



YEAR IN SPORTS MEDIA REPORT

2013

nielsen
.....

AN UNCOMMON SENSE
OF THE CONSUMER™



STEPHEN MASTER SVP
SPORTS, NIELSEN

WELCOME

Welcome to Nielsen's State of the Media: 2013 Year in Sports Media Report, a compilation of media highlights, advertiser trends and consumer insights across leading sports properties. This year, with the addition of Nielsen Audio and Scarborough to the Nielsen portfolio our "FANALYTICS" platform—what we refer to as the collective intelligence and insights around sports consumers—continues to evolve, helping our clients gain a deeper understanding of the sports fan.

Speaking of fans, their passion for sports, in the U.S. and around the globe, continues to grow. And Nielsen was there every step of the way in 2013 capturing fans' engagement:

- Nearly 109 million viewers watched the "Harbowl," the Beyonce halftime show and the blackout.
- Viewers sent 27 million Tweets during the NBA Finals as the Miami Heat repeated as champs.
- The series-clinching game six of the Stanley Cup final was watched by 8.1 million viewers.
- Seventy one percent of UK homes' TV sets were tuned to the Wimbledon final as Andy Murray become the first male Brit to win the title in 77 years.
- Over 21.6 million German viewers, accounting for 61 percent of German households, watched the UEFA Champions League Final match in May (Bayern Munchen vs. Borussia Dortmund).

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

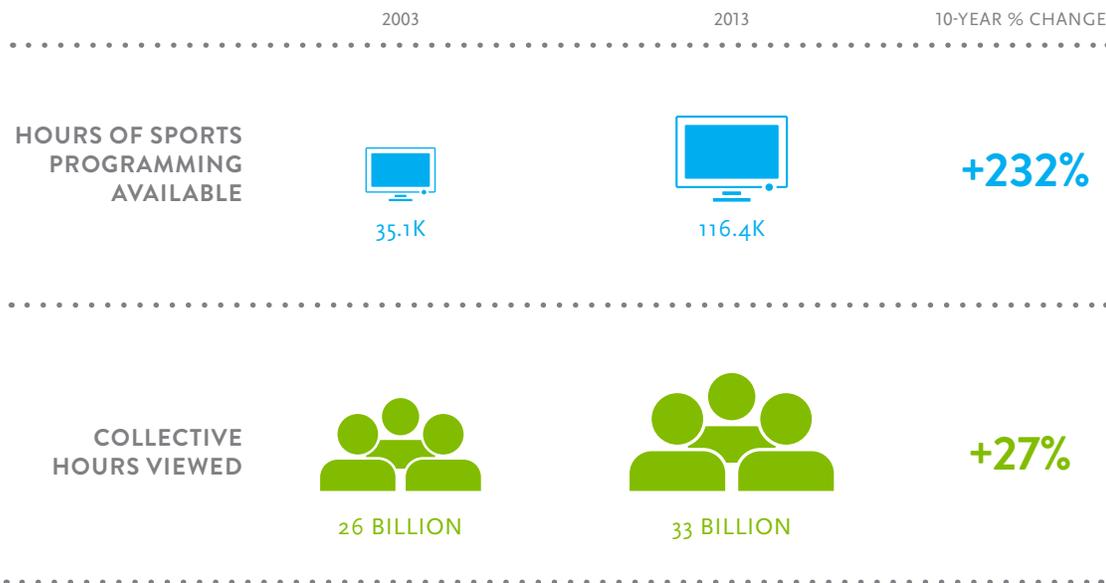
Sincerely,

Stephen Master
STEPHEN MASTER

HOW WE'RE ENGAGING WITH SPORTS CONTENT ON TV

Viewers' seemingly insatiable appetite for sports content has led to a proliferation of television options over the past ten years. And although more specialty sports channels have been added to the cable universe, there has also been a trend of non-sports channels adding additional hours of sports programming to their line-ups. Combined, these factors have contributed to an explosive 232 percent increase in available hours of national sports programming over the past ten years.

All of the additional sports content available has led to much greater consumption of sports on television. In 2013, over 33 billion hours of national sports programming was consumed by 255 million people in the U.S., which is up 27 percent from the 26 billion hours consumed in 2003.

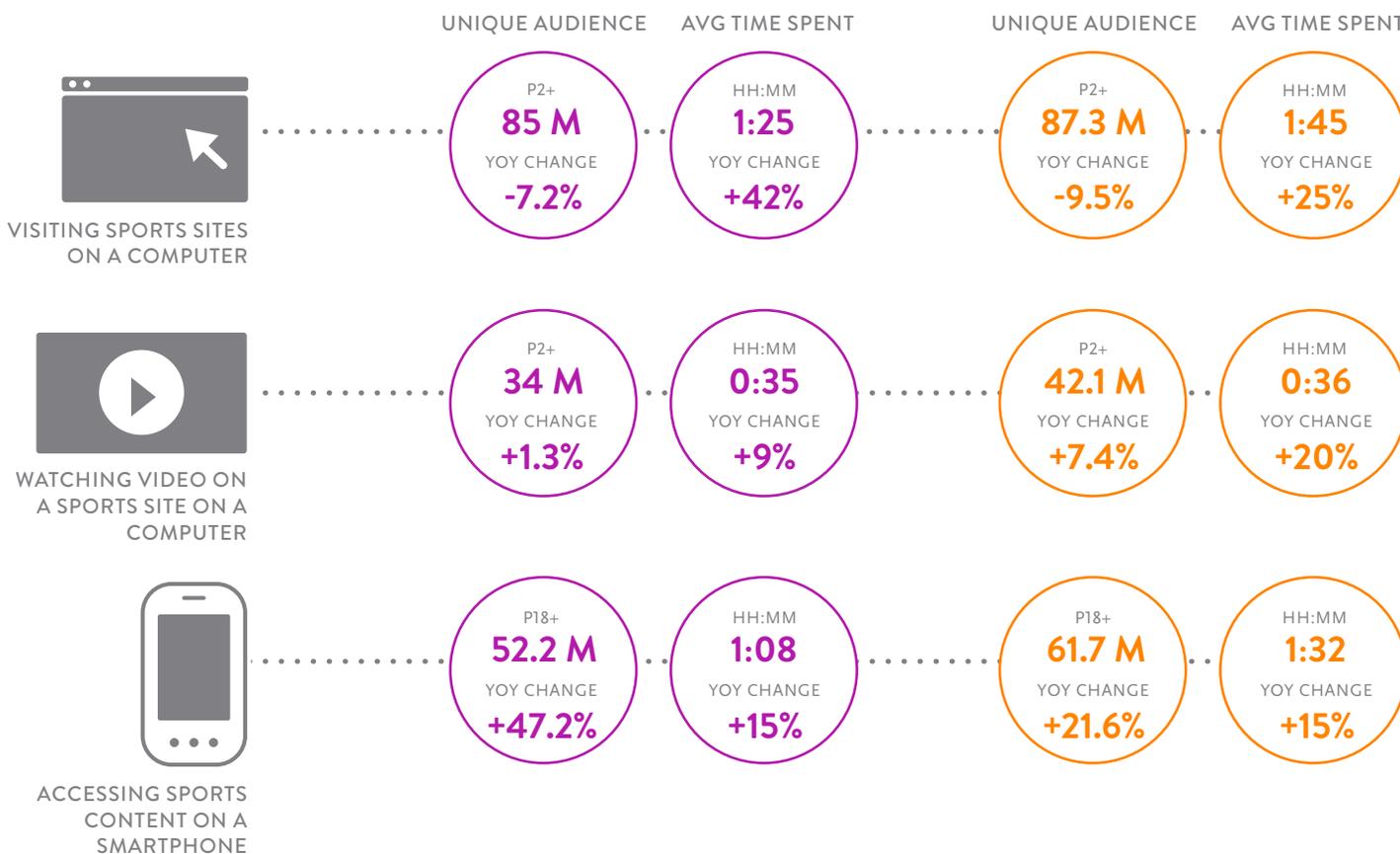


AND ACROSS OTHER SCREENS

Television is not the only medium where sports consumption is on the rise. This year we looked at Americans' consumption of sports content across other devices during two major sports months, April and September. During both months, Americans spent more time engaging with sports content across each platform compared to the prior year. The average amount of time spent visiting sports sites and accessing sports content on mobile phones in April 2013 increased by double digits compared to 2012, and fans spent about a quarter more time visiting sports sites and watching video on those sites during September.

Interestingly, the one figure that declined from 2012 to 2013 was the unique number of people that actually used their computer to visit a sports site, which can be attributed to the explosion of using mobile devices to access sports content (up 47% in April and up 22% in September).

● APRIL 2013 ● SEPTEMBER 2013



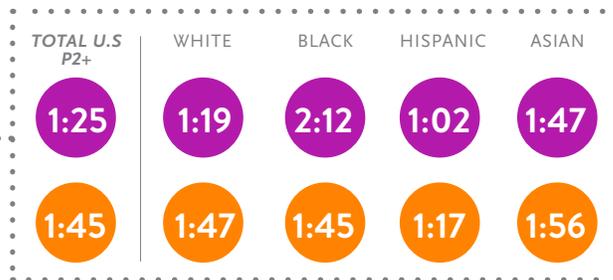
A MULTICULTURAL LOOK AT SPORTS CONSUMPTION

● APRIL 2013 ● SEPTEMBER 2013

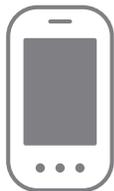
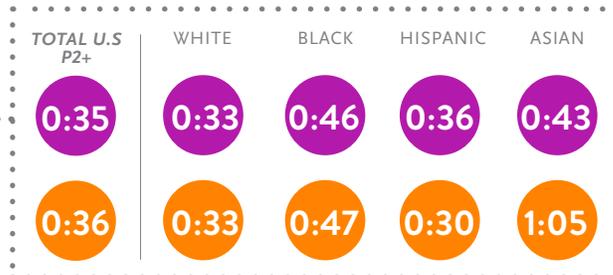
AVERAGE TIME SPENT (HH:MM)



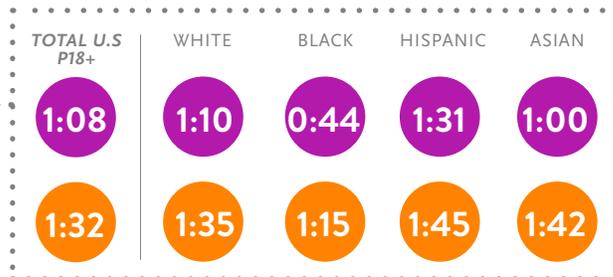
VISITING SPORTS SITES
ON A COMPUTER



WATCHING VIDEO ON
A SPORTS SITE ON A
COMPUTER



ACCESSING SPORTS
CONTENT ON A
SMARTPHONE



SPORTS CONTINUES TO DOMINATE TWITTER TV DISCUSSION

In 2013, sports events accounted for only 1.2 percent of all TV programming, yet conversation about sports made up nearly half of all Tweets about TV (49.7%), an increase of 7 percent from 2012. To put this in perspective, TV Series had the second greatest share of Twitter TV activity at 34 percent, however made up about 26.7% of all TV programming



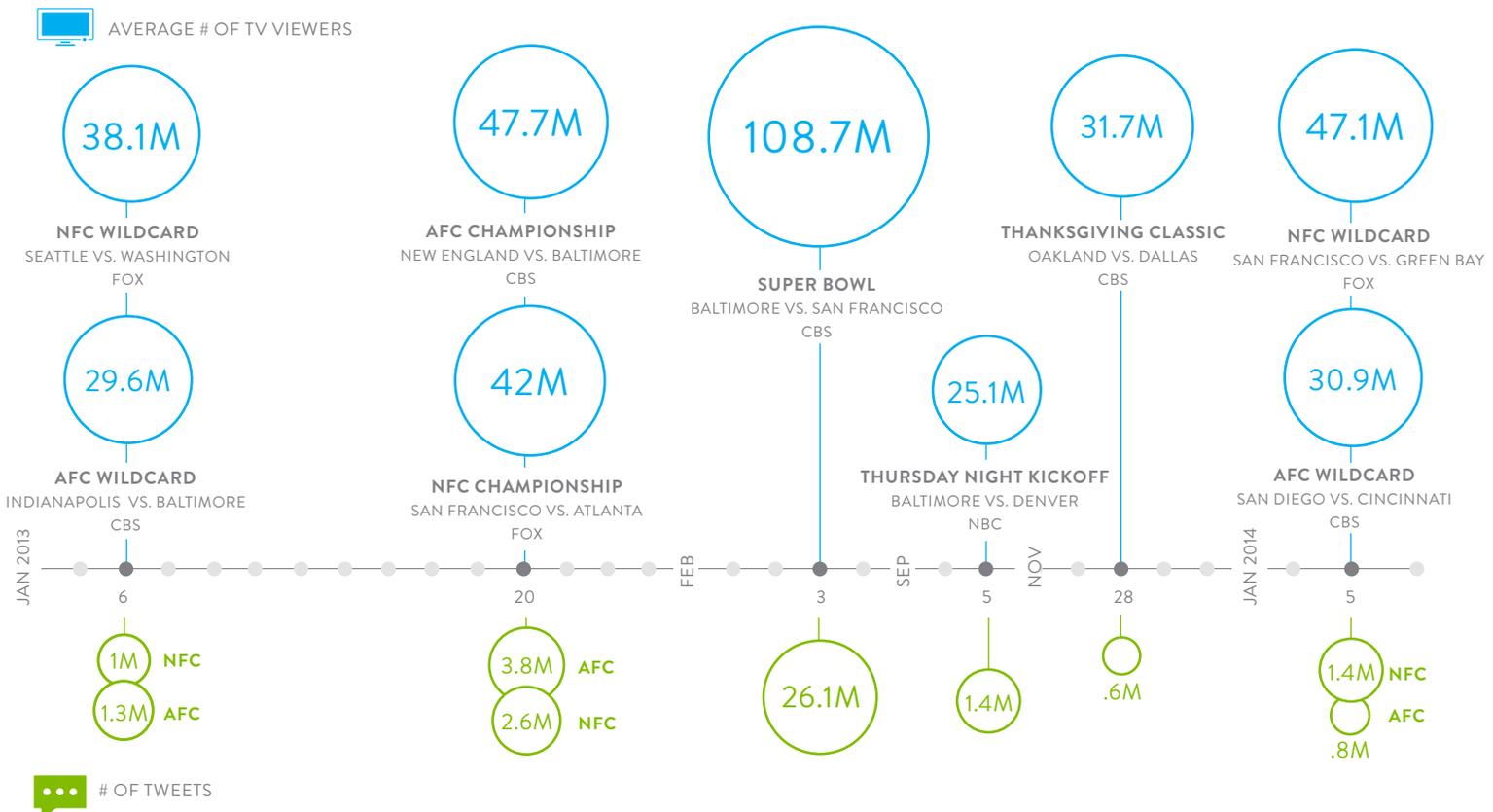
NFL

NATIONAL FOOTBALL LEAGUE

The packaged drama and plotlines of football continue to make the NFL a ratings juggernaut as Americans just can't seem to get enough football. During 2013, each of the five broadcasters carrying NFL games (NBC, FOX, CBS, ESPN, NFL NETWORK) saw an increase in viewership compared to last season. Peyton Manning's record-breaking season was a major story this year with the Broncos becoming "America's Team," as four of the six highest-rated NBC Sunday Night Football telecasts featured the Broncos.

Locally, the conference champions Broncos and Seahawks also posted strong regular season ratings. In Denver, 40 percent of homes tuned into a Broncos regular season game, up 23 percent over last season, and 34 percent of homes in Seattle watched, an increase of 31 percent from the prior year.

TIMELINE OF SEASON HIGHLIGHTS



FANTASY FOOTBALL APP USERS KEEP TRACK DAILY

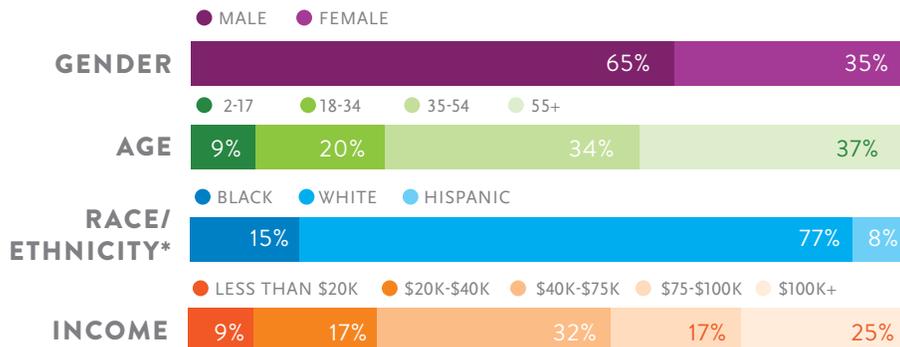
During September, more than 10 million Americans accessed fantasy football apps on their smartphones, up 15 percent from a year ago. Looking at the top fantasy football apps, Yahoo! and ESPN each had five million unique users, respectively, during September. Overall, fantasy football app users spent 2 hours 14 minutes per person, on average, using these smartphone apps during September 2013, and they opened them 27 times per person—that's almost once a day!

Top Fantasy Football Apps - September 2013 Ranked on Unique U.S. Audience			
Name	Unique Audience	Sessions Per Person	Time Per Person (hh:mm)
Total	10.3M	27.1	2:14
Yahoo!	5.1M	25.2	1:53
ESPN	4.9M	25.5	2:00
NFL.com	1.3M	30.1	1:53
CBS Sports	1.3M	12.2	0:41

SEASON-OVER-SEASON TV VIEWERSHIP:

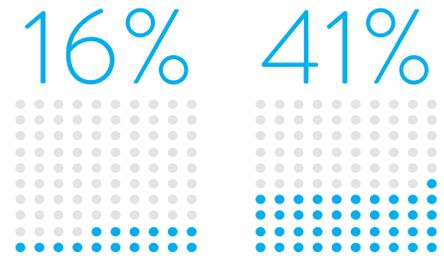


NFL DEMO PROFILE (2013 REGULAR SEASON):



Read as: During the 2013 NFL regular season, females made up 35 percent of the TV audience
*Numbers for Race/Ethnicity may not add up to 100 as viewers can identify as more than one group.

FAN INSIGHTS



Compared to the average U.S. adult, avid NFL fans are 16% more likely to have gone to a pizza place and 41% more likely to have consumed craft beer in the past month

TOP 5 NFL ADVERTISERS

- 1 Bud Light
- 2 Verizon Wireless
- 3 AT&T Wireless
- 4 Southwest Airlines
- 5 Direct TV

TOP 5 LOCAL FAN BASES

- 1 Green Bay Packers 88%
- 2 New Orleans Saints 81%
- 3 Pittsburgh Steelers 78%
- 4 Baltimore Ravens 70%
- 5 Kansas City Chiefs 69%

% of population that has watched, attended or listened to the team in the past 12 months



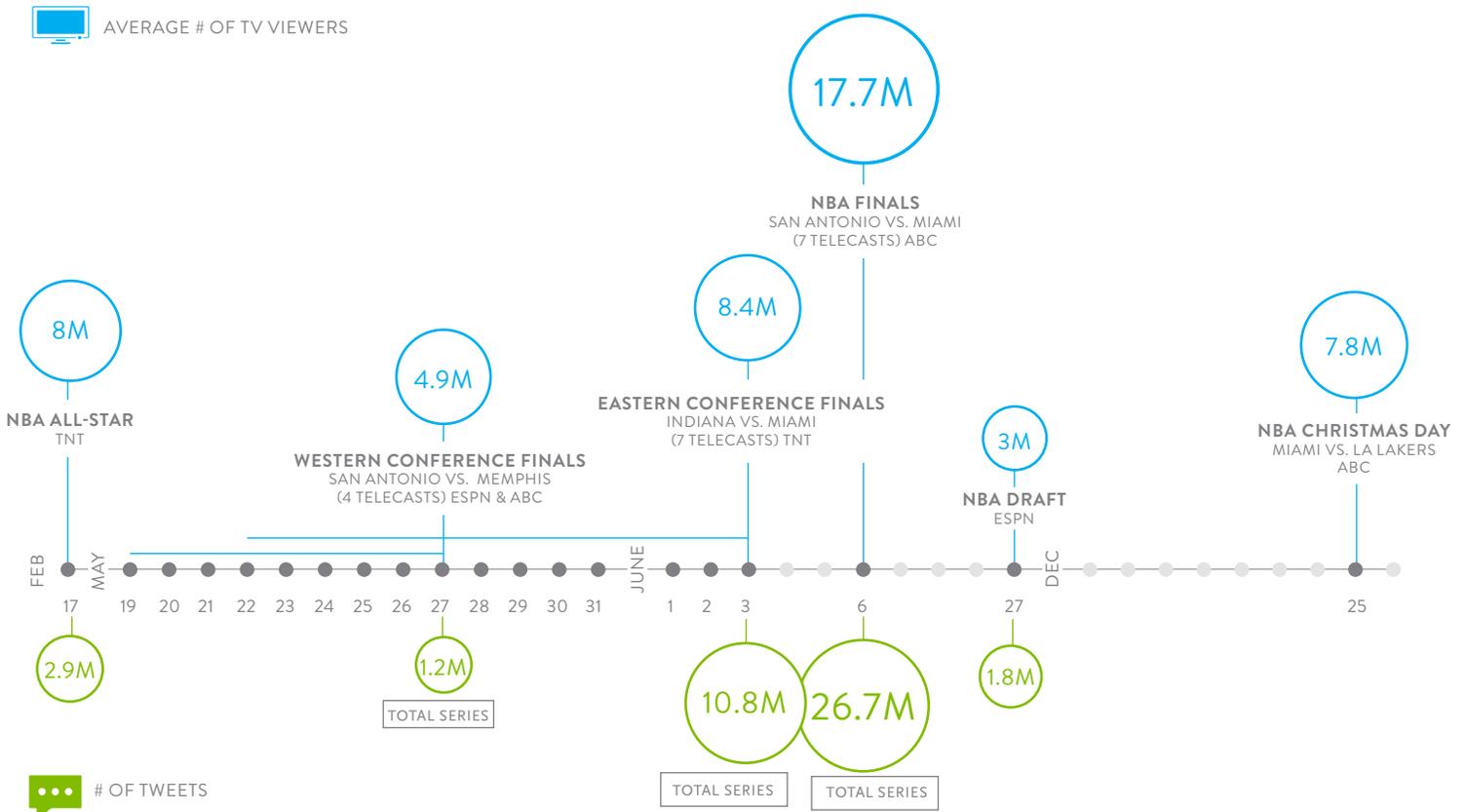
NBA

NATIONAL BASKETBALL ASSOCIATION

The fast-paced nature, high scoring games and iconic global superstars of the NBA has younger fans continuing to tune in. When looking at the NBA's regular season viewing audience, NBA marketers have a lot to be bullish about as the viewers are still skewing much younger than other sports. The 34 and under viewers comprise 45 percent of the total audience, for nationally televised regular season games.

In addition to skewing younger, NBA fans are also some of the most social ones, too. Over 7.3 million Tweets were sent by 1.9 million Unique Authors about the June 20th airing on ABC of the final game of the NBA Finals between the Heat and Spurs.

TIMELINE OF SEASON HIGHLIGHTS



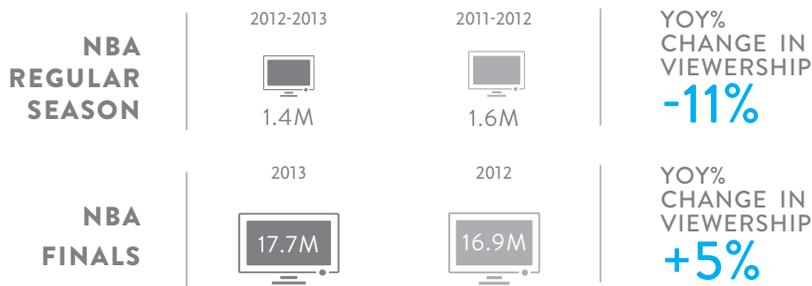
5 OF THE TOP 10 MOST-TWEETED ABOUT SPORTS EVENTS ARE NBA GAMES

Social media has fast become the new “water cooler” for fans to dish about the latest sports topics, prompting teams, leagues, advertisers and brands to take notice of the medium’s powerful connection with sports fans. And in 2013, fans and non-fans alike took to Twitter to dish on NBA games, positioning the league to have five of the ten most-Tweeted games in 2013. Games six and seven of the NBA Finals on ABC between the Miami Heat and San Antonio Spurs drew significant Twitter activity, with viewers sending 7.8 million and 7.4 million Tweets during the game, respectively. Only Super Bowl XLVII drew more Twitter activity among TV viewers in 2013.

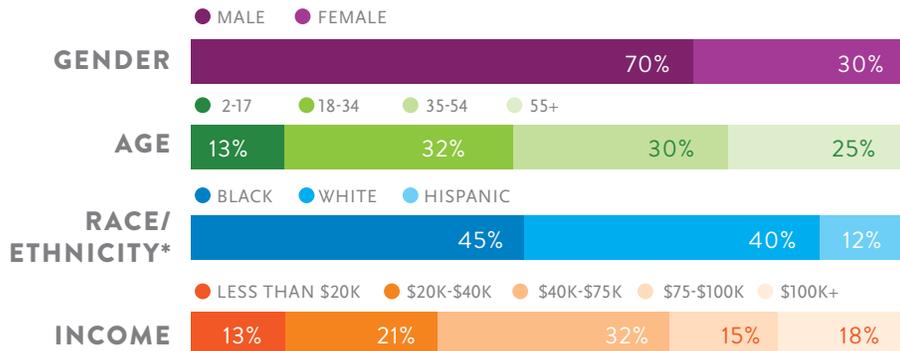
TOP 5 NBA SPORTS EVENTS BY # OF TWEETS: (JAN-NOV 2013)

2013 NBA FINALS (6/18) San Antonio Spurs at Miami Heat ABC 7.8M	2013 NBA ALL-STAR GAME (2/17) TNT 2.9M
2013 NBA FINALS (6/20) San Antonio Spurs at Miami Heat ABC 7.4M	NBA BASKETBALL (6/3) Indiana Pacers at Miami Heat TNT 2.8M
	2013 NBA FINALS (6/11) Miami Heat at San Antonio Spurs ABC 2.8M

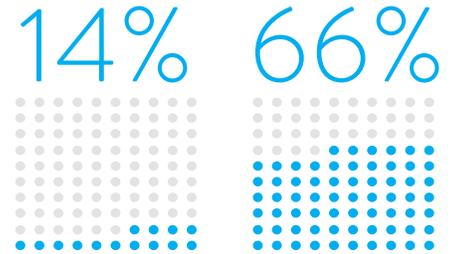
SEASON-OVER-SEASON TV VIEWERSHIP:



NBA DEMO PROFILE (2012-2013 REGULAR SEASON):



FAN INSIGHTS



Compared to the average U.S. adult, avid NBA fans are 14% more likely to have visited YouTube and 66% more likely to have used Twitter in the past month

TOP 5 NBA ADVERTISERS

- 1 Sprint Wireless
- 2 State Farm Insurance
- 3 Taco Bell
- 4 Microsoft Windows
- 5 KFC

TOP 5 LOCAL FAN BASES

- 1 Oklahoma City Thunder 64%
- 2 San Antonio Spurs 60%
- 3 Miami Heat 53%
- 4 Dallas Mavericks 46%
- 5 Chicago Bulls 45%

% of population that has watched, attended or listened to the team in the past 12 months



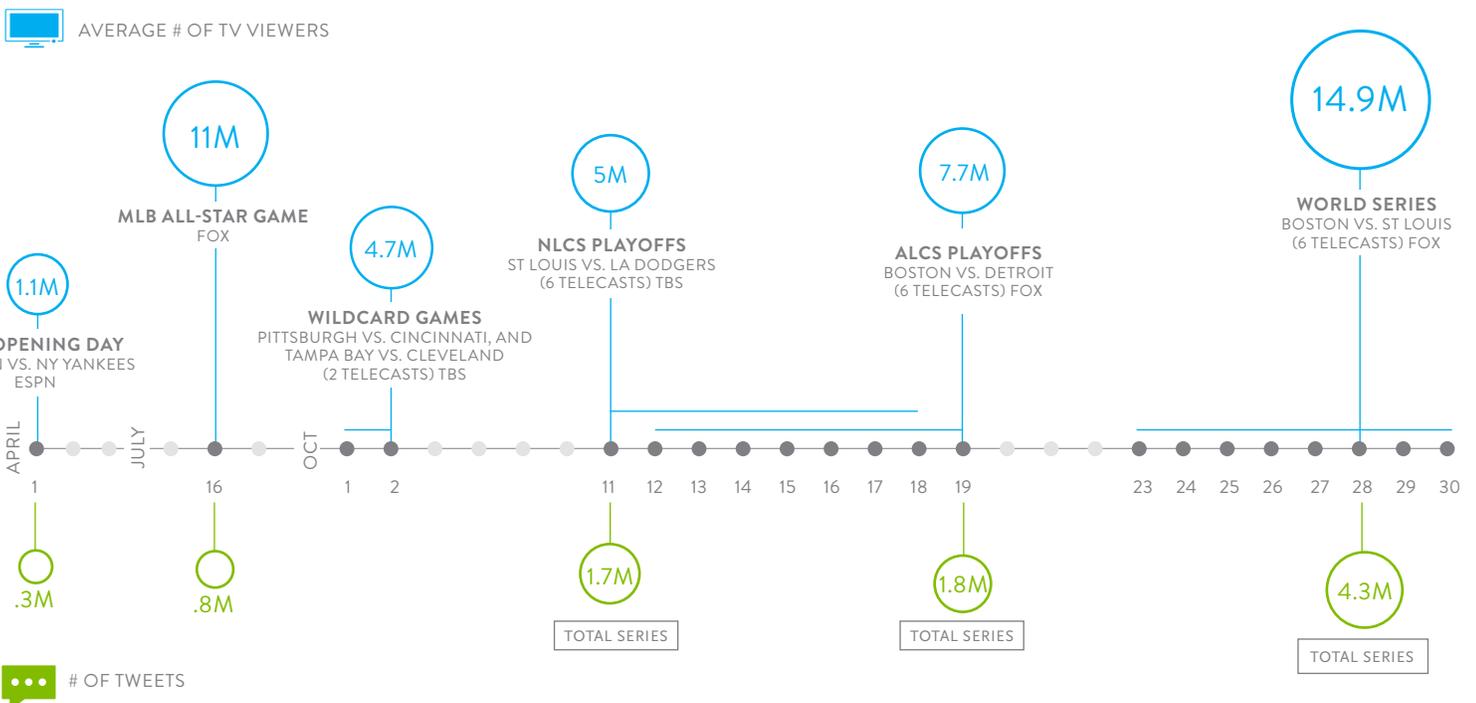
MLB

MAJOR LEAGUE BASEBALL

The Red Sox's incredible run to the World Series Championship was the story of the postseason, but the MLB regular season saw an incredible resurgence in the heartland. Towns like Pittsburgh, Cleveland and Kansas City who haven't had recent success on the diamond each had strong local viewership compared to last season, as the Pirates (+31%), Indians (+45%) and Royals (+71%) all enjoyed a big jump in their local ratings. Detroit and St. Louis have had more consistent success, and led their leagues in local household ratings with the Tigers averaging 9.6 and the Cards 8.7 in 2013.

Nationally, MLB regular season viewers are continuing to get older with the 55+ audience comprising 50 percent of the viewers, versus 41 percent ten seasons ago. As the audience skews older, it's also gotten wealthier with 21 percent of its viewing audience having household income of \$100K+ versus only 13 percent of its audience ten seasons ago.

TIMELINE OF SEASON HIGHLIGHTS



2013 WORLD SERIES HITS A HOME RUN WITH RADIO LISTENERS

Long considered America's pastime, baseball and radio seem to go hand-in-hand. MLB games, which typically draw a strong radio audience, saw out-of-the-park gains in male listeners aged 25-54 during the World Series in both the Boston and St. Louis metro areas. When looking at overall World Series radio listeners, St. Louis had a larger share of females who tuned in, while Boston's listeners were more affluent.

LOCAL AVERAGE GAME RADIO SHARE (MEN 25-54)

2013 Regular Season 2013 World Series % Change in Listeners (World Series v. Reg. Season)

BOSTON RED SOX	11.3%	35.1%	+211%
ST. LOUIS CARDINALS	22.6%	37.3%	+65%

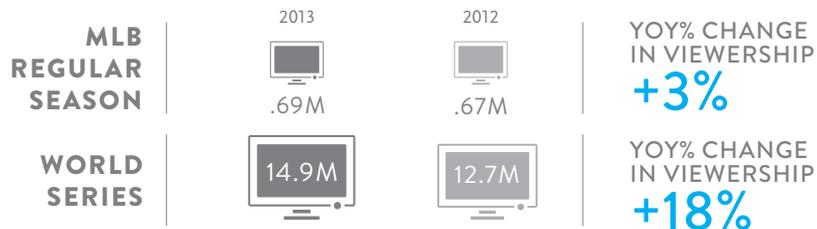
Read as: In the Boston metro area, men aged 25-54 accounted for 35 percent of the radio audience tuned to the 2013 World Series

2013 WORLD SERIES RADIO LISTENERS (P6+) - DEMO PROFILE

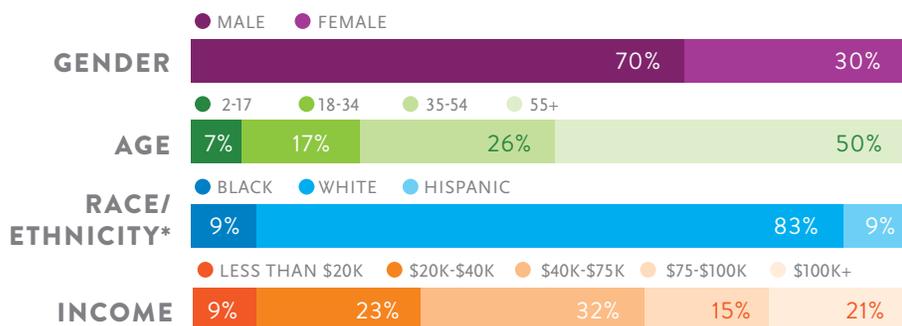
BOSTON RED SOX ST. LOUIS CARDINALS

	MALE	71%	61%
	FEMALE	30%	39%
	HIGHSCHOOL	25%	25%
	SOME COLLEGE	21%	26%
	COLLEGE GRAD	43%	43%
	\$25-\$50K	9%	20%
	\$50-\$75K	17%	18%
	\$75K+	64%	52%

SEASON-OVER-SEASON TV VIEWERSHIP:

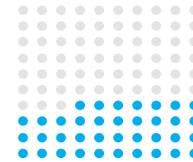


MLB DEMO PROFILE (2013 REGULAR SEASON):



FAN INSIGHT

37%



Compared to the average U.S. adult, avid MLB fans are 37% more likely to have taken 10 or more domestic air round trips in the past 12 months

TOP 5 MLB ADVERTISERS

- 1 Verizon Wireless
- 2 Taco Bell
- 3 Viagra RX
- 4 Samsung Galaxy S III
- 5 Budweiser

TOP 5 LOCAL FAN BASES

- 1 St. Louis Cardinals 76%
- 2 Cincinnati Reds 69%
- 3 Detroit Tigers 68%
- 4 Boston Red Sox 66%
- 5 Milwaukee Brewers 65%

% of population that has watched, attended or listened to the team in the past 12 months



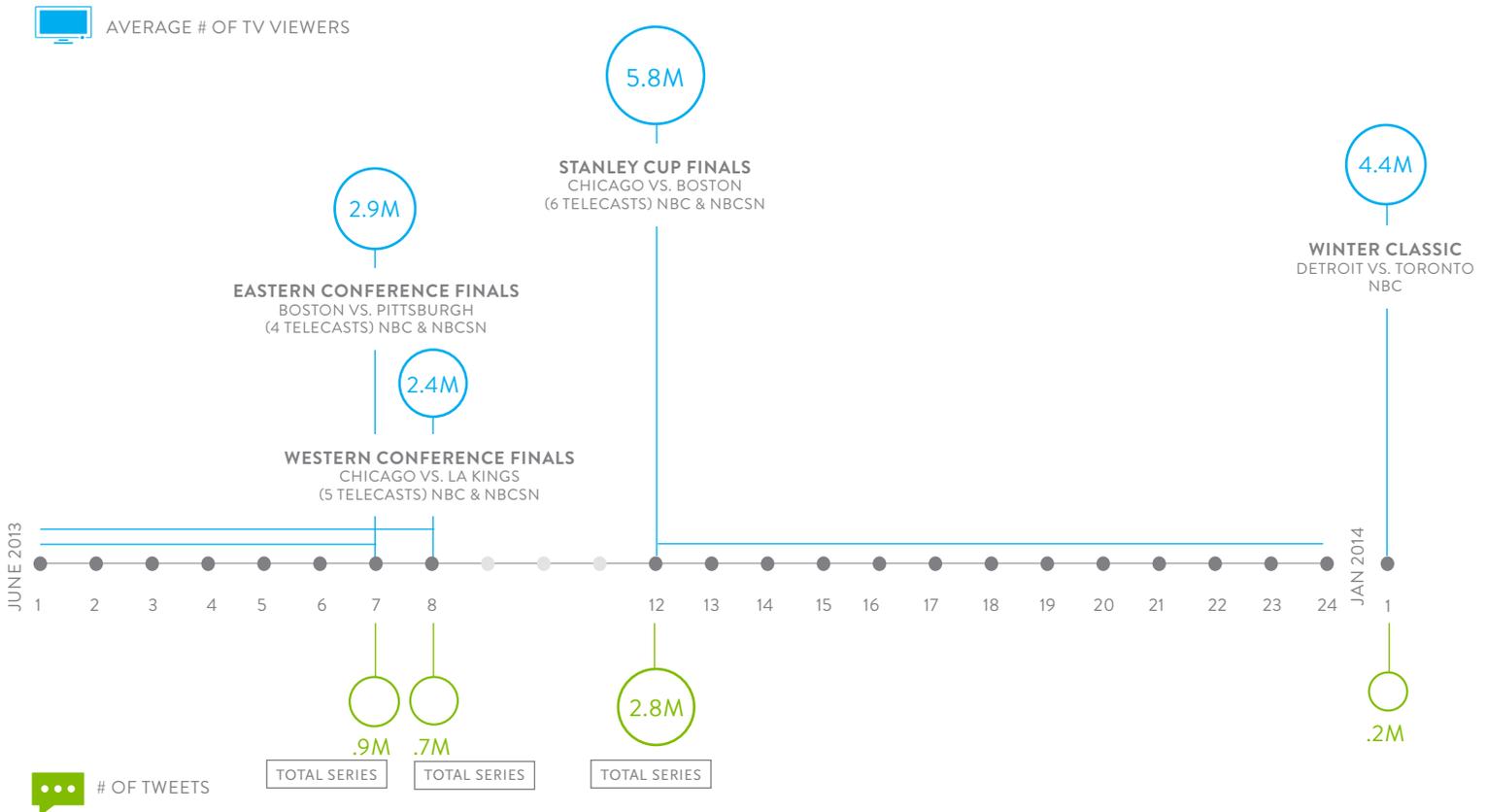
NHL

NATIONAL HOCKEY LEAGUE

Absence definitely made the heart grow fonder for NHL fans in 2013. Despite a labor dispute that culminated in a lockout and a strike shortened regular season of only 48 games, the NHL regular season average viewership increased by almost 20 percent in 2013 versus the prior season, albeit over a shorter period of time.

Over the past ten years, NHL regular season viewership continues to skew more affluent. Over half (53%) of the NHL's viewing audience for nationally televised regular season games in 2013 came from households earning over \$75K, compared to only 27 percent of its audience ten seasons ago.

TIMELINE OF SEASON HIGHLIGHTS



RECORD-SETTING STANLEY CUP FINALS BY THE NUMBERS

The 2013 Stanley Cup Finals featured TWO of the original SIX NHL teams (Chicago Blackhawks, Boston Bruins), THREE overtime contests, including a TRIPLE-overtime in Game ONE

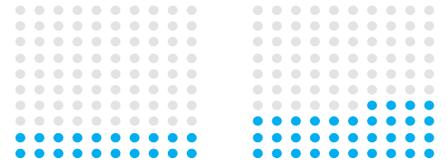
Series-clinching Game SIX was watched by **8.2 million viewers** on NBC, up 66 percent from Game 6 in 2012, making it the second-most watched Game 6 since 1994

The Stanley Cup Finals averaged **5.8 million viewers** (NBC and NBC Sports Network), becoming the most-watched Finals on record

Overall, the 2013 Stanley Cup Playoffs averaged **1.5 million viewers** (across NBC, NBC Sports Network and CNBC), making it the most-watched post-season since 1997

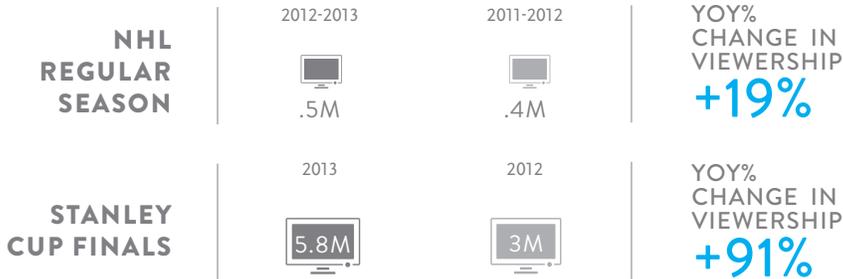
FAN INSIGHTS

20% 34%

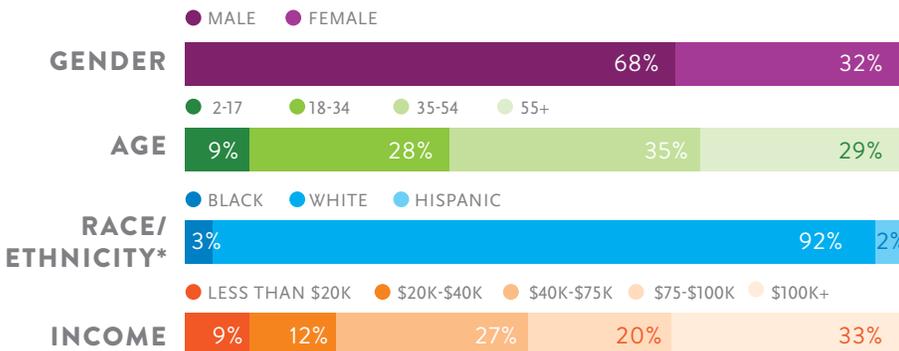


Compared to the average U.S. adult, avid NHL fans are 20% more likely to own a smartphone and 34% more likely to own a tablet

SEASON-OVER-SEASON TV VIEWERSHIP:



NHL DEMO PROFILE (2012-2013 REGULAR SEASON):



TOP 5 NHL ADVERTISERS

- 1 Discover Credit Card
- 2 Geico Auto Insurance
- 3 Coors Light
- 4 MYCLEANPC.COM
- 5 Subway

TOP 5 LOCAL FAN BASES

- 1 Pittsburgh Penguins 54%
- 2 Buffalo Sabres 48%
- 3 Detroit Red Wings 45%
- 4 Boston Bruins 41%
- 5 St. Louis Blues 33%

% of population that has watched, attended or listened to the team in the past 12 months



MOTOR SPORTS

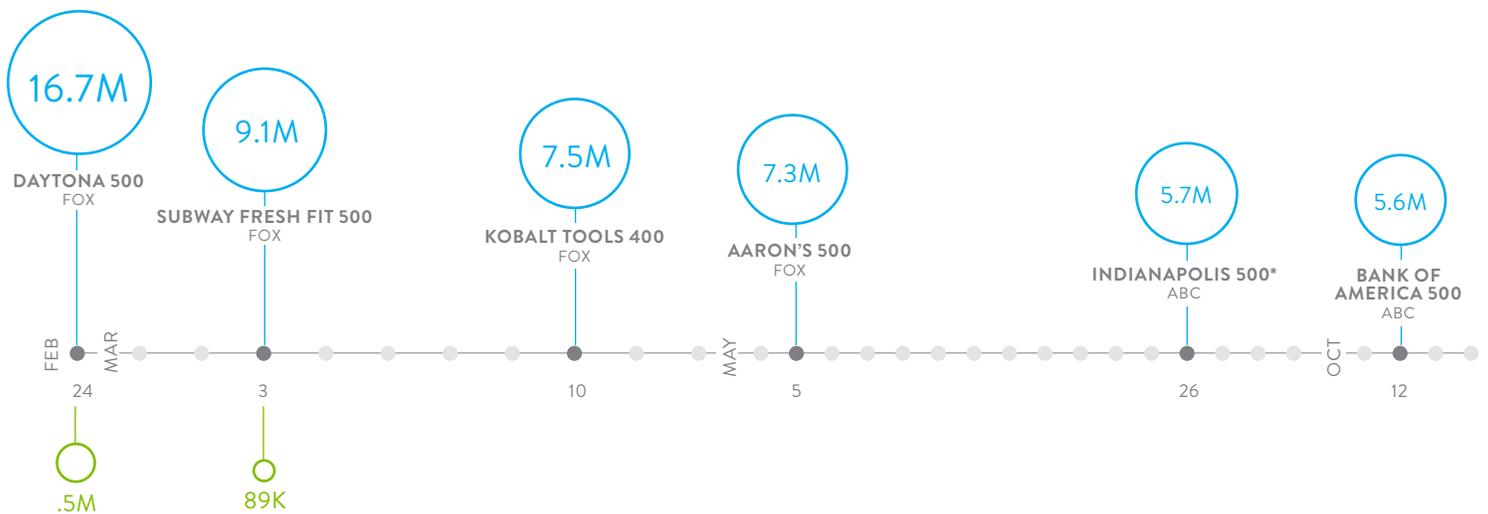
NASCAR AND INDY RACING*

One of the most well-known personalities in motorsports, Danica Patrick, has seemingly had an impact on TV viewership since she shifted from the IndyCar series to NASCAR two years ago. Case in point: In 2013, Indianapolis 500 viewership declined 17 percent versus the prior year. On the other hand, the 2013 Daytona 500, where Danica became the first female driver to win a pole and ultimately finished eighth, saw a 22 percent increase in viewing compared to 2012.

Danica's presence certainly generates buzz among race fans, and the Sprint Cup Series has a long track record of attracting a strong female audience in particular. Over the past ten years, NASCAR's top series has consistently boasted the highest share of female viewers among any major sports property regularly aired on TV (37%).

TIMELINE OF SEASON HIGHLIGHTS

AVERAGE # OF TV VIEWERS



OF TWEETS

TOP NASCAR TV ADVERTISER CATEGORIES

Motor sports are an advertiser's dream, offering prime advertising real estate in the form of cars, helmets, and drivers' uniforms—basically anywhere you can find space. This unique advertising format draws an eclectic mix of brands across a variety of categories, and the television advertisers who promote their goods during NASCAR races are just as diverse. Auto advertisers continue to spend the most ad dollars on NASCAR events, while motion picture advertisers showed the largest year-over-year increase in spending among the top advertiser categories.

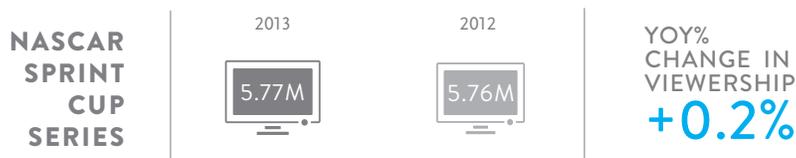
TOP 10 TELEVISION AD SPEND CATEGORIES - NASCAR RACES

Q4 2012 - Q3 2013, TOTAL TV SPEND ON BROADCAST & CABLE

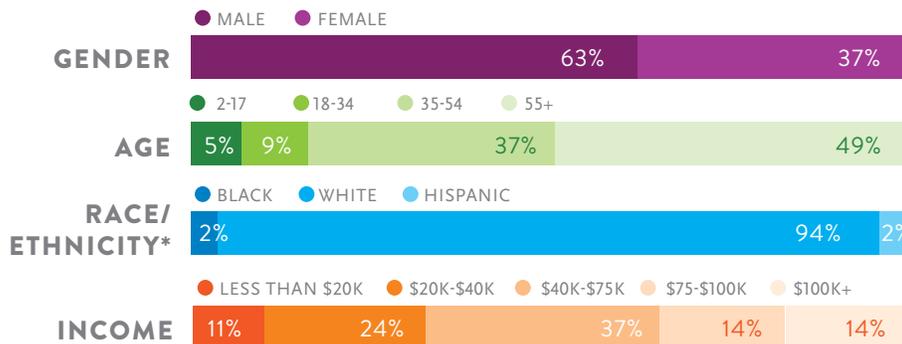
● Share of Total NASCAR Ad Spend ● YOY % Change in Ad Spend

Autos, trucks & misc. vehicles - factory	17%	+16%
Communication & public utilities	12%	-14%
Restaurants, hotel dining & night clubs	9%	-1%
Medicines & proprietary remedies	9%	+30%
Organizations	7%	+5%
Retail stores	6%	-6%
Proper casualty & ins	6%	-28%
Soft drinks & bottled waters	4%	+26%
Motion pictures	3%	+60%
Beer & wine	3%	+3%

SEASON-OVER-SEASON TV VIEWERSHIP:

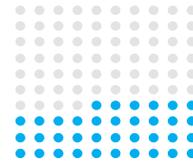


NASCAR DEMO PROFILE (2013 SPRINT CUP SERIES):



FAN INSIGHTS

36%



Compared to the average U.S. adult, avid NASCAR fans are 36% more likely to plan to buy a new full-size car and twice as likely to plan to buy a new pickup truck, in the next 12 months

TOP 5 NASCAR ADVERTISERS

- 1 Chevrolet Silverado
- 2 AT&T Wireless
- 3 KFC
- 4 Budweiser
- 5 Sprint Wireless

TOP 5 TWEETED DRIVERS @ DAYTONA 500

- 1 Danica Patrick 102K
- 2 Jimmie Johnson 21K
- 3 Brad Keselowski 9K
- 4 Dale Earnhardt Jr. 7K
- 5 Kyle Busch 6K

Activity includes all Tweets containing the keyword phrase as shown.



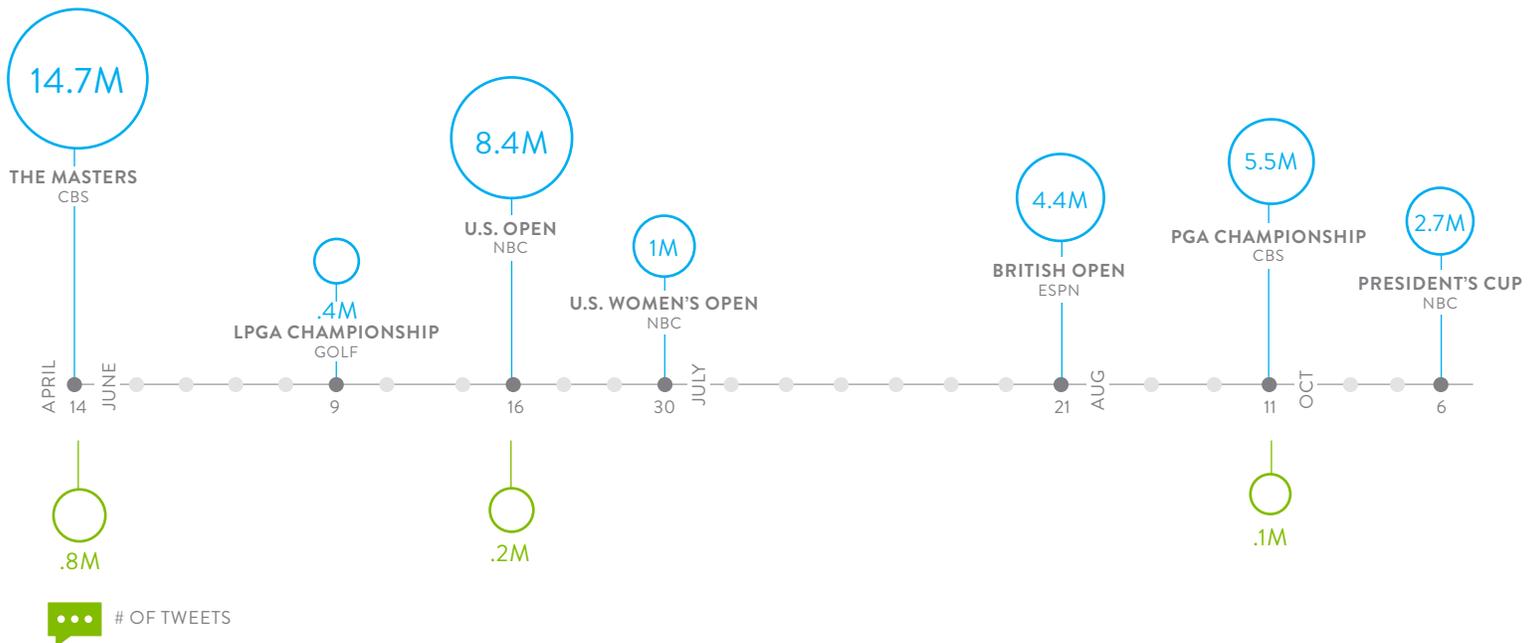
GOLF

With golf's biggest names turning in exciting performances this year, including Tiger Woods winning five tournaments and Phil Mickelson winning the British Open, golf fans had a lot of highlights to watch. The Final Round at the Masters, which is traditionally the most-watched golf event of the year, was one of those highlights, as viewership for Sunday's round increased 9 percent over 2012.

Although a number of young rising stars such as Rory McIlroy and Jordan Spieth have emerged over the past decade to challenge veteran champions Phil Mickelson and Tiger Woods, the young guns have not swayed golf's core viewing audience. Television viewership for golf tournaments on the broadcast networks (CBS and NBC) has remained almost the same over the past ten years: White (87%), older (63% aged 55+) and affluent (27% household income over \$100K).

TIMELINE OF SEASON HIGHLIGHTS

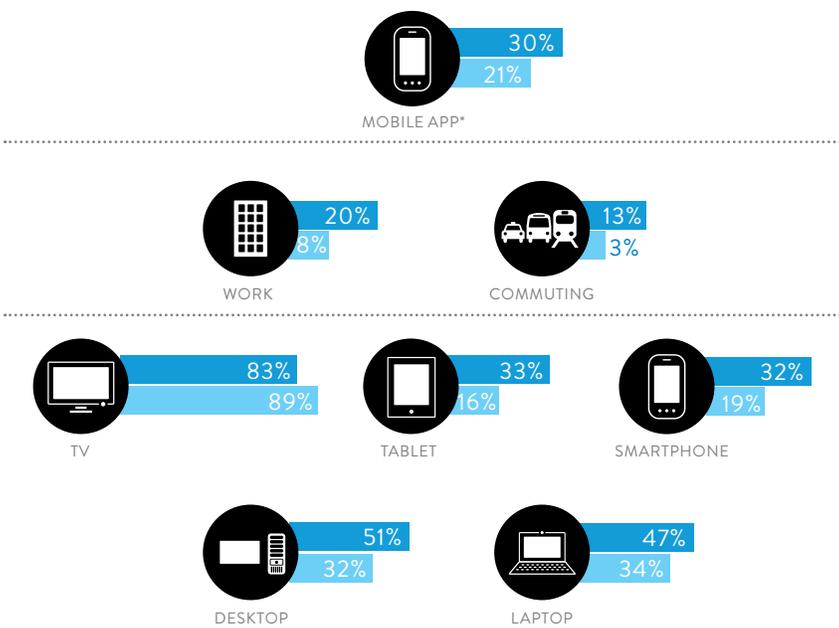
AVERAGE # OF TV VIEWERS



AVID GOLF FANS SKEW OLDER, RICHER & TECH SAVVY

The majority of avid golf fans are over the age of 55, but don't let their age fool you--they're also highly tech-savvy and access sports content on a variety of devices. Perhaps it's because the first two rounds of most tournaments are typically played during the work day on Thursday and Friday, avid PGA Fans are far more likely to consume sports content on mobile apps (30%), tablets (33%) and while at work (20%) than fans of other sports, and actually less likely to watch on TV.

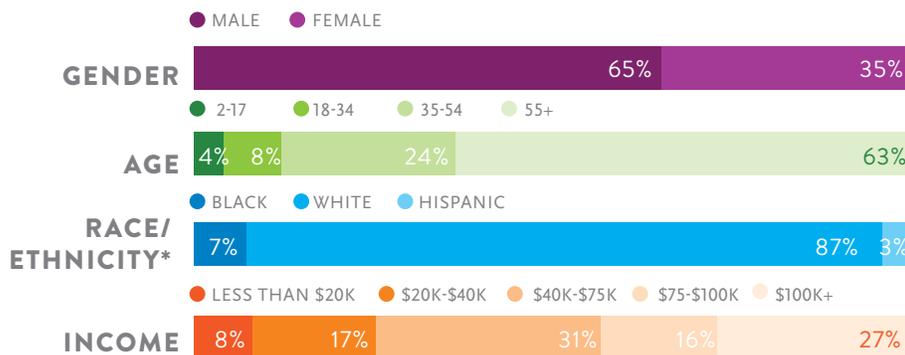
% OF FANS WHO ACCESS SPORTS CONTENT BY DEVICE AND LOCATION



Read as: 33% of avid PGA fans consumer sports content on a tablet

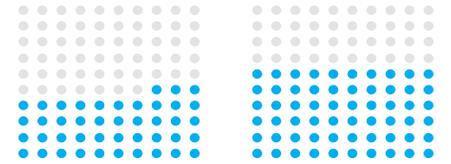
*Follow sports news

PGA DEMO PROFILE (2013 REGULAR SEASON):



FAN INSIGHTS

43% 60%



Avid PGA fans are 43% more likely to own second homes and 60% more likely to own stocks/stock options compared to the average U.S. household

TOP 5 PGA ADVERTISERS

- 1 Cialis RX
- 2 FedEx
- 3 Konica Minolta
- 4 Titleist Pro V1
- 5 IBM Business

TOP 5 TWEETED GOLFERS @ AUGUSTA

- 1 Adam Scott 234K
- 2 Tiger Woods 127K
- 3 Angel Cabrera 63K
- 4 Jason Day 30K
- 5 Brandt Snedeker 27K

Activity includes all Tweets containing the keyword phrase as shown.



SOCCER

With the World Cup set to kick off in June 2014 in Brazil, there was a lot of focus and excitement in the soccer world on a number of big World Cup qualifying matches that took place in 2013. In the U.S., the most-watched soccer match of the year was the qualifying match between U.S. and Mexico in March, which drew nearly 7 million viewers across the Spanish and English broadcasts.

Despite the retirement of David Beckham, the MLS still had strong viewership during its playoffs, which were up 9 percent compared to 2012. When looking at the MLS regular season TV audience, the viewership skewed young (40% under 34) and Hispanic (34%).

TIMELINE OF SEASON HIGHLIGHTS



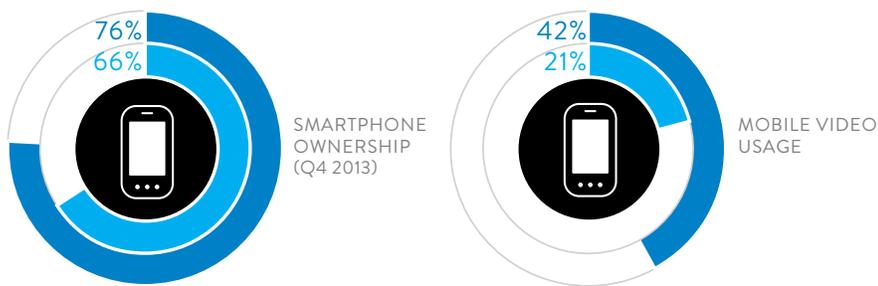
MLS: MOST LIKELY SMARTPHONE USER

Over the past year, a young, mobile, and tech savvy audience has embraced MLS in the U.S. Consider this: 52 percent of MLS fans who have expressed strong interest in attending live events and viewing games on TV are ages 18-34, the highest percentage of any pro league. Additionally, MLS fans are far more likely to be smartphone owners, with 76 percent of MLS fans owning a smartphone (Android & iOS) compared to 66 percent of the general U.S. population. And 42 percent of MLS fans have viewed mobile video in the past 30 days, compared to 21 percent nationally.

MLS: MOST LIKELY SMARTPHONE USERS

(Among smartphone subscribers aged 18+, Android and iOS only)

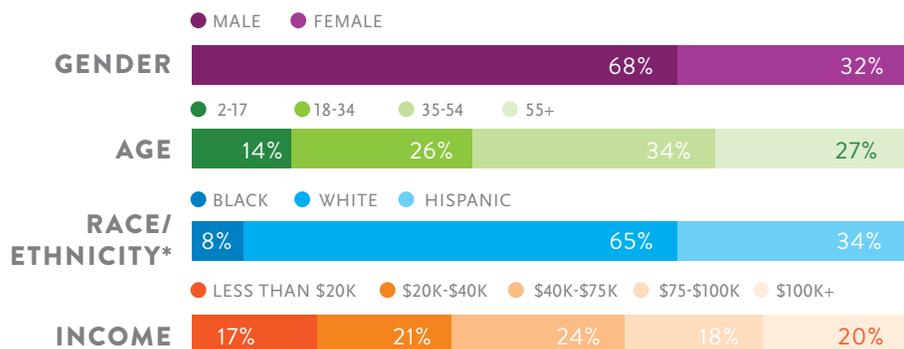
● MLS FANS ● ALL MOBILE SUBSCRIBERS



SEASON-OVER-SEASON TV VIEWERSHIP:

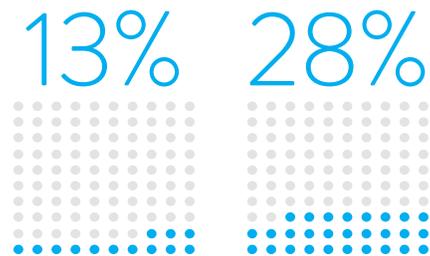


MLS DEMO PROFILE (2013 REGULAR SEASON^):



^English & Spanish language networks

FAN INSIGHTS



Avid MLS fans are 13% more likely than the average U.S. adult to engage in social networking and 28% more likely to spend 3 or more hours PER DAY on social networking sites

TOP 5 MLS ADVERTISERS

- 1 Continental Tires
- 2 Volkswagen Passat
- 3 Adidas Micoach
- 4 EA Sports
- 5 Gatorade G Series

TOP 5 MLS LOCAL FAN BASES

- 1 Seattle Sounders 21%
- 2 Sporting Kansas City 18%
- 3 Real Salt Lake 17%
- 4 Houston Dynamo 15%
- 5 Portland Timbers 14%

% of population that has watched, attended or listened to the team in the past 12 months



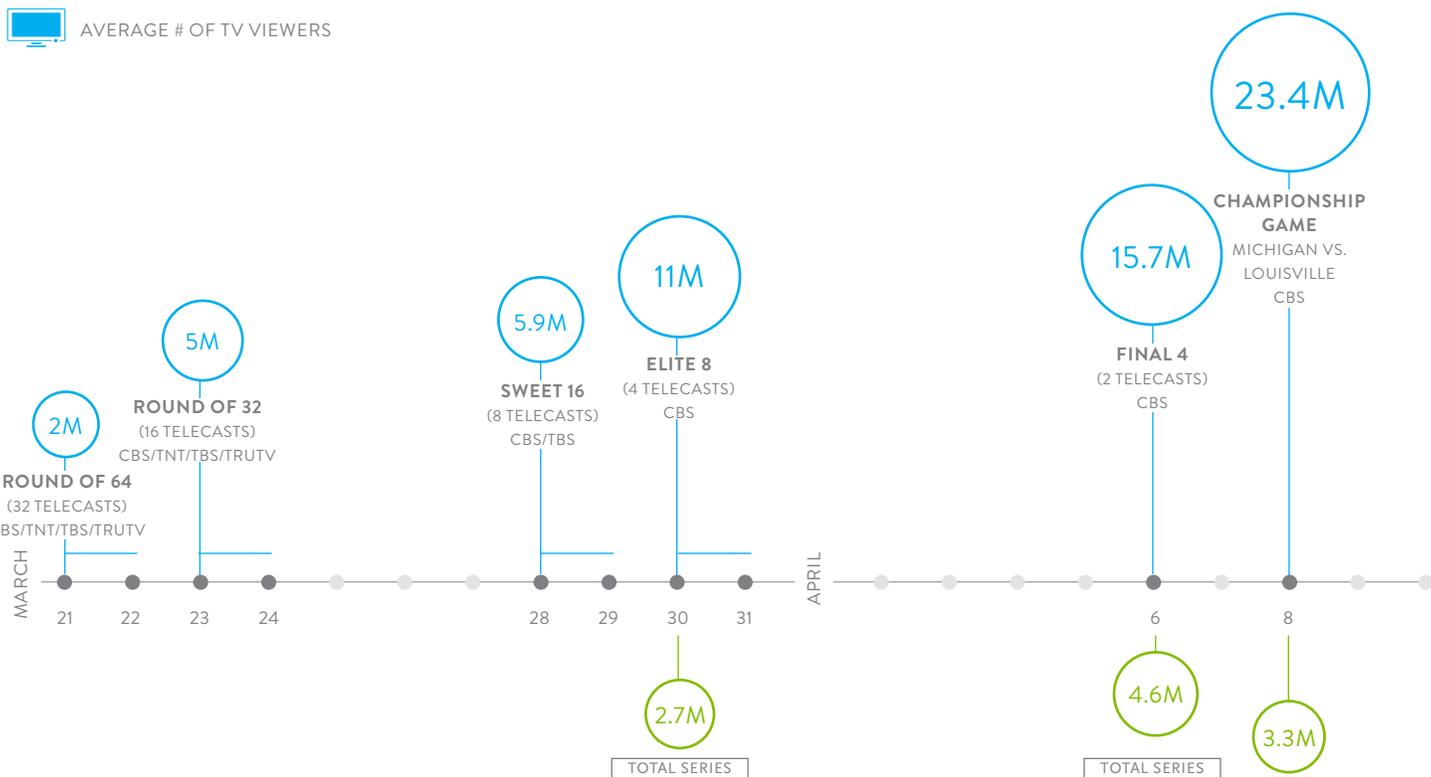
NCAA

BASKETBALL

Maybe it's all those brackets and office pools for March Madness, but the viewing audience for the NCAA Tournament definitely shifts from the NCAA Regular Season. During the regular season in 2012-13, the female audience accounted for less than 29 percent of total viewers, but climbed to 35 percent of the audience for the 2013 Tournament. Additionally, the audience gets more affluent come tournament time, as those with a household income of \$100K+ accounted for 23 percent of regular season viewers and 27 percent of the total March Madness audience.

The 2013 tournament also generated a significant amount of Twitter activity with the April 8 airing of Michigan vs. Louisville in the Championship Game on CBS, ranking as the most tweeted about telecast in the month of April.

TIMELINE OF SEASON HIGHLIGHTS



OF TWEETS

A CLOSER LOOK AT THE CONFERENCES

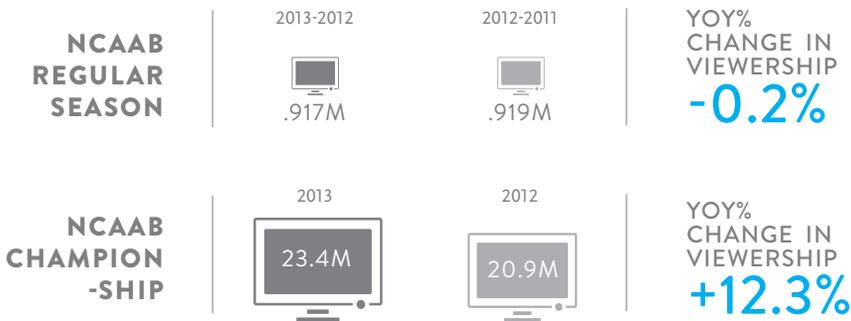
The ACC has long been thought of as the dominant and most popular basketball conference in the country, with North Carolina and Duke leading the way. However, throughout the 2012-13 regular season the Big 10's Indiana, Michigan, Michigan State and Ohio State were consistently near the top of the rankings and as a result led the pack in terms of TV viewership. On average, three million viewers tuned in for the top 10 nationally televised regular season games involving a team from the Big 10 conference.

TOP 10 GAMES BY AVERAGE VIEWERSHIP*

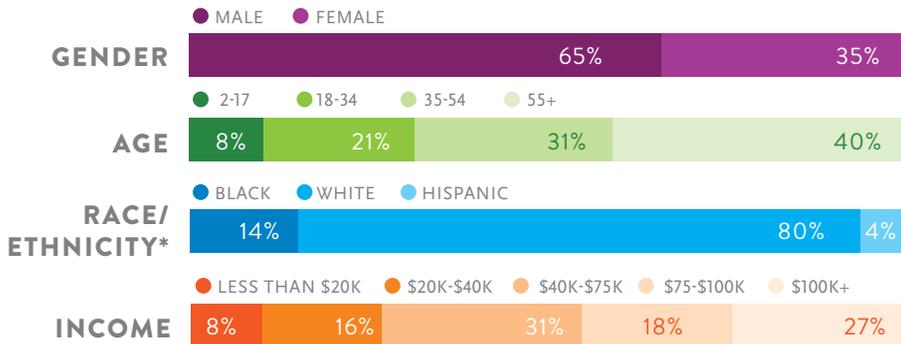


*top ten games involving specified conference

SEASON-OVER-SEASON TV VIEWERSHIP:

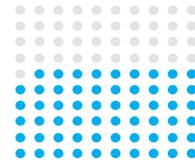


DEMO PROFILE (2013 NCAA TOURNAMENT):



FAN INSIGHTS

59%



Adults who visit NCAA.com are 59 percent more likely than the average U.S. adult to have purchased Sporting Goods within the last 6 months

TOP 5 NCAAB ADVERTISERS

- 1 AT&T Wireless
- 2 Bud Light
- 3 Capital One Credit Card
- 4 Southwest Airlines
- 5 Lowes

TOP 5 LOCAL FAN BASES

- 1 Kentucky Wildcats 67% (Lexington)
- 2 Louisville Cardinals 58% (Louisville)
- 3 Syracuse Orange 49% (Syracuse)
- 4 Ohio State Buckeyes 46% (Columbus)
- 5 Memphis Tigers 41% (Memphis)

% of population that has watched, attended or listened to the team in the past 12 months



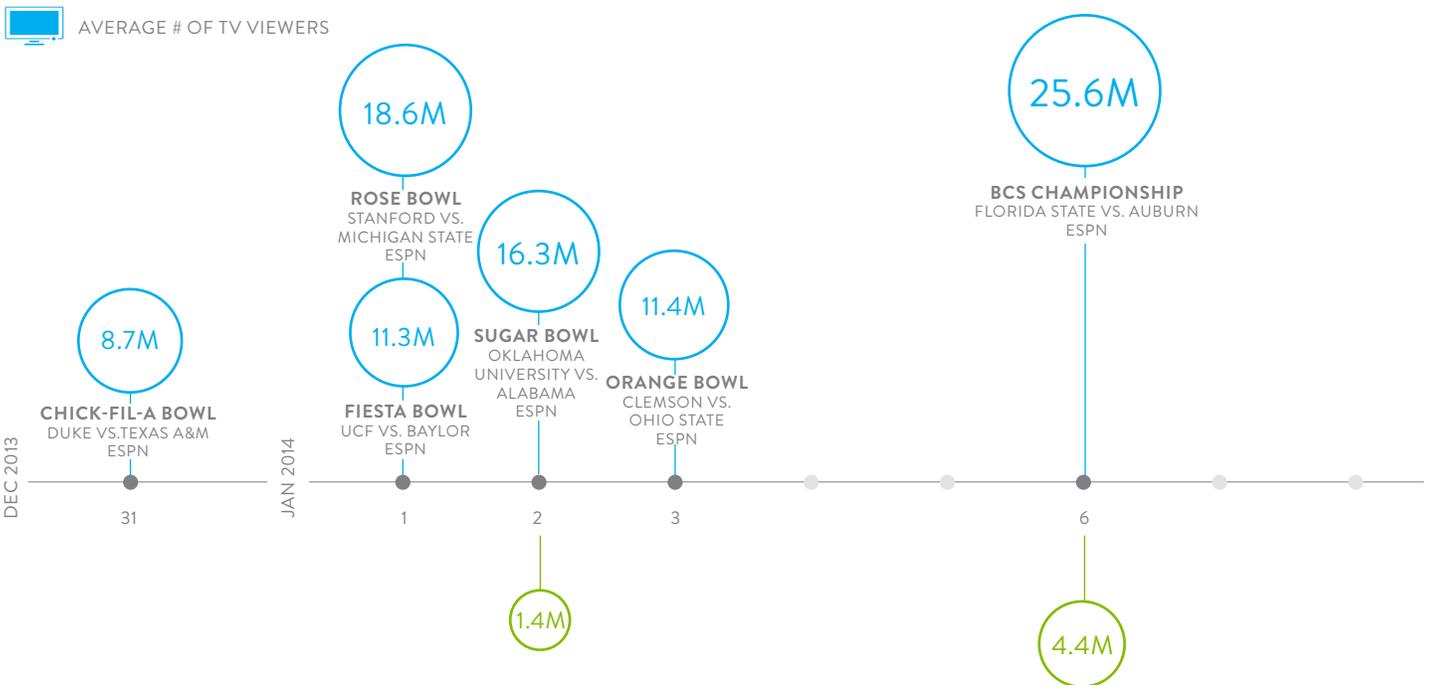
NCAA

FOOTBALL

Between the always-strong SEC, Florida State's BCS run in the ACC and strong seasons from Michigan State and Ohio State in the Big 10, college football aired a record 31 games nationally in 2013 (not including bowls), compared to only 22 games in 2012, which drew over 5 million viewers, on average.

ESPN's January 6th telecast of the 2014 Vizio BCS National Championship between Auburn and Florida State had over 25 million viewers and generated substantial Twitter activity (4.4 million Tweets by 1.2 million Unique Authors), surpassing last year's BCS game by almost 400 thousands Tweets. According to Nielsen SocialGuide, we also know that those Tweets about the game airing were seen by a Twitter TV Unique Audience of 10.4 million people.

TIMELINE OF SEASON HIGHLIGHTS



OF TWEETS

A CLOSER LOOK AT THE CONFERENCES

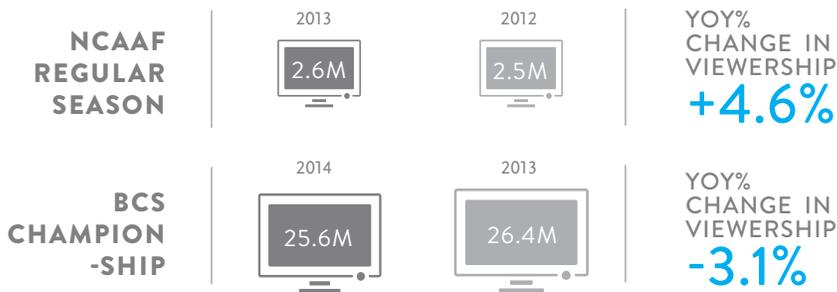
Despite the fact that the SEC's streak of seven BCS Championships in a row was finally snapped this year in dramatic fashion by Florida State, the conference enjoyed another banner year in terms of having the most viewed college football games of the 2013 season. Between Alabama's strong season and holding the top spot in the polls until the final week of the season, Auburn and Missouri's resurgence and "Johnny Football" lighting up the scoreboard for the Aggies, it is easy to see why the storylines in the SEC captured the college football viewership crown again. An astounding 9.7 million viewers, on average, tuned in for the top 10 nationally televised regular season games involving a team from the SEC.

TOP 10 GAMES BY AVERAGE VIEWERSHIP*

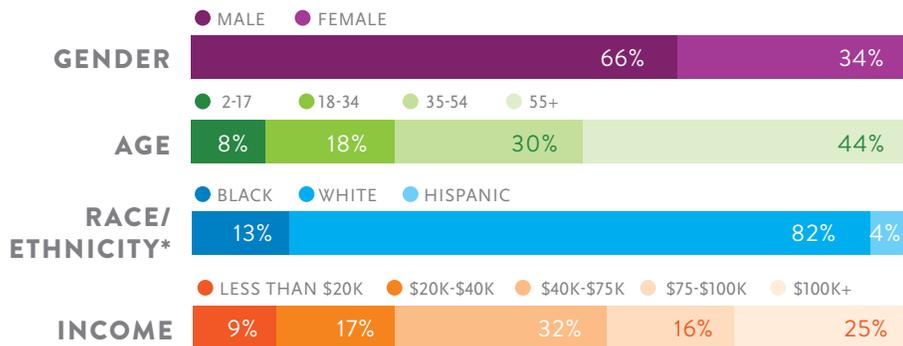


*top ten game involving specified conference/team

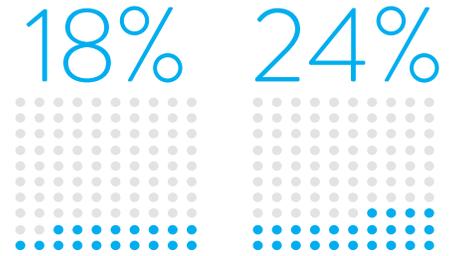
SEASON-OVER-SEASON TV VIEWERSHIP:



NCAA DEMO PROFILE (2013-2014 NCAA BOWL GAMES):



FAN INSIGHTS



Compared to the average U.S. adult, avid college football fans are 18% more likely to have life insurance and 24% more likely to belong to a health club

TOP 5 NCAAF ADVERTISERS

- 1 AT&T Wireless
- 2 Taco Bell
- 3 Aflac
- 4 Verizon Wireless
- 5 Home Depot

TOP 5 LOCAL FAN BASES

- 1 Ohio State Buckeyes 66% (Columbus)
- 2 Alabama Crimson Tide 65% (Birmingham)
- 3 Arkansas Razorbacks 58% (Little Rock)
- 4 Tennessee Volunteers 56% (Knoxville)
- 5 Oklahoma Sooners 55% (Oklahoma City)

% of population that has watched, attended or listened to the team in the past 12 months



A GLOBAL VIEW

In collaboration with Eurodata, this year we highlight the diversity of sports fans and their passions around the world. In the United States, the NFL and the Super Bowl reign supreme in TV ratings and viewer buzz. But, in other parts of the world and equally celebrated in other cultures are a wide array of sports and sporting events that draw the most viewers.

Soccer (futbol) holds the most sway with viewers across a wide range of markets throughout the world and netted the majority of the hours fans spent watching sports on television. In markets as diverse as Russia, Indonesia, Italy, South Africa and Spain, soccer is by far the most popular sport.

TV TIME IS SOCCER TIME

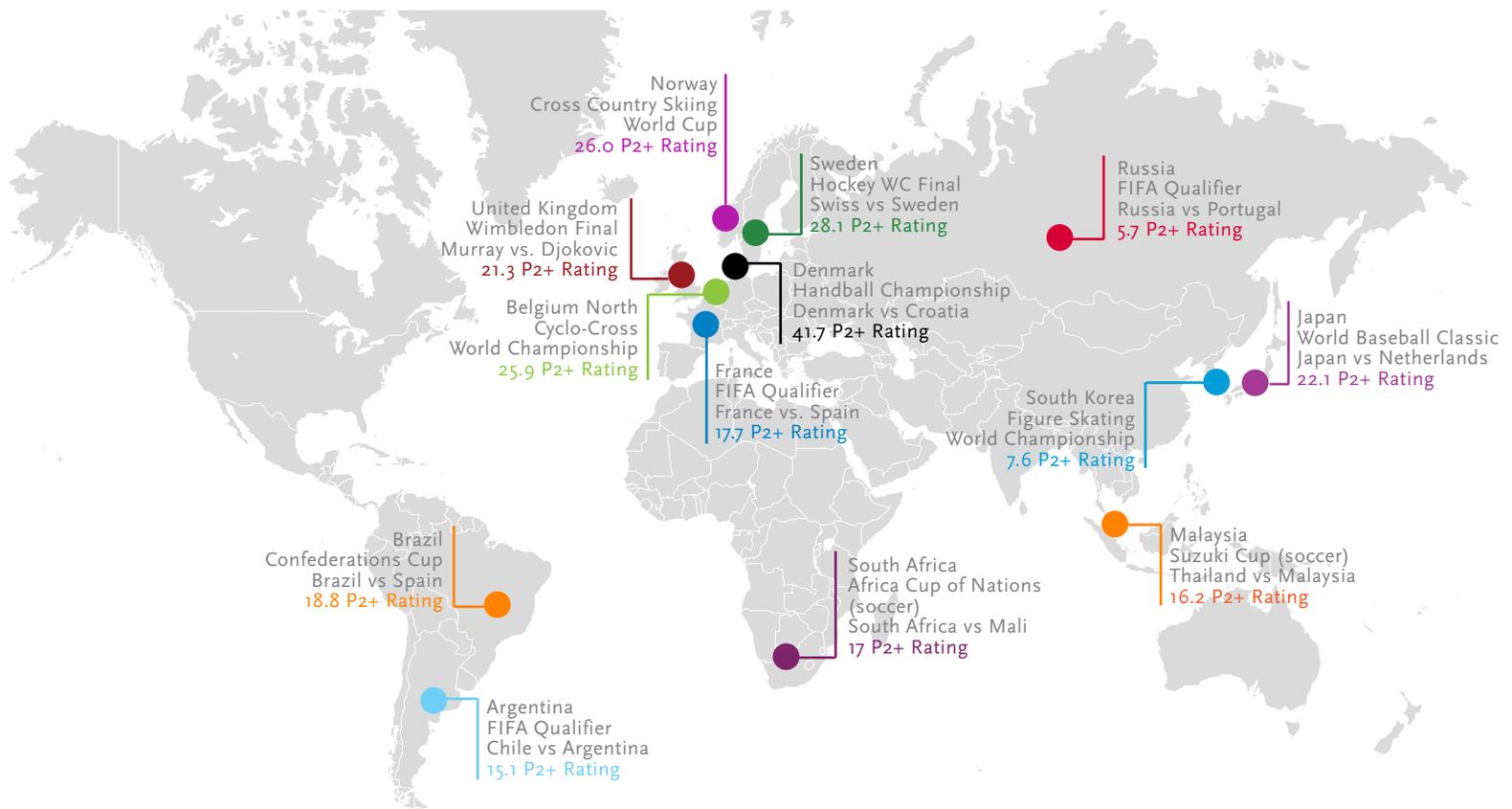
% OF SPORTS TIME SPENT WATCHING SOCCER



Read as: 23% of total time watching sports on TV in France was dedicated to soccer programs on generalist channels.
 Source: Eurodata TV Worldwide

MAJOR TV SPORTS EVENT GLOBALLY

Other countries have a distinct taste for other sports, however. In Denmark, the Handball Men's Championship on DR1 had nearly 80 percent of televisions in use at the time tuned into the event. In the UK, although a soccer mad country, the most viewed sporting event in 2013 was Andy Murray defeating Novak Djokovic at Wimbledon to become the first British man to win the title since 1936. Here are some other notable sports numbers from around the world:

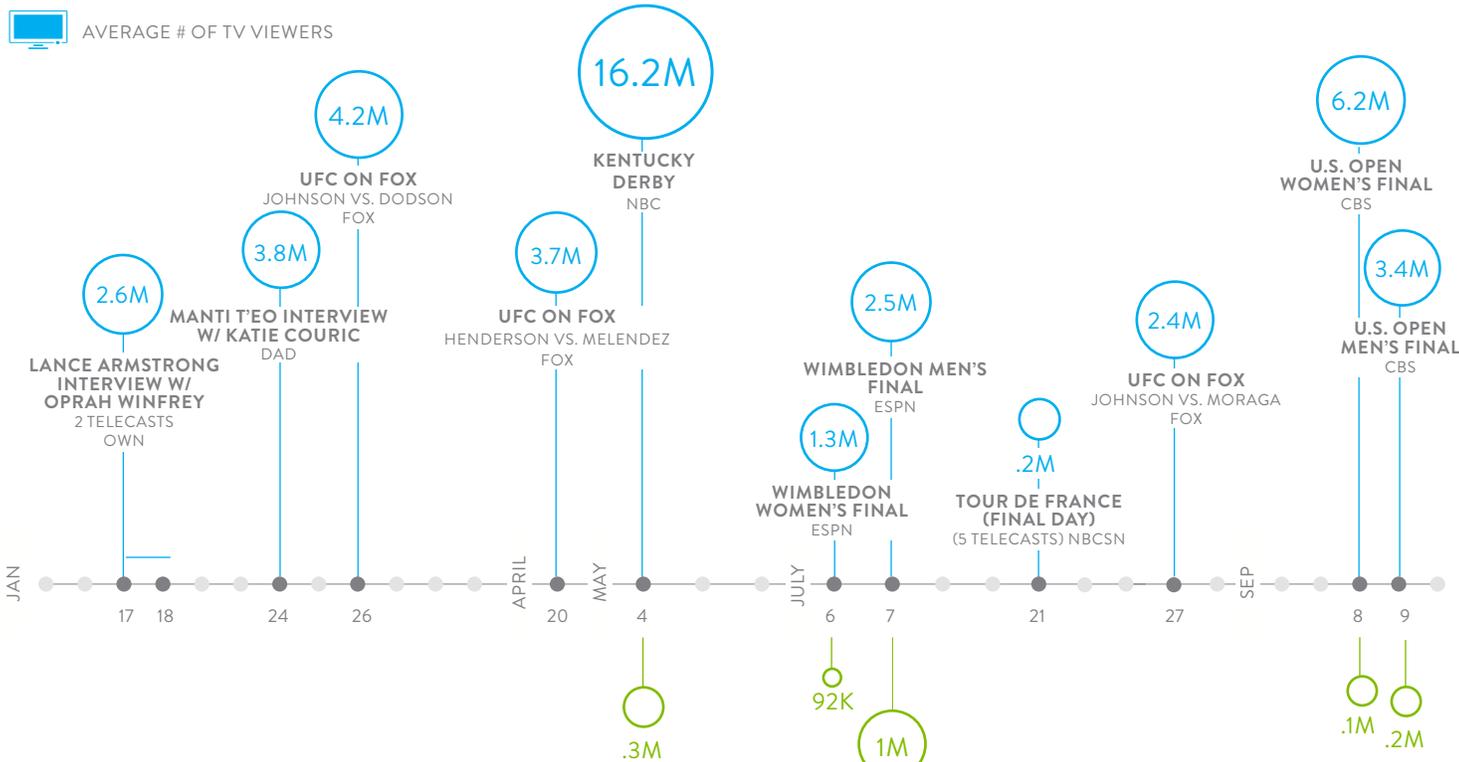


Read as: 17.7% of the TV universe in France tuned in to the FIFA WC Qualifiers France vs. Spain
 Source: Eurodata TV Worldwide



OTHER MARQUEE SPORTS PROGRAMMING

TIMELINE OF YEARLY HIGHLIGHTS



OF TWEETS

SOURCE PAGE

Page 3:

- Hours of programming and collective hours viewed: Nielsen National TV Toolbox *Originator Type: Network, Cable Syndication, Summary Type Codes: Sports Event, Sports News, Sports Anthology, Sports Commentary, P2+ and Live+SD, 1 min Qualifier. The Total Hours was calculated by multiplying the Reach Projection by Minutes viewed for each month throughout the year.

Page 4 & 5:

- Visiting Sports Sites: Nielsen Netview – Total Methodology. Apr 1 – Apr 30, Sep 1 – Sep 30.
- Watching Video on a Sports Site: Nielsen VideoCensus – Total Methodology. Apr 1 – Apr 30, Sep 1 – Sep 30.
- Accessing Sports Content on a Mobile Device: Nielsen Mobile Netview - Smartphones only. Apr 1 – Apr 30, Sep 1 – Sep 30.

NFL

- Timeline:
 - TV Viewers: Nielsen Galaxy Explorer, Jan 2013 – Jan 2014, P2+ and Live+SD
 - Social: Nielsen SocialGuide, Jan 2013 – Jan 2014.
- Fantasy Football App: Nielsen, Mobile NetView, September 2013
- Season-over-Season Viewership:
 - Regular Season: Nielsen Galaxy Explorer, Sep-Dec 2012, Sep-Dec 2013, P2+ and Live+SD. *Networks included: NBC, CBS, FOX, NFLN, ESPN.
- Demo Profile: Nielsen National TV Toolbox, Sep-Dec 2013, Live+SD *Networks included: CBS, FOX, NBC, ESPN, NFLN
- Fan Insights: Scarborough USA+ Release 1, 2013, P18+ (beer consumption measured among P21+)
- Top Advertisers: Nielsen Monitor Plus, Q4 2012 – Q3 2013, National TV.
- Top 5 Local Fan Bases: Scarborough local Release 1, 2013, P18+

NBA

- Timeline:
 - TV Viewers: Nielsen Galaxy Explorer, Feb – December 2013, P2+ and Live+SD
 - Social: Nielsen SocialGuide, Feb – June 2013.* Tweets were added up across all events in the Western Conference Finals, Eastern Conference Finals and NBA Finals.
- 5 of Top 10 Most-Tweeted Sports Programs are NBA Games: Nielsen SocialGuide, Jan – Nov 2013. Ranked on number of Tweets
- Season-over-Season Viewership:
 - Regular Season: Nielsen Galaxy Explorer, Dec 2011 – Apr 2012, Oct 2012 – Apr 2013, P2+ and Live+SD *Networks included: ESPN, TNT, ESPN2, NBA & ABC.
 - NBA Finals: Nielsen Galaxy Explorer, June 2012, June 2013, P2+ and Live+SD *Networks included: ABC.
- Demo Profile: Nielsen National TV Toolbox, Oct-Apr 2013, Live+SD *Networks included: ABC, ESPN, ESPN2, NBA-TV
- Fan Insights: Scarborough USA+ Release 1, 2013, P18+
- Top Advertisers: Nielsen Monitor Plus, Q4 2012 – Q3 2013, National TV.
- Top 5 Local Fan Bases: Scarborough local Release 1, 2013, P18+

MLB

- Timeline:
 - TV Viewers: Nielsen Galaxy Explorer, Apr – Oct 2013, P2+ and Live+SD
 - Tweets: Nielsen SocialGuide, Apr – Oct 2013. * Tweets were added up across all events in the NLCS Playoffs, ALCS Playoffs and World Series.
- 2013 World Series Hits a Home Run with Radio Listeners: Nielsen Audio, PPM Custom Sports Study

- Season-over-Season Viewership:
 - MLB Regular Season: Nielsen Galaxy Explorer, Apr – Oct 2012, Apr – Sep 2013, P2+ and Live+SD *Networks included: FOX, ESPN, ESPN2, TBS & MLBN
 - World Series: Nielsen Galaxy Explorer, Oct 2012, Oct 2013, P2+ and Live+SD *Networks included: FOX
- Demo Profile: Nielsen National TV Toolbox, Live+SD, Apr – Sep 2013 *Networks included: FOX, ESPN, ESPN2, MLBN & TBS
- Fan Insights: Scarborough USA+ Release 1, 2013, P18+
- Top Advertisers: Nielsen Monitor Plus, Q4 2012 – Q3 2013, National TV.
- Top 5 Local Fan Bases: Scarborough local Release 1, 2013, P18+

NHL

- Timeline:
 - TV Viewers: Nielsen Galaxy Explorer, June 1-24 2013 & Jan 1 2014, P2+ and Live+SD
 - Tweets: Nielsen SocialGuide, Jun 2013 – Jan 2014. * Tweets were added up across all events in the Western Conference Finals, Eastern Conference Finals and Stanley Cup Finals.
- Stanley Cup Finals By the Numbers: National TV Toolbox, Live+SD, June 2012 and June 2013, Household Demo, Networks included: NBC and NBC Sports Network and CNBC
- Season-over-Season TV Viewership:
 - NHL Regular Season: Nielsen Galaxy Explorer, Oct – Apr 2012, Jan – Apr 2013 P2+ and Live+SD. * Networks included: NBC & NBCSN
 - Stanley Cup Finals: Nielsen Galaxy Explorer, May - Jun 2012, June 2013 P2+ and Live+SD. * Networks included: NBC & NBCSN
- Demo Profile: Nielsen National TV Toolbox, Live+SD, Jan – April 2013 *Networks included: NBC and NBCSN.
- Fan Insights: Scarborough USA+ Release 1, 2013, P18+
- Top Advertisers: Nielsen Monitor Plus, Q4 2012 – Q3 2013, National TV
- Top 5 Local Fan Bases: Scarborough local Release 1, 2013, P18+

Motor Sports

- Timeline:
 - TV Viewers: Nielsen Galaxy Explorer, Feb – Oct 2013, P2+ and Live+SD
 - Tweets: Nielsen SocialGuide, Feb – Mar 2013.
- Top Advertisers: Nielsen Monitor Plus, Q4 2012 – Q3 2013, National TV *Excluding league association spend
- Season-over-Season TV Viewership:
 - NASCAR Sprint Cup Series: Nielsen Galaxy Explorer, Feb – Nov 2013, Feb – Nov 2012, P2+ and Live+SD. *Networks included: ABC, FOX, ESPN & TNT.
- Demo Profile: Nielsen National TV Toolbox, Live+SD, Feb – Nov 2013. *Networks included: ABC, ESPN, TNT, FOX, ESPN2.
- Fan Insights: Scarborough USA+ Release 1, 2013, P18+
- Top 5 Most Tweeted Drivers @ Daytona 500: Nielsen SocialGuide - Conversation, 2/24/2013, FOX.

Golf

- Timeline:
 - TV Viewers: Nielsen Galaxy Explorer, Apr-Oct 2013, P2+ and Live+SD
 - Tweets: Nielsen SocialGuide, Apr – Oct 2013
- Avid PGA Fans Skew Older, Richer & Tech Savvy: Nielsen FANTrender, P16+, Dec 2012 –Nov2013
- Demo Profile: Nielsen National TV Toolbox, Live+SD, Jan-Sep 2013 *Networks included: CBS, NBC.
- Fan Insights: Scarborough USA+ Release 1, 2013, P18+
- Top Advertisers: Nielsen Monitor Plus, Q4 2012 – Q3 2013, National TV. *Excluding league association spend
- Top 5 Most Tweeted Golfers @ Augusta: Nielsen SocialGuide – Conversation, 4/14/2013, CBS.

Soccer

- Timeline:
 - TV Viewers: Nielsen Galaxy Explorer, Jan – Dec 2013, P2+ and Live+SD
 - Tweets: Nielsen SocialGuide, Mar – Jul 2013
- MLS: Most Likely Smartphone User: Nielsen Mobile Insights survey, Q3 2013, P18+
- Season-over-Season TV Viewership:
 - MLS Playoffs (with cup): Nielsen Galaxy Explorer, Oct -Dec 2012, Oct -Dec 2013, P2+ and Live+SD *Networks included: ESPN, ESPN2, NBCSN, NBC & UMA
- Fan Insights: Scarborough USA+ Release 1, 2013, P18+
- Top Advertisers: Nielsen Monitor Plus, Q4 2012 – Q3 2013, National TV
- Demo Profile: National TV Toolbox, Mar-Oct 2013, Live+SD *Networks included: ESPN, ESPN2, NBC, NBCSN & UMA
- Top 5 Local Fan Bases: Scarborough local Release 1, 2013, P18+

NCAA Basketball:

- Timeline:
 - TV Viewers: Nielsen Galaxy Explorer, Mar – Apr 2013, P2+ and Live+SD
 - Tweets: Nielsen SocialGuide, March – April 2013. * Tweets were added up across all events in the Elite8 and Final4
- A Closer Look at the Conferences: Nielsen Galaxy Explorer, Nov 2012 – Mar 2013, P2+ and Live+SD. *Nationally broadcast games only - Regional games not included. *Networks included: ESPN2, ESPN & CBS
- Season-over-Season TV Viewership:
 - Regular Season: Nielsen Galaxy Explorer, Nov 2012 – Mar 2013, Nov 2011 – Mar 2012, P2+ and Live+SD. *Networks included: ESPN2, ESPN & CBS
 - NCAA Championship: Nielsen Galaxy Explorer, Apr 2013, Apr 2012, P2+ and Live+SD. *Networks included: CBS

- Demo Profile: Nielsen National TV Toolbox, March 2013 – April 2013, Networks: CBS, TRU, TBS, TNT
- Fan Insights: Nielsen @Plan, Release Q3 2013, P18+
- Top Advertisers: Nielsen Monitor Plus, Q4 2012 – Q3 2013, National TV. *Excluding league association spend
- Top 5 Local Fan Bases: Scarborough local Release 1, 2013, P18+

NCAA Football:

- Timeline:
 - TV Ratings: Nielsen Galaxy Explorer, Dec 2013 - Jan 2014, P2+ and Live+SD
 - Tweets: Nielsen SocialGuide, Jan 2014
- Conference Breakdown: Nielsen Galaxy Explorer, Aug– Dec 2013, P2+ and Live+SD *Nationally broadcast games only. Regional games not included. *Networks included: ABC, CBS, ESPN, FOX, NBC, ESPN2, ENN, NBCSN & ESPNU.
- Season-over-Season TV Viewership:
 - Regular Season: Nielsen Galaxy Explorer, Aug – Dec 2013, Sep – Dec 2012, P2+ and Live+SD. *Networks included: ABC, CBS, ESPN, FOX, NBC, ESPN2, ENN & NBCSN
 - BCS Championship: Nielsen Galaxy Explorer, Jan 2014, Jan 2013, P2+ and Live+SD. *Networks included: ESPN
- Demo Profile: Nielsen National TV Toolbox, December 2013 – January 2014, Networks: ABC, FOX, CBS, ESPN, ESPN2, ESPNU
- Fan Insights: Scarborough USA+ Release 1, 2013, P18+
- Top Advertisers: Nielsen Monitor Plus, Q4 2012 – Q3 2013, National TV
- Top 5 Local Fan Bases: Scarborough local Release 1, 2013, P18+

International:

Source: Yearly Sports Key Facts 2013/2013 - Eurodata TV Worldwide/Relevant Partners

Period: September 2012 - August 2013

Eurodata TV Worldwide / AGF - GfK
Fernsehforschung (Germany) / Auditel (Italy) /
BARB (UK) / CIM (Belgium) / Gallup
TV Meter (Denmark) / Ibope Media Information
(Argentina, Brazil) / Kantar Media (Spain) /
Mediamätning I Skandinavian AB (Sweden) /
Médiamétrie (France) / Nielsen Television Audience
Measurement (Indonesia, Korea, Malaysia) / TNS
Gallup (Norway, Russia) / SAARF (South Africa) /
Video Research Ltd (Japan)

For more information contact:

Yassine-Guillaume Berhoun

Sport Manager

MediaMetrie/Eurodata TV Worldwide

Email: ygberhoun@eurodatatv.com

Other Marquee Events:

- Timeline:
 - TV Ratings: Nielsen Galaxy Explorer, Jan – Sep 2013, P2+ and Live+SD
 - Social: Nielsen SocialGuide, May – Sep 2013

Miscellaneous:

Nielsen SocialGuide 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.

GET CLOSER TO THE FANS:

www.nielsenwire.com

FOR MORE INFORMATION CONTACT:

Stephen Master

Senior Vice President – Sports

Stephen.master@nielsen.com

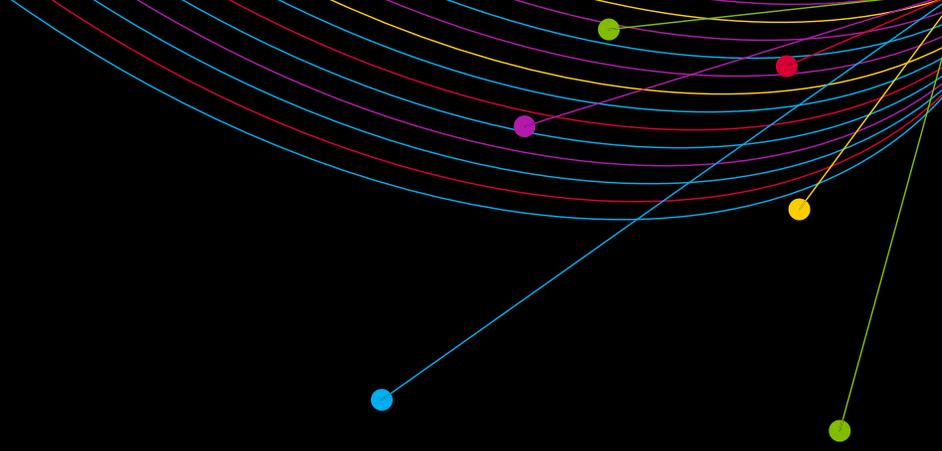
(646) 654-4577

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.

For more information, visit www.nielsen.com.

Copyright © 2014 The Nielsen Company. All rights reserved. Nielsen and the Nielsen logo are trademarks or registered trademarks of CZT/ACN Trademarks, L.L.C. Other product and service names are trademarks or registered trademarks of their respective companies. 14/7134



nielsen
.....

AN UNCOMMON SENSE
OF THE CONSUMER™