



CABLE NATION: Ad-Supported Cable - *The Undisputed Sports Champion*

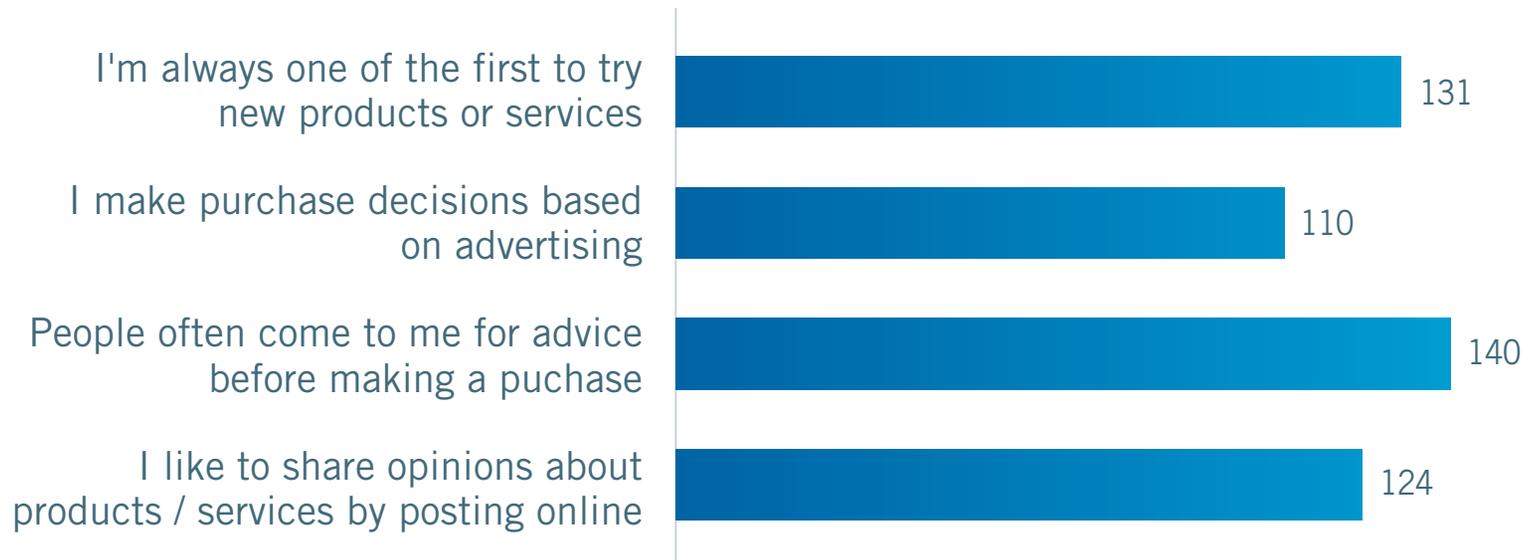
Cable Sports Scorecard

- Over the last 10 years there's been a substantial shift of signature live sporting events migrating to cable from broadcast
- With 7,000+ live sports telecasts and events airing everyday of the year, cable dominates the landscape by airing 87% of all live sporting events
- Sports telecasts on broadcast TV are almost non-existent during the week, giving Cable a huge programming advantage during the crucial Wednesday-Thursday retail advertising days
- Beyond live events, cable is the clear winner when it comes to reaching the hardcore sports fan with 97% of all highlights, news & analysis telecasts
- Cable offers the majority of available live sports GRPs for 10 out of the 12 top sports and 69% of total sports-related M18-49 GRPs overall
- Cable sports garner almost 70% of social conversations among the most buzzed about sports programs
- 7 out of the top 8 sports websites and 6 out of the top 10 iPad apps now feature branded cable content
- With more league rights being negotiated, continued programming shifts and new network launches, cable is well positioned to extend its' dominance deep into the future

Beyond Ratings, Why Are Sports So Important To Advertisers? Because Placing Brands In Front Of Passionate Fans Is A Winning Formula

“Super” Sports fans are much more likely to be *early adopters*, *influencers* and *advocates* of brands but can also be *motivated to purchase* by advertising

“Super” Sports Fan – Attitudes On Purchases & Products A18+ Index



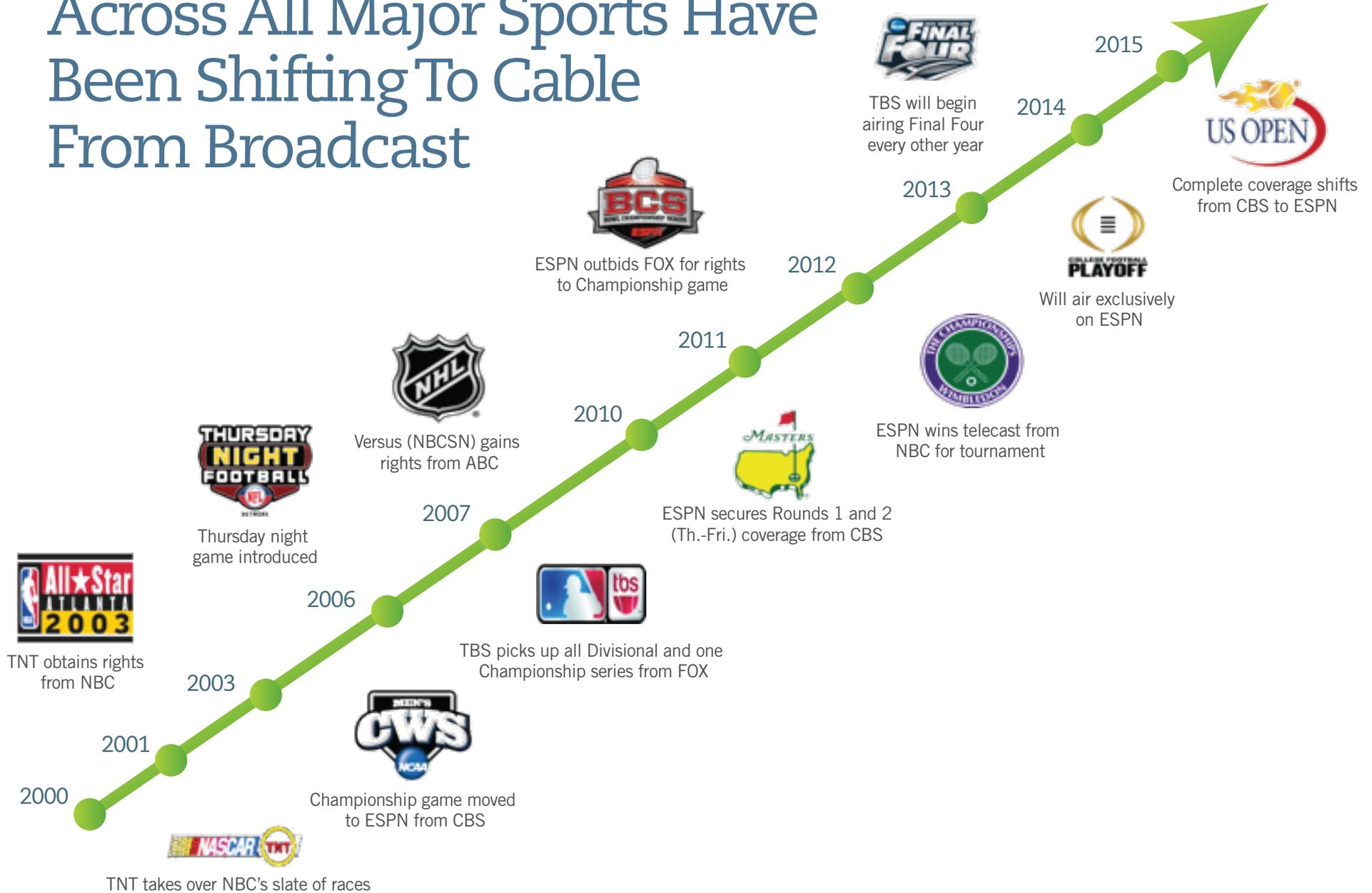
How to read: Super Sports Fans are 40% more like to agree to the statement “people often come to me for advice before making a purchase” than the average adult

Source: 2012 MRI Doublebase. “Super” Sports Fan self identification makes up 9% of the total population

Statements: “I’m always one of the first to try new products or services (agree mostly), “ “I don’t make purchase decisions based on advertising (disagree mostly),”

“People often come to me for advice before making a purchase (any agree)”, “I like to share opinions about products / services by posting online (agree mostly)”

Signature Live Sporting Events Across All Major Sports Have Been Shifting To Cable From Broadcast



Cable Dominates With 87% of All Live Sporting Events Totaling Over 7,000+ Telecasts

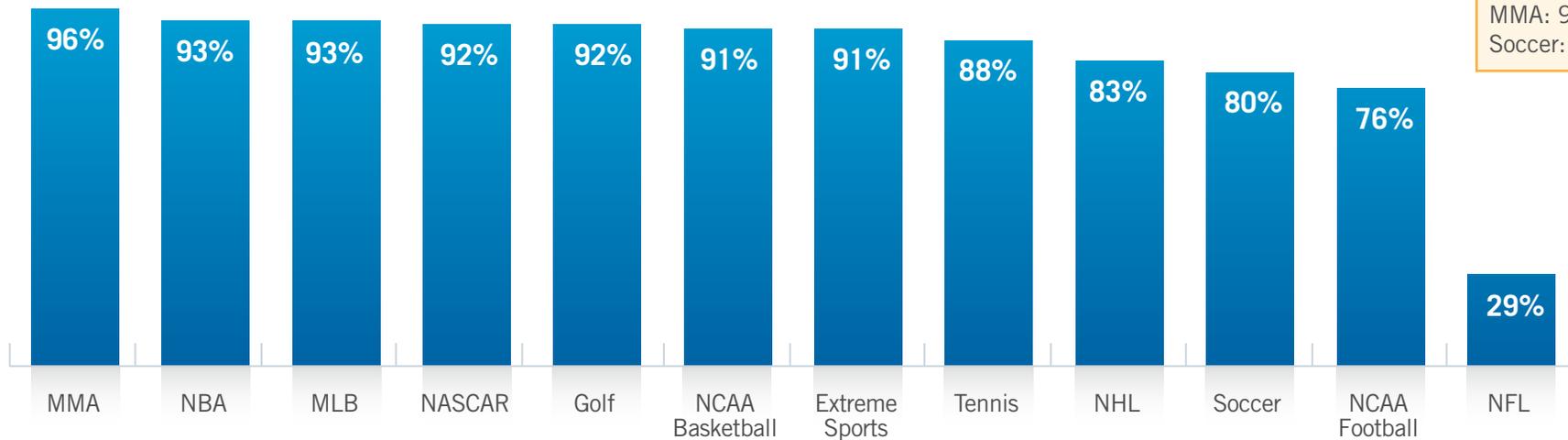
This dominance is consistent across quarters

	Q3 '12	Q4 '12	Q1 '13	Q2 '13	Total
All Measured Nets:	88%	86%	88%	87%	87%
Excluding Spanish Language Networks:	92%	89%	92%	91%	91%

The vast majority of sporting events air on cable for *11 out of the 12* most popular sports

% of All Live Sports Telecasts on Ad-Supported Cable

Q3'12 - Q3'13



Excl SLNs:
MMA: 99%
Soccer: 98%

*Top sports determined by total ratings

Source: CAB Analysis of Nielsen Npower data. Live Sports includes live + original first run events (excluding Olympics and wrestling).

Dates: Q3'12 – Q2'13 (6/25/12 – 6/30/13).

Broadcast Networks: ABC, CBS, FOX, NBC / AZA, MFOX, TEL, UNI, UNIMAS

Cable Networks: CNBC, ESPN/2, ENN, ESPNU, FUEL, FX, FOX SOCCER, GOLF, MLB, NBA, NBCSN, NFL, SPEED, SPIKE, TBS, TRU, TNT, WGN / FOXD, GALA, MUN2, TR3S

Cable Features Live Sports *Everyday* of The Year

Cable Has A Big Lead On Broadcast For Number of Days Airing Events Within the Major Sports... Even For the NFL!

# of Days With Live Sports			
Sports	Broadcast TV	Cable TV	Cable: +/- Days
All Sports	144	365	+221
Extreme Sports	7	63	+56
Golf	82	221	+139
MLB	35	233	+198
MMA	4	68	+64
NASCAR	20	121	+101
NBA	23	230	+207
NCAA Basketball	33	145	+112
NCAA Football	20	74	+54
NFL	32	56	+24
NHL*	24	99	+75
Soccer	12	280	+268
Tennis	18	82	+64

*season shortened by lockout

Source: CAB Analysis of Nielsen Ad*Views data. Live Sports includes live + original first run events (excluding Olympics, wrestling and Hispanic networks).

Dates: 7/1/12 – 6/30/13.

Broadcast Networks: ABC, CBS, FOX, NBC

Cable Networks: CNBC, ESPN/2, ENN, ESPNU, FUEL, FX, FOX SOCCER, GOLF, MLB, NBA, NBCSN, NFL, SPEED, SPIKE, TBS, TRU, TNT, WGN

Cable Has An Even Bigger Advantage In Live Sports During Key Retail Advertising Days

Broadcast TV airs very few live sports on the key retail ad days of Wednesday & Thursday

of Days (Weds-Thurs) With Live Sports

Sports	Broadcast TV	Cable TV	Cable: +/- Days
All Sports	14	104	+90
Extreme Sports	0	12	+12
Golf	1	63	+62
MLB	4	64	+60
MMA	0	19	+19
NASCAR	0	12	+12
NBA	3	64	+61
NCAA Basketball	2	39	+37
NCAA Football	0	21	+21
NFL	3	21	+18
NHL*	2	28	+26
Soccer	0	81	+81
Tennis	1	20	+19

*season shortened by lockout

Source: CAB Analysis of Nielsen Ad*Views data. Live Sports includes live + original first run events (excluding Olympics, wrestling and Hispanic networks).

Dates: 7/1/12 – 6/30/13.

Broadcast Networks: ABC, CBS, FOX, NBC

Cable Networks: CNBC, ESPN/2, ENN, ESPNU, FUEL, FX, FOX SOCCER, GOLF, MLB, NBA, NBCSN, NFL, SPEED, SPIKE, TBS, TRU, TNT, WGN

A Large Majority of Available Live Sports Rating Points In 10 out of the Top 12 Sports Reside On Cable

% Available Live Sports TV GRPs On Cable

Sports	A18-34	A18-49	A25-54	M18-34	M18-49	M25-34
Extreme Sports	85%	83%	79%	87%	85%	81%
Golf	46%	47%	46%	49%	50%	49%
MLB	66%	65%	63%	69%	68%	66%
MMA	78%	78%	78%	78%	78%	79%
NASCAR	55%	59%	60%	56%	61%	62%
NBA	73%	71%	70%	75%	73%	72%
NCAA Basketball	61%	59%	57%	64%	61%	59%
NCAA Football	56%	55%	55%	58%	57%	56%
NFL	19%	18%	18%	20%	20%	19%
NHL	65%	65%	64%	67%	67%	65%
Soccer	94%	93%	93%	95%	95%	94%
Tennis	72%	69%	67%	76%	74%	71%

Source: CAB Analysis of Nielsen Ad*Views data. Live Sports includes live + original first run events (excluding Olympics, wrestling and Hispanic networks).

Dates: Q3'12 – Q2'13 (6/25/12 – 6/30/13). GRPs are equitized

Broadcast Networks: ABC, CBS, FOX, NBC

Cable Networks: CNBC, ESPN/2, ENN, ESPNU, FUEL, FX, FOX SOCCER, GOLF, MLB, NBA, NBCSN, NFL, SPEED, SPIKE, TBS, TRU, TNT, WGN

There's No Competition When It Comes To Reaching The Hardcore Sports Fan Through Highlights, News & Analysis Programming

Creating constant engagement with passionate fans through year round sports programming, Cable is the clear winner with 97% of all sports-related telecasts



Cable Programming

Sports	% of TCs	# of Days
General Sports	97%	365
Extreme Sports	99.8%	203
Golf	99%	365
MLB	99%	365
MMA	99%	365
NASCAR	96%	347
NBA	99.7%	365
NCAA Basketball	95%	157
NCAA Football	94%	297
NFL	97%	365
NHL*	99%	149
Soccer	98%	365
Tennis	93%	98



Source: CAB Analysis of Nielsen Npower & Ad*Views data. Sports-related programs exclude live sports & original first run events (as well as Olympics and wrestling).

Dates: 7/1/12 – 6/30/13. *NHL Season shortened by lockout.

Broadcast Networks: ABC, CBS, FOX, NBC / AZA, MFOX, TEL, UNI, UNIMAS

Cable Networks: CNBC, ESPN/2, ENN, ESPNU, FUEL, FX, FOX SOCCER, GOLF, MLB, NBA, NBCSN, NFL, SPEED, SPIKE, TBS, TRU, TNT, WGN / FOXD, GALA, MUN2, TR3S

Cable Has An Overwhelming Majority of Available Total Sports-Related Rating Points In 11 out of the Top 12 Sports

Two out of three available M18-49 rating points within sports are on cable

% Available Total Sports-Related TV GRPs On Cable

Sports	A18-34	A18-49	A25-54	M18-34	M18-49	M25-34
All Sports	68%	65%	63%	72%	69%	67%
Extreme Sports	84%	81%	78%	87%	84%	80%
Golf	63%	64%	63%	65%	66%	65%
MLB	75%	75%	73%	79%	78%	76%
MMA	89%	90%	90%	90%	91%	91%
NASCAR	64%	67%	67%	67%	69%	69%
NBA	78%	77%	75%	80%	79%	77%
NCAA Basketball	61%	59%	56%	64%	61%	58%
NCAA Football	63%	61%	60%	66%	63%	62%
NFL	35%	33%	32%	39%	37%	36%
NHL	68%	68%	66%	70%	70%	68%
Soccer	95%	95%	95%	96%	96%	95%
Tennis	73%	70%	68%	78%	74%	72%

Source: CAB Analysis of Nielsen Ad*Views data. Sports-related programs exclude live sports & original first run events (excluding Olympics, wrestling and Hispanic networks).

Dates: Q3'12 – Q2'13 (6/25/12 – 6/30/13). GRPs are equivilized.

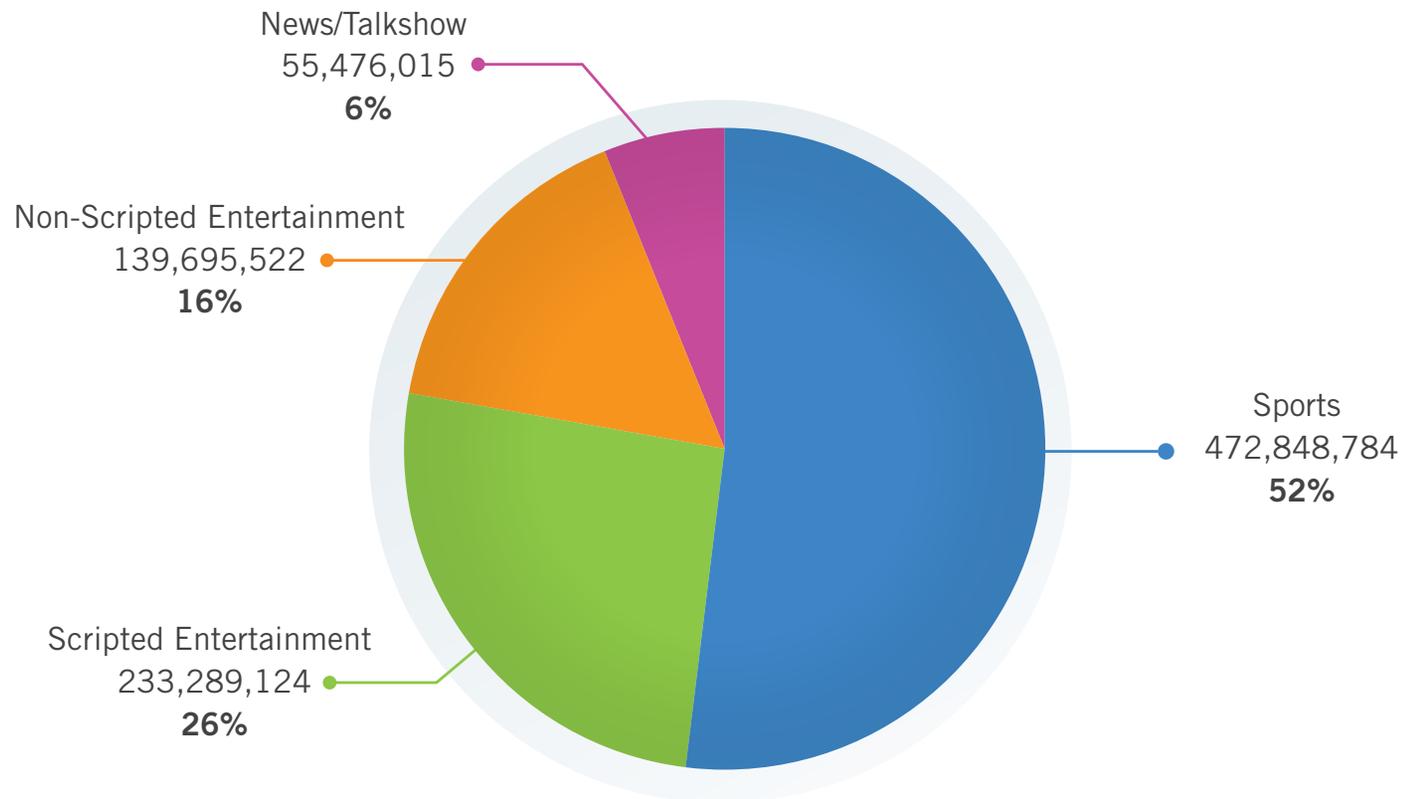
Broadcast Networks: ABC, CBS, FOX, NBC

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People Are Much More Likely To Engage In Social Chatter About Sports Than Any Other Program Genres

Sports make up only 24% of measured programs but get 52% of total social mentions

Social TV Buzz vs. First Half 2013 Sports Programming



Source: Trendrr Q1 & Q2 2013, excluding awards, specials and Hispanic programming (includes Super Bowl)

Sports: Sports programming

Scripted: adventure, animated, anthology, children, comedy, court show, drama, miniseries, mow, soap

Non-Scripted: documentary, game show, music, reality, variety

News/Talk show: News, Talk show

Live Sports on Cable Garner Almost 70% of Social Conversations Among The Top 10 Most Buzzed About Sports Programs

Social TV Buzz vs. First Half 2013 Sports Programming

8 of the top 10 buzzed about sports programs were on Cable

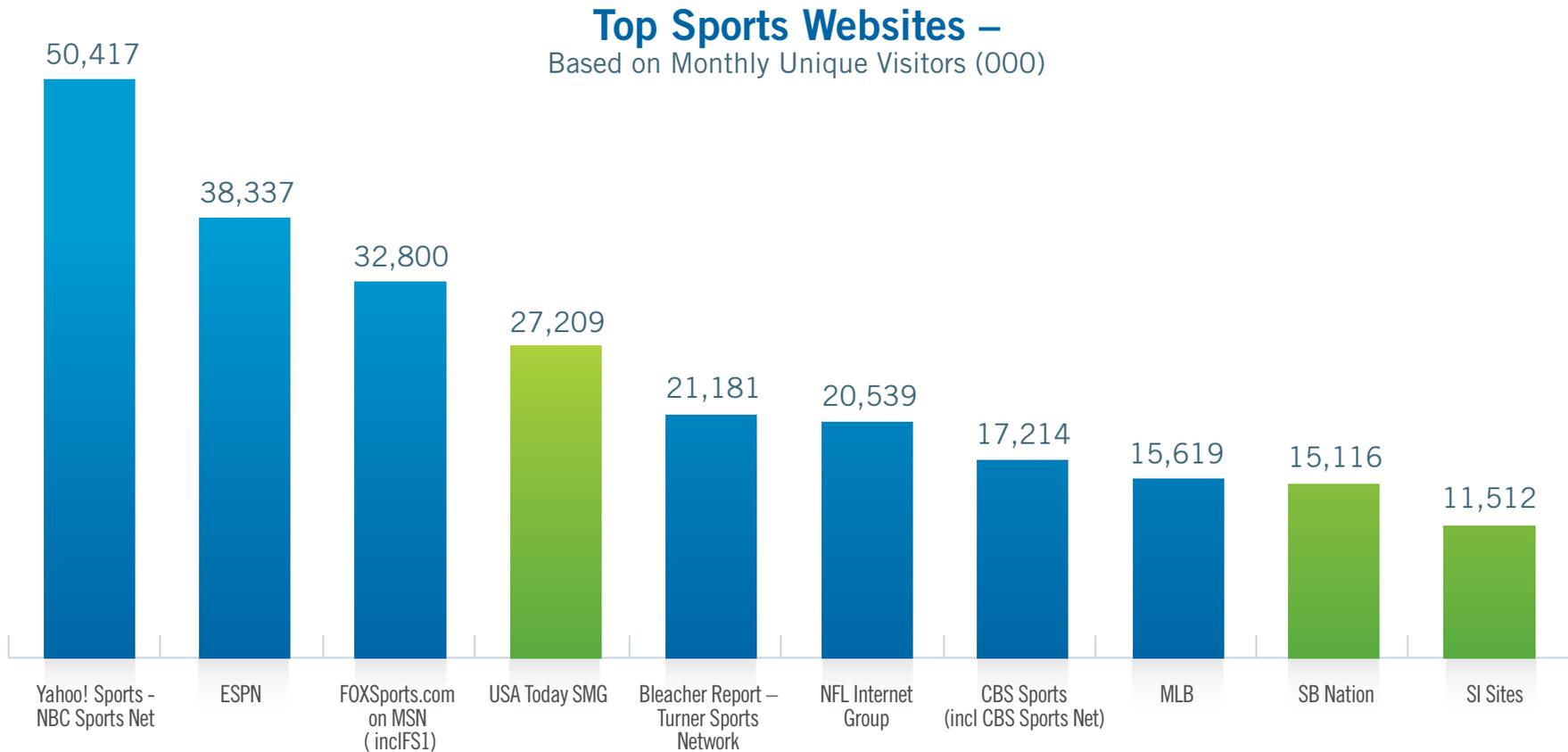
Rank	Program	Network	Social Mentions
1	NBA on TNT	TNT	51,725,151
2	NBA on ABC	ABC	49,753,421
3	NCAA Basketball on CBS	CBS	39,485,270
4	NBA on ESPN	ESPN	36,996,326
5	NCAA Basketball on TBS	TBS	28,048,621
6	NHL on NBCSN	NBCSN	23,918,021
7	NCAA Basketball on truTV	truTV	17,944,613
8	NBA on NBA TV	NBA TV	16,105,816
9	Soccer on ESPN	ESPN	14,333,969
10	NCAA Basketball on TNT	TNT	14,136,256
		10 Total:	292,447,464
Top 10 Totals		Cable:	203,208,773 69%
		Broadcast:	89,238,691 31%

Rank	Program	Network	Social Mentions
11	NFL on CBS	CBS	8,927,216
12	NHL on NBC	NBC	8,536,163
13	Soccer on FOX	FOX	8,526,662
14	NFL on FOX	FOX	7,955,918
15	NCAA Football on ESPN	ESPN	5,825,993
16	Soccer on ESPN2	ESPN2	3,945,514
17	NASCAR on FOX	FOX	3,637,996
18	MLB on ESPN	ESPN	3,256,705
19	Tennis on ESPN	ESPN	2,043,146
20	NHL on CNBC	CNBC	2,042,440
		20 Total:	347,145,297
Top 20 Totals		Cable:	220,322,651 63%
		Broadcast:	126,822,646 37%

Note: If the Super Bowl (55.5MM mentions) were included in the rankings then cable would make up 55% of mentions within the Top 20

Sitting Atop The Leaderboard, Branded Cable Content Is Very Much Sought After On The Internet

7 out of the 8 largest sports websites feature video content from a cable network partner



Source: comScore August 2013

Cable Is Also A Big-Time Player When it Comes To Video Content on iPad Apps

6 out of the 10 most popular iPad sports apps feature branded cable content

Rank	App Name
1	NFL Mobile
2	WatchESPN
3	ESPN Fantasy Football
4	ESPN College Football
5	Yahoo! Fantasy Sports
6	ScoreCenter for iPad
7	B/R Team Stream HD
8	CBS Sports Fantasy Football
9	CBS Sports (incl CBS Sports Network)
10	Watch NFL Network

With New League Rights Deals, Programming Shifts And Network Launches, Cable Is Well Positioned To Extend Its' Sports Dominance Deep Into The Future

Forbes

SPORTSMONEY | 4/27/2012 @ 1:49PM | 3,845 views

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By RYAN NAKASHIMA and RONALD BLUM 01/28/13 06:13 PM ET EST AP

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Published: May 10, 2012

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BY STEVEN RONDINA (FEATURED COLUMNIST) ON AUGUST 19, 2013

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By RICHARD SANDMIR Published: May 7, 2013

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