

NAVIGATING THE NUMBERS

Using Data to Identify Trends and Best
Practices in Collegiate Athletics

1.

**THE NAVIGATE
TEAM & OUR
CLIENTS**

2.

**SETTING THE
STAGE: COLLEGE
VS. PRO**

3.

**FUTURE OF
TELEVISION &
VIDEO**

4.

**SHIFTING TO
SOCIAL, DIGITAL
& MOBILE**

5.

**FAN EXPERIENCE
& TICKETING
INSIGHTS**

As a selective, boutique agency, Navigate is able to dedicate members of its senior team to our clients and collaboratively strategizes on critical business decisions that drive revenue and efficiencies.



AJ MAESTAS
Founder & CEO



JEFF NELSON
President



KELLI WILLIAMS
SVP, Consumer Insights



MATT BALVANZ
SVP, Analytics

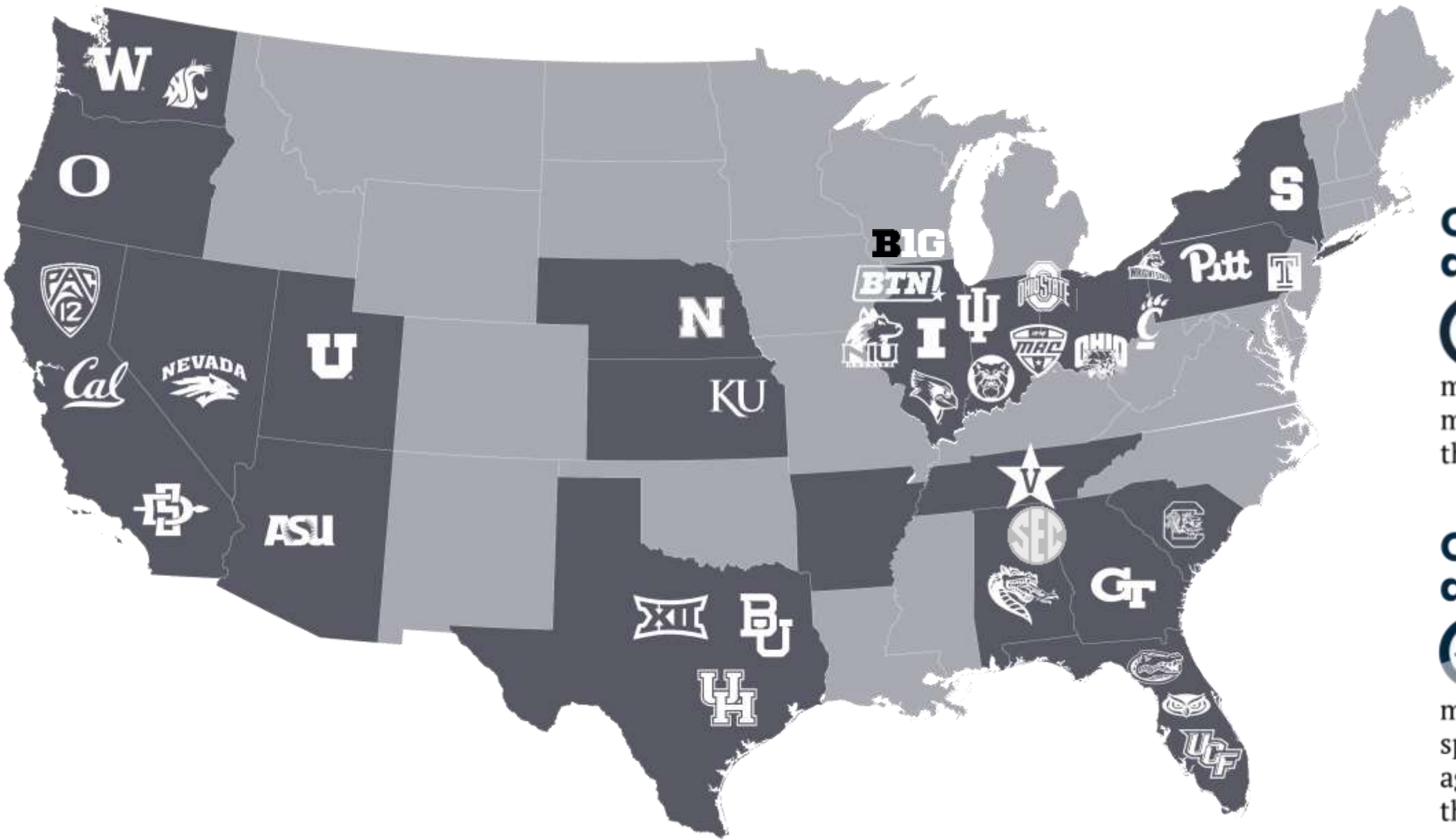


JORDAN BLOEM
VP, Client Strategy



PHIL OFILI
Head of Client Services - East





Our clients average...

 **60%**

more revenue on multimedia rights than their peers.

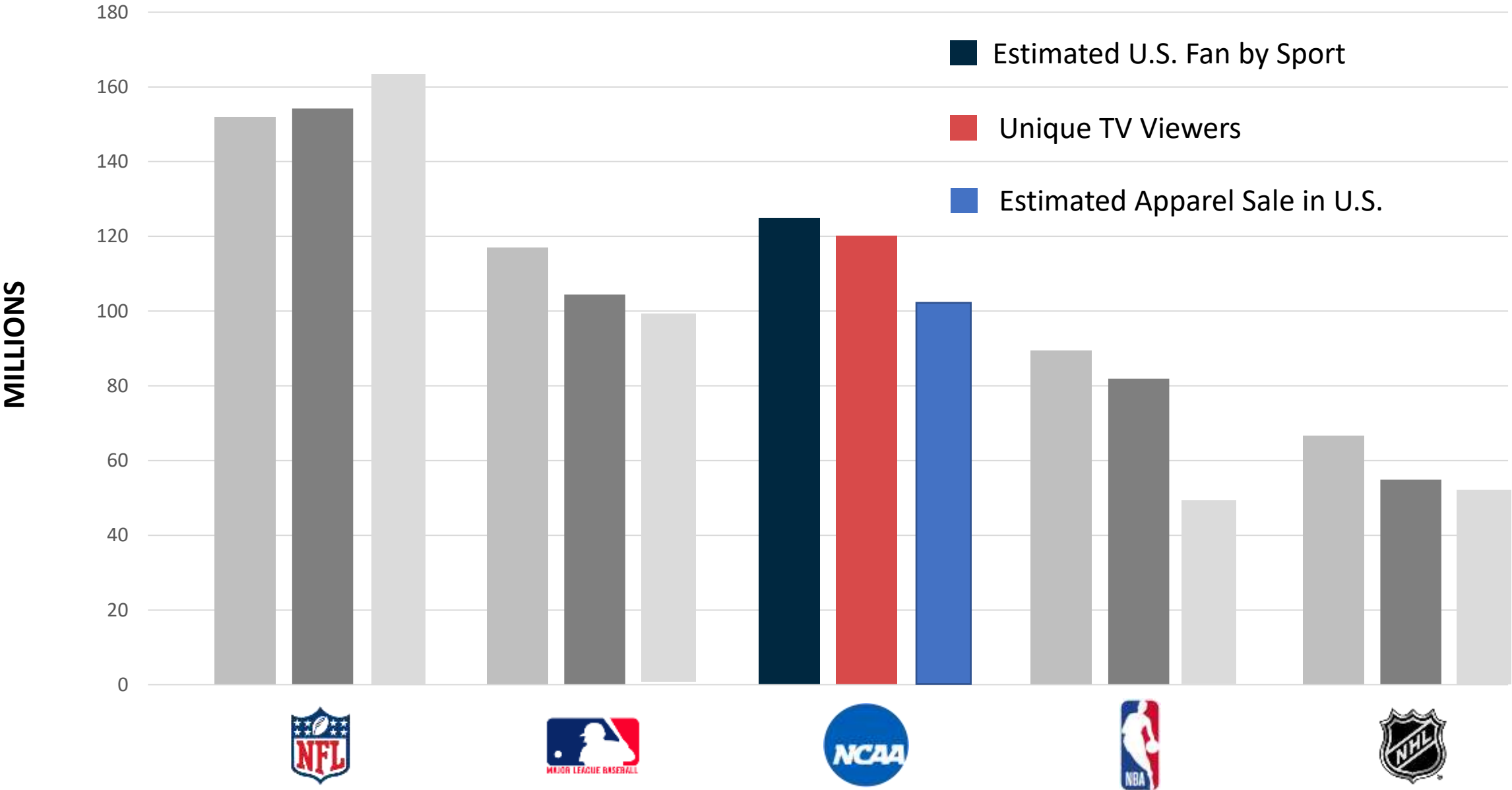
Our clients attain...

 **30%**

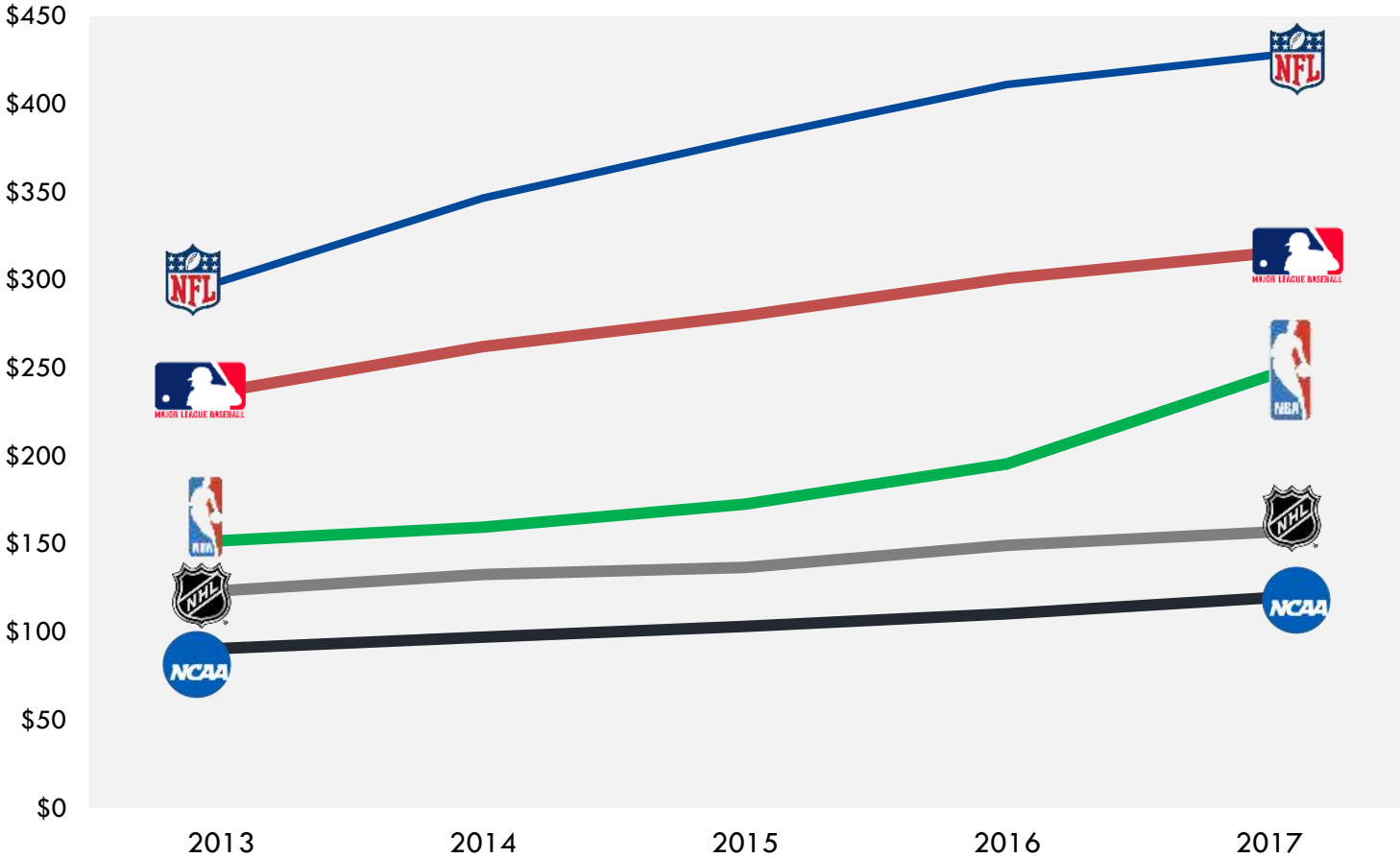
more revenue on sponsorship agreements than their peers.

SETTING THE STAGE: COLLEGE VS. PRO





Average Revenue per Team (\$M)



LEAGUE	CAGR (2013-2017)	2017 REVENUE (\$M)
NFL	7.4%	\$427.5
MLB	5.9%	\$315.3
NBA	10.1%	\$245.6
NHL	4.9%	\$156.7
Power 5	5.7%	\$119.3

What the future holds...



PRO STYLE SALES GROUPS



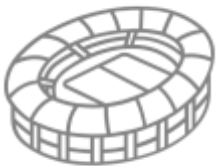
**CREATING & OWNING
IP/EVENTS**



**BUYING & DISTRIBUTING
CONTENT**



**CAMPUS WIDE
PARTNERSHIPS**



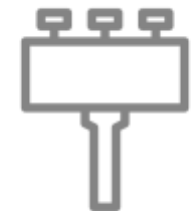
ROI DRIVEN FACILITIES



**PREMIUM EXPERIENCES &
HOSPITALITY**



**COMMERCIAL USE OF
FACILITIES**

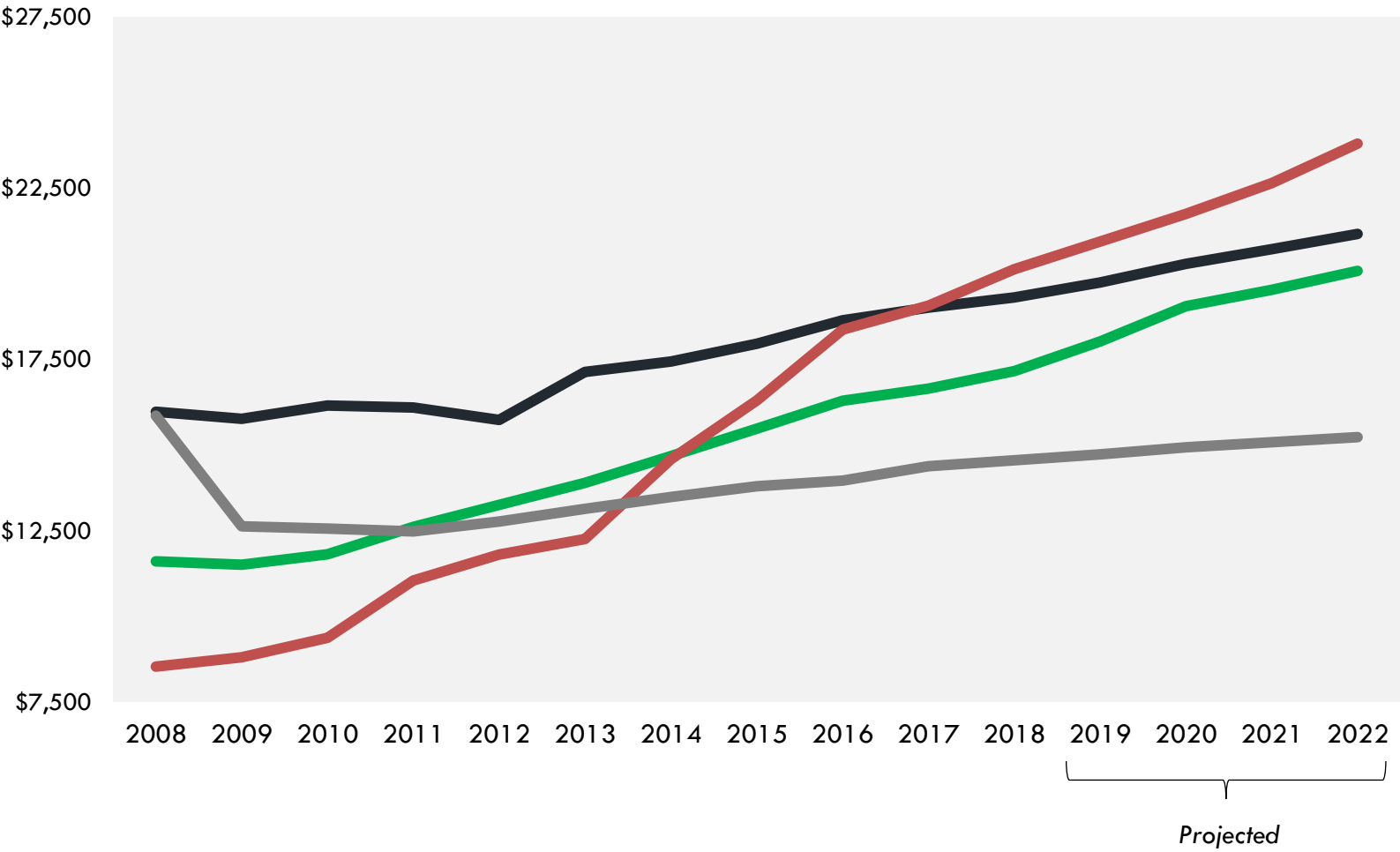


NAMING RIGHTS

A background image of a football game, showing players in white and red uniforms (ESU) and blue and white uniforms (number 55) in a three-point stance on a grass field. The image is dimmed to allow text to be read.

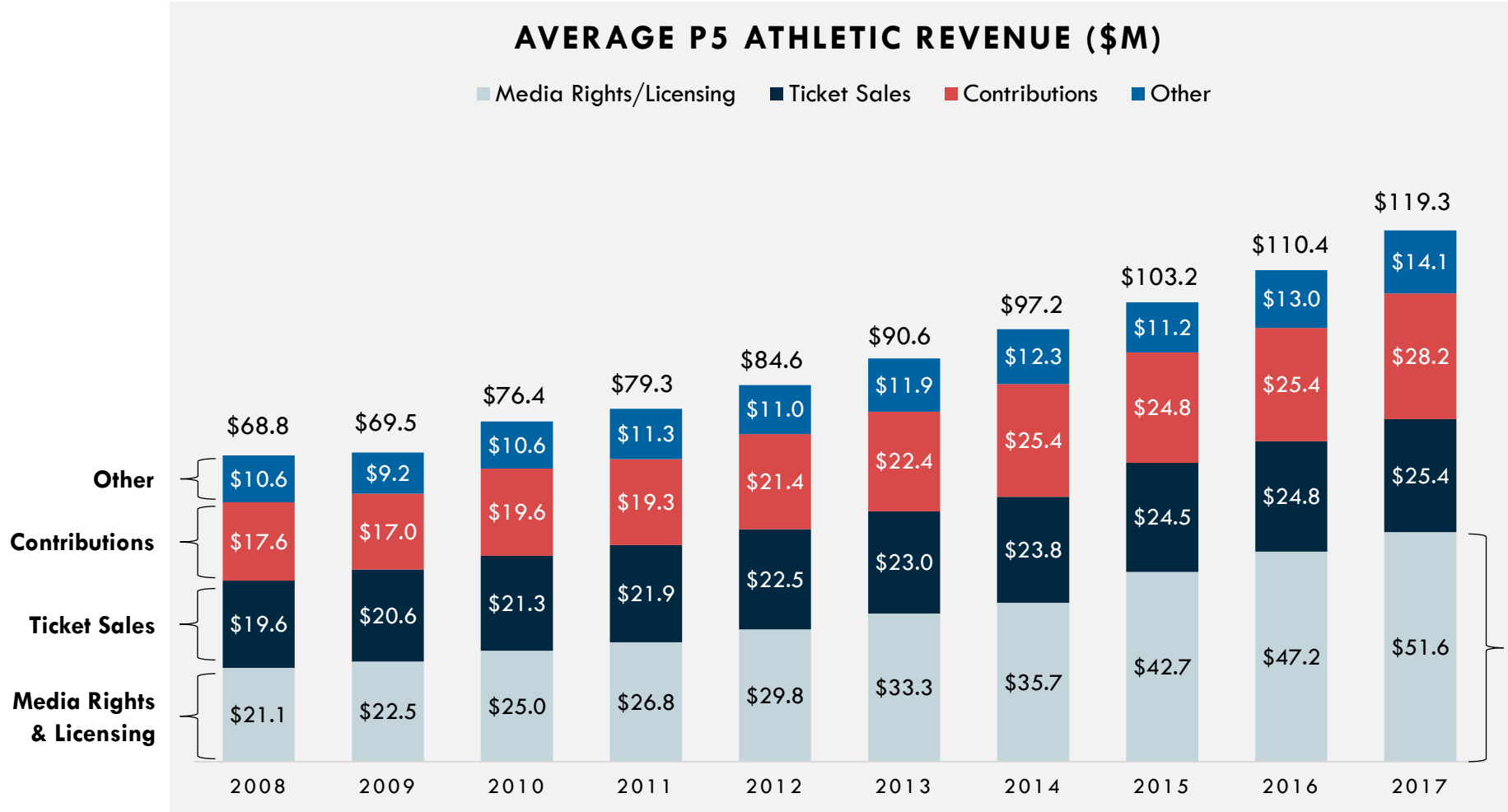
THE FUTURE OF TELEVISION & VIDEO

US Sports Revenues (\$M)



CAGR (2018 – 2022)		
<div></div>	Media Rights	4.5%
<div></div>	Gate Revenues	2.2%
<div></div>	Sponsorship	3.8%
<div></div>	Merchandising	1.2%

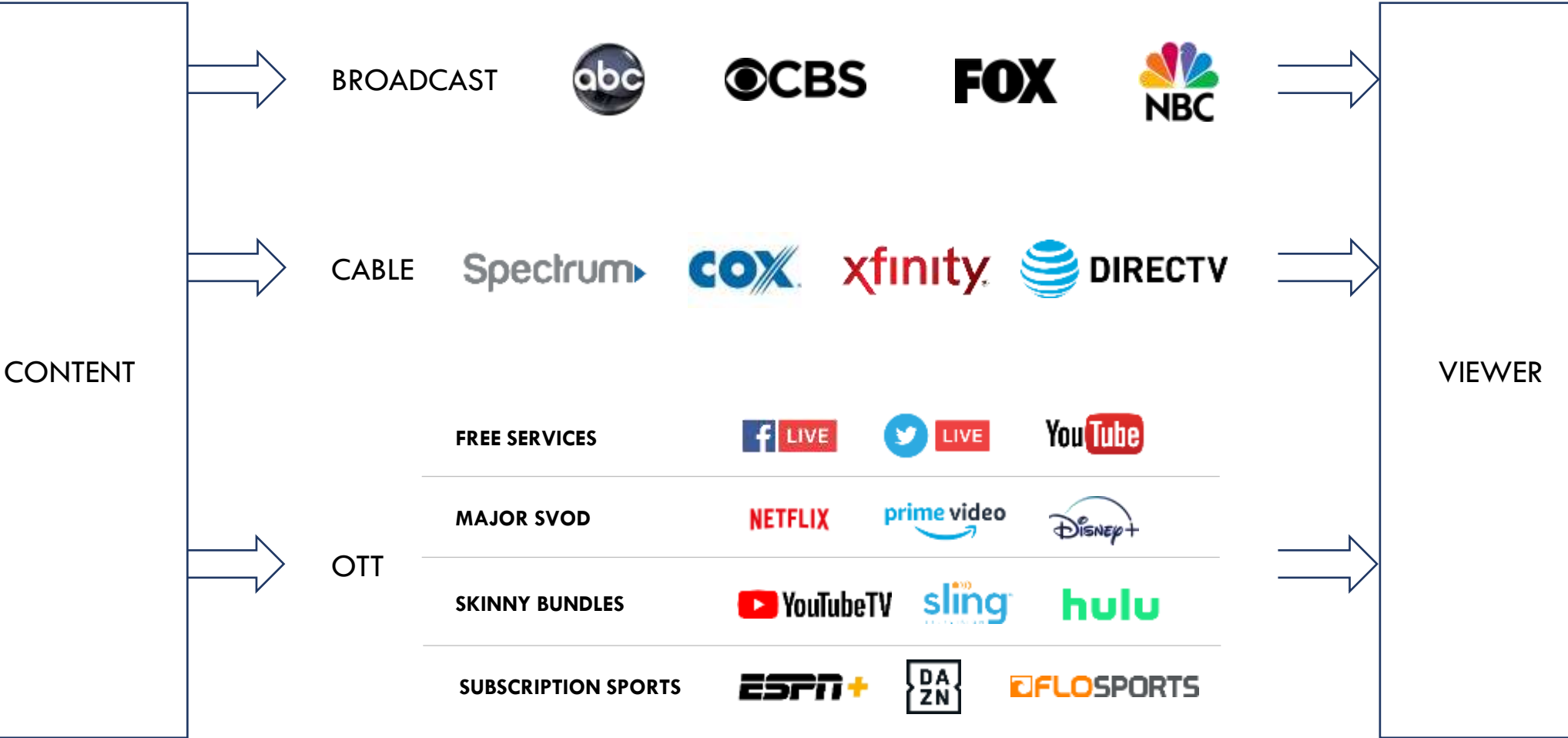
Source: PwC Sports Outlook North America (2018)



CAGR (2008 – 2017)	
Media Rights/Licensing	10.5%
Ticket Sales	2.9%
Contributions	5.4%
Other	3.3%
Total	6.3%

Media Rights & Licensing Proportion of Revenue	
2008	31%
2017	43%

✂ “Nearly 25% of U.S. Households Will be Cord-Cutters by 2022”



2019 FREE CASH FLOW

\$202.5B



\$80.5B

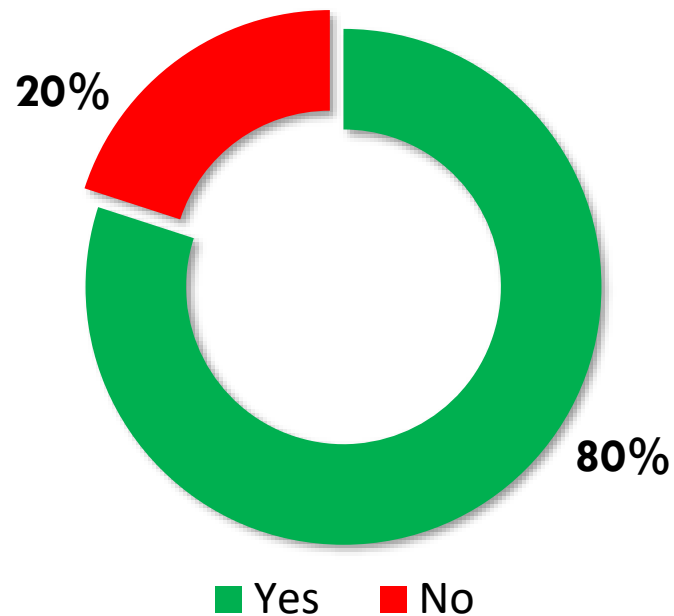

COMCAST



 AT&T

Q: In 5 years, will a majority of sports fans (over 50%) watch live sports through an internet streaming service (like Hulu, Netflix, Amazon, Sling TV, Yahoo) rather than through a traditional cable or satellite subscription service?

A:



Strength Meter for Each Response
(On a 10 Point Scale)

9.7 ↑
Yes

2.4 ↓
No

SHIFTING TO SOCIAL, DIGITAL & MOBILE



Boomers

1946 - 1964



Gen X

1965 - 1980



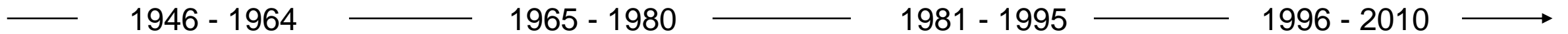
Millennials

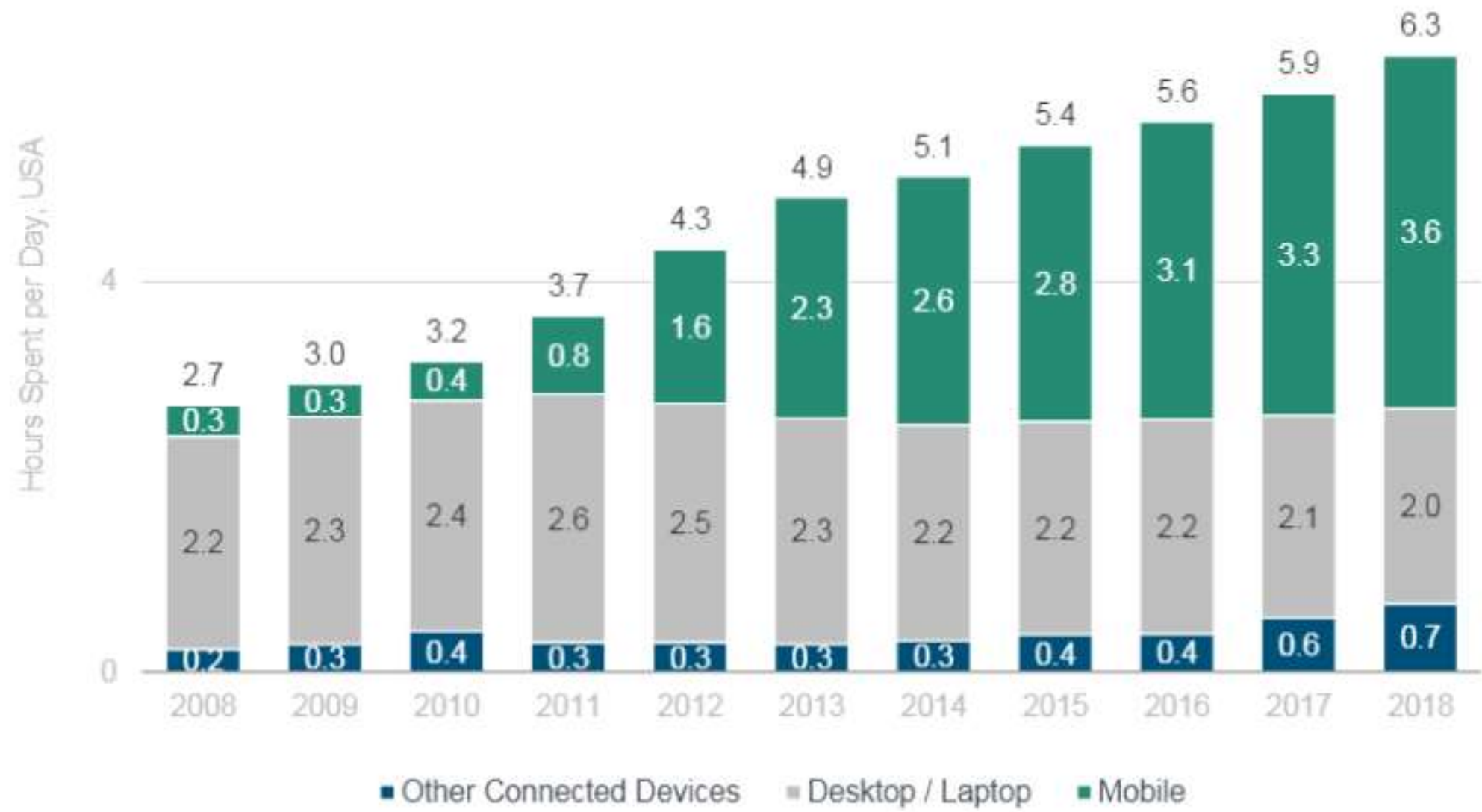
1981 - 1995



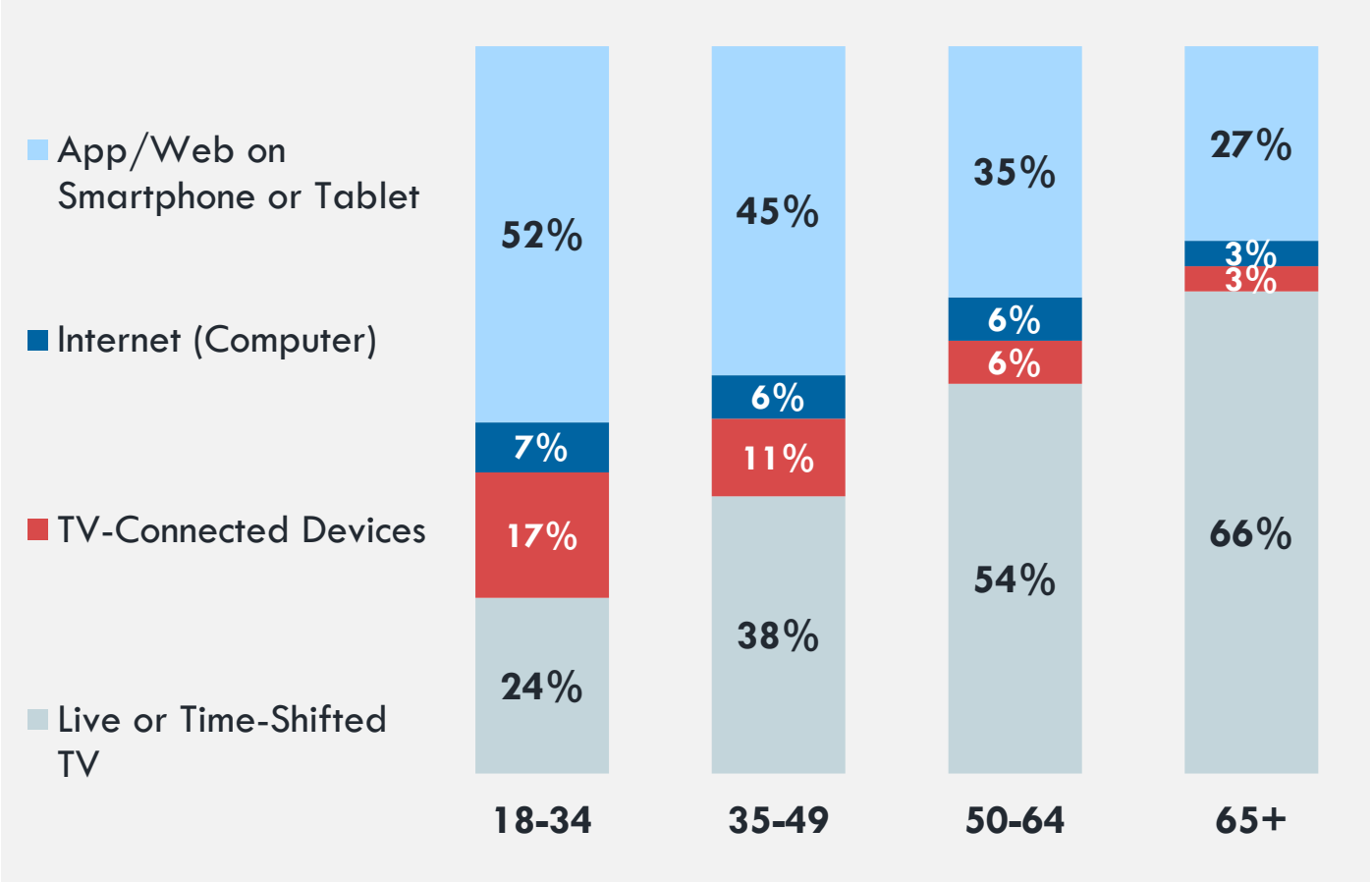
Gen Z

1996 - 2010

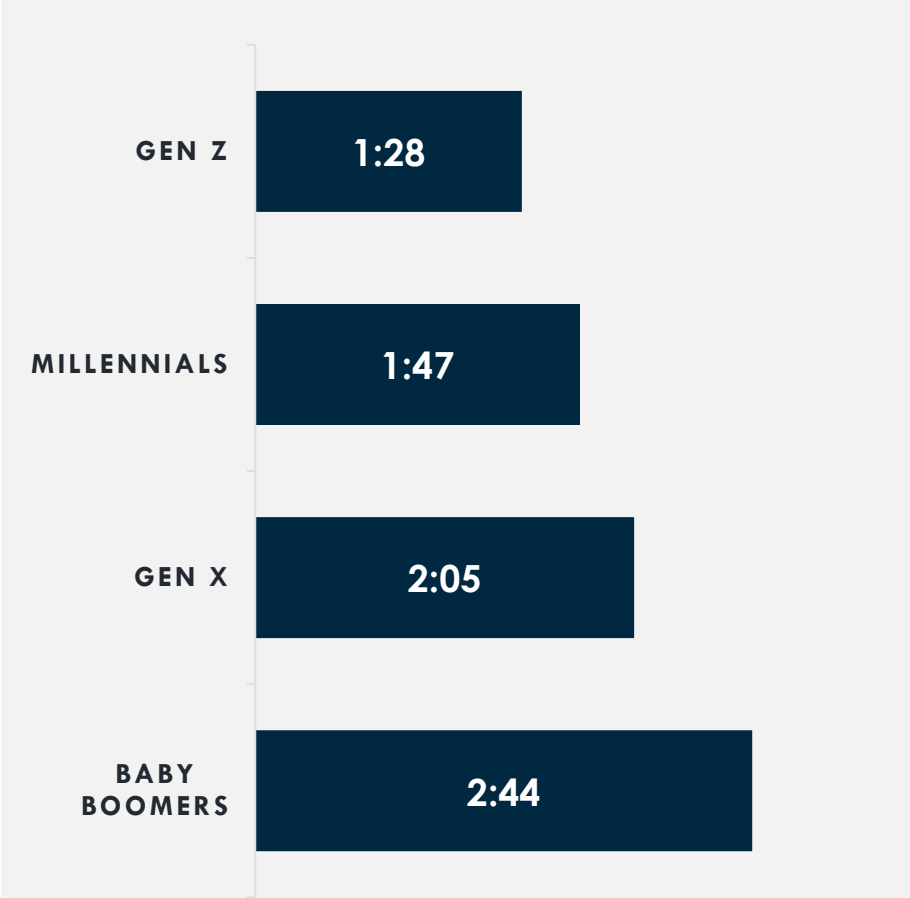




SHARE OF DAILY MEDIA TIME SPENT BY PLATFORM

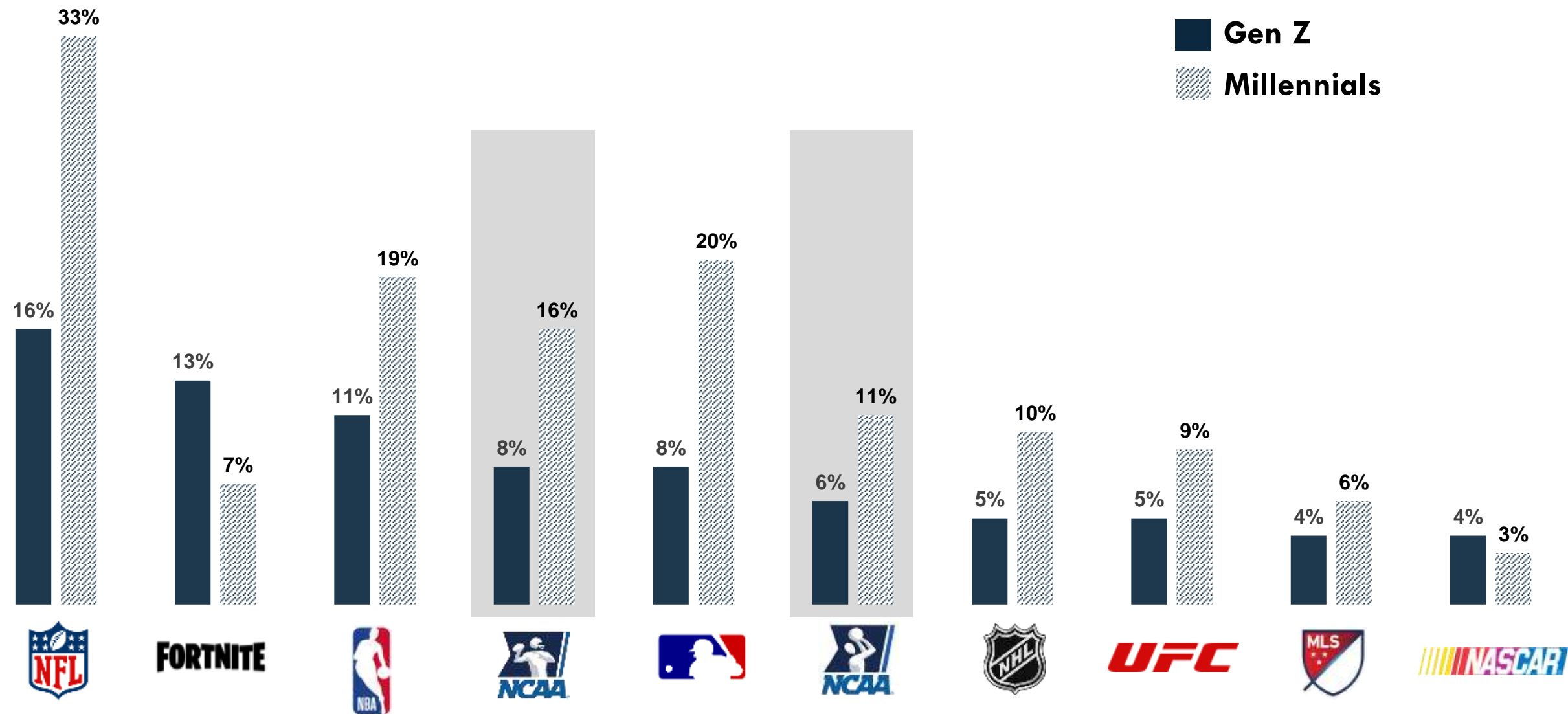


DAILY TIME SPENT ON LINEAR TV



Sources: Nielsen Total Audience Report Q12019 (Radio excluded); Global Web Index Q3 2018

WHERE DO SPORTS FIT IN WITH GEN Z?



Q: How would you describe your interest in each of the following? Showing 'passionate fan' responses

WHAT FANS WANT



“TO SEE ENTERTAINING **TRENDS**”



“LOOKING TO **WATCH** FUN/ENTERTAINING CONTENT”



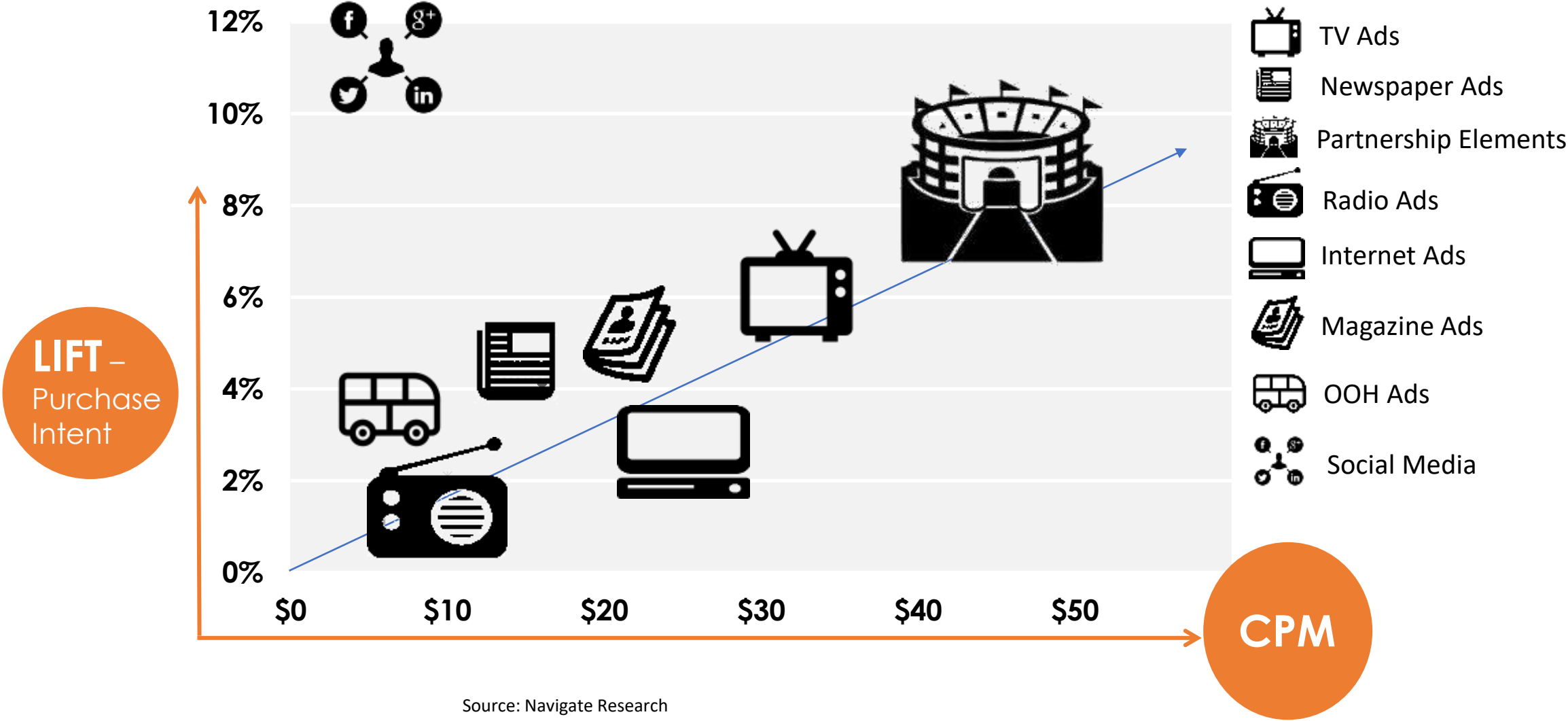
“**SHARE** THINGS I FIND INTERESTING OR ENTERTAINING”



“TO GET A **DEEPER LOOK** AT THE TEAM”



“TO KEEP UP WITH THE **NEWS**”



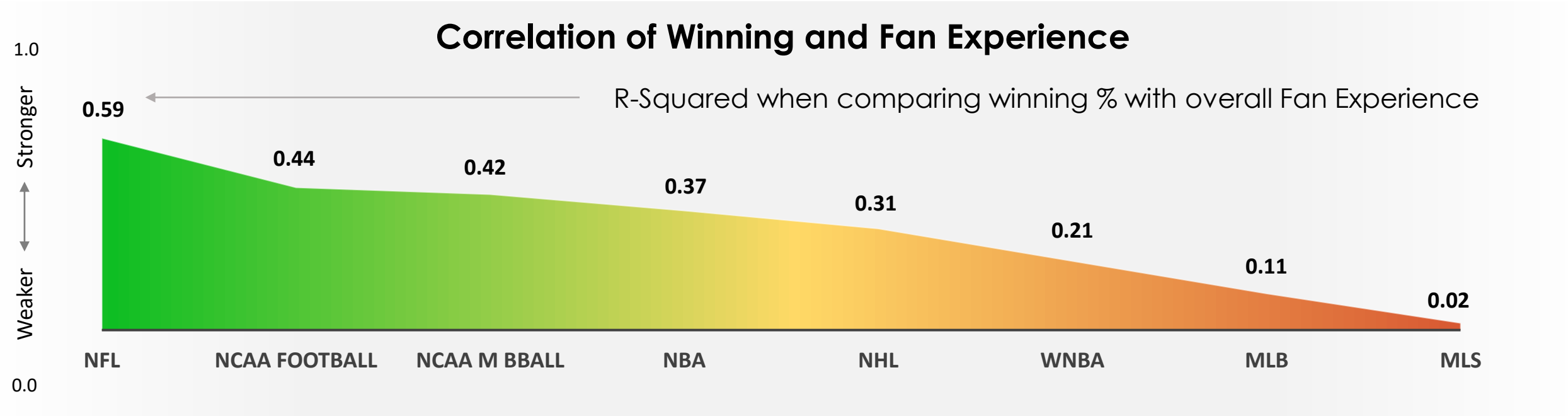
FAN EXPERIENCE & TICKETING INSIGHTS

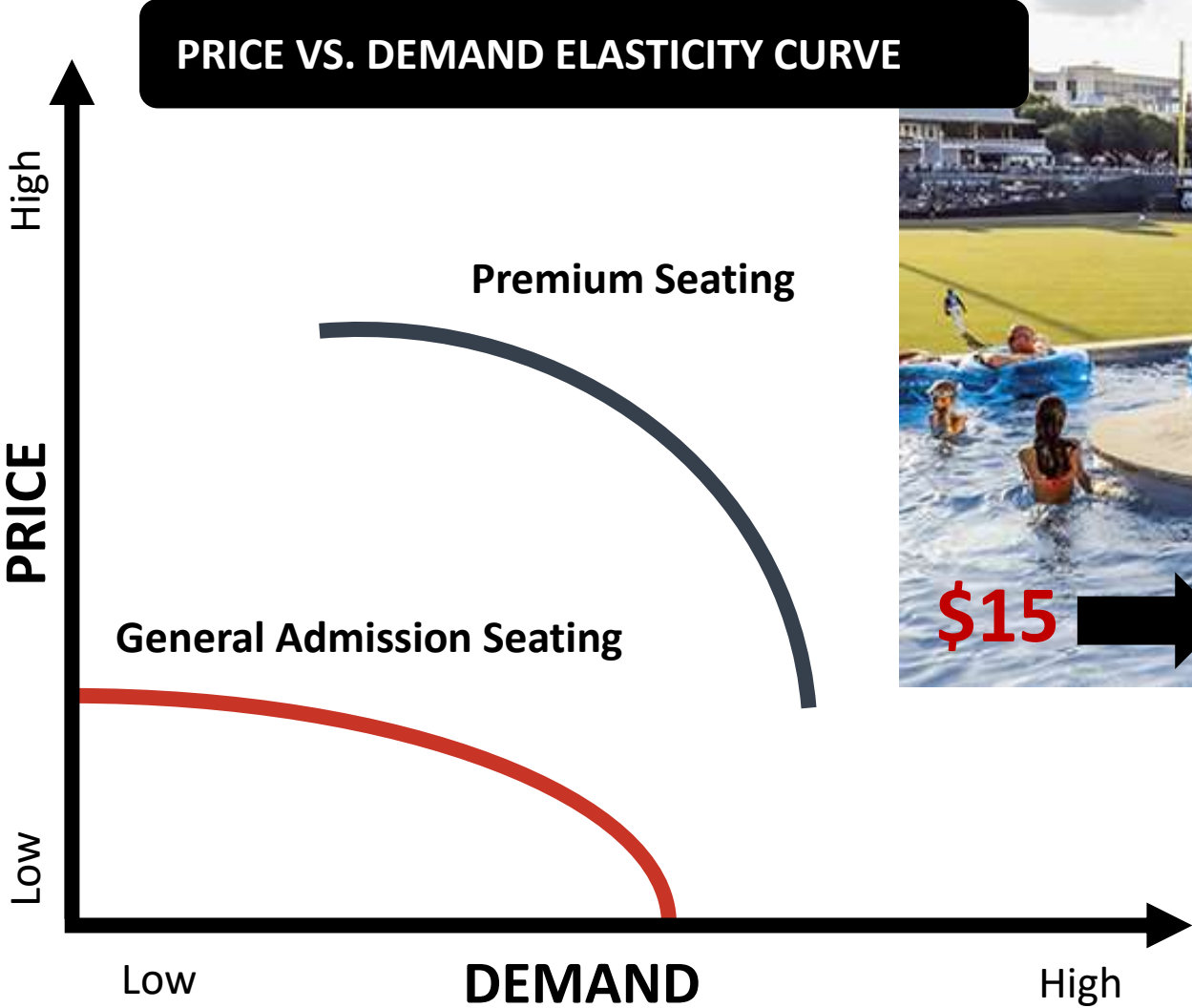


Winning correlates most with Fan Experience ratings in the NFL;
Least with MLS

All FansAttendeesNon-Attendees

TEAMSVENUES







- 57% of fans prefer to watch sports at **HOME**
- 63% of fans go to a live event for the **EXPERIENCE**
- 83% level of satisfaction with **AT-HOME** experience

For several metrics stated importance does not align with actual importance in having a positive fan experience.

Venue Factors		
Stated		Actual
7	Food Drink Quality	1
8	Scoreboard	2
5	Security	3
6	Ease of Getting Around	4
4	Restroom Cleanliness	5
1	View	6
9	Technology	7
2	Ease of Getting To	8
3	Parking	9



THANK YOU

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