



[Special Cable Report](#) - published September 27, 2013

# Analysis: RE-BRAND AND CONQUER? NBC and FOX attempt to take a bite out of ESPN's sports-coverage hegemony by focusing on centralized, broad coverage.



For more than three decades, ESPN has held a vice-like grip on the Male, 25-54 sports-watching demographic in spite of efforts on the part of other major networks to create their own hubs for cable sports coverage. Past efforts at competition have largely focused on specificity, whether it be FOX's Speed channel or FOX Soccer, or the NFL's own proprietary channel— a stark contrast to ESPN's strategy of bombarding the market with a sheer array of options. All jokes about "ESPN 8- the Ocho" aside, the network managed to effectively expand not by creating niche networks focused around different sports, but by creating multiple "tiers" of channels. While ESPNU or Deportes did offer something categorically different than the standard channel, they still followed a similar structure and offered a similar variety of programming. In spite of efforts by NBC and FOX, among others, to try and corner niche markets that ESPN had eschewed, the Bristol powerhouse has continued to steamroll its competitors throughout the past two decades.

In an attempt to try and carve out more of the market share, NBC and FOX have made some major rebranding shifts within the past year, as NBC completed its two-year transition from Versus to NBC Sports Network, as the network is now going by its initials, NBCSN, in an attempt to help bolster the brand before the upcoming Olympics. FOX's changes are more drastic and more immediate, as FOX shut down FOX Soccer (in favor of FXX), and consolidated its other channels into FOX Sports 1 and Fox Sports 2. The transition away from niche programming to trying to beat ESPN at its own game is a bold move, but has it paid off for either network?

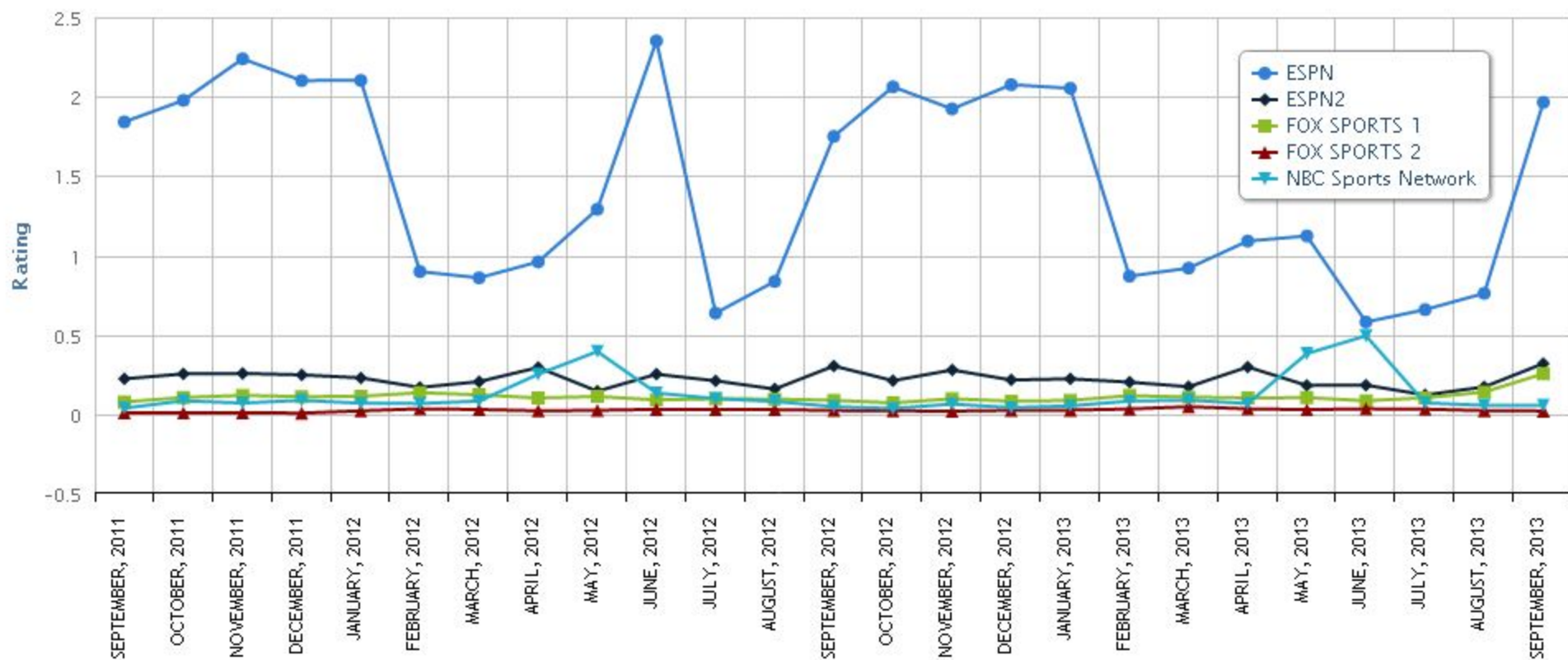



## M25-54 Live+SD Total US Ratings Trend

Click on ESPN in the legend to hide it from the graph and get a better sense of the competition.

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Whether or not one would consider the efforts a success is up for debate based on the Ratings data for the year to date; while neither FOX network nor NBCSN have come close to dethroning ESPN's ratings that consistently clock in above 0.5, save for one brief shining moment in June this year where, bolstered by its Stanley Cup Coverage snagging ratings averages of 0.493, NBCSN came within 0.1 of ESPN's then-low point on the year of 0.581. Aside from that bump, both NBCSN and FOX Sports 2 regularly clocked in below both ESPN 1 and 2, averaging 0.055 (NBCSN) and 0.20 (FS2) this past month as compared to ESPN 2's 0.319. However, FOX Sports 1 has done an exceptional job keeping pace with ESPN 2, particularly since the switch, as FOX Sports 1 has seen its ratings climb to a high of 0.254 this month. Clearly, while FOX Sports 1 has some ways to go, its re-branding strategies have seemed to bolster its efforts to be considered as a viable sports-news alternative for males in the coveted 25-54 demographic.

To this end, it's obviously too early to determine the long term prospects for these consolidation efforts, but it becomes clear that outside of the Stanley Cup Playoffs (the source of all of NBCSN's ratings spikes in the past few years), NBCSN still has trouble establishing the wide audience it wants as a competitor to ESPN. Furthermore, FOX sports 1 is still trying to figure out some of the kinks in how it wants to approach being a broad-sports network in the vein of ESPN, as evidenced by its recent move to cut an hour off of its SPORTSCENTER inspired FOX SPORTS LIVE in favor of more late night NASCAR programming. This kind of strategy could pay off, however, by allowing for a bit more programming diversity that could separate FOX Sports 1 from ESPN. For now, however, it seems as though it's going to take a while for any re-branding efforts to pose a tangible threat to ESPN's dominance.

### Cable Sports Networks Compared - Average M25-54 Live+SD Ratings, 2013

Originator	M25-54 Rtg	M25-54 US AA (000s)
ESPN	0.6	323
ESPN2	0.2	93
NFL NETWORK	0.1	54
FOX SPORTS 1	0.1	43
NBC SPORTS NETWORK	0.1	34
ESPNEWS	0.1	30
GOLF CHANNEL	0.1	30
MLB NETWORK	0.0	25
NBA-TV	0.0	21
ESPNU	0.0	18
FOX SOCCER	0.0	12
FOX SPORTS 2	0.0	11

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