



# KEY EVENTS ON FS1 IN 2016



# WHAT'S OUR PLAN FOR STUDIO SHOWS?



# THE EVOLUTION OF SPORTS NEWS AND INFORMATION

Pre 1979



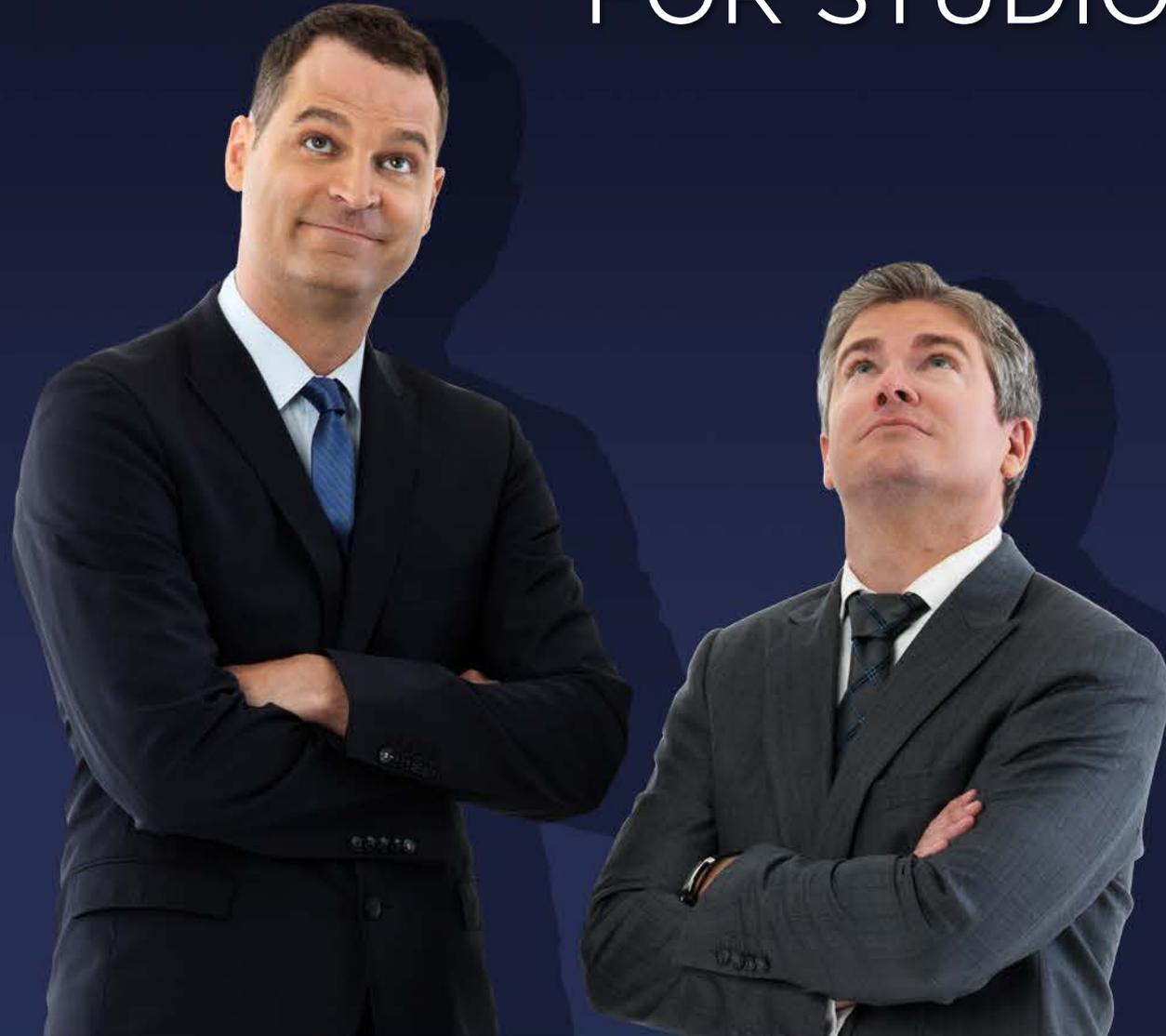
1979-2000s



Now



# BUT **WHAT DOES THAT MEAN** FOR STUDIO SHOWS?



# SIX YEAR SPORTSCENTER TREND

P2+ (000) from 2010 to 2015

740



552

**-25% since 2010**

2010

2011

2012

2013

2014

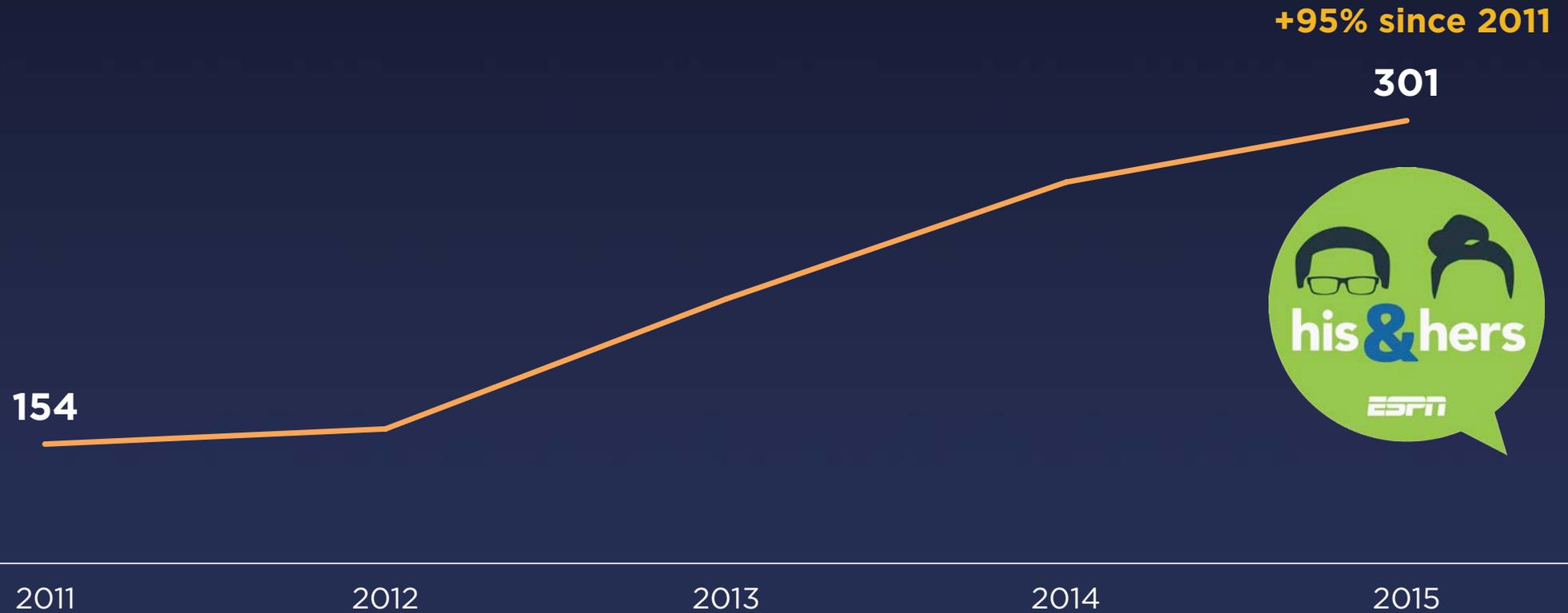
2015

IS THIS BECAUSE  
**TOTAL TV VIEWING**  
**IS DOWN?**  
OR IS THIS A  
**SC PROBLEM?**



# FIVE YEAR HIS AND HERS TREND

P2+ (000) from 2010 to 2015



# 6 YEAR FIRST TAKE TREND

P2+ (000) from 2010 to 2015



# LIVE FT OUTRATES LIVE SC

■ SportsCenter

■ First Take

380,000



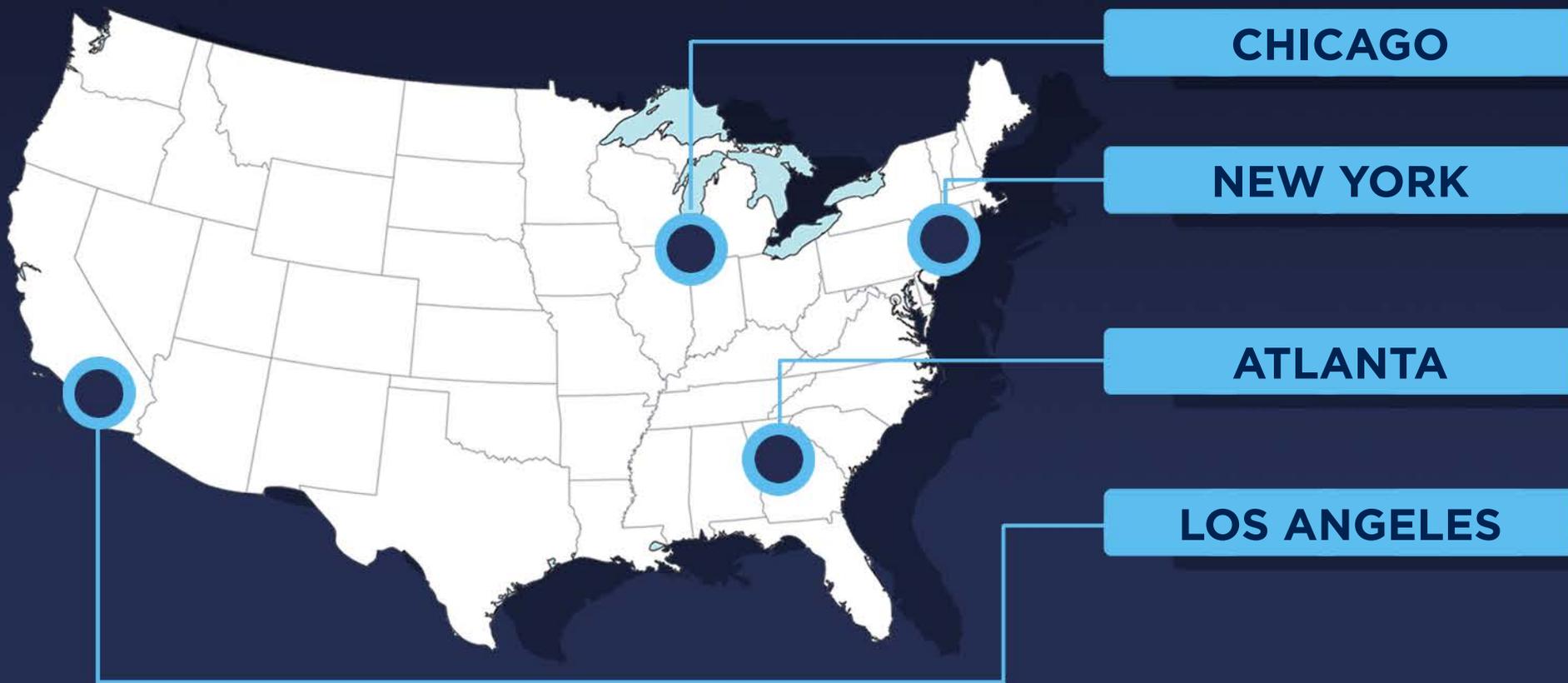
420,000



CLEARLY, THE **TYPE OF CONTENT**  
SPORTS FANS WANT  
ON TV IS **CHANGING**



TO LEARN A LITTLE MORE ABOUT  
**WHAT FANS WANT,**  
WE WENT ON A ROAD TRIP!



# THE FANS **TOLD US IN WORDS** WHAT THE *NUMBERS* HAVE BEEN INDICATING



# FANS ARE WATCHING LESS NEWS-DRIVEN, HIGHLIGHT-FOCUSED PROGRAMMING...



*“I’m definitely watching less SportsCenter. that sort of thing was the only way to get my sports news before I had a smartphone. now, I’m getting it quicker on my phone than they can even put it out on TV. it’s old news by the time it airs.”*

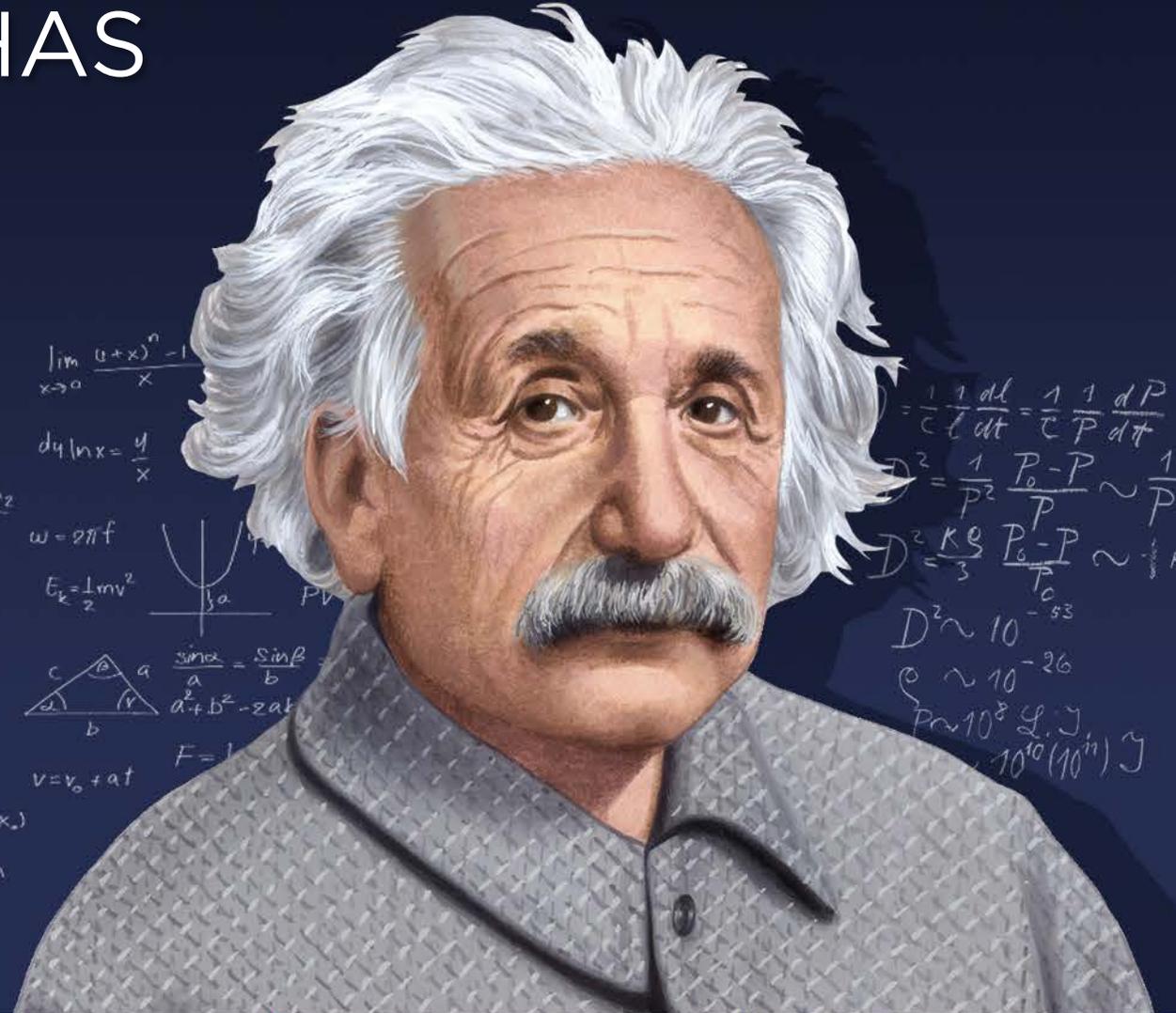
# ...AND MORE PERSONALITY-DRIVEN, OPINION PROGRAMMING



*“I watch a lot more of the opinion and debate shows... I already know what happened, so I want to hear people talk about it.”*



# HEADLINES AND HIGHLIGHTS ARE **STILL IMPORTANT** ...BUT THE FORMULA HAS **CHANGED**



$$Q = mc\Delta T$$



$$P = IV = \frac{V^2}{R} = I^2 R$$

$$F = \frac{G m_1 m_2}{r^2}$$

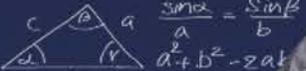
$$\omega = 2\pi f$$

$$E_k = \frac{1}{2} m v^2$$

$$PV = nRT$$



$$v = f\lambda$$



$$v = v_0 + at$$

$$v^2 - v_0^2 = 2a(x - x_0)$$

$$\Delta P = \rho g \Delta h$$

$$T = \frac{2\pi}{\omega}$$

$$\lim_{x \rightarrow 0} \frac{(1+x)^n - 1}{x}$$

$$d_y \ln x = \frac{1}{x}$$



$$\frac{1}{c} \frac{dI}{dt} = \frac{1}{c} \frac{dP}{dt}$$
$$D^2 = \frac{1}{P^2} \frac{P_0 - P}{P} \sim \frac{1}{P^2}$$
$$D^2 = \frac{kg}{3} \frac{P_0 - P}{T_c} \sim \frac{1}{3} kg$$

$$D^2 \sim 10^{-53}$$

$$e \sim 10^{-26}$$

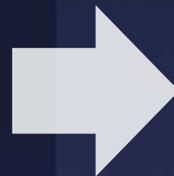
$$P \sim 10^8 \text{ J} \cdot \text{y}$$
$$10^{10} (10^{11}) \text{ J}$$

# FANS ARE CRAVING **A NEW RECIPE**



## THE OLD RECIPE WAS...

headlines + highlights with  
*some* personality and  
perspective



## THE NEW RECIPE IS...

personality and perspective  
*about* the headlines +  
highlights

SO WHAT IS  
**PERSONALITY AND PERSPECTIVE**  
...BESIDES GOOD ALLITERATION?



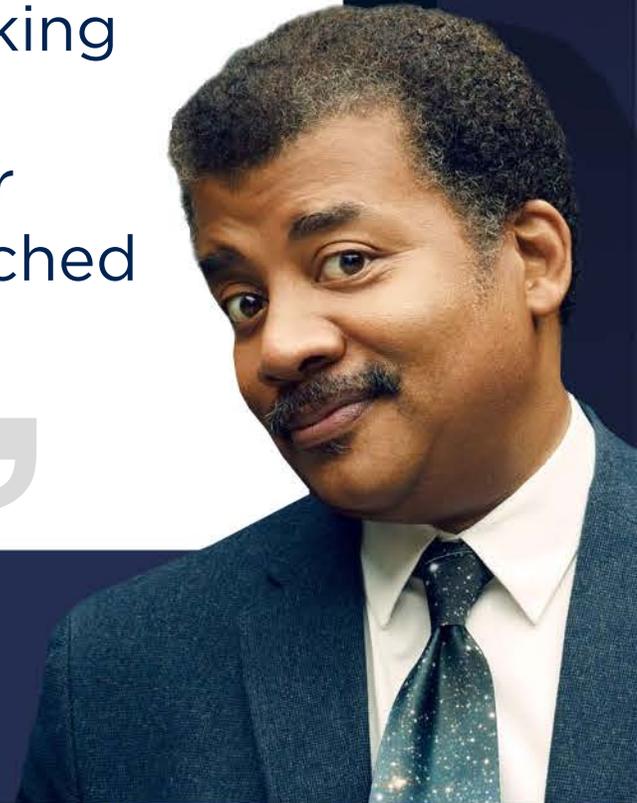
## PERSONALITY

“ The hosts talk the way your smart friends talk. It’s less like a lecture, and more like a bar conversation. More accessible. ”



## AUTHORITY

“ The hosts know what they’re talking about. They tell the story in their own well researched voice, and drive the editorial. ”



# SO WE KNOW THE FORMULA...

ISN'T ESPN OFFERING THAT TOO?



# THE PORTFOLIO EFFECT: HOW WE'RE DIFFERENT



VS



VS



VS



# WHAT FANS WANT

IN A DAILY STUDIO SHOW IS IN OUR DNA

A word cloud of adjectives describing fan preferences. The words are arranged in a cluster, with 'fearless' being the largest and most central. Other prominent words include 'risk taking', 'original', 'blunt', 'defiant', 'provoking', 'thought', 'independent', 'smart', 'rebellious', and 'relentless'. The words are in various colors: white, orange, teal, and light green.

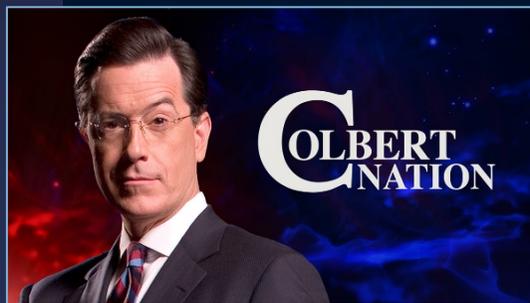
original  
blunt  
risk taking  
independent smart  
fearless  
thought defiant rebellious  
provoking  
relentless

# SPECIFIC, FEARLESS, INSIGHTFUL STUDIO SHOWS

Fox News



Comedy Central



HBO



# WHAT ABOUT ESPN?



10:16 ET  
LIVE

YANKEES  
DODGERS

TIGER  
WOODS

D-BACKS  
RAY

STEELERS

DEREK  
JETER

INDIANS  
RED SOX

CELTICS  
LAKERS

2008 NBA PLAYOFFS  
SEMI FINALS

F/OT  
**CELTICS** 109  
**LAKERS** 82

BOS: 21-32 LAL: 21-32

CELTICS  
Pierce: 20 Pts, 7 Rebs, 4 TO  
R. Allen: 18 Pts, 11 Ast

LAKERS  
Bryant: 40 Pts, 8 Rebs, 4 Ast  
21 Pts in 3rd quarter

NBA / COMCAST SPORTS NET WEST

MLB NYY 3 CLE 5 19 OUT NYN AT BAT

ESPN HD

A large screen in the foreground shows a basketball game in progress. A player in a white jersey with the number 5 is visible. The background of the screen shows a crowd of spectators.

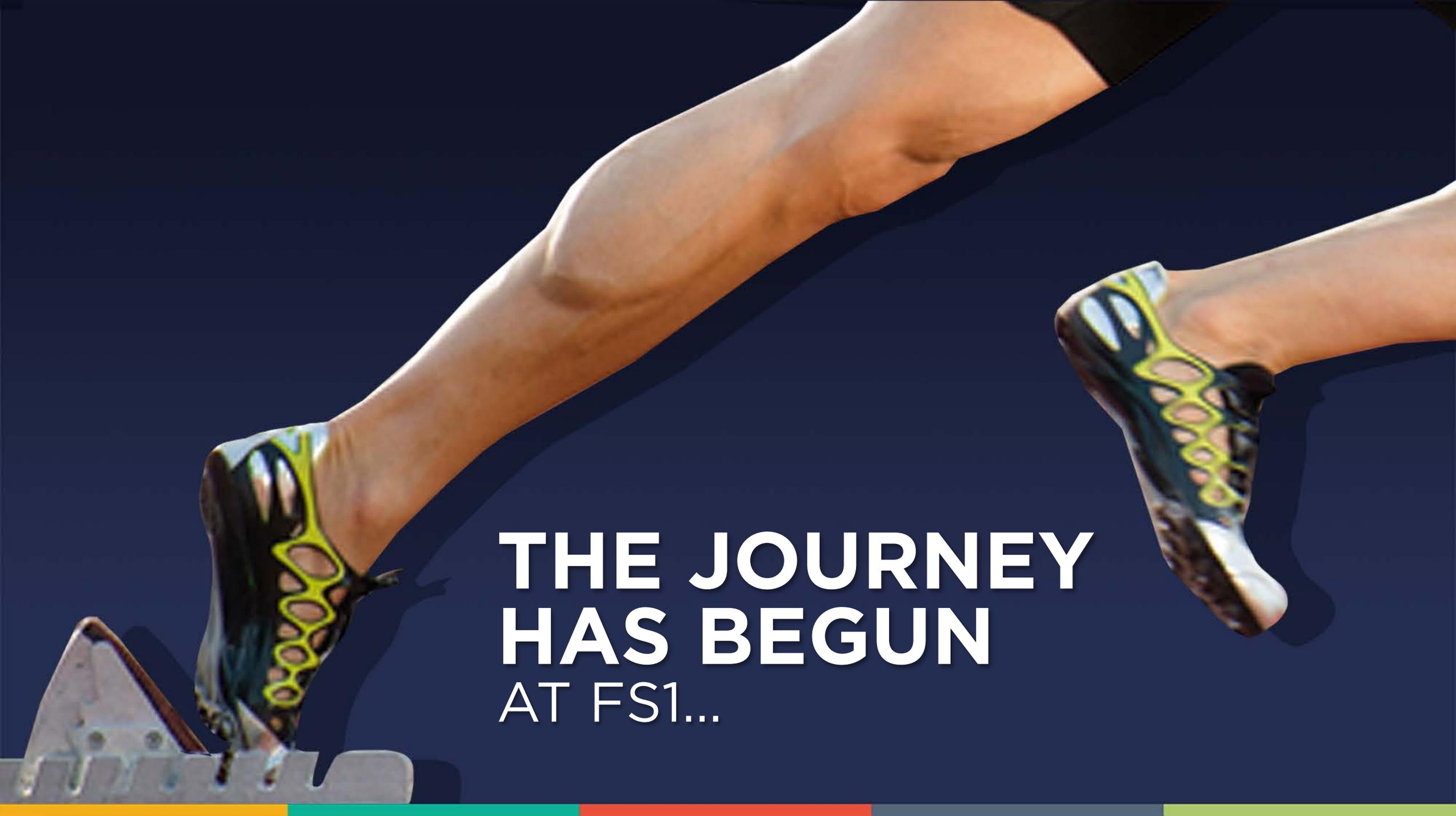
# A RENEWED COMMITMENT ...TO SPORTSCENTER?

**DC2- a +\$100M  
INVESTMENT**

**3 MORE LIVE  
HOURS**

**OVER 50% OF  
FLAGSHIP ESPN  
SCHEDULE  
IS SC**

**SPORTSCENTER**



**THE JOURNEY  
HAS BEGUN**  
AT FS1...

STAGE  
**B**

# **THE HERD**

WITH **COLIN COWHERD**

THAT'S A  
CELEB  
GR



LEDRI  
DAILY  
GRATE  
RALLY  
GRAND



VIDEO



**GARBAGE  
TIME** WITH  
KATIE  
NOLAN

**GARBAGE  
TIME** WITH  
KATIE  
NOLAN

VIDEO

# WE ARE FURTHER DEFINING THE DISRUPTIVE ALTERNATIVE



**FS1**