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Game Time: FAST & Live Sports Viewership

Live streaming of sports on
FAST has just kicked off



Featuring survey insights from
streaming media analyst **Dan Rayburn**

In this **edition**

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- Global and regional breakdowns

4. Survey: What execs say about the state of live sports programming in FAST

Dive into comprehensive data and insights powered by Amagi's homegrown data analytics platform – [Amagi ANALYTICS](#) and the Amagi Executive Survey 2024.

Analysis period

Q3 2024 (Jul-Sep) vs. Q3 2023 (Jul-Sep)

In the 13th edition of the Amagi Global FAST Report, we focus on the global market and bring data and insights from 2,800+ channels distributed that use [Amagi THUNDERSTORM](#), our SSAI (Server-Side Ad Insertion) platform. We understand that this is not a universal data set of all FAST channels and FAST services. But in the absence of reliable third-party data sources, we hope this report provides directional guidance to content providers, FAST streaming services and advertisers.

The report also provides insights, business preferences and future predictions from our 128-person survey of streaming, broadcast and sports executives.



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Introduction: The pivotal role of live sports in streaming and linear television



Live sports, especially the NFL, continues to dominate the traditional broadcast and cable TV ecosystem. Of the 100 most-watched U.S. TV broadcasts in 2023, [97 were sports-related](#).

But the number of viewers tuning in to watch live sports on TV has been in [decline year over year](#) as overall TV viewership continues to shift from traditional TV to streaming.

Noting this shift, sports content providers are now reevaluating their distribution tactics to align with viewer preferences – meaning more [sports programs are moving to streaming](#).

As those streaming services pivot more toward ad-supported business models, they also recognize that live sports serve them better than on-demand content when it comes to wooing advertising dollars to their services.

Recent moves include:

Netflix

- Acquisition of WWE rights
- Two upcoming NFL games on Christmas
- This past March's Alcaraz-Nadal tennis match

Amazon Prime Video

- Acquisition of NBA rights for the 2025-2026 season
- Continuation of existing NFL Thursday Night Football deal

Tier 1 sports content providers are benefitting from the entry of streaming services into live sports – and from streamers' willingness to pay higher prices than traditional TV networks. Why are they willing to pay more?

Because sports viewership on streaming is breaking records on a consistent basis:

NBCU

Led by Peacock, NBCU digital platforms' [coverage](#) of the 2024 Paris Olympics was up 40% from all prior Summer and Winter Olympics combined

40% ↑

Amazon Prime Video

Thursday Night Football [gained 24%](#) in total viewers in its second season

24% ↑

In addition to Tier 1 streaming services, live sports are expanding into other parts of the streaming ecosystem, especially Free Ad-supported Streaming TV (FAST), which is thematically similar to linear television. FAST services continue to seek sports programming to drive audience reach, differentiate their content offerings from other services, and ultimately, drive advertising dollars.

Beyond FAST channels, exclusive sports-themed FAST Services are also emerging – such as [Victory+](#) and [Free Live Sports](#) – which show free, ad-supported live sports.

Key strategic drivers fueling live streaming of sports on FAST channels



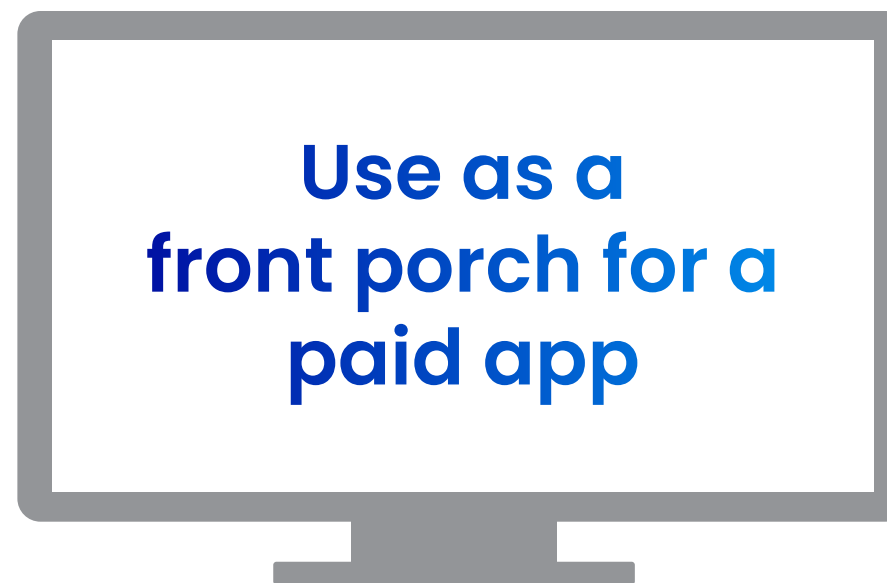
Example:
Tennis Channel's T2 FAST channel shows non-center court, live matches that aren't covered by their paid linear TV channel.



Example:
Tennis Channel has capitalized on pickleball's rise with Pickleballtv, making it a FAST channel instead of a paid linear channel with the hopes of growing audiences.



Example:
[VIZIO WatchFree+](#) streamed The Women's Cup, a prestigious women's professional club soccer tourney, exclusively this past August.



Example:
[DAZN](#) offers a wide variety of sports on its 10+ FAST channels that are offered as a free tier on its app, which also includes a paid tier of premium sports.



Example:
The NBA's G League TV on Tubi shows live games and related programming dedicated to promoting the G League.



Example:
The NHL's FAST channel engages fans through live pregame shows during the playoffs and through offseason programming.

Live sports' expansion into FAST and streaming will continue to drive growth/monetization opportunities for Tier 2/3 sports and niche sports leagues. Sports content producers and broadcasters wanting to grow their audience and stand out on FAST can do so through experiences like single live events and pop-up channels. Plus, actively programming live sports can help advertisers who are looking to aggregate viewers into a single location.

How does FAST fit in globally – and how can FAST services, content providers and advertisers serve viewers and monetize content?

While opportunities [continue to grow in sports streaming](#), there's a complexity of choice for viewers amongst free and paid platforms, and a need for a centralized experience. Live sports serve as a great catalyst to draw viewership to FAST.

The majority of the major sports leagues also have a FAST channel, including the NBA.



Sports and FAST

Spotlight: NBA

The NBA entered the FAST space last season with its NBA G League channel (“G League TV”) on Tubi. G League TV, now entering its second season on Tubi, has been a powerful way for the G League to reach new fans, flex its original programming capabilities, and drive meaningful viewership for live games. G League TV is a “pop-up” channel that is currently stood up on Fridays and Saturdays during the G League season, with four live games per week and dozens of hours of new compelling shoulder and ancillary content. Tubi’s expertise in content programming and willingness to lean into the partnership through promotion has been instrumental to G League TV’s success.

The NBA also launched the NBA FAST channel on Roku last spring. The league was focused on launching the NBA FAST channel in a way that would permit fans to use FAST as an “on-ramp” to the NBA App, NBA League Pass and live local and national NBA games. Roku was uniquely positioned to layer the NBA FAST channel into a broader NBA content experience on the platform that includes partner apps (e.g., ESPN, Max), VOD content (highlights, series, documentaries) and DTC products (NBA App and NBA League Pass) all in one place, the NBA Zone. From a programming perspective, the NBA has been able to complement and dive deeper into its tentpoles and storylines with the NBA FAST channel. The NBA intends to expand its FAST offering to more platforms in the future with an emphasis on platforms that can offer robust audience/viewership insights, innovative platform promotion and placement, and holistic NBA content experiences for fans.

Spotlight: DAZN



Recently, DAZN launched [10 FAST channels](#) to bring viewers more free content on their platform. This ‘front porch’ enables greater discoverability of FAST programming while driving brand awareness, loyalty, and retention. It also gives DAZN a ‘top of funnel’ of engaging content, which they can use to deliver audiences to pay tiers and other platform functionality, including betting and e-commerce (customers can purchase merchandize and tickets).

For DAZN, with the company using Amagi as the distribution and technology partner for the additional channels, it all comes down to providing a simple, captivating experience for viewers. DAZN plans to further integrate features which will enable them to best serve the audience engaging with these channels as they build an ultimate destination for all sports fans. EPG integration is underway, and they will also look to include other features like language localization options, to enable greater personalization and accessibility.

So far, so good – since launch, DAZN have had more than 1 million viewers engage with their FAST channels, delivering almost 300,000 hours of viewing.

Spotlight: Tennis Channel



Tennis Channel has also emerged at the [forefront of FAST](#), with enough content to power a second channel, T2, that [launched](#) in 2022 and a pickleball channel called Pickleball TV (PBTV), illustrating amplification of a new and emerging sport.

T2 has made more free, live tennis available to U.S. audiences per year than ever before in television. PBTV covers more than 30 top-level Professional Pickleball Association and Major League Pickleball team tournaments throughout the year, with more than 1,000 hours of live matches from the game’s biggest stars.

Spotlight: Virgin Media O2



Virgin Media O2 is curating FAST channels to help re-engage customers with Pay TV. They’ve found total monthly viewership minutes are comparable with a number of their Pay TV channels, and session duration times for the top 50% of their channels are nearly 90 minutes on average per viewer, with Chelsea vs. Barcelona on DAZN Women’s Football as the most watched show.

At Amagi’s London FAST conference this year, Virgin Media O2 Chief TV & Entertainment Officer David Bouchier had this to say about the growth:

“FAST is now available to millions of customers, providing an opportunity to leverage existing relationships with viewers and content owners. Through curated FAST channels, we can bring customers back into the ecosystem and further enhance our Pay TV offering.”



Amagi Global Insights: Hours of Viewing, ad impressions & top genres

Key sports takeaways:

Sports is a rapidly growing genre in FAST. But what do the numbers say? Here are some key data and insights from Amagi ANALYTICS based on our database of sports channels using [Amagi THUNDERSTORM](#), our SSAI (Server-Side Ad Insertion) platform.

FAST – Sports Scorecard

Q3 2024 vs. Q3 2023

FAST channels stream a variety of sports, from niche sports like pickleball and poker to major sports like basketball and soccer.



Live sports content on streaming is growing rapidly – we've seen a **65%** growth in the number of live sports hours

Global sports channel viewership grew **~2.5x** on FAST, compared to overall viewership growth of **1.4x**

U.S. and Canada saw triple digit growth in sports channel viewership and impressions, contributing to **60%** of global sports viewership

In EMEA, sports channel viewership grew **~4.5x**, with 60% of the growth driven by the addition of new channels

Among all channels still active from last year, sports is the fastest growing genre at a rate of **75%** year-over-year

Amagi Channel Insights:

The following data and insights are sourced from ~2,800+ channels distributed using Amagi THUNDERSTORM, our SSAI platform.

Global HOV and ad impressions continue to show a robust double-digit YoY growth of **38%** and **41%** respectively.

New channels launched after September, 2023 accounted for **~30%** of total HOV and ad impressions in the quarter.

Entertainment thrives as a popular genre, contributing to **65%** of HOV and ad impressions from new channels.

FAST Channels Global Growth Insights: Q3 2024 (Jul - Sep) vs. Q3 2023 (Jul - Sep)

U.S. & Canada

24% HOV

38% Ad impressions

LATAM

27% HOV

52% Ad impressions

Total

38% HOV

41% Ad impressions

EMEA

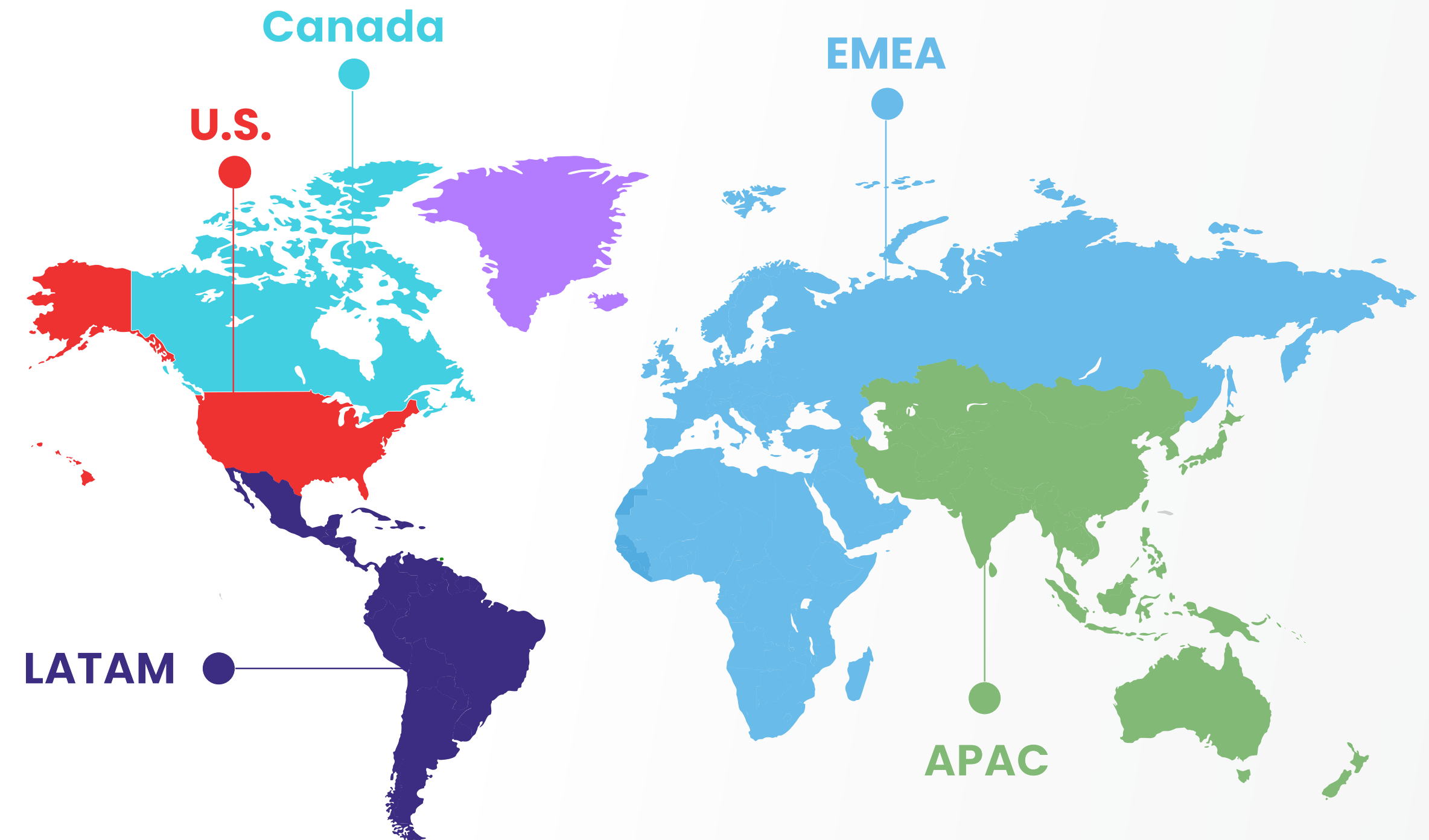
78% HOV

43% Ad impressions

APAC

118% HOV

105% Ad impressions

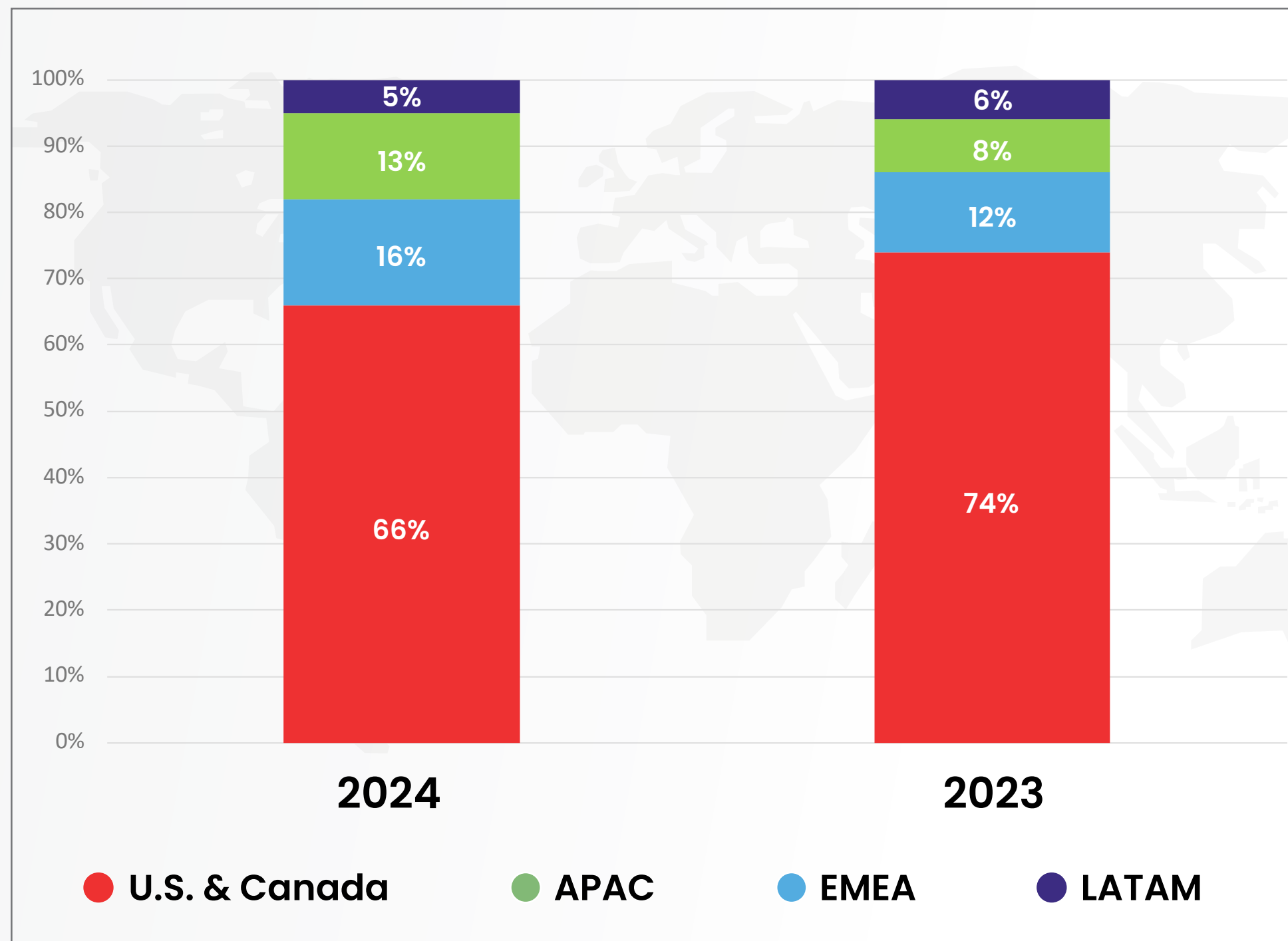


n = ~2800 channels distributed using Amagi THUNDERSTORM | Source: Amagi Global FAST Report Edition 13 | October 2024

Comparison across regions: HOV and Ad Impressions

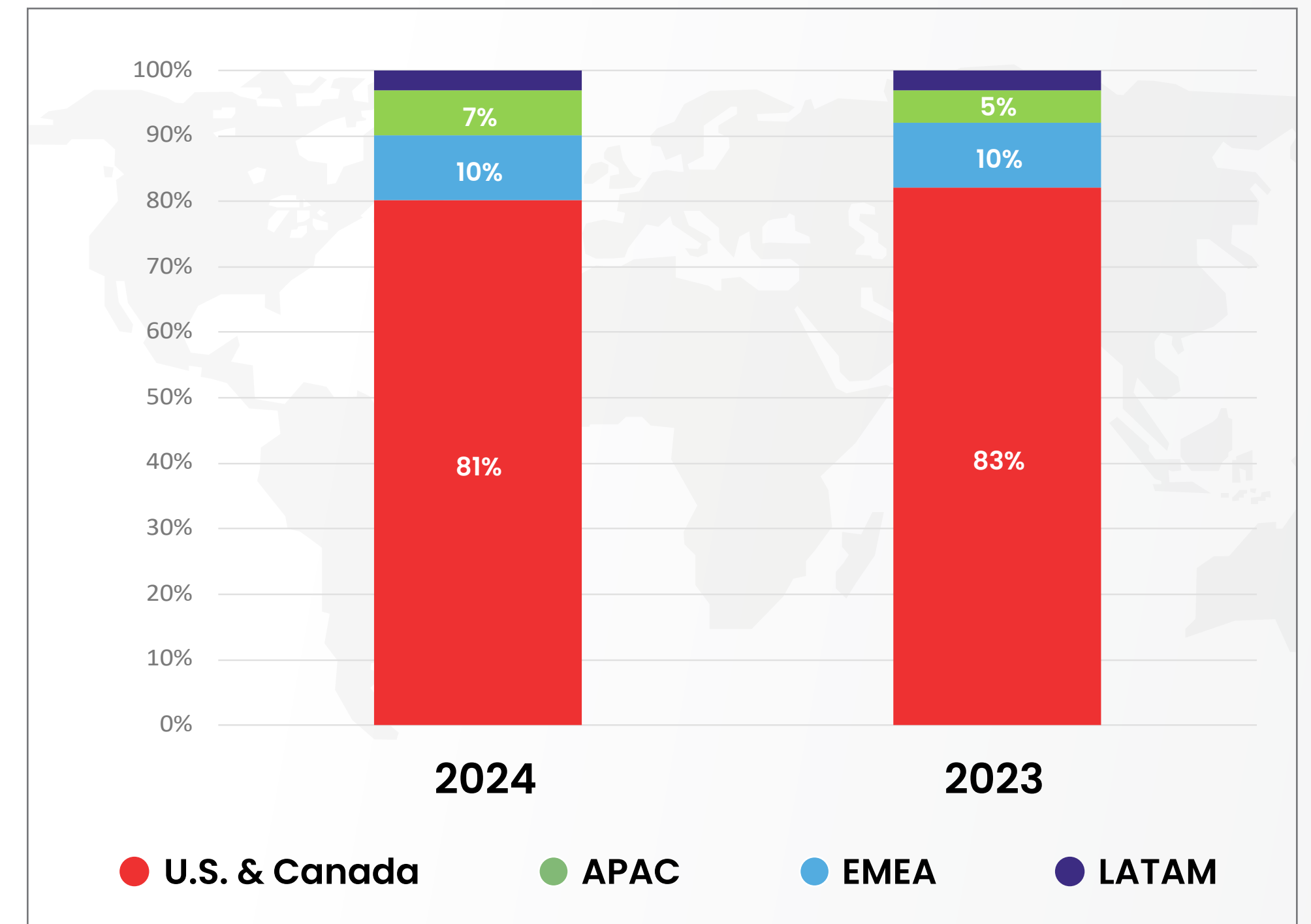
U.S. & Canada continue to lead the global FAST phenomenon in terms of HOV and ad impressions. But there's continued growth across regions, indicating that FAST is no longer just a U.S.-centric model.

Global HOV Contribution: Q3 2024 vs. Q3 2023



n = ~2800 channels distributed using Amagi THUNDERSTORM | Source: Amagi Global FAST Report Edition 13 | October 2024

Global Ad Impressions Contribution: Q3 2024 vs. Q3 2023



n = ~2800 channels distributed using Amagi THUNDERSTORM | Source: Amagi Global FAST Report Edition 13 | October 2024

Tracking regional genre trends

Global overview

News and entertainment continue to be the most popular genres, but their contribution to HOV has declined from 74% to 65% this quarter, while documentaries, lifestyle and sports have gained contribution share.

Within entertainment, reality, drama and comedy were the top contributors globally.

Single-IP channels contributed 42% to the entertainment HOV (19% to overall HOV).

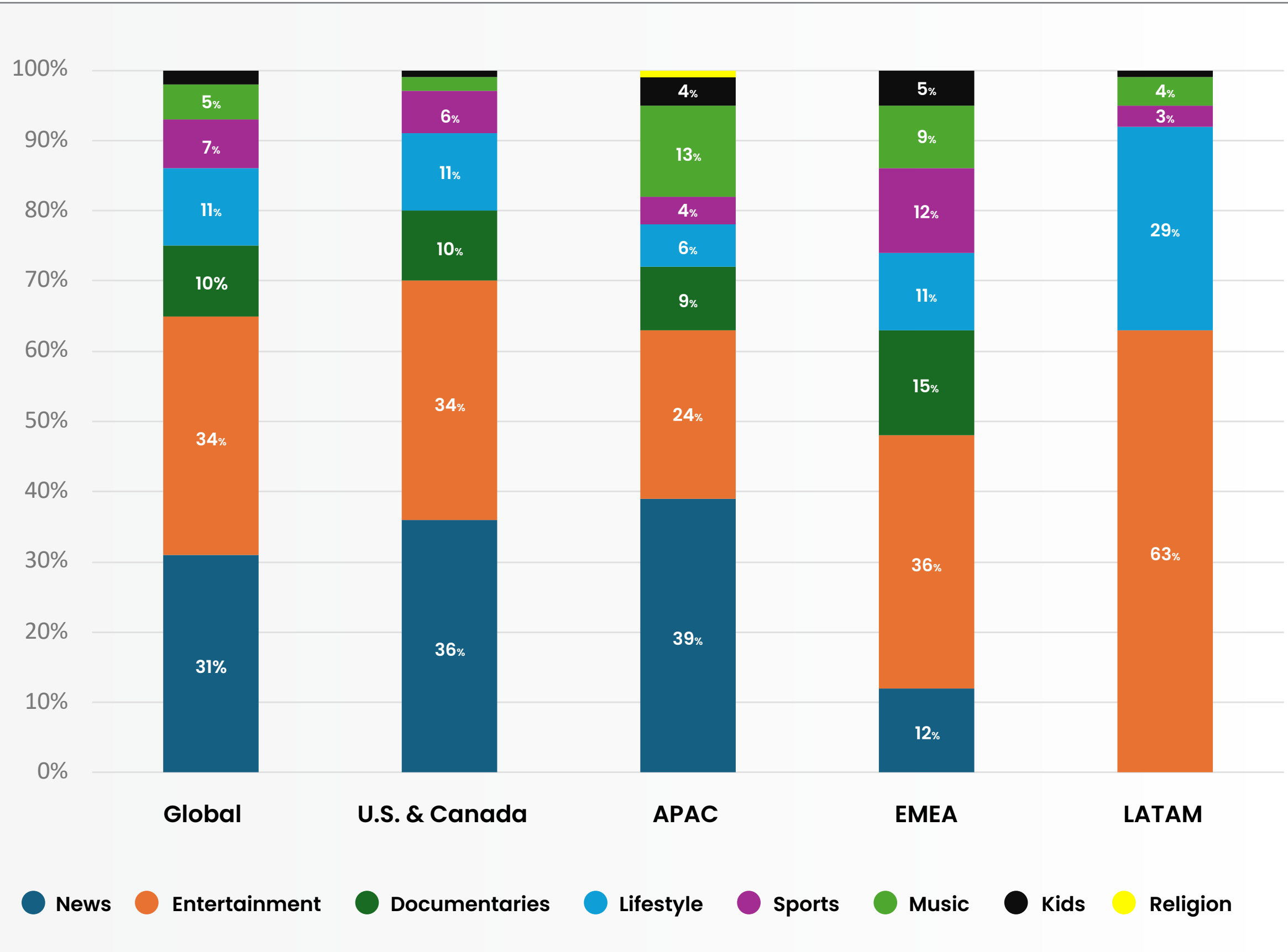
Channel monetization (impressions per HOV) in the U.S. & Canada continues to lead globally, remaining at 2x of other geos.

Within the lifestyle genre, food/cooking channels continue to remain popular, driving 25-75% of viewership in all global markets.

What are viewers watching?

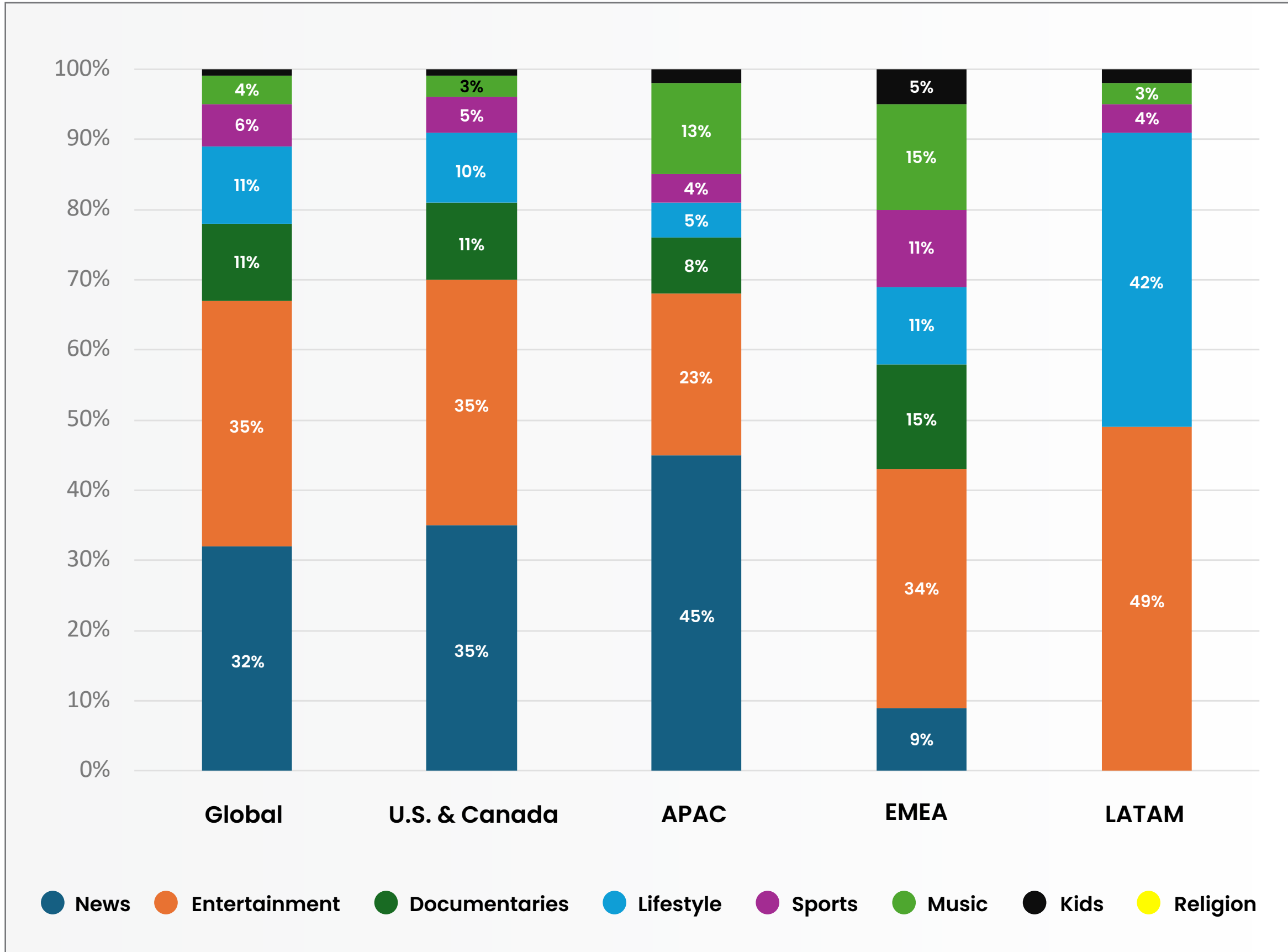
Top genres Q3 2024 – Globally

Top performing genres by HOV



n = ~2800 channels distributed using Amagi THUNDERSTORM | Source: Amagi Global FAST Report Edition 13 | October 2024

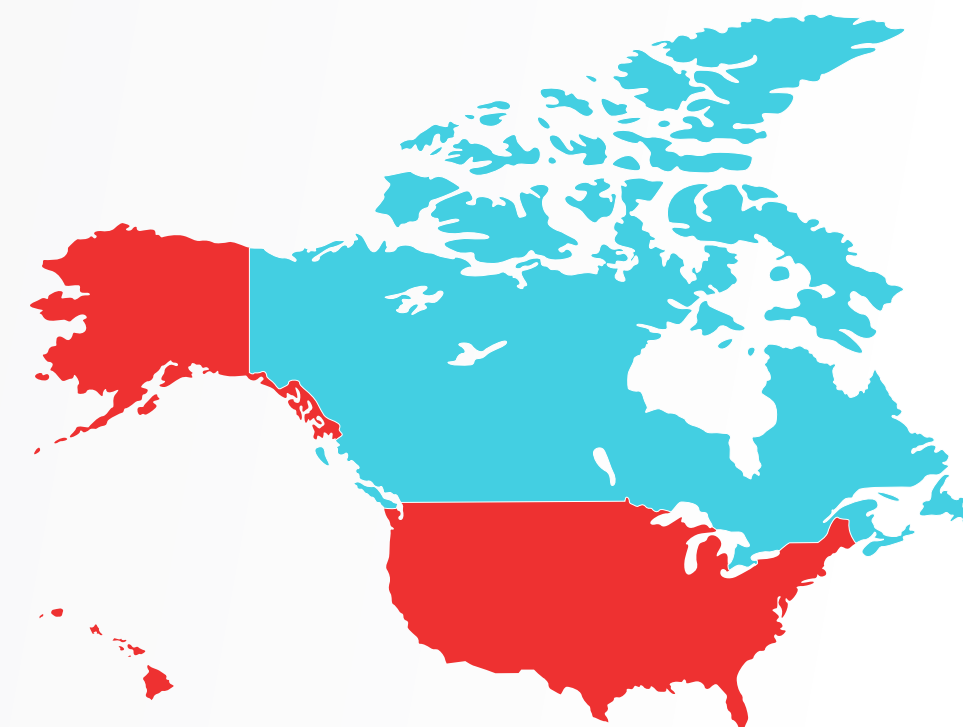
Top performing genres by Ad Impressions



n = ~2800 channels distributed using Amagi THUNDERSTORM | Source: Amagi Global FAST Report Edition 13 | October 2024

U.S. & Canada:

- **16%** of news HOV came from local news channels.
- Reality, drama and comedy channels contributed the most (**36%**) to the overall entertainment HOV.
- Music and documentaries are the best monetized genres (impressions per hour of viewing), with entertainment and news coming in a close second.
- Nature and wildlife channels accounted for **61%** of documentary HOV.
- In lifestyle, viewers watched home & gardening (home improvement) channels the most (**38%**) followed by food/cooking channels (**22%**).
- **~700** new channels were launched in the U.S. & Canada, of which entertainment accounted for **~300** channels, followed by news (**~110**) and documentaries (**~75**).



EMEA:

- Entertainment (**36%** of viewership) and documentaries (**15%** of viewership) continue to be the top genres. These are among the best monetized (impressions per hour of viewership) as well.
- Music channels have the most monetization, while news channels have the least.
- Talk show, reality and comedy channels account for **32%** of entertainment viewership.
- Nature and wildlife channels are the most popular among documentaries with **62%** of viewership.
- **~450** new channels were launched in EMEA, of which most were from entertainment (**~180**), followed by documentary and lifestyle channels.



APAC:

- News remained the most popular genre in APAC with **~40%** share, with India dominating viewership.
- Entertainment is the second-largest segment with reality, comedy, horror and crime accounting for **30%** of viewership.
- Monetization of kids channels remains the lowest.
- **~50%** of channels were launched after Sept., 2023, contributing to **37%** of the viewership.



LATAM:

- Entertainment remains the most popular genre with movies accounting for **60%** share of entertainment viewership.
- Lifestyle is the second-most popular genre and the best-monetized one.
- Unlike other geos, News is not a popular genre in LATAM yet



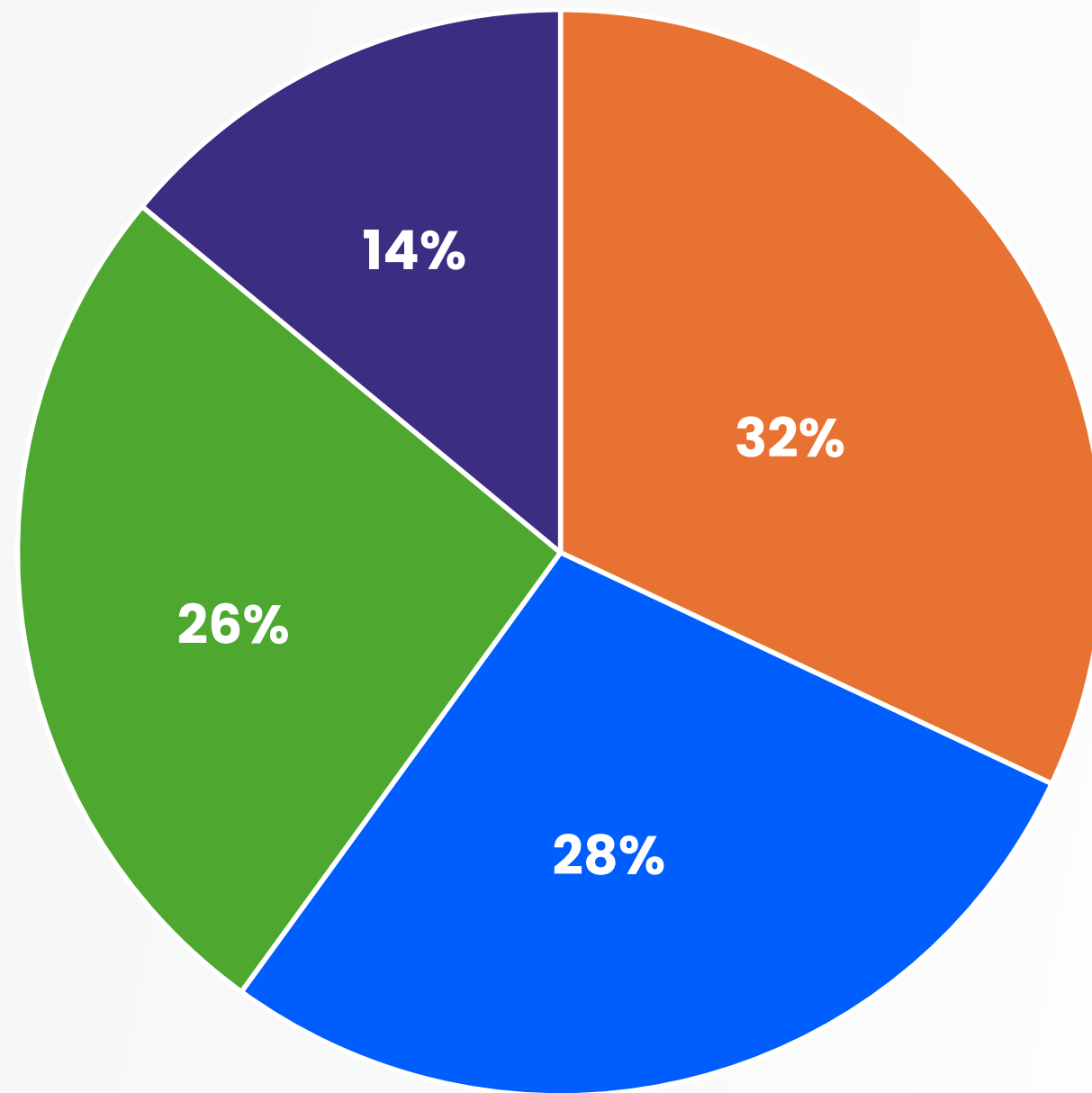
Survey: What execs say about the state of live sports programming in FAST

In a recently collected global survey with streaming media analyst Dan Rayburn, we set out to get more clarity on business preferences, future predictions and more about the state of sports on streaming and TV. What we see is growth in live sports with more room for expansion, advertising, and live production tools.

Responses come from over 128 executives, including broadcasters, content owners, and sports leagues.



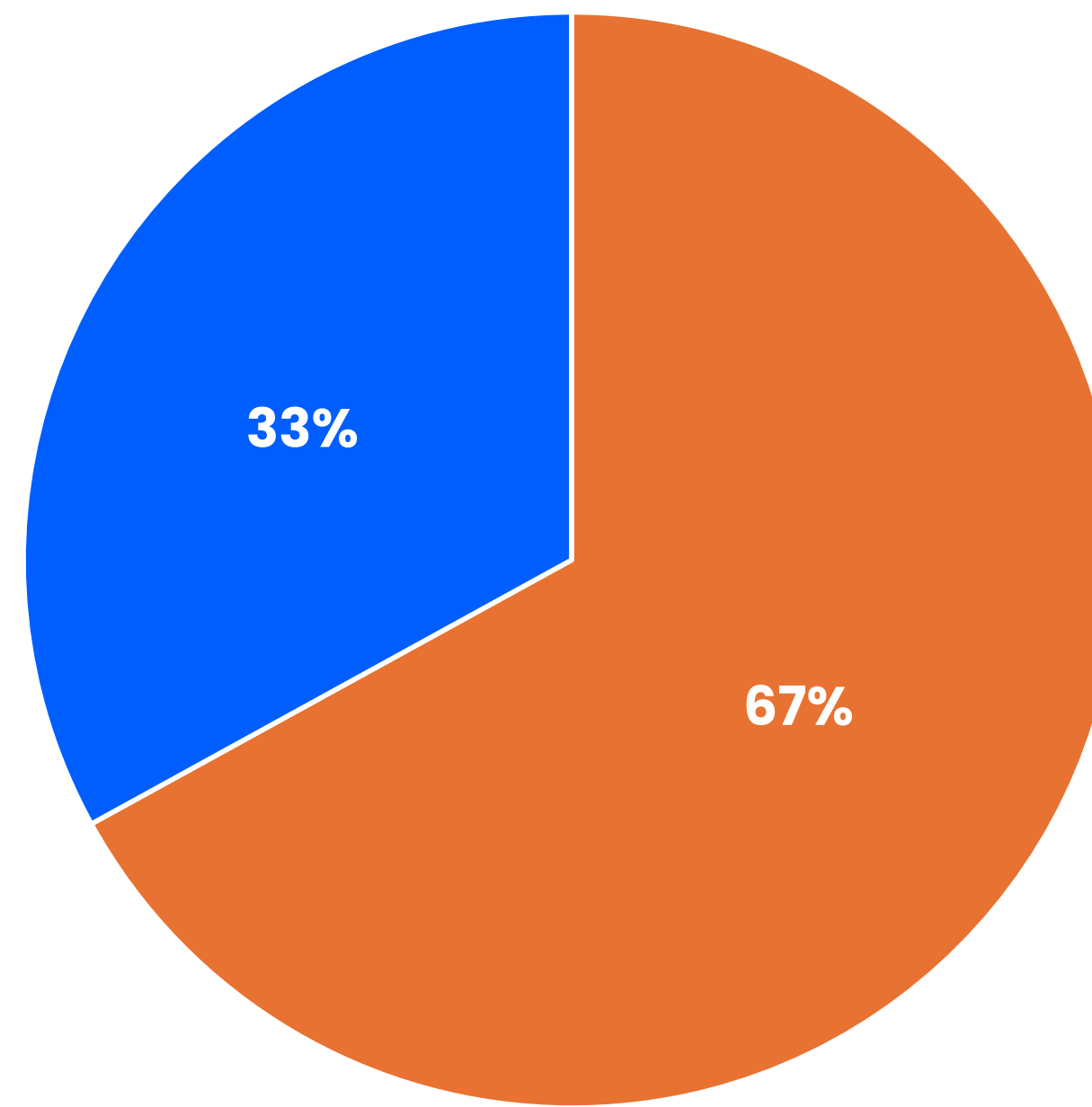
Is live sports programming part of your content plan now or in the future?



- Yes, we're
- No, but we want to add it
- No, and we're not looking to add it
- Yes, and we're looking to add more of it

n = 128 executives, including broadcasters, content owners, and sports leagues
 Source: Amagi Global FAST Report Edition 13 | October 2024

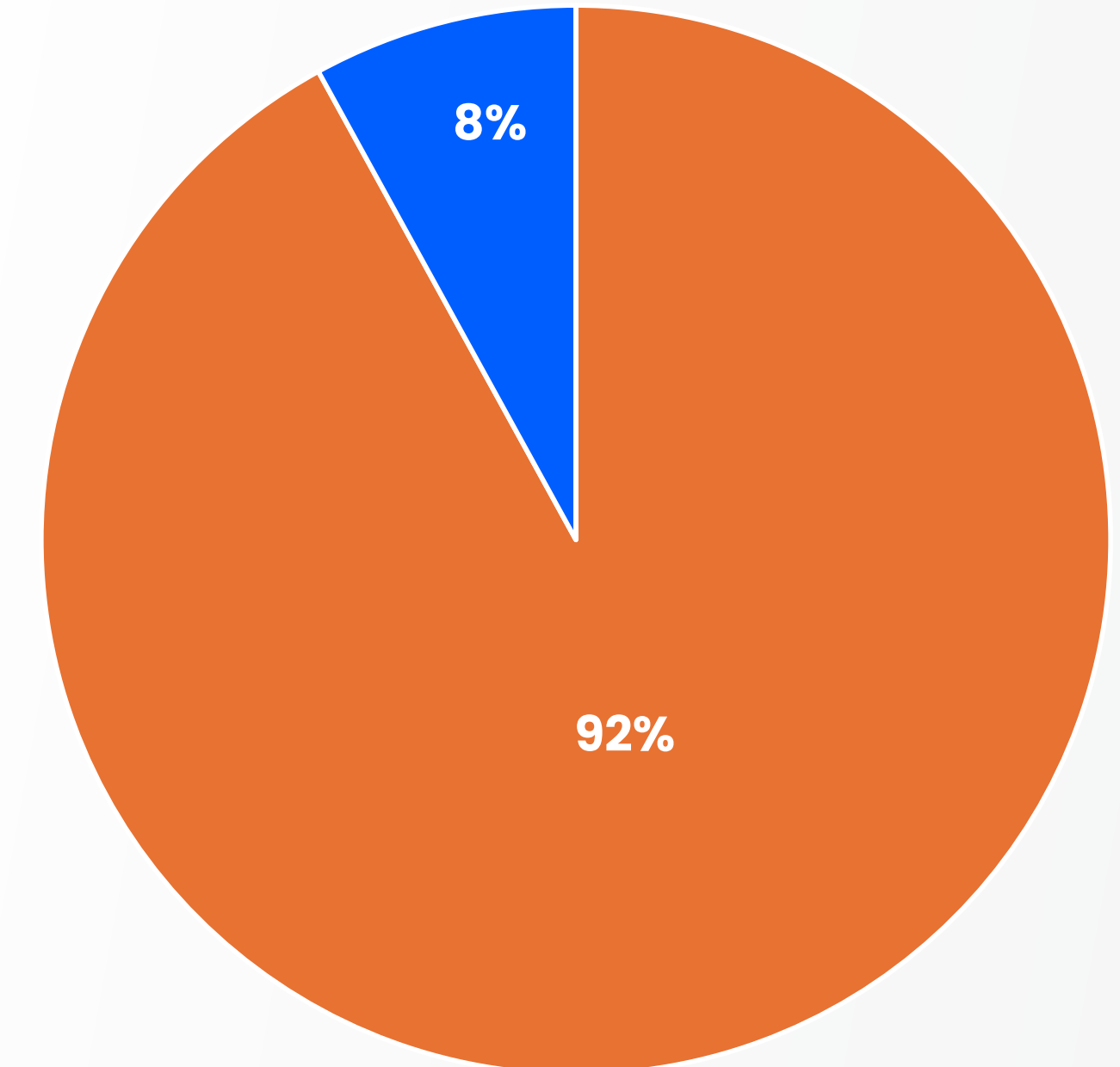
Are you seeing an increase in advertiser interest in placing ads in live sports programming?



- Yes
- No

n = 128 executives, including broadcasters, content owners, and sports leagues
 Source: Amagi Global FAST Report Edition 13 | October 2024

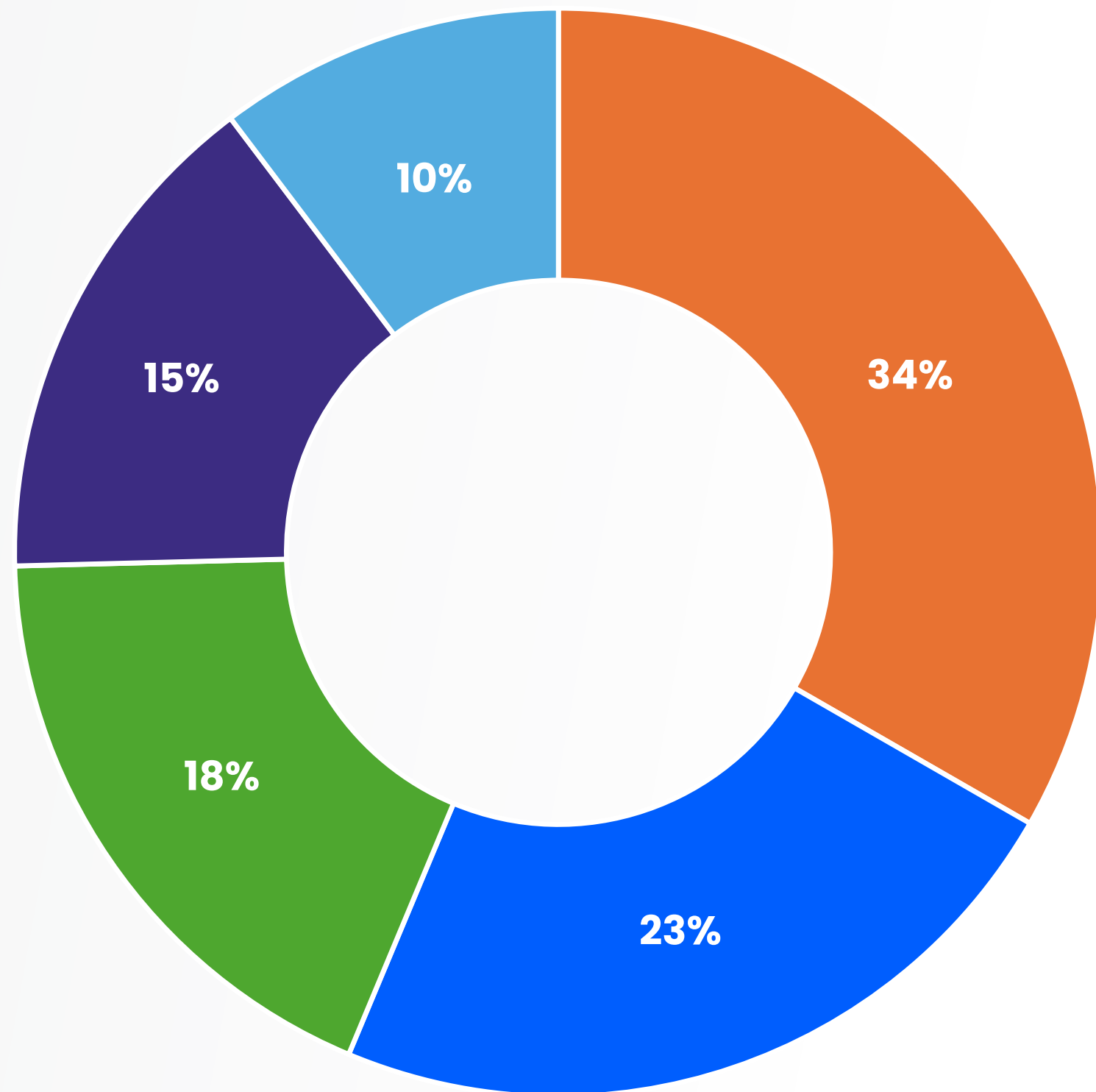
If you currently have live sports programming: What percentage of your FAST programming content is live sports?



- Less than half
- About half

n = 128 executives, including broadcasters, content owners, and sports leagues
 Source: Amagi Global FAST Report Edition 13 | October 2024

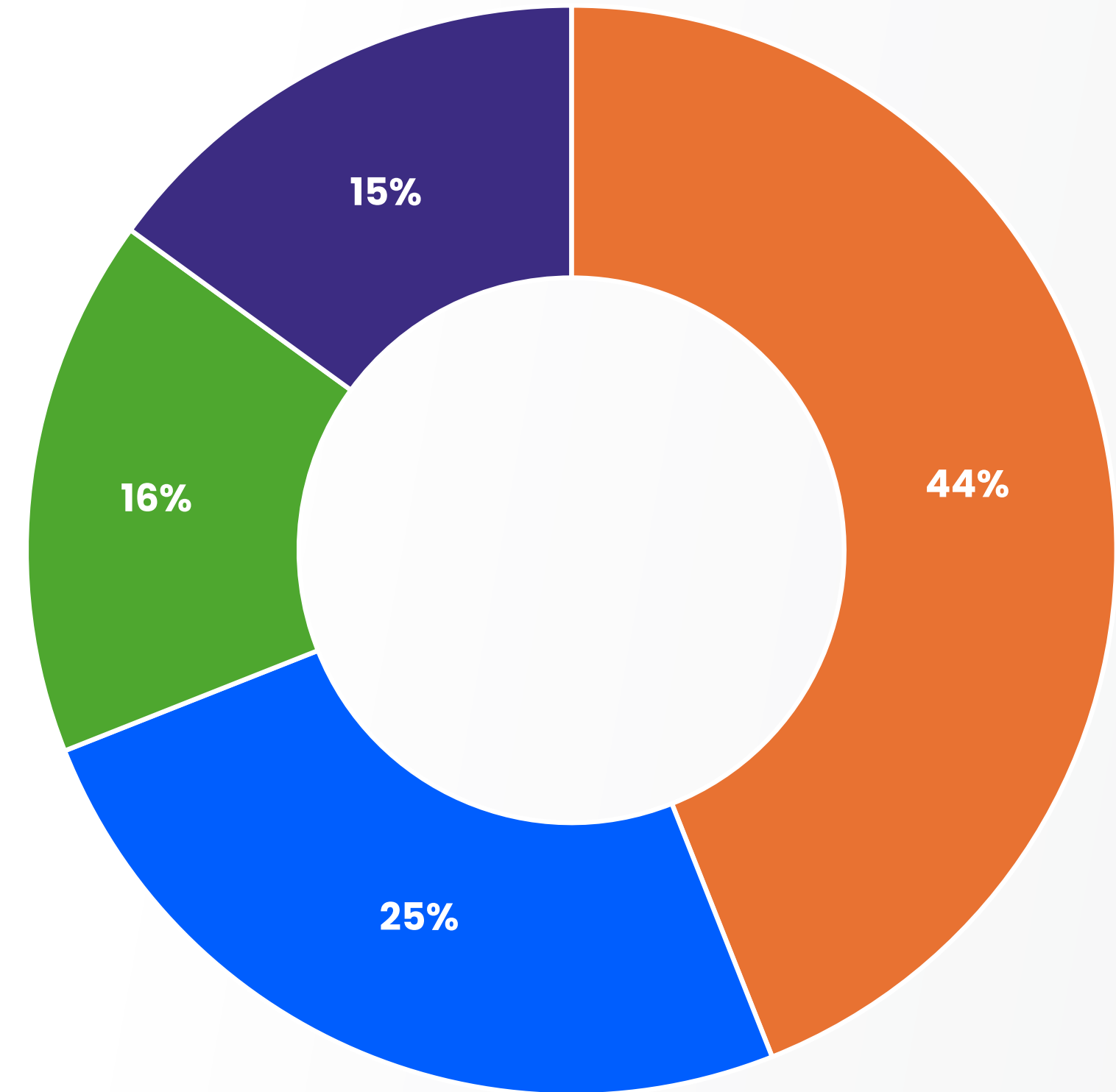
What do you think are the biggest growth areas for live sports programming within the FAST ecosystem moving forward?



- Drive ad revenue
- Larger audience reach
- Act as a "front porch" to paid services
- Opportunities for niche sports distribution
- Build increased demand

n = 128 executives, including broadcasters, content owners, and sports leagues
 Source: Amagi Global FAST Report Edition 13 | October 2024

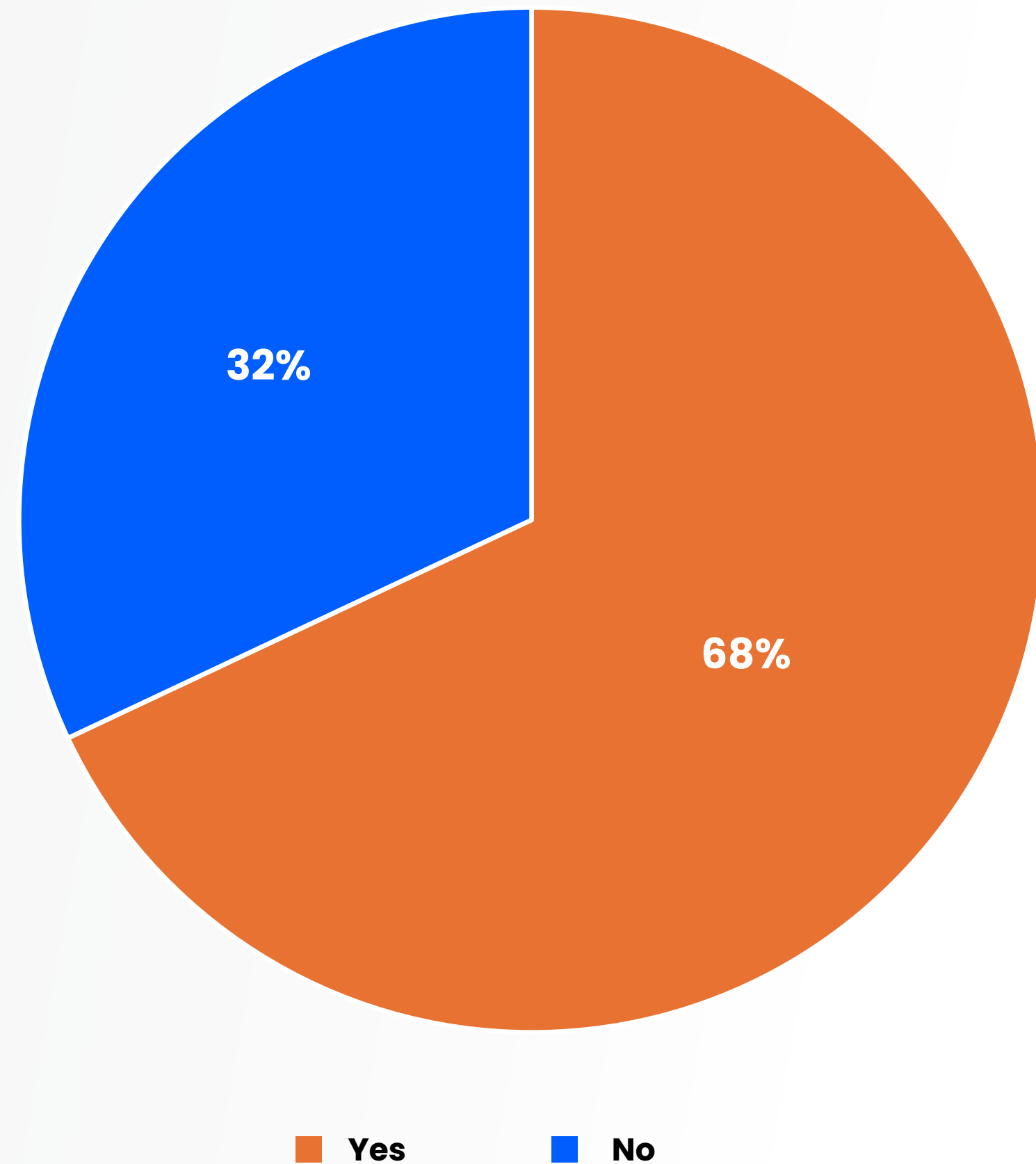
What are the biggest growth restraints for live sports programming within the FAST ecosystem moving forward?



- Content is tied up with larger companies
- Not enough sports content
- Limited ad opportunities
- Companies don't share ad revenue and have to pay upfront licensing fees

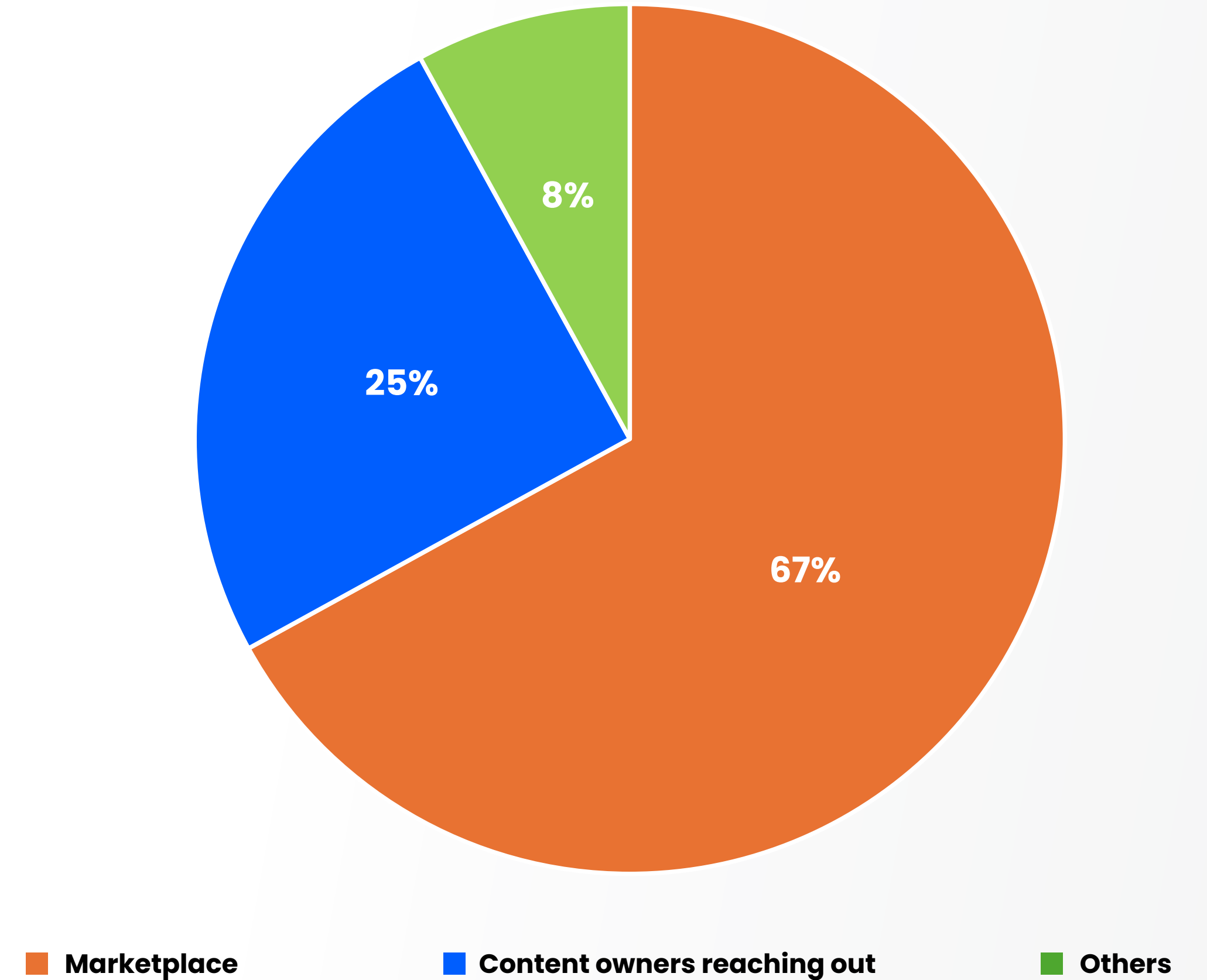
n = 128 executives, including broadcasters, content owners, and sports leagues
 Source: Amagi Global FAST Report Edition 13 | October 2024

Beyond mainstream sports, do you believe niche sports programming will provide opportunistic value to you in the form of a FAST channel or pop-up event?



n = 128 executives, including broadcasters, content owners, and sports leagues
Source: Amagi Global FAST Report Edition 13 | October 2024

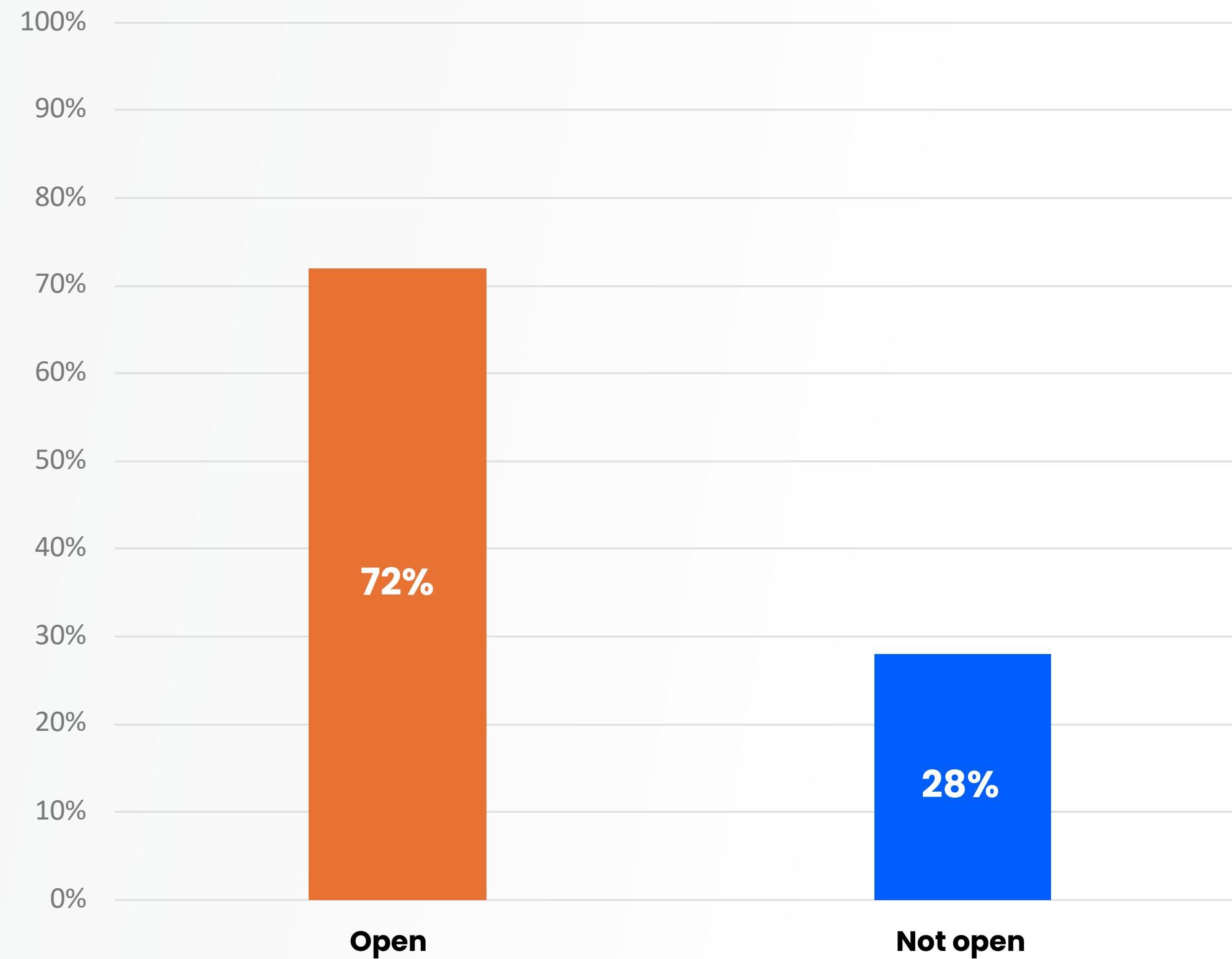
How do you typically source your niche sports programming?



n = 128 executives, including broadcasters, content owners, and sports leagues
Source: Amagi Global FAST Report Edition 13 | October 2024

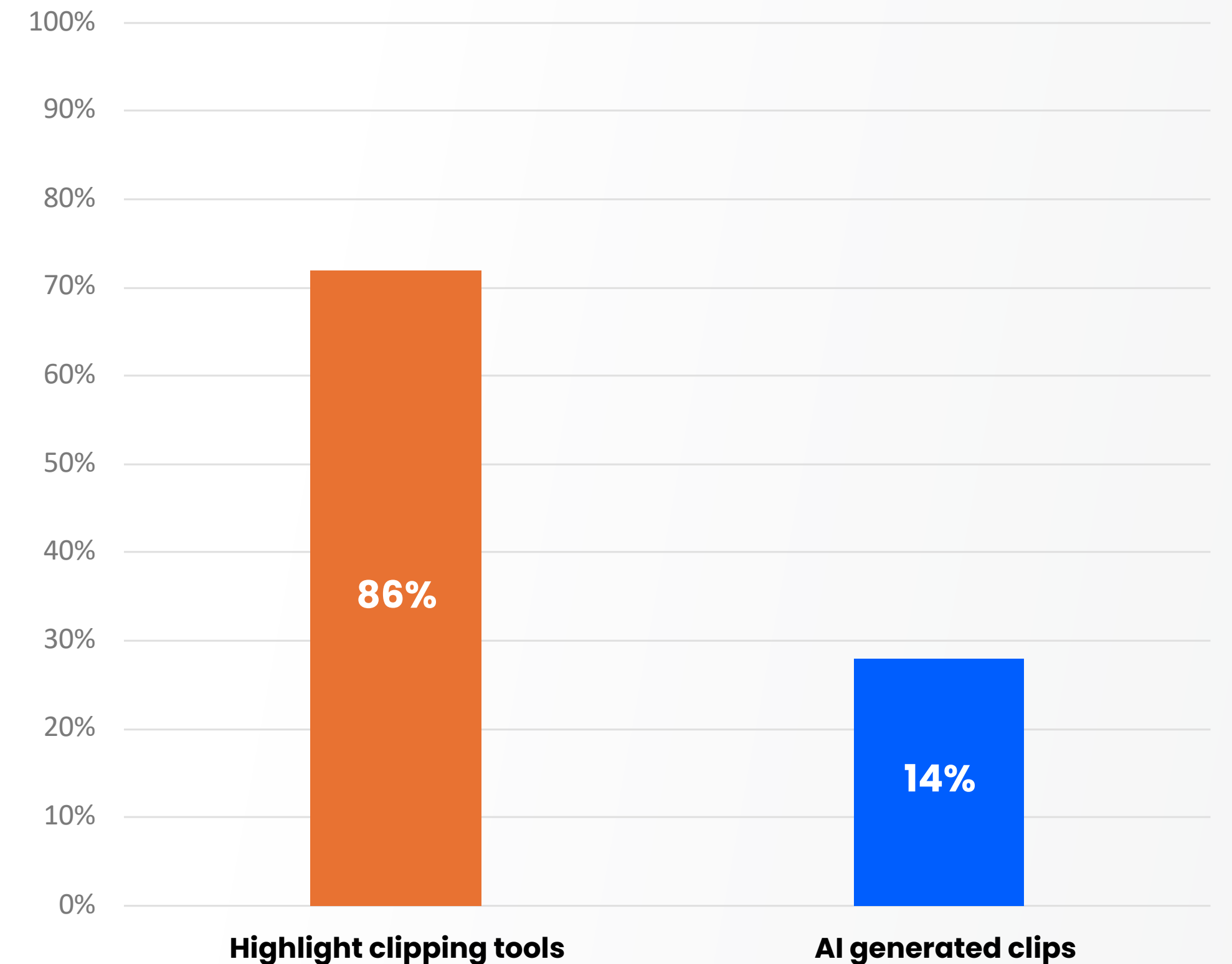
DISCOVER: Learn more about Amagi's global FAST marketplace for streamlined content distribution and acquisition – [Amagi CONNECT](#).

How open are you in looking at new, innovative ad units (e.g. pop-ups, L bands)?



n = 128 executives, including broadcasters, content owners, and sports leagues
Source: Amagi Global FAST Report Edition 13 | October 2024

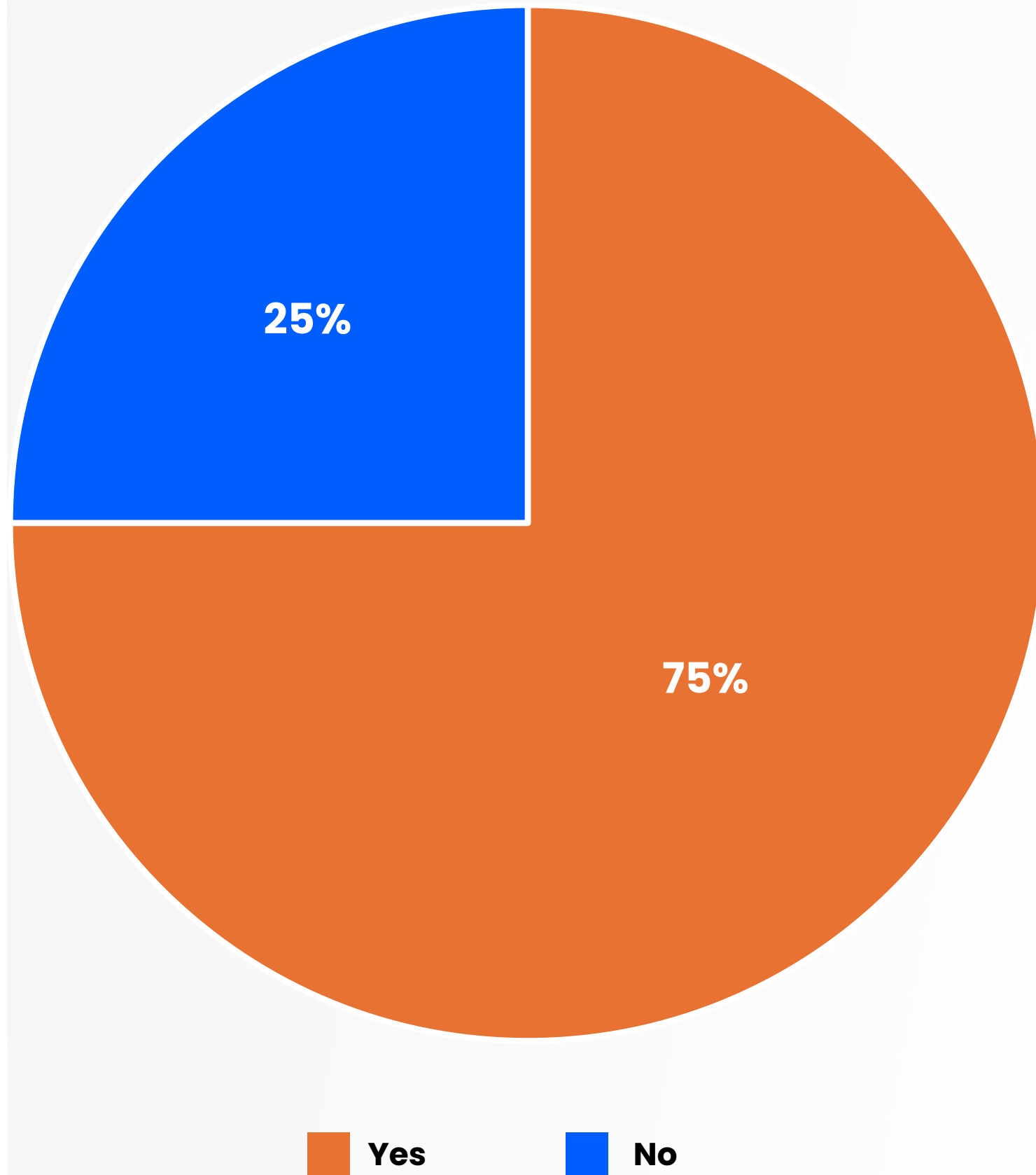
What kind of advanced tools are you using in live production?



n = 128 executives, including broadcasters, content owners, and sports leagues
Source: Amagi Global FAST Report Edition 13 | October 2024

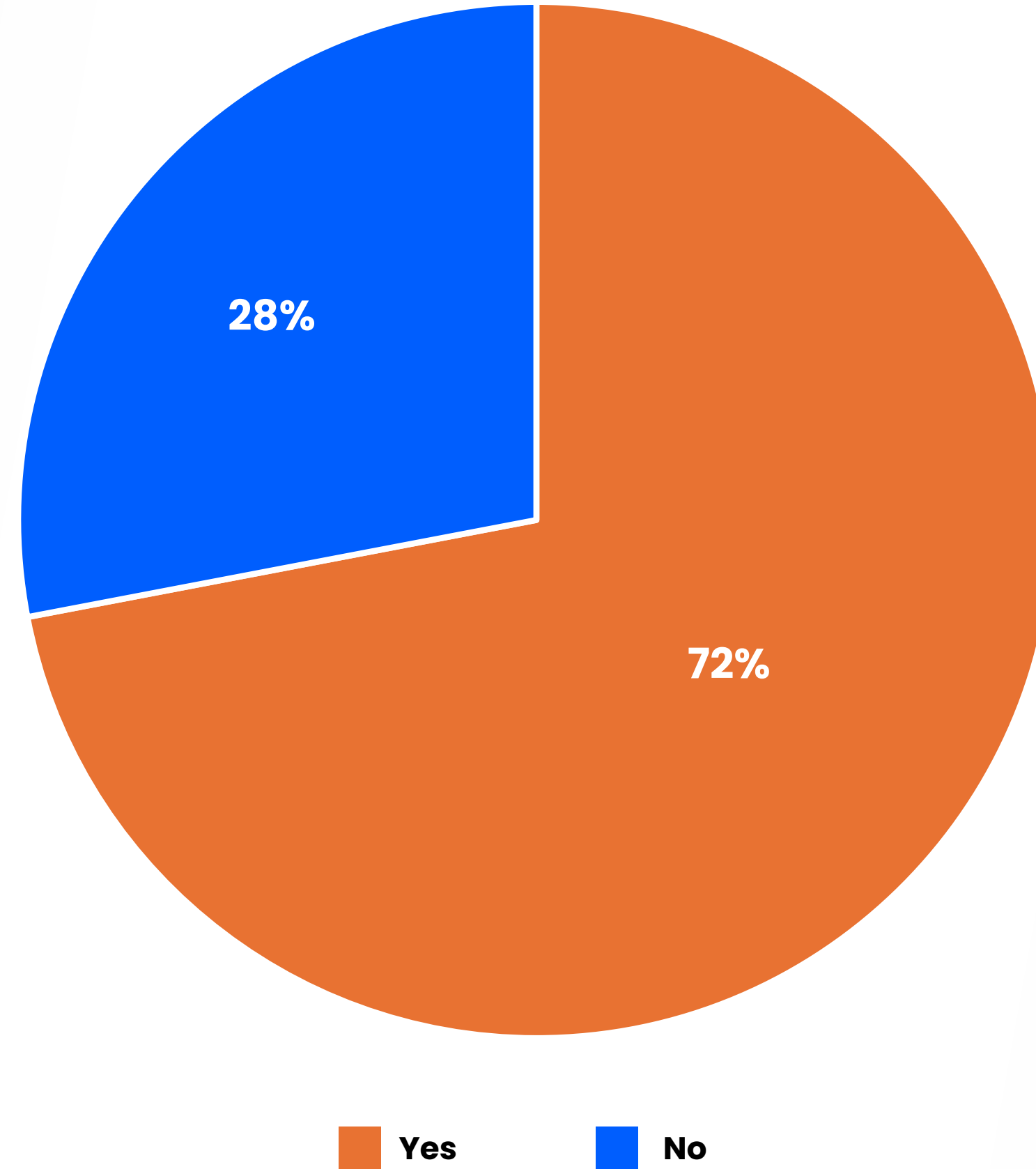
Learn more: Explore our all-in-one live video production platform – [Tellyo STUDIO](#).

If you are a video sports provider (VSP), do you intend to acquire more live sports programming channels in the near future?



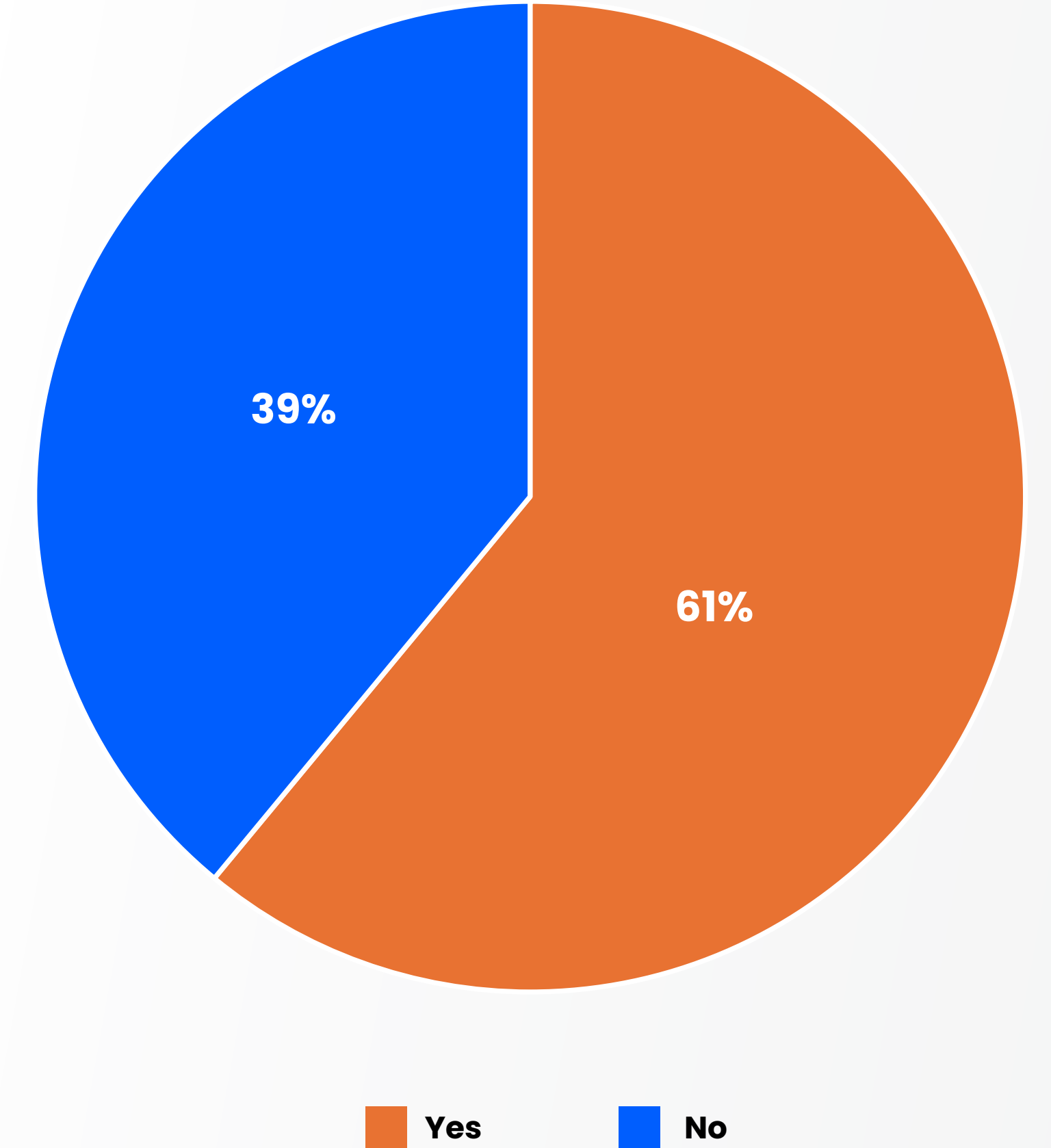
n = 128 executives, including broadcasters, content owners, and sports leagues
Source: Amagi Global FAST Report Edition 13 | October 2024

If you are a VSP, do you plan to bring in more niche sports channels (table tennis, cricket etc.) to your audiences?



n = 128 executives, including broadcasters, content owners, and sports leagues
Source: Amagi Global FAST Report Edition 13 | October 2024

If you are a VSP, are you open to featuring pop up live sports programming (e.g. chess championship for 3 hours) as part of your programming?



n = 128 executives, including broadcasters, content owners, and sports leagues
Source: Amagi Global FAST Report Edition 13 | October 2024

Glossary of terms

- » **Platform** - Device or App through which viewers can access content
- » **Channel** - An individual stream delivered to a platform (not necessarily unique across platforms)
- » **Ad impressions** - Number of views of a particular advertisement
- » **Hours of Viewing (HOV)** - Number of hours a channel was seen/played by viewers
- » **Ad impressions per hour** - A derivative metric calculated by dividing ad impressions by HOV, which indicates the monetization efficiency of a channel
- » **Genre** - Classified into 8 major categories based on the below sub-genres.
 - » **Entertainment** - Movies, TV shows, crime, drama, comedy, horror, etc.
 - » **News** - National news, local news, opinion, weather
 - » **Lifestyle** - Food, cooking, travel, culture, pets, health, etc.
 - » **Documentaries** - Nature, Science, Art, History, etc.
 - » **Kids** - Cartoons, anime, etc.
 - » **Sports** - Ball-based, adventure, track events, E-sports, etc.
 - » **Music** - Music videos
 - » **Religion** - Religious services
- » **Regions** - Divided the world into four major regions
 - » **U.S. & Canada**
 - » **EMEA** - European region that includes the UK, Germany, Spain, France, Middle East, etc.
 - » **APAC** - Asia and Pacific region including India, Australia, Japan, South Korea, Philippines, etc.
 - » **LATAM** - Spanish and Portuguese-speaking countries such as Mexico, Brazil, etc.

Thrive with us!

Reach out to us at cloudandme@amagi.com to build or bolster your presence across FAST, streaming and broadcasting.

About Amagi

Amagi is a next-generation Emmy® award-winning media technology company that provides cloud broadcast and targeted advertising solutions to broadcast TV and streaming TV platforms. Amagi enables content owners to launch, distribute, and monetize live linear channels on Free Ad-supported Streaming TV and video services platforms. Amagi also offers 24x7 cloud-managed services bringing simplicity, advanced automation, and transparency to the entire broadcast operations. Overall, Amagi supports 800+ content brands, 800+ playout chains, and 5,000+ channel deliveries on its platform in over 150 countries. Amagi has a presence in New York, Los Angeles, Mexico City, London, Paris, Sydney, Seoul, Singapore, and broadcast operations in New Delhi, and innovation centers in Bangalore, Zagreb, and Lodz.

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