



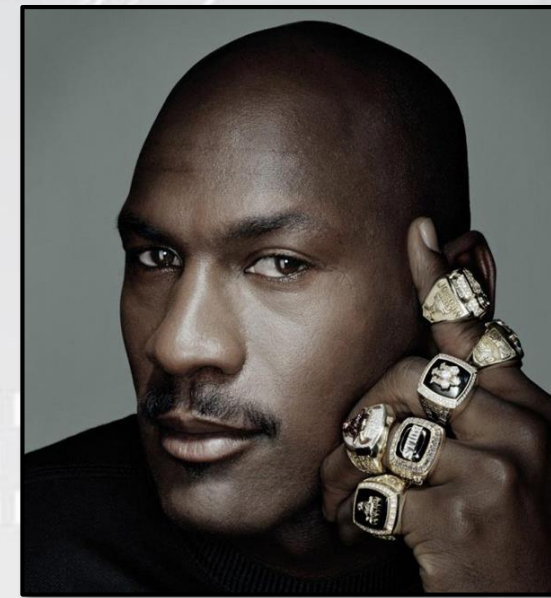
DIGITAL CONTENT NEXT

01.22.15

ESPN Mission:
To serve sports fans.
Anytime. Anywhere.

ESPN

How many?



How often?

How long?

Final 6OT



(18) Syracuse 127
(25-8, 11-7 Big East)



(3) Connecticut 117
(27-4, 15-3 Big East)

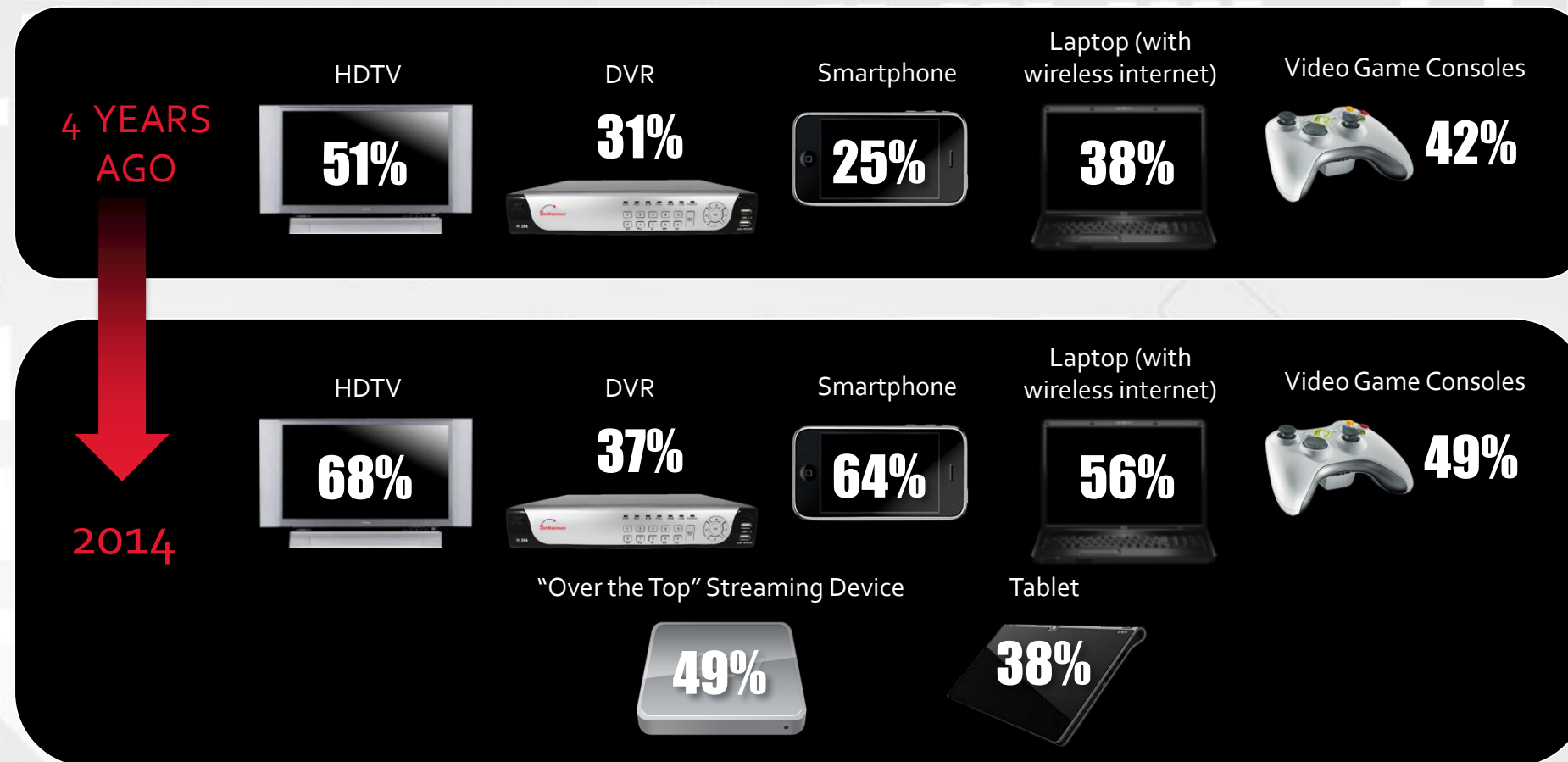
Watch Highlights

9:30 PM ET, March 12, 2009
Madison Square Garden, New York, New York

	1	2	OT	2OT	3OT	4OT	5OT	6OT	T
#18 SYR	34	37	10	6	11	6	6	17	127
#3 CONN	37	34	10	6	11	6	6	7	117

The Hyper Connected World

New technology enables incremental access and creates new strata of users



Source: Home Technology Monitor, US Households

New Markets of Time

Media usage is not a zero-sum game

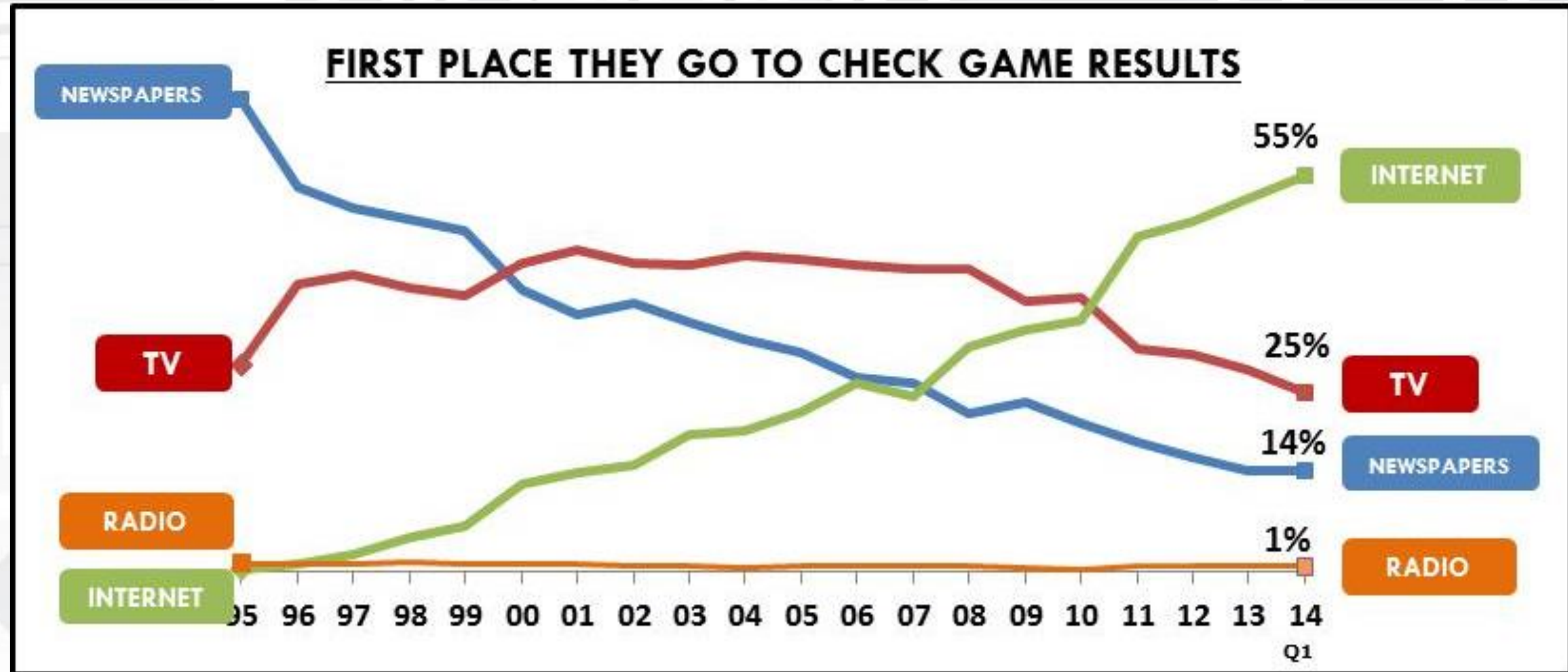
Hr:Min Per Day

	2010	2014	Change
All Media	10:35	10:57	3%
Television	5:10	4:36	-11%
Internet	2:32	3:17	30%
Radio	1:46	1:41	-5%
Newspaper	0:19	0:15	-21%
Magazine	0:15	0:12	-20%
Mobile	0:07	0:50	614%
Videogames	0:26	0:55	112%

Source: Knowledge Networks, Multimedia Mentor, Spring data

Digital News First

Sports fans claim digital as first source for sports news:

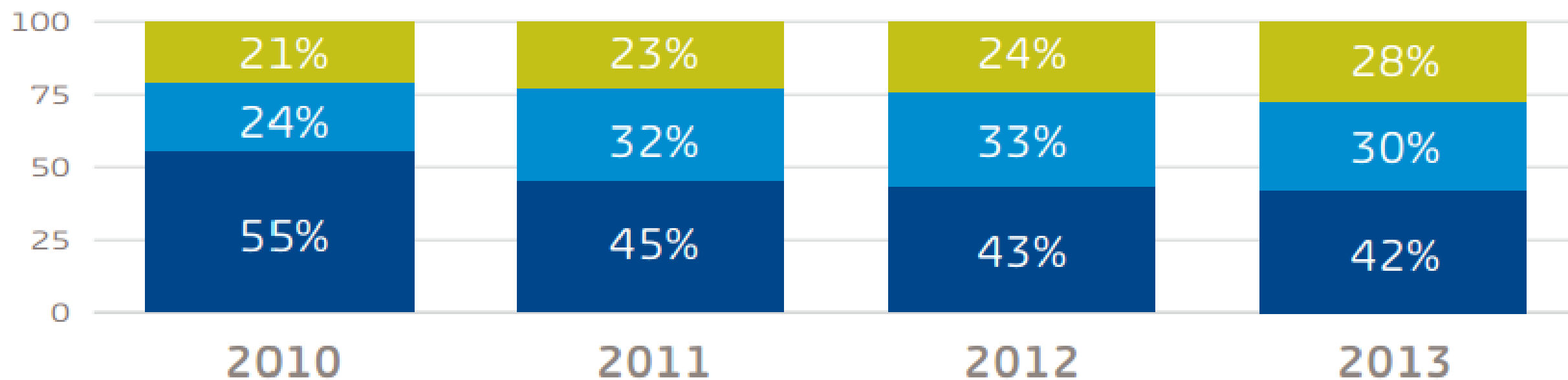


Source: ESPN Sports Poll

Only...Only...Both

ESPN cross platform Sports News use

■ TV only ■ Non-TV only ■ Both



Source: ESPN GfK Sports News & Information Study, 2013

Once Upon A Time...

We cared about one thing, and that thing was good

- ESPN.com was #1 in the sports category based on PC monthly unique visitors from the dawn of time* to July 2007 (*Feb 2002)

But then darkness swept the land

- August 2007 Yahoo! Sports ranked #1 for 1st time
- After 8 month battle, April 2008 they took PC category lead; did not relinquish for 53 months



So the people looked for a hero to save them

- Introduced series of major changes to how we evaluate ESPN performance:
 - 2008: **Total Minutes and Category Share**
 - 2009: **Average Minute Audience for ESPN.com**
 - 2010: **Average Minute Audience for all ESPN Digital Media**
 - 2012: **Multi-platform digital reporting**
 - 2013: **Cross-Platform event reporting**
 - 2014: **Daily reach, frequency and time spent**



***“There is research to know,
and research to show.”***

Ancient ESPN Research & Analytics Proverb

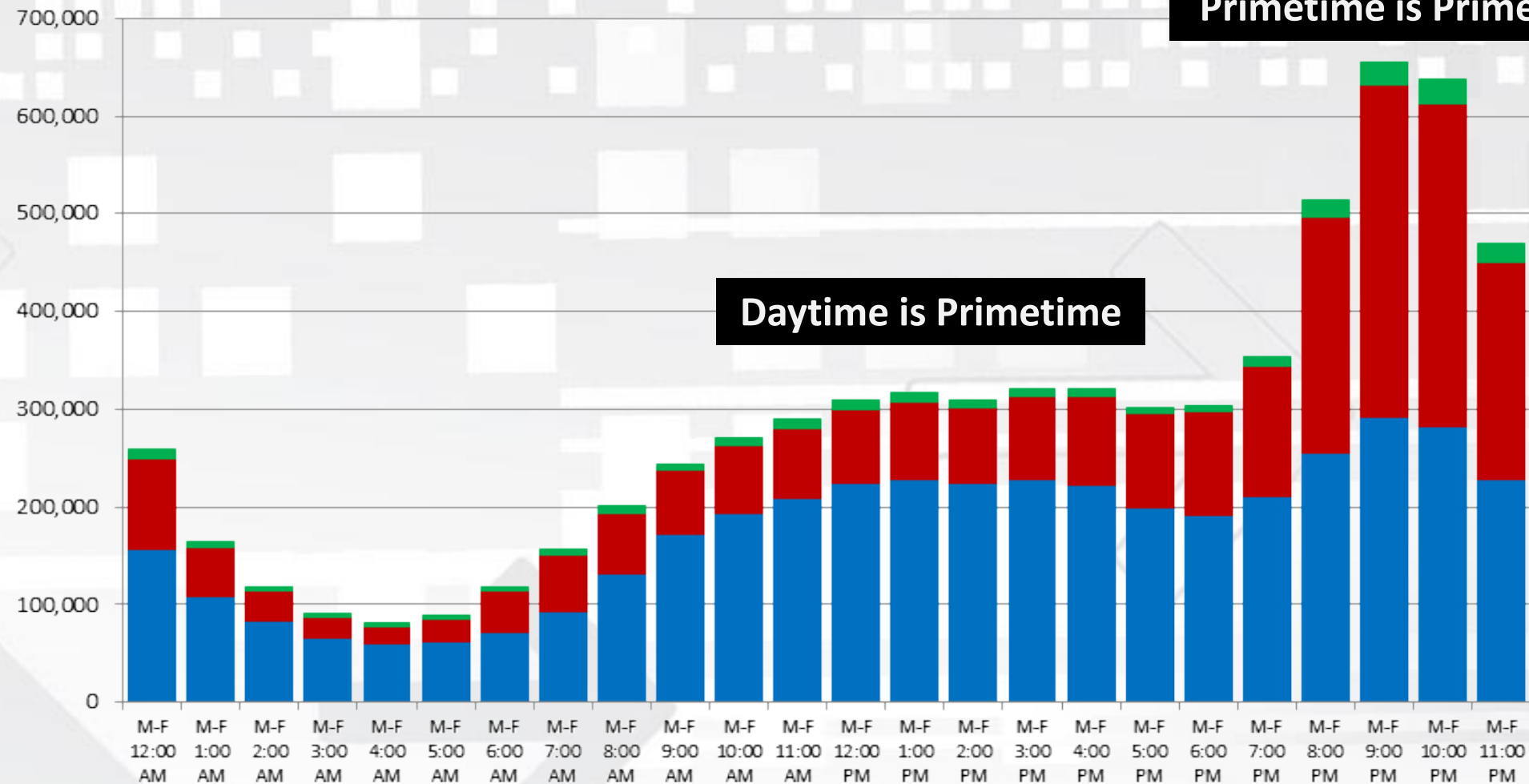
ESPN Digital X-Ray

Monday-Friday

■ WatchESPN ■ Mobile ■ PC

Primetime is Primetime

Daytime is Primetime



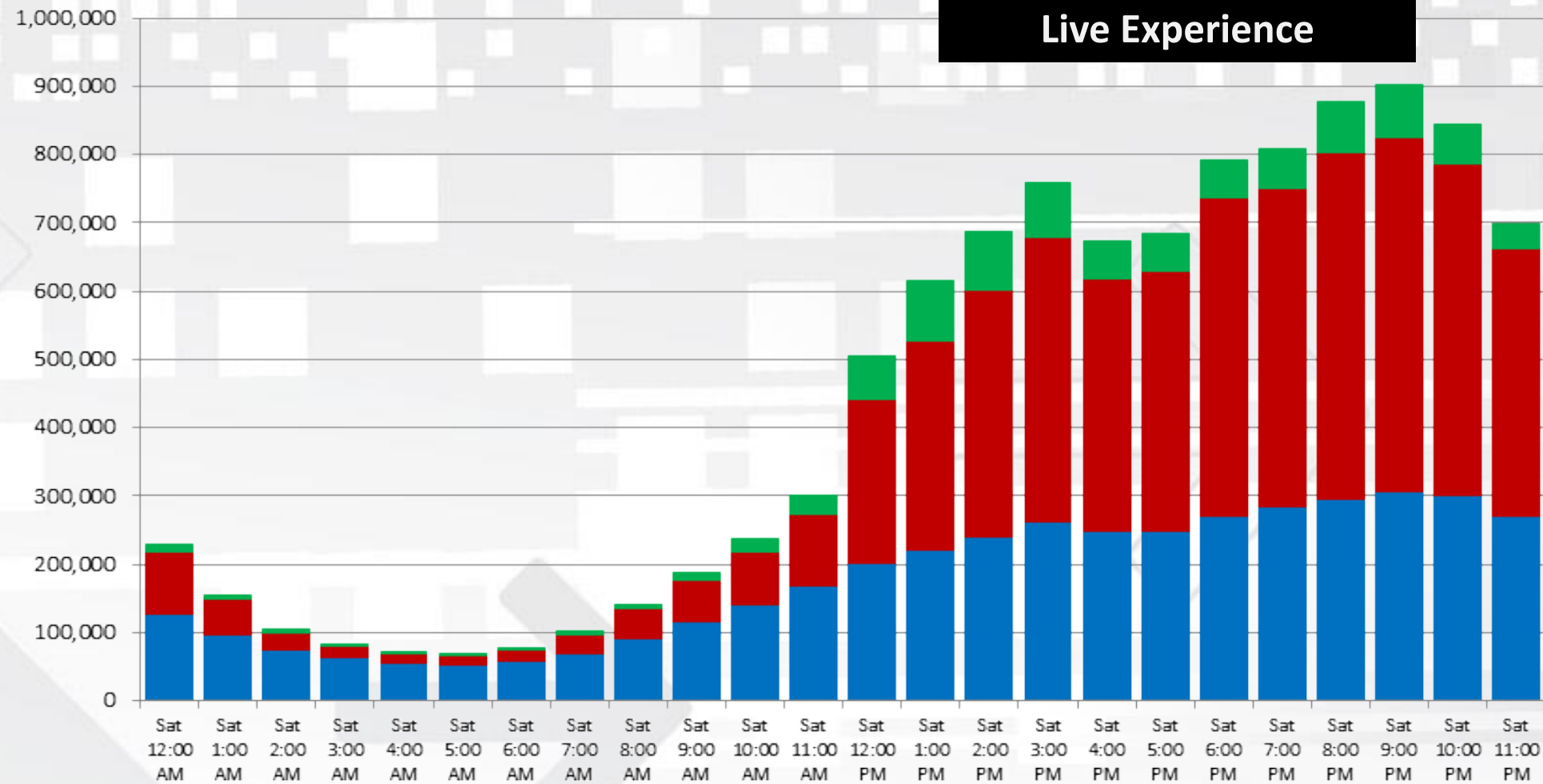
Source: Adobe Analytics, Average Minute Audience, 9/30/13-10/27/13

ESPN Digital X-Ray

Saturday

■ WatchESPN ■ Mobile ■ PC

Live Experience

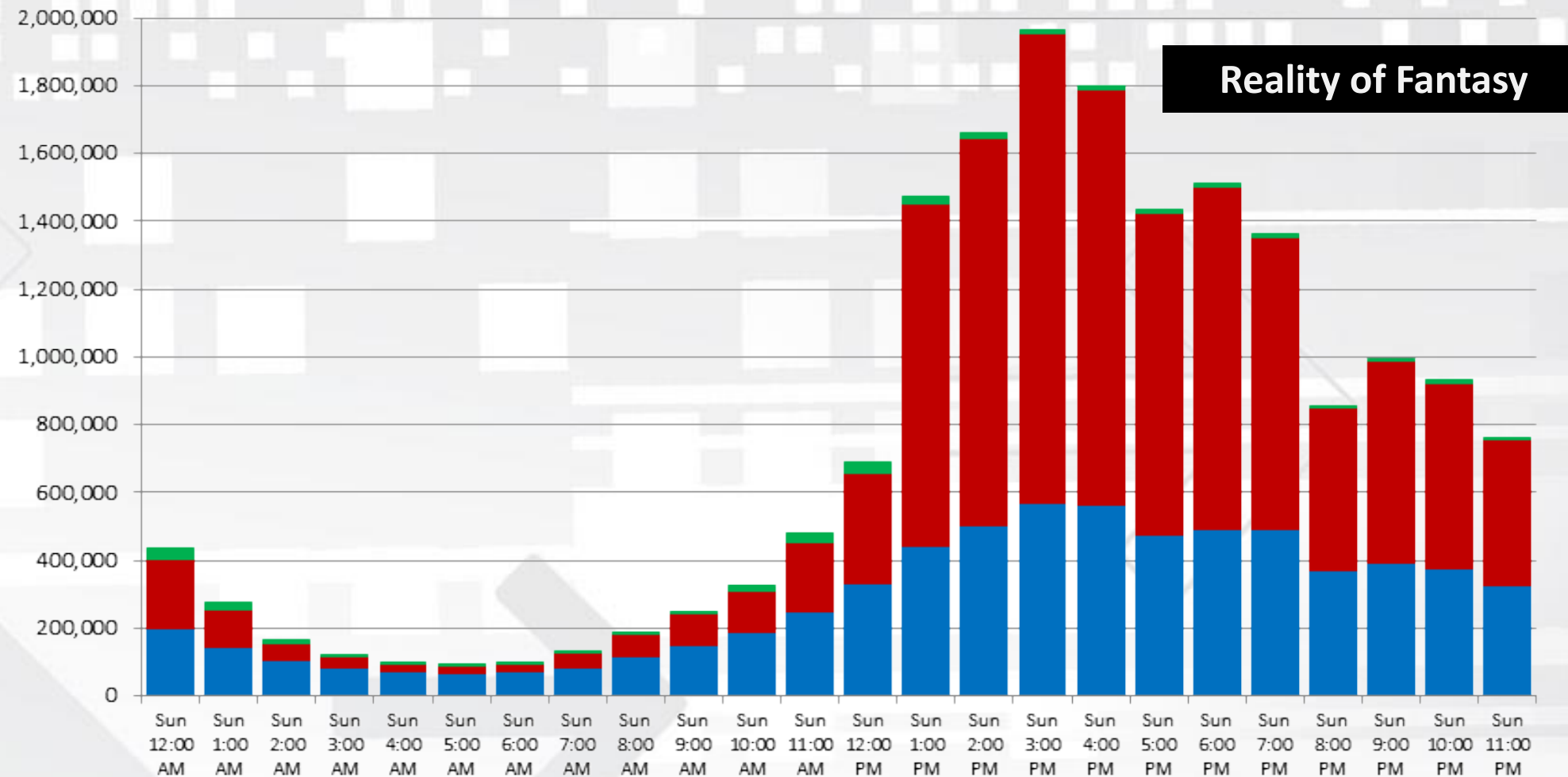


Source: Adobe Analytics, Average Minute Audience, 9/30/13-10/27/13

ESPN Digital X-Ray

Sunday

■ WatchESPN ■ Mobile ■ PC



Source: Adobe Analytics, Average Minute Audience, 9/30/13-10/27/13

- **How many? How often? How long?**
- **Technology adoption & media usage has changed radically**
- **Dynamics of sports news consumption are evolving**
- **ESPN introduced series of KPIs focused on attention-metrics**
- **Data impacts how ESPN builds, programs, markets, distributes & sells**



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