



NO DAYS OFF!

Celebrating The Everyday Communal Experience Of Sports

☰ 2017 REPORT

Members Center

 **VAB**
VIDEO ADVERTISING BUREAU

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Game Plan

To some, sports is life. To many others, it's a central passion point. And to almost all, it represents compelling, engaging and consistent content fueled by the combination of real-life action and drama (the intersection of which we colloquially refer to as “score-ylines”) unfolding before their eyes.

With almost 11,000 national live sporting events airing annually, TV viewers have the opportunity to indulge in one of their favorite passions - sports - literally every single day of the year. Whether it's football, baseball, basketball or international cricket, there is always something live on TV with an average of 8 major sports, along with countless niche ones, active in any month.

It's the “No Days Off” programming calendar that places TV at the heart of the sports ecosystem. Television feeds a virtually never-ending stream of content to mobile apps and alternative devices; it creates limitless conversations on social media, blogs and sports-related websites; and it brings friends, soon-to-be friends, family, fellow alumni and people who share common interests together in a communal experience where passion elicits emotion on any given day.

People have an insatiable appetite for content of any kind that surrounds their passions and, for sports, it all begins with TV and multi-screen TV brands.

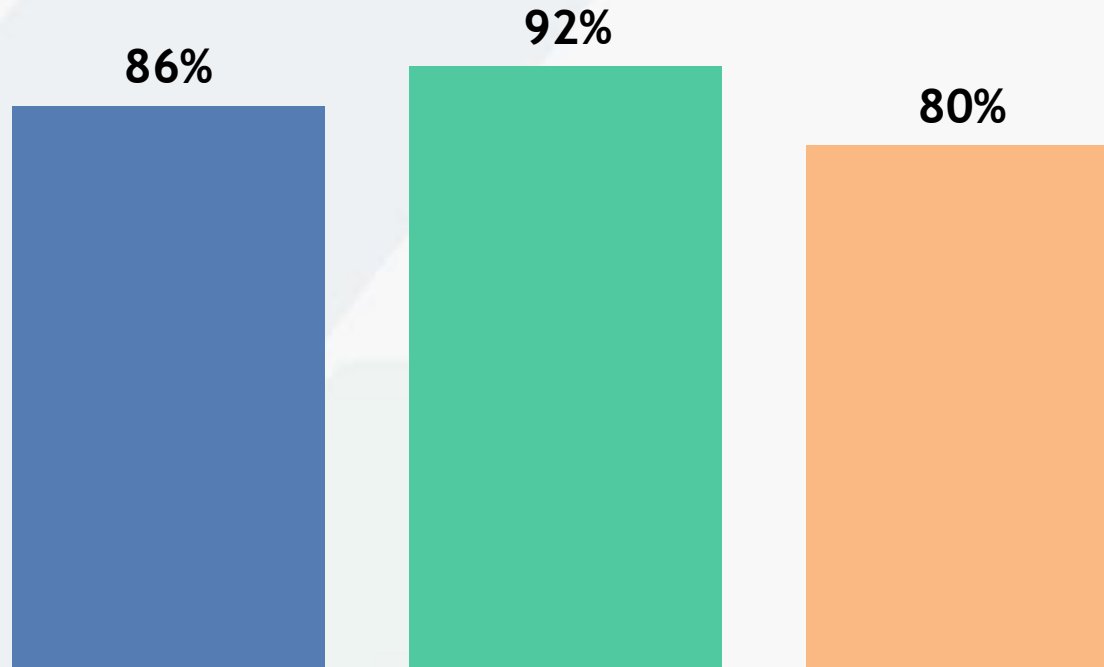


The Passion For Sports Never Rests

Sports Are Almost Universally Watched & Followed, To At Least Some Extent, By Most Of The Population

Within this universe, almost one-quarter (24%) of respondents consider themselves an “intense” sports fan

■ Persons 15-74 ■ Males 15-74 ■ Females 15-74



Are You A Sports Fan?

NO DAYS OFF!



Although The NFL Remains King, Several Other Sports Draw A Rather Significant Following

Eight different sports are followed regularly by at least 20% of American sports fans

Which Sports Do You Follow?



(NFL Football)

81%



(Baseball)

54%



(College Football)

48%



(NBA Basketball)

46%



(College Basketball)

35%



(Ice Hockey)

23%



(Boxing)

22%



(NASCAR)

20%



(Tennis)

17%



(Golf)

17%



(Extreme Sports)

16%



(MMA)

16%



(Gymnastics)

13%



(MLS Soccer)

11%

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People Are Passionate About Sports And Fans' Passion Is Driven By Several Factors

Traditional Powerhouses



Contemporary Winners



Wily Veterans & Dynamic Youngsters



Team, School & Athlete Rivalries



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This Passion Around Sports Is Further Fueled By “Score-y-lines” Which Engage Viewers Well Beyond Just The Numbers

“Score-y-lines” sit at the intersection of outcomes and interests; they humanize an event’s results to engage even the most casual of sports fans (i.e., “the masses”)

Scores

Chicago Cubs win Game 7 of the World Series 8-7 in extra innings



Cleveland Cavaliers defeat Golden State in Game 7 of the NBA Finals 93-89



Sergio Garcia wins the 2017 Masters in a one-hole playoff



NO DAYS OFF!

Storylines

The victory ended 108 years of championship futility for one of the most iconic pro teams



Cleveland, led by returning hometown star LeBron James, came back from down 3-1 against the winningest regular season team ever



Garcia’s win finally ends his 0-73 drought in majors tournaments



Beyond The Historic World Series Or Epic NBA Finals, The Past Year Has Featured A Never Ending Stream Of “Score-y-lines”

Patriots overcomes the largest deficit in Super Bowl history to defeat the Atlanta Falcons



Leicester City's beats 5000-1 odds to win the English Premier League



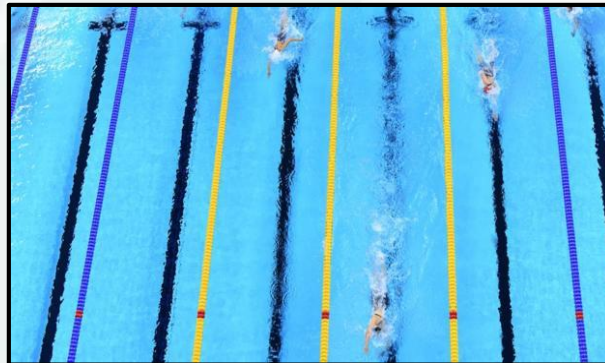
Mississippi State stuns UCONN in the Final Four, ending their 111 game winning streak



Former walk-on wide receiver scores winning TD in Clemson's thrilling National Championship victory over Alabama



American swimmer Katie Ledecky obliterates the competition at the Summer Olympics, winning the 800m freestyle by almost 12 seconds



Kobe Bryant scores 60 points in his final game on the same night that Golden State wins their record-breaking 73rd game



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Looking At This Year's Sports Calendar, Memorable "Score-y-lines" Can, And Will, Happen On Any Day Of The Year

Several major sports overlap each other throughout the year, culminating in November when all the top sports are active.

Calendar For 10 Major Sports

Sport	January					February				March				April				May					June				July					August				September				October					November				December			
	W1	W2	W3	W4	W5	W1	W2	W3	W4	W1	W2	W3	W4	W1	W2	W3	W4	W1	W2	W3	W4	W5	W1	W2	W3	W4	W1	W2	W3	W4	W5	W1	W2	W3	W4	W1	W2	W3	W4	W5	W1	W2	W3	W4	W1	W2	W3	W4				
NFL	Post-Season		SB											Draft												Pre-season		Regular Season																								
MLB						Spring Training				Regular Season										Post-Season																																
NBA	Regular Season										Post-Season					Draft									Pre-season		Regular Season																									
NHL	Regular Season										Post-Season					Stanley Cup						Pre-season		Regular Season																												
NCAA Football	Bowls																							Regular Season										Bowl Games																		
NCAA Basketball	Regular Season								March Madness																		Regular Season																									
Golf	Regular Tour															Cup Playoffs								Regular Tour																												
Soccer	EPL Regular Season					MLS & EPL Regular Season									MLS Regular Season				MLS & EPL Regular Season					MLS Post-Season		MLS Cup																										
NASCAR						Regular Season										Chase For The Cup																																				
Tennis	ATP Tour																																																			
Active Sports by Month	8					9				8				9				7					7				5					7				7				9					10				6			

Since 89% of sports fans follow more than one team and 88% follow more than one sport, there's plenty of action to keep a fan satisfied no matter the month.

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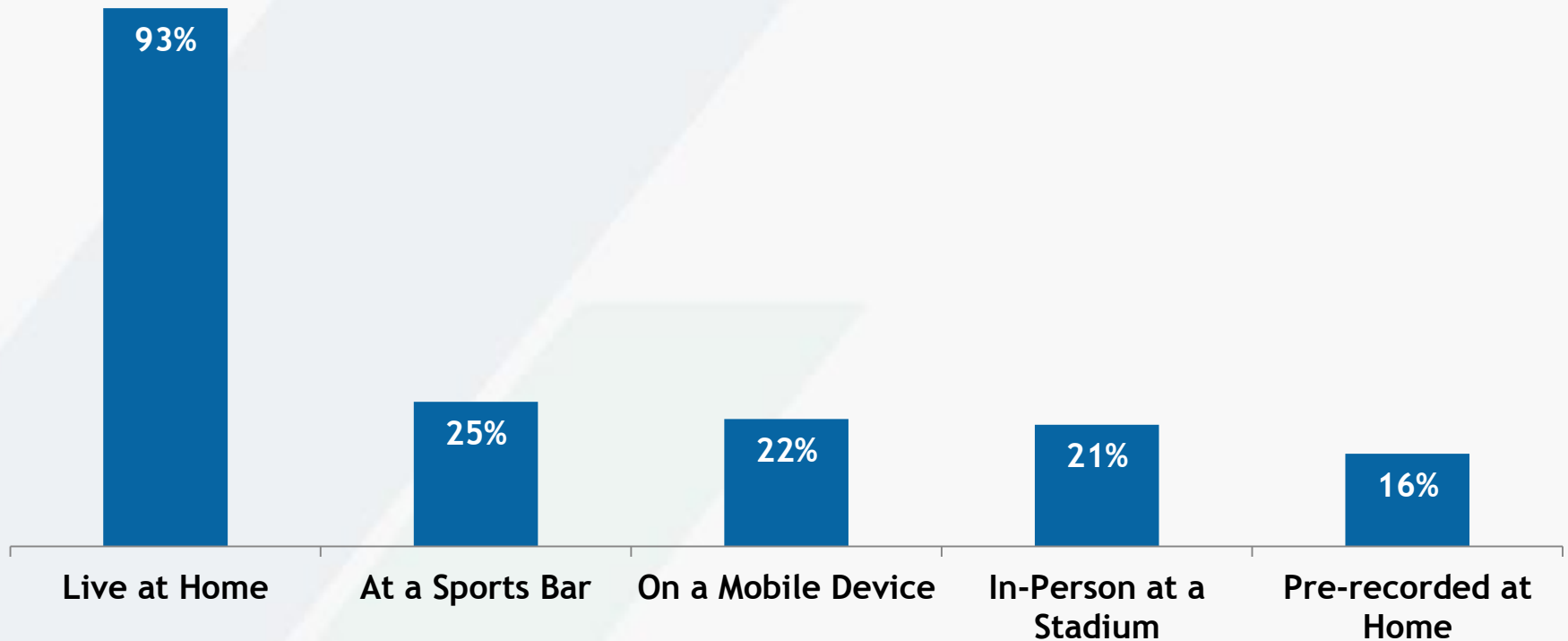




“Wide World Of Sports”: Omnichannel Ecosystem

Fans Predominately Watch Sports Live At Home, Although About One-Quarter Will Catch Games At A Bar Or On The Go

Where Do You Typically Watch Sports?



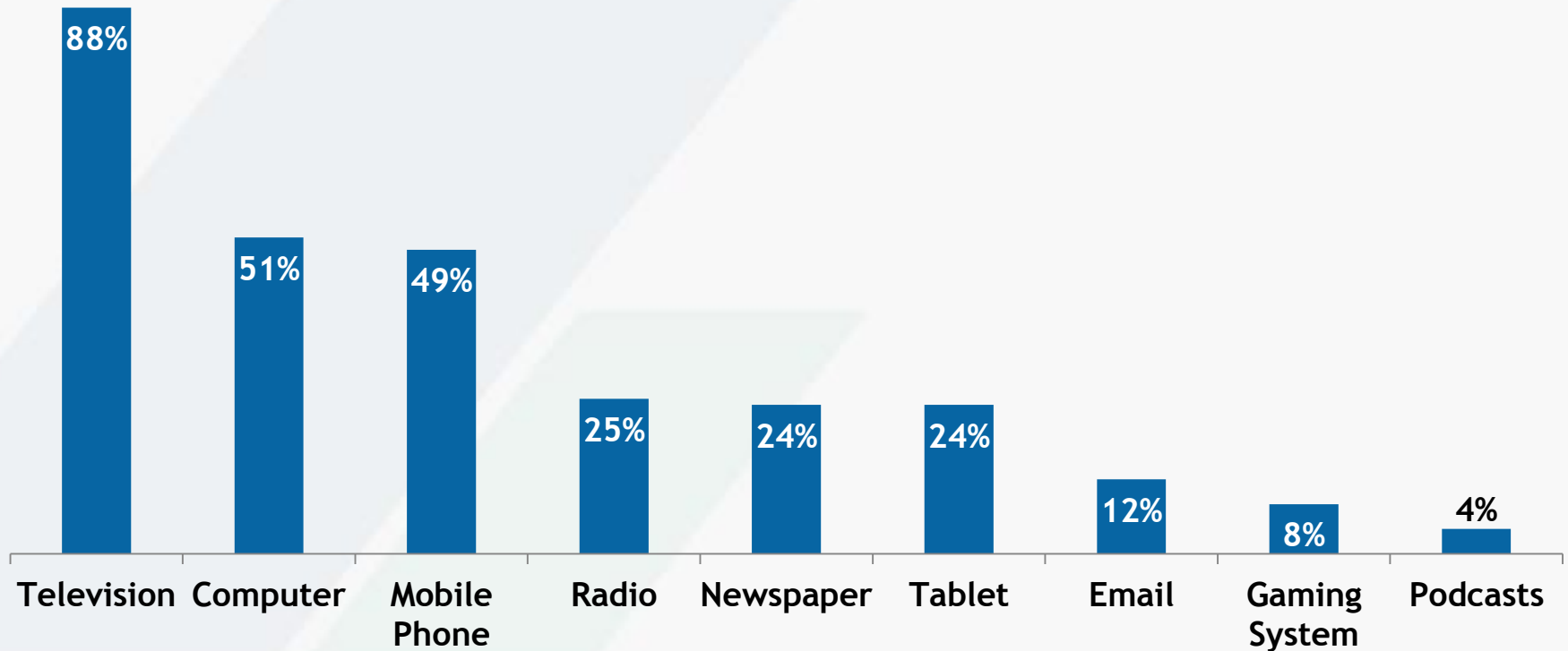
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Source: #SCORE 2016 Sports Fan Behavior Study 2016; Center for the Digital Future at Annenberg/ThePostGame.

It's No Surprise That Television Dominates Sports, But Half The Population Also Gets Content From Alternate Devices

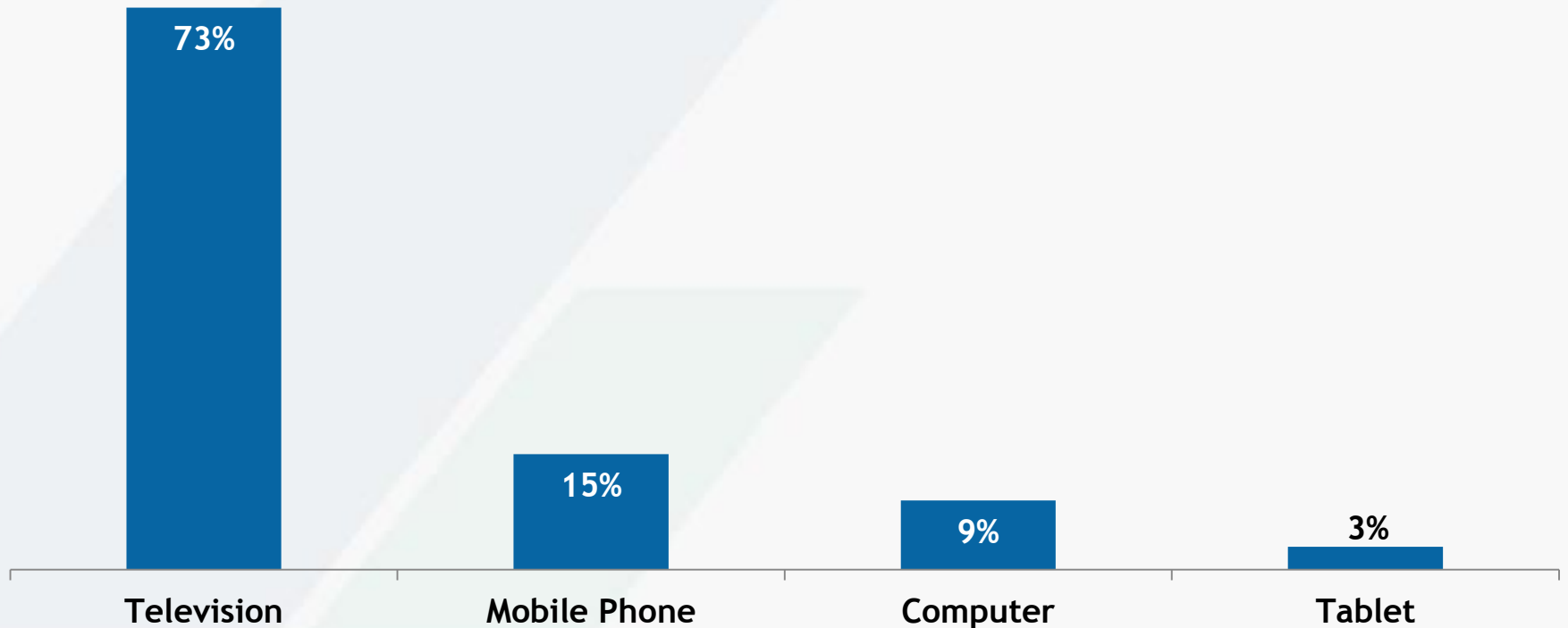
How Do You Access Sports?



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But Still, Television Is The Overwhelming Preference For People To Consume Sports Video Content

How Do You Prefer To Receive Sports Video Content?



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Source: #SCORE 2016 Sports Fan Behavior Study 2016; Center for the Digital Future at Annenberg/ThePostGame.

“Wide World of Sports”: The Omnichannel Ecosystem

Sports Ecosystem

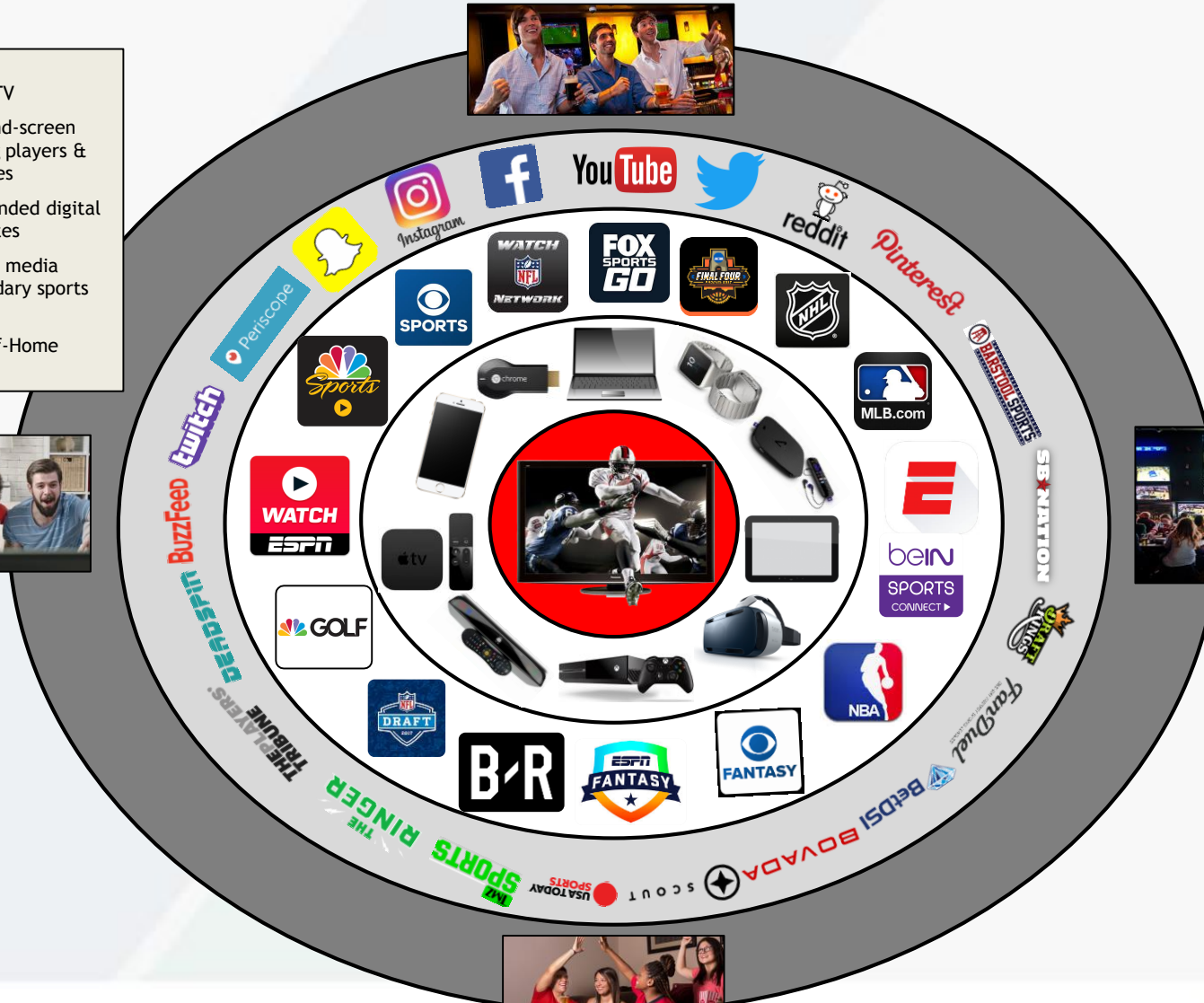
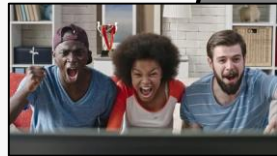
Center Ring: Live TV

Second Ring: second-screen viewing, streaming players & time-shifted devices

Third Ring: TV-branded digital platforms & websites

Fourth Ring: social media platforms & secondary sports websites

Outer Ring: Out-Of-Home Viewing



NO DAYS OFF!



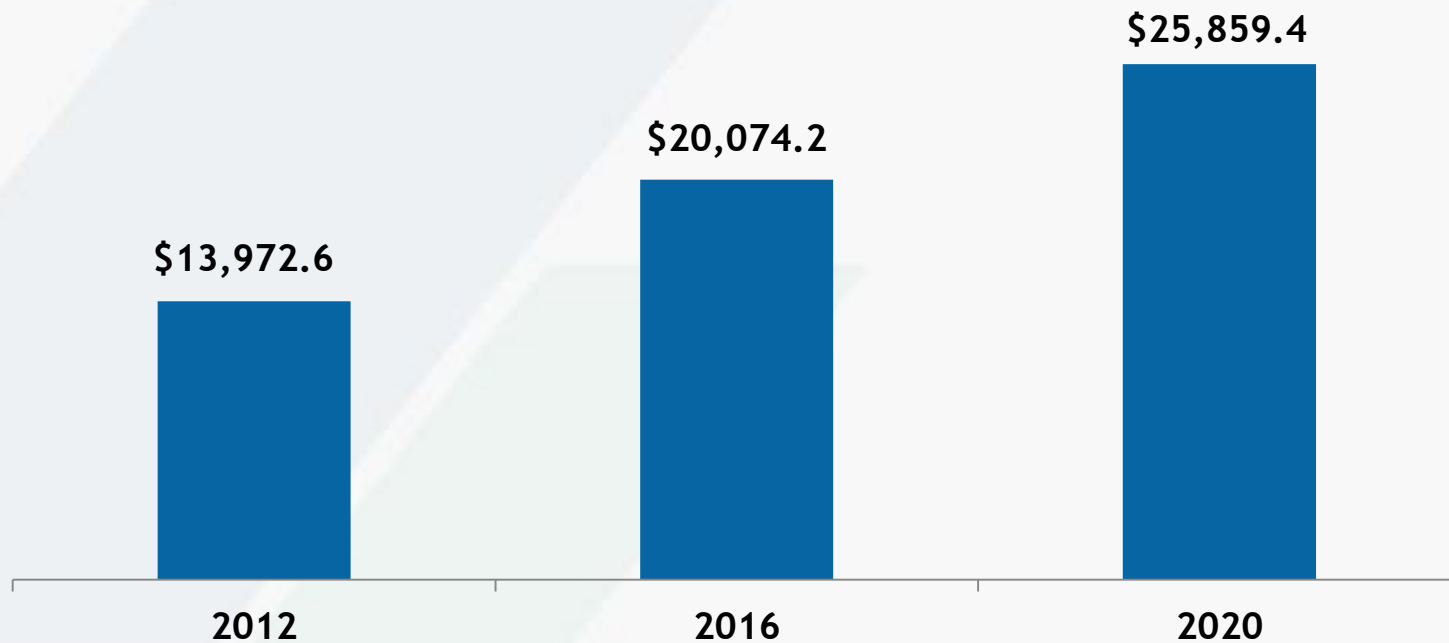
TV Is The Heart Of The Sports Ecosystem

TV Networks Spent Over \$20 Billion On Sports Programming In 2016; A \$6 Billion Increase Over The Last Four Years

Programmers are projected to spend almost another \$6 billion more on sports in the next four years in order to deliver consumers even more live sporting events.

Sports Programming Costs Trend

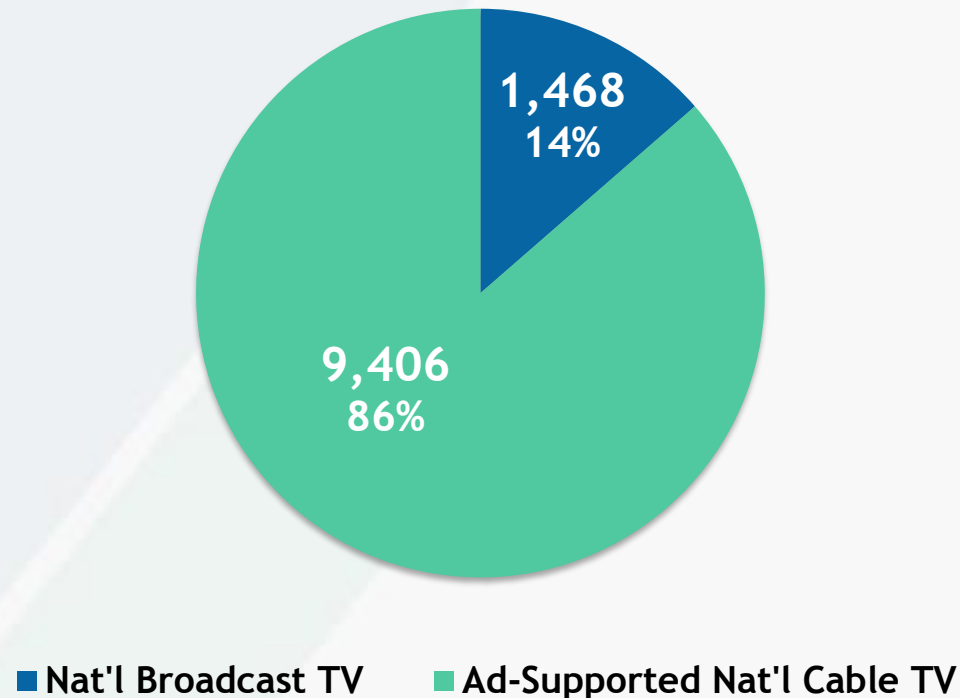
(millions)



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Almost 11,000 Live Sporting Events Are Shown On National TV Annually, With 86% Of Them Airing On Ad-Supported Cable

Live Sporting Events in 2016 Broadcast TV vs. Cable TV



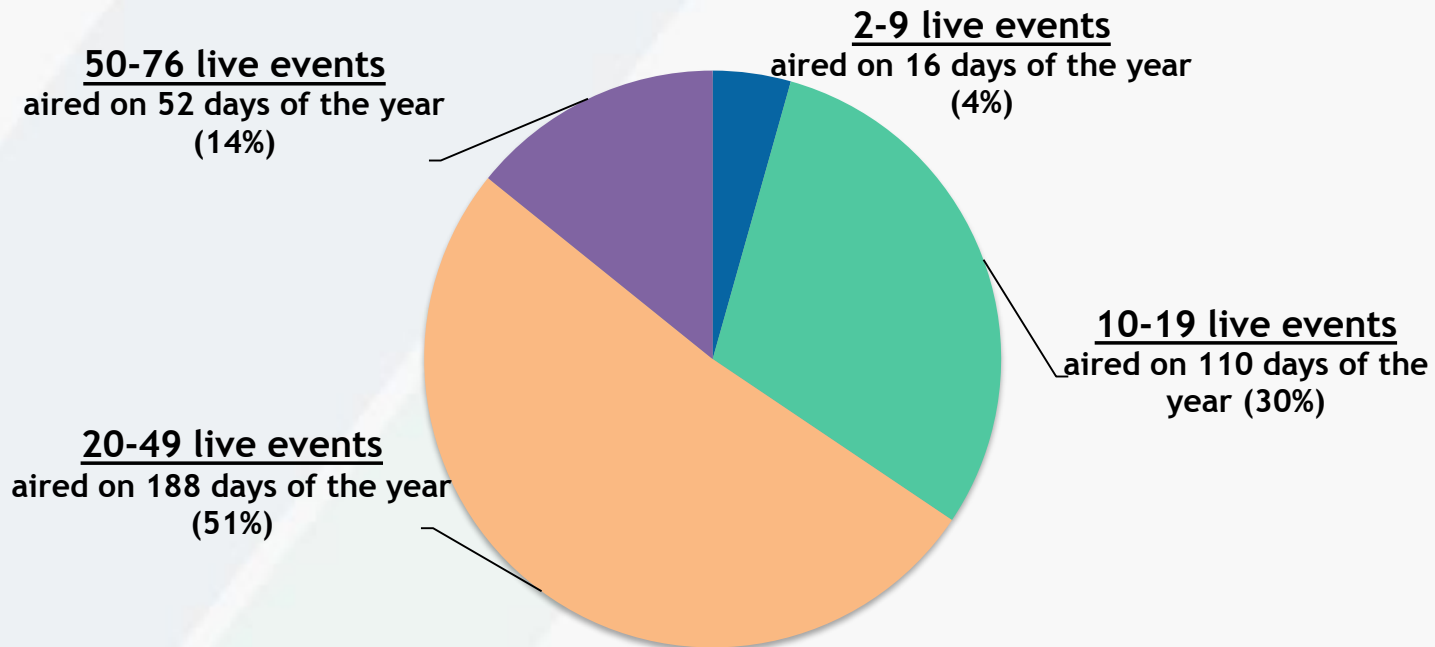
NO DAYS OFF!

Source: Nielsen NPower, Total Day, live originals/premieres only, January 1, 2016 - December 31, 2016; excludes Regional Sports Networks and local broadcast airings.

No Days Off: There Were At Least Two Live Sporting Events Airing Every Single Day of The Year On National TV In 2016

A live sporting event aired on ad-supported cable TV every day (366 days) in 2016 while national broadcast TV aired live sports on 221 days.

of Live National TV Sporting Events Aired Daily



How to read: In 2016, 16 days featured between 2-9 live sporting events airing on national TV.

NO DAYS OFF!

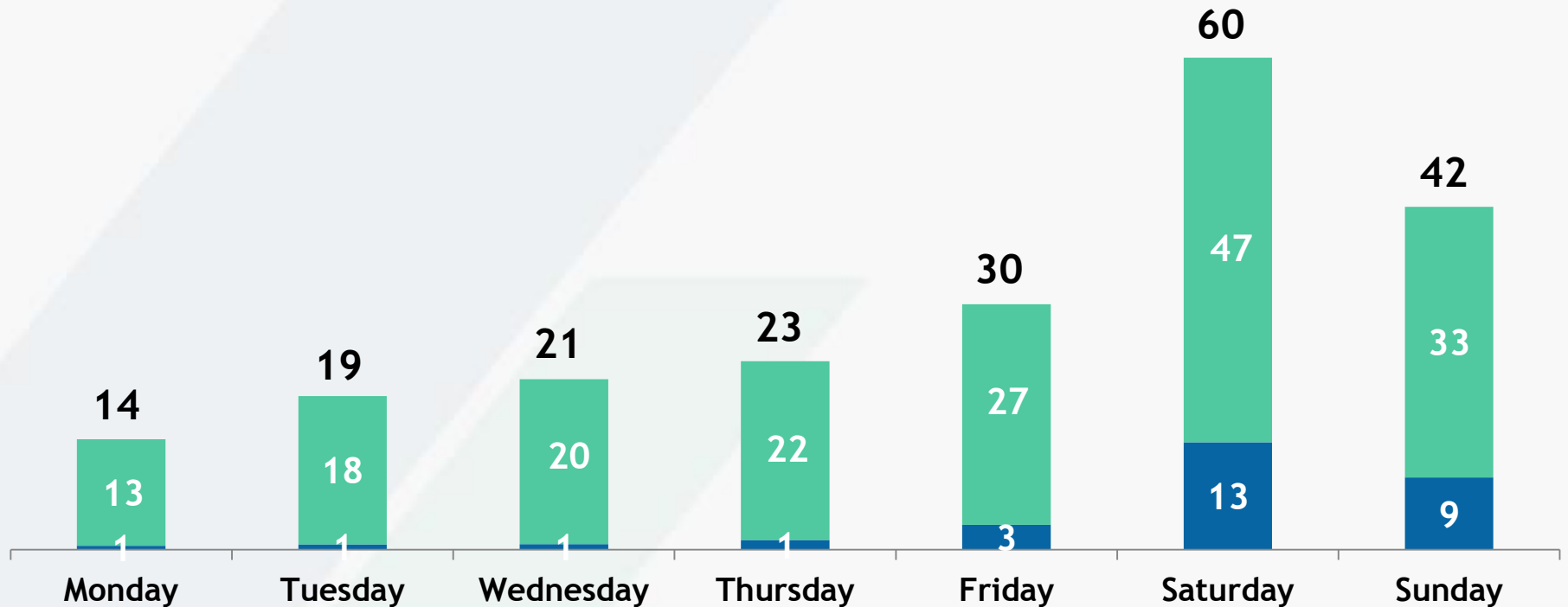
Source: Nielsen NPower, Total Day, live originals/premieres only, January 1, 2016 - December 31, 2016; includes Spanish language networks; excludes Regional Sports Networks and local broadcast airings.

In Fact, On Average There Are At Least Ten Live Sporting Events Airing On National TV Each Day Throughout The Year

Average # of Live Sporting Events Each Day

2016

■ Nat'l Broadcast TV ■ Ad-Supported Nat'l Cable TV



NO DAYS OFF!

Source: Nielsen NPower, Total Day, live originals/premieres only, January 1, 2016 - December 31, 2016; excludes Regional Sports Networks and local broadcast airings.

Each Day Is Anchored By Several Signature Sports Series Airing On National TV Throughout The Year

Sampling of Signature Sports Series

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
     	     	     	     	     	       	        

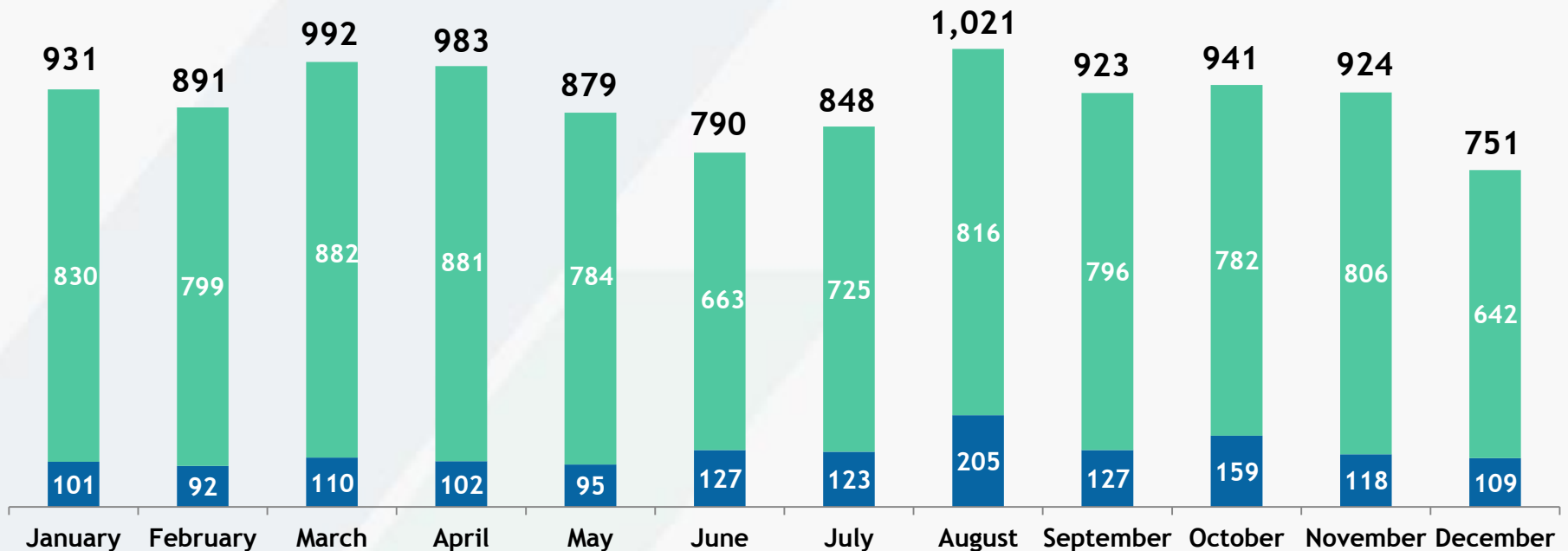
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Live Sports On National TV Is Rather Consistent While Having Slight Peaks In Spring & Fall Months

of Live Sporting Events Per Month

2016

■ Nat'l Broadcast TV ■ Ad-Supported Nat'l Cable TV



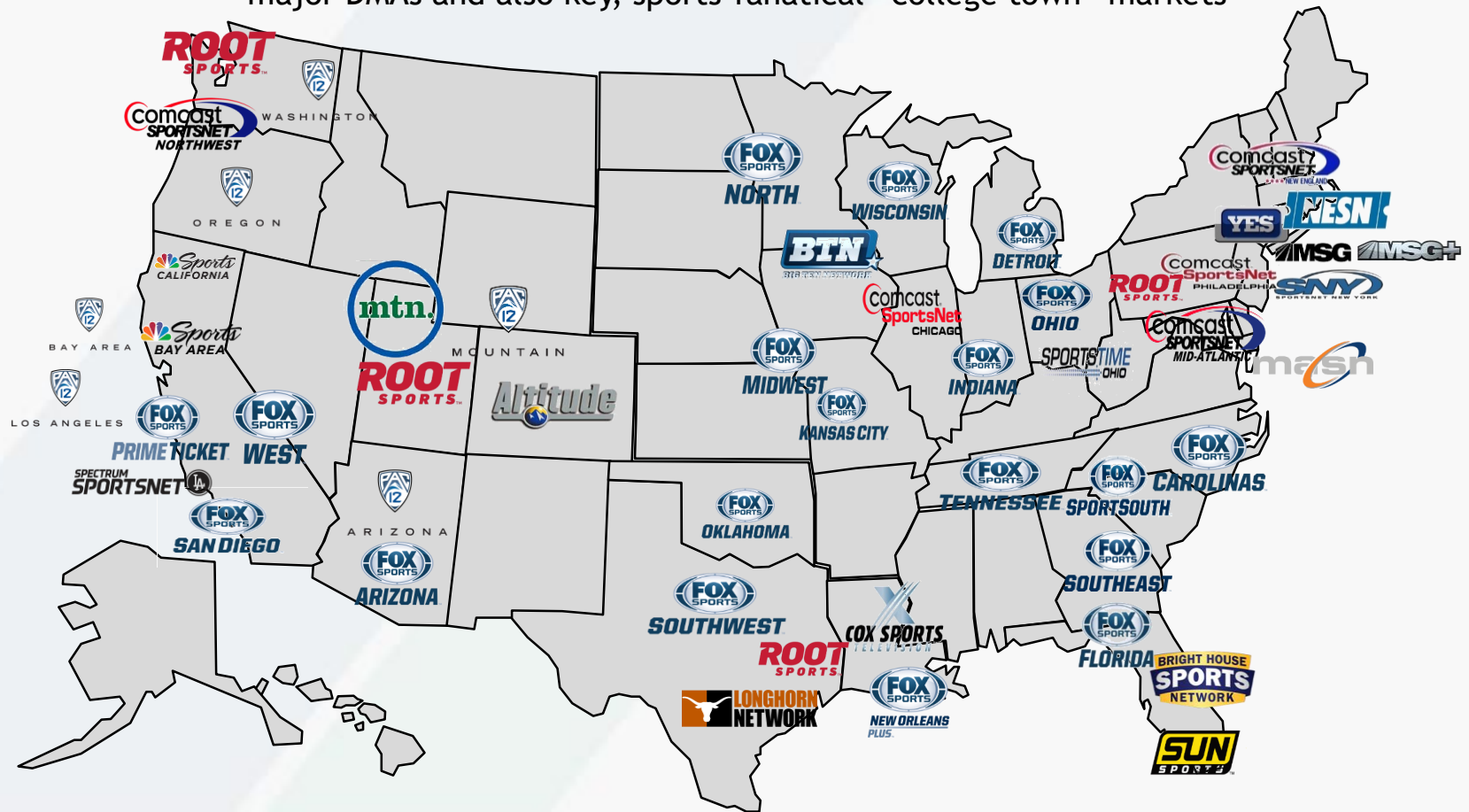
Note: Summer is dominated by the MLB, a sport that has the vast majority of its games airing on RSNs which are not reflected in the above chart.

NO DAYS OFF!

Source: Nielsen NPower, Total Day, live originals/premieres only, January 1, 2016 - December 31, 2016; includes Olympics and excludes Regional Sports Networks and local broadcast airings.

Complementing National Sports Are RSNs Which Air In-Market Sports & Provide Comprehensive Coverage Of Local Teams

RSNs, which consist of live professional & collegiate sports broadcast and ancillary programming, cover all major DMAs and also key, sports-fanatical “college town” markets



NO DAYS OFF!

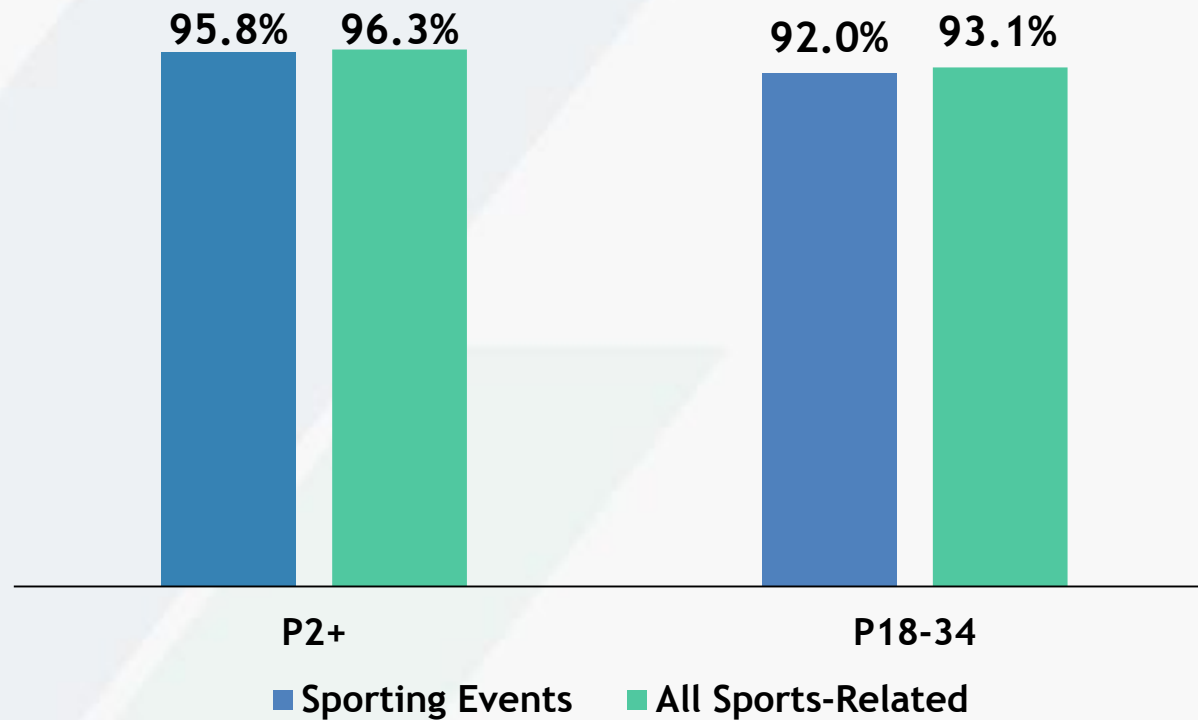


Sports TV's Current Winning Streak

Sports Are Ubiquitous Among The TV Viewer Given The Daily Availability Of Live Events & Related Programming

Annual Cume National Sports TV Reach (Live)

CY 2016



NO DAYS OFF!

Source: Nielsen NPower R&F Program Report, Total Day, Live, P2+ & P18-34, ad-supported cable TV + broadcast TV, January 1st - December 31st 2016; excludes Regional Sports Networks and local broadcast airings. Sports-related programming includes live sports, sports news, sports commentary, etc.

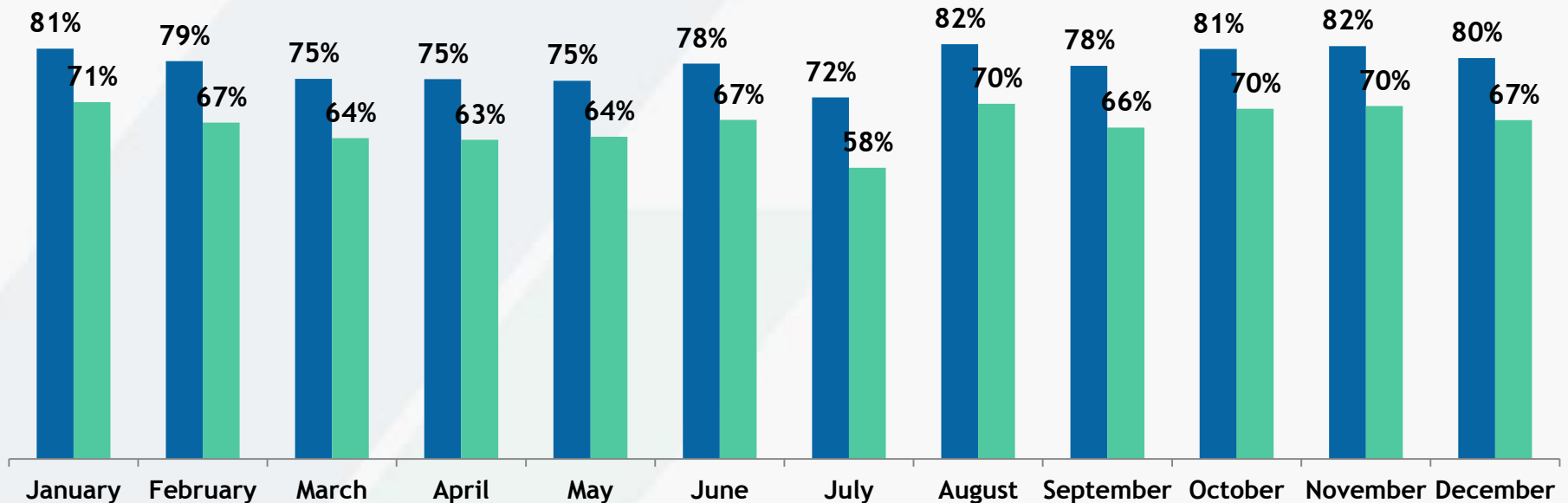
National Sports TV Monthly Reach Is Fairly Consistent But Has A Slight Increase During The Football Season

On average, almost 80% of P2+ watch sports-related TV programming live each month

Monthly Cume National Sports-Related Programming Live TV Reach

CY 2016

■ P2+ ■ P18-34



Note: Summer is dominated by the MLB, a sport that has the vast majority of its games airing on RSNs which are not reflected in the above chart.

NO DAYS OFF!

Source: Nielsen NPower R&F Program Report, Total Day, Live, P2+ & P18-34, ad-supported cable TV + broadcast TV, based on calendar months; includes Olympics and excludes Regional Sports Networks and local broadcast airings. Sports-related programming includes live sports, sports news, sports commentary, etc.

Sports Also Delivers Significant Simultaneous Reach For Many Events Throughout The Year

In the last year, there were 20 live sporting events that delivered an average audience of over 10 million TV viewers, spanning across seven different sports

Date	Sport	Event	Network	Avg # of U.S. TV Viewers (Millions)
2/5/17	NFL	Superbowl LI: New England Patriots vs. Atlanta Falcons	FOX	111.3
1/15/17	NFL	NFC Divisional: Green Bay Packers vs. Dallas Cowboys	FOX	48.5
1/22/17	NFL	AFC Championship: Pittsburgh Steelers vs. New England Patriots	CBS	48.0
1/22/17	NFL	NFC Championship: Green Bay Packers vs. Atlanta Falcons	FOX	46.3
1/8/17	NFL	NFC Wild Card: New York Giants vs. Green Bay Packers	FOX	39.3
11/24/16	NFL	Thanksgiving Classic: Washington Redskins vs. Dallas Cowboys	FOX	35.1
9/8/16	NFL	Thursday Night Football: Denver Broncos vs. Carolina Panthers	NBC	25.2
1/9/17	NCAA FB	CFP National Championship: Alabama vs. Clemson	ESPN	24.4
11/2/16	MLB	World Series: Cleveland Indians vs. Chicago Cubs	FOX	23.4
12/25/16	NFL	NFL Christmas Day: Denver Broncos vs. Kansas City Chiefs	NBC	21.4
6/2/16	NBA	NBA Finals: Cleveland Cavaliers vs. Golden State Warriors	ABC	20.2
12/31/16	NCAA FB	Peach Bowl (SemiFinal): Washington vs. Alabama	ESPN, ESPN2	19.4
12/31/16	NCAA FB	Fiesta Bowl (SemiFinal): OSU vs. Clemson	ESPN, ESPN2	19.3
4/4/16	NCAA BKB	Championship Game: Villanova vs. North Carolina	TBS, TNT, TRUTV	15.8
1/2/17	NCAA FB	Rose Bowl: USC vs. Penn State	ESPN	15.7
4/10/16	Golf	The Masters: 2016	CBS	12.4
12/30/16	NCAA FB	Orange Bowl: Michigan vs. FSU	ESPN	11.5
2/21/16	NASCAR	Daytona 500	FOX	11.4
4/2/16	NCAA BKB	March Madness Final Four Matchups	TBS, TNT, TRUTV	10.7
12/12/16	NBA	NBA Christmas Day: Cleveland Cavaliers vs. Golden State Warriors	ABC	10.1

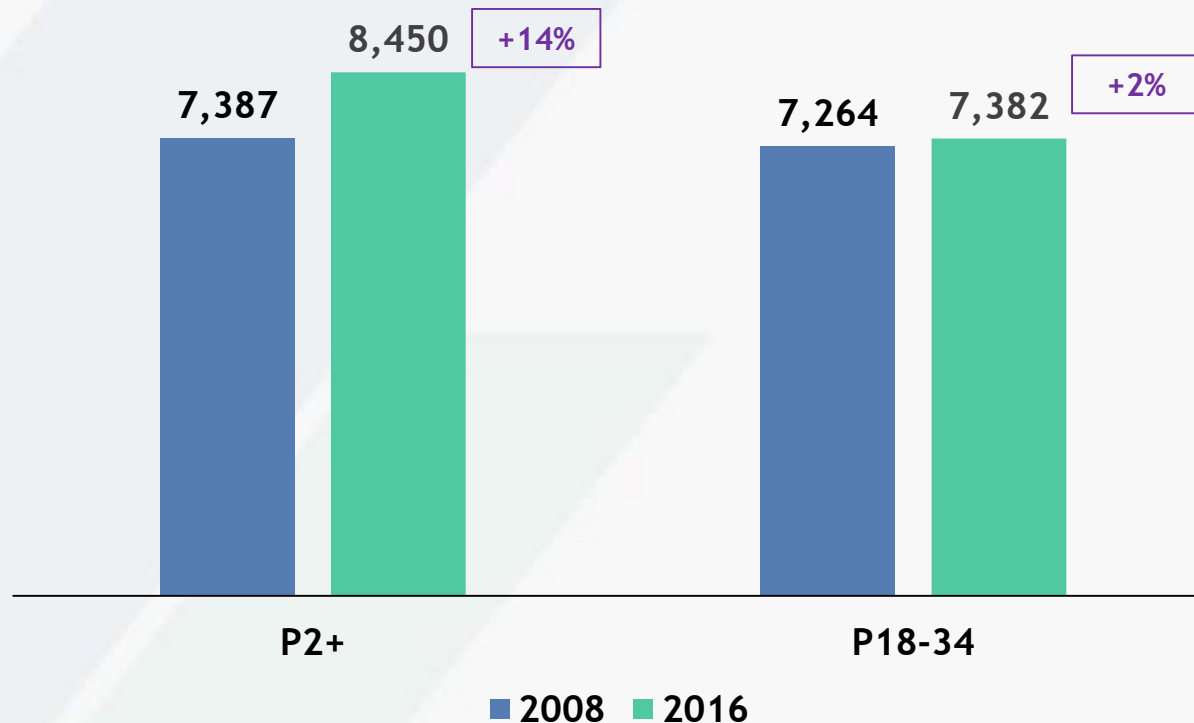
NO DAYS OFF!

Source: Nielsen Year In Sports Media Report 2016, based on 2/21/16 - 2/5/17 time period. For the Masters, the figure is based on the final day of the tournament (Sunday).

Average Time Spent Watching TV Sports Has *Increased* For The Total Population & Millennials Over The Last Eight Years

Sports-Related National TV Programming: Average Annual Minutes Viewed Comparison

CY 2008 vs. CY 2016



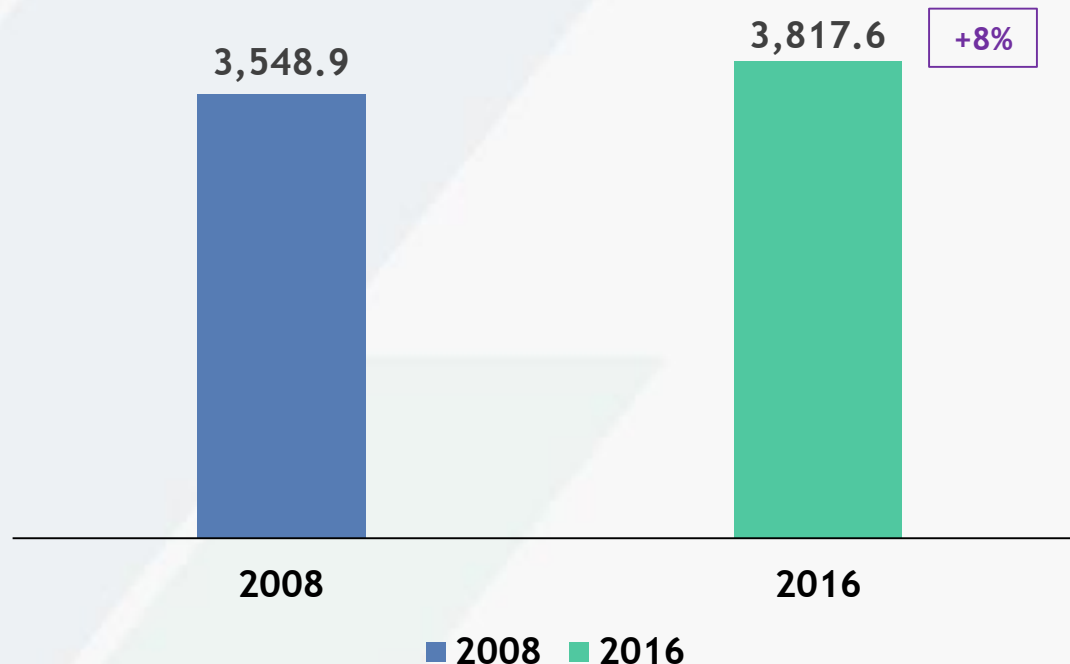
NO DAYS OFF!

Source: Nielsen NPower R&F Program Report, Total Day, Live+7, P2+ & P18-34, ad-supported cable TV + broadcast TV, based on calendar year; excludes Regional Sports Networks and local broadcast airings. Sports-related programming includes live sports, sports news, sports commentary, etc. Comparison based on years with Summer Olympics.

There Has Been An 8% Increase In The Total Sports Audience During *Any Given Minute* Over The Last Eight Years

Sports-Related National TV Programming: Average P2+ Audience (000)

CY 2008 vs. CY 2016



Note: "Average Audience" based on the average audience per minute for sports programming during the full calendar year (total day).

NO DAYS OFF!

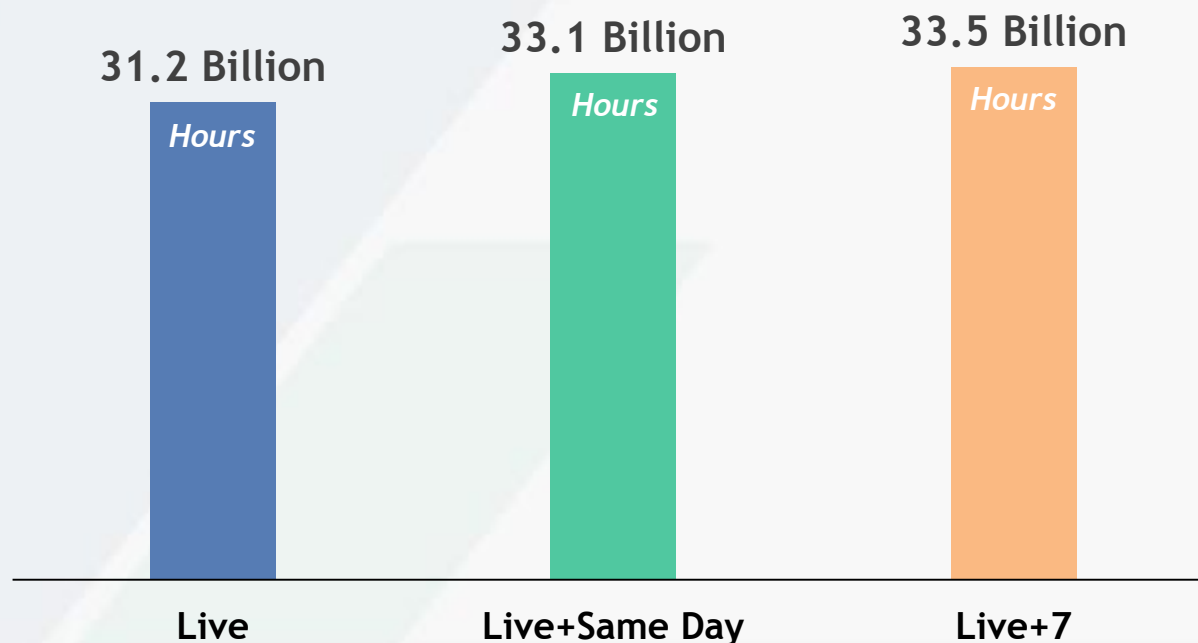
Source: VAB analysis based on data from Nielsen NPower R&F Program Report, Total Day, Live+7, P2+, ad-supported cable TV + broadcast TV, based on calendar year; excludes Regional Sports Networks and local broadcast airings. Sports-related programming includes live sports, sports news, sports commentary, etc. Comparison based on years with Summer Olympics.

Over **33 Billion Hours** Of Sports-Related Programming Were Collectively Viewed On Ad-Supported National TV In 2016

93% of total viewing of sports-related programming was done live

Sports-Related National TV Programming: Total Cume P2+ Hours Viewed

CY 2016



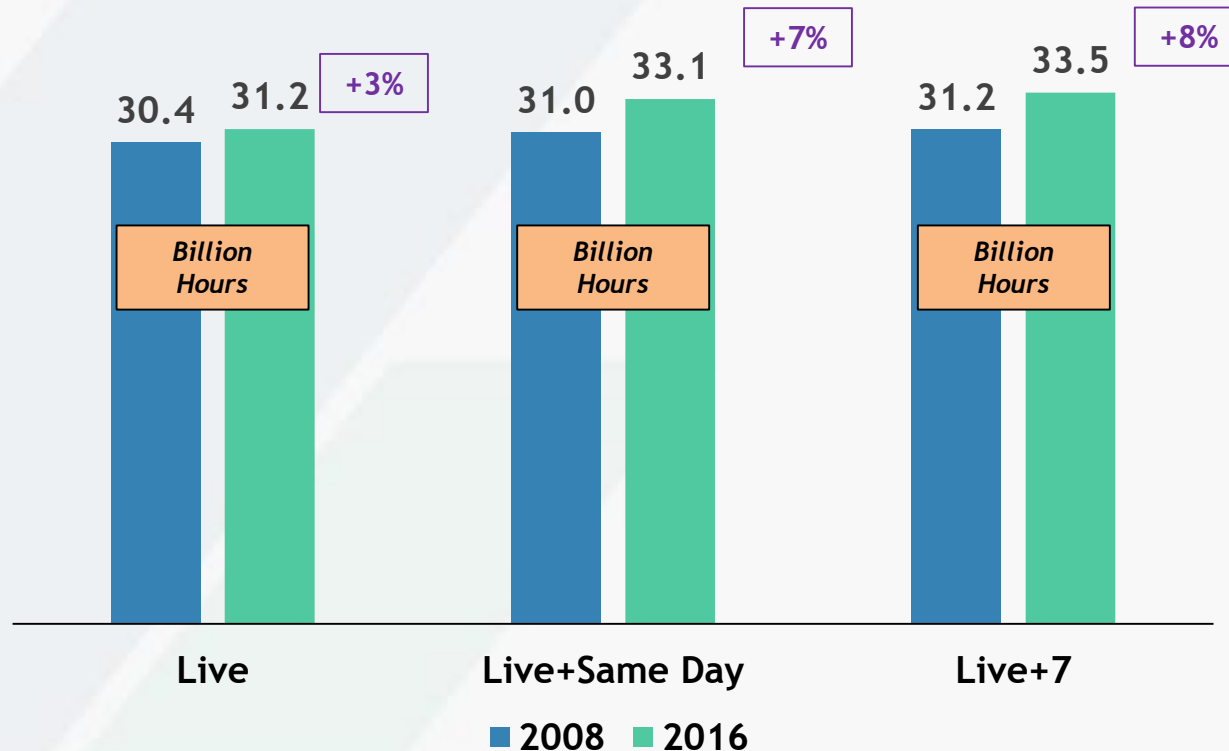
NO DAYS OFF!

Source: Nielsen NPower R&F Program Report, Total Day, P2+, ad-supported cable TV + broadcast TV, based on calendar year; excludes Regional Sports Networks and local broadcast airings. Sports-related programming includes live sports, sports news, sports commentary, etc.

Total TV Sports Viewing Has Also Collectively *Increased* Across Each Major Stream Over The Last Eight Years

Sports-Related National TV Programming: Total Cume P2+ Hours Viewed Comparison

2008 vs. 2016



NO DAYS OFF!

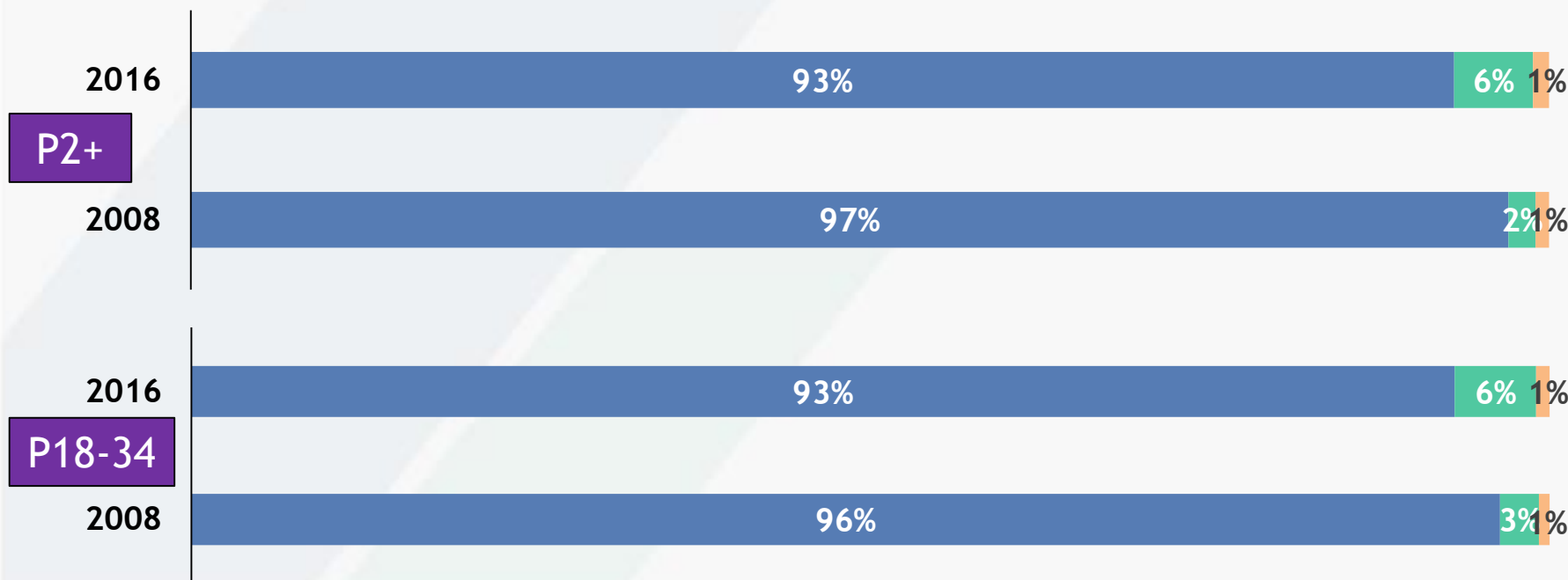
Source: Nielsen NPower R&F Program Report, Total Day, P2, ad-supported cable TV + broadcast TV, based on calendar year; excludes Regional Sports Networks and local broadcast airings. Sports-related programming includes live sports, sports news, sports commentary, etc.

Even With The Increase In DVR Penetration, Sports Remains Almost Exclusively A “Live” Or “Near Live” Viewing Experience

Sports-Related National TV Programming: Viewership By Stream

% of Total Viewing Hours

■ Live ■ Live+Same Day ■ Live+7



NO DAYS OFF!

Source: Nielsen NPower R&F Program Report, Total Day, P2+ & P18-34, ad-supported cable TV + broadcast TV, based on calendar year; excludes Regional Sports Networks and local broadcast airings. Sports-related programming includes live sports, sports news, sports commentary, etc.

Along With The Increase In Average Audience & Hours Viewed Has Come Many Ratings Victories For Big Sporting Events

2016 MLS Cup is Most-Watched Championship Game in League History

UFC Fight Night: McGregor vs. Siver prove to be a ratings hit on Fox Sports 1

Soccer's Euro 2016: Big Ratings, Strategic Losses

TV Ratings: Viewership of NCAA Championship Grows 21% Over 2016

CONOR MCGREGOR LEADS UFC AND FOX SPORTS 1 TO RECORD TV RATINGS

World Series TV ratings: Epic Game 7 was off the charts

MLS games on Sunday garner highest TV ratings in 12 years

World Series Ratings Roundup: Game 7 Is Most Watched Baseball Game of Any Kind Since 1991

Ratings Roundup: March Madness Up 10% in Viewership; WBC Is Home Run for MLB, ESPN Deportes

Atlanta United draws 2nd-highest TV rating on FS1

For the NHL, a record year for ratings
NBCSN posts best season and top regular season on cable in decades

NFL Playoffs: Packers-Cowboys thriller sets TV ratings record for divisional round

Ryder Cup Chips In For Golf Channel's Most-Watched Day Ever

Successful Copa America 2016 Smashes Records

2017 NCAA TOURNAMENT IS MOST VIEWED IN 24 YEARS, RATINGS UP 10 PERCENT FROM 2016

Baseball Is Dying? TV Ratings For 2016 World Series Through The Roof

Cubs-Indians 2016 World Series: TV ratings highest since 2009 after two games

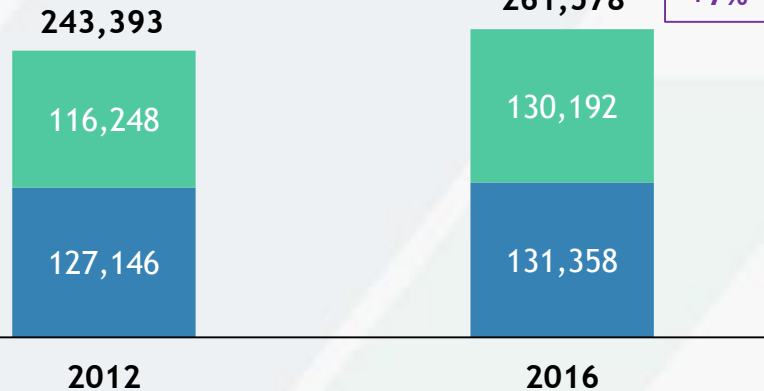
Commercial Inventory Available Within Sports Programming Increased 7% In 2016 vs. Four Years Ago

National Sports TV Genre P2+ GRP Comparison

CY 2012 vs. CY 2016

Live Sporting Events

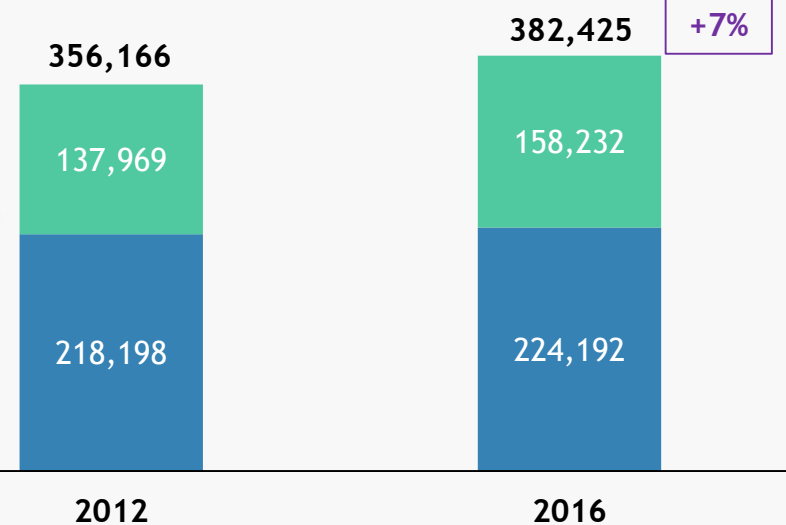
■ Ad-Supported Cable TV ■ Broadcast TV



All Sports-Related Programming

(including Live Events)

■ Ad-Supported Cable TV ■ Broadcast TV



NO DAYS OFF!

Source: Nielsen Ad Intel, Total Day, Live+7. Activity reflects calendar year comparison for 2012 vs. 2016. GRPs are equitized. Data includes Spanish language networks. Sports-related programming includes live sports, sports news, sports commentary, etc. Olympics are excluded.


A Majority Of The Growing Commercial Inventory For Major Sports, Besides NFL, Lives on Ad-Supported Cable TV

National GRPs On Ad-Supported Cable TV By Sports Genre: A Snapshot

Sport	Live Sporting Events		All Sports-Related Programming	
	2016	2016 vs 2012	2016	2016 vs 2012
	Cable TV GRP % Share	Cable TV GRP Increase	Cable TV GRP % Share	Cable TV GRP Increase
College Basketball	70%	30%	69%	30%
College Football	56%	21%	58%	21%
Golf	60%	-8%	62%	-6%
Pro Baseball	63%	24%	70%	21%
Pro Basketball	72%	-17%	74%	-14%
Pro Football	19%	10%	29%	3%
Pro Hockey	70%	29%	71%	32%
Soccer	54%	99%	57%	91%
Tennis	91%	13%	89%	12%

NO DAYS OFF!

Source: Nielsen Ad Intel, Total Day, Live+7. Activity reflects calendar year comparison for 2012 vs. 2016. GRPs are equitized. Data includes Spanish language networks. Sports-related programming includes live sports, sports news, sports commentary, etc. Olympics are excluded.

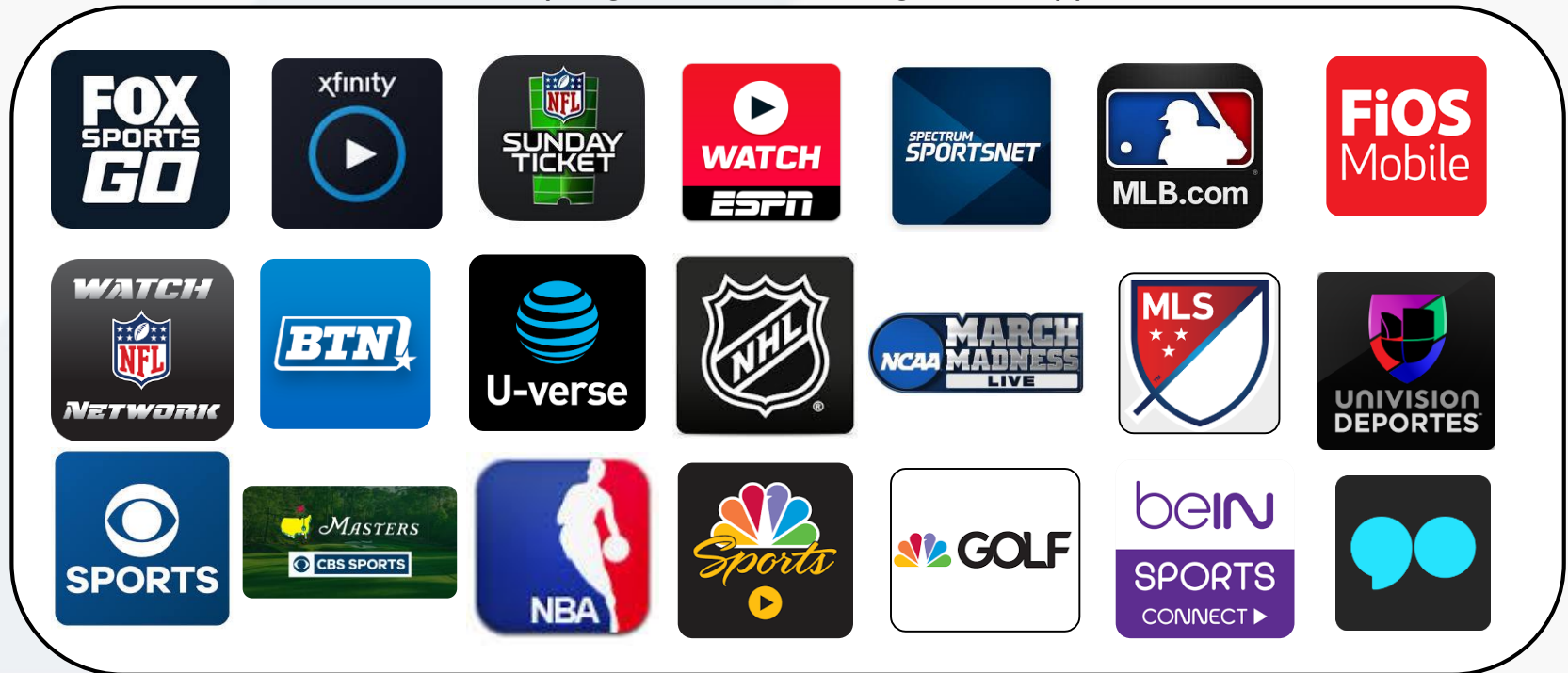


Complementary Content Through Secondary Screens

TV Brands Extend Their Reach & Engagement Through Live Streaming Which Allows Additional Sports Viewing Everywhere

Live event streaming from sports programmers & providers gives flexibility to cable subscribers, allowing them to view content across devices.

Sampling of Live Streaming Mobile Apps



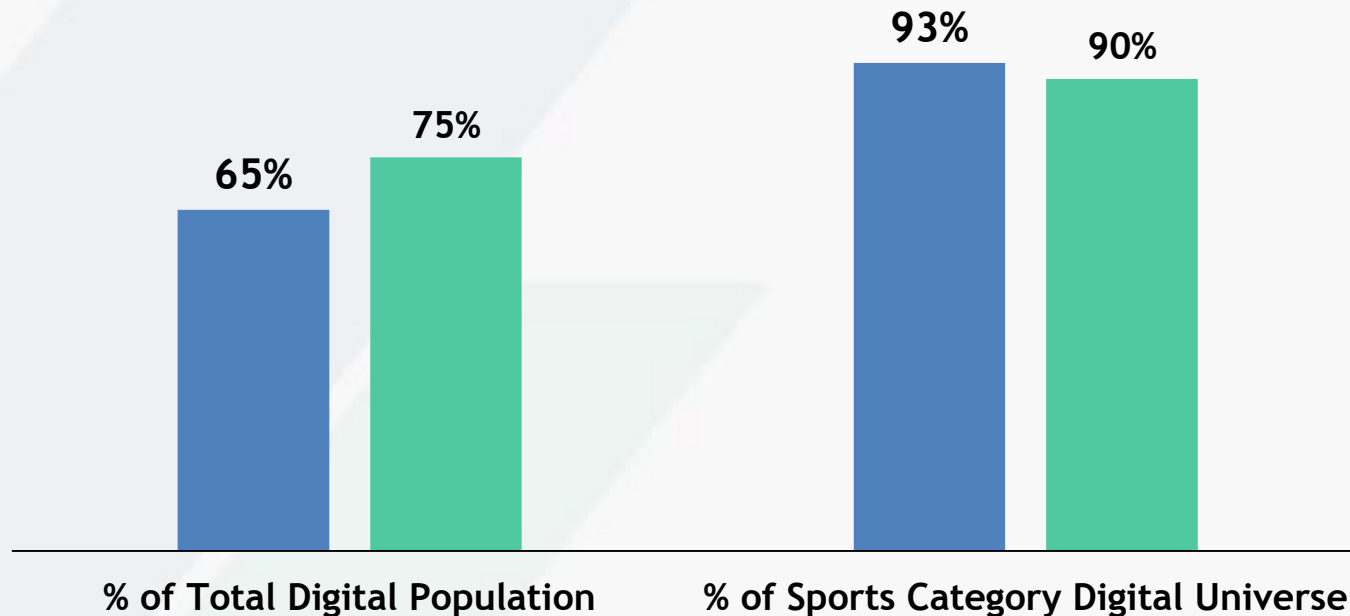
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TV-Branded Sports Platforms Reach A Majority Of The Digital Population & Almost Everyone Within The Online Sports Universe

TV-Branded Sports Platform Cume Unique Visitors Coverage

Dec '16

■ P2+ ■ P18-34



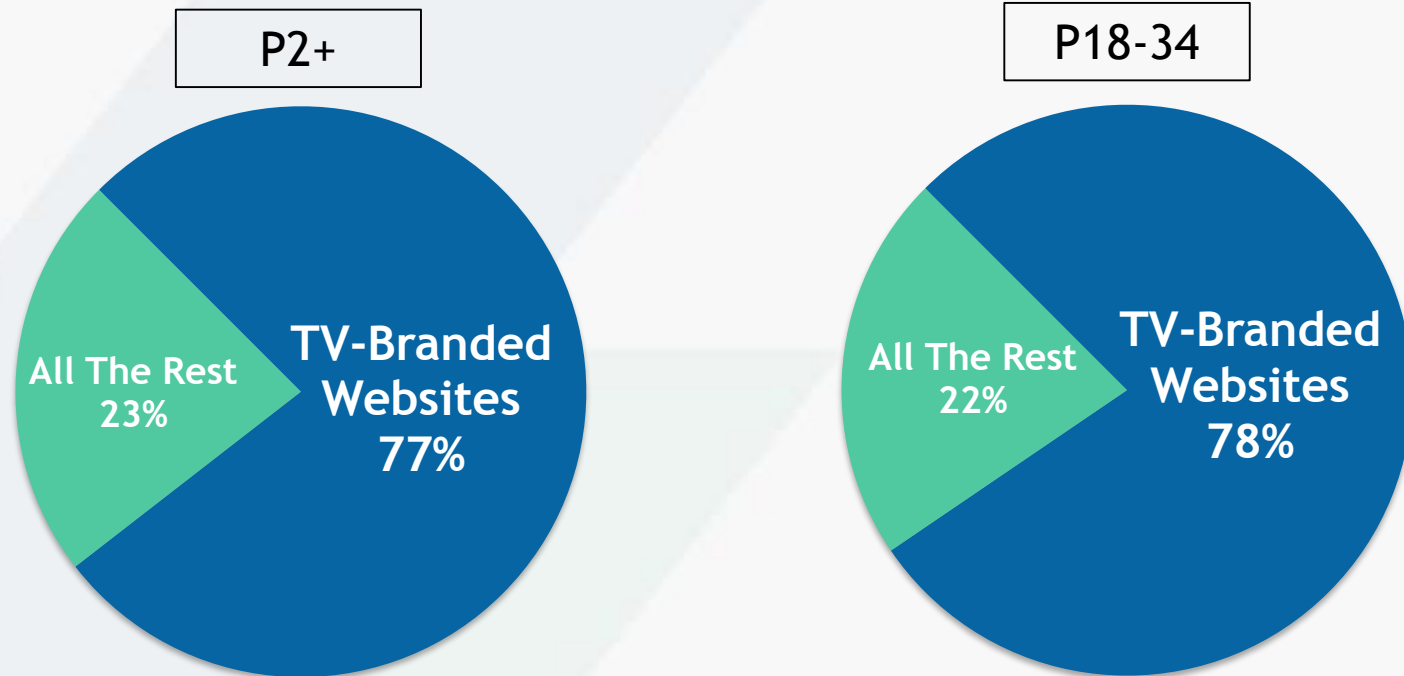
NO DAYS OFF!

Source: comScore Audience Duplication; multiplatform (web+mobile), December 2016, unduplicated unique visitors based on a custom created Sports TV Branded Website subcategory which includes digital platforms such as ESPN.com, Fox Sports, CBS Sports & NBC Sports. comScore MediaMetrix, multiplatform media trend data, December 2016, total digital population & sports category.

A Vast Majority Of Time Spent Online With Sports Content Is Through TV-Branded Digital Platforms

Sports Category: % of Total Minutes Viewed Online

2016



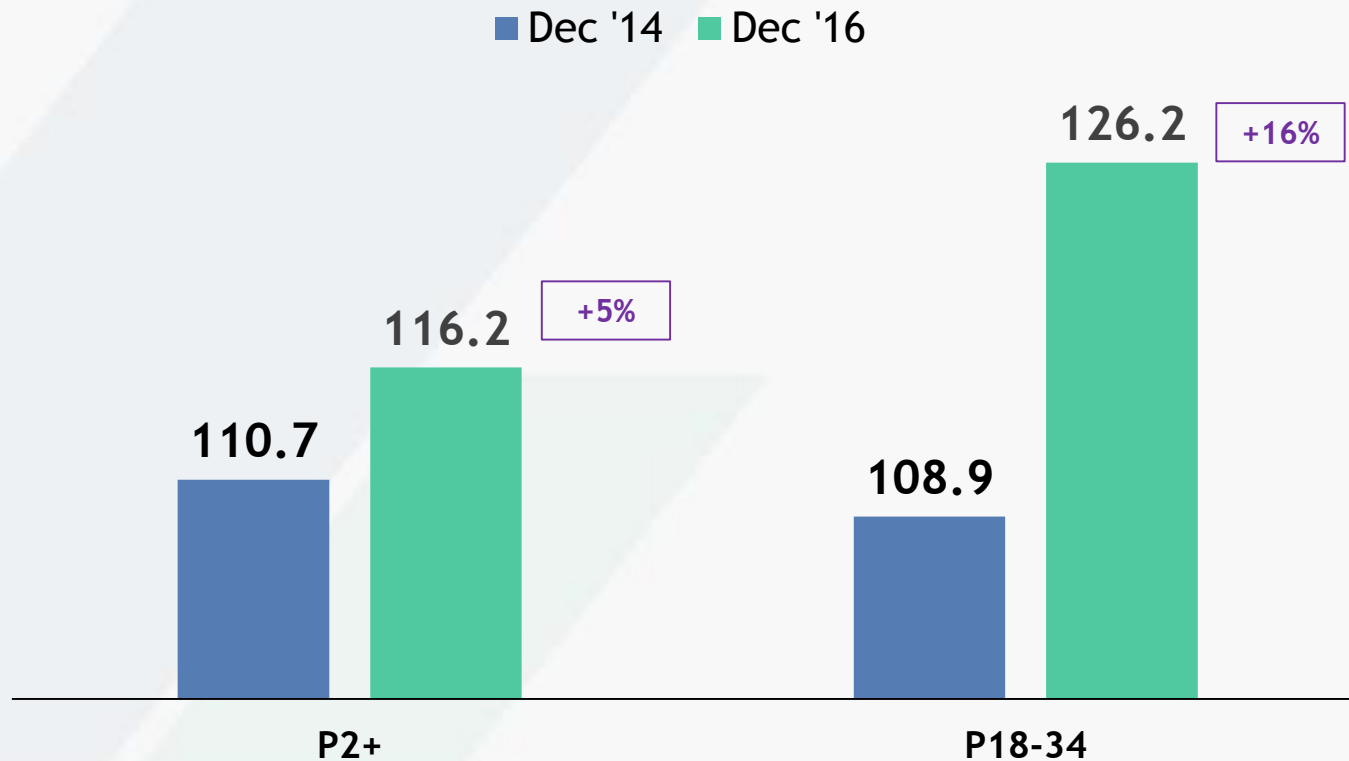
Note: "All The Rest" reflects non-premium TV-related websites like USA Today Sports, SB Nation, Scout.com, Reddit Sports, Deadspin.com, Big Lead Sports, etc

NO DAYS OFF!

Source: comScore MediaMetrix, multiplatform media trend data, January-December 2016; comScore-defined sports category vs. custom created Sports TV Branded Website subcategory which includes digital platforms such as ESPN.com, Fox Sports, CBS Sports & NBC Sports.

Millennials' Time Spent On Sports TV-Branded Digital Platforms Have Increased By Double Digits Over The Last Two Years

Sports TV-Branded Digital Platforms: Average Monthly Minutes Spent Per Visitor

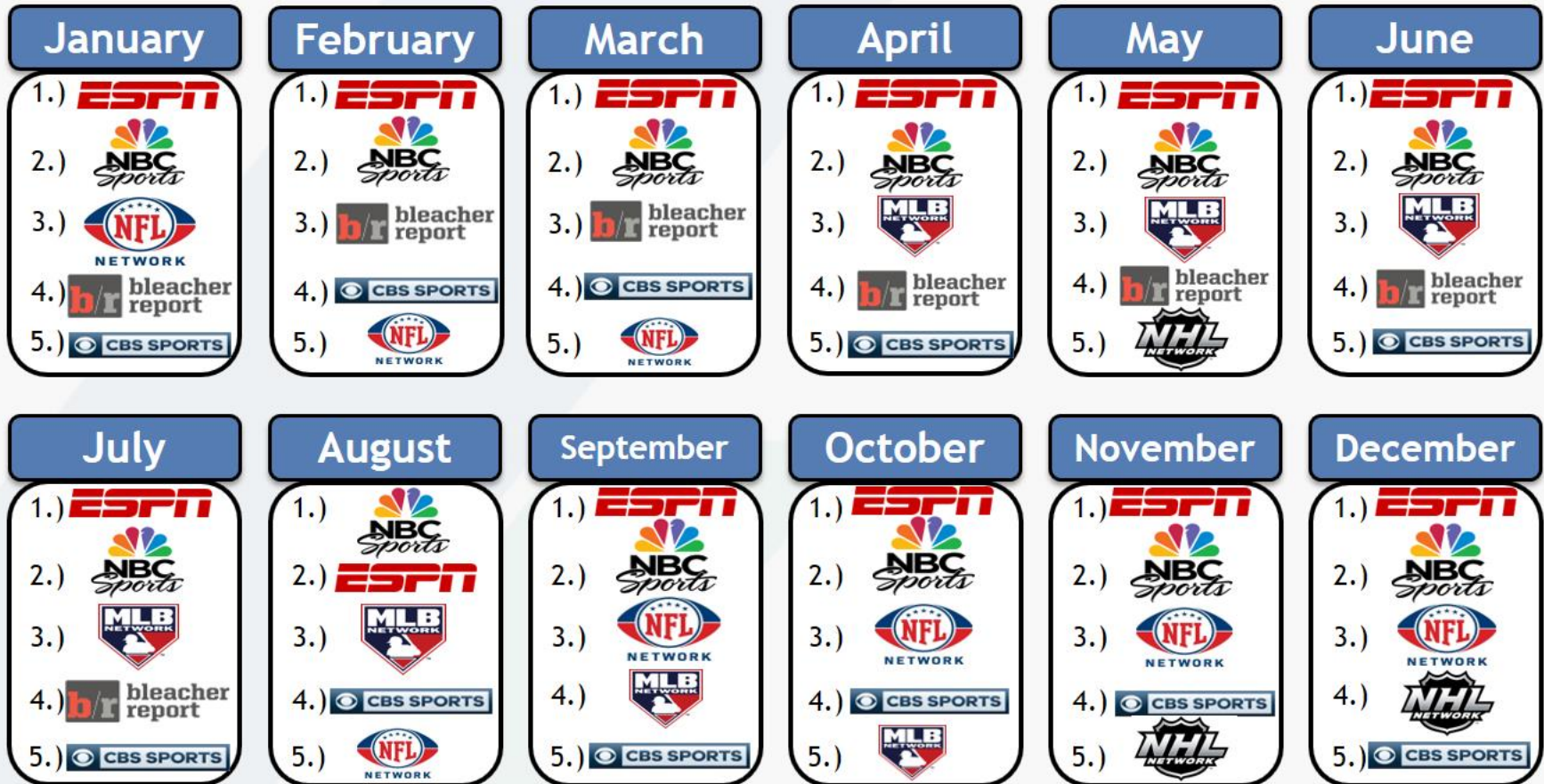


NO DAYS OFF!

Source: ComScore Audience Duplication; multiplatform (web+mobile), unduplicated Avg Mins per Visitor based on a custom created Sports TV Branded Website subcategory which includes digital platforms such as ESPN.com, Fox Sports, CBS Sports & NBC Sports.

TV-Related Brands Make Up The Top 5 Most Trafficked Digital Platforms In The Sports Category Throughout The Year

Top 5 Sports Digital Platform Rank By Total Minutes Viewed (P2+)

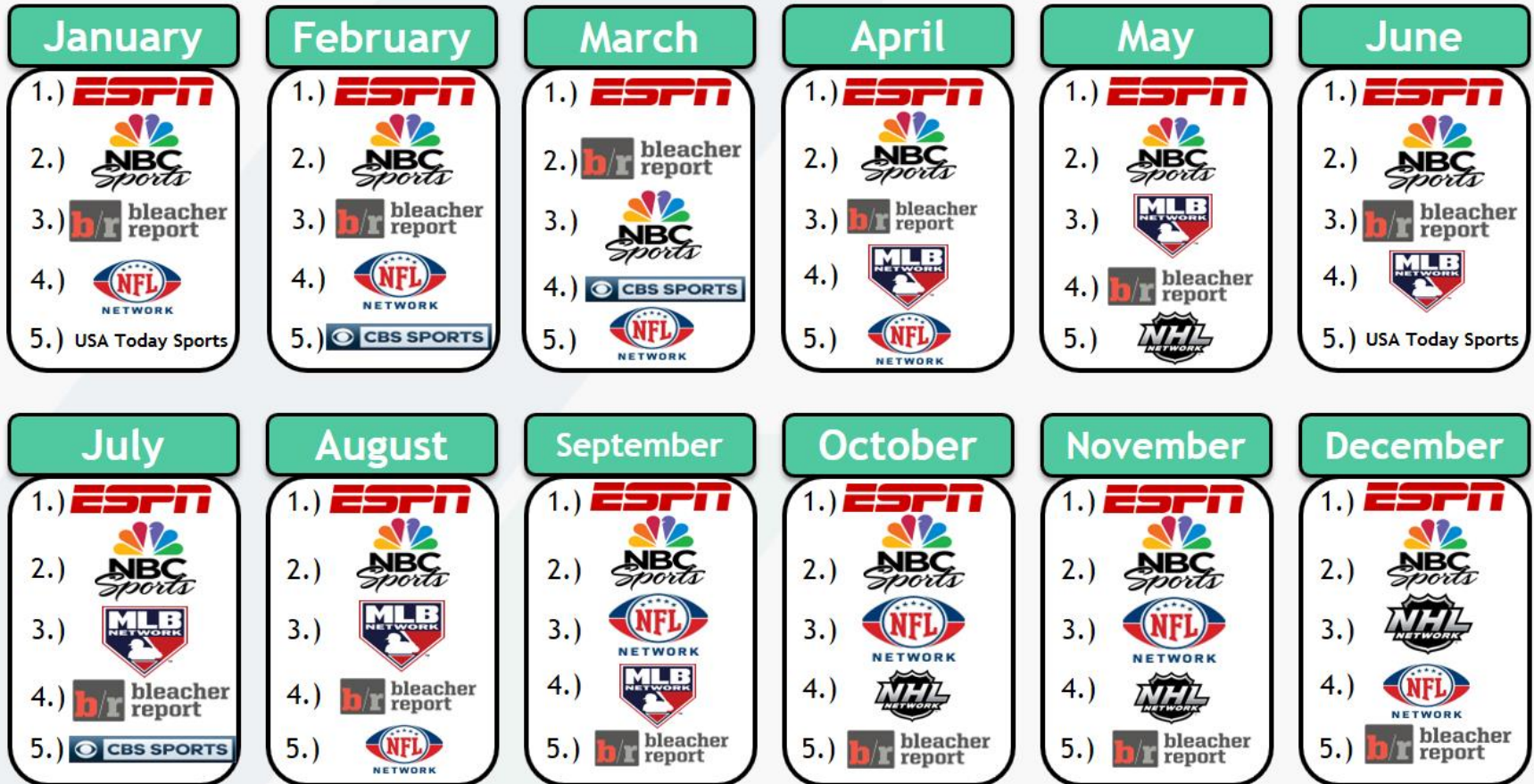


NO DAYS OFF!

Source: comScore MediaMetrix, multiplatform media trend data, January-December 2016; sports category, P2+, excludes non-sports media brands.


TV-Related Brands Also Make Up Almost All Of The Top 5 Monthly Digital Sports Platforms Among Millennials

Top 5 Sports Digital Platform Rank By Total Minutes Viewed (P18-34)



NO DAYS OFF!

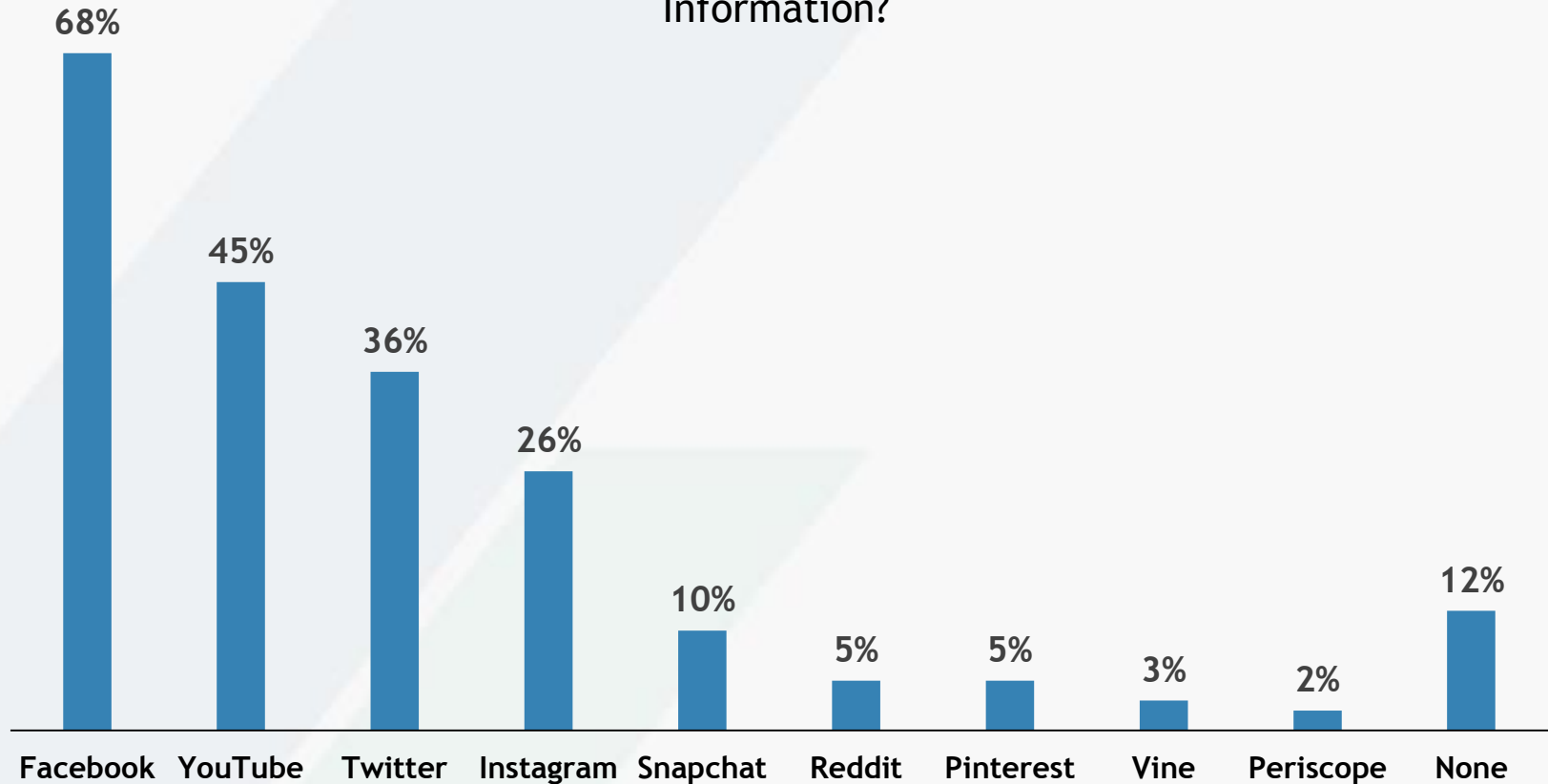
Source: comScore MediaMetrix, multiplatform media trend data, January-December 2016; sports category, P18-34, excludes non-sports media brands.



Collective Experiences Through Online & Offline Socializing

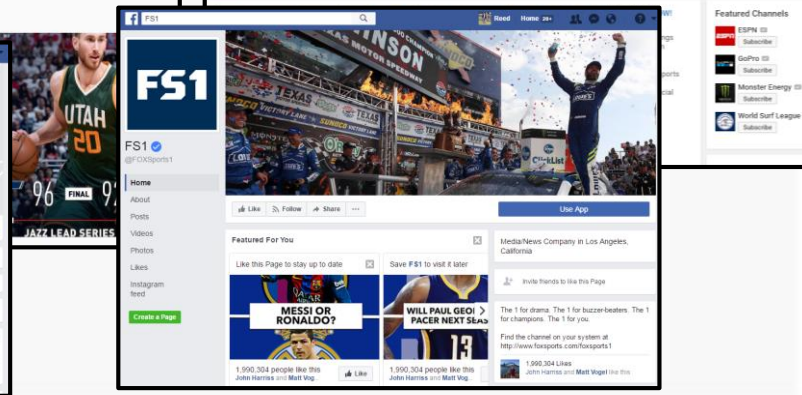
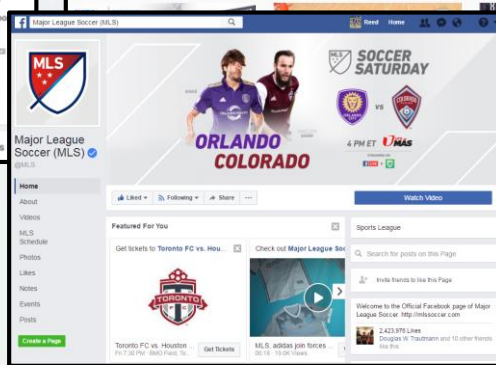
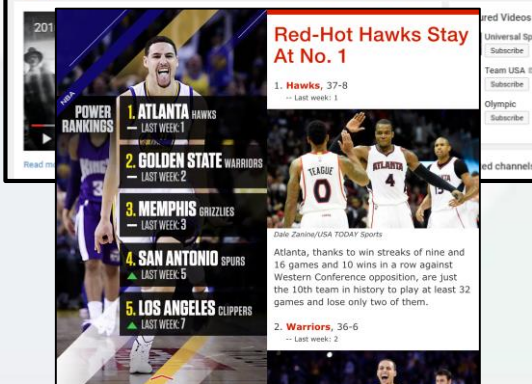
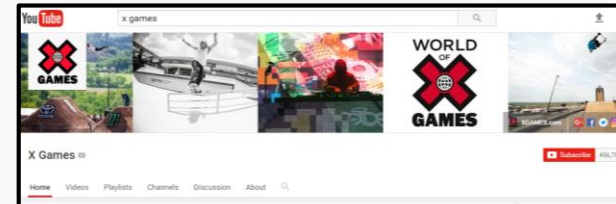
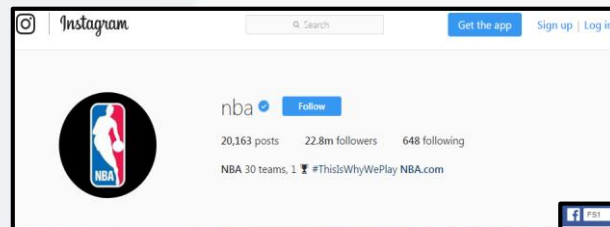
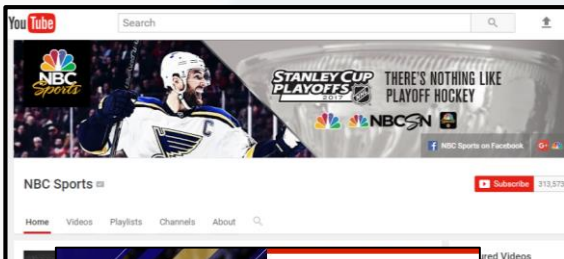
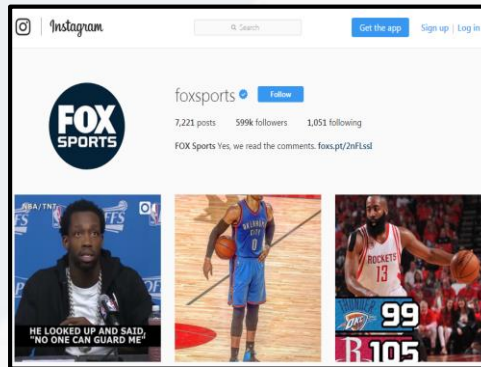
Facebook Is The Most Popular Social Media Platform For Fans To Get Sports-Related Content & Information

What Social Media Do You Use to Get Sports-Related Content and Information?



NO DAYS OFF!

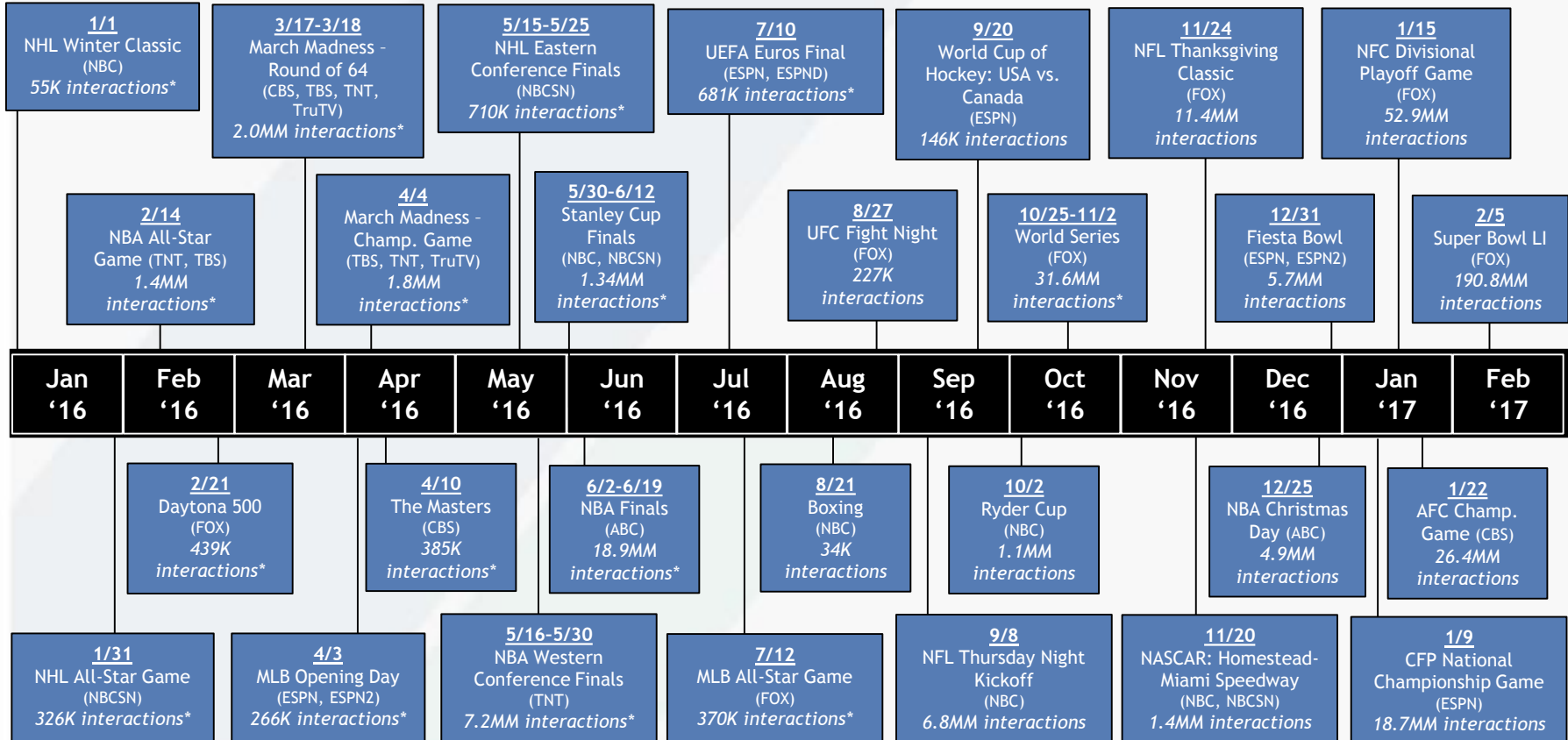
TV Sports Brands Have A Large Social Presence To Provide Fans With Extra Content & Keep Conversations Going Online



NO DAYS OFF!

There's A Consistent Stream Of Heavy Social Conversation Centered Around Televised Sporting Events

Social TV Interaction Highlights By Major Sporting Event

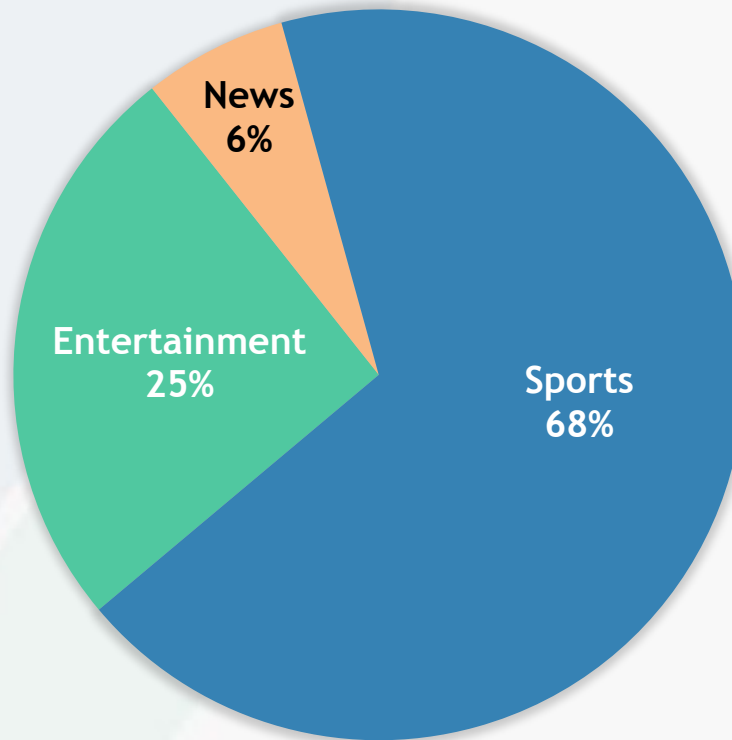


NO DAYS OFF!

Source: Nielsen Year In Sports Media Report 2016. For series, social interactions were added up across all games. *Reflects Twitter social interactions only, excludes Facebook.

Sports Typically Accounts For Over Two-Thirds Of Total Ad-Supported TV Topics That Trend In The Top 10 On Twitter During Primetime

Genre % Breakout of Top 10 Ad-Supported TV Trending Twitter Topics Four-Week Time Period (Primetime: Oct-Nov '16)



Note: 79% of Top 10 Primetime Twitter Topics overall were TV-related

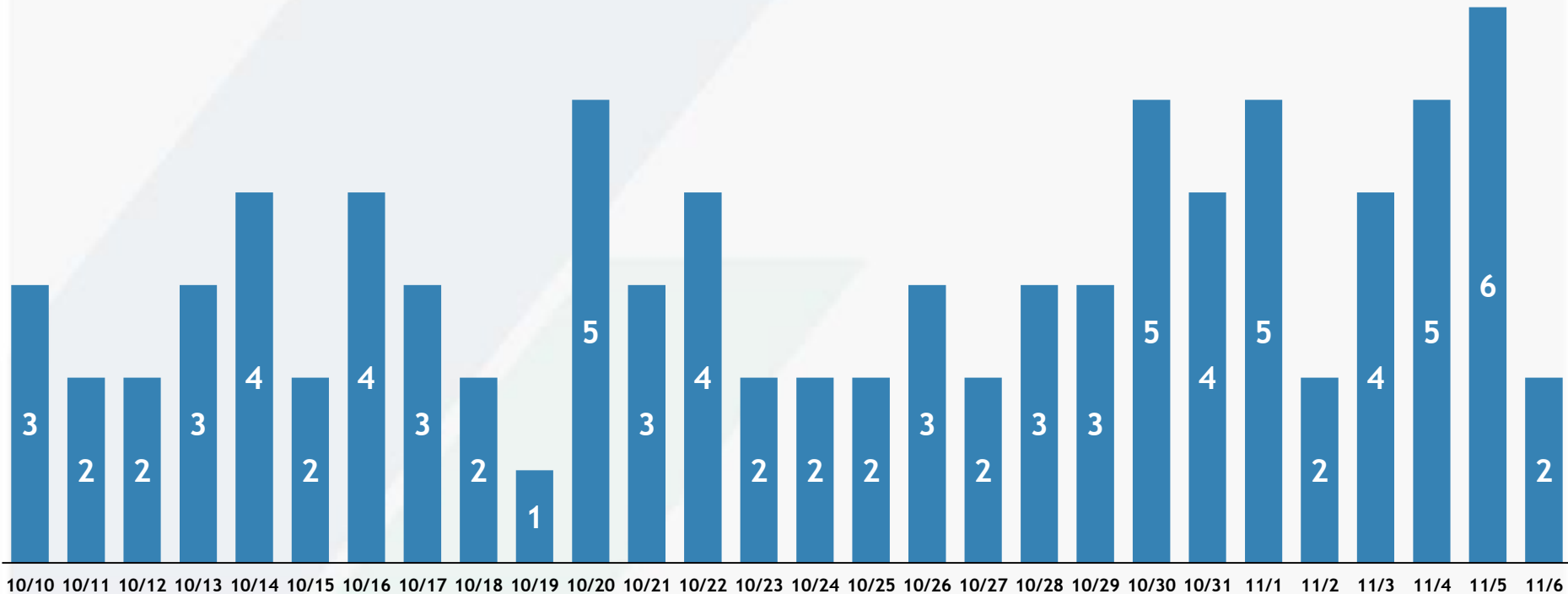
NO DAYS OFF!

Excerpted from the VAB's #TVisSocial report: <http://www.thevab.com/wp-content/uploads/2017/01/TVisSocial-Report.pdf>

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (8:15p, 9:15p, 10:15p, 11:15p) aggregated during 4-week time period (10/10-2016 - 11/6/2016). Results include both "direct" and "related" TV topics.

At Least One Ad-Supported TV Sporting Event Tends To Trend In The Twitter Top 10 At Some Point During *Each Night*

of Sporting Events Trending In The Top 10 During Each Night Four-Week Time Period (Primetime: Oct-Nov '16)



NO DAYS OFF!

Excerpted from the VAB's #TVisSocial report: <http://www.thevab.com/wp-content/uploads/2017/01/TVisSocial-Report.pdf>

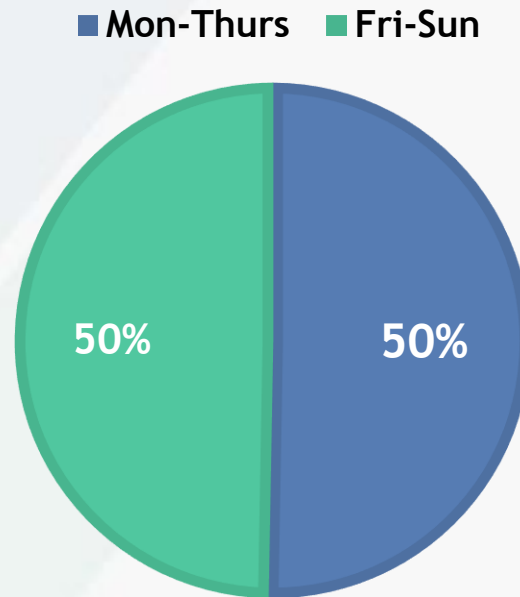
Source: VAB custom analysis of Top 10 trending Twitter Topics each night (8:15p, 9:15p, 10:15p, 11:15p) aggregated during 4-week time period (10/10-2016 - 11/6/2016). Results include both "direct" and "related" TV topics.



Sports Conversations Tend To Trend Equally Between Weeknights & Weekends

In terms of trends throughout the night, online sports conversation is particularly strong at the beginning of the night (8:15p), when the games in the eastern time zone get underway and towards the end of the night (11:15p) with the beginning of west coast games.

Top 10 Ad-Supported TV Sports Trending Twitter Topics By Day Four-Week Time Period (Primetime: Oct-Nov '16)



NO DAYS OFF!

Excerpted from the VAB's #TVisSocial report: <http://www.thevab.com/wp-content/uploads/2017/01/TVisSocial-Report.pdf>

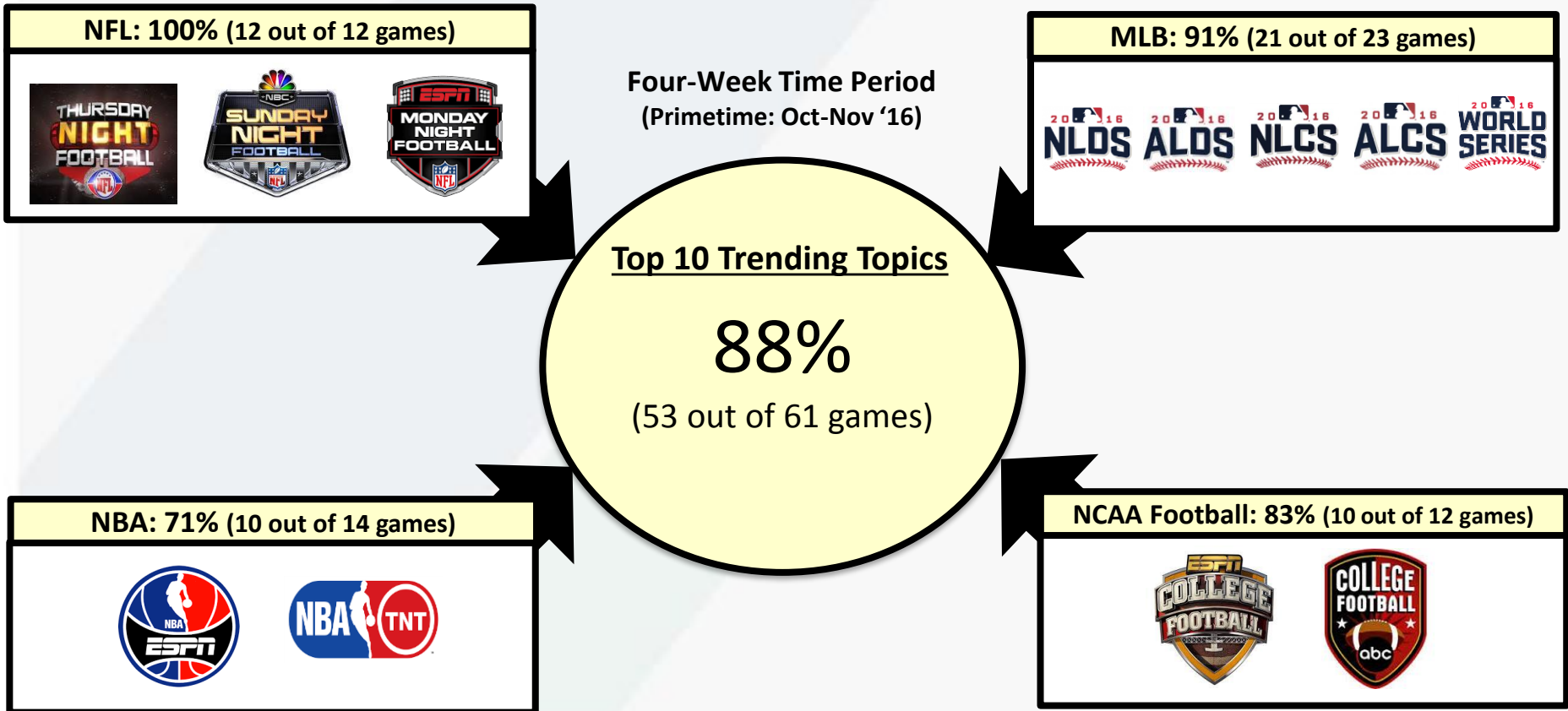


RESULTS ANALYSING BUREAU

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (8:15p, 9:15p, 10:15p, 11:15p) aggregated during 4-week time period (10/10-2016 - 11/6/2016). Results include both "direct" and "related" TV topics.

Nationally Televised Sports Almost Automatically Spur Some Of The Top Online Social Conversations During Their Airings

Almost 9 out of 10 nationally televised NFL, MLB, NBA and evening college football games across the major TV networks trend in the top 10 primetime Twitter topics on their respective nights during the monitoring period



Excerpted from the VAB's #TVisSocial report: <http://www.thevab.com/wp-content/uploads/2017/01/TVisSocial-Report.pdf>

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (8:15p, 9:15p, 10:15p, 11:15p) during 4-week time period (10/10/2016 - 11/6/2016). Results include both "direct" and "related" TV topics. NFL: Sunday Night Football on NBC - 10/16, 10/23, 10/30, 11/6; ESPN Monday Night Football - 10/10, 10/17, 10/24, 10/31; Thursday Night Football - 10/13, 10/20, 10/27, 11/3. NCAA Football: ESPN Friday Night Football - 10/14, 10/21, 10/28, 11/4; ABC Saturday Night Football - 10/15, 10/22, 10/29, 11/5; ESPN 10/15, 10/22, 10/29, 11/5. NBA: ESPN - 10/26, 10/28, 11/2, 11/4; TNT - 10/25, 10/27, 11/3. MLB: MLBN - 10/10; TBS - 10/10, 10/14, 10/15, 10/17, 10/18, 10/19; FS1 - 10/10, 10/11, 10/13, 10/15, 10/16, 10/18, 10/19, 10/20, 10/22; FOX - 10/25, 10/26, 10/28, 10/29, 10/30, 11/1, 11/2.

In The “Physical” Social Realm, Sports Is A Big Driver Of Out-Of-Home TV Viewing Which Can Add Substantial Reach

Whether it’s to:

- Just get out of the house and go to a local establishment for the game
 - 51% go to a bar or restaurant on a regular basis
- Meet up with friends for the “social camaraderie” aspect
 - More people participate in March Madness brackets for social camaraderie (42%) than to win money (39%)
- Socialize with your sports fanatic friends or alumni away from your home
 - 10% of people (6% of males / 15% of females) who don’t identify as a sports fan are a “friend of a sports fan”
- Have the opportunity to watch live action “out-of-market” games
 - A large number of traditional powerhouses and contemporary winners’ fanbases are located out of their home market; for instance 61% of the Golden State Warriors fans’ are outside the West Region; 54% of the Cleveland Cavaliers’ fans are outside the Midwest
 - 60% of Daily Fantasy Sports participants watch games involving teams they don’t usually follow because they are following their fantasy players



Out-Of-Home Viewing can significantly extend the reach of televised live sporting events:

- ABC received a 17% lift in average P6+ viewership across the seven games of the 2016 NBA Finals between Golden State & Cleveland; the lift jumped to 25% among P18-34
- Among March Madness bracket participants, 12% said their top way of following the games was viewing on TV in a public location

NO DAYS OFF!

Source: MRI GfK 2016 Doublebase; Nielsen Year In Sports Media Report 2016; #SCORE 2016 Sports Fan Behavior Study 2016; Center for the Digital Future at Annenberg/ThePostGame; DraftKings company reports.

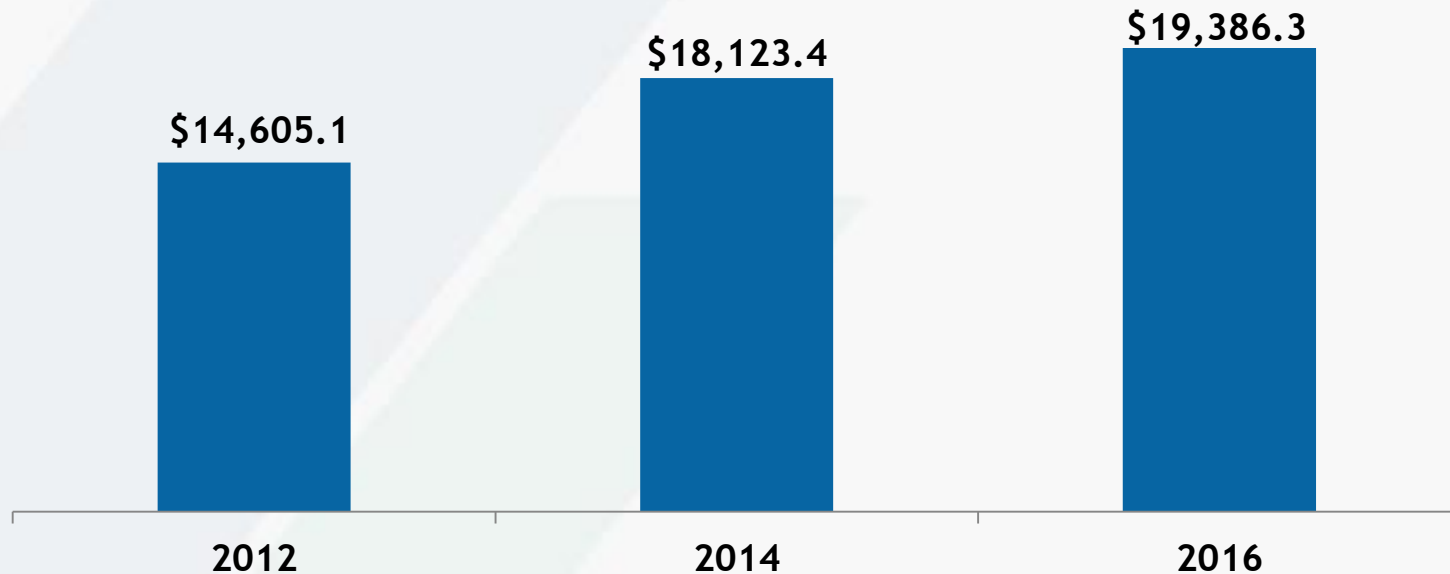


Sports Wrap-Up

As The Catalyst For Sports, It's No Surprise That National Advertisers Are Spending Almost \$20 Billion Annually On TV

Excluding Olympics, advertisers have spent 33% more on sports-related TV programming annually over the last four years.

Sports-Related National TV Advertising Spend (millions)



NO DAYS OFF!

Source: Nielsen Ad Intel, reflects national cable TV, Spanish language cable TV, broadcast TV, Spanish language broadcast TV. Excludes Olympics.

Sports TV's Ubiquitous Reach Makes The Genre Truly Desirable For Advertisers In Any Category

With major categories including automotive, telco, QSRs, financial / insurance and home; advertisers turn to sports to reach any desired lifestage from youth to mature adults.

Top 5 Advertisers By Major Sport

NFL	NBA	MLB	NHL	MLS	Golf	UFC	NCAA Basketball	NCAA Football
verizon✓	SAMSUNG	T	GEICO	Heineken	TaylorMade	metroPCS Unlimit Yourself.	AT&T	AT&T
McDonald's	TACO BELL	TACO BELL	DISCOVER NETWORK	WELLS FARGO	adidas	BUD LIGHT	CapitalOne	Chick-fil&
DIRECTV	AMERICAN EXPRESS	DIRECTV	SUBWAY	Audi	UNDER ARMOUR	GEICO	Northwestern Mutual FINANCIAL NETWORK*	TACO BELL
Apple	Corona Extra	GEICO	Coors LIGHT	Continental	NIKE	Applebee's	LOWE'S	CapitalOne
Ford	DIRECTV	Cialis tadalafil	HONDA	AT&T	Callaway	KFC	Coca-Cola	Dr Pepper

NO DAYS OFF!

Source: Nielsen Year In 2016 Sports Media Report. NFL reflects Q4'15 - Q3'16; all other sports reflect advertiser spend in their last full season.

The Highly Engaged Sports Ecosystem Allows Brands To Implement Successful & Innovative TV-Heavy 360 Integrations

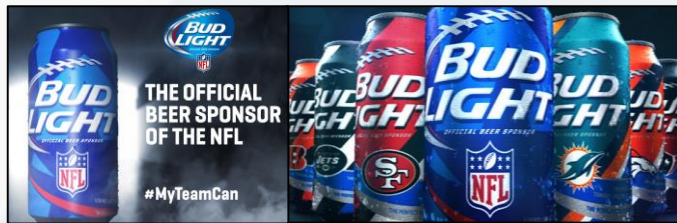
Dr. Pepper & College Football Playoffs



Taco Bell & NBA / Taco Bell & MLB



Bud Light & NFL



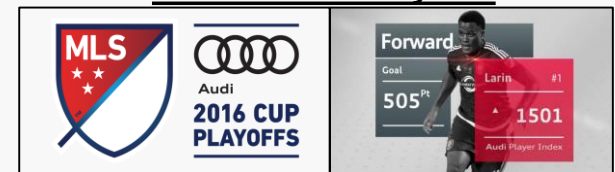
Buffalo Wild Wings & March Madness



AT&T & March Madness



Audi & MLS Playoffs



NO DAYS OFF!

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