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What the Industry Reads First

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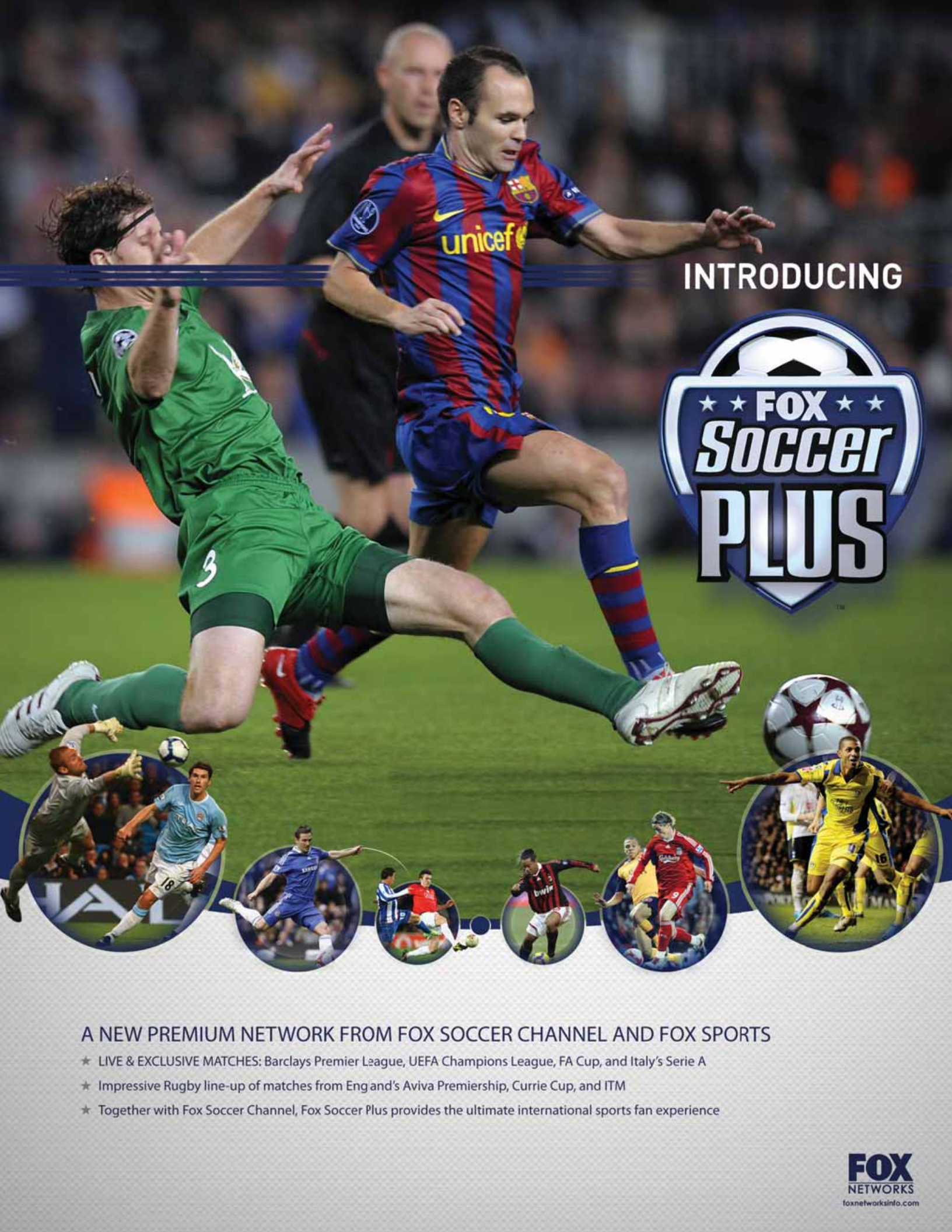
Back of the Net: Cable Scores Early and Often with World Cup Coverage

Spain displayed beautiful soccer to earn its first World Cup trophy, but the tourney's stateside media players warrant some recognition as well. Despite lofty expectations and a few common Cup laments—a dearth of scoring, the incessant vuvuzela buzz and histrionics from players when hardly touched—little proved to shut out, stifle or mislead the success achieved by **ESPN, Univision, Fox Soccer** and others across platforms. Whether this Cup bounty will spur greater soccer fandom in the US remains to be seen, yet recent data—namely from Jun 11-Jul 11—may tilt the answer toward an affirmative. “There was a real palpable interest in World Cup soccer that I think went beyond previous years,” said Fox Soccer evp/gm *David Nathanson*, noting that ESPN and Univision both did a “strong job creating awareness and covering the event across platforms.” The linear side regarding live matches was defined by records and more records. The World Cup final drew 24.3mln US viewers across **ABC** and Univision to become the most-watched soccer match in US history, according to **Nielsen**. ABC's coverage now ranks as the most-watched men's World Cup match ever in the US among total viewers with 15.55mln, and Univision's feature garnered 8.82mln total viewers, marking just 1 of the net's new Cup final viewership records along with 5.4mln 18-49s, 3.3mln 18-34s and 4mln 12-34s. As the Cup crescendo followed previously-set tourney records for both ESPN and Univision, including Mexican and American team and opening day results, approx 111.6mln US viewers watched at least 6 minutes of the World Cup on English- or Spanish-language nets, according to Nielsen. That number marks a 22% increase over '06 and represents half of all US homes and 38% of all American viewers. Yes, half of all US homes! Over all 64 matches, ESPN nets (ESPN/ESPN2/ABC) averaged a 2.1 HH rating, 2.29mln homes and 3.26mln total viewers, scoring respective increases versus '06 of 31%, 32% and 41%. Univision averaged 2.4mln total viewers (+15%) throughout the tourney, its highest ever, while luring an avg of 1.4mln 18-49s (+6%) and 761K 18-34s (+9%). Moreover, this year's event included 4 of the 5 most-watched World Cup matches in Univision's history. “The audience levels exceeded our expectations across the board,” said ESPN vp, programming *Scott Guglielmino*. “We took great care to market this event as the world's greatest sport on the biggest stage.” Univision pres, news *Alina Falcon* echoed the sentiment, and nearly verbatim. “It exceeded all our expectations,” she said of Univision's overall Cup performance. “We did extremely well with our over 900 hours of coverage.”

Exceeding Expectations

Before the Cup kicked off, how non-match TV coverage or replays would fare across ESPN, Univision and Fox Soccer was a key question that needed answering. Certain results provided a stentorian answer. ESPN's “World Cup Live” program, for example, delivered audiences that more than doubled the corresponding '09 dayparts (the show didn't exist in '06), including a 1.5 HH rating for noon-1pm airings and a 1.1 for 4:30-5pm blocks. Match replays on **TeleFutura** and **Galavision** combined to earn respective 23% and 20% growth in total viewers and 18-49s compared to '06. And Nathanson said Fox Soccer's supplementary coverage, particularly its “Ticket to South Africa” program, “did very, very well on a cume basis.”

Usage and traffic across digital platforms for Cup content also delivered superb results, and—you guessed—exceeded expectations. ESPN Digital Media garnered nearly 4.9bln minutes of usage as an avg of more than 110K fans/min consumed the sports giant digital offerings during the tourney. ESPN.com's Cup content alone delivered 128mln visits and 431mln page views, and ESPN's mobile TV offering reached 1mln uniques during the event and registered 93mln total minutes of viewing to set viewership records on major mobile TV platforms **MobiTV** and **FLO TV**. Asked what digital data he found most impressive, Guglielmino quickly touted ESPN3.com. “The time spent at the site is pretty impressive to me,” he said. The broadband play's match coverage tallied 7.4mln unique viewers while each unique averaged more than 2 hours of viewing, and all 54 live matches



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were viewed by an avg of 114K persons/min. Collectively, ESPN's Cup digital success offers "validation of our best available screen concept," said Guglielmino. "From our perspective, we had a very unique proposition.

Broadband Go-o-o-a-a-als

Data show that Univision viewers got their kicks from alternate platforms too, spurring record-breaking results across Univision's online and mobile offerings. Univision Futbol earned 34.7mln total online and mobile visits, and fans streamed more than 10mln total hours of live video on UnivisionFutbol.com. On avg each day, users spent nearly 90min per viewing session across more than 265K unique media players. The Univision Futbol mobile app has been downloaded more than 450K times through **Apple's** iTunes. "Our goal is to deliver the World Cup when and where our viewers can watch so that they can enjoy every minute of such an important event," said Falcon. "We leveraged all of our media platforms to deliver an unparalleled World Cup experience." And don't forget FoxSoccer.com, which Nathanson said was the leading Website for World Cup content in the US. **comScore** numbers show the site garnered 8.4mln uniques in Jun amid a flurry of matches, beating out **ESPNSoccernet.com** (8.23mln) and **FIFA.com** (8.18mln). The site also established a daily page views record (75mln) during the tourney, for the post-game period that followed the US-Ghana game. "It's a testament to the in-depth analysis we were able to provide," said Nathanson, adding that partner sites **FoxSports.com** and **MSN.com** did a commendable job in directing traffic to FoxSoccer.com, and that popular mobile apps "really led to the stickiness."

And So, What Now?

OK, jobs well done by ESPN, Univision and Fox Soccer in surrounding the World Cup with compelling content. But what happens now? Did the tourney imbue soccer fans with even greater interest in the sport? Were legions of casual fans converted to full-time status? Both probably occurred to a modest degree, and the continued growth of the US Hispanic population can only aid soccer in its quest for year-round relevancy. In the sport's favor are the Cup viewership/usage records established by ESPN and Univision (the guess here is new US residents and casual fans drove much of the growth), plus Fox Soccer's Web success because the net largely caters to die-hards. Of course, only time will tell. "There's no denying there's going to be a fall off in soccer interest, but that gives us an opportunity to reach out," said Nathanson. "The hope is that we've given fans a reason to tune in well after the World Cup is over." To help achieve that goal, Fox Soccer is launching a new promotional campaign highlighting some stars that played in the World Cup and will soon play games in leagues that air on the net.

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Univision's in a similar position, holding rights to multiple global soccer leagues and priding itself on its status as a year-round destination for soccer fans. Thanks to an increase in soccer participation on myriad levels, "soccer continues to grow," said Falcon. "But more importantly, I think it is also being driven by the growing numbers of Hispanics in the US. Soccer is a huge passion point in our home countries and a tradition that unites friends and families." ESPN's Guglielmino said the net was "bullish on the sport before the World Cup regardless of the results," which excelled to "bode well for the World Cup [going forward] and maybe for soccer in general."

For now, cable nets, like Spain, deserve to soak in their World Cup success.

Fan Pockets

So, did the World Cup play in Peoria? Perhaps, but the city's audience levels surely didn't approach those achieved by the leading markets. And the leadership's constitution is a story in itself, underscoring the importance of US markets with high percentages of Hispanic and/or ethnic populations to the success of the World Cup specifically—and American soccer content generally. The top 5 markets for ESPN's complete match coverage, for example, were Miami-Ft. Lauderdale, New York, Washington, D.C., San Diego, and San Francisco. Also, the net's final match coverage received the greatest play in San Fran, San Diego, NY, Miami-Fort Lauderdale and D.C. In the next column to the right are local market rankings for the final from Nielsen covering English- and Spanish-language nets combined.

2010 World Cup Finals (7/11/10) Local Market Rankings – English Language

Rank	Market	Rating	Share	HHs (000)
1	San Fran-Oakland-San Jose	14.7	36	367
2	San Diego	13.6	28	146
3	New York	13.1	30	984
4	Miami-Ft. Lauderdale	12.0	22	184
5	Washington, DC	11.9	25	277
6	Los Angeles	11.3	24	642
7	Austin	10.3	21	70
8	Seattle-Tacoma	10.0	26	183
9	Cincinnati	9.5	19	87
10	Boston (Manchester)	9.1	22	220

2010 World Cup Finals (7/11/10) Local Market Rankings – Spanish Language

Rank	Market	Rating	Share	HHs (000)
1	Miami-Ft. Lauderdale	16.8	31	259
2	Los Angeles	11.9	25	675
3	Houston	10.7	21	228
4	Las Vegas	8.1	15	59
5	San Antonio	6.7	13	56
6	Dallas-Ft. Worth	6.6	14	169
7	Phoenix	5.6	12	104
8	New York	5.4	12	404
9	Austin	5.1	10	35
10	Chicago	4.5	10	158

Source: The Nielsen Company

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