe Bryant played his final game for the Los Angeles Lakers. His 60-point performance dominated the conversation on Twitter, with 1.1 million unique authors posting a total of 4.6 million Tweets about his final game.

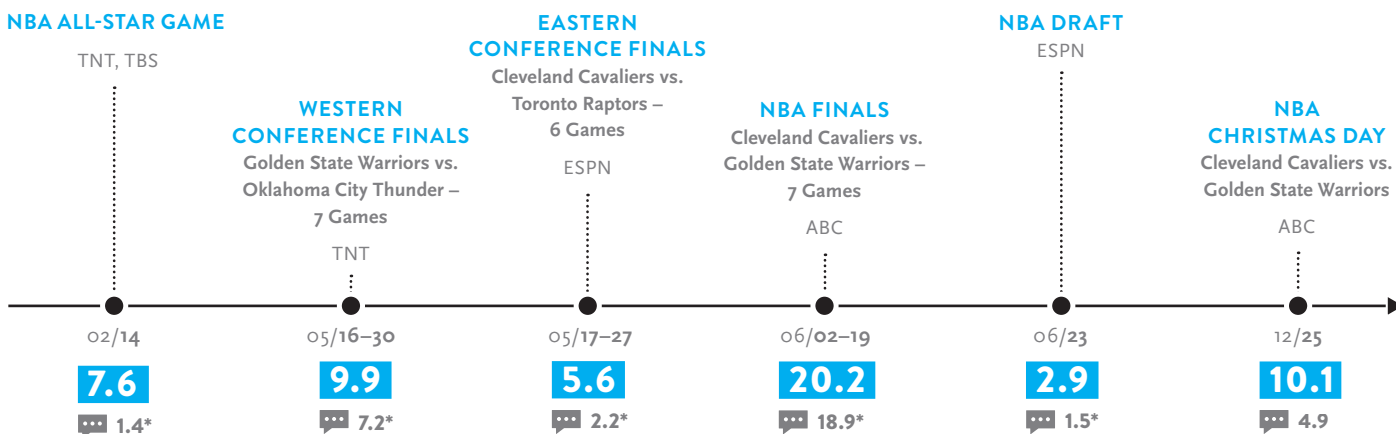


▶ LeBron James in action during Game 7 of the NBA Finals.

TIMELINE OF TV VIEWERSHIP HIGHLIGHTS

📺 AVERAGE # OF U.S. TV VIEWERS IN MILLIONS

💬 SOCIAL TV INTERACTIONS IN MILLIONS *Twitter only



Tweets were added up across all events in the Western Conference Finals, Eastern Conference Finals and NBA Finals.

GOLDEN STATE MAKES A MULTIMEDIA SPLASH

It should come as no surprise that the Golden State Warriors, Cleveland Cavaliers and Los Angeles Lakers take the top three spots for overall media exposure across TV, online and social

engagement for the 2015–16 regular season. These three teams were led by superstars who transcend basketball: Stephen Curry, LeBron James and Kobe Bryant.

NBA MULTIMEDIA RANKING: TOP 10						
	TEAM	LOCAL RSN RANKING	NATIONAL RANKING	SOCIAL RANKING	WEBSITE RANKING	APPEARANCE RANKING
1	GOLDEN STATE WARRIORS	1	1	1	1	2
2	CLEVELAND CAVALIERS	2	2	3	6	1
3	LOS ANGELES LAKERS	17	8	2	2	8
4	OKLAHOMA CITY THUNDER	4	4	4	14	3
5	SAN ANTONIO SPURS	3	3	6	4	6
6	CHICAGO BULLS	8	5	5	7	4
7	LOS ANGELES CLIPPERS	24	6	9	10	5
8	HOUSTON ROCKETS	18	9	8	22	7
9	MIAMI HEAT	5	10	10	16	9
10	BOSTON CELTICS	10	16	13	3	12

ARE POWER TEAMS GOOD FOR THE NBA?

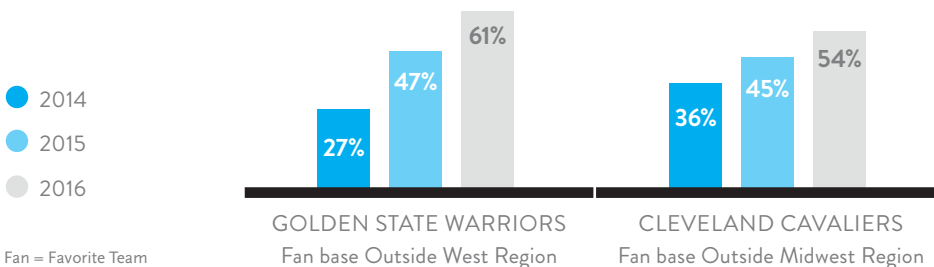
The Golden State Warriors and Cleveland Cavaliers continue to spark national interest and grow fan bases beyond their regions. When matched up against the Warriors or Cavaliers, opposing teams' local markets saw average lifts of 49% and 21%, respectively. For example, the Washington Wizards saw an average lift of 191% in the Washington, DC, market when playing the Warriors, whereas the Houston Rockets saw an average lift of 72% in the Houston market when playing the Cavaliers.

TOP ADVERTISERS

- 1 SAMSUNG GALAXY S7 EDGE
- 2 TACO BELL
- 3 AMERICAN EXPRESS
- 4 CORONA EXTRA
- 5 DIRECTV

FAN BASE OUTSIDE OF HOME REGION

HOW TO READ: IN 2016, 61% OF WARRIORS FANS WERE OUTSIDE OF THE WEST REGION





MLB

The 2016 World Series reached over 113 million viewers across the seven games, as the national interest in this year's Fall Classic was high. The Chicago Cubs hadn't won the title since 1908, and last made it to the Series in 1945. The Indians have only won two World Series championships—back in 1920 and 1948—and now have the longest current World Series championship drought.

Not only was the 2016 series the most-watched World Series since the Red Sox broke their curse in 2004, but the audience was younger than in recent years. The average 18-to-34-year-old audience for 2016 was 3.7 million, which was the highest 18–34 audience a series has seen since 2004. This younger 18–34 audience is also 76% higher than last year's series (2.1 million). This may have something to do with the young talent on the field, who have national marketing appeal and the potential to play deep into October for a number of years in the future. This is positive news for the MLB, who is aggressively trying to lower its average TV audience age and engage with younger fans.

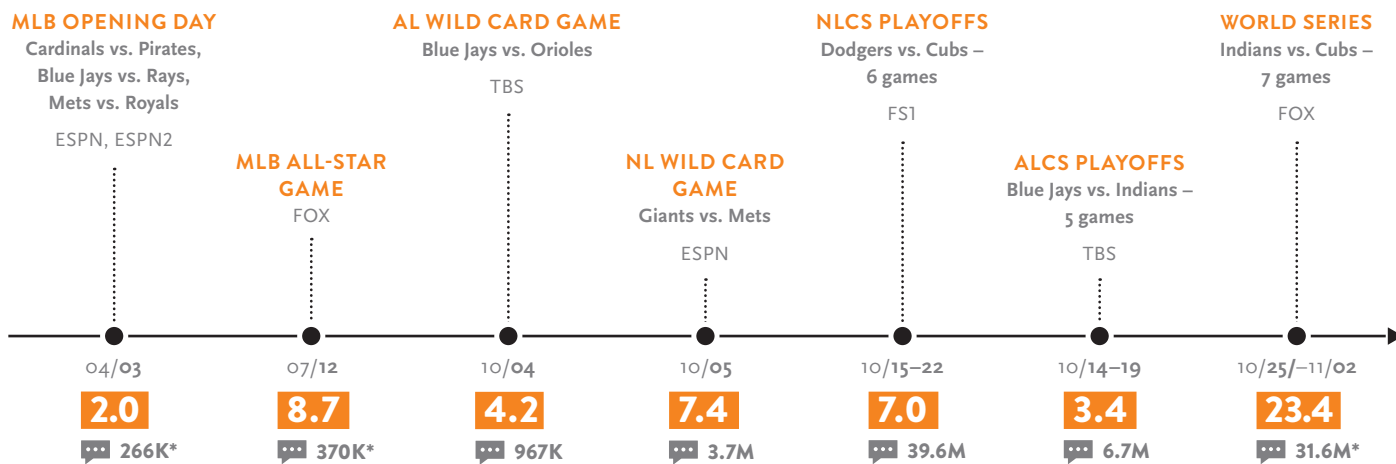


Fans celebrate the Chicago Cubs World Series victory over the Cleveland Indians outside of Wrigley Field.

TIMELINE OF TV VIEWERSHIP HIGHLIGHTS

AVERAGE # OF U.S. TV VIEWERS IN MILLIONS

SOCIAL TV INTERACTIONS *Twitter only



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

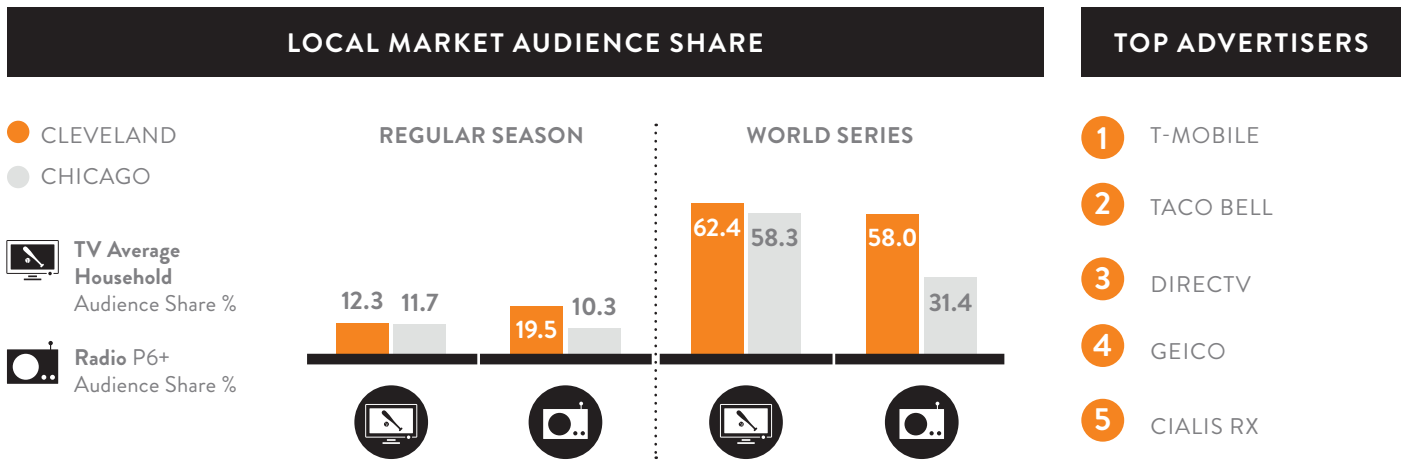
BREAKING THE CURSE

2016 was one of the most memorable World Series in recent history, and not many were willing to miss the action. Across the seven games, 113.7 million unique people were reached on TV, with the average viewer watching 300 minutes of the series. During the final game alone, people watched about 123 minutes on average, or just under half of the 4.5-hour broadcast. Those who were not able to watch the games could have caught the highlights on ESPN SportsCenter. During the World Series, the Cubs and Indians together made up 16.9% of all sports coverage on ESPN SportsCenter. Both teams had their highest monthly volume of coverage since Nielsen Sports started analyzing SportsCenter in 2012.

As the average U.S. adult spends almost a quarter of his or her weekly media time on social media (22%), it comes as little surprise that

these large ratings were coupled with large social TV interactions. Game 7 made up a shocking 77% of all Twitter TV interactions on November 2. Even MLB.com saw jumps in the 2016 postseason, as the unique audience in October saw a 24% increase from 2015 to 2016 and a 66% year-over-year increase for the month of November.

This engagement was strongest among local fans, as viewership in Chicago and Cleveland for Game 7 was incredible. Chicago roped in a 71% share, while Cleveland delivered a 69% share, meaning out of those with their TVs on in each market, 71% and 69% were tuning into Game 7. Indians fans also clearly enjoy engaging with America's favorite pastime via radio. The Indians' radio share was higher than the Cubs' during the regular season; a margin that substantially increased in the postseason.



DEEP PLAYOFF RUNS RESULT IN HOME RUNS FOR SPONSORS

CHICAGO CUBS

Overall signage exposure duration is up **6%**, and QI Media Value is up **73%** year-over-year (postseason included)

Including the postseason, **outfield wall duration is up 9%**, QI Media Value is up **131%** (OF wall was the most valuable location during the postseason)

73% of the Cubs' QI Media Value was generated during the **postseason**

CLEVELAND INDIANS

Overall signage exposure duration is up **15%**, and QI Media Value is up **223%** year-over-year (postseason included; Indians did not make playoffs in 2015)

Including the postseason, **outfield wall duration is up 20%**, QI Media Value is up **515%** (OF wall was the most valuable location during the postseason)

53% of the Indians' QI Media Value was generated during the **postseason**

QI Media Value is Nielsen Sports' global industry standard for sponsorship measurement. The quality index, or "QI," is calculated based on a proprietary method that considers size, duration, location and number of concurrent brand exposures. The QI Media Value takes into account the quality and weight of exposure, audience size and cost per thousand.



NHL

The 2015-2016 NHL season saw an uplift in viewership, especially on cable, with 8% more viewers tuning in for the average NHL game on NBCSN compared to the prior year. 2016's new All-Star format, with each division as its own team in a three-on-three single elimination tournament, was a hit with fans. Team selection was put up to a fan vote, resulting in little-known John Scott being chosen. The changes grabbed the interest of the public, as fan engagement for the All-Star Game was extremely high on Twitter and TV. At 8:21pm, during the announcement of John Scott's MVP, 8,599 Tweets were sent. The viewership for the game was the highest U.S. audience ever for an NHL All-Star game on cable, and up 34% from 2015's contest in Columbus.

The 2016 Stanley Cup Finals matchup between the Pittsburgh Penguins and San Jose Sharks had an average of nearly 4 million television viewers, but was down from 2015. The battle between the nation's two coasts ended in six games, with Sidney Crosby leading Pittsburgh to victory en route to hoisting his second Cup and first Conn Smythe Trophy.

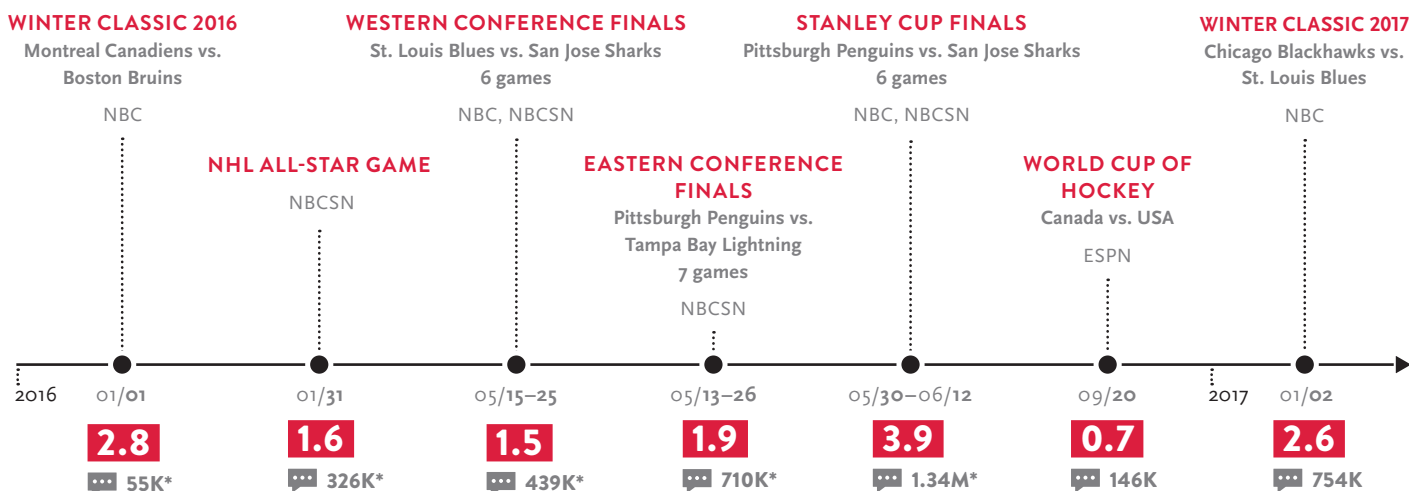


2016 NHL All-Star MVP John Scott during the Pacific vs. Central matchup.

TIMELINE OF TV VIEWERSHIP HIGHLIGHTS

AVERAGE # OF U.S. TV VIEWERS IN MILLIONS

SOCIAL TV INTERACTIONS *Twitter only



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

GLOBAL ICE ACTION HEATS UP

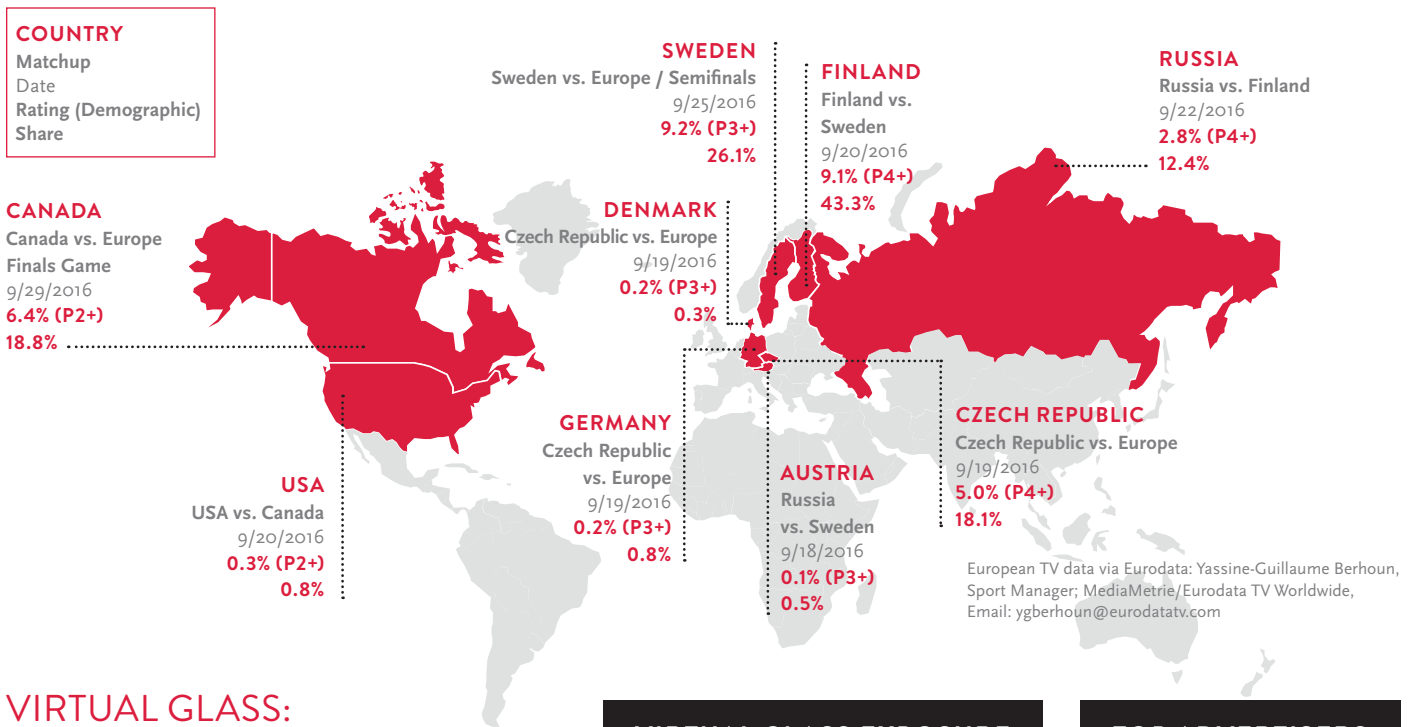
2016 was filled with many events that do not come around every year, but the fun was not just confined to the Olympics. Hockey had its own excitement, with the third annual World Cup of Hockey held just north of the border in Toronto.

Although the tournament competed with the NFL regular season and MLB playoffs, a record number of U.S. viewers tuned in to America's Group Stage matchup against Canada. The game saw a P2+ average audience of 766K: the highest U.S. audience ever for a World Cup of

Hockey game. This figure was up 41% compared to the USA's 2004 semifinal game against Finland (542K), and up 55% compared to the USA's 1996 championship win against Canada (492K).

The excitement was not limited to the U.S. Five of the participating countries had their most-viewed game capture at least 10% of the viewing market share, with the top share-getters being Finland (43%) during its matchup against Sweden, and Sweden (26%) for its bout against Team Europe.

MOST VIEWED GAMES – PARTICIPATING COUNTRIES



VIRTUAL GLASS: AN EXPOSURE ASSIST

Just a few years since a handful of NHL teams first experimented with virtual glass signage behind the goal, the sponsorship location became the third-most-valuable location during the 2015–16 season. Graphical images unseen to spectators inside the arena are superimposed on the glass by the broadcast cameras. The sponsorship location garnered more than \$31.1 million in QI Media Value during home game television broadcasts.

QI Media Value is Nielsen Sports' global industry standard for sponsorship measurement taking, into account the quality and weight of exposure, audience size and cost per thousand.

VIRTUAL GLASS EXPOSURE

Teams ranked by QI Media Value of Virtual Glass Sponsorship Location

- 1 NEW YORK RANGERS
- 2 CHICAGO BLACKHAWKS
- 3 PHILADELPHIA FLYERS
- 4 MONTREAL CANADIENS
- 5 LOS ANGELES KINGS

TOP ADVERTISERS

- 1 GEICO
- 2 DISCOVER
- 3 SUBWAY
- 4 COORS LIGHT
- 5 HONDA HR-V TRUCKS



SOCCER

2016 was a busy year on the pitch, as four tournament or league titles were decided by penalty kicks, and the Euros settled in extra time. The MLS Cup contest was a battle for North America, with a record average of 3.5 million viewers across U.S. and Canada watching the Seattle Sounders defeat Toronto FC. The U.S. alone accounted for just over 2 million, a 71% bump from the 2015 final.

Across the pond, Leicester City's improbable EPL championship was the story of the season. While the 37,000 average audience for the club's matches still trailed that of other clubs, Leicester City saw U.S. coverage duration of its matches increase 80% from 2015. Cristiano Ronaldo had a historic year, including Portugal's defeat of host France in the 2016 Euros final, with 3% more people viewing than for Spain's 2012 victory. Chile brought home its second Copa America title in as many years, once again besting Lionel Messi-led Argentina on penalties. Average audience viewership for the final was over 8.7 million, representing a 593% lift from 2015's beIN Sports-covered tournament.

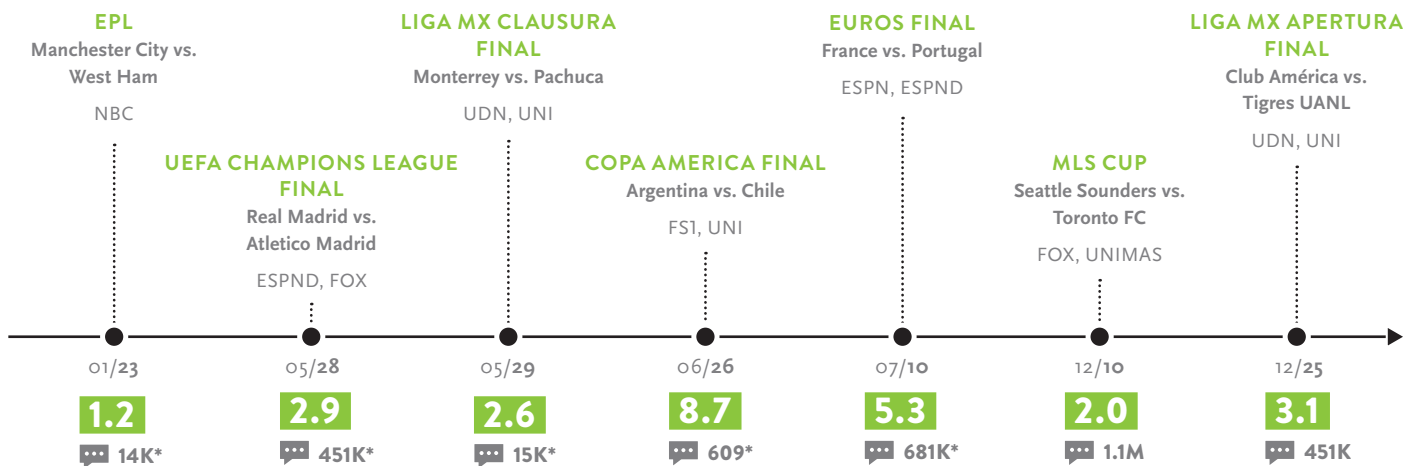


Ricardo Quaresma and Cristiano Ronaldo celebrate Portugal's win over France in the Euro 2016 Final.

TIMELINE OF TV VIEWERSHIP HIGHLIGHTS

AVERAGE # OF U.S. TV VIEWERS IN MILLIONS

SOCIAL TV INTERACTIONS *Twitter only



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

HISPANICS TUNE IN AT A DIFFERENT PITCH

In looking to create a deeper understanding of the heterogeneous Hispanic community, Nielsen and Culturati partnered to examine values, cultural blending and media consumption among Hispanics. An analysis of U.S. P2+ reach was conducted for four different segments: Latinistas, Heritage Keepers, Savvy Blenders and Ameri-Fans. These segments range from those who are very traditional and Hispanic-centered to those who are less focused on preserving Hispanic heritage. The reach within each segment for live broadcasts of soccer games was analyzed, and the Latinistas and Ameri-Fans segments were specifically compared.

The reach and avidity of soccer viewing appears to decrease for all four leagues as the level of Hispanic culture dominance decreases (i.e., are truly bicultural or culturally American). In addition, cultural

identity seems to factor into the telecast language preference of Hispanics, as the reach figures for Latinistas across all four leagues were composed of around 60% or more “Spanish-only” viewers.

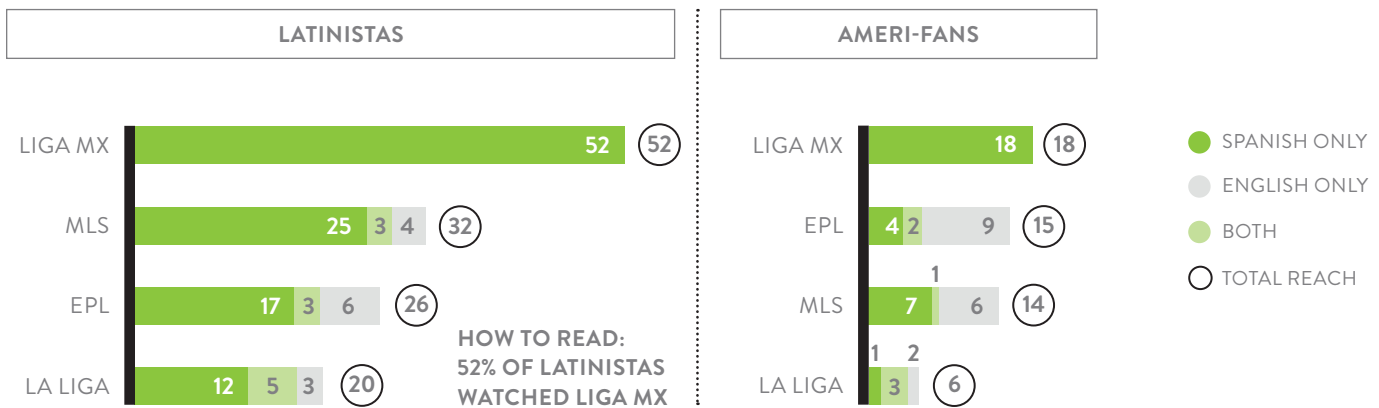
LATINISTAS

- Unacculturated, culturally Hispanic
- Very traditional and Hispanic-centered

AMERI-FANS

- Acculturated, culturally American
- Less focused on preserving Hispanic heritage
- More than 90% prefer to speak English

REACH BY SOCCER LEAGUE USING CULTURATI SEGMENTATION (U.S. P2+ AA REACH %)



MLS TO KICKOFF IN NEW CITIES

In December, the MLS announced its plan to expand to 24 teams by 2020, beginning with the addition of Atlanta United and Minnesota United FC next season.

ATLANTA

47.9% of adults in Atlanta who are **very interested** in the MLS are of **Spanish/Hispanic origin**

84.8% of adults in Atlanta who are very interested in the MLS are **also very interested in European soccer**

MINNEAPOLIS

17.0% of adults in Minneapolis who are **very interested** in MLS are of **Spanish/Hispanic origin**

79.1% of adults in Minneapolis who are very interested in MLS are **also very interested in European soccer**

TOP ADVERTISERS

MLS Only

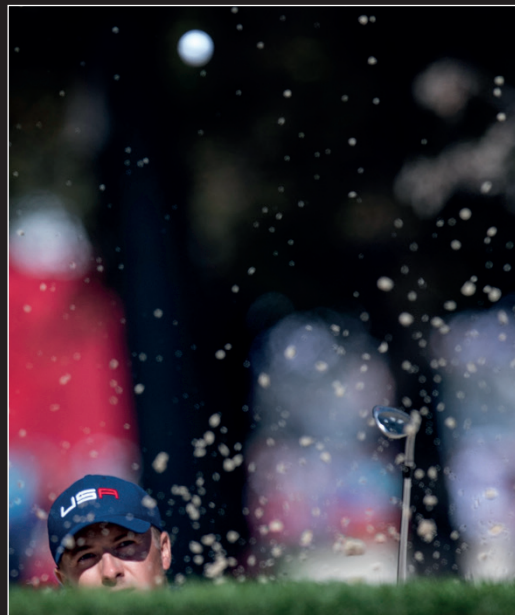
- 1 HEINEKEN
- 2 WELLS FARGO
- 3 AUDI
- 4 CONTINENTAL TIRES
- 5 AT&T



GOLF

While Jordan Spieth's 2015 major championship victories helped drive ratings growth, viewership for final-round coverage was down for three of the four majors. British Open's switch to NBC helped with the 46% bump in viewership year over year. The Ryder Cup, held every other year, returned to U.S. soil in 2016. An average of over 4.2 million viewers watched the Americans win, a victory dedicated to golf legend Arnold Palmer, who had passed earlier in the week. The tune-in for final-round coverage was up 94% compared to 2014's final round from Scotland. The U.S. Women's Open saw an impressive 35% increase over 2015's last day, as an average 1.3 million viewers tuned in for Brittany Lang's victory.

After a 112-year absence, golf made its return as an Olympic sport during Rio 2016. Live coverage of the four days of play had an average audience of 579,000 viewers, which is a great figure considering that top players, including Jordan Spieth and Rory McIlroy, declined to participate. The final round, which saw the lone American medalist, Matt Kuchar, earn bronze, had an average audience viewership of 1.5 million on the Golf Channel.



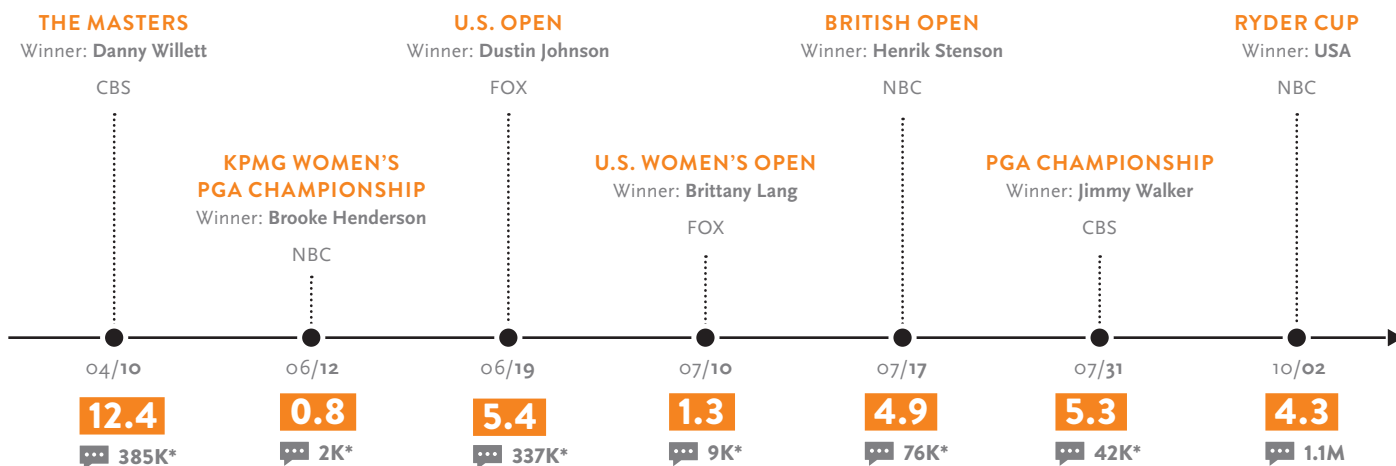
> Team USA's Jordan Spieth hits out of a bunker during the Ryder Cup at Hazeltine National Golf Course.

TIMELINE OF TV VIEWERSHIP HIGHLIGHTS

AVERAGE # OF U.S. TV VIEWERS IN MILLIONS

SOCIAL TV INTERACTIONS

*Twitter only



Only the final day of each tournament is listed

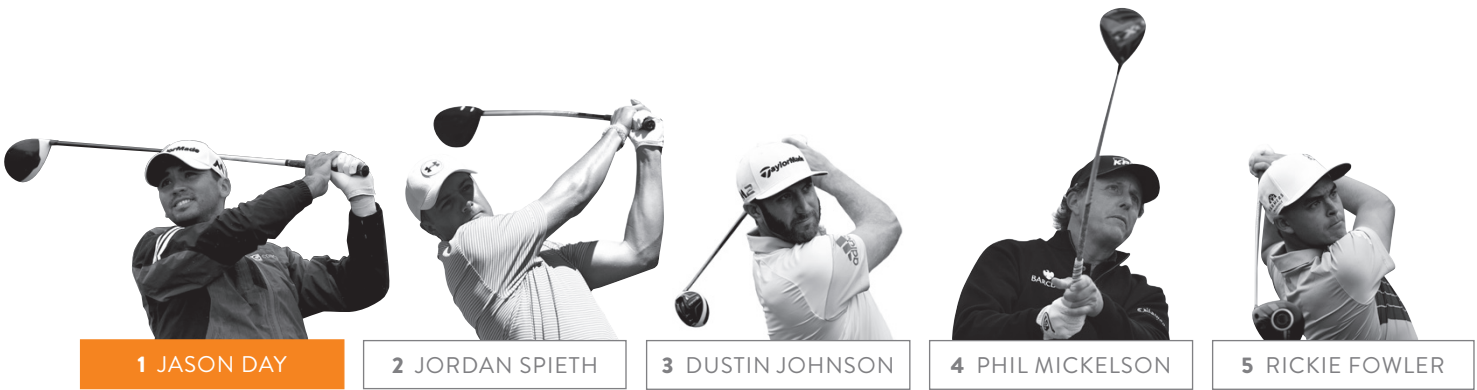
GOLF HITS AN ACE WITH RISING STARS

Jason Day, the World Golf Rankings no. 1 golfer, provided the highest sponsorship exposure value to his brands, when looking at both the U.S. and abroad. Day earned three PGA Tour wins in 2016, which contributed to his high coverage time and exposure.

Jordan Spieth's success in 2015 seemed to carry over into 2016, at least when it came to sponsorship branding. Despite not winning a major, his star power and success on the course led to a second-

place rank in sponsorship exposure based on 100% U.S. media equivalency. Golf's third member of the "New Big Three," Rory McIlroy, managed to finish the year at no. 3 in the World Golf Rankings, but failed to make the cut in two of the four majors, leading to a sponsorship exposure rank of 5th. Tiger Woods' long-awaited return to golf came at December's Hero World Challenge event, and despite finishing 15th overall in his only event of the year, Woods led all golfers in time on screen for that one event.

TOP GOLFER SPONSORSHIP BRANDING



TOP SPONSORSHIP LOCATIONS (TEAM ASSETS ONLY)

TOP SPONSOR BRANDS



- 1 TAYLORMADE GOLF
- 2 ADIDAS
- 3 UNDER ARMOUR
- 4 NIKE
- 5 CALLAWAY GOLF

*value out of total team/player sponsorship assets
100% Media Equivalency: Gross Advertising Equivalent



UFC

The Ultimate Fighting Championship made big strides in 2016 with the legalization of mixed martial arts in New York state and its acquisition by global sports and entertainment powerhouse WME-IMG. The appeal of UFC and MMA has seen growth not only in the U.S., but also across international markets. According to Nielsen SportsDNA, which is surveyed across 33 countries, interest in UFC rose 6.3% in Russia, 5.0% in Spain and 4.5% in Poland since 2014. Still, the top five countries for the sport in 2016 include Thailand, Malaysia, Turkey, Singapore and Brazil.

In 2016, “the Notorious” Conor McGregor was the biggest draw for pay-per-view sales in the U.S., and became the first man to simultaneously hold title belts in two weight classes. Although many were excited for Ronda Rousey’s return to the octagon, she was defeated in a remarkable 48 seconds by incumbent bantamweight champion Amanda Nunes. According to Nielsen Social, there were 6.6 million social TV interactions around this UFC 207 fight, and over 17,000 interactions during the peak minute immediately following Nunes’ victory.



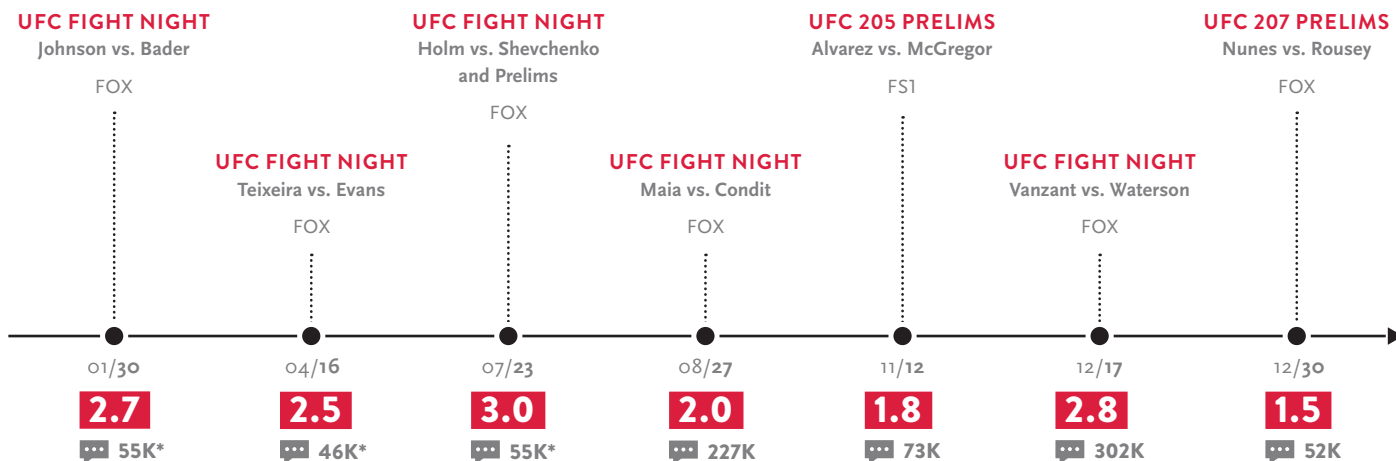
Conor McGregor celebrates after winning UFC 205 over Eddie Alvarez.

TIMELINE OF TV VIEWERSHIP HIGHLIGHTS

AVERAGE # OF U.S. TV VIEWERS IN MILLIONS

SOCIAL TV INTERACTIONS

*Twitter only



THE McGREGOR EFFECT

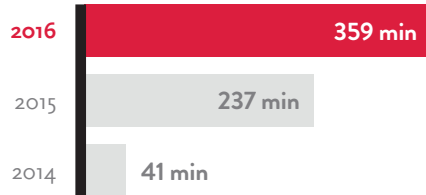
Since his record-setting 13-second knockout of Jose Aldo in December 2015, charismatic and one-of-a-kind star Conor McGregor has been thrust into the spotlight. The buzz around the Irish fighter continued, and in 2016 his three fights drew the attention of sports fans to the UFC. When looking at U.S. viewership and TV coverage for the UFC, McGregor's magnetism appeared to increase viewership for his lead-in prelim fights on FOX Sports 1, coverage across sports news and interest from younger fans.

McGregor's three pay-per-view prelim fights on FS1 had an average audience of 1.6 million, which was 80% larger than the

average across the eight other FS1 PPV prelims. Two of these telecasts were in the top four most-viewed since UFC moved to FOX Sports in 2013. For his prelims, the median age of the viewer was 39.4 versus 43.6 for the other eight PPV prelims, which was driven by the high P18-34 audience.

As a result of both McGregor's prowess in the octagon and his personality outside of it, ESPN SportsCenter increased the amount of coverage devoted to UFC. In 2016, two of the top three highest months of UFC coverage on ESPN SportsCenter were March and August, when McGregor had his UFC 196 and UFC 202 fights.

UFC # OF MINUTES OF ESPN SPORTSCENTER COVERAGE



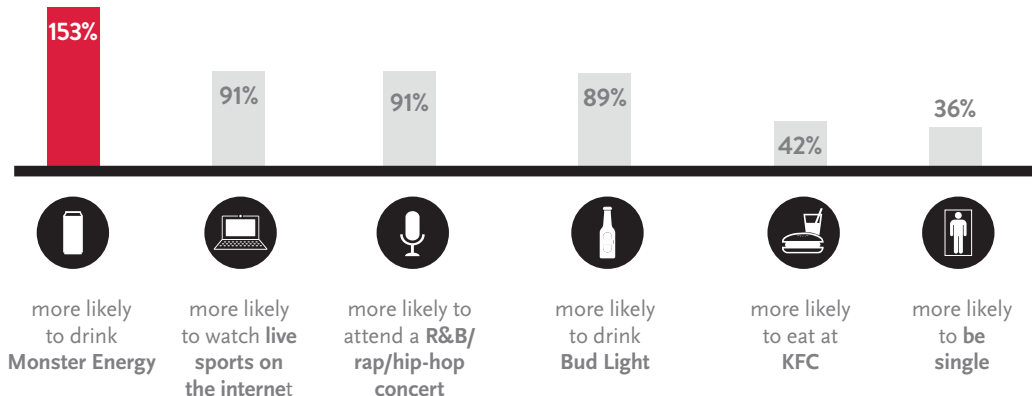
TOP ADVERTISERS

- 1 METRO PCS
- 2 BUD LIGHT
- 3 GEICO
- 4 APPLEBEE'S
- 5 KFC

UFC FAN INSIGHTS: UFC FANS COMPARED TO THE AVERAGE U.S. ADULT

FANS ARE DEFINED AS THOSE SOMEWHAT OR VERY INTERESTED IN UFC

Monster Energy's partnership with UFC seems to be paying off, as fans of the sport are much more likely than the average U.S. adult to consume the energy drink. In addition, UFC fans are more likely to drink Bud Light and eat at KFC, which are two of UFC's top advertisers.



TOP COUNTRIES

MOST INTERESTED IN MMA IN 2016

- 1 THAILAND
- 2 MALAYSIA
- 3 TURKEY
- 4 SINGAPORE
- 5 BRAZIL



NCAA BASKETBALL

Interest in NCAA Men's Division I Basketball clearly grows throughout the season. The average audience for regular-season games in March was 79% higher than at the start of the season in November. This buildup to March Madness did not disappoint. The championship game came down to a three-point buzzer beater and a resurgence of the "Crying Jordan" meme. Almost 16 million people watched one of the most dramatic finishes in the history of college basketball as Villanova defeated North Carolina on April 4.

Despite this nail-biting finish, the ratings across TBS, TNT and TruTV were down from 2015. However, the final minutes of the championship game on TBS saw ratings as high as 19 million viewers. Regardless of ratings, March Madness and NCAA Basketball attracts a sought-after audience. Seventy-six percent of the tournament audience has had at least some college education, and 52% have an income of \$75,000 or more, which is a higher audience composition than many professional sports.



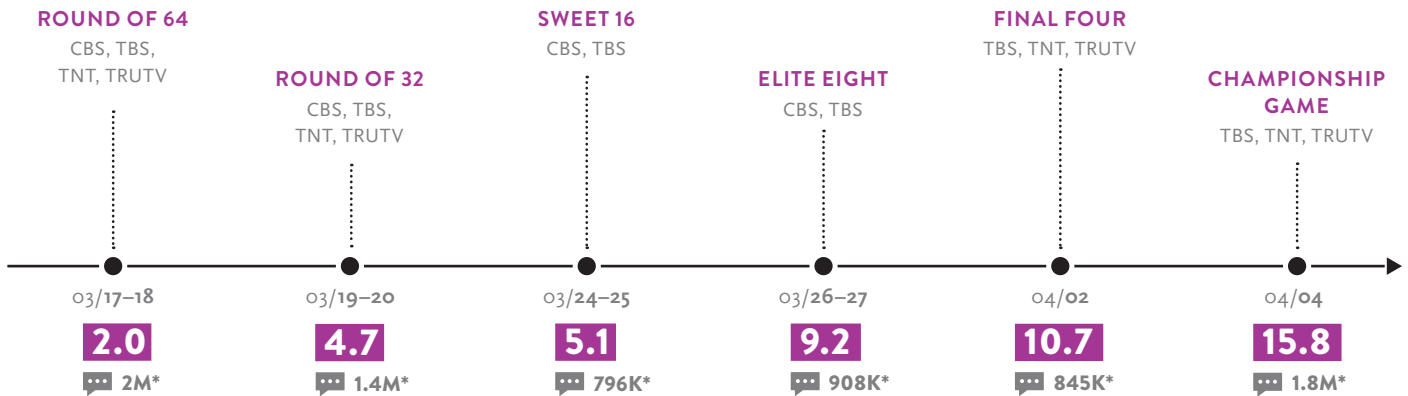
Villanova's Kris Jenkins makes a buzzer beater to defeat North Carolina in the NCAA Championship Game.

TIMELINE OF TV VIEWERSHIP HIGHLIGHTS

AVERAGE # OF U.S. TV VIEWERS IN MILLIONS

SOCIAL TV INTERACTIONS

*Twitter only



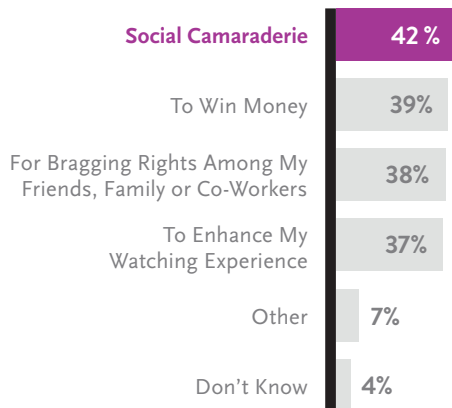
Tweets were added up across all events in the Elite Eight and Final Four.

THE METHOD BEHIND THE MADNESS

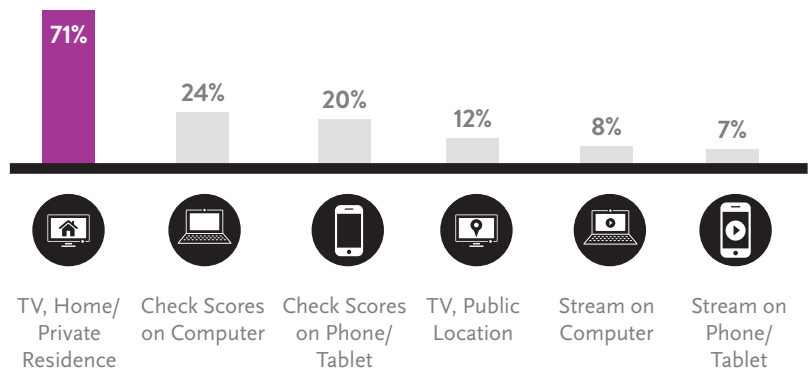
First-round upsets busted many 2016 March Madness brackets, but, fortunately, social camaraderie and bragging rights among family and friends are just as important to bracket participants as winning money. This is a comforting notion, since 13% of participants select their winners based on team colors. These drivers are further illustrated by the types of pools that bracket participants are most likely to join. A pool with family or friends is nearly twice as likely to be joined when compared to others composed of coworkers, a public forum or independent/non-group participants.

To get full social capital from these pools, participants have to be in the know and watch the games live. The TV screen is unrivaled as the primary means of engaging with March Madness. Among bracket participants, 71% watch or track the tournament on television, with checking scores online via a computer or tablet coming in a distant second and third. Twenty-six percent of participants prefer to do their trash-talking in person, while 17% of fans take to social networks. This past year, there were 1.8 million Tweets surrounding the championship game broadcast, which made up 50% of all Twitter TV interactions on April 4.

REASONS FOR PARTICIPATING



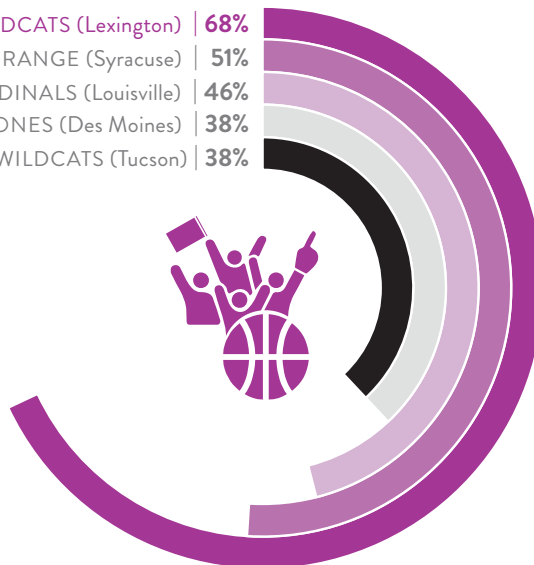
TOP WAYS TO FOLLOW



TOP 5 LOCAL NCAA BASKETBALL FAN BASES

1. KENTUCKY WILDCATS (Lexington) | 68%
2. SYRACUSE ORANGE (Syracuse) | 51%
3. LOUISVILLE CARDINALS (Louisville) | 46%
4. IOWA STATE CYCLONES (Des Moines) | 38%
5. ARIZONA WILDCATS (Tucson) | 38%

% OF POPULATION THAT HAS WATCHED, ATTENDED OR LISTENED TO THE TEAM IN THE PAST 12 MONTHS (SCARBOROUGH)



TOP ADVERTISERS

- 1 AT&T
- 2 CAPITAL ONE
- 3 NORTHWESTERN MUTUAL FINANCIAL
- 4 LOWE'S HOME IMPROVEMENT
- 5 COCA-COLA CLASSIC



NCAA FOOTBALL

NCAA Football entered its third year of the College Football Playoff (CFP), which now has a proven track record of exciting games, high viewership numbers and large payoffs for sponsoring brands. The 2016 CFP did not disappoint, as Clemson dethroned Alabama in a thrilling rematch of the 2015 championship. With 25 million viewers, the game was the most-watched program on cable television in 2016. In addition, it generated an enormous amount of conversation on social media, with over 1.9 million interactions occurring during the game's final moments.

The Cinderella story of the season was the Washington Huskies' appearance in the CFP, after having ranked in the top 25 for the first time since 2002. Their playoff game against Alabama drew a 22.1 household rating in the Seattle market, making it the fifth-highest-rated telecast of the year in the Seattle market outside of NFL programming. Overall, the 2016 season's excitement and storylines drew over 159 million people throughout the regular season, an increase of 4 million people from the 2015 regular season.



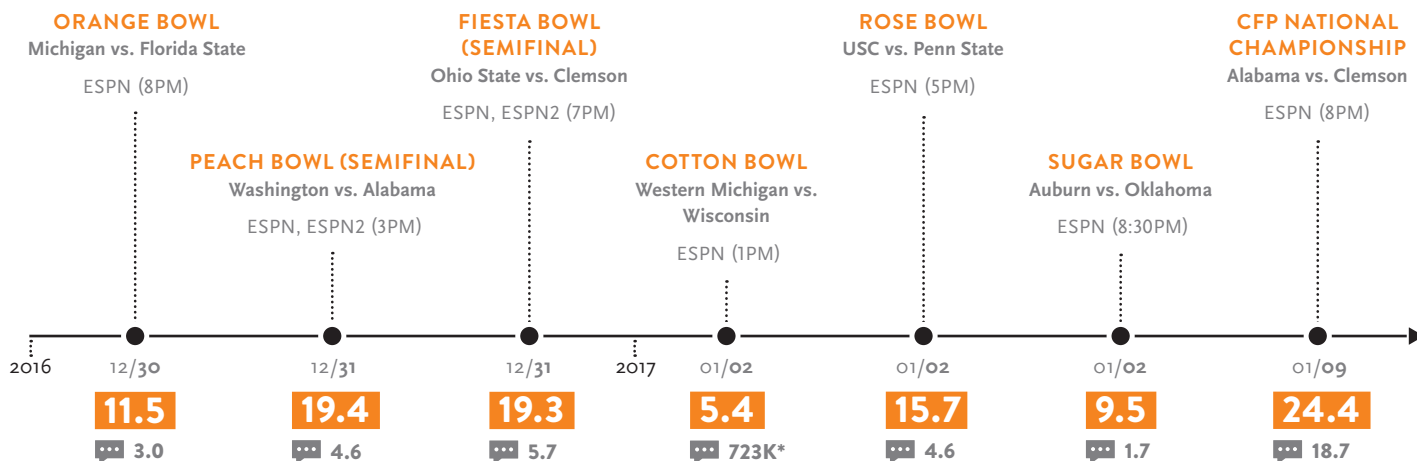
Clemson quarterback Deshaun Watson runs for a touchdown in the 2017 CFP National Championship.

TIMELINE OF TV VIEWERSHIP HIGHLIGHTS

AVERAGE # OF U.S. TV VIEWERS IN MILLIONS

SOCIAL TV INTERACTIONS IN MILLIONS

*Twitter only

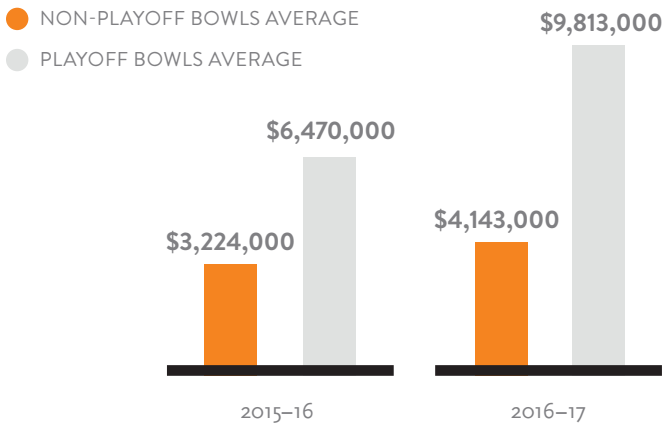


PLAYOFF BOWLS WIN BIG

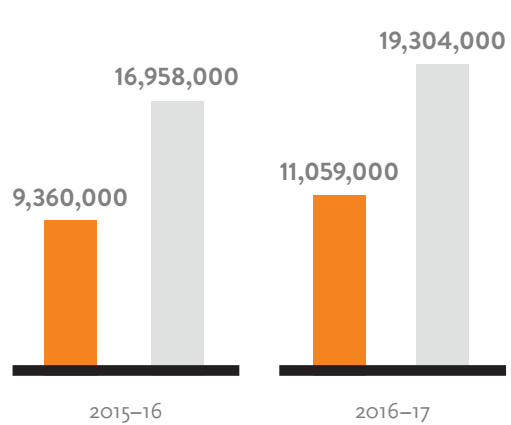
With the completion of the third season of the College Football Playoff, each of the top six bowl games – Cotton Bowl, Fiesta Bowl, Orange Bowl, Peach Bowl, Rose Bowl and Sugar Bowl – have all had their chance to be one of the two playoff bowls. Although it is fairly new, the CFP has proven its worth. In 2015, playoff bowls drew an average audience that was 81% larger than the non-playoff bowls. In 2016, the average audience was 75% larger. The playoff bowls garner increased interest in college football postseason play, with

23.6% and 24.0% – in 2015 and 2016, respectively – of viewers tuning into ONLY playoff bowls, and none of the other four non-playoff games. The piqued interest and resulting viewership increases have translated into greater media value for entitlement sponsors. In 2015, playoff bowl entitlement sponsors garnered twice the Q1 media value on average than entitlement sponsors of non-playoff bowls. In 2016, playoff entitlement sponsors received 2.4 times the Q1 media value than non-playoff sponsors.

BOWL SPONSOR'S Q1 MEDIA VALUE



P2+ AVERAGE AUDIENCE



'THE GAME' AND THE ELECTION

The Michigan Wolverines and Ohio State Buckeyes' rivalry, known as "The Game" to many fans, was the most-watched college football game of the regular season (16 million viewers). Both teams' fan bases also played a pivotal role in the election, as Michigan and Ohio were swing states.

OHIO STATE FANS

61% of adults in the Columbus, OH, market are Ohio State fans

Ohio State fans who have party affiliations are **13%** more likely to identify as Republican

MICHIGAN FANS

42% of adults in the Detroit, MI, market are Michigan Wolverine fans

Michigan fans who have party affiliations are **33%** more likely to identify as Republican

TOP ADVERTISERS

- 1 AT&T
- 2 CHICK-FIL-A
- 3 TACO BELL
- 4 CAPITAL ONE
- 5 DR. PEPPER



NASCAR

NASCAR fans witnessed heartbreak for one of its biggest stars, followed by a comeback story in the 2016 Chase. Dale Earnhardt, Jr., who according to Nielsen Talent Analytics has the highest Awareness score out of all auto racers measured (67), was sidelined by a concussion halfway through the season. Prior to this, he had finished no worse than third in six of the 2016 races.

However, Jimmie Johnson, a non-contender earlier in the year, lifted spirits by battling back to capture his seventh NASCAR Sprint Cup Series Championship. Johnson won five races in 2016, with three of those wins occurring during the playoffs. Johnson, who has a Nielsen N-Score of 45 for Awareness, higher than the average score for auto racing (27), joins Richard Petty and Dale Earnhardt as the only drivers with seven NASCAR titles.

The 2016 NASCAR Sprint Cup Series Championship at Homestead-Miami Speedway on NBC and NBCSN delivered 6.1 million viewers across the two networks and was the most-watched Chase race of the year for the network.



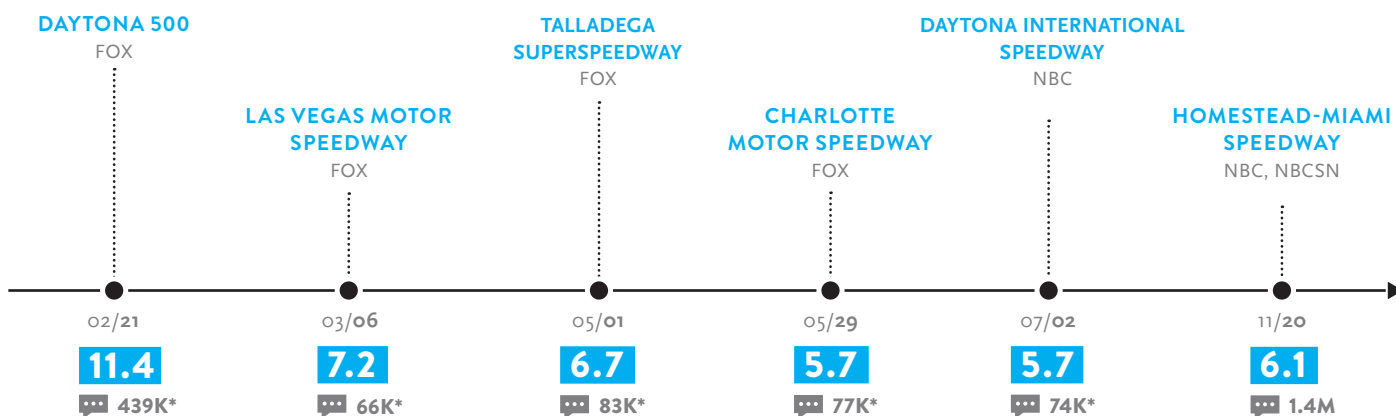
▶ Jimmie Johnson celebrates after winning the Ford EcoBoost 400 in Homestead, FL.

TIMELINE OF TV VIEWERSHIP HIGHLIGHTS

AVERAGE # OF U.S. TV VIEWERS IN MILLIONS

SOCIAL TV INTERACTIONS

*Twitter only



SPRINT SPONSORSHIP CROSSES THE FINISH LINE

After 13 years, Sprint's run as the entitlement partner of NASCAR's premier series came to an end in 2016. The sponsorship started in 2004 with Nextel and changed to the NASCAR Sprint Cup Series in 2008 after the Nextel/Sprint merger. Sprint garnered more than \$115 million in QI Media Value during race broadcasts throughout the 2016 season, more than twice as much exposure as the next brand. NASCAR announced that Monster Energy signed a multiyear deal to take over the entitlement sponsorship of the series beginning in 2017.

With NASCAR fans responding favorably to sponsorships, it is likely that the new entitlement sponsor, Monster Energy, will have great opportunities ahead. According to Nielsen Sports' Sponsorlink, 84% of NASCAR fans feel loyal toward companies that sponsor an event or sport, and 91% are likely to consider a sponsor's brand, product or service. Both of these attitudes toward sponsors over index against the general population.

NASCAR FANS RESPOND TO SPONSORSHIP



NASCAR FANS

91%	are likely to consider a company's brand, product or service based on sponsorship 61%
84%	feel loyal toward companies that sponsor an event or sport 74%
30%	talked about a brand to friends and family after seeing a sponsorship 16%
27%	bought the brand after seeing the sponsorship 20%

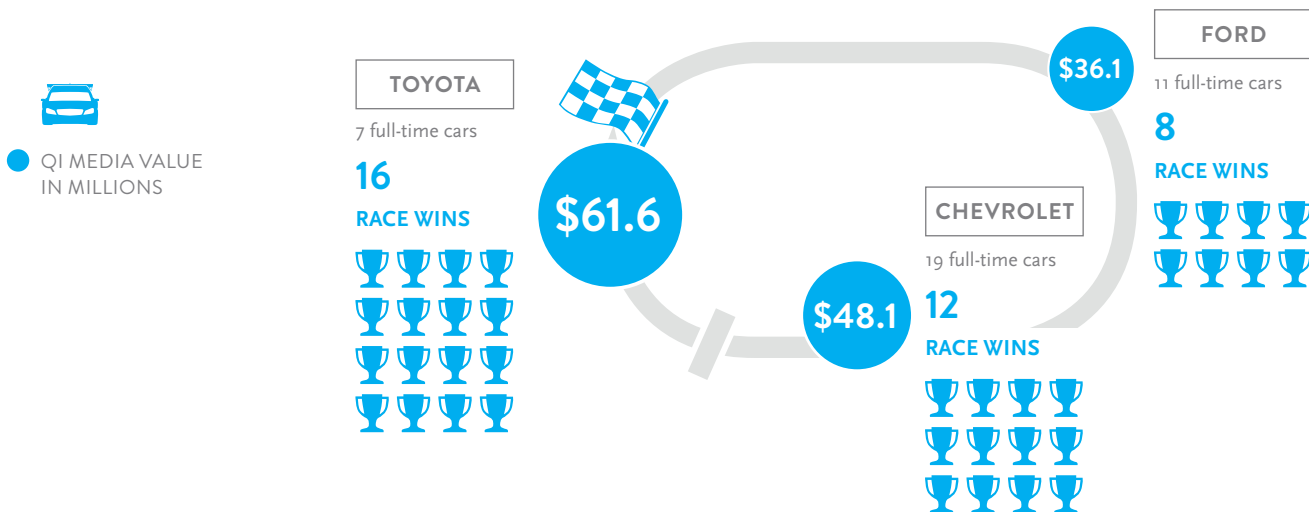


GENERAL POPULATION

PERFORMANCE PAYS FOR CAR MANUFACTURERS

Even though a Chevrolet piloted by Johnson won the 2016 NASCAR Sprint Cup Series Championship, Toyota won the Manufacturer's Championship with 16 victories in the 2016 season and led all stock car manufacturers for in-race exposure, garnering more than \$61.6 million worth of QI Media Value. Only seven, or 19%, of the

full-time cars in the weekly race field were Toyotas, yet Toyotas won nearly half of the races. Toyota received about 5.75 more hours of time on screen in 2016, resulting in an increase of \$13 million in QI Media Value year over year for the brand.



QI Media Value is Nielsen Sports' global industry standard for sponsorship measurement. The quality index, or "QI", is calculated based on a proprietary method that considers size, duration, location and number of concurrent brand exposures. The QI Media Value takes into account the quality and weight of exposure, audience size and cost per thousand.



INDYCAR

The 2016 Verizon IndyCar Series season ratings grew 7% year over year for races televised on ABC and generated a total of \$88.5M in domestic QI Media Value across 741 brands, as well as an additional \$12M across in Canada, Mexico, Brazil and Japan. Using Nielsen's Sport24 syndicated sponsorship media valuation database, we can see that Verizon, the title sponsor for IndyCar's premier series, comes in at fourth among all brands, behind the official tire and two race car manufac-

turers. The most watched race on television and in person was the Indianapolis 500. The 100th running of the race attracted a sold-out crowd for the first time in the event's history, prompting the Verizon IndyCar Series to lift the live television broadcast black-out in the local television market for only the third time since the early 1950s. More than 6 million viewers watched the race broadcast in the U.S. on ABC. The race was also syndicated in 147 countries around the world.

TOP SPONSORS BY QI MEDIA VALUE (OFFICIAL & TEAM PRIMARY ONLY)

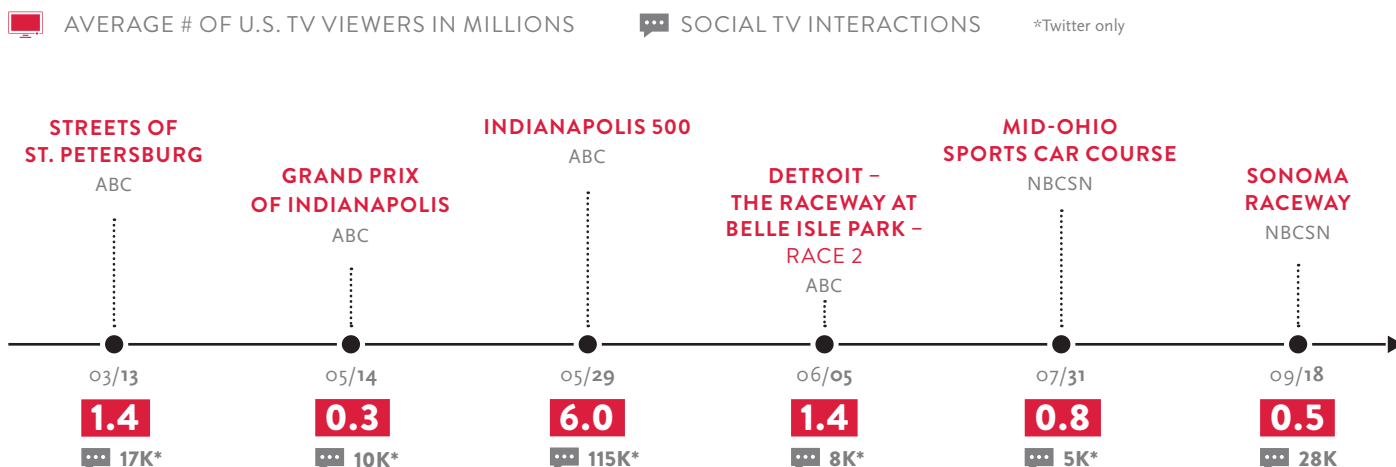
- 1 FIRESTONE
- 2 CHEVROLET
- 3 HONDA
- 4 VERIZON
- 5 NTT DATA



Simon Pagenaud of France at the GoPro Grand Prix of Sonoma.

QI Media Value is Nielsen Sports' global industry standard for sponsorship measurement. The quality index, or "QI", is calculated based on a proprietary method that considers size, duration, location and number of concurrent brand exposures. The QI Media Value takes into account the quality and weight of exposure, audience size and cost per thousand.

TIMELINE OF TV VIEWERSHIP HIGHLIGHTS





BOXING

The Olympics has always been an event where amateur fighters make a name for themselves, and Rio 2016 was no different. For Team USA, 21-year-old middleweight Claressa Shields became the first American to win back-to-back gold medals in boxing. While on the men's side, 19-year-old bantamweight Shakur Stevenson won a silver medal and is now poised for a successful professional career.

American fighters also drew some of the best ratings for the sport on cable and broadcast TV, as Danny Garcia,

Keith Thurman and Andre Berto look to fill the void left by Floyd Mayweather's retirement. Premier Boxing Champions drew its largest average audience (4.8 million viewers) for Errol Spence's victory over Leonard Bundu. This was largely due to the bout starting after the U.S. Olympic men's basketball team won the gold medal on NBC. Premier Boxing Champions' ability to retain some of the audience from the gold medal basketball game is not surprising, as NBA fans are 136% more likely than the average U.S. adult to be boxing fans.

TOP ADVERTISERS

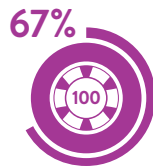
- 1 CORONA EXTRA BEER
- 2 MOTEL 6 HOTELS
- 3 MOBILE STRIKE WEB-BASED APP
- 4 APPLEBEE'S
- 5 KFC

BOXING FANS GO "ALL IN" AT CASINOS

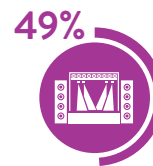
BOXING FANS COMPARED TO THE AVERAGE U.S. ADULT AT CASINOS



more likely to have gone to a bar/nightclub



more likely to have played table games

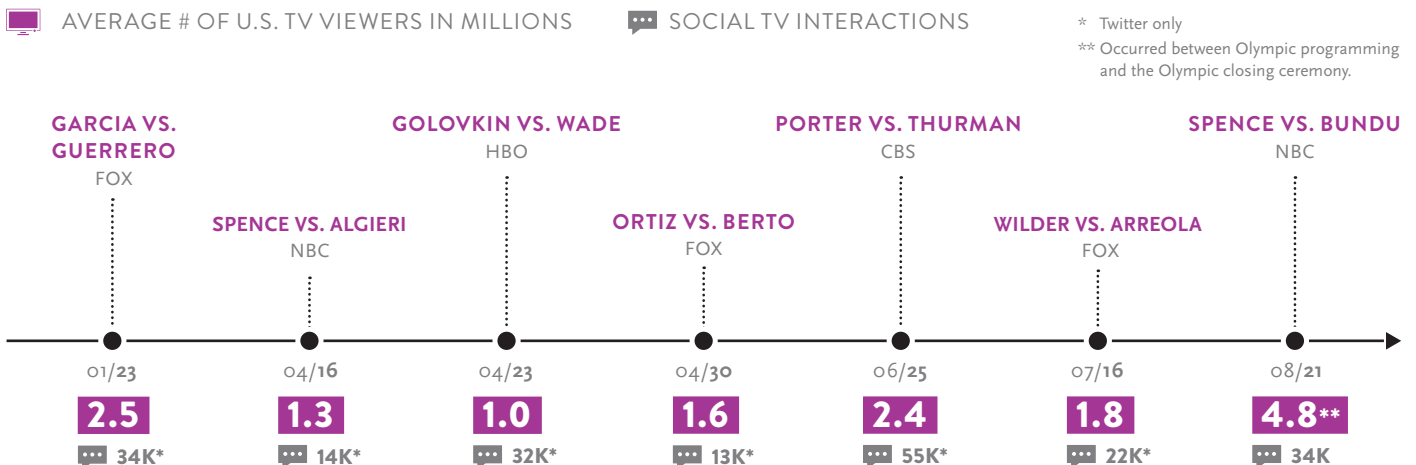


more likely to have watched a stage show or concert



more likely to have gone to an upscale restaurant

TIMELINE OF TV VIEWERSHIP HIGHLIGHTS



SOURCES

UPFRONT

○ 1. ESPORTS HAVE EVOLVED FROM NICHE TO MAINSTREAM

- Nielsen 2016 eSports Report
- Nielsen Sports 360 Report
- TV Viewers: National TV Toolbox

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- Nielsen Sports Social Valuations 2015-2016 seasons; Teams include NBA, MLB and NHL
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- Daily Fantasy Ad Spend: Nielsen Ad Intel, Time Period: 9/1/15-11/30/15 & 9/1/16-11/30/16; Media Types: Spot TV, Network TV, Cable TV
- Daily Fantasy Consumption: Nielsen Electronic Mobile Measurement, U.S., P18+, Sep 2015-2016

○ TIMELINE

- TV Viewers: National TV Toolbox, Ratings Analysis, September 2016 – February 2017, P2+ and Live+SD
- Social: Nielsen Social, September 2016 – February 2017

○ NFL DOMINATES FIRST AND SECOND SCREENS

- 2016 Nielsen Social Media Report
- Nielsen Social Content Ratings, 1/5/17
- National TV Toolbox, Ratings Analysis, 1/5/17, P2+ and Live+SD

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NBA

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○ TIMELINE

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- Exposure rankings
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 - National TV Rank – Nielsen National TV View, Ratings Analysis, Regular Season: October 2015 – April 2016, Live NBA Games on ABC, ESPN, TNT, Household, Live+SD
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 - South (MD, WV, VA, KY, NC, TN, AR, MS, AL, GA, SC, FL, LA, DE, TX, OK, Washington DC)
 - West (AK, HI, WA, OR, CA, AZ, NV, UT, ID, MT, WY, CO, NM)

○ TOP ADVERTISERS

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MLB

○ INTRODUCTION

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○ TIMELINE

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- MLB.com: Nielsen Digital Content Ratings, Monthly Totals, P13+: 10/1/15 – 10/31/15, 11/1/15 – 11/30/15, 10/1/16 – 10/31/16, 11/1/16 – 11/30/16
- TV Share: Nielsen Local TV View, Ratings Analysis, DMAs: Cleveland and Chicago, National and Local Airings

- Radio: Nielsen Audio PPM Sample; P6+ Share; Cleveland Indians Games on WTAM-AM and WMMS-FM; Chicago Cubs Games on WSCR-AM

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○ TIMELINE

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- USA Viewership Facts: Nielsen National TV Toolbox, Ratings Analysis, September 20, 2016; September 14, 2004; September 14, 1996, P2+, Live+SD
- International Ratings: Eurodata, TV Worldwide/Relevant Partners, Period: September 2016
 - Yassine-Guillaume Berhoun, Sport Manager; MediaMetrie/Eurodata TV Worldwide, Email: ygberhoun@eurodatatv.com

○ VIRTUAL GLASS: AN EXPOSURE ASSIST

- Sport24, Top Locations by Quality Index Media Value (QI MV) Regular Season and Postseason, Top Teams by Virtual Glass Location

○ TOP ADVERTISERS

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SOCCER

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- Canada Viewers: Numeris, December 10, 2016, TSN & RDS, P2+ AA Projection, Live+SD

○ TIMELINE

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○ HISPANICS TUNE IN AT A DIFFERENT PITCH

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- Heritage Keepers: Bicultural, focused on preserving Hispanic heritage and building a comfortable cultural environment, more than 80% prefer to speak Spanish
- Savvy Blenders: Bicultural, culturally diverse, focused on preserving Hispanic heritage and also blending cultures
- Ameri-Fans: Acculturated, culturally American, less focused on preserving Hispanic heritage, more than 90% prefer to speak English
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- Liga MX: Full Season Clausura 2016 & Apertura 2016 until 11/27/16 (1/8/16-11/27/16); Azteca, Telemundo, Univision, NBC Universo
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○ MLS TO KICK OFF IN NEW CITIES

- Scarborough USA Release 2, 2016; DMA: Atlanta and Minneapolis

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GOLF

○ INTRODUCTION

- National TV Toolbox, Ratings Analysis, January – December 2016, January – December 2015, January – December 2014, P2+, Live+SD

○ TIMELINE

- TV Viewers: National TV Toolbox, Ratings Analysis, April 2016 – October 2016, P2+, Live+SD
- Social: Nielsen Social, April 2016 – October 2016

○ GOLF HITS AN ACE WITH RISING STARS

- Top Golfer Sponsorship Branding: Cumulative Player Sponsorship Branding – Sport 24 PGA Tour 2015-16 Full Season: 100% Media Equivalency, U.S. Market
- Top Sponsor Team Assets: Sport 24 PGA Tour 2015-16 Full Season: 100% Media Equivalency, U.S. Market

○ TOP SPONSORS

- Top Sponsor Brands: Sport 24 PGA Tour 2015-16 Full Season: 100% Media Equivalency, U.S. Market

○ TOP ADVERTISERS

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UFC

○ INTRODUCTION

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○ TIMELINE

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- Top 5 Countries Most Interested in MMA: 2016 Nielsen SportsDNA, Ages 16-69, 33 Countries; Conducted in Two Waves per Year, May and November

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NCAA BASKETBALL○ **INTRODUCTION**

- National TV Toolbox, Ratings Analysis, November 2015-April 2016, P2+, Live+SD
- National TV Toolbox, Reach Analysis, March 2016 – April 2016, P2+, Live+SD, 6-Minute Qualifier, Income and Education Marketbreak

○ **TIMELINE**

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- Nielsen Scarborough Local Markets Release 2, 2016

○ **TOP ADVERTISERS**

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NCAA FOOTBALL○ **INTRODUCTION**

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○ **TIMELINE**

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- National TV Toolbox, Only-Only-Both Reach Analysis, Bowl Games: December – January 2016 and December – January 2015, P2+, Live+SD, 6-Minute Qualifier

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○ **TOP ADVERTISERS**

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NASCAR

○ INTRODUCTION

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- Nielsen Talent Analytics:
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○ TIMELINE

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- Social: Nielsen Social, February 2016 – November 2016

○ SPRINT SPONSORSHIP CROSSES THE FINISH LINE

- NASCAR Fans vs. General Population Respond to Sponsorship: Sponsorlink

○ PERFORMANCE PAYS FOR CAR MANUFACTURERS

- Top Sponsor Brands by In-Race Exposure: Sport24, QI Media Value, NASCAR February 2016 – November 2016
- Top Primary Car Sponsors by In-Race Exposure: Sport24, QI Media Value, NASCAR February 2016 – November 2016

INDYCAR

○ INTRODUCTION

- National TV Toolbox, Ratings Analysis, January – December 2016, January – December 2016, P2+, Live+SD
- Sport24, QI Media Value, U.S. Market, IndyCar March – September 2016

○ TOP SPONSORS BY MEDIA VALUE

- Top Sponsor Brands by In-Race Exposure: Sport24, QI Media Value, IndyCar March – September 2016

○ TIMELINE

- TV Viewers: National TV Toolbox, March – September 2016, P2+ and Live+SD
- Social: Nielsen Social, March – September 2016

BOXING

○ INTRODUCTION

- Scarborough USA Release 1 *Reissue 9/1/2016; DMA: Scarborough USA +

○ BOXING FANS GO “ALL IN” AT CASINOS

- Scarborough USA Release 1 *Reissue 9/1/2016; DMA: Scarborough USA +

○ TOP ADVERTISERS

- Ad Intel Q4 2015 – Q3 2016, National TV

○ TIMELINE

- TV Viewers: National TV Toolbox, January 2016 – August 2016, P2+ and Live+SD
- Social: Nielsen Social, January 2016 – August 2016, P2+ and Live+SD



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