



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

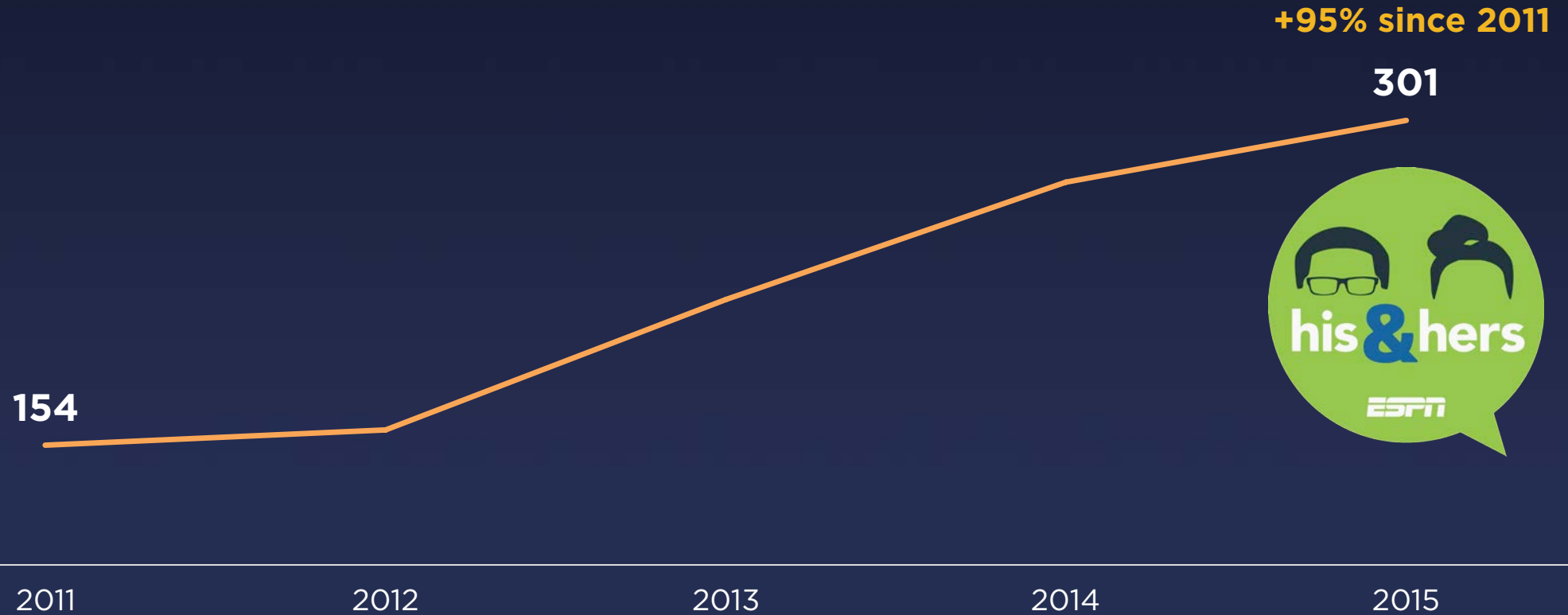
2015

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

+48% since 2010

283

419



2010

2011

2012

2013

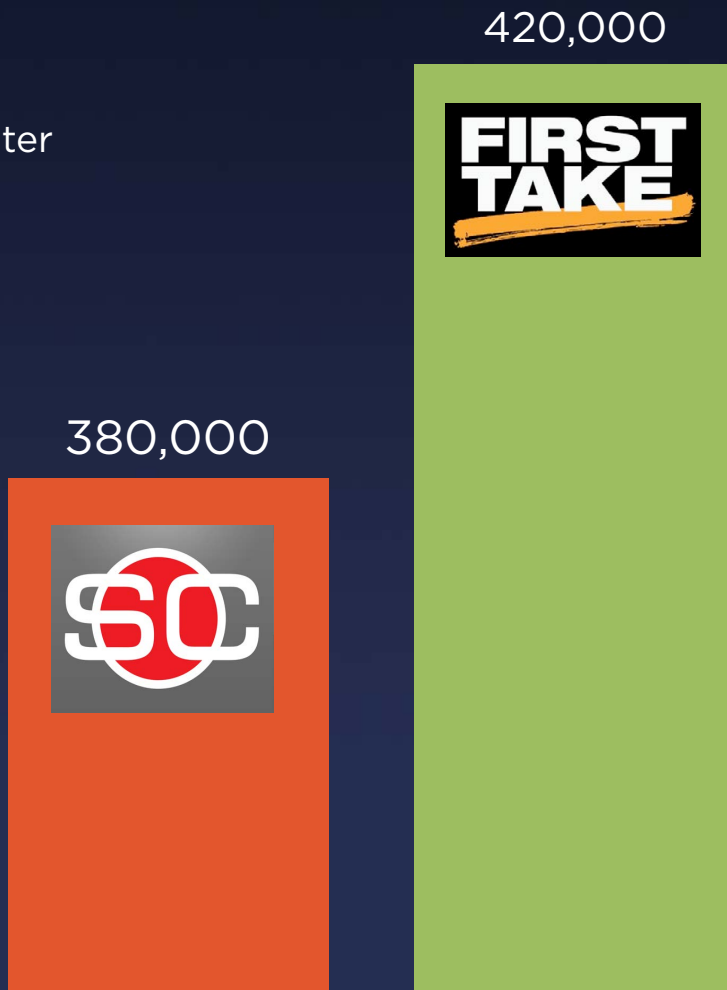
2014

2015

LIVE FT OUTRATES LIVE SC

■ SportsCenter

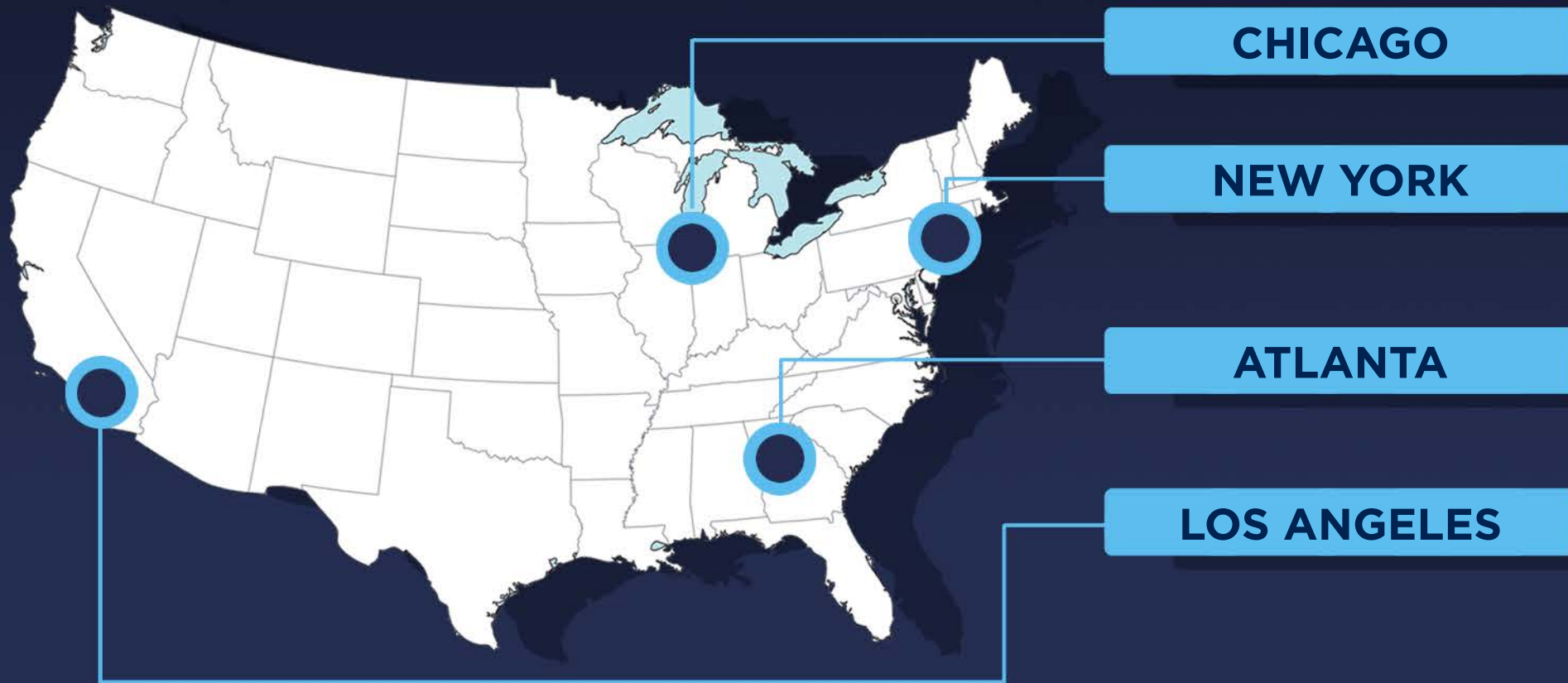
■ First Take



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."

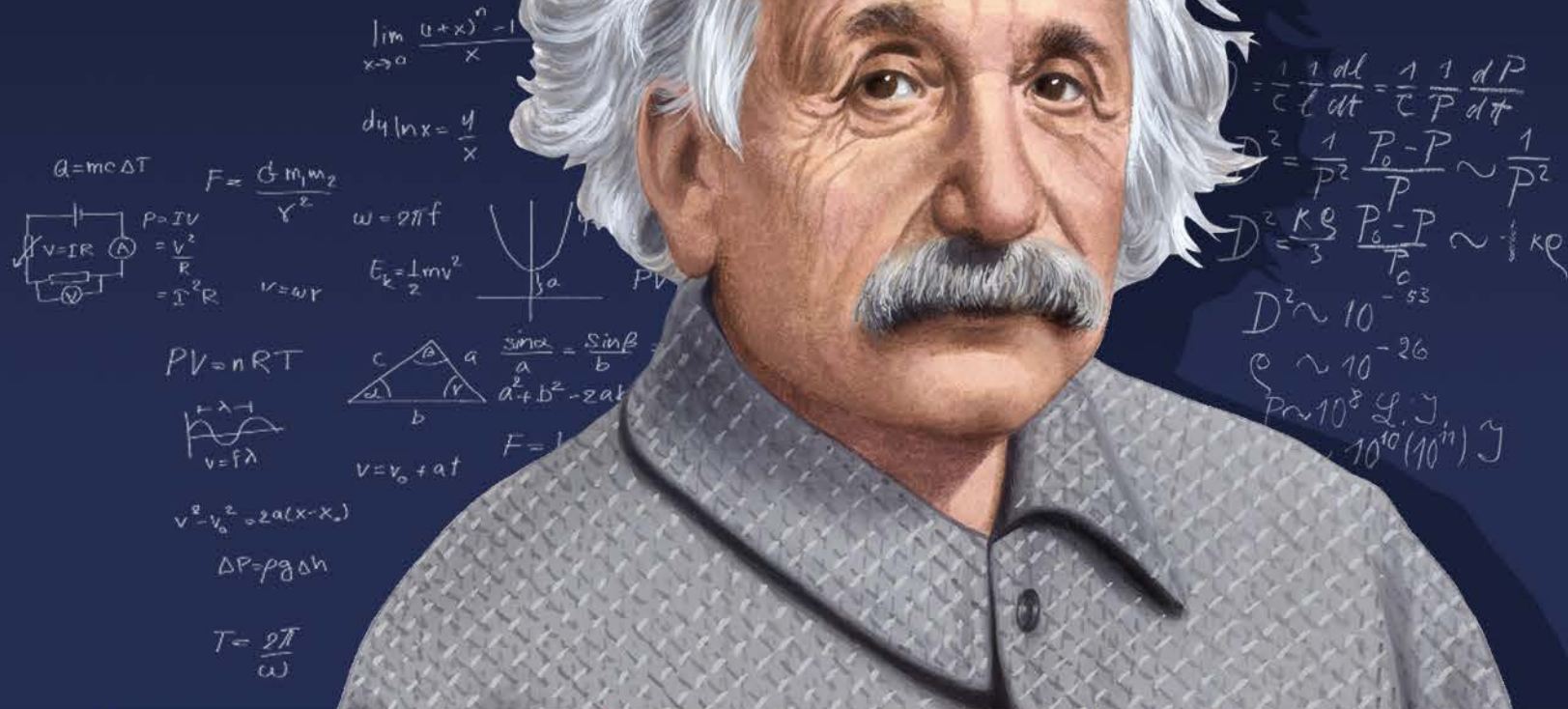
...AND MORE PERSONALITY-DRIVEN, OPINION PROGRAMMING



"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



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.

”

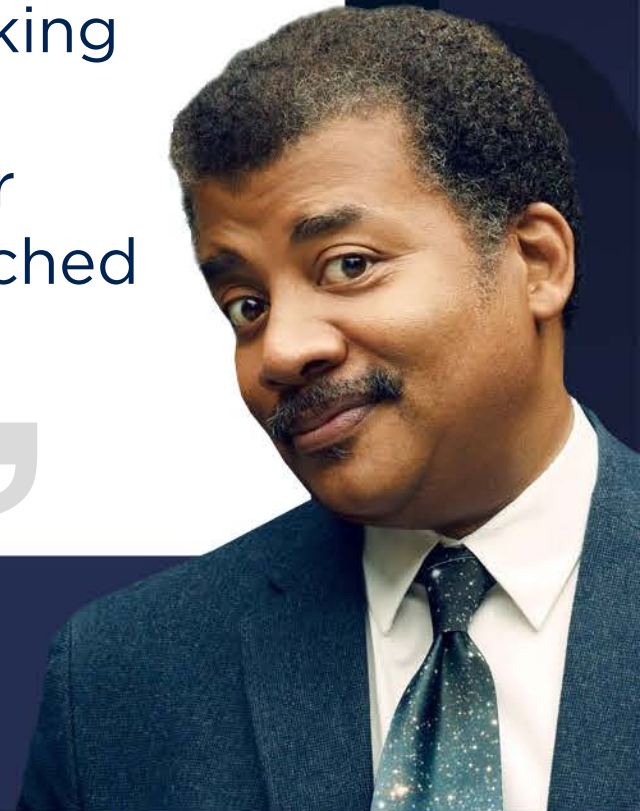


AUTHORITY

“

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 centered on the image, featuring various adjectives in different colors and sizes. The words are arranged in a way that some are horizontal, some vertical, and some diagonal. The colors include white, orange, teal, green, and grey. The words are: original, blunt, risk taking, independent, smart, fearless, relentless, thought, defiant, rebellious, and provoking.

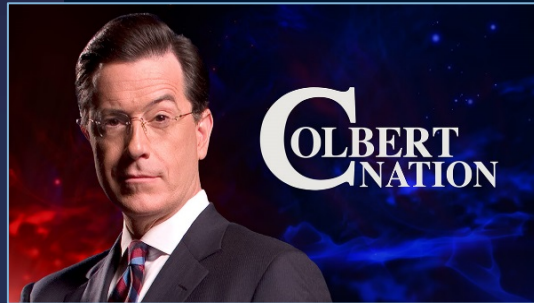
original
blunt
risk taking
independent
smart
fearless
relentless
thought
defiant
rebellious
provoking

SPECIFIC, FEARLESS, INSIGHTFUL STUDIO SHOWS

Fox News



Comedy Central



HBO



WHAT ABOUT ESPN?



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



CELEBRATE
RARELY.
DAILY
CELEBRATE
RARELY.
GRAND

VIDEO

A woman with long brown hair, wearing a dark blue sweater over a light blue collared shirt, is smiling and looking towards the camera. She is standing in front of a brick wall. To her left, there is a shelf with various sports memorabilia, including a yellow Boston Bruins logo, a pair of hockey gloves, and a green sign that says "NO SPIKES". To her right, a large black sign with white and blue text is mounted on the wall.

GARBAGE TIME

WITH
KATIE
NOLAN

A blue rectangular overlay with a white pixelated grid pattern. The text "GARBAGE TIME" is written in large, bold, white capital letters. To the right of "GARBAGE TIME", the words "WITH KATIE NOLAN" are written in smaller, yellow, pixelated capital letters.

GARBAGE TIME

WITH
KATIE
NOLAN

VIDEO

WE ARE FURTHER DEFINING **THE DISRUPTIVE ALTERNATIVE**



FS1