

Fast Facts



What you need to know about new & emerging trends, platforms or technology

What's the Spread?

Understanding the impact of streaming exclusivity on NFL viewership





How does Thursday Night Football's shift to streaming impact NFL viewership?

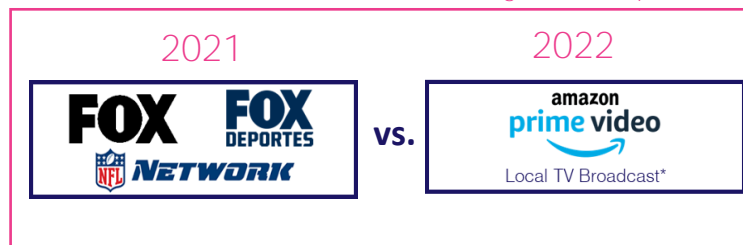
The 2022 NFL season saw Thursday Night Football shift from national TV to streaming, which was the first of a 11-year exclusive national distribution deal for Amazon Prime Video.

As watching sports via streaming grows more prevalent, we will show you how it is impacting audience reach and engagement across marquee NFL programming.

To understand the impact, we explored the following comparisons...

2021 vs. 2022 Thursday Night Football

(2021 linear TV vs. 2022 streaming viewership)



2022 Signature NFL Night Games

(TNF streaming vs. SNF / MNF linear TV only viewership)



...based on these comparable metrics:

Reach: The number of people who view a given platform or piece of content during a program's duration

Average Minute Audience (AMA): The measure of people engaging with each platform or piece of content in an average minute during a program's duration

Average Minutes: The measure of time spent engaging with each platform or piece of content by person during a program's duration

Fast Facts: Understanding the impact of streaming exclusivity on the NFL audience



1

Thursday Night Football audiences were down significantly in 2022 after shifting to streaming

2

Amazon's streaming exclusivity did garner larger audiences than NFL Network-only games

3

Amazon streaming delivered a higher average audience against P18-34 in 2022 than the prior year

4

TV networks drive much larger total audiences to their premier night game series than Amazon's TNF

5

NFL games available across broadcast & cable TV networks garner much higher reach

6

A key benefit of 'in-app' streaming TV is longer tune-in time vs. other video platforms

7

Streaming viewership is more likely to skew towards younger adults, like P18-34

8

Many more people watch Spanish language game coverage from TV networks than Amazon's TNF




How has the shift towards Amazon's streaming exclusivity impacted viewership for NFL's Thursday Night Football?



1

Average audience and weekly reach declined 37% and 49%, respectively vs. games that were available across multiple major video platforms in 2021 (broadcast + cable + streaming)

Weekly Averages - NFL Thursday Night Football 2021 vs. 2022 Comparable 'Thursday Night' Games

				<u>2022 vs. 2021</u> Audience Differences					
<u>2021</u>			<u>2022</u>	Amazon vs. NFL Network Only		Amazon vs. Broadcast & Cable TV		Amazon vs. 14-Game Average	
Cable TV Net Only (NFL Network: 4 Games)	Broadcast & Cable TV (FOX / FOX Deportes / NFL Network: 10 games)	14-Game Average (broadcast & cable TV or cable TV only)	Amazon Streaming (15 games includes the two in-market local broadcasts)	# Diff	% Diff	# Diff	% Diff	# Diff	% Diff
 8.5 MM	 15.1 MM	13.2 MM	 9.6 MM	+1.1 MM	+13%	-5.5 MM	-37%	-3.6 MM	-28%
17.5 MM	32.9 MM	28.6 MM	16.9 MM	-0.6 MM	-3%	-16.1 MM	-49%	-11.6 MM	-41%

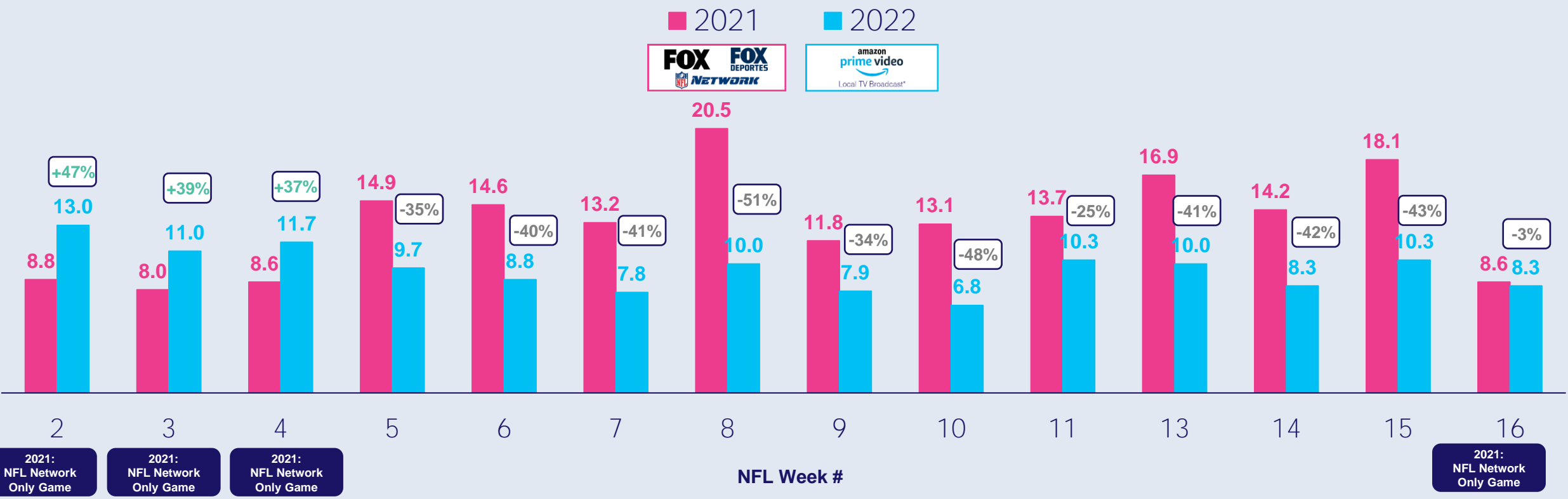
Source: VAB analysis of Nielsen NPower Powerplay and R&F Program Report, 2021 Season: FOX, FOX Deportes & NFL Network; 2022 Season: Amazon & local broadcast for in-game markets only (excludes pre- & post-game shows), Live+SD, P2+ **FOX, FOX Deportes & NFL Network reflects linear TV audience only and does not include audiences gained from their digital / app streaming.** 2021 reflects 14 games total (4 NFL Network only games: Weeks 2-4 & 16; 10 games with Fox / Fox Deportes, NFL Network & Amazon: Weeks 5-11 & 13-15). 2021 audience figures excludes Amazon since the platform was not measured by Nielsen in 2021. 2022 reflects 15 games total, streamed by Amazon (Weeks 2-11 & 13-17). *See [appendix](#) for schedule and single game details. Analysis reflects only those games played on Thursday Night.

2

However, with their higher subscription base, Amazon streaming consistently garnered larger audiences than NFL Network only games

▶ According to Kagan estimates, there are 54.1 million NFL Network subscribers vs. 70 MM+ million Amazon Prime Video subscriber users

Average Audience (Per Min) - NFL Thursday Night Football
 2021 vs. 2022 Comparable 'Thursday Night' Games (excludes week 17 in 2022)





Source: VAB analysis of Nielsen NPower Powerplay and R&F Program Report, 2021 Season: FOX, FOX Deportes & NFL Network; 2022 Season: Amazon & local broadcast for in-game markets only (excludes pre- & post-game shows), Live+SD, P2+ **FOX, FOX Deportes & NFL Network reflects linear TV audience only and does not include audiences gained from their digital / app streaming.** 2021 reflects 14 games total (4 NFL Network only games: Weeks 2-4 & 16; 10 games with Fox / Fox Deportes, NFL Network & Amazon: Weeks 5-11 & 13-15). 2021 audience figures excludes Amazon since the platform was not measured by Nielsen in 2021. Week 12 is excluded since there was no Amazon streamed game on Thanksgiving. *See appendix for schedule and single game details. Analysis reflects only those games played on Thursday Night.



3

Amazon did deliver a higher P18-34 average audience even though its reach against this younger demo was slightly below last year

▶ However, broadcast + cable TV games in 2021 (Fox + NFL Network) delivered a P18-34 AMA of 2,091K, practically at parity to Amazon YoY, and a 3,539K P18-34 average weekly reach which was a 19% YoY increase

Weekly Averages - NFL Thursday Night Football
2021 vs. 2022 Comparable 'Thursday Night' Games

Demo	Average Minute Audience (000)		
	 2021	 2022	YoY Change %
P13-24	723	661	-9%
P18-34	1,883	2,106	+12%
P18-49	4,945	4,694	-5%
P25-54	5,660	4,980	-12%

Demo	Reach (000)		
	 2021	 2022	YoY Change %
P13-24	1,373	1,105	-19%
P18-34	3,163	2,964	-6%
P18-49	9,376	7,229	-23%
P25-54	11,249	7,988	-29%

Source: VAB analysis of Nielsen NPower Powerplay and R&F Program Report, 2021 Season: FOX, FOX Deportes & NFL Network; 2022 Season: Amazon & local broadcast for in-game markets only (excludes pre- & post-game shows), Live+SD, P2+ **FOX, FOX Deportes & NFL Network reflects linear TV audience only and does not include audiences gained from their digital / app streaming.** 2021 reflects 14 games total (4 NFL Network only games: Weeks 2-4 & 16; 10 games with Fox / Fox Deportes, NFL Network & Amazon: Weeks 5-11 & 13-15). 2021 audience figures excludes Amazon since the platform was not measured by Nielsen in 2021. 2022 reflects 15 games total, streamed by Amazon (Weeks 2-11 & 13-17). *See [appendix](#) for schedule and single game details. Analysis reflects only those games played on Thursday Night.

How does Amazon's streaming exclusivity for Thursday Night Football match up against NBCU's Sunday Night Football & Disney's Monday Night Football?

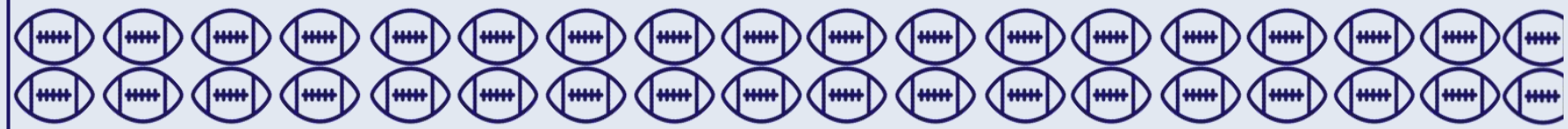


4

The linear TV networks that air Sunday Night & Monday Night Football drive much larger total audiences than Thursday Night Football's streaming-dominant platform

▶ In this analysis, NBCU's SNF & Disney's MNF viewership data is reflective of linear TV only and does not include their streaming viewership

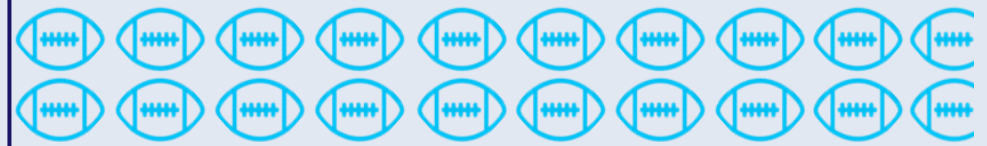
Weekly Average Audience (Per Min) – 2022 NFL Night Games
Comparable Weeks (NFL Weeks 2-11 & 13-17)



17.7MM



13.6MM



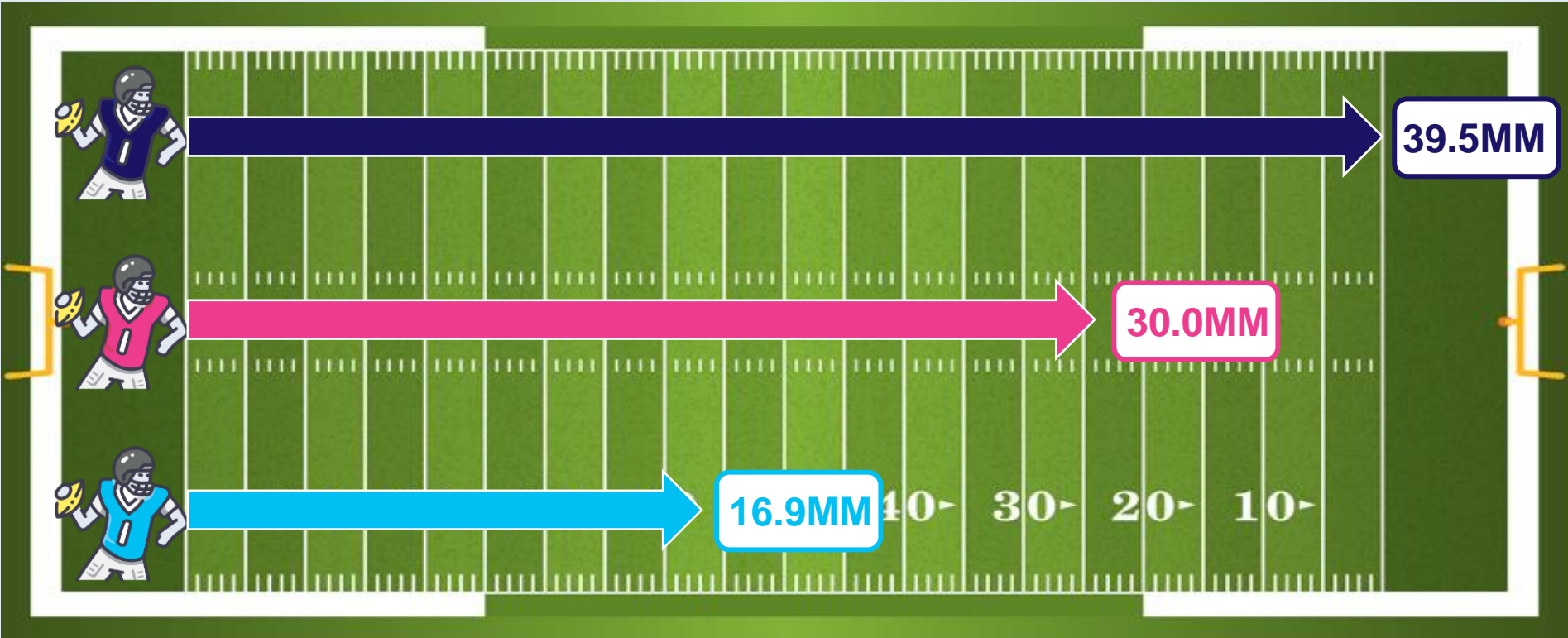
9.6MM

Source: VAB analysis of Nielsen NPower PowerPlay Program Report and R&F Program Report, Sunday Night Football (NBC, Universo), Monday Night Football (ESPN, ESPN2, ESPN Deportes, ABC) and Thursday Night Football (Amazon (incl. local broadcast for in-game markets only)), excludes pre- & post-game shows, Live+SD, P2+. **NBC, Universo, ESPN, ESPN2, ESPN Deportes and ABC reflects linear TV audience only and does not include audiences gained from their digital / app streaming.** The 15 comparable games reflect all weeks that have Amazon Thursday Night Football broadcasts across NFL weeks: 2-11 & 13-17 (excludes Thanksgiving weekend). NBC Sunday Night Football includes Universo simulcast viewership. ESPN Monday Night Football includes ESPN2 and ESPN Deportes simulcast viewership. Note: ESPN MNF data also includes ABC data when shown on both ESPN & ABC (weeks 3,15 and 17) and reflects only ABC for week 2 (9/19/22) due to a staggered doubleheader that night when each game partially overlapped each other. See [appendix](#) for schedule and single game details.

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Much like we saw with the 2021 TNF comparison, games available across broadcast & cable TV networks also garnered much higher reach than streaming-exclusive games

Average Weekly Reach – 2022 NFL Night Games
Comparable Weeks (NFL Weeks 2-11 & 13-17)



Source: VAB analysis of Nielsen NPower R&F Program Report, Sunday Night Football (NBC, Universo), Monday Night Football (ESPN, ESPN2, ESPN Deportes, ABC) and Thursday Night Football (Amazon (incl. local broadcast for in-game markets only)), excludes pre- & post-game shows, Live+SD, P2+. **NBC, Universo, ESPN, ESPN2, ESPN Deportes and ABC reflects linear TV audience only and does not include audiences gained from their digital / app streaming.** The 15 comparable games reflect all weeks that have Amazon Thursday Night Football broadcasts across NFL weeks: 2-11 & 13-17 (excludes Thanksgiving weekend). NBC Sunday Night Football includes Universo simulcast viewership. ESPN Monday Night Football includes ESPN2 and ESPN Deportes simulcast viewership. Note: ESPN MNF data also includes ABC data when shown on both ESPN & ABC (weeks 3,15 and 17) and reflects only ABC for week 2 (9/19/22) due to a staggered doubleheader that night when each game partially overlapped each other. See [appendix](#) for schedule and single game details.

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Thursday Night Football has the longest average viewer tune-in though, most likely due to the lower likelihood of ‘changing channels’ when streaming TV ‘in-app’

Average Weekly Minutes Viewed – 2022 NFL Night Games Comparable Weeks (NFL Weeks 2-11 & 13-17)



P2+

84.4

75.0

73.8

% of average game duration

45%

38%

37%

P18-34

86.9

81.0

79.4

% of average game duration

47%

41%

40%

Source: VAB analysis of Nielsen NPower R&F Program Report, Thursday Night Football (Amazon (incl. local broadcast for in-game markets only)), Sunday Night Football (NBC, Universo) and Monday Night Football (ESPN, ESPN2, ESPN Deportes, ABC), excludes pre- & post-game shows, Live+SD, P2+. **NBC, Universo, ESPN, ESPN2, ESPN Deportes and ABC reflects linear TV audience only and does not include audiences gained from their digital / app streaming.** The 15 comparable games reflect all weeks that have Amazon Thursday Night Football broadcasts across NFL weeks: 2-11 & 13-17 (excludes Thanksgiving weekend). NBC Sunday Night Football includes Universo simulcast viewership. ESPN Monday Night Football includes ESPN2 and ESPN Deportes simulcast viewership. Note: ESPN MNF data also includes ABC data when shown on both ESPN & ABC (weeks 3,15 and 17) and reflects only ABC for week 2 (9/19/22) due to a staggered doubleheader that night when each game partially overlapped each other. See [appendix](#) for schedule and single game details. ESPN Monday Night Football excludes Week 17 since the game was suspended in the first quarter due to injury.

7

Streaming viewership for Thursday Night Football is more likely to skew towards younger adults

Weekly Averages - 2022 NFL Night Games

Comparable Weeks (NFL Weeks 2-11 & 13-17)

Demo	Average Minute Audience (000)		
	Amazon Thursday Night Football	NBC Sunday Night Football	ESPN/ABC Monday Night Football
P13-24	661	1,030	766
P18-34	2,106	2,384	2,015
P18-49	4,694	6,277	5,053
P25-54	4,980	7,187	5,726

Reach (000)		
Amazon Thursday Night Football	NBC Sunday Night Football	ESPN/ABC Monday Night Football
1,105	1,942	1,492
2,964	4,115	3,630
7,229	12,035	9,967
7,988	14,494	11,747

P18-34 comp % of total audience / reach:	22%	14%	15%	18%	10%	12%
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Source: VAB analysis of Nielsen Npower PowerPlay Program Report and R&F Program Report, Thursday Night Football (Amazon (incl. local broadcast for in-game markets only)), Sunday Night Football (NBC, Universo) and Monday Night Football (ESPN, ESPN2, ESPN Deportes, ABC) excludes pre- & post-game shows, Live+SD, P2+. **NBC, Universo, ESPN, ESPN2, ESPN Deportes and ABC reflects linear TV audience only and does not include audiences gained from their digital / app streaming.** The 15 comparable games reflect all weeks that have Amazon Thursday Night Football broadcasts across NFL weeks: 2-11 & 13-17 (excludes Thanksgiving weekend). NBC Sunday Night Football includes Universo simulcast viewership. ESPN Monday Night Football includes ESPN2 and ESPN Deportes simulcast viewership. Note: ESPN MNF data also includes ABC data when shown on both ESPN & ABC (weeks 3,15 and 17) and reflects only ABC for week 2 (9/19/22) due to a staggered doubleheader that night when each game partially overlapped each other. See appendix for schedule and single game details.

8

Linear TV networks deliver many more viewers to their Spanish language coverage of Sunday Night & Monday Night Football games

Average Weekly Reach on Spanish Language Channels – 2022 NFL Night Games Comparable Weeks (NFL Weeks 2-11 & 13-17)



(Amazon in Spanish)



(Universo)



(ESPN Deportes)

P2+

41.2K

183.6K

225.1K

Source: VAB analysis of Nielsen NPower R&F Program Report, Sunday Night Football (Universo), Monday Night Football (ESPN Deportes) and Thursday Night Football (Amazon Spanish), excludes pre- & post-game shows, Live+SD, P2+. **Universo and ESPN Deportes linear TV audience only and does not include audiences gained from their digital / app streaming.** The 15 comparable games reflect all weeks that have Amazon Thursday Night Football broadcasts across NFL weeks: 2-11 & 13-17 (excludes Thanksgiving weekend).

Key Implications for Marketers

- ▶ **Streaming exclusivity of sports doesn't drive nearly** the total audience of TV networks which utilize their cross-platform access points including broadcast TV, cable TV and streaming
- ▶ A holistic video approach to sports is advantageous due the benefits that can be provided by each platform
 - ▶ Multiscreen TV that encompasses linear TV and streaming typically delivers higher reach, a larger total audience and multicultural demos in greater numbers
 - ▶ Streaming exclusivity can deliver a higher engaged **audience within an 'in-app' TV experience and skew** towards younger demos

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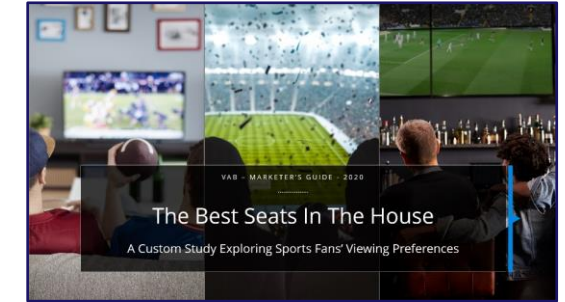
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Appendix:

Amazon Thursday Night Football Schedule
and Weekly NFL Night Games Analysis



Amazon's 2022 Thursday Night Football Schedule

► The 2022 season represented the first year of a 11-year deal that Amazon signed with the NFL to exclusive distribution of Thursday Night Football Games throughout the season

2022 Thursday Night Football Schedule

Week 2	September 15	Chargers @Chiefs
Week 3	September 22	Steelers @Browns
Week 4	September 29	Dolphins @Bengals
Week 5	October 6	Colts @Broncos
Week 6	October 13	Commanders @Bears
Week 7	October 20	Saints @Cardinals
Week 8	October 27	Ravens @Buccaneers
Week 9	November 3	Eagles @Texans
Week 10	November 10	Falcons @Panthers
Week 11	November 17	Titans @Packers
Week 13	December 1	Bills @Patriots
Week 14	December 8	Raiders @Rams
Week 15	December 15	49ers @Seahawks
Week 16	December 22	Jaguars @Jets
Week 17	December 29	Cowboys @Titans

Source: Amazon - Thursday Night Football Schedule

2021 vs. 2022: Thursday Night Football Comparison (FOX + FOX Deportes / NFL Network vs. Amazon Streaming)

2021 vs. 2022: NFL Thursday Night Football Comparison

Game	Matchup	Average Minute Audience (000)		
		2021	2022	YoY Change %
Week 2 (9/15/22)	Chargers @Chiefs vs. (9/16/21) Cowboys @Buccaneers	8,842	13,030	+47%
Week 3 (9/22/22)	Steelers @Browns vs. (9/23/21) Giants @Washington Football Team	7,963	11,029	+39%
Week 4 (9/29/22)	Dolphins @Bengals vs. (9/30/21) Jaguars @Bengals	8,568	11,722	+37%
Week 5 (10/6/22)	Colts @Broncos vs. (10/7/21) Rams @Seahawks	14,940	9,700	-35%
Week 6 (10/13/22)	Commanders @Bears vs. (10/14/21) Buccaneers @Eagles	14,607	8,785	-40%
Week 7 (10/20/22)	Saints @Cardinals vs. (10/21/21) Broncos @Browns	13,187	7,825	-41%
Week 8 (10/27/22)	Ravens @Buccaneers vs. (10/28/21) Packers @Cardinals	20,498	10,011	-51%
Week 9 (11/3/22)	Eagles @Texans vs. (11/4/21) Jets @Colts	11,837	7,857	-34%
Week 10 (11/10/22)	Falcons @Panthers vs. (11/11/21) Ravens @Dolphins	13,097	6,803	-48%
Week 11 (11/17/22)	Titans @Packers vs. (11/18/21) Patriots @Falcons	13,711	10,321	-25%
Week 13 (12/1/22)	Bills @Patriots vs. (12/2/21) Cowboys @Saints	16,929	9,972	-41%
Week 14 (12/8/22)	Raiders @Rams vs. (12/9/21) Steelers @Vikings	14,222	8,264	-42%
Week 15 (12/15/22)	49ers @Seahawks vs. (12/16/21) Chiefs @Chargers	18,067	10,312	-43%
Week 16 (12/22/22)	Jaguars @Jets vs. (12/23/21) 49ers @Titans	8,603	8,264	-4%
Week 17 (12/29/22)	Cowboys @Titans (No week 17 game in 2021)	N/A	9,726	N/A
Average		13,219	9,574	-28%

Reach (000)		
2021	2022	YoY Change %
18,410	20,712	+13%
16,895	18,926	+12%
17,876	19,584	+10%
32,400	18,248	-44%
33,476	16,278	-51%
31,205	14,403	-54%
39,736	17,948	-55%
29,214	14,770	-49%
29,506	13,361	-55%
30,594	17,540	-43%
35,319	17,497	-50%
32,763	15,399	-53%
35,711	17,659	-51%
16,820	15,119	-10%
N/A	16,572	N/A
28,566	16,934	-41%

Source: VAB analysis of Nielsen NPower Powerplay and R&F Program Report, 2021 Season: FOX, FOX Deportes & NFL Network; 2022 Season: Amazon & local broadcast for in-game markets only (excludes pre- & post-game shows), Live+SD, P2+. **FOX, FOX Deportes & NFL Network reflects linear TV audience only and does not include audiences gained from their digital / app streaming.** 2021 reflects 14 games total (4 NFL Network only games: Weeks 2-4 & 16: 10 games with Fox / Fox Deportes, NFL Network & Amazon: Weeks 5-11 & 13-15). 2021 audience figures excludes Amazon since the platform was not measured by Nielsen in 2021. 2022 reflects 15 games total, streaming by Amazon (Weeks 2-11 & 13-17). *See appendix for schedule and single game details. Analysis reflects only those games played on Thursday Night.

2022 NFL Night Games – 15-Week individual game comparison

2022 NFL Night Games – Comparable Games

Game	Average Minute Audience (000)		
	Amazon Thursday Night Football	NBC* Sunday Night Football	ESPN/ABC** Monday Night Football
Week 2	13,030	19,571	12,859
Week 3	11,029	17,836	19,401
Week 4	11,722	20,878	12,554
Week 5	9,700	15,897	15,888
Week 6	8,785	20,875	12,119
Week 7	7,825	15,543	11,874
Week 8	10,011	19,633	11,335
Week 9	7,857	17,759	10,566
Week 10	6,803	15,877	12,825
Week 11	10,321	17,951	11,320
Week 13	9,972	18,178	11,323
Week 14	8,264	15,789	10,296
Week 15	10,312	15,390	16,063
Week 16	8,264	17,165	10,985
Week 17	9,727	17,213	23,859
15-Game Average	9,575	17,704	13,551

Game	Reach (000)		
	Amazon Thursday Night Football	NBC* Sunday Night Football	ESPN/ABC** Monday Night Football
Week 2	20,712	41,672	34,672
Week 3	18,926	40,582	43,056
Week 4	19,584	44,347	27,136
Week 5	18,248	37,088	31,075
Week 6	16,278	45,198	27,520
Week 7	14,403	37,430	27,019
Week 8	17,948	42,838	26,490
Week 9	14,770	40,737	24,851
Week 10	13,361	36,333	27,072
Week 11	17,540	39,732	25,456
Week 13	17,497	40,259	25,851
Week 14	15,399	37,959	25,047
Week 15	17,659	36,375	38,161
Week 16	15,119	33,831	22,787
Week 17	16,572	38,274	43,961
15-Game Average	16,934	39,510	30,010

Source: VAB analysis of Nielsen Npower PowerPlay Program Report and R&F Program Report, Sunday Night Football (NBC, Universo), Monday Night Football (ESPN, ESPN2, ESPN Deportes, ABC) and Thursday Night Football (Amazon (incl. local broadcast for in-game markets only)), excludes pre- & post-game shows, Live+SD, P2+. **NBC, Universo, ESPN, ESPN2, ESPN Deportes and ABC reflects linear TV audience only and does not include audiences gained from their digital / app streaming.** The 15 comparable games reflect all weeks that have Amazon Thursday Night Football broadcasts across NFL weeks: 2-11 & 13-17 (excludes Thanksgiving weekend). *NBC Sunday Night Football includes Universo simulcast viewership. **ESPN Monday Night Football includes ESPN2 and ESPN Deportes simulcast viewership. Note: ESPN MNF data also includes ABC data when shown on both ESPN & ABC (weeks 3,15 and 17) and reflects only ABC for week 2 (9/19/22) due to a staggered doubleheader that night when each game partially overlapped each other. See [appendix](#) for schedule and single game details.