
2020

What's The Spread?

NFL On Amazon In-Game Stream vs.
TV Audience Comparison

2019 Season



The Box Score For 2019 NFL Thursday Night Football

- ▶ Three Key Takeaways From Our Comparable Analysis Between Amazon Streaming Vs. Linear TV



Football Isn't A Zero-Sum Game

- ▶ More access points across more devices leads to more viewers
- ▶ In fact, both Amazon streaming and linear TV's viewership was up this season vs. last



Linear TV Dominates

- ▶ On average, the linear TV audience was 24x the size of Amazon streaming's audience
- ▶ Amazon streaming's average audience reflected only 4.2% that of the linear TV audience



Viewership Ebbs & Flows

- ▶ Amazon achieved it's highest viewership during it's first streamed game and lowest on Halloween but varied otherwise due mainly to the collective market size of the teams playing
- ▶ TV's audience range was much more steady and variances aligned closer to individual game competitiveness and team popularity

Amazon's Thursday Night Football Schedule

- ▶ The 2019 season represented the second year of a two-year deal that Amazon signed with the NFL to live-stream 11 Thursday Night Football Games throughout the season in conjunction with linear TV coverage

2019 Schedule

11 Thursday Night Games

Week 4	26-Sep	Philadelphia Eagles @ Green Bay Packers
Week 5	3-Oct	Los Angeles Rams @ Seattle Seahawks
Week 6	10-Oct	New York Giants @ New England Patriots
Week 7	17-Oct	Kansas City Chiefs @ Denver Broncos
Week 8	24-Oct	Washington Redskins @ Minnesota Vikings
Week 9	31-Oct	San Francisco 49ers @ Arizona Cardinals
Week 10	7-Nov	Los Angeles Chargers @ Oakland Raiders
Week 11	14-Nov	Pittsburgh Steelers @ Cleveland Browns
Week 12	21-Nov	Indianapolis Colts @ Houston Texans
Week 14	5-Dec	Dallas Cowboys @ Chicago Bears
Week 15	12-Dec	New York Jets @ Baltimore Ravens

The NFL Has Publicly Released Amazon Streaming Viewership Figures For Seven Games Which Is What Our Comparative Analysis Is Based On

► Analysis focuses on key 'average audience' viewership metrics between Amazon and Linear TV

2019 Schedule

11 Thursday Night Games

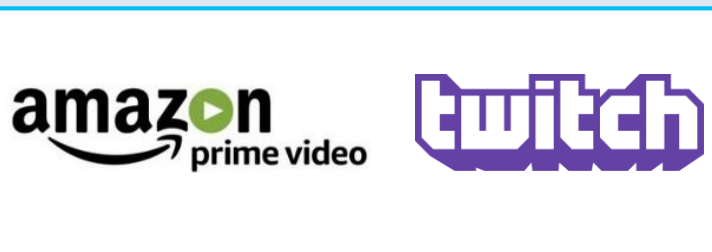
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Week 8	24-Oct	Washington Redskins @ Minnesota Vikings
Week 9	31-Oct	San Francisco 49ers @ Arizona Cardinals
Week 10	7-Nov	Los Angeles Chargers @ Oakland Raiders
Week 11	14-Nov	Pittsburgh Steelers @ Cleveland Browns
Week 12	21-Nov	Indianapolis Colts @ Houston Texans
Week 14	5-Dec	Dallas Cowboys @ Chicago Bears
Week 15	12-Dec	New York Jets @ Baltimore Ravens

Source: VAB analysis of verified Amazon data as reported via NFL Communications press releases (9/27/19, 10/11/19, 10/18/19, 10/25/19, 11/1/19, 11/15/19, 12/6/19)

Analysis Note: Understanding The Key Distinctions In Viewership Metrics

- ▶ When comparing the average audience size across platforms, it is important to first understand the differences in measurement and viewership universe

Amazon Properties



Geography

Global
(200+ countries)

Viewer Measurement

Across All Platforms

Viewer Count Threshold

Counted after :30s
of viewing

Linear TV



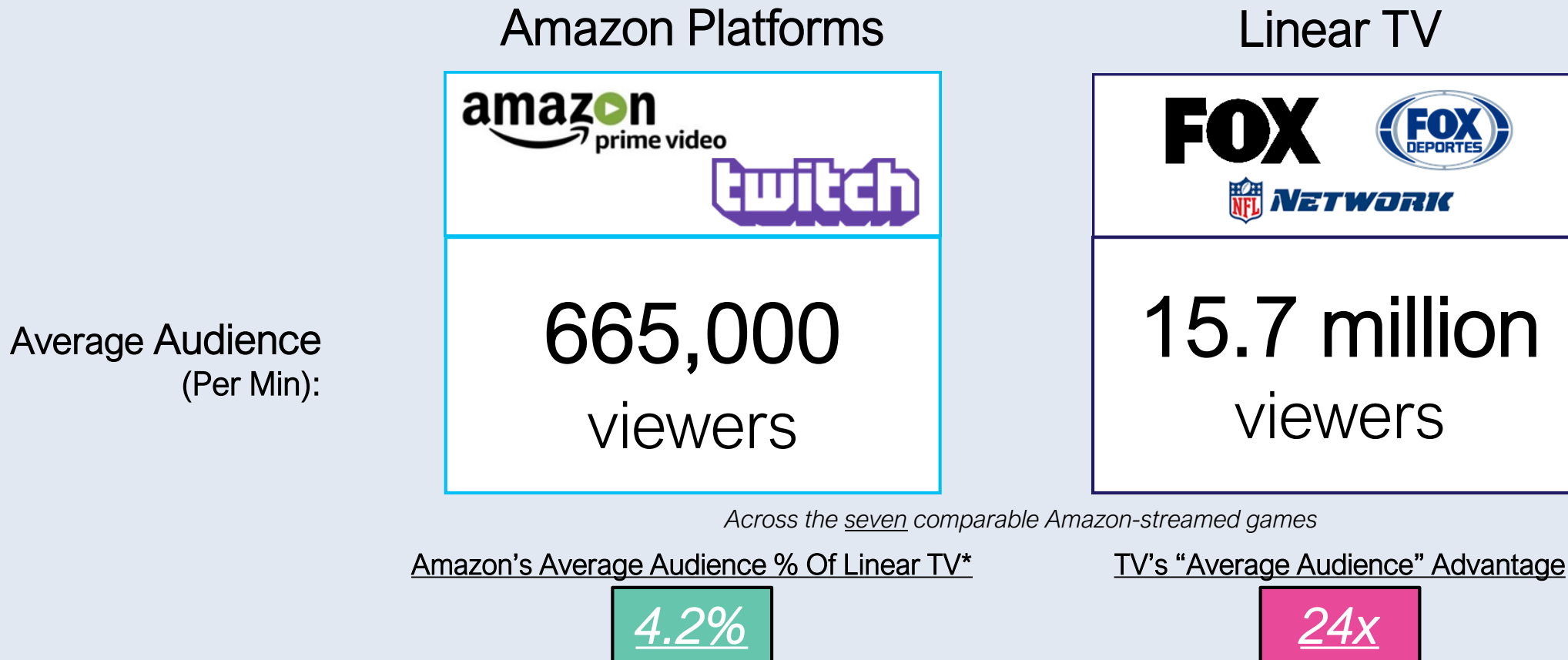
U.S. Only

Linear TV Viewing Only
Does Not Include Their Digital
Platforms or Streaming Apps

Counted after :60s
of viewing

On Average, Linear TV Delivered 24x The Average Audience Than Amazon's Streaming Properties Across Seven Comparable NFL Thursday Night Games

▶ Amazon's average audience was slightly over 4% that of linear TV



Across the seven comparable Amazon-streamed games

* Calculated by dividing Amazon Prime Video & Twitch average audience into Linear TV average audience

Source: VAB analysis of verified Amazon data as reported via NFL Communications press release (9/27/19, 10/11/19, 10/18/19, 10/25/19, 11/1/19, 11/15/19, 12/6/19); reflects in-game only; VAB analysis of Nielsen NPower Powerplay and R&F Program Report, FOX, FOX Deportes & NFL Network, in-game only (excludes pre- & post-game shows), Live+SD, P2+. TV viewership figures based on anyone who "viewed for a minimum of one minute." FOX, FOX Deportes & NFL Network reflects TV audience only and does not include audiences gained from their digital / app streaming. The 7 reported Amazon-streamed games reported games represent: 9/26/19, 10/10/19, 10/17/19, 10/24/19, 10/31/19, 11/14/19, 12/5/19

From A Year-Over-Year Perspective, Linear TV Achieved Double-Digit Audience Growth Even With Amazon Streaming's Increased Viewership

▶ Linear TV's average audience was up +14% YOY in comparable games while Amazon was up +38%

Average across seven comparable Amazon-streamed games

Linear TV



2018 Season

13.8 million

Average Audience (per min)

2019 Season

15.7 million

Average Audience (per min)

+14%
vs. 2018 season

Amazon Platforms



482,000

Average Audience (per min)

665,000

Average Audience (per min)

+38%
vs. 2018 season

Source: Amazon data - for 2019 season, VAB analysis of verified Amazon data as reported via NFL Communications press release (9/27/19, 10/11/19, 10/18/19, 10/25/19, 11/1/19, 11/15/19, 12/6/19); for 2018 season, VAB analysis of verified Amazon data as reported via NFL Communication press releases and supported by Sporttechie.com (11/12/18); reflects in-game only. Linear TV data – VAB analysis of Nielsen NPower Powerplay and R&F Program Report, FOX, FOX Deportes & NFL Network, in-game only (excludes pre- & post-game shows), Live+SD, P2+. TV viewership figures based on anyone who "viewed for a minimum of one minute." FOX, FOX Deportes & NFL Network reflects TV audience only and does not include audiences gained from their digital / app streaming. The seven reported Amazon-streamed games reflect: 9/26/19, 10/10/19, 10/17/19, 10/24/19, 10/31/19, 11/14/19, 12/5/19 for the 2019 season and 9/27/18, 10/11/18, 10/18/18, 10/25/18, 11/1/18, 11/15/18, 12/13/18 for the 2018 season.

Amazon/Twitch Vs. Linear TV

Individual Game Analysis:

Viewership Metrics For The Seven
Comparable Thursday Night NFL Games



Amazon Achieved It's Highest Viewership In It's First-Streamed Game While Linear TV Aligned More With Game Competitiveness And Team Popularity

► Beyond the average audience, linear TV viewers spent much more time watching each game

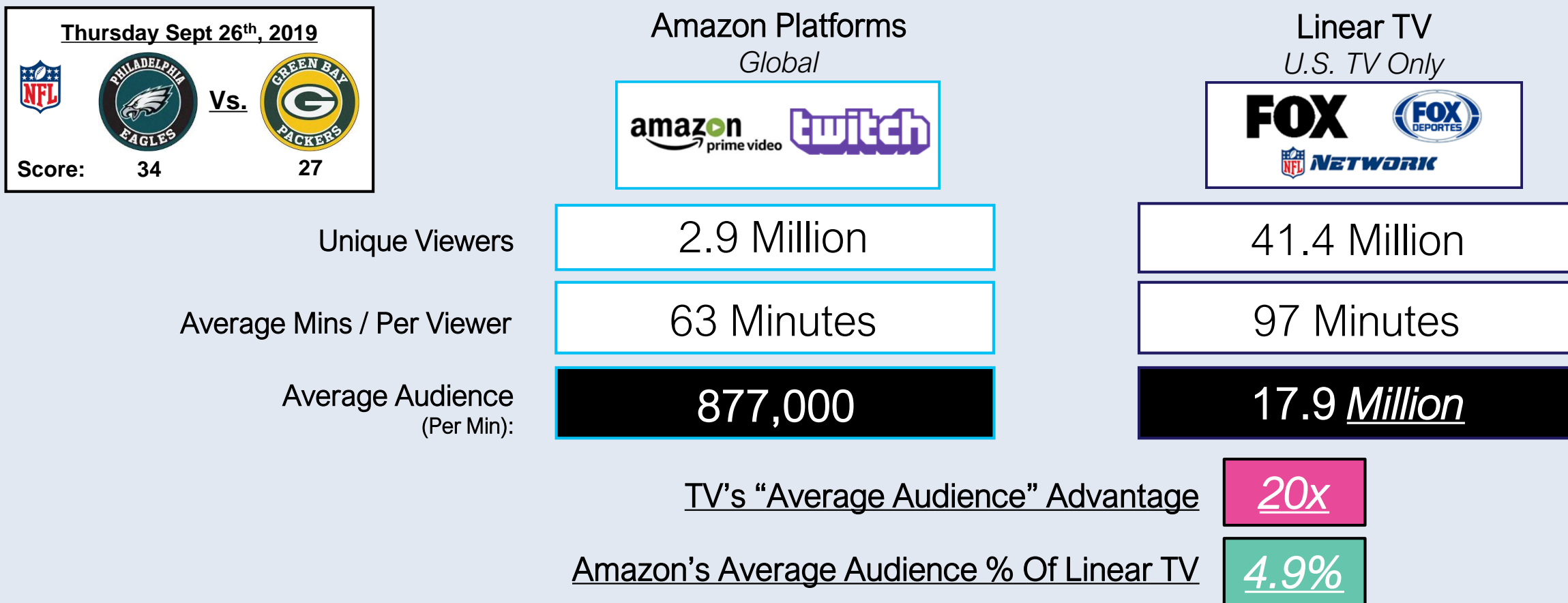
Game	Average Minute Audience			Amazon's Average Audience % Of Linear TV*	Average Mins Viewed Per Viewer		
	amazon prime video twitch	FOX NETWORK	TV's Advantage		amazon prime video twitch	FOX NETWORK	TV's Advantage
Week 4 (9/26/19) Eagles @ Packers	877,000	17.9 Million	20X	4.9%	63 Mins	97 Mins	+55%
Week 6 (10/10/19) Giants @ Patriots	766,000	16.3 Million	21X	4.7%	55 Mins	71 Mins	+30%
Week 7 (10/17/19) Chiefs @ Broncos	640,000	13.9 Million	22X	4.6%	44 Mins	66 Mins	+51%
Week 8 (10/24/19) Redskins @ Vikings	571,000	13.7 Million	24X	4.2%	45 Mins	63 Mins	+41%
Week 9 (10/31/19) 49ers @ Cardinals	435,000	14.2 Million	33X	3.1%	51 Mins	73 Mins	+60%
Week 11 (11/14/19) Steelers @ Browns	642,000	15.6 Million	24X	4.1%	50 Mins	80 Mins	+60%
Week 14 (12/5/19) Cowboys @ Bears	696,000	18.2 Million	26X	3.8%	42 Mins	76 Mins	+82%
7-Game Average	665,000	15.7 Million	24X	4.2%	50 Mins	75 Mins	+51%

*Average Audience figures above excludes approximately 400K from FOX Sports digital, NFL digital and Yahoo Sports digital platforms

Source: VAB analysis of verified Amazon data as reported via NFL Communications press releases (9/27/19, 10/11/19, 10/18/19, 10/25/19, 11/1/19, 11/15/19, 12/6/19); in-game only, Amazon viewership figures based on anyone who "viewed for at least 30 seconds;" average minutes viewed estimated based on audience data and game time length. VAB analysis of Nielsen NPower Powerplay and R&F Program Report, FOX, FOX Deportes & NFL Network, in-game only (excludes pre- & post-game shows), Live+SD, P2+. TV viewership figures based on anyone who "viewed for a minimum of one minute." FOX, FOX Deportes & NFL Network reflects TV audience only and does not include audiences gained from their digital / app streaming. 7-Game Average represents a weighted average based on program duration.

In The First Amazon Live-Stream Game During Week Four, Linear TV Delivered 20x The Audience In Any Given Minute Than Amazon's Streaming Properties

▶ Amazon's average audience was less than 5% that of linear TV



*Average Audience figures above excludes approximately 520K from FOX Sports digital, NFL digital and Yahoo Sports digital platforms

Source: VAB analysis of verified Amazon data as reported via NFL Communications press release (9/27/19); in-game only, Amazon viewership figures based on anyone who "viewed for at least 30 seconds;" average minutes viewed estimated based on audience data and game time length. VAB analysis of Nielsen NPower Powerplay and R&F Program Report, FOX, FOX Deportes & NFL Network, in-game only (excludes pre- & post-game shows), Live+SD, P2+. TV viewership figures based on anyone who "viewed for a minimum of one minute." FOX, FOX Deportes & NFL Network reflects TV audience only and does not include audiences gained from their digital / app streaming. All digital platforms combined (Amazon, Twitch, Yahoo, NFL digital and Fox Digital) had a reported average audience of 1,400,000.

In Week Six Of The Season, Linear TV Delivered 21x The Audience With Slightly Lower Average Viewership Across Platforms For A Less Competitive Game

► Amazon's average audience was less than 5% that of linear TV

Thursday Oct 10th, 2019



Score: **14** vs. **35**

Amazon Platforms
Global



Linear TV
U.S. TV Only



Unique Viewers

2.6 Million

39.5 Million

Average Mins / Per Viewer

62 Minutes

71 Minutes

Average Audience
(Per Min):

766,000

16.3 *Million*

TV's "Average Audience" Advantage

21x

Amazon's Average Audience % Of Linear TV

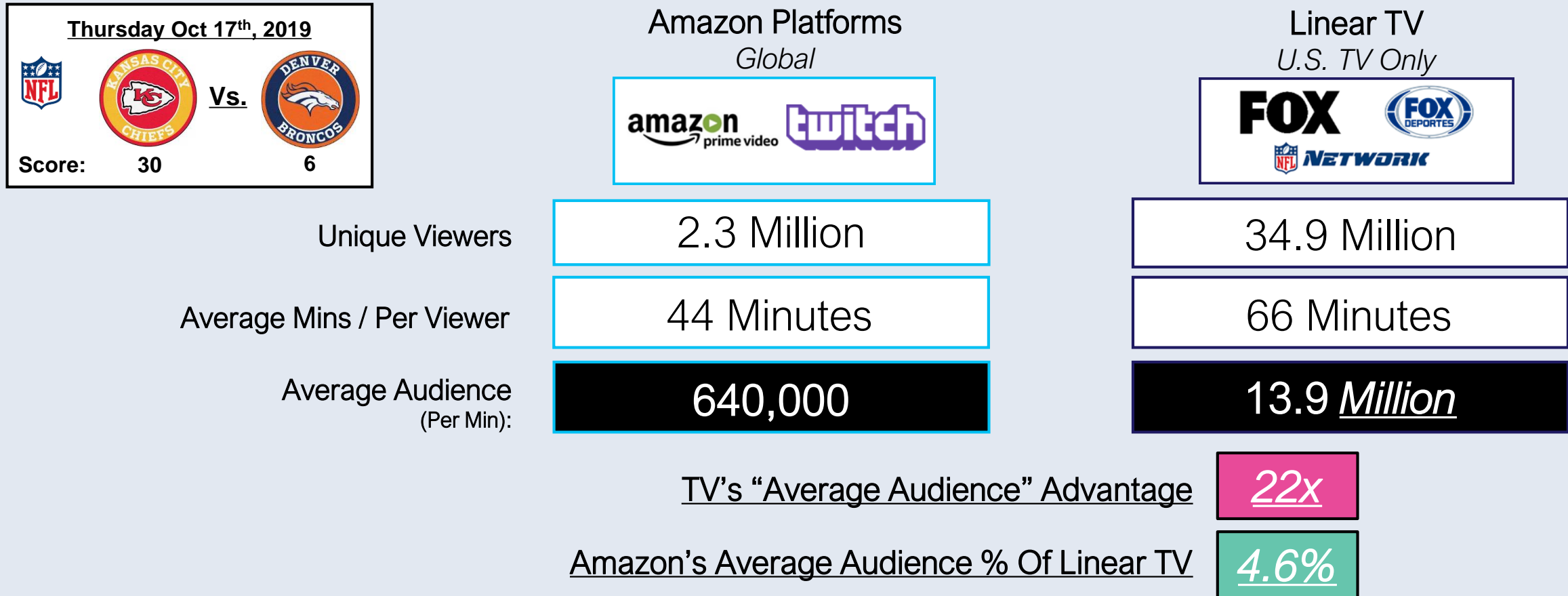
4.7%

*Average Audience figures above excludes approximately 430K from FOX Sports digital, NFL digital and Yahoo Sports digital platforms

Source: VAB analysis of verified Amazon data as reported via NFL Communications press release (10/11/19); in-game only, Amazon viewership figures based on anyone who "viewed for at least 30 seconds;" average minutes viewed estimated based on audience data and game time length. VAB analysis of Nielsen NPower Powerplay and R&F Program Report, FOX, FOX Deportes & NFL Network, in-game only (excludes pre- & post-game shows), Live+SD, P2+. TV viewership figures based on anyone who "viewed for a minimum of one minute." FOX, FOX Deportes & NFL Network reflects TV audience only and does not include audiences gained from their digital / app streaming. All digital platforms combined (Amazon, Twitch, Yahoo, NFL digital and Fox Digital) had a reported average audience of 1,200,000.

In Week Seven, Linear TV's Advantage Held Steady Against Amazon Properties As Audiences Dipped Equally Across Platforms For A Non-Competitive Game

► Amazon's average audience was slightly over 4.5% that of linear TV



*Average Audience figures above excludes approximately 360K from FOX Sports digital, NFL digital and Yahoo Sports digital platforms

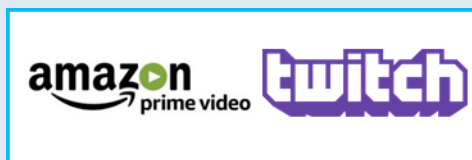
Source: VAB analysis of verified Amazon data as reported via NFL Communications press release (10/18/19); in-game only, Amazon viewership figures based on anyone who "viewed for at least 30 seconds;" average minutes viewed estimated based on audience data and game time length. VAB analysis of Nielsen NPower Powerplay and R&F Program Report, FOX, FOX Deportes & NFL Network, in-game only (excludes pre- & post-game shows), Live+SD, P2+. TV viewership figures based on anyone who "viewed for a minimum of one minute." FOX, FOX Deportes & NFL Network reflects TV audience only and does not include audiences gained from their digital / app streaming. All digital platforms combined (Amazon, Twitch, Yahoo, NFL digital and Fox Digital) had a reported average audience of 1,000,000.

In Week Eight, A Low Scoring Match-up Led To Lower Amazon Viewership Than Previous Weeks And A 24x Average Audience Advantage For Linear TV

► Amazon's average audience was slightly over 4% that of linear TV



Amazon Platforms
Global



Linear TV
U.S. TV Only



Unique Viewers

2.0 Million

35.0 Million

Average Mins / Per Viewer

45 Minutes

63 Minutes

Average Audience
(Per Min):

571,000

13.7 Million

TV's "Average Audience" Advantage

24x

Amazon's Average Audience % Of Linear TV

4.2%

*Average Audience figures above excludes approximately 330K from FOX Sports digital, NFL digital and Yahoo Sports digital platforms

Source: VAB analysis of verified Amazon data as reported via NFL Communications press release (10/25/19); in-game only, Amazon viewership figures based on anyone who "viewed for at least 30 seconds;" average minutes viewed estimated based on audience data and game time length. VAB analysis of Nielsen NPower Powerplay and R&F Program Report, FOX, FOX Deportes & NFL Network, in-game only (excludes pre- & post-game shows), Live+SD, P2+. TV viewership figures based on anyone who "viewed for a minimum of one minute." FOX, FOX Deportes & NFL Network reflects TV audience only and does not include audiences gained from their digital / app streaming. All digital platforms combined (Amazon, Twitch, Yahoo, NFL digital and Fox Digital) had a reported average audience of 910,000.

In Week Nine, Halloween Night Witnessed Amazon's Lowest Viewership Of The Season While Linear TV's Average Audience Held Very Steady

▶ Amazon's average audience was slightly over 3% that of linear TV

Thursday Oct 31st, 2019




Vs.



Score: 28 vs 25

Amazon Platforms Global



Linear TV U.S. TV Only



Unique Viewers

1.6 Million

37.9 Million

Average Mins / Per Viewer

51 Minutes

73 Minutes

Average Audience
(Per Min):

435,000

14.2 *Million*

TV's "Average Audience" Advantage

33x

Amazon's Average Audience % Of Linear TV

3.1%

*Average Audience figures above excludes approximately 370K from FOX Sports digital, NFL digital and Yahoo Sports digital platforms

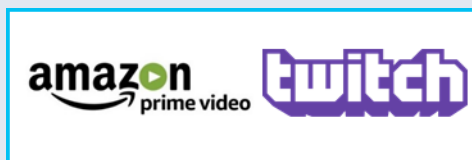
Source: VAB analysis of verified Amazon data as reported via NFL Communications press release (11/1/19); in-game only, Amazon viewership figures based on anyone who "viewed for at least 30 seconds;" average minutes viewed estimated based on audience data and game time length. VAB analysis of Nielsen NPower Powerplay and R&F Program Report, FOX, FOX Deportes & NFL Network, in-game only (excludes pre- & post-game shows), Live+SD, P2+. TV viewership figures based on anyone who "viewed for a minimum of one minute." FOX, FOX Deportes & NFL Network reflects TV audience only and does not include audiences gained from their digital / app streaming. All digital platforms combined (Amazon, Twitch, Yahoo, NFL digital and Fox Digital) had a reported average audience of 808,000.

In Week 11, Linear TV Delivered 24x The Audience Amazon Properties Which Was On Par For The Overall Comparative Game Average Across The Analysis

► Amazon's average audience was slightly over 4% that of linear TV



Amazon Platforms Global



Linear TV U.S. TV Only



Unique Viewers

2.4 Million

37.6 Million

Average Mins / Per Viewer

50 Minutes

80 Minutes

Average Audience
(Per Min):

642,000

15.6 *Million*

TV's "Average Audience" Advantage

24x

Amazon's Average Audience % Of Linear TV

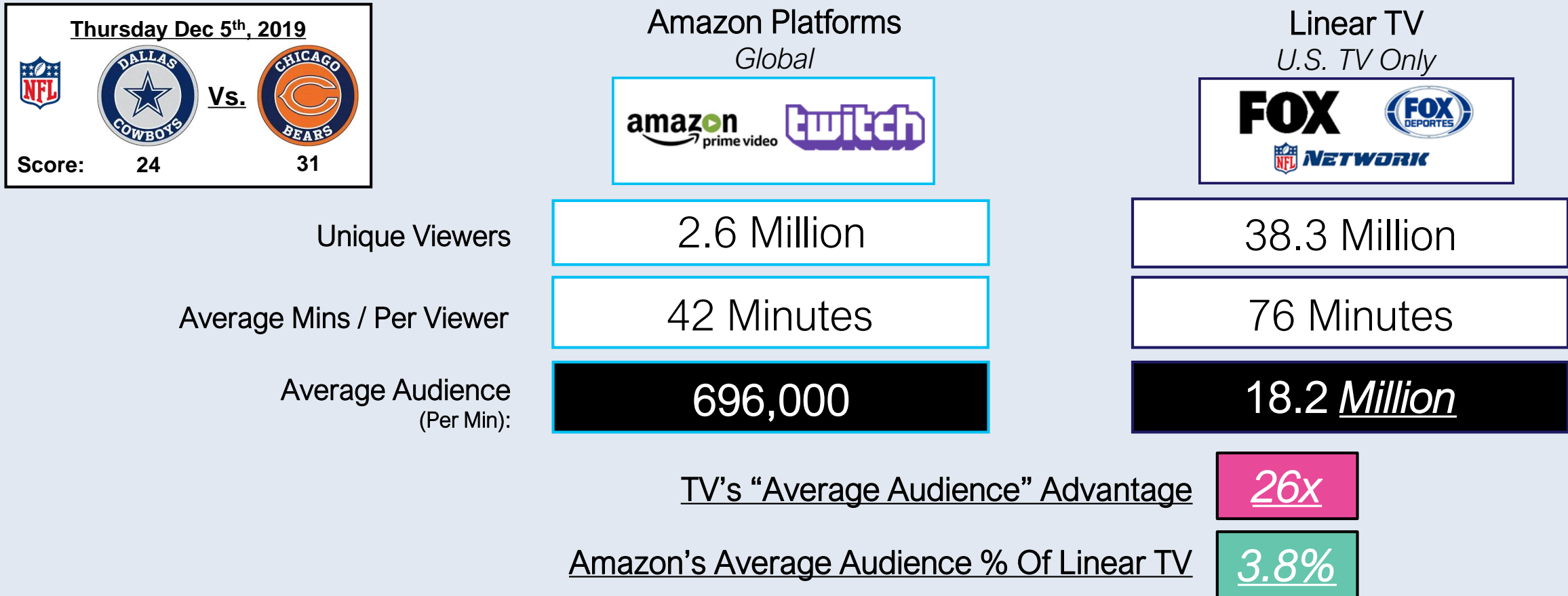
4.1%

*Average Audience figures above excludes approximately 350K from FOX Sports digital, NFL digital and Yahoo Sports digital platforms

Source: VAB analysis of verified Amazon data as reported via NFL Communications press release (11/15/19); in-game only, Amazon viewership figures based on anyone who "viewed for at least 30 seconds;" average minutes viewed estimated based on audience data and game time length. VAB analysis of Nielsen NPower Powerplay and R&F Program Report, FOX, FOX Deportes & NFL Network, in-game only (excludes pre- & post-game shows), Live+SD, P2+. TV viewership figures based on anyone who "viewed for a minimum of one minute." FOX, FOX Deportes & NFL Network reflects TV audience only and does not include audiences gained from their digital / app streaming. All digital platforms combined (Amazon, Twitch, Yahoo, NFL digital and Fox Digital) had a reported average audience of 1,000,000.

In Week 14, A Competitive Matchup Between Two Popular Teams Saw Linear TV Achieve It's Highest Average Audience Of Any Game Within The Analysis

► Amazon's average audience was less than 4% that of linear TV



*Average Audience figures above excludes approximately 400K from FOX Sports digital, NFL digital and Yahoo Sports digital platforms

Source: VAB analysis of verified Amazon data as reported via NFL Communications press release (12/6/19); in-game only, Amazon viewership figures based on anyone who "viewed for at least 30 seconds;" average minutes viewed estimated based on audience data and game time length. VAB analysis of Nielsen NPower Powerplay and R&F Program Report, FOX, FOX Deportes & NFL Network, in-game only (excludes pre- & post-game shows), Live+SD, P2+. TV viewership figures based on anyone who "viewed for a minimum of one minute." FOX, FOX Deportes & NFL Network reflects TV audience only and does not include audiences gained from their digital / app streaming. All digital platforms combined (Amazon, Twitch, Yahoo, NFL digital and Fox Digital) had a reported average audience of 1,100,000.

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