

# NBA All-Star Technology Summit

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## Jimmy Pitaro

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## Shay Segev

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FULL STREAM AHEAD: EXPLORING THE STREAMING  
INNOVATIONS REVOLUTIONIZING SPORTS

AHMAD RASHAD: I'm going to walk back over there again.

(Applause and cheers.)

AHMAD RASHAD: Thank you very much.

Time for our next panel, this time on streaming. How fans consume the game is constantly changing. So our panel of media giants right over there will dive into the latest trends shaping the telecast of tomorrow.

And moderating this discussion is another familiar face for us here at Tech Summit. She's a senior media and technology reporter at CNBC, and she's been covering streaming platforms since they were very beginning.

Please help me welcome Julia Boorstin.

(Applause.)



JULIA BOORSTIN: Thank you so much.

Thank you so much. I'm so thrilled to be here. Such an incredible lineup of panels today, and it's going to be such an incredible weekend. And I feel like having this group of leaders of the streaming space at this time of so much change, innovation, consolidation, this could not be a more all-star lineup.

So really a panel that needs no introduction, but we have Bela Bajaria, chief content officer at Netflix; Amazon's head of Prime Video and Amazon Studios, Mike Hopkins; NBC Sports' Rick Cordella; ESPN's Jimmy Pitaro; YouTube's chief business officer, Mary Ellen Coe; and CEO of DAZN, Shay Segev.

We have so much to talk about, but I'm going to kick it off with Rick because we've been watching so much Olympics on Peacock in our house, and because you have NBA back on NBC for the first time in two decades.

So as you figure out the future of streaming, how do these NBA rights fit into your larger strategy with Peacock and even with Comcast?

RICK CORDELLA: Yeah, I mean, you look at what we have already in our portfolio, we had the NFL, we had the Olympics. You add a property like the NBA, and it feels like whatever media fragmentations happen, whatever future partnerships may exist, the NBA just makes us a must-have.

And so that was where we started from. It also fills in seasonally for us, because we were a little fallow in the springtime, having some heavy football in the fall months, and just overall that we could elevate it.

Our Sunday night strategy, too, where we took Sunday Night Football and sort of married that back to Sunday Night Basketball. We had our first game at Madison Square Garden a couple weeks ago with the Knicks and Lakers, and to try and sort of surround that and add the pomp and circumstance to it, have Mike Tirico call it.

We took a lot of learnings from both the '90s and the NBA, as well as Sunday Night Football, and kind of married

**ASAP** sports . . . when all is said, we're done.®

those into what you see on Sunday night.

So, so far, so good for us.

JULIA BOORSTIN: So far, so good.

And, Jimmy, you've had a very busy six months or so. Since you were last up here onstage, you, of course, launched your big ESPN streaming service, and then that's part of a whole bundle. How is it going so far with offering all of ESPN on streaming?

JIMMY PITARO: It's going very well. We're very pleased with the engagement.

Two things happened, right? In August we went direct-to-consumer for the first time. We took our 12 networks and made them available direct. And we significantly enhanced the app.

And so, as I sit here right now, we're pleased with the uptake on the direct-to-consumer side. We're very pleased with how our fans have responded to the various product enhancements.

We were very clear internally, and externally, that we didn't just want to flip the switch and make the content available direct-to-consumer. We wanted to also augment, improve the user experience.

And, you know, things like multi-view, personalized SportsCenter, more short-form video, the integration of stats and betting and commerce, all that is being very well received by the sports fan.

JULIA BOORSTIN: So now that you have this streaming business, you're thinking about subscribers, digital ads as well as linear business, what are the metrics you watch to gauge success?

JIMMY PITARO: Yeah, it's a very good question. And I say this all the time, but we are looking holistically across the business.

So just to back up. When we went direct-to-consumer, I think a lot of people were waiting for ESPN to go direct. It was a common narrative in the industry: When is it going to happen?

We made the conscious decision to, at the same time, protect pay television, right? Pay television has been very good to ESPN. It's been very good to the Walt Disney Company. And we still see value in the pay TV ecosystem.

And so we made the decision, when we go direct, we are

still going to provide access, or we will be providing access to all the new features and functionality to customers in the pay TV universe.

On top of that, if we acquire content specifically for the direct-to-consumer platform, as we establish the relationships with the distributors, we will make that content available to their customers.

So the answer to your question, Julia, is we look holistically. Like, we're somewhat agnostic in terms of how you buy ESPN, whether it's direct-to-consumer or through pay television.

JULIA BOORSTIN: Yeah, and we'll talk more about bundling and how that all fits into it in a bit.

But, Mike, I want to bring you in here because you also have this question of viewership. And with Amazon, you're not just looking at numbers. You're looking at what those sports viewers or those Prime viewers do when they're also on Amazon buying paper towels. So how do you measure success?

MIKE HOPKINS: Well, definitely not by the paper towels.

JULIA BOORSTIN: Those are low margins.

MIKE HOPKINS: It's a great question because, like all streaming companies, you're looking to acquire new subscribers, retain them. You're looking at churn. You're looking at overall engagement. How do you drive viewership of other things when they come in for sports?

Because, after all, sports is still the one thing that people aggregate at the same time to watch. Right? So you can drive a lot of folks into your app.

But I think what's a little unique about us is that we also have these other lines of business. NBA is now integrated into -- the NBA merchandise is integrated into Prime Video. Our sales last year were up 60% on NBA. We've tripled the amount of selection we have on Amazon.com as a result of all of that.

And so we're constantly trying to find new ways to engage our customers, whether it's in the live game, in social media, and trying to just innovate the entire experience.

JULIA BOORSTIN: So it really has had an impact, a long ripple of impact outside of Prime Video.

Mary Ellen, it's amazing to look at how much YouTube has changed in terms of embracing live sports. It wasn't so many years ago that you were really almost entirely



focused on user-generated content. And there was plenty of user-generated content about sports, but now having the rights to the events themselves, marquee games, how do you think about your shift further into live sports at this point?

MARY ELLEN COE: Yeah, I think -- and you said it, sports has been on YouTube for a very long time. And the way I think about the platform, we are a platform to develop and engage fans.

And savvy leagues and teams and athletes know that fans come to YouTube, whether to hear the stories about their favorite athletes and teams or to see live events, and they want to do it with the creators they love, and they want to have those shared experiences. And that happens all around the globe.

So live events, in our view, is just a natural extension of that fan experience. 40 billion hours of content is watched annually on sports.

The Living Room has created a great opportunity. We say that Living Room is the longest overnight success. We're talking about it now. But it has been very immersive. You can see all the formats, from podcasting, your favorite sports announcers' podcasting, to short-form video, clips and highlights.

And so that experience, and then doing things like the Brazil game with the NFL, really is kind of a full-circle moment for the fans.

JULIA BOORSTIN: Are you seeing enough of an impact from those big events, like the Brazil game, that you expect to bid for more sports rights?

MARY ELLEN COE: So anything is possible, but ultimately we are here to super serve fans. And fans care about seeing the teams they love, the players they love. And, you know, we'll just make sure we're showing up in the right places.

JULIA BOORSTIN: I know the NFL may start renegotiating its rights this year, and I know no one on this panel is going to tell me what they're going to do about it.

So, Shay, bringing you in, DAZN has had such success internationally. As you focus more on your growth here in the U.S., what have you learned from your international work that you're able to bring to the streaming business here?

SHAY SEGEV: First, as you said, we are today the largest sport platform in the world outside the U.S. We work

globally pretty much with every league around the world. Many of the U.S. major leagues work with us internationally.

We are the home of the NFL outside the U.S. I mean, you mentioned Super Bowl, NFL. So, we have a record number of viewers outside the U.S. We are now the home of NHL as well. We have a college sport. And we're growing our portfolio.

We are now in a journey to enter to this market. I mean, clearly, the U.S. market is the largest market. We see big opportunities. We see it's a natural projection of our business.

We already exist. We have a boxing service here in the U.S. We have very engaged, loyal customers. We are today the largest boxing platform in the world. Actually, this weekend, we have an event in Vegas. Two weeks ago, we had a big event as well in New York.

So our boxing business is growing. We have a big partnership with FIFA. Last summer, we broadcast the FIFA Club World Cup globally, which took place here in the U.S. It's probably the biggest sport event ever streamed on a single platform. So we're proud of it.

And in the core, I mean, probably very different from many of the platform here, we are global, we are digital, and we are sport only, which basically is very similar to ESPN, but we are also digital and globally, which gives us the opportunity to go wide in terms of the geographical distribution, but also go deep in terms of the experience.

So we get together a lot of experiences which are very sports specific, like stats, like scores, like news, and many of the casual storytelling around it, a lot of AI, which I'm sure we're going to talk about it later, betting. There was a prediction we just announced two weeks ago, our deal with Polymarket.

So we want to create a continuous one-stop shop, and I think there's a big opportunity for us to bring all of this to the U.S. market.

JULIA BOORSTIN: Yeah, a competitive market, for sure. And, yes, we will talk about AI in a bit.

Reflecting on what Mary Ellen said about the sort of shift further into the sports rights, I want to go to you, Bela, because Netflix, which is also relatively new to the sports rights business, started off with this event strategy. You were creating events. And you continue to create events, like "Skyscraper Live," which we've been talking about all day here with our crew. But you're also making these big



bets on WWE, MLB.

What is your strategy now to balance those sports rights and also these events you're creating?

BELA BAJARIA: Hi. Hi, everybody. Just want to make sure they're awake because some of them look like they aren't. Okay.

So that hasn't changed, right? We want to -- we obviously make a lot of film and TV all around the world, and the idea of live events is very similar in the sense of what's big and buzzy and bold and surprising, and what is eventized.

And that's why our strategy has been NFL games on Christmas Day. We don't just do NFL games on Christmas Day. We have that, and we know people love the NFL, I love the NFL too, but then we have "Beyonce Bowl" or Snoop Dogg, and let's do halftime, and let's make it a big entertainment type of thing. And it's also launched globally, right, around the world. The rights aren't distributed in different places.

And so that idea of doing Canelo-Crawford, you know, a boxing match, or doing Alex Honnold "Skyscraper Live," as he scales up that building very quickly somehow, you know, that has created so much conversation, and that's what we're looking to do.

And it's not just in sports that we're trying to do live events, it's really like what's surprising, what's entertaining, what can we do on top of film and TV that can do that.

And look, we have a lot of great strategic and deep relationships with most of the leagues, and some of them is sort of based around -- you know, we have World Baseball Classic in Japan, and we're excited to do the opening MLB game and also Home Run Derby.

And we have some of these events that are definitely with the leagues, and then we have, like, amazing partnerships, like, you know, with the NBA for "Starting 5" and storytelling, and with the IOC on, you know -- and looking at different athletes.

So the live events, the strategy is still the same. What's big, bold, buzzy, surprising, and what can we do, whether it's creating our own or partnering with a league to find that right kind of event.

JULIA BOORSTIN: How does this all fit into your strategy off of just -- away from just that event itself? Whether it's tying those live events to series, or now you have a podcast business, you also have an experience business, games, how are you connecting all of these things?

BELA BAJARIA: First, it's always going to be about, okay, what is this, you know, event or film and TV, and what's that audience? Then the other thing is, okay, how do you carry it through for that year?

So it could be obviously natural extension, and a lot of those personalities or podcasts, you know, people come to Netflix, and you can -- you know, you can connect to sports and watch, you know, Bill Simmons, The Ringer, or you like Michael Irvin, you know, Barstool, like you can sort of naturally be able to do that, or crime, and there's a crime podcast, and there's kind of the natural way to do that on service.

But I think it's mostly here's these different audiences around the world, and they can come to a Canelo-Crawford fight, and then you go, okay, we have these other titles already on service, or about to launch on service, and you can take that audience, right, that you might have, to Mike's point, you know, acquired over a new event, and then the retention part and making sure you have enough things for them to watch.

The good thing is on Netflix, you come for something, we have enough film and TV and other things that hopefully you can find and love.

JULIA BOORSTIN: I have to ask another question of you here before I move on because I'm so obsessed with the international and global nature of what Netflix does. And as you create these events, or decide which of these events you're going to invest in, how do you balance or approach the fact that your audience is so incredibly global?

Obviously, "Skyscraper Live," that's in Taipei, you have a good in there, but to a broader audience, but how do you think about sports on the global stage?

BELA BAJARIA: Look, I think there's definitely -- when we look at those sports, you can say we have World Baseball Classic in Japan, right? So that's like something very specific in Japan that's very meaningful there, and then there's things like Canelo-Crawford was as much of a live event in Mexico as it was, you know, anywhere else. And Anthony Joshua obviously really resonates in the UK.

So there's definitely certain sports and/or athletes or what those things are that can be -- but in the end of the day, we launch everything globally. And so even when we have the NFL game on Christmas Day, they're reaching a global audience.

So you might get those fans in different countries from



maybe not their biggest sport in their country, but then you start either hopefully adding fans to that, or you're really picking up those fans in those countries.

So it really is -- it's a mix of different things, but we definitely know in certain countries, right, what is their top one or two kind of biggest sports, and we'll sort of -- you know, can look at that.

JULIA BOORSTIN: Yeah. As Bela talks about the eventizing of it, obviously sports is the most valuable content out there, and then there are those prime pieces of it. You have a very busy February --

BELA BAJARIA: What are you talking about? "Stranger Things" is very valuable, by the way.

JULIA BOORSTIN: "Stranger Things," "Stranger Things." From an ad sales perspective --

BELA BAJARIA: Okay.

JULIA BOORSTIN: -- highest ad rates. I got to be careful here.

You have Legendary February.

RICK CORDELLA: Legendary February.

JULIA BOORSTIN: You're jamming a lot into this month. How do you make sure it doesn't cannibalize itself and you're really maximizing the value?

RICK CORDELLA: I think we looked at it, I mean, we did it purposefully. When we did the new NFL deal in 2021, we lined it up with the Winter Olympics, probably controlled the ad market. So we're selling basically a lot of the GRPs that are available in Q1.

We also had the programming. So we had the Olympics following the Super Bowl, so it gives you a good boost up there overall.

But it's worked. It's worked for those properties. And the Super Bowl then promotes the Olympics, the Olympics promotes the Super Bowl, but also promotes the rest of the portfolio. We've had a lot of success. Even this week we had one of the highest VOD usage weeks in our history at Peacock.

So what happens when you have these three big events, including the NBA All-Star Game, come together is that you level up the business. So where you started the month is here, you're now here at the end of the month, and we think Peacock and NBC broadcast is better off for it.

JULIA BOORSTIN: Yeah, and certainly a lot of streamers stuck with the Peacock app.

RICK CORDELLA: We reached over 200 million Americans so far in February.

JULIA BOORSTIN: Wow.

And so you're doing something similar with the Year of the Super Bowl. You're making it a yearlong event.

JIMMY PITARO: We are.

JULIA BOORSTIN: Tell us about this. What's the strategy?

JIMMY PITARO: Yeah, so we kicked it off right after the Super Bowl last week. We had Chris Berman doing "NFL Primetime" on the field, and he handed it off to Scott Van Pelt, who was live at SoFi. And we then took our studio programming and had several shows at the L.A. production center downtown. We had several shows on location at Disneyland. So you're going to see a ton of Disney synergy.

JULIA BOORSTIN: And it's going to be beyond ESPN, but really into other parts of Disney?

JIMMY PITARO: Exactly right. So this is a Disney priority, not an ESPN priority this year leading up to the Super Bowl. And tons of original storytelling. We have -- Burke Magnus promoted someone in his group named Andy Tennant, and his title is Vice President of the Super Bowl. So this is what he's doing. Every single day he's waking up saying, How can we make this the best Super Bowl ever?

And that is the goal. We're pretty energized. By the way, we've never had a Super Bowl before, ESPN. ABC has, but ESPN has never produced or broadcast a Super Bowl before.

JULIA BOORSTIN: What does that say about the way Disney, with its incoming CEO, thinks about the role ESPN plays at the company?

JIMMY PITARO: Yeah, look, I think all you have to do is look at Disney+. There's an ESPN tile there. We have ESPN programming across Hulu. There is -- I know you want to talk about bundles, you said that before, but I'm going to go there now.

There is what we call internally the Trio Bundle, which is ESPN direct-to-consumer, Disney+, and Hulu. If today --



and Bob has said this publicly. 80% of those subscribing to ESPN direct-to-consumer have elected to purchase the Trio Bundle.

So ESPN is a very important part of the entire Walt Disney Company strategy.

JULIA BOORSTIN: And, interestingly, not to jump ahead, but you also are bundled with some of your rivals. We're also in a world with new skinny sports bundles. Why does that make sense for ESPN?

JIMMY PITARO: Options.

MARY ELLEN COE: Our very dear friend.

JIMMY PITARO: Yes. We had an interesting fall, but we got through it.

MARY ELLEN COE: There's all love in the house.

JIMMY PITARO: Yes. We are in a very good place.

What was your question?

(Laughter.)

JIMMY PITARO: I'm not kidding, I lost it.

JULIA BOORSTIN: We were talking about the value of having ESPN be bundled with Hulu and Disney+.

JIMMY PITARO: Oh, right, competitors.

JULIA BOORSTIN: And now it's notable that that bundle can also be combined with Max. That bundle -- and now you have YouTube launching a skinny bundle.

JIMMY PITARO: Yeah. So we have a bundle with FOX One as a competitor. We're very pleased with that. We have a bundle with NFL+ Premium, which includes RedZone. That's how our fan will get access to RedZone. And that was a part of the larger NFL transaction that we recently closed.

The answer to your question, Julia, is options. We feel like it's smart to give the fan options.

And then the last thing I'd say on this is we understand that there's some confusion when you do that. We understand that there's also some friction, right, because you have to bounce from app to app. Traditional television, you just change the channel. This is different.

So as an extension of the bundling strategy, we are also

focused on what we call ingestion. We would very much like to not just offer a hard bundle, but have that content -- once you subscribe to the bundle, have that content live within the ESPN environment.

JULIA BOORSTIN: And so I have to ask you now, Mary Ellen, how this all fits into your strategy around the new skinny bundle and what that means for YouTube, not just for that bundle itself, but for the rest of YouTube TV and all of that.

MARY ELLEN COE: Yeah. So fans want it to be easy to find the teams and the games they love. And the challenge is the rights landscape doesn't always make that easy for the consumer.

So we're really excited. We announced we're launching 10 genre packs, and a sports tier is top of that list, for \$64.99, and that'll be \$54.99, a promotional price kickoff for new YouTube TV users.

Rick's a great partner to us. Jimmy's a great partner to us. But it's going to be a really easy experience for the fan to find all the teams and most of the games that they love in one place.

So we're really excited about that. We feel like it's solving a really important fan pain point.

JULIA BOORSTIN: Yeah, this question of fragmentation.

Mike, as you and Amazon have grown your sports portfolio, you also want to be what we call the base of the bundle, the place where people can aggregate their apps.

How do you see that playing out over the long term? And also, how are your sports viewers different? Are they a different quality of consumer for you?

MIKE HOPKINS: You know, the first thing we did in sports was in the UK with the English Premier League. And that was always a question back when we did that. And what we find is whether you come in to watch "Fallout" or you come in to watch the NBA, you behave in a very narrow range in terms of subscription behavior post that sign-up. And so it's been, you know -- it's been accretive across the board every time we've done it.

But back to, you know, this idea of bundling and, you know, our Prime Video subscriptions business, we're finding that, you know, what Mary Ellen was saying, if you can have most of what people want all in one app, that friction is just so powerful, getting rid of it. And if you can have an experience where -- you know, we've got Peacock as well. So we're talking about the NBA. We have a few teams that



we have local rights for. We have NBA League Pass where you can subscribe to Peacock.

And so the array of NBA that you can get just in one app is really powerful. So we see customers flying through, using multi-view, going to different games, obviously shopping. They can do a lot of -- get a lot of value out of that. And whether it's the NFL or the NBA, NASCAR, we have that option for customers.

And on the entertainment side, it's also there with the array of channel partners that we have. And just having that one-stop shop where you can go and spend more time, I think, is valuable not just for Amazon, obviously, but for our partners as well.

JULIA BOORSTIN: Yeah, and just addressing this challenge of fragmentation from a consumer standpoint.

Shay, for you, as you look, reportedly, I should say, there have been plenty of reports that are looking to acquire Main Street Sports Group. What is it about local rights right now that's so appealing to you? And how do you see local rights fitting into this streaming landscape and this question of fragmentation and consumers needing to find their content?

SHAY SEGEV: Yeah, we will be looking, as I said, to enter in a more meaningful way to the U.S. market. Regional rights deliver very valuable rights. You know, of course, the NBA rights, MLB, NHL.

These are very relevant rights. The way it's finally distributed, as we all know, is under a challenge. We see a great opportunity to package it and to redistribute it probably in a hybrid way.

I mean, I connect to what Jimmy said before. I mean, linear and digital, but we know the futures go to digital in order not to lose customers on this transition. So we see this great opportunity, very valuable rights.

And we think that someone can be a winner through this transformation. And then, again, through our technology, through the fact that we have all of these capabilities with our platform to package rights in a different way. And with our relationship with the leagues, we see it as a natural opportunity. We will keep being disciplined and looking for the right opportunity for us to expand.

I mean, our business is really two models. We have a domestic model, and we have a global model. At some point, we believe it will connect. So we have around 20 markets. I mean, you mentioned Japan. Japan is a big market for us with all of the baseball, football, et cetera.

Italy, Germany, Spain, France. I can go on and on about markets. But we have domestic rights. We have the ESPN, the Fox of that market.

And then we have some categories of sports that we have globally. I mean, ideally, we want to roll our business to become more and more global. And having a good presence here through distribution, through brand awareness in this market will help us to transition more.

I mean, basketball is a good opportunity. We have a big partnership with FIBA. I saw some of the FIBA people as well. So we have a global partnership with FIBA. Hopefully, one of the verticals we want to build is also a global vertical for basketball, as we did for boxing, as we did with the NFL, with the NHL.

So U.S. is quite important component, and regional rights could play a role in this.

JULIA BOORSTIN: Yeah, it will be interesting to see how the local business is transformed because of this.

Mary Ellen, thinking about how each of these players on the stage brings something unique in terms of what they bring to the sports rights business and monetizing it, obviously, YouTube is just an ad behemoth. As we saw in Google's recent earnings numbers, just the sheer volume of your ad business is incredible across, obviously, user-generated content, as well as YouTube TV.

How do you see that breadth impacting the way you even think about buying sports rights and what you want to go for next?

MARY ELLEN COE: Yeah, so I think for partners, one of the benefits of our platform is the multiple business models. So a lot of people don't recognize we have a significant subscription portfolio. So YouTube Premium is a global subscription business, YouTube TV, NFL Sunday Ticket.

So we really have a twin engine of growth from a revenue perspective, the ads business and the subscriptions business. So if I'm working with a partner, we can look at our channels business, we can look at TVAD, we can look at in front of the paywall. So there's a variety of ways to actually monetize sports rights.

And the thing that I always say, whether I'm talking to leagues or teams, is it's really important, the number one thing, you need to invest in that IP and invest in creators, because ultimately, that directly engaging with those fans, streaming a game is a static experience. It's a moment in time. But having that community and fan engagement



directly through the eyes of a creator or in addition to that creator perspective, like our Watch With streams, that really is where the magic happens on the platform.

JULIA BOORSTIN: And so Watch With, now, is where the innovation is happening now. What's next? How are you working with creators to continue to push the envelope, to use technology to change the user experience?

MARY ELLEN COE: Yeah. So Watch With, for those who are not familiar with Watch With, think of it as an alternate cast. So you can actually, instead of dubbing, you can take audiences -- I think about IShow Speed, for example, who does live streaming on the platform. 50 million fans show up to every one of his live streams.

So when we do a game, you can actually Watch With, and we did this in Brazil with CazeTV, where the viewer and the fan actually gets to experience that game with their favorite creator. So we're finding all different ways. We have creators in on sideline, doing color commentary pre-game. The opportunities are endless there.

JULIA BOORSTIN: So for you, Jimmy, how have you seen evolving fan preferences impact what it is that you are doing and what you want to do next within the ESPN app?

JIMMY PITARO: Well, I think I mentioned before short-form video. So if you go back to August when we launched, we created a dedicated tab within the ESPN app, and it's called Verts. And so we just took a step back and said, look, things are really working at ESPN, in terms of our studio programming, up and to the right, in terms of our live game portfolio, which has never been better, pretty much everything up and to the right.

But one of our top priorities at the company is audience expansion. And that means a lot of things, but it especially means attracting a younger demographic. And everyone in this room knows that younger people are spending a ton of time on social and a ton of time with vertical, short-form, swipeable video.

And so we decided, like, we're very proud of the presence we have on social media platforms, and that has been a rising tide. I hear all the time: I was introduced to ESPN on Instagram, and now I'm watching "First Take." I hear that kind of thing all the time.

But we also said, okay, we need an experience like this within the ESPN app. And so obviously we launched Verts, and it's going incredibly well for us, and it's resonating well with the younger demographics. So we'll continue to lean in there.

And then personalization. I know I've been on this stage for many, many years, and we keep talking about personalization, right content, right user at the right time. And the best example of that at ESPN is a personalized SportsCenter.

I'm a huge sports fan. I have been since I was little. And when I joined ESPN, one of the first things I said to the team was: We've got to figure out a way to personalize SportsCenter so I can fire it up and get Yankees, Giants, Knicks, Rangers, Notre Dame football.

And so now that's what I get.

JULIA BOORSTIN: So AI is delivering.

JIMMY PITARO: Correct. That's a great example of us -- of AI being additive to the creator experience because, obviously, but for AI, we could not deliver millions of personalized SportsCenters. There's no way that that would be possible.

JULIA BOORSTIN: And, Mike, I know at Amazon, you've experimented with alternate feeds, enhanced stats, all these AI-driven enhanced features. How can you tell what's working and what kind of innovations you want to pursue next?

MIKE HOPKINS: Yeah, you know what's interesting is sports fans, they tell you when they don't like something, right? I mean, so we hear from fans if we do something that they don't like, and we can pivot and move to a different direction.

But we created an alternate feed called Prime Vision. And, you know, it's on NFL. We recently put it on NBA and NASCAR. And what it's allowed us to do is create sort of an incubator for these ideas, and we can try crazy stuff there.

We get the feedback. We can enhance it. And then, you know, we take a goal every year to move one or two of those innovations into the main feed.

Last week we moved -- I don't think we've actually branded it yet, but think of it as a virtual AI sky cam that we have at NBA games where we can take all the cameras that we have in place. You know, we have an AI model, and we can find unique camera angles that you wouldn't otherwise have seen.

And that's just one that we've done just in the last week. But we think it's an exciting area that not only can it be helpful for personalization, as Jimmy said, and then personalizing feeds of content, but can also enhance your



production as well.

JULIA BOORSTIN: And, Bela, you're experimenting with interactivity. You have live voting. What do you think the most important technology is going to be in terms of keeping the interaction with the next generation?

BELA BAJARIA: You know, Netflix has been so much about personalization for -- you know, since the beginning. And so that part of our -- so it's less -- no friction, are we giving you what you want right there, like, when you want it. And really being that superpower of, like, personalization is very important.

But it really is core to what we do, whether it's film, TV, sports, a live event, you know, and podcasts. So I think that is always going to be such an important part for us.

And it really is that, you know -- I mean, for me, in the end of the day, right, it always gets back to the storytelling. Storytelling meaning sports, right? Greatest story. Don't know the ending. Very different than my other job, which I actually can tell you what the ending is going to be.

But that part of just, you know, best kind of soap opera and those characters and that storytelling and how do you continue to connect with, again, the athletes they love, the stories they love. But I think that still is, like -- that superpower of Netflix has always been kind of about personalization.

And who says we're competitors? See, he gave me his cough drop? Amazon helping Netflix, I want you to know.

JULIA BOORSTIN: Frenemies, all frenemies. Perfect note to end on, the value of live sports and streaming and bringing into all sorts of new hands. And I know that's going to be the topic of the next panel on Gen Z. So I want to thank you all for joining us here today. Thank you.

(Applause.)

AHMAD RASHAD: And I want to thank you all for the great conversation. Fantastic.

All right, it's time for another quick break. I've been saying this all morning, but this time I really mean it. This is a really quick break, so get up, stretch your legs, and then sit back down.

No, I'm kidding. Come back in a few minutes. First person back in their seats gets a prize: You get to pet Wilbur.

FastScripts at ASAP Sports

