



NIELSEN SPORTS

YEAR IN SPORTS MEDIA REPORT

U.S. 2017



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**“WE ARE THE
MODERN
SPORTS FANS”**

INTRODUCTION

Welcome to Nielsen’s Year in Sports Media 2017 Report, a compilation of media highlights, sponsorship trends and consumer insights across leading sports properties.

As the sports and entertainment industry continues to evolve, so have our data and insights around sports consumers, enabling our clients to get a deeper understanding of the fan.

In 2017, we saw many familiar matchups and faces in the winner’s circle, including the Crimson Tide, the Tar Heels, the Warriors and the Penguins. However, fans were also introduced to some new faces and teams, including the amazing run of the Houston Astros to their first World Series Championship in franchise history, the Eagles’ thrilling Super Bowl win over the Patriots, 37-year-old Martin Truex Jr. hoisting his first Monster Energy NASCAR Cup trophy and Sergio Garcia finally breaking through at Augusta for his first golf major.

Our favorite teams and athletes provided many indelible memories for fans. Even with the proliferation of devices and unprecedented media fragmentation, sports content continued to thrive in 2017. Sports provided an ideal platform for brands to reach passionate consumers through compelling content.

Nielsen Sports produces this report each year with the mission to drive conversations. These conversations fulfill our intention to better know and serve you. We curated favorite moments for each sport across our experts because, at the end of the day, we are the modern sports fans. We encourage you, as you read, to similarly enjoy the amazing moments from the past year in sports.

Thank you very much for your contributions, and we hope you enjoy these highlights from across Nielsen’s wealth of consumer and media insights. The past year continued to prove that sports content across all media platforms continues to flourish and prosper.

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THE NFL FACED HEADWINDS IN 2017.

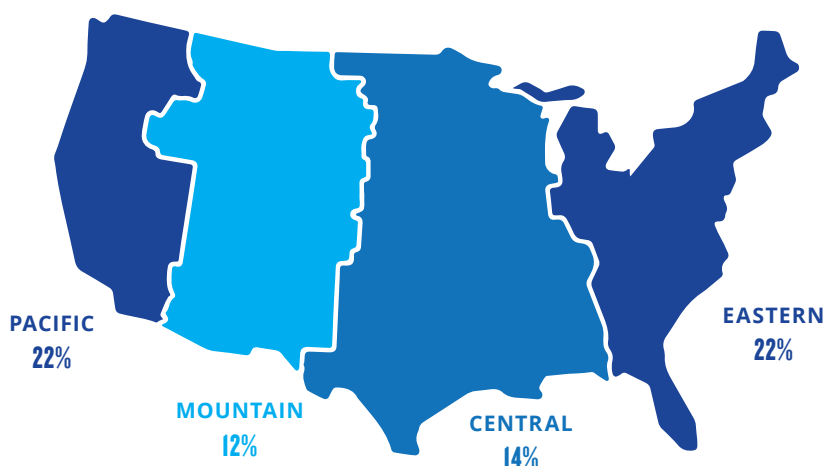
More than 103.4 million viewers watched the Philadelphia Eagles, led by back-up quarterback Nick Foles, defeat Tom Brady's New England Patriots in Super Bowl LII. Even with increased focus on the political landscape, social activism and, most importantly, changing media consumption habits, the league's programming dominated much of the top 100 televised programs in 2017, despite a 9% decline in average viewership during the regular season. New emphasis on out-of-home (OOH) viewership of the NFL shed light on the diversity of its fan base across demographics and locations.



THE NFL ENGAGED YOUNG, BICOASTAL FANS

NFL viewership from September through December of 2017 touted the greatest OOH lift among persons 18-24. This age group has not given up viewing; it simply views differently than its older counterparts. This group will seek to consume sports content wherever they may go, whether that is at the gym, in the office, at a bar/restaurant or at a friend's home.

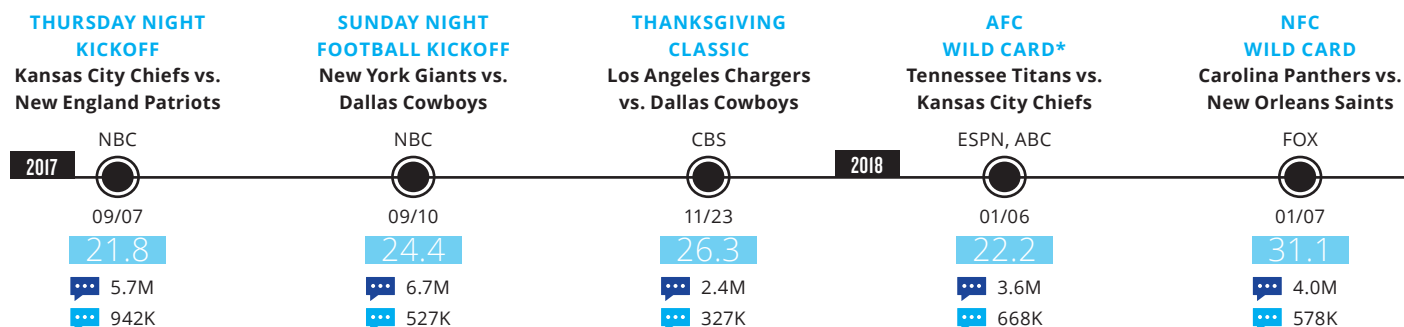
P18-24 NFL REGULAR SEASON VIEWERSHIP OOH LIFT BY TIME ZONE



TIMELINE OF TV VIEWERSHIP HIGHLIGHTS

AVG. # OF U.S. TV VIEWERS IN MILLIONS

Facebook TV Interactions
Twitter TV Interactions

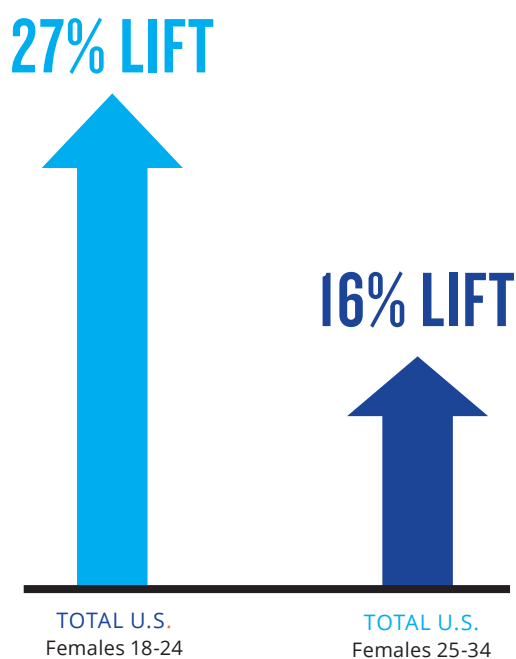


*AFC Wild Card simulcast on ESPN and ABC. Social interactions counted for the first network listed for AFC Wild Card.

THE NFL ENGAGED FEMALE FANS

The NFL has made a concerted effort to expand the number of women in key roles and to attract more female fans. Females 18-24 and 25-34 exhibited greater lifts from OOH viewership throughout the 2017 NFL season than their male counterparts across the U.S. As the NFL reaches younger, more diverse audiences through its progressive mentorship and leadership, OOH will help capture the unique ways these demos tune in to professional football.

FEMALE NFL VIEWERSHIP OOH LIFT BY AGE DEMO



FAN MEMORY

Despite being a New England native, perhaps the most exciting sports moment of the year was Super Bowl LII. The Eagles captured their first Super Bowl title in what turned out to be both an entertaining and record-breaking game. The high scores, backup quarterback storyline and combined offensive yards record were just a few of the many highlights that made for an unforgettable game.

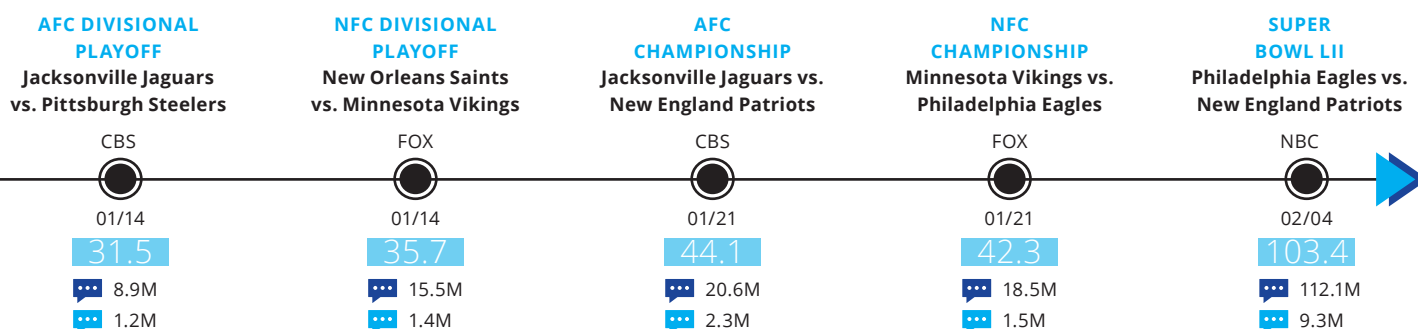
Elizabeth Duffy, Nielsen Social



THE MODERN FAN... DEFIES EXPECTATIONS

WHAT'S NEXT

Stakeholders who proactively accommodate shifts in media consumption will incentivize a wider scope of fans to engage with their favorite sports on a regular basis. Sports properties will be empowered to strengthen sponsorship sales stories by providing a more complete picture of where and how fans connect with sports content.



THE NBA BROKE THE SPONSORSHIP MOLD.

NBA fans certainly seem to like familiarity and can't seem to get enough of Curry's Warriors meeting LeBron's Cavaliers in the Finals as interest in the matchup keeps growing. Perhaps the addition of yet another superstar to the Warriors in Kevin Durant got even more fans engaged as Part Three of the trilogy had on average 1.1% more viewers than Part Two and 2.5% more than Part One, despite the fact that the series went only five games this year versus seven and six games in prior years. The Finals average audience this year was the highest since the Michael Jordan era. The league debuted a new sponsorship asset, the jersey patch, in 2017-18, with 19 of 30 teams using this asset for exposure at home and away games.

A SMALL ASSET MADE A BIG IMPACT

NBA jersey patches place sponsored assets within, rather than around, the action. Given the games' fast pace and the cameras' distant angles, abbreviated names, initials and icons perform best on jersey patches. Social media exposure on game day and during score updates further boost jersey patch performance as a sponsored asset. Nielsen Sports recently introduced a syndicated Social24 product tracking NBA sponsors' social exposure, engagement and derivative value.

JERSEY PATCH PERFORMANCE ON TV AND SOCIAL MEDIA



TOP 15 ASSET CAPTURED ON TV EXPOSURE

in terms of both Q1 Media Value and duration (time on screen of broadcast)



48% SOCIAL MEDIA VALUE COMES FROM FACEBOOK

followed by Instagram, which generates over 1/3 of value.

\$21,400 VALUE

average patch generates via TV during each home game



average duration of patch on TV screen per game



9-10X HIGHER

average value on Christmas Day

SOCIAL MEDIA SPONSORED POST



EXAMPLE ONLY

SOCIAL MEDIA LOGO EXPOSURE (ONLY)



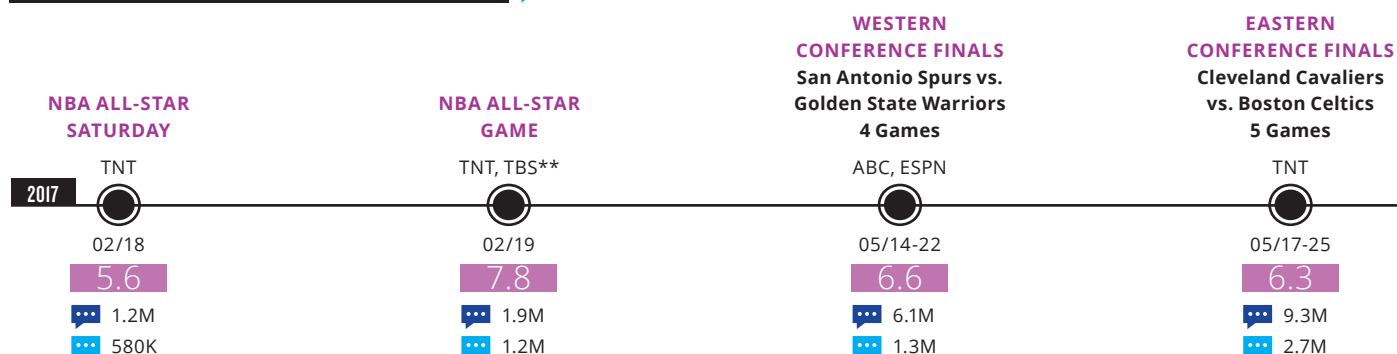
EXAMPLE ONLY

TIMELINE OF TV VIEWERSHIP HIGHLIGHTS*

AVG. # OF U.S. TV VIEWERS IN MILLIONS

FACEBOOK TV INTERACTIONS

TWITTER TV INTERACTIONS



*Twitter and Facebook interactions were totaled across all events in the Western Conference Finals, Eastern Conference Finals and NBA Finals.

**NBA All-Star Game simulcast on TNT and TBS. Social interactions counted for the first network listed for NBA All-Star Game.



FAN MEMORY

Isaiah Thomas of the Boston Celtics unexpectedly lost his sister in a car accident the day before his team began its 2017 playoff run. In game 2 of the Celtics' Eastern Conference Semifinals, which was on the day that would have been his sister's 23rd birthday, the 5'9" Thomas scored a career high of 53 points to lead the Celtics to an overtime victory and the Eastern Conference Finals.

Tyler Wasserman, Nielsen Sports

THE MODERN FAN... RECOGNIZES THE ROLE OF SPONSORSHIP

WHAT'S NEXT

As more progressive leagues embrace new sponsorship assets and revenue streams, other more traditionally minded leagues will assess the benefits and potentially follow suit. Teams will weigh the financial rationale for increased sponsorship against the need to preserve longstanding viewer experiences. The jersey patch suggests an evolving sponsorship landscape for the advantage of all stakeholders.

NBA FINALS
Cleveland Cavaliers vs.
Golden State Warriors
5 Games

ABC

06/01-12

20.5

59.9M

11.4M

NBA DRAFT

ESPN

06/22

3.4

2.5M

1.7M

NBA CHRISTMAS DAY
Houston Rockets vs.
Oklahoma City Thunder

ABC

12/25

5.0

208K

70K

NBA CHRISTMAS DAY
Cleveland Cavaliers vs.
Golden State Warriors

ABC

12/25

8.8

769K

294K

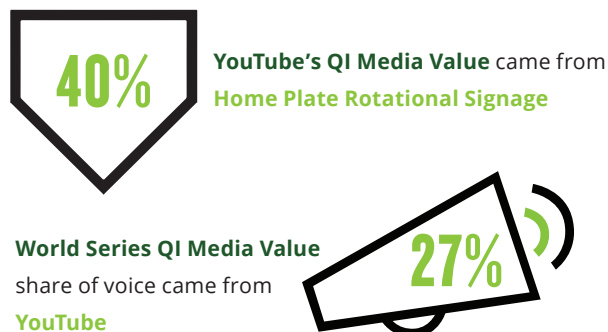
MLB MARRIED TECHNOLOGY WITH TRADITION.

After back-to-back thrilling seven-game World Series in 2016 and 2017, MLB has a lot of momentum and is well-positioned for the future, with an amazing collection of young stars in their mid 20s shining in the postseason spotlight. American League Rookie of the Year Aaron Judge has an N-Score Appeal Rating of 68 and is coming off a great postseason for the Yankees, and his Home Run Derby winning performance drew in the viewers as it was the most watched since 2009 and up 48% over 2016. Kris Bryant, 2016 National League MVP, led the Cubs to another deep postseason run in 2017 and has an N-Score Appeal Rating of 68, and Jose Altuve's social media following exploded to over one million Instagram followers after winning the 2017 American League MVP award and leading the Astros to the World Series championship. To reach fans "everywhere," YouTube became the first presenting sponsor of the World Series. The partnership made the games available live online to YouTube subscribers.

YOUTUBE HIT A HOME RUN WITH WORLD SERIES SPONSORSHIP

Reaching fans in 2017 meant connecting beyond serving an ad. YouTube's ubiquitous "play" button poster in the World Series did both. Camera angles positioned the sponsored item in the center of the frame and made people second-guess where they were watching. This sensation received greater attention than any of the YouTube commercials leading into live play. The share of Q1 Media Value* belonging to each playoff round's title sponsor (like YouTube's sponsorship of the World Series) increased each round.

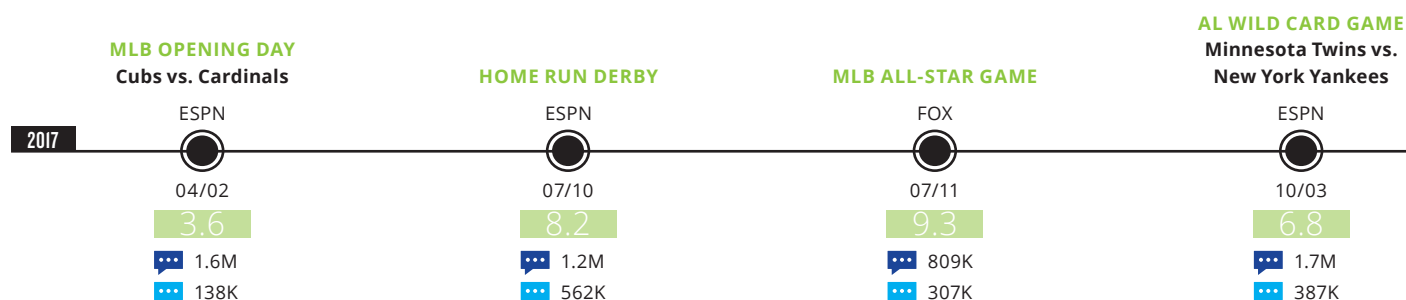
YOUTUBE WORLD SERIES SPONSORSHIP IN NUMBERS:



TIMELINE OF TV VIEWERSHIP HIGHLIGHTS

AVG. # OF U.S. TV VIEWERS IN MILLIONS

FACEBOOK TV INTERACTIONS
TWITTER TV INTERACTIONS



*See footnote on page 30.

LIVE ACTIVATION COMPLEMENTED NETFLIX BINGE VIEWING

MLB not only reached fans everywhere in 2017, it also connected their digital viewing activities. Subscription Video On Demand (SVOD) Content Ratings, now available for Netflix via audio signature, is a measurement solution for one new type of viewership. The following example of "Stranger Things 2" virtual branding throughout the League Championship Series complemented lift for the Netflix original, and further proved live tune-in and binge viewing can coexist.

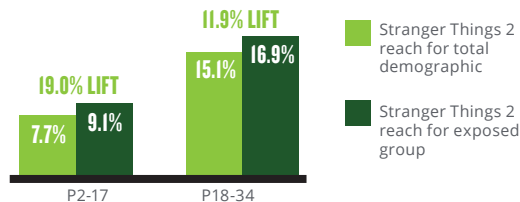
STRANGER THINGS 2 REACH - LIFT FROM MLB PLAYOFFS

The reach of Stranger Things 2 was lifted among those exposed to its MLB Playoff branding.

STRANGER THINGS 2
virtual branding appeared

24X

throughout the League Championship Series.



VIRTUAL BRANDING SPONSORSHIP ONLY VISIBLE TO THE TELEVISION AUDIENCE:

Another area where MLB was able to get additional exposure for its sponsors was the use of virtual branding.

ALCS & NLCS:

Virtual branding was on screen for a total of:

8

**MINUTES
41 SECONDS**

46% of this duration was Camping World

WORLD SERIES:

Virtual branding was on screen for a total of

5

**MINUTES
50 SECONDS**

53% of this duration was YouTube

FAN MEMORY

My favorite moment of the MLB season was watching 5'6" Jose Altuve lead the Houston Astros to their first World Series championship just months after the city was ravaged by Hurricane Harvey. #HoustonStrong

Will Cavanaugh, Nielsen Sports



THE MODERN FAN... STAYS CONNECTED THROUGH TECHNOLOGY

WHAT'S NEXT

Title sponsorships for each round of the playoffs, the utilization of virtual branding, and partnerships with YouTube and the Netflix hit "Stranger Things" demonstrated the evolving sponsorship MLB landscape. Expect other major leagues to follow suit by exploring new assets and opportunities. Rather than exist as disparate parts of the media landscape, leagues will benefit from understanding how to coexist with other content trending among their fans.

NL WILD CARD GAME
Colorado Rockies vs.
Arizona Diamondbacks

TBS

10/04

4.4

675K

151K

ALCS PLAYOFFS
New York Yankees vs.
Houston Astros
7 Games

FOX, FS1

10/13-21

6.5

18.2M

1.9M

NLCS PLAYOFFS
Los Angeles Dodgers
vs. Chicago Cubs
5 Games

TBS

10/14-19

6.2

12.5M

1.4M

WORLD SERIES
Houston Astros vs.
Los Angeles Dodgers

FOX

10/24-11/01

18.9

52.5M**

5.1M**

Twitter and Facebook interactions were totaled across all events in the ALCS Playoffs, NLCS Playoffs and World Series.

**10/27/2017 World Series Outage: Interactions from the 10/27/17 game not included

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COUNTRY MUSIC TOOK CENTER STAGE FOR THE NHL.

Playoff hockey had viewers hooked despite regular NHL viewership being down compared to the previous season. The 2017 Stanley Cup games attracted 19% more viewers on average than in 2016. Nashville's first time hosting the Stanley Cup Finals overlapped with the annual CMA Festival. The Predators capitalized on this opportunity with a major country music star leading the national anthem for every home playoff game. This not only celebrated the unique culture of Nashville, but perhaps introduced more country music fans to the NHL.



MUSIC CITY LIVES UP TO ITS NAME

With the hockey world turning its attention to Nashville, the Predators leveraged their country roots and called in some of the genre's biggest stars, including Carrie Underwood and Faith Hill, to celebrate. Four of the top 10 and nine of the top 20 most marketable country artists by N-Score sang the national anthem before Predators playoff games. The Predators' promotion of its proud city coincided with not only CMA Fest, but an increase in country consumption both locally and nationwide. On-Demand Audio Streams for the country genre during the Stanley Cup saw a 15% lift nationally compared to the pre-playoffs window. Locally, Nashville honky-tonked its way to a 42% bump in On-Demand Audio Streams for country music during the Stanley Cup Finals.

NHL COUNTRY MUSIC PERFORMER N-SCORE RANKINGS BY MARKETABILITY



TIMELINE OF TV VIEWERSHIP HIGHLIGHTS*

AVG. # OF U.S. TV VIEWERS IN MILLIONS

Facebook TV Interactions
Twitter TV Interactions

CENTENNIAL CLASSIC
Detroit Red Wings vs.
Toronto Maple Leafs

NBC

2017

01/01

1.1

87K

25K

2017 WINTER CLASSIC
Chicago Blackhawks
vs. St. Louis Blues

NBC

01/02

2.6

672K

82K

NHL ALL-STAR GAME

NBC

01/29

2.3

202K

100K

STADIUM SERIES
Philadelphia Flyers
vs. Pittsburgh
Penguins

NBC

02/25

1.9

536K

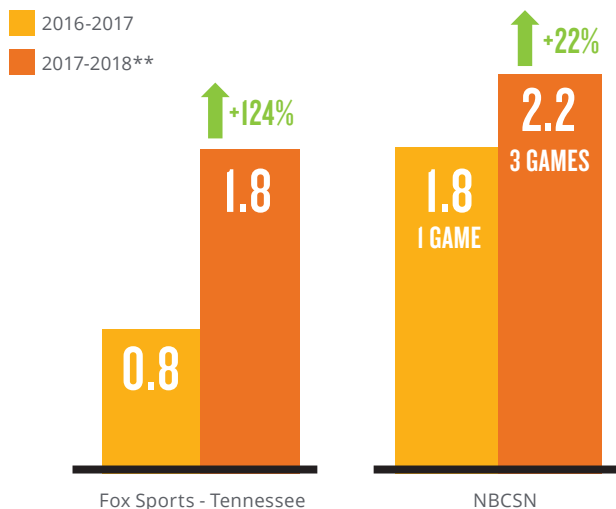
69K

*Twitter and Facebook interactions were totaled across all events in the Western Conference Finals, Eastern Conference Finals and Stanley Cup Final.

HOCKEY FEVER IS SPREADING IN NASHVILLE

The new fans the NHL sought out via country music during the Stanley Cup accompanied significant upticks in Nashville Predators viewership both locally and nationally in 2017. Last season's playoff run led to three nationally televised games on NBCSN through early December versus one the season prior, and drove a specific uptick in viewership among "Smashville" fans. The Predators' current season Fox Sports Tennessee rating is higher than its rating for last season's NBCSN matchup.

NASHVILLE DMA HOUSEHOLD RATING FOR PREDATORS GAMES



FAN MEMORY

The Nashville Predators' run to the Stanley Cup Final was my favorite story of the 2016-17 NHL season. Nashville began the playoffs as the lowest-seeded team, then proceeded to sweep the top-seeded Chicago Blackhawks. From flying catfish to country music stars, 'Smashville' embraced its Predators as few cities have done in recent memory.

Zach Lewis, Nielsen Sports



THE MODERN FAN... TUNES IN FOR MANY REASONS

WHAT'S NEXT

Sports will not exist in a bubble in 2018. As fans allocate their limited free time, sports properties will best engage fans with a diverse mix of personal passions. Such decisions will provide reciprocal, spillover benefits to outside industries touched by sports and present opportunities for future collaboration around new audiences.

WESTERN CONFERENCE FINALS

Nashville Predators vs. Anaheim Ducks
6 Games

NBC, NBCSN

05/12-22

1.4

1.7M
366K

EASTERN CONFERENCE FINALS

Ottawa Senators vs. Pittsburgh Penguins
7 Games

NBC, NBCSN

05/13-25

2.1

3.4M
554K

STANLEY CUP FINALS

Nashville Predators vs. Pittsburgh Penguins
6 Games

NBC, NBCSN

05/29-06/11

4.7

10.7M
1.6M

2018 WINTER CLASSIC

New York Rangers vs. Buffalo Sabres

NBC

01/01

2.5

441K
59K

**Games played through 12/08/17

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ROUGH YEAR FOR U.S. SOCCER BUT MLS IS STILL PRIMED FOR GROWTH.

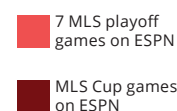
Over 1.4 million unique viewers watched in disbelief as the U.S. Men's National team was eliminated from the 2018 World Cup at the hands of the not-so-mighty soccer power, Trinidad and Tobago. The disappointment around the USMNT, however, did not slow down the amazing momentum and growth of the MLS, with the addition of Atlanta FC and Minnesota United FC as the 21st and 22nd teams. Atlanta FC became one of the biggest success stories of the year, not just in soccer but across all U.S. Sports, playing in front of packed stadiums and drawing impressive local TV audiences as the city embraced its new team. Atlanta FC had an average Regional Sports Network viewership of close to 40,000 in its first season, and for perspective, the Braves, who have called Atlanta home for over 50 years, had an average viewership of 60,000.

MLS EXPANSION TAPPED GROWING U.S. CITIES

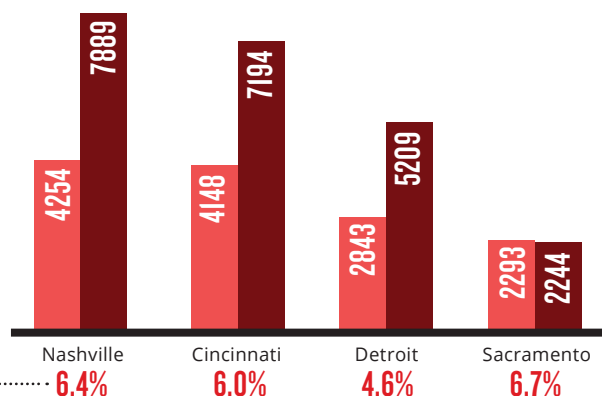
Cincinnati, Detroit and Sacramento-Modesto remain in the running for future MLS expansions following Nashville. For the seven MLS playoff games on ESPN, Nashville had the highest viewership among the four markets, with Cincinnati a close second. Despite Detroit and Sacramento's larger populations, Cincinnati and Nashville sustained much larger average audiences. Still, Sacramento sported the highest soccer participation rate.

MLS VIEWERSHIP AND PARTICIPATION IN CONTENDER CITIES

HH Average Audience for:



% of general population participation in soccer as a leisure activity



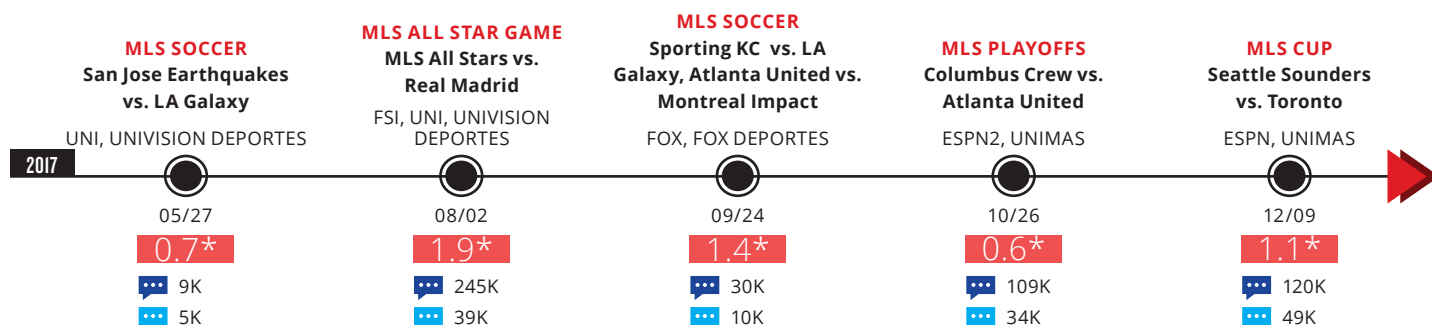
WHAT'S NEXT

MLS will continue growing local participation in 2018. MLS expansion will grow the national footprint of professional soccer, help attract top players earlier in their careers and grow the soccer audience throughout the U.S.

TIMELINE OF TV VIEWERSHIP HIGHLIGHTS**

AVG. # OF U.S. TV VIEWERS IN MILLIONS

Facebook TV Interactions
Twitter TV Interactions



*Viewership reflects aggregate of English and Spanish language multicasts.

**Social interactions counted for the first network listed for each event

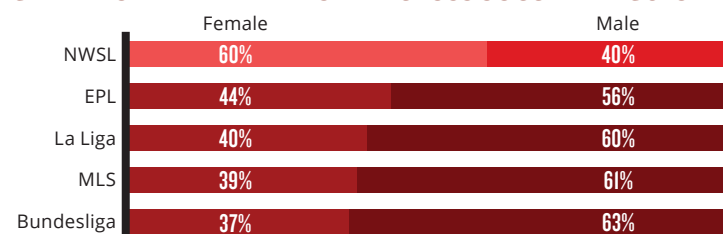
SOCCER



AN NWSL PARTNERSHIP EMPOWERED NEW AUDIENCES

The National Women's Soccer League's first year on Lifetime saw a +2% lift in average audience for all viewers compared to 2016's last season on FS1, +32% among female viewers. The move to Lifetime appeared to engage the female fan base, as NWSL's 60% female viewer composition for 2017 was the highest of nationally televised soccer league. **With a median age of 48**, NWSL is one of the lowest median ages of TV viewers among U.S. sports leagues.

GENDER SPLIT BY VIEWERSHIP ACROSS SOCCER LEAGUES



LIGA MX

Chivas's win in Liga MX's 2017 Clausura final was the most watched Clausura final since 2013, representing an 8% bump in average audience compared to 2016, and 160% compared to 2014. The win capped off a strong performance for the Clausura season, and also highlighted Liga MX's status as young U.S. viewers' soccer league to watch. 2017 Clausura's millennial (18-34) average audience of 265K for broadcast games was 57.7% higher than that of the EPL.

MILLENNIAL (P18-34) AA PROJECTION



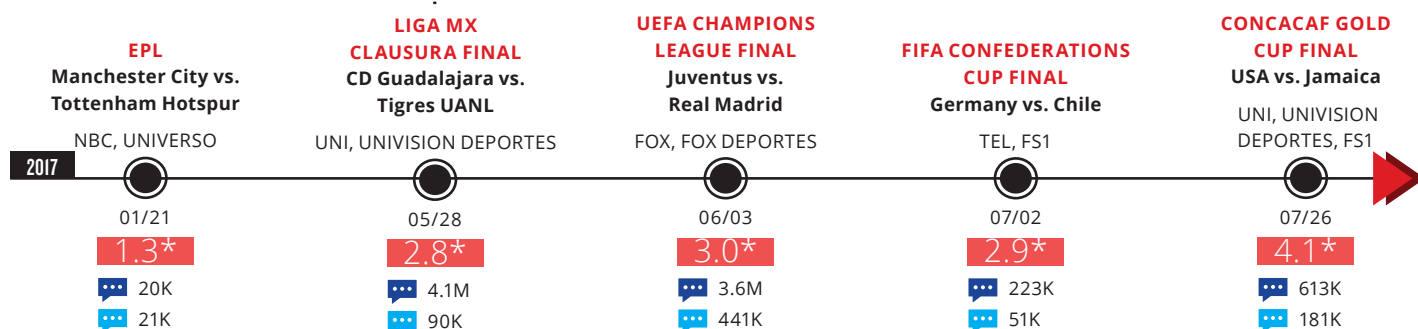
FAN MEMORY

Like most fans that night, I was shocked into disbelief that we weren't actually going. It was devastating to come to terms with the fact that the United States would watch the World Cup from the sidelines in 2018. To be so agonizingly close to qualifying and then fall short is more hurt than most fans can really put into words.

Anelise Cimino, Nielsen Sports



THE MODERN FAN... GROWS WITH THE SPORT



*Viewership reflects aggregate of English and Spanish language multicasts.

**Social interactions counted for the first network listed for each event

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GOLF

GOLF'S YOUTH MOVEMENT IS IN FULL SWING.

Although Sergio Garcia (N-Score 64) finally broke through at Augusta to claim his first major, he and some of the other most well-known and successful golfers from his era, including Phil Mickelson (N-Score 70), Justin Rose (N-Score 61) and, of course, Tiger Woods (N-Score 65), have all slowly begun to “pass the driver” to the next generation of superstars. The new crop of young talented golfers, all of whom are under 30, including Jordan Spieth (N-Score 69) and Rickie Fowler (N-Score 65), are effectively using social media to build their respective fan bases and resonate with younger fans. All of this is great news for the sport of golf.

YOUNG GUNS FUELED PGA TALENT ALONGSIDE THE TRIED AND TRUE

The saturation of top ranks in golf among young players generated continued attention around the sport. Spieth also won The Travelers Championship on a bunker shot deemed the “shot of the year,” which went viral on social media. In addition, just over 42% of all Facebook posts about the final round of the tournament were authored by people ages 18-34.



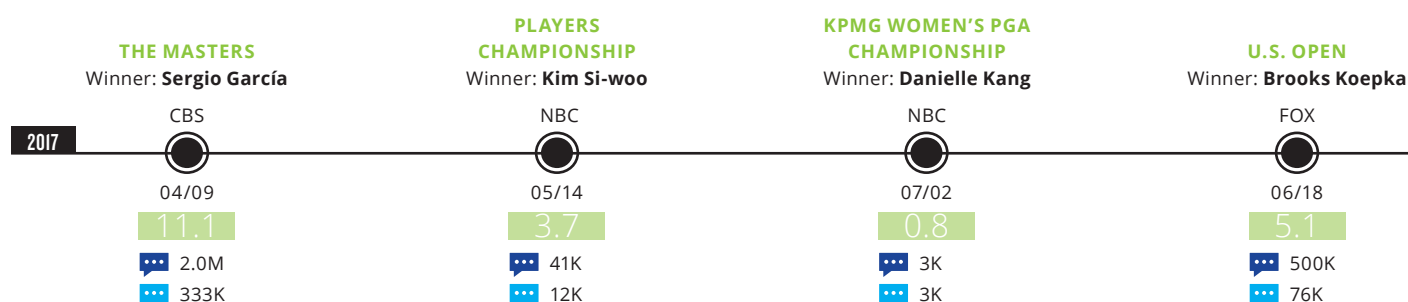
TOP 10 GOLFERS BY Q1 MEDIA VALUE (AGE)

- 1 RICKIE FOWLER (29)
- 2 JORDAN SPIETH (24)
- 3 SERGIO GARCIA (38)
- 4 DUSTIN JOHNSON (33)
- 5 JUSTIN ROSE (37)
- 6 JUSTIN THOMAS (24)
- 7 HIDEKI MATSUYAMA (25)
- 8 JASON DAY (30)
- 9 JON RAHM (23)
- 10 CHARLEY HOFFMAN (41)

TIMELINE OF TV VIEWERSHIP HIGHLIGHTS*

AVG. # OF U.S. TV VIEWERS IN MILLIONS

Facebook TV Interactions
Twitter TV Interactions

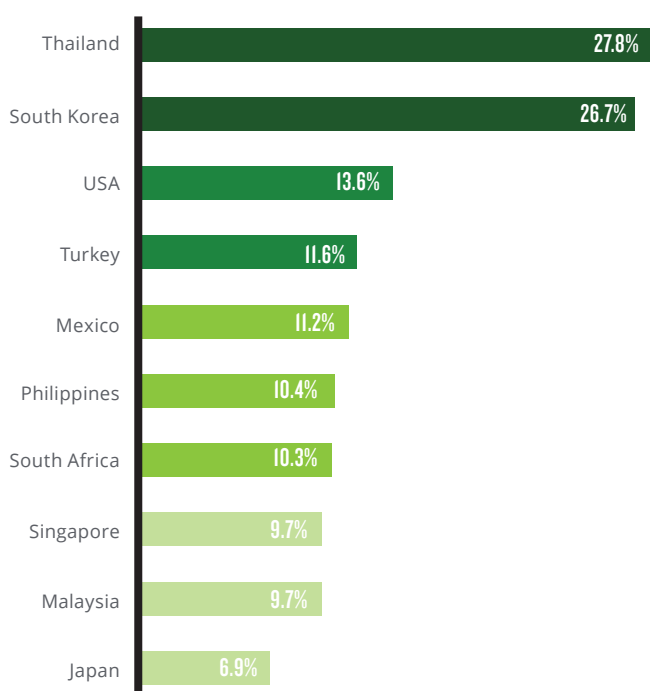


*Only the final day of each tournament is listed.

FOR THE LPGA, GLOBAL OPPORTUNITIES FOLLOWED THE LEADERBOARD

Though golf originated in Scotland, the LPGA's popularity is spreading globally as a result of its diverse talent. Its roster of sponsors and hosts has followed suit. Seven of the top 10 golfers based on 2017 LPGA winnings were from the top three countries by LPGA fandom. Six out of the top 10 countries by avidity hosted one of the LPGA's 34 tournaments in the most recent season. All but Thailand also showcased a company headquartered in their country as the sponsor of an LPGA event.

TOP 10 COUNTRIES BY INTEREST IN LPGA:



FAN MEMORY

Within minutes of arriving at the 2017 President's Cup hosted in New York, I was standing next to some of golf's greats, such as Freddy Couples and Ernie Els. Seeing the players I grew up watching on TV along side the next generation of all-stars like Jordan Spieth and Justin Thomas was a once-in-a-lifetime experience! In my opinion, the best golf is yet to come.

Mary Beckerman, Nielsen Finance



THE MODERN FAN... CONSTANTLY EVOLVES

WHAT'S NEXT

Golf stakeholders will continue to receive long-term benefits from the sport's mix of budding and established stars. Similar to fans, players can pass their passion on to the next generation, as evidenced on the TOUR today. Athletes today, both rookies and veterans, are building relationships that help each other not only grow their games, but also their personal brands and fan appeal.

OPEN CHAMPIONSHIP

Winner: **Jordan Spieth**

NBC

07/23

4.9

227K
166K

PGA CHAMPIONSHIP

Winner: **Justin Thomas**

CBS

08/13

4.9

175K
72K

TOUR CHAMPIONSHIP

Winner: **Xander Schauffele**

NBC

09/24

1.4

33K
13K

PRESIDENTS CUP

Winner: **USA Team**

NBC

10/01

2.3

82K
43K

UFC/BOXING

UFC REASSESSED ITS SPONSORSHIPS FOR FIT AND OPPORTUNITY.

The year 2017 was headlined by the Mayweather vs. McGregor boxing match, which drew 4.3 million domestic PPV buys, the second-highest number of all time. With an additional 35+ events in 2017, UFC gained significant momentum heading into its 25th anniversary in 2018.

UFC FANS ARE MORE DIVERSE AND SKEW YOUNGER THAN "BIG FOUR"

The new UFC-Modelo sponsorship shed light on a key distinction of UFC over other established U.S. leagues – its young, diverse fan base. The higher percentages of younger and Hispanic fans for UFC than "Big Four" means unique engagement opportunities for relevant brands.

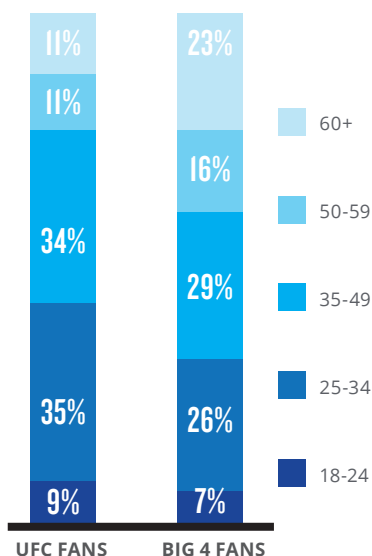
TV VIEWERSHIP BY ETHNICITY & AGE IN 2017

UFC FANS 16% HISPANIC

Compared to:

BIG 4 FANS 12% HISPANIC

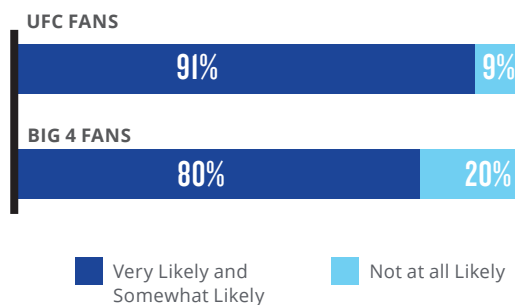
NFL, NBA, MLB, NHL



UFC FAN SPONSOR LOYALTY

UFC fans are also highly active in sponsor engagement compared to fans of "Big Four" leagues. UFC fans are more loyal to a company that sponsors a sport or event they follow, and they are also more likely to consider a sponsor's product or service. Modelo, the beer with the "fighting spirit," is especially poised for success in this sponsorship because of its natural fit.

When a company sponsors an event or sport that you follow, how likely would you be to consider that company's brand, product(s) or service(s) for the first time?



TIMELINE OF TV VIEWERSHIP HIGHLIGHTS

AVG. # OF U.S. TV VIEWERS IN MILLIONS

Facebook TV Interactions
Twitter TV Interactions

UFC FIGHT NIGHT

UFC Women's Bantamweight

Shevchenko vs. Pena

FOX

01/28

2.2

183K

49K

PREMIER BOXING CHAMPIONS

Heavyweight Title Fight

Wilder vs. Washington

FOX

02/25

1.9

126K

19K

SHOWTIME BOXING

Welterweight Title Fight

Thurman vs. Garcia

CBS

03/04

3.1

376K

53K

TOP RANK BOXING

Welterweight Title Fight

Pacquiao vs. Horn

ESPN

07/01

2.8

796K

289K



FAN MEMORY

My favorite moment of the year in this space was the spectacle of Mayweather vs. McGregor. The event evolved from a boxing match to more of a spectacle. The ability of these two fighters to attract mainstream fans proved that the boxing/MMA world has major crossover appeal.

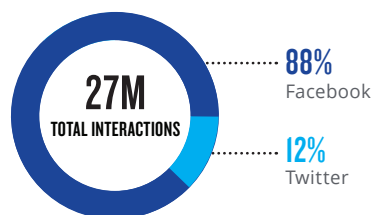
Joe Casey, Nielsen Sports

MAYWEATHER MCGREGOR FIGHT LIT UP SOCIAL MEDIA

The highly publicized fight between UFC star Conor McGregor and pro boxer Floyd Mayweather generated the most social media conversation tied to a televised event on the evening it aired with more than 27 million total interactions on Facebook and Twitter.

MAYWEATHER - MCGREGOR SOCIAL CONVERSATION

#1 MOST SOCIAL PROGRAM ON 08/26/17



TOP HASHTAGS

#mayweathervmcgregor
#mayweathermcgregor
#mayweather
#mcgregor

THE MODERN FAN... CRAVES AUTHENTICITY

WHAT'S NEXT

The "fit" of fans to brands significantly impacts sponsorship engagement. Understanding the fit across sports properties and markets in 2018 will allow leagues to learn from each other, cultivating an atmosphere across the board that celebrates sponsor loyalty and integration.

UFC FIGHT NIGHT
UFC Men's
Middleweight
Weidman vs. Gastelum

FOX

07/22

2.0

119K
47K

MAYWEATHER VS. MCGREGOR

FOX*, HDPPV**

08/26

2.4*

23.8M
3.2M

TOP RANK BOXING
Super Featherweight
Title Fight
Lomachenko vs. Rigondeaux

ESPN

12/09

1.7

142K
32K

UFC FIGHT NIGHT
UFC Men's
Welterweight
Lawler vs. dos Anjos

FOX

12/16

2.1

64K
31K

*Viewers are given for prelims.

**Numbers reflect social interactions from HDPPV.

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COLLEGE COMPETITION BROUGHT FANS TOGETHER.

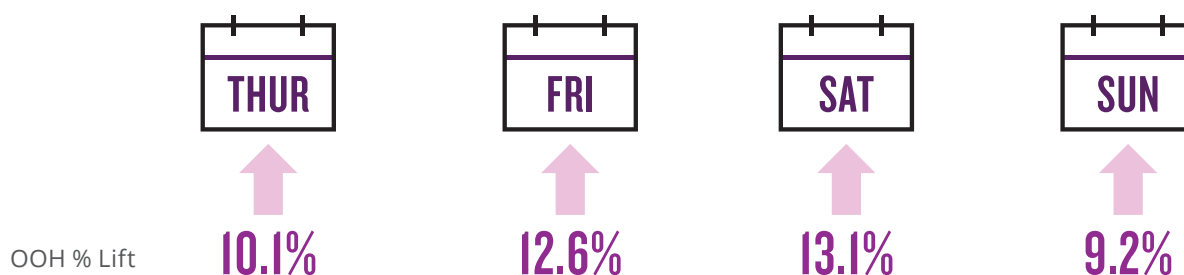
Fans enjoyed a very exciting College Football season in 2017 – capped off with two out of three College Football Playoff games going into overtime on ESPN. Highly competitive games as well as shifting semi-final games back to the traditional January 1 slot (after two years on December 31) contributed to big boosts in viewership. For the three-game playoff, ESPN enjoyed a 21% jump in ratings over 2016 and a 28% jump versus 2015.

The NCAA Basketball Tournament also lived up to its March Madness moniker with its share of buzzer beaters. With both semi-final games going down the wire, viewership was up 37% versus 2016.

MARCH MADNESS PROVED A SLAM DUNK FOR OUT-OF-HOME VIEWERSHIP

In 2017, NCAA Basketball got a boost from the Final Four return to network television. NCAA Basketball Tournament viewership exceeded 2016 by 27% across the four networks airing tournament games. On average, 4.6 million people tuned in at home. When adding in out-of-home viewers, viewership increased by almost 11%. Out-of-home viewership contribution was highest during Friday and Saturday games.

HIGHEST LIFT FROM OOH BY DAY OF THE WEEK



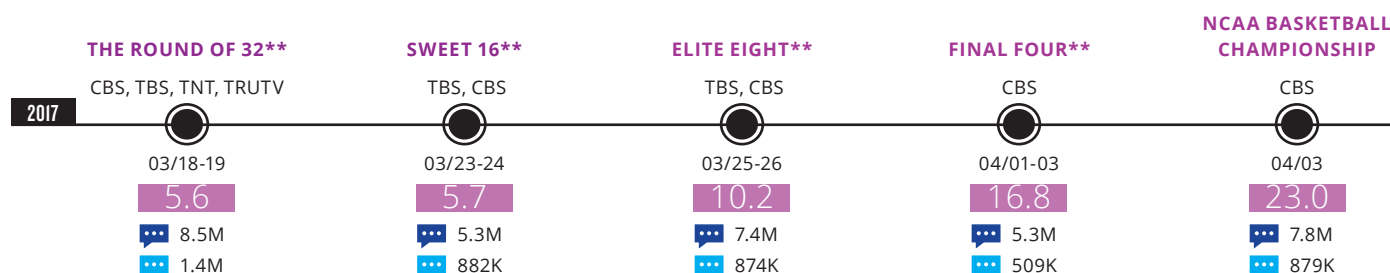
MARCH MADNESS AT BUFFALO WILD WINGS

Buffalo Wild Wings had a significant media buy throughout March Madness to promote its own in-restaurant viewing experience. 3.6 million people who watched the college basketball tournament on TV reported also eating Buffalo Wild Wings in the 30 days prior. Additionally, people who watch college basketball on TV are 56% more likely to eat at Buffalo Wild Wings than the general U.S. population.

TIMELINE OF TV VIEWERSHIP HIGHLIGHTS*

AVG. # OF U.S. TV VIEWERS IN MILLIONS

FACEBOOK TV INTERACTIONS
TWITTER TV INTERACTIONS



*Timeline of TV viewership highlights excludes OOH.

**Social interactions reflect the game with the highest interactions for Round of 32, Sweet 16, Elite Eight and Final Four.



COLLEGE FOOTBALL FANS SHOW SPONSOR LOYALTY

NCAA bowl season provides a platform for fans, players, students and alumni to celebrate their school's football season one last time. College football fans tend to be loyal to the brands that support their favorite sport and teams, as demonstrated by their intent to purchase sponsor products.

COMPARED TO THE U.S. POPULATION, PEOPLE WHO WATCHED A BOWL GAME ARE:

57% 

more likely to
drink
Dos Equis

29% 

more likely to
eat at Outback
Steakhouse

24% 

more likely to
drink Dr Pepper
or Diet Dr Pepper

50% 

more likely to
invest in
mutual funds

16% 

more likely to use
AT&T wireless/
cable provider

FAN MEMORY

After Georgia jumped out to a 13-0 lead over Alabama, 19-year-old freshman and half-time replacement quarterback Tua Tagovailoa threw a perfect 41-yard touchdown pass in overtime to send the Crimson Tide back to the podium in comeback fashion. This year's game proved college football consistently provides unpredictable excitement, keeping us awake hours past our bedtime.

Ben Bokor, Nielsen Sports



THE MODERN FAN... FUELS A COMMUNITY ECOSYSTEM

WHAT'S NEXT

The ability for college sports to tap into the deep passion and personal connection that alumni have with their alma mater creates unique opportunities for schools, conferences and the NCAA. Developing media partnerships across many different channels that allow avid fans to engage with "their school" and foster the unique sense of community around college sports is critical to building the next generation of college fans.

FIESTA BOWL
Penn State
vs. Washington

ESPN

12/30

10.2

698K

101K

ORANGE BOWL
Wisconsin
vs. Miami

ESPN

12/30

11.8

956K

158K

2018

ROSE BOWL**
Georgia
vs. Oklahoma

ESPN, ESPN2

01/01

27.1

5.8M

880K

SUGAR BOWL**
Alabama
vs. Clemson

ESPN, ESPN2

01/01

21.6

4.0M

408K

CFP NATIONAL CHAMPIONSHIP**
Alabama
vs. Georgia

ESPN, ESPN2, ESPNU

01/08

28.8

14.3M

1.8M

**Rose Bowl and Sugar Bowl simulcast on ESPN and ESPN2. CFP National Championship simulcast on ESPN, ESPN2 and ESPNU. Social interactions counted for the first network listed for these events.

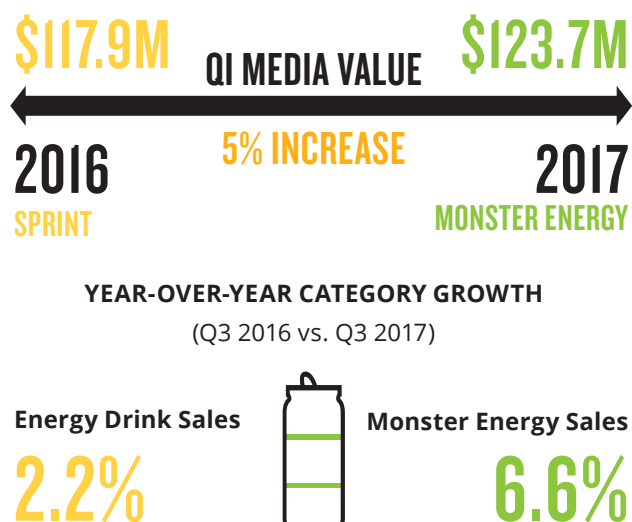
NASCAR

NASCAR RECEIVED A REFRESH.

The 2017 NASCAR season was one of transition as the new stage racing format was introduced and the sport debuted Monster Energy as the new entitlement partner for its top-flight series. The beloved Dale Earnhardt Jr., with an N-Score of 73, and high-profile Danica Patrick, with an N-Score of 75, both ran the final laps of their NASCAR careers. The new stage format and Monster Energy partnership created many opportunities for the circuit to innovate, using social media to raise the profile of their up and coming “young guns.” While Dale and Danica were fan favorites, NASCAR’s roster of young gun drivers (including Kyle Larson, Chase Elliott and Ryan Blaney) are anxious to fill that role. They may not currently have the awareness levels of the more established drivers, but their N-Scores indicate that they have high appeal and are well-liked by fans.

MONSTER ENERGY MADE A MONSTER SPLASH IN NASCAR

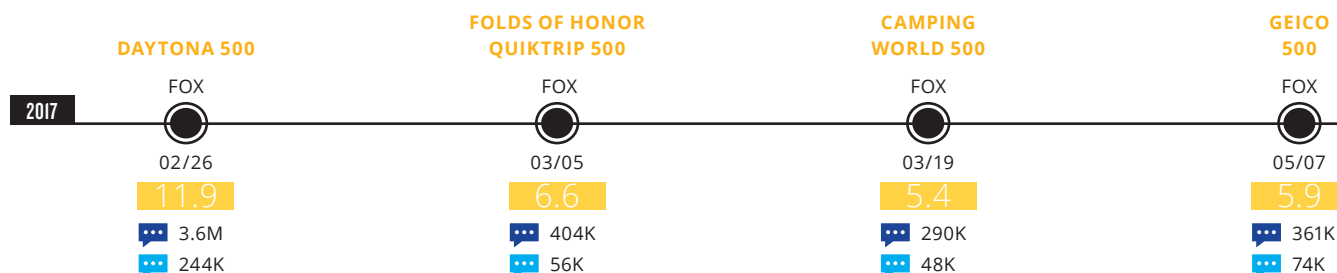
NASCAR’s three-part stage racing, meant to sustain the excitement of both viewers and drivers, contributed to increased in-broadcast visibility for Monster over its predecessor, Sprint. In addition to in-broadcast visibility, Monster Energy benefited from further sponsorship activation at the local-market level for race markets. In the third quarter of 2017, Monster’s increase in sales of 6.6% outpaced the energy drink category growth of 2.2%.



TIMELINE OF TV VIEWERSHIP HIGHLIGHTS

AVG. # OF U.S. TV VIEWERS IN MILLIONS

FACEBOOK TV INTERACTIONS
TWITTER TV INTERACTIONS



STAGE RACING OFFERS OPPORTUNITY FOR SOCIAL ENGAGEMENT

Stage breaks during NASCAR races offered a new opportunity to engage fans socially in 2017 without interrupting NASCAR green flag action. In support of this notion, spikes in social media activity around NASCAR races coincided with stage breaks. The stage breaks, which are longer than traditional commercial pods, contributed to further engagement with NASCAR properties. Monster Energy specifically benefited from fans' social interactions with NASCAR, generating an additional \$7.5 million in Q1 Media Value through NASCAR content tracked by Social 24 (this is in addition to the \$123.7 million in Q1 Media Value from TV exposure).

Compared to 10 minutes preceding the segment breaks,

NASCAR-related activity increases an average of:

+38.9%

on Twitter

+5.9%

on Facebook

during the segment breaks

FAN MEMORY

Dale Earnhardt Jr.'s retirement send-off from NASCAR was my favorite part of the 2017 NASCAR season. As one of the most loved drivers and personalities in the sport for so long, Dale was truly thanked and praised by fans, other drivers and almost everyone involved in NASCAR for the last 20+ years, which truly exemplified the spirit of the sport.

Collin Thurston, Nielsen Sports



THE MODERN FAN... SEEKS SOCIAL CONNECTION

WHAT'S NEXT

Prospective sponsors in 2018 will consider not only their objectives against the demographics of the fan base, but also the incentives for fans to tune in, view ancillary programming and engage on social media. Look for rights holders to increasingly leverage commercial and game/stage breaks as opportunities to connect more intimately with current and prospective fans.

COCA-COLA

600

FOX



05/28

4.6

346K
80K

COKE ZERO

400

NBC



07/01

5.4

333K
88K

BRANTLEY GILBERT BIG
MACHINE BRICKYARD 400

NBC



07/23

5.6

282K
94K

FORD ECOBOOST

400

NBC



11/19

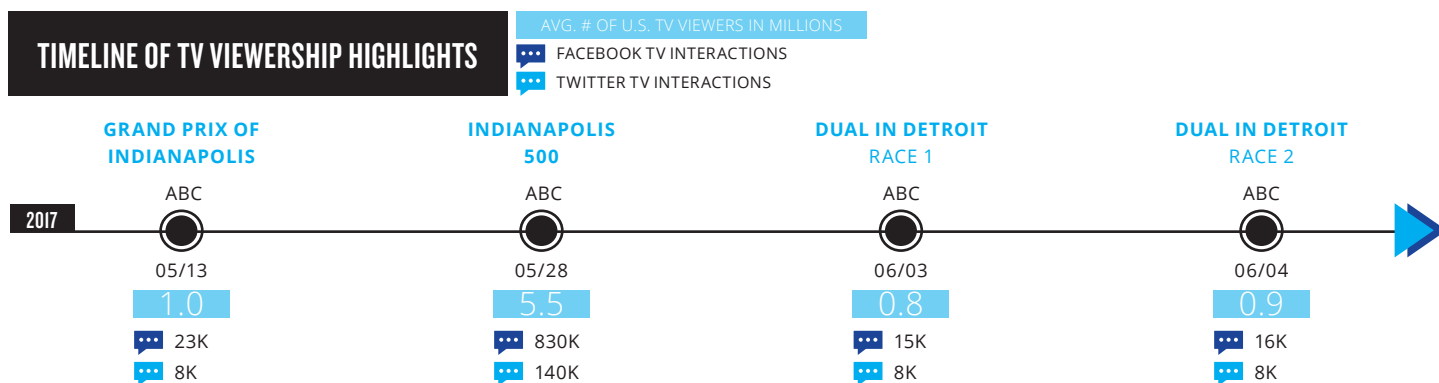
4.7

994K
116K

INDYCAR

INDYCAR DERIVED OPPORTUNITY FROM CHANGE.

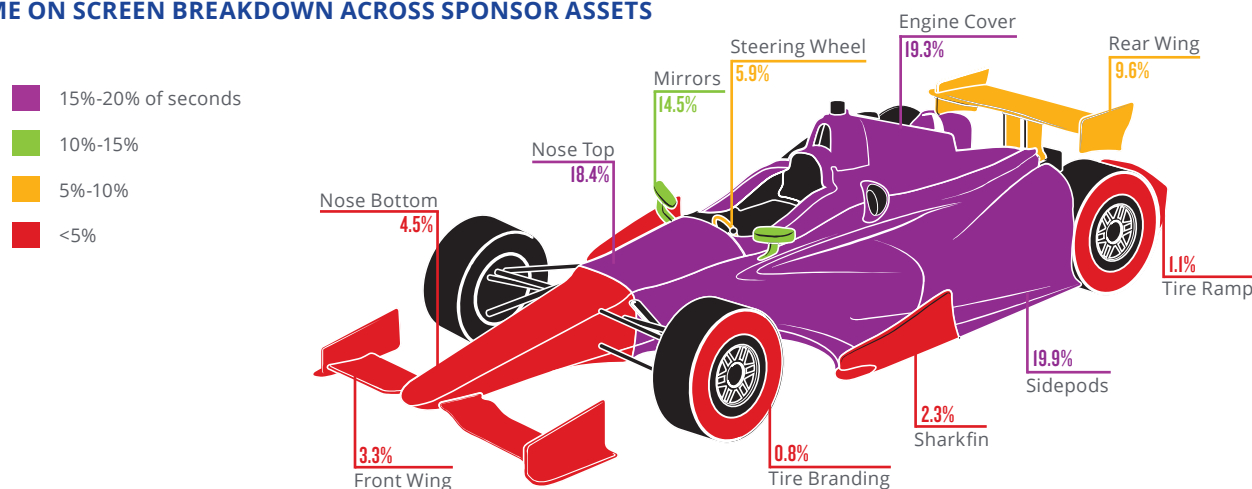
Heading into the final race of the 2017 Verizon IndyCar Series, only three points separated the top two drivers. This incredibly competitive balance contributed to a 12% year-over-year increase in the average number of minutes watched during race broadcasts. Also likely contributing to the increase in length of tune-in was INDYCAR's emphasis on in-car cameras giving fans enhanced perspective of the action while sponsors received a 14% overall increase in time on screen.



INDYCAR OFFERS NEW VANTAGE POINTS

In the 2017 Verizon IndyCar Series season, increased in-car vantage points, increased number of race telecasts watched and increased average minutes viewed resulted in additional visibility and value for sponsors. In-car cameras now capture the mirror, roof, rear wing and visor of many participating race cars, unlocking new sponsor opportunities.

TIME ON SCREEN BREAKDOWN ACROSS SPONSOR ASSETS



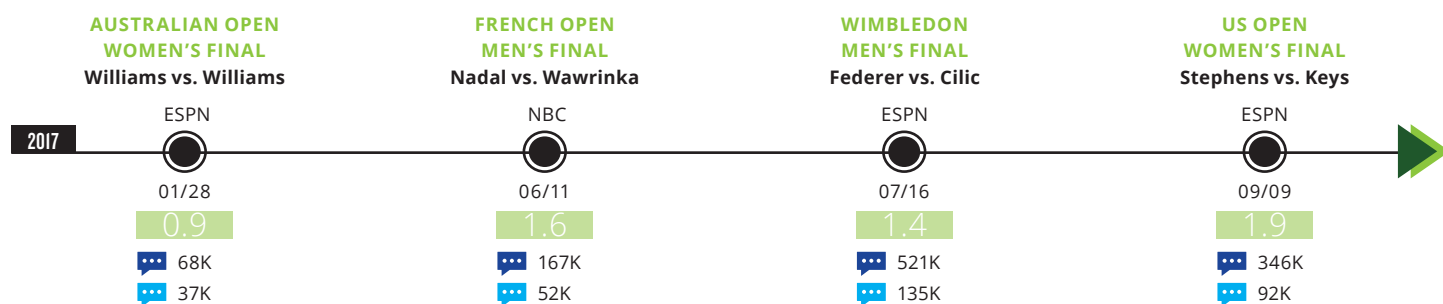
WHAT'S NEXT

INDYCAR's leveraging of new camera perspectives delivered positive results both from audience engagement across the average minutes watched as well as from a competitive commercial standpoint with sponsors earning additional time on screen. Rights holders will continue to look for innovative ways to deliver content to viewers in order to keep them engaged, help the content to evolve with shifting viewing habits and offer the best platform for their partners.

TENNIS

THE LEGENDS FOUGHT BACK TO THE TOP.

The 2017 Grand Slam season was one of the most memorable in recent history as the resurgence of aging legends on both the men's and women's side was truly amazing for tennis fans. Roger Federer and Rafael Nadal each added two more majors to their already full trophy cases and their epic five set match at the Australian Open Finals had US viewers up early in the morning (3 am EST start) and was up 100% versus 2016. On the women's side, Serena Williams faced off against her big sister, Venus, and set a record for the most slams in the open era with her 23rd slam at the Aussie Open while two months pregnant and drove viewership up 37% versus the prior year. Heading into 2018, it looks like the young rising stars of tennis are going to have to wait their turn just a bit longer.



TENNIS STARS SHINE ON- AND OFF-COURT

Although more viewers tuned in for the men's Australian Open competition, the Williams sisters' finals showdown garnered a more diverse audience. Black viewers made up more than one-third of the viewers reached by the Women's Final. Serena Williams then mobilized her fan base to root for the next generation of black female tennis stars, Madison Keys and Sloane Stephens, by cheering for them on social media during the US Open. The Williams sisters continue to use their personal platforms to change the face of their sport and its viewership, and their own appeal continues to grow. With N-Scores of 83 and 79, the Williams sisters were the most marketable pro athletes of 2017.

MEN'S AND WOMEN'S FINALS TV REACH BY RACE

THE MEN'S FINAL



THE WOMEN'S FINAL



White Other Black Asian or Pacific Islander American Indian/Alaskan native

FAN MEMORY

My favorite moment in tennis was when the public realized Serena Williams won the Australian Open at two months pregnant. This catapulted tennis to the driving role behind many of my both sports-related and girl-power-centric discussions.

Cara Salvatore, Nielsen Sports



THE MODERN FAN... CRAVES DYNAMIC ENGAGEMENT

WHAT'S NEXT



Sports stars will continue to help diversify the fan bases attracted to given leagues. Leagues will best maintain and strengthen these relationships beyond individual stars' careers by incorporating their espoused values into the culture of the sport.

ESPORTS

THE COMMERCIAL VALUE OF ESPORTS IS GROWING.

The esports industry is growing quickly, with new leagues, teams and distribution channels. This growth is attracting new high-profile esports investment from brands, media organizations and traditional sports rights holders. From 2016 through the middle of 2017, more than 600 esports sponsorship agreements were made. And, while technology, gaming and consumer electronics brands dominate, more nontraditional esports brands are entering the picture.

DRIVERS OF FUTURE ESPORTS ENGAGEMENT

As the esports audience and fan base grows, existing fans have identified key areas that are vital to future esports engagement including improving mainstream media accessibility, making esports competitions more accessible and providing more avenues for fans to compete.

WHICH OF THE FOLLOWING DO YOU FEEL WOULD MAKE YOU ENGAGE WITH ESPORTS MORE IN THE FUTURE?

47%

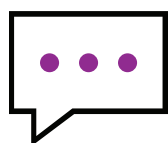
MORE ACCESSIBLE VIA
MAINSTREAM MEDIA

39%

SIMPLER/EASIER TO
ACCESS

38%

ABILITY TO COMPETE/
PARTICIPATE



34%

MORE SOCIAL INTERACTIONS



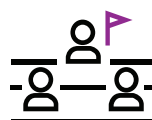
32%

MORE GAMES INVOLVED/
FEATURED



31%

MORE PROMINENT PART
OF POP CULTURE



30%

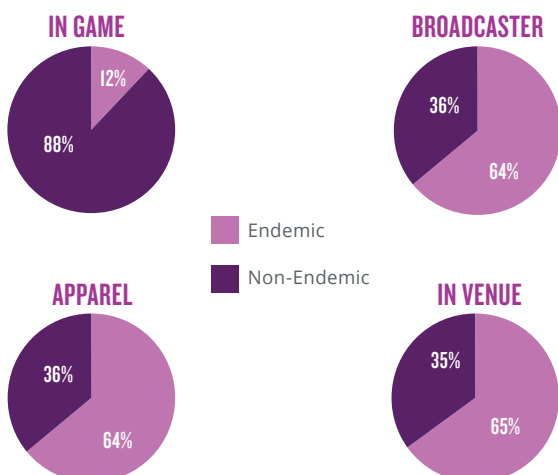
MORE LIVE EVENTS/
INTERACTIONS



NON-ENDEMIC BRANDS INTEGRATED INTO ESPORTS GAMES

Data from the U.S. show 58% of esports fans view brand activity positively and 37% have a neutral perception of brand activity. Fans viewed endemic and “semi-endemic” brands such as technology companies, energy drinks, carbonated beverages and snack foods as the most appropriate esports sponsors. Still, an assessment of 11 esports events in 2017 identified five out of the top 10 brand sponsors as endemic or “semi-endemic.” The non-endemic brands created a more authentic alignment by opting disproportionately for in-game sponsorship.

ENDEMIC/NON-ENDEMIC SPONSORSHIP BREAKDOWN



FAN MEMORY

“

My favorite moment did not occur in the arena, but rather in the news. Esports was announced to join the 2022 Asian games as a medal sport, and I could not be more excited for the sport. This is a major and necessary step in the right direction for esports to be considered a competitive sport, and not just an activity or hobby.

Chris Savino, Nielsen Sports

”



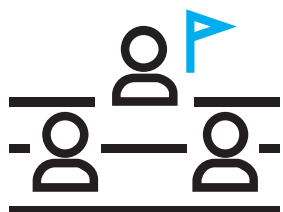
THE MODERN FAN... EXTENDS THE DEFINITION OF “SPORTS”

WHAT'S NEXT



This year, we will see the Overwatch League and the NBA 2K League kick off their inaugural seasons, a key indicator of esports' jump toward legitimacy among established sports. The combination of the new franchised league model and opportunity for high-profile sponsorship deals at the league and team level make these two leagues particularly interesting to watch in 2018.

THE MODERN FAN



STAYS CONNECTED THROUGH TECHNOLOGY

EXTENDS THE DEFINITION OF "SPORTS"

SEEKS SOCIAL CONNECTION

FUELS A COMMUNITY ECOSYSTEM

CRAVES DYNAMIC ENGAGEMENT

CRAVES AUTHENTICITY

GROWS WITH THE SPORT

TUNES IN FOR MANY REASONS

CONSTANTLY EVOLVES

DEFIES EXPECTATIONS

RECOGNIZES THE ROLE OF SPONSORSHIP





**SHAPES OUR
INDUSTRY.**

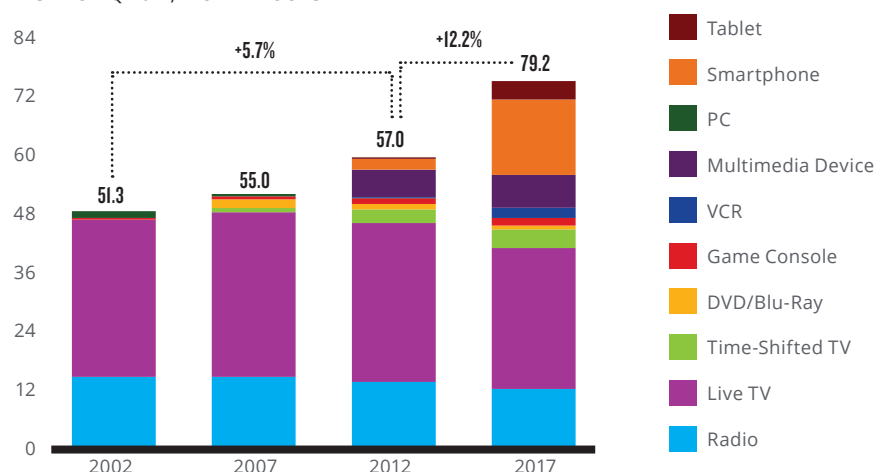


TRENDS

CONSUMERS EMBRACE MORE PROGRAMMING AND PLATFORMS

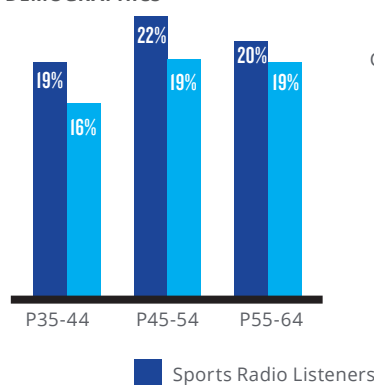
People 18+ consumed an average of over 79 hours of content per week, 28 more hours than in 2002, an almost 55% increase during that time. Tablets, smartphones and PCs accounted for a majority of the overall increase. Rather than neglect established platforms, this trend demonstrates a greater scope of opportunities for sports across mediums in 2018.

WEEKLY TIME SPENT BASED ON THE TOTAL U.S. POPULATION
BASED ON Q12017, P18+ BY HOURS

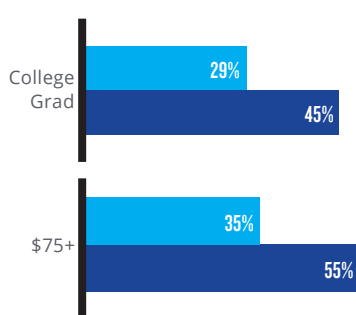


SPORTS RADIO REACHES THE QUALIFIED CONSUMER

SPORTS RADIO LISTENER DEMOGRAPHICS



EDUCATION AND INCOME

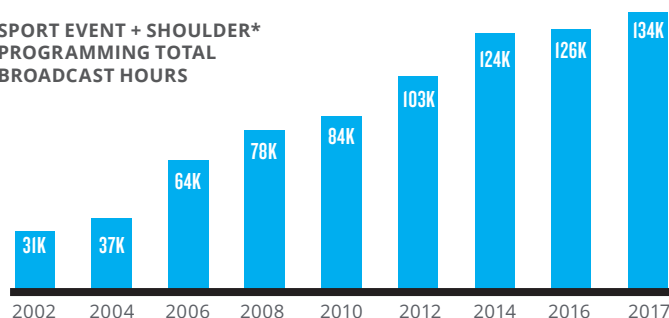


Educated, affluent sports audiences tuned in to radio in 2017. Of the 23 million Americans who tuned in to sports radio weekly, eight out of 10 were employed. They over-indexed on incomes \$75k+ and college education. Sports radio in 2017 attracted a median age listener of 44 years old, compared to 48 and 49 on cable and broadcast television, respectively. Radio will continue to attract brands and sponsors to its thriving ecosystem in 2018.

SPORTS EVENTS DRIVE TELEVISION AUDIENCES

Access to sports content is at a 15-year high across television. Despite the potential for audiences to disperse, "Sports" still accounted for 86 of the top 100 telecasts viewed Live+SD** in 2017. As audiences connect with remote fans across social platforms, they will continue to congregate in person around TV.

SPORT EVENT + SHOULDER* PROGRAMMING TOTAL BROADCAST HOURS



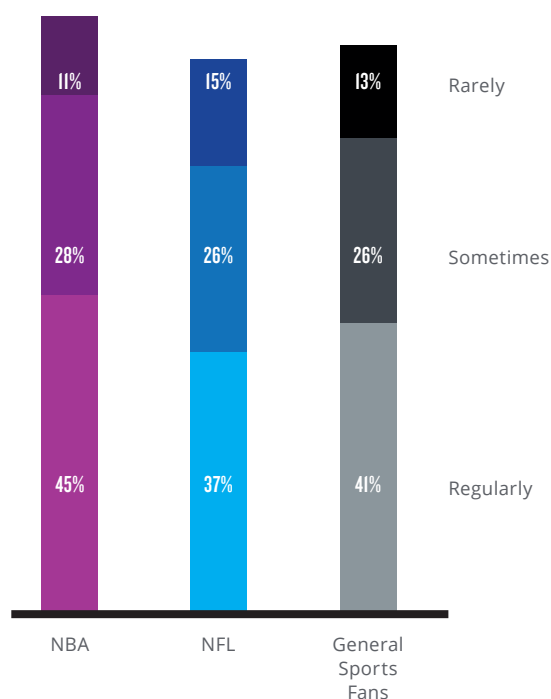
*Shoulder programming includes sports anthology, commentary and news.

**Includes telecasts 15 minutes in duration or longer, includes pre and post event telecasts.

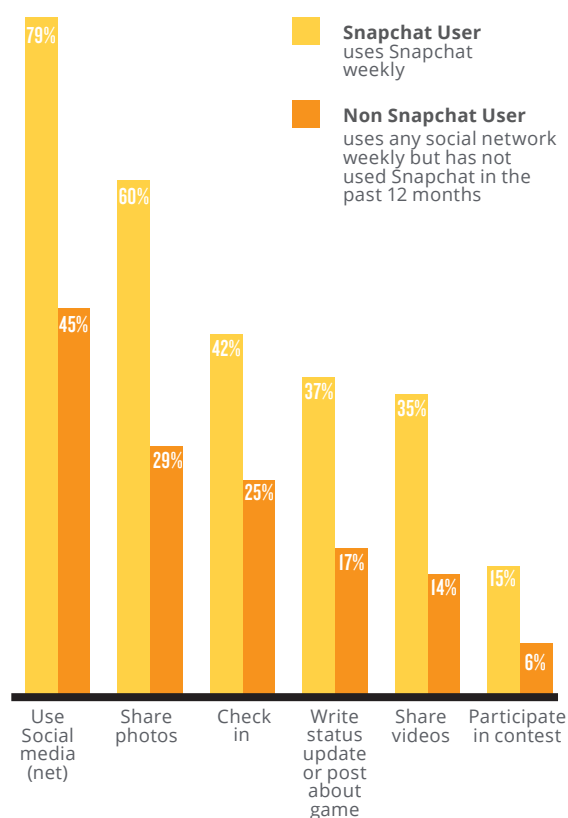
TOP 100 RATED TELECASTS (LIVE+SD)**



NBA FANS ARE MOST ENGAGED ON SOCIAL MEDIA



FANS' IN-GAME SOCIAL MEDIA HABITS



OTT SPURS INNOVATION ACROSS SPORTS

In April of 2017, Google announced its YouTube TV service, which combines live channels, on-demand video and DVR, with a particular emphasis on broadcast networks and sports. In September, Amazon's Prime Video began offering a series of 11 live NFL "Thursday Night Football" games to its members. Twitter streamed weekly MLB games, and Facebook similarly worked to incorporate sports.

INTERACTIONS RELATED TO CHAMPIONS LEAGUE FINAL



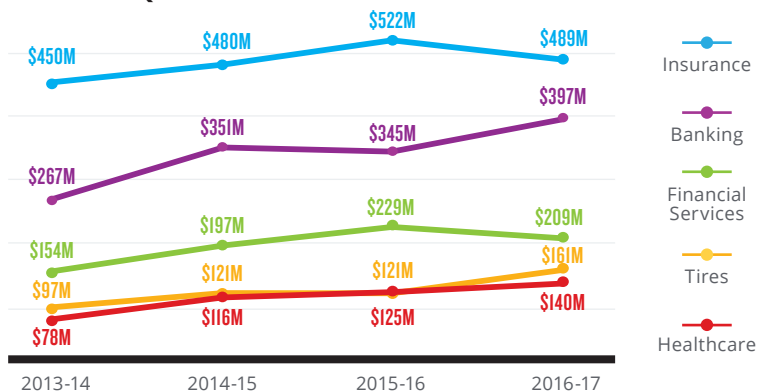
**Includes telecasts 15 minutes in duration or longer, includes pre and post event telecasts.

TRENDS

THE OPPORTUNITY SET EXPANDS AROUND SPONSORSHIP

Sponsorship across the “Big Four” leagues, PGA Tour, NASCAR and INDYCAR accounted for \$7.35 billion in Q1 Media Value in 2017, a \$54 million increase over the last year. Banking, financial services and healthcare collectively averaged 8% growth per year over the last three years. The shifts in brand exposure across categories speak to the ongoing richness of the sports sponsorship environment and its ability to facilitate new brand opportunities in 2018.

2013-2017 Q1 MEDIA VALUE ACROSS SELECT CATEGORIES

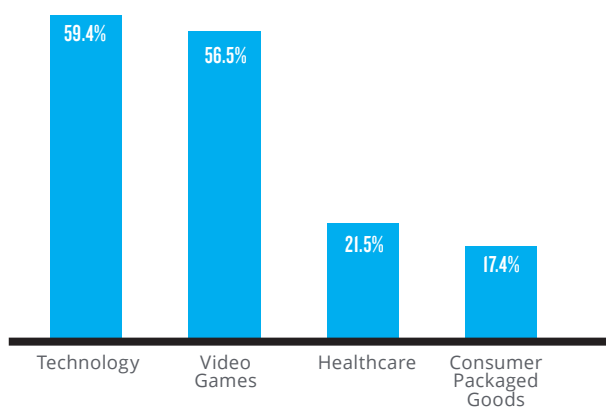


VIDEO GAMING-RELATED CATEGORIES DRIVE Q1 MEDIA VALUE

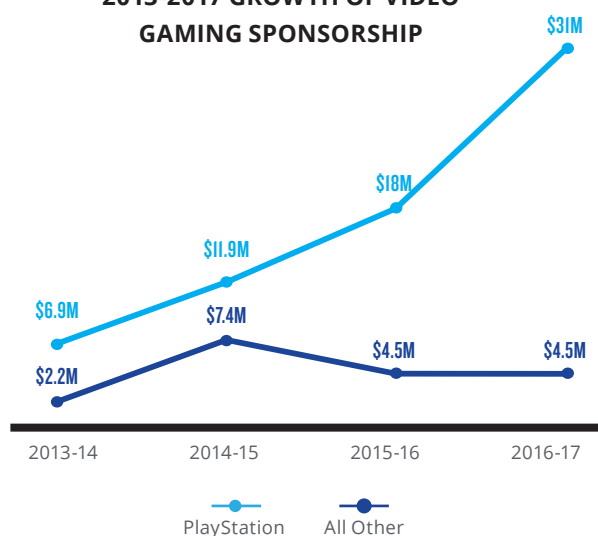
The newcomers of video gaming, technology and consumer electronics sponsorship categories merit particular mention for their rapid growth in Q1 Media Value in 2017. Led by Sony PlayStation’s partnership with and growing presence in the NBA, the video gaming category nearly doubled in Q1 Media Value from 2016 to 17. Gains in Q1 Media Value for technology and consumer electronics come from increases in both NFL stadium and NBA arena presence. As esports drives sports toward the digital age, technologically oriented brands will continue to derive value from exposure across fan bases.

YEAR-OVER-YEAR LARGEST-GROWING CATEGORIES IN SPONSORSHIP

(2016-2017)

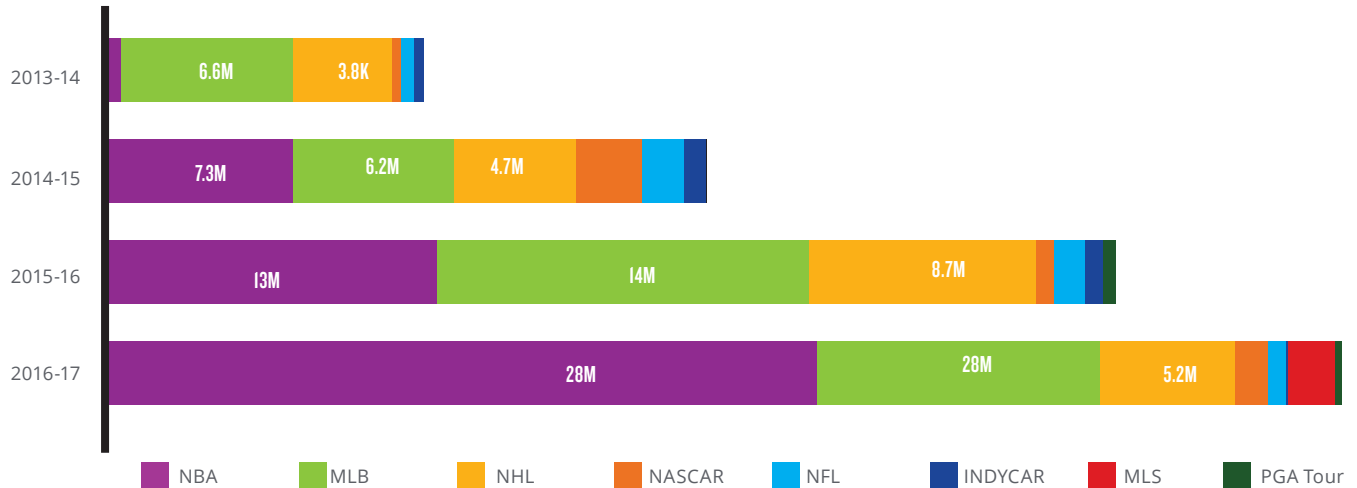


2013-2017 GROWTH OF VIDEO GAMING SPONSORSHIP



*Footnote: Q1 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 Q1 Media Value takes into account the quality and weight of exposure, audience size and cost per thousand.

2013-2017 TECHNOLOGY AND VIDEO GAMES SPONSORSHIP



SOCIAL MEDIA EXPOSURE COMPLEMENTS IN-STADIUM ENGAGEMENT

Brands that **activate sponsored content** with teams using hashtags or logo graphics can see

↑ 50% SOCIAL MEDIA VALUE UPLIFT

in addition to TV exposure value. This comes from full season tracking of brand partners through team-owned and -operated social media handles.

Brands **included in social media imagery** from in-venue sponsorship typically generate

↑ 5-10% MEDIA VALUE UPLIFT

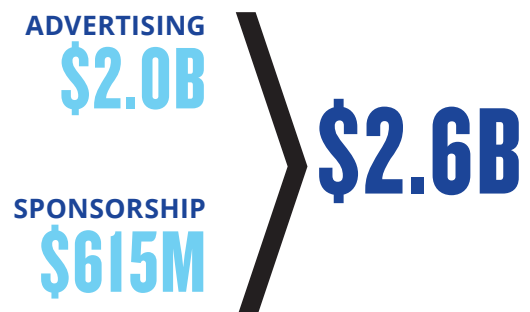
Sponsors captured in ambient imagery on social media from in-venue signage typically earn 5-10%... on top of TV exposure value from team-owned and -operated social media handles.

Alongside the evolution of sponsorship categories comes new sponsorship mediums. Social media offers brands a direct connection to sports fans of specific clubs and teams. Sports fans turn to social media for exclusive content and highlights at their fingertips that are not always shown on linear TV. Rights holders (teams and leagues) are able to quantify the exposure value their sponsors receive through social media, incremental to linear TV, allowing a holistic valuation of the partnership. Brands are able to understand the incremental value their sponsorships are receiving through social media, helping justify sponsorship decisions with specific rights holders.

LEGAL BETTING WILL DRIVE ADVERTISING AND SPONSORSHIP SPEND

The legality of sports betting in 2018 remains unknown, but its prospective impact on advertising and sponsorship could be significant. The Professional and Amateur Sports Protection Act (PASPA) of 1992 prohibits U.S.-based sports gambling with a couple of exceptions outside of Nevada. New Jersey prefers the question of sports betting's legality rest with the states. If the U.S. Supreme Court rules in favor of New Jersey and gives individual states a say in sports betting, the category will become a major new advertising and sponsorship category for the leagues and networks. Using the ad/sponsorship spend by sports betting companies in the UK and Australia where sports betting is legal, Nielsen projects that it will generate over \$2.6 billion for U.S.-based leagues, teams and media companies if the majority of states pass sports betting legislation.

PROJECTED BETTING MARKET IN U.S.



TOP ADVERTISERS & SPONSORS

BRANDS RANKED SEPARATELY BY TV ADVERTISING SPEND (FROM NIELSEN AD INTEL) AND SPONSORSHIP Q1 MEDIA VALUE (FROM NIELSEN SPORT24) PER SPORT

Rank	NFL Top Advertisers
1	Verizon
2	Anheuser-Busch
3	Apple
4	Ford
5	Samsung

Rank	NFL Top Sponsors
1	Nike
2	Gatorade
3	Bose
4	Microsoft
5	Under Armour

Rank	NBA Top Advertisers
1	Samsung
2	Kia
3	Warner Bros.
4	Burger King
5	State Farm

Rank	NBA Top Sponsors
1	State Farm
2	Gatorade
3	Tissot
4	Spalding
5	Oracle

Rank	MLB Top Advertisers
1	Google
2	GEICO
3	Chevrolet
4	Apple
5	Taco Bell

Rank	MLB Top Sponsors
1	YouTube
2	State Farm
3	Anheuser-Busch
4	Bank of America
5	Gatorade

Rank	NHL Top Advertisers
1	Honda
2	Lexus
3	GEICO
4	Discover
5	MillerCoors

Rank	NHL Top Sponsors
1	GEICO
2	Honda
3	Enterprise
4	Gatorade
5	Bridgestone

Top sponsors based on U.S. exposure value: NFL, UFC, NASCAR, INDYCAR

Top sponsors based on U.S. and Canada exposure value. Canada value tracked when acting as a local market: NHL, MLB, MLS

UFC not part of Nielsen Sport24 tracking; measurement across primary octagon branding

Rank	MLS Top Advertisers
1	Heineken
2	Audi
3	Continental Tire
4	Southern New Hampshire University
5	Wells Fargo

Rank	MLS Top Sponsors
1	Adidas
2	Audi
3	Heineken
4	Continental Tire
5	Target

Rank	PGA TOUR Top Advertisers
1	Mercedes-Benz
2	PGA Tour
3	Callaway
4	Acushnet
5	Microsoft

Rank	PGA TOUR Top Sponsors
1	Nike
2	TaylorMade
3	Adidas
4	Under Armour
5	Callaway

Rank	UFC Top Advertisers
1	T-Mobile
2	GEICO
3	Pay-Per-View
4	Anheuser-Busch
5	Sony

Rank	UFC Top Sponsors
1	Monster Energy
2	MetroPCS
3	Harley-Davidson
4	Performance Inspired
5	Budweiser

Rank	NASCAR Top Advertisers
1	AstraZeneca Pharmaceuticals
2	Ford
3	Chevrolet
4	Toyota
5	Coca-Cola

Rank	NASCAR Top Sponsors
1	Monster Energy
2	Ford
3	Toyota
4	Chevrolet
5	Xfinity

Rank	INDYCAR Top Advertisers
1	Verizon
2	Chevrolet
3	Chattem
4	Honda
5	Bridgestone

Rank	INDYCAR Top Sponsors
1	Honda
2	Verizon
3	Firestone
4	PennGrade Motor Oil
5	Chevrolet

TOP ADVERTISERS (CONTINUED)

Rank	NCAA Basketball Top Advertisers
1	Coca-Cola
2	Capital One
3	Buick
4	AT&T
5	Samsung

Rank	NCAA Football Top Advertisers
1	Nissan
2	Dr Pepper
3	DIRECTV
4	GEICO
5	Allstate

Rank	BOXING Top Advertisers
1	Crown Imports
2	GEICO
3	T-Mobile
4	Anheuser-Busch
5	Heineken

Rank	TENNIS Top Advertisers
1	IBM
2	Lincoln
3	GEICO
4	Mercedes-Benz
5	DIRECTV



SOURCES

n

○ TIMELINE TV VIEWERS

- National TV Toolbox, Ratings Analysis, January 2017 - February 2018, P2+ and Live+SD (OOH excluded)

○ SOCIAL

- Nielsen Social Content Ratings. Total linear interactions for Twitter owned & organic and Facebook organic. January 01, 2017 - February 05, 2018. Broadcast, national cable and first-run syndication. New episodes and programs. For events spanning multiple days, metrics reflect a total of interactions unless otherwise specified.

NFL

○ INTRODUCTION

- Nielsen National TV View, September 2017 - December 2017, P2+
- Sponsorlink USA, September 2017 - December 2017
- Nielsen National TV View, Ratings Analysis, P2+ and Live+SD Viewing, January 2017 - December 2017, excluding telecasts <15 minutes

○ STORY 1 & 2

- TV Viewers: National TV Toolbox, September 2017 - December 2017, HH, P2+, P18-24, M18-24, F18-24, M18-34, P18-34, F18-34, Time Zone = Eastern, Pacific, National Sample & Out of Home Sample

NBA

○ INTRODUCTION

- National TV Toolbox, Ratings Analysis, January 2017 - February 2018, P2+ and Live+SD (OOH excluded)

○ STORY 1

- Sport24, Social 24, Duration, QI Media Value, NBA, October 2017 - December 2017
- Nielsen Sports Sport 24 TV data only 10/01/17 - 12/31/17

MLB

○ STORY 1

- Exposure timestamps of "Stranger Things 2" branding: Sport24, MLB October 2017, timestamps used in a 2-minute interval around the time of the exposure.
- Viewership: National TV Toolbox, Reach & Frequency Duplication Report, P2-17, P18-34, Live Viewing, "Stranger Things 2" viewing 10/27/17 - 11/2/17 with 6-minute reach qualifier, MLB Championship Series viewing based on 2-minute interval of "Stranger Things 2" brand exposures with 1-minute reach qualifier

○ STORY 2

- Sport24, Duration, QI Media Value, MLB, October 2017 - November 2017

NHL

○ STORY 1

- Nielsen N-Score, Overall N-Score, Awareness and Likeability
Nielsen N-Score Fan Affinity, NHL Playoffs-NBCSN
Nielsen Music Connect, Genre: Country, On-Demand Audio Streams for National and Nashville DMA
Playoffs: 04/13/2017 - 06/15/2017
Non-Playoffs (Playoffs Comparison): 02/2/2017 - 04/6/2017
Stanley Cup: 05/25/2017 - 06/15/2017
Non-Stanley Cup (Stanley Cup comparison): 03/16/2017 - 04/6/2017

○ STORY 2

- Local RSN Ratings: Nielsen Local TV View, Ratings Analysis
Regular Season: October 2016 - April 2017 and October 2017 - December 8, 2017, Local Broadcasts, Household, Live+SD, DMA: Nashville, Networks/Stations: Fox Sports Tennessee, NBCSN
- National Stanley Cup Ratings: Nielsen National TV View, Ratings Analysis, 2017 Stanley Cup: June 2017, P2+, Live+SD, Games on NBC and NBCSN

SOURCES

MLS

○ STORY 1

- Local TV View, Ratings Analysis, October - December 2017, Live MLS Playoff Games on ESPN, Live+SD, HH Ratings, Markets: Cincinnati, Detroit, Nashville, Sacramento-Stockton-Modesto
- Scarborough, 2017, Release 2, Activities Past 12 Months - Soccer, Markets: Cincinnati OH, Detroit MI, Nashville TN, Sacramento CA

SOCCKER

○ STORY 1

- TV with Digital | Linear with VOD, V2+, 12/01/2016 - 12/03/2017, all major sporting events vs. NWSL
- Nielsen, Live+SD, Saturday NWSL pre-games & games on Lifetime (4/15 - 10/14/17) vs. 2016 NWSL on FS1 (9/7 - 10/9/16)
- Nielsen National TV Toolbox; Reach & Frequency Report; Live+SD; TV Linear with VOD; P2+; 4/15/17 - 10/14/17 for NWSL, 8/13/16 - 5/21/17 for other leagues; NWSL on Lifetime Network; La Liga on BEIN Sport, BEIN Sport Espanol; Bundesliga on FOX, FS1, FS2; EPL on NBC, NBCSN; Live and Repeat telecasts included; 6-minute reach qualifier, 75% sample unification

○ STORY 2

- National TV Toolbox, P2+ & P18-34, Live+SD; Liga MX Clausura 2017: 1/6/17 - 5/28/17 games on UNI & UMA; EPL 2016-2017: 8/13/16 - 5/21/17 games on NBC

GOLF

○ INTRODUCTION

- National TV View, December 2016 - December 2017, P2+, Live+SD
- Nielsen N-Score, Overall N-Score

○ STORY 1

- National TV View, December 2016 - December 2017, P2+, Live+SD, Live tournament telecasts only
- Top Golfer Sponsorship Branding - Golf24 PGA Tour 2016-17 Full Season: Global QIMV

○ STORY 2

- SportsDNA May 2017 Wave

UFC + BOXING

○ INTRODUCTION

- Showtime Sports Dec. 14, 2017, Press Release

○ STORY 1

- National TV View, December 2016 - December 2017, P2+, Live+SD
- U.S. Sponsorlink January 2017 - December 2017

○ STORY 2

- Sponsorlink USA January 2017 - December 2017

NCAA BASKETBALL & FOOTBALL

○ STORY 1

- TV Viewers: National TV Toolbox, March 2017 - April 2017, P2+ and Live+SD, National Sample and Out of Home Sample
- Scarborough USA + 2017 Release 1 *Reissue 9-18-2017* Total (Dec 2015 - Apr 2017)

○ STORY 2

- TV Viewers: National TV Toolbox, December 2017 - January 2018, P2+ and Live+SD, National Sample and Out of Home Sample
- Scarborough USA + 2017 Release 1 *Reissue 9-18-2017* Total (Dec 2015 - Apr 2017)

NASCAR

○ STORY 1

- Nielsen RMS Data: Nielsen Answers On Demand, XAOC+Convenience \$ Sales (1/1/2016 - 9/30/2017); Nielsen Matched Panel Analysis Study (2017)

○ STORY 2

- Nielsen Social. 2017 races included interaction: GoBowling 400, Toyota Save Mart 350, Coke Zero 400, I LOVE NEW YORK 355, Bojangles' Southern 500, Tale of the Turtles 400. Sport24: Linear QI Media Value, Social24: Social QI Media Value.

INDYCAR

INTRODUCTION

- Nielsen National Toolbox, Reach Analysis, March 2016 - September 2016, March 2017 - September 2017, P2+, Sport24: INDYCAR (2016 + 2017 Seasons).

STORY 1

- Nielsen National Toolbox, Reach Analysis, March 2016 - September 2016, March 2017 - September 2017, P2+, Sport24: INDYCAR (2016 + 2017 Seasons).

WHAT'S NEXT

- Nielsen National Toolbox, Reach Analysis, March 2016 - September 2016, March 2017 - September 2017, P2+.

TENNIS

INTRODUCTION

- National TV Toolbox, Ratings Analysis, January 2017 - February 2018, P2+ and Live+SD (OOH excluded)

STORY 1

- Nielsen N-Score
- National TV Toolbox, January 27 - 29, 2017, P2+, Live+SD. Includes Live telecasts at 3am on ESPN, as well as repeat telecast at 9am on ESPN2 for both Men's and Women's Finals, 6-minute reach qualifier, 75% sample unification

ESPORTS

INTRO

- Nielsen 2017 Esports Report Q4

STORY 1 & 2

- Nielsen 2017 Esports Report Q4
- Top Sponsor Brands: Nielsen Esport24, QI Media Value

VIEWER TRENDS

INTRODUCTION

- Nielsen Total Audience Report and Audience Insights Analysis

RADIO

- TAPSCAN™ Web National Regional Database Spring 2017, AQH Persons 12+, M-SU 6a-12M National TV View, January 2004 - November 2017, P2+, Live+SD, Live Telecasts Only on Specified Networks

TV

- Nielsen National TV View, Ratings Analysis, Live+SD Viewing. Content Categories: Sports Events and Sports Shoulder Programming (Anthology, Commentary, News)
- Nielsen National TV View, Ratings Analysis, P2+ and Live + SD Viewing, January 2017 - December 2017, excluding telecasts <15 minutes

SOCIAL

- Nielsen Sports 360: Nielsen Sports' syndicated global tracking study SportsDNA, May 2017 wave. Fans for each league defined as 4 or 5 on a 1-to 5 point interest scale.

OTT

- <https://www.facebook.com/iq/articles/2017-uefa-champions-league-final-on-facebook-and-instagram>

SOURCES

SPONSOR TRENDS

INTRODUCTION

- Top Sponsor Brands: Sport24 2016-2017, Full Season: Q1 Media Equivalency, U.S. Market

GAMING

- Top Sponsor Brands: Technology and Video Games, Sport24 2016-2017, Full Season: Q1 Media Value by Season, U.S. Market
- Largest Growing Categories: PlayStation Chart: Q1 Media Value of Tech and Video Games

SOCIAL

- Nielsen National TV View, Ratings Analysis, Live+SD Viewing. Content Categories: Sports Events and Sports Shoulder Programming (Anthology, Commentary, News)
- Nielsen National TV View, Ratings Analysis, P2+ and Live+SD Viewing, January 2017 - December 2017, excluding telecasts <15 minutes

BETTING

- Figures projected by using ratios of GDP, Population, and Percentage of Overall Market comparing the U.S. market to UK and Australia markets, which have a legal sports gaming environment; UK and Australia figures from Nielsen Ad Intel (National advertising including Network TV, Cable TV, Digital, Magazine, Newspaper, Radio, Outdoor), Nielsen Sports SponsorGlobe, Nielsen Sport24; Projection Ratios based on US Census Bureau, World Bank; All Values projected in USD

TOP ADVERTISERS AND SPONSORS

TOP ADVERTISERS

- Ad Intel Q4 2016 - Q3 2017, National TV

NFL TOP SPONSORS

- Top Sponsor Brands: Sport 24 NFL season, 2017-2018 Full Season: Q1 Media Value, U.S. Market

NBA TOP SPONSORS

- Top Sponsor Brands: Sport 24 NBA season, 2016-2017 Full Season: Q1 Media Value, U.S. Market

MLB TOP SPONSORS

- Top Sponsor Brands: Sport 24 MLB season, 2017 Full Season: Q1 Media Value, U.S. Market

NHL TOP SPONSORS

- Top Sponsor Brands: Sport 24 NHL season, 2017-2018 Full Season: Q1 Media Value, U.S. Market

MLS TOP SPONSORS

- Top Sponsor Brands: Sport 24 MLS season, 2017 Full Season: Q1 Media Value, U.S. Market

PGA TOP SPONSORS

- Top Sponsor Brands: Sport 24 PGA Tour 2016-2017 Full Season: Q1 Media Value, Global, Includes Course, Broadcast, and Player Assets

UFC TOP SPONSORS

- Q1 Media Value, U.S. Market measurement across primary UFC octagon branding

NASCAR TOP SPONSORS

- Top Sponsor Brands: Sport 24 NASCAR (Three National Series: Monster Energy NASCAR Cup Series, NASCAR XFINITY Series, NASCAR Camping World Truck Series), February 2017 - November 2017, Full Season: Q1 Media Value, U.S. Market, Excludes NASCAR brand

INDYCAR TOP SPONSORS

- Top Sponsor Brands: Sport 24 Verizon IndyCar Series, March 2017 - September 2017, Full Season: Q1 Media Value, U.S. Market, excludes INDYCAR brand (Verizon and Verizon IndyCar Series brands have been combined to "Verizon" brand in ranking)

ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global measurement and data analytics company that provides the most complete and trusted view available of consumers and markets worldwide. Our approach marries proprietary Nielsen data with other data sources to help clients around the world understand what's happening now, what's happening next, and how to best act on this knowledge. For more than 90 years Nielsen has provided data and analytics based on scientific rigor and innovation, continually developing new ways to answer the most important questions facing the media, advertising, retail, and fast-moving consumer goods industries. An S&P 500 company, Nielsen has operations in over 100 countries, covering more than 90% of the world's population. For more information, visit www.nielsen.com.

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THE SCIENCE BEHIND WHAT'S NEXT™



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