



How Cross-Platform Media Usage Drives Overall ESPN Listening

OVERVIEW

With the growing amount of listening platforms and content continuously growing, there is a tendency to feel that people are shifting how they listen, from one platform to another. However, an ESPN-driven study shows that by sampling more content on more platforms, people listen to more ESPN, not less!

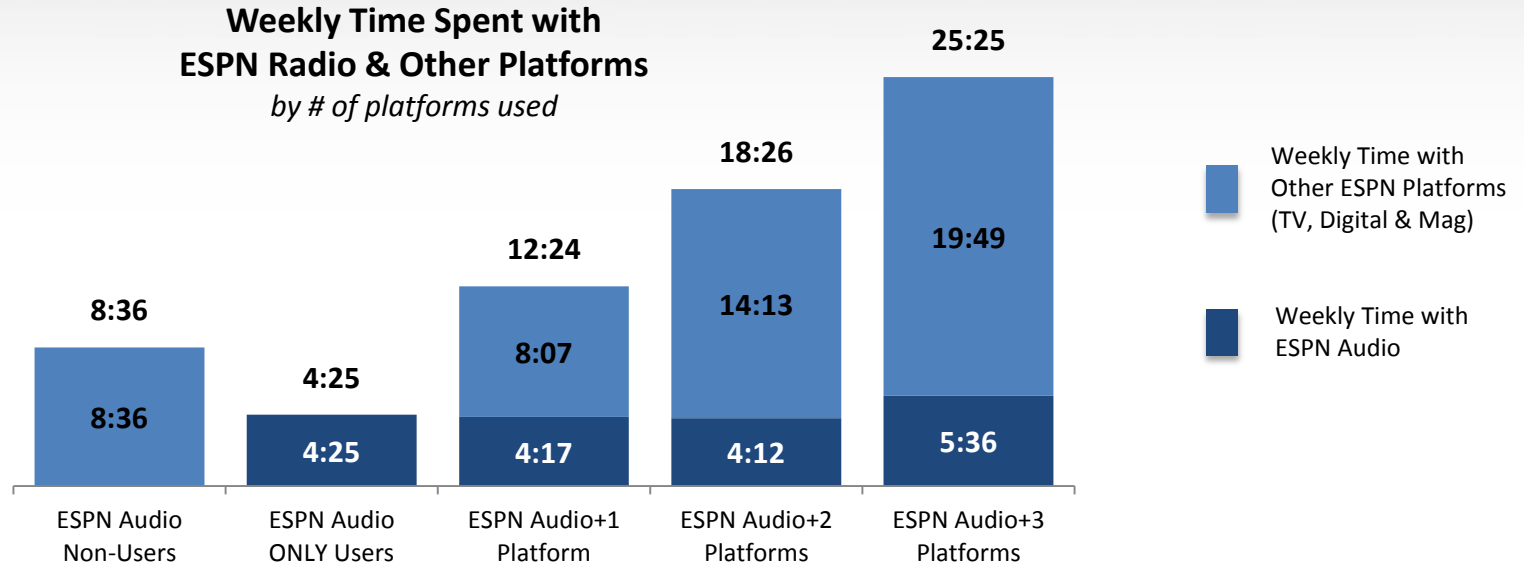
The media “pie” in how people listen actually grows instead of shifting from one platform to another – they take time away from other areas of their life in order to consume more!

In fact, people who listen to ESPN Radio (or stream/listen to podcasts) plus use 3 other ESPN platforms (TV, online or the magazine) spend more time with ESPN audio content than any of the other combination of listening - ~5.5 hrs/week, on top of the ~20 hrs/week spent with other ESPN content.

Source: Fall 2015 ESPN All Day Every Day, P13-64 ESPN Audio Weekly Users

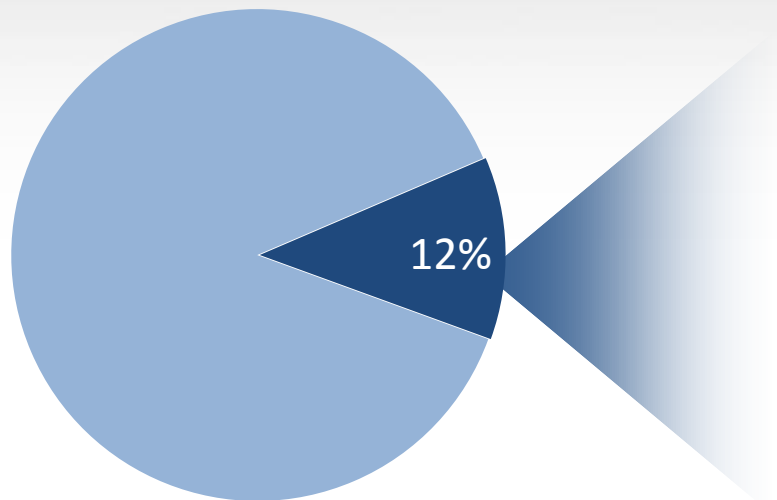
THE MORE ESPN PLATFORMS FANS USE, THE MORE ENGAGED THEY BECOME

As mobility continues to drive consumption, the media “pie” is getting larger and allows people to consume media throughout the day, wherever they are, which leads to “New Markets of Time”.

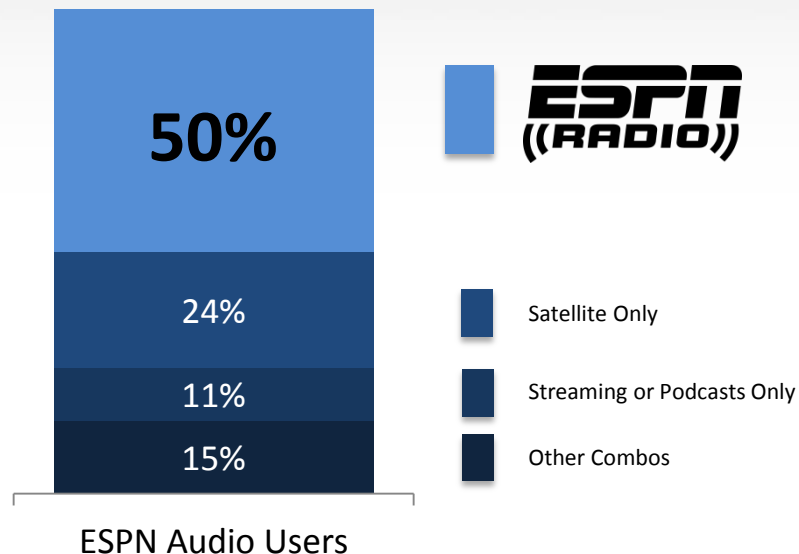


ESPN RADIO DOMINATES AMONG PLATFORM CHOICES

% of Total P13-64 Who Use ESPN Audio Weekly



Breakdown of Users By Platform Used (Weekly)

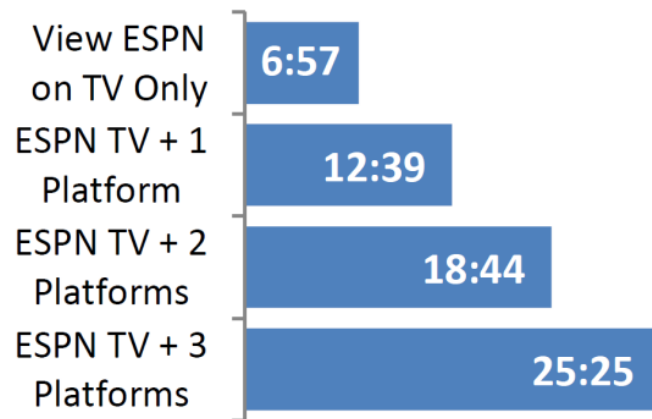


BUT THE MORE ESPN A PERSON CONSUMES, THE MORE TIME THEY SPEND WITH THE BRAND

Fans NEED the ESPN brand – each week, they watch:

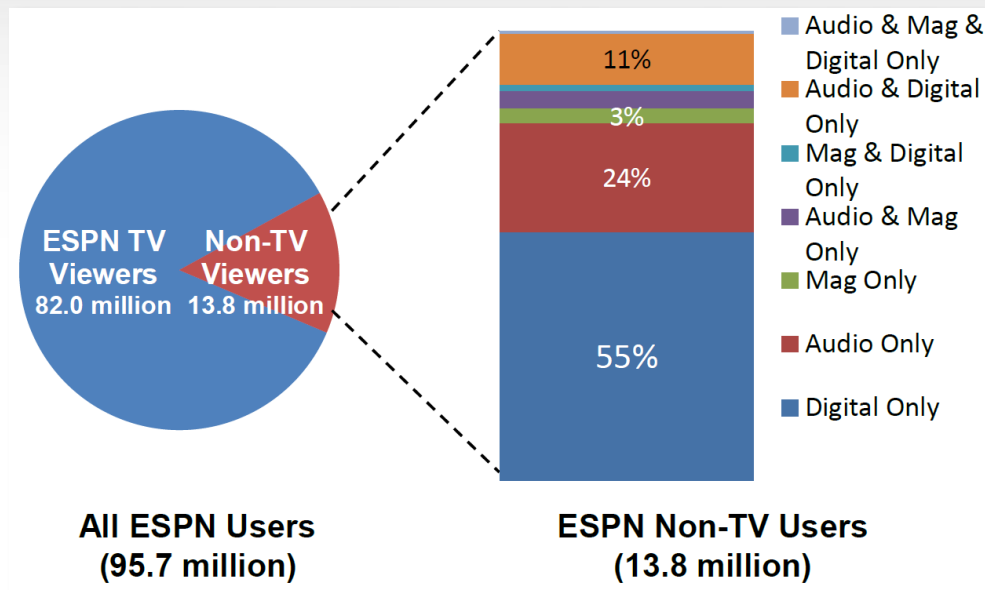
- ESPN on TV only... 6 hours 57 minutes
- + 1 platform... 12 hours 39 minutes
- **+ 3 platforms... over 25 hours per week!!!**

Total Weekly Time Spent with ESPN Media (h:mm)



SAMPLING CONTENT DRIVES THEM TO LISTEN MORE, NOT SWITCH HOW THEY LISTEN

Of all ESPN users, 13.8 million of them (**14%**) consumed ESPN **only** on non-TV platforms - a full **24%** of those users **only** listen to ESPN Radio, whereas **18%** listen to radio and another non-TV platform



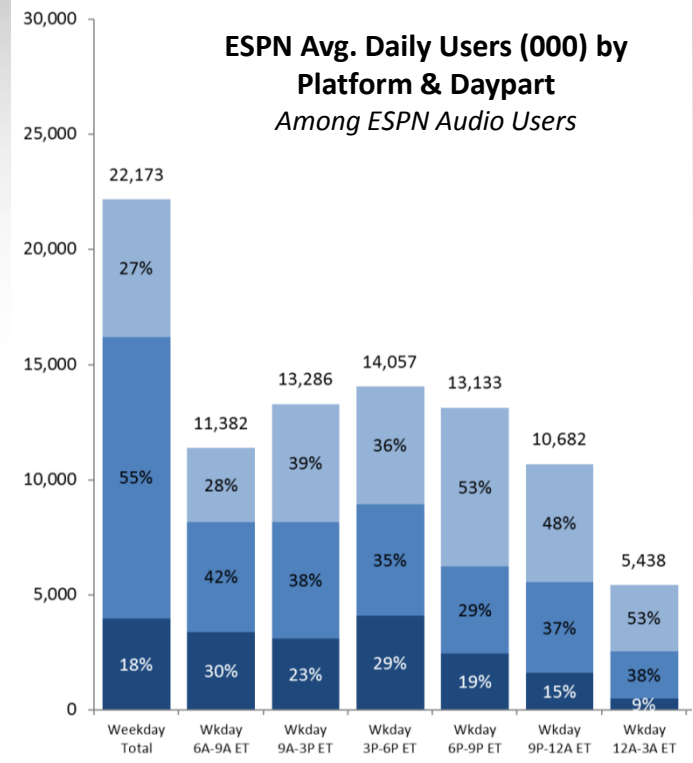
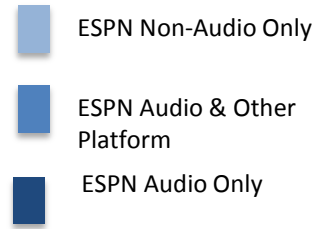
HEAVY USERS OF ONE ESPN PLATFORM TEND TO BE HEAVY USERS OF OTHER ESPN PLATFORMS TOO

Heavy listeners of ESPN Radio (and streaming/podcasting) spent nearly 4 hours more with ESPN Digital, while heavy ESPN Digital users listened to ESPN Radio, streaming or podcasts over 6x more per week *and* watched ESPN on TV for 9.5 hours more than on average.

Weekly Time Spent Fall 2015	P13-64 h:mm	Heavy ESPN TV	Heavy ESPN Digital	Heavy ESPN Audio	Heavy All ESPN
All ESPN	4:43	27:39	26:09	30:22	26:11
ESPN TV Nets	3:16	22:04	12:46	12:01	18:31
ESPN Digital	0:48	3:16	9:42	4:33	4:20
ESPN Audio	0:32	2:08	3:15	13:07	2:48
ESPN the Mag	0:06	0:11	0:25	0:41	0:31

FANS ARE ENGAGING WITH ESPN WHENEVER THEY CAN, WHEREVER THEY CAN

Listeners are most likely to be listening to ESPN Radio, streaming or podcasts during the weekday



SPORTS FANS WANT ESPN IN DIFFERENT WAYS THAN THEY USED TO - NOT JUST ON TV

As consumers become more mobile and programming choices grow, they no longer have to ONLY watch ESPN – in 2015 only 37% of persons just watched ESPN TV (down 30% from 2002)

- P13-64 consuming ESPN on more than one platform increased by +20% since 2002
- The pie has grown how they consume ESPN, with 14% consuming the brand ONLY on non-TV platforms, like radio

