

The Weekly Listen: Does the NFL have a viewership problem, Disney+ and Hulu combine, and are free returns over?

Audio

On today's episode, we discuss whether the most watched program in the US (the NFL) has a looming viewership problem, Disney+ and Hulu joining forces, whether the free returns party is over, ride-hailing apps giving mixed messages, YouTube viewership on TV screens, the best-selling video games in history, and more. Tune in to the discussion with our forecasting writer Ethan Cramer-Flood and analysts Ross Benes and Paul Verna.

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Episode Transcript:

Marcus Johnson:

Hello everyone, and thanks for hanging out with us for the Behind the Numbers Weekly Listen, an eMarketer podcast made possible by InMobi. This is the Friday show that is happy to have

Ross back. Yes, it is. Ross, who did you miss the most?

Ross Benes:

Oh, since you're asking me, Marcus, I missed you the most.

Marcus Johnson:

Thanks, buddy. Appreciate it.

Ross Benes:

But if Paul asked me, I might've said Paul.

Marcus Johnson:

Okay, moving on. I'm your host, Marcus Johnson. In today's show, does the NFL have a looming viewership problem?

Paul Verna:

Some of the networks that would've carried the programming that no longer do are obviously taking a hit. But as far as the NFL and their licensing revenue and their ad revenue, I'm not crying any tears for them.

Marcus Johnson:

Disney+ and Hulu to join forces.

Ross Benes:

The point is consolidation of audience and ultimately, of ad inventory.

Marcus Johnson:

Is the free returns party over?

Paul Verna:

No big deal. This is something that has been costing someone money the whole time. Now it's going to cost you money. So, think a little bit more carefully about what you buy, you'll be fine.

Marcus Johnson:

Ride-hailing apps give mixed messages, how much YouTube viewership happens on TV screens, and what are the best-selling video games in history?

Join me for this episode. We have three people. Let's meet them. Let's start with that voice you just heard. He's back, ladies and gentlemen, senior analyst who covers digital advertising and media based out of New York, just above the city. It's Ross Benes.

Ross Benes:

Hey, Marcus.

Marcus Johnson:

Hey, fellow. We're also joined by one of our senior forecasting writers, he is based out of New York Proper. It's Ethan Cramer-Flood.

Ethan Cramer-Flood:

Always a pleasure.

Marcus Johnson:

Hey, fellow. Finally, we have our principal analyst who heads up our digital advertising and media practice based out of New York, It's Paul Verna.

Paul Verna:

Thank you, and I'm based out of New York Improper.

Marcus Johnson:

We figured. What do we have in store for you today? Well, Story of the Week, we'll talk about NFL viewership. We then move to the Game of the Week where our contestants will go head-to-head-to-head to give us the best takeaways they can from each of the four stories we have to win a pretend championship belt, and then Dinner Party Data is where we talk about some random trivia we've just recently learned, but we start of course, with the Story of the Week.

Does the NFL, the most watched program in the country, have a looming viewership problem? As Brad Adgate of Forbes reminds us, sports in general, and the NFL in particular dominated TV viewing in 2022. Sports accounted for 94 of the 100 most watched telecasts according to Nielsen.

The NFL alone accounted for a record 82 out of 100 telecasts, up from 75 the year before. Mr. Adgate says the remaining top-rated sporting events for the year were five college football games, three World Cup matches, two college basketball games, one Winter Olympics, which aired after the Super Bowl, and the Kentucky Derby, in a pear tree. See what I did?

Paul Verna:

Very clever.

Marcus Johnson:

All right. Not my best work.

Paul Verna:

Was one of those World Cup games the one that Argentina won in the final?

Marcus Johnson:

Okay, moving on, moving on. We don't have time for that. Yes, Argentina did win. According to Sportico, the most watched scripted entertainment telecast of the year was the premier of Yellowstone's fifth season, averaging 12 million viewers. Maybe some listeners saw that show. The average audience of a regular season NFL game was nearly 17 million, 16.7. So about 36% larger than the audience of that Yellowstone episode.

Paul Verna:

Maybe that was the last hurrah for scripted programming.

Marcus Johnson:

I know, perhaps indeed, the writer's strike going on. 16.7 million NFL audience. Not bad, but down 2% from last year, and down 8% from its peak in 2015. Paul, I'll start with you here. Does the NFL, the most watched program in the US, have a looming viewership problem?

Paul Verna:

I don't think so. I mean, if we're talking about Nielsen ratings, they're pretty much going to be down because that's the way viewership is going. I mean, if you look at our TV viewership, TV time spent, all of that is going down. It's just part of an inevitable shift.

I mean, YouTube is picking up. Sunday Ticket and more of the NFL programming is going directly to digital, like with Thursday Night Football on Amazon. So, I don't think it has a viewership problem. I think it's as you indicated with those stats, I mean, it's by far the most popular programming on TV, and probably on digital to some extent.

So, yeah, I don't think there's a problem. I think obviously networks are in a different business model, so they don't make as much from streaming. So it may be some of the networks that would've carried the programming that no longer do are obviously taking a hit. But as far as the NFL and their licensing revenue and their ad revenue, I'm not crying any tears for them.

Marcus Johnson:

So, it did say most of the ratings drop 2021 to 2022 for the NFL could be attributed to Thursday Night Football moving to Amazon Prime. Amazon's game is the lowest rated Thursday night since 2013. However, Mr. Kit Forbes noting Thursday Night Football was still the most watched program on all of TV for 13 of the 15 Thursdays.

What is concerning though is that the ratings went down 2% year-on-year during an exciting football year. So, it was the most close scoring games ever. Axios saying that during the 2022/2023 season, a record 45% of games were decided by six points or less. So it's not like it wasn't good football, but the ratings still ticked down. Ethan, how concerned are you about this?

Ethan Cramer-Flood:

So I don't think the NFL has a viewership problem at all. In fact, I think there are ways you can cut the numbers that show that they're actually doing better than ever. I think the Super Bowl was the most viewed of all time, and their average viewership for regular games is as strong as ever, and some of the primetime games, the national games on Sunday nights and Monday nights are as strong as ever, some setting all-time records.

So really what it looks like, based on the articles that we assessed and prepared for this conversation is not that the NFL has a viewership problem, it's that internet platforms have an NFL problem, and that Amazon Thursday night games were the only blemish, really. That's because people weren't finding it, weren't moving over to it, weren't making the effort, or maybe just didn't have access to it.

And then the other major issue that we're seeing now is this transition to YouTube, and they spent a metric megaton of money to get the NFL Sunday Ticket and now, they are putting a whole heck of a lot of effort and scrambling to try to make sure that it's worth it, that they're going to actually make money on this deal. It's a really big ticket item.

It's a small part of the overall puzzle, and a million and a half people subscribed to this when it was on DirecTV last year, which is a pretty small number compared to the 20 million that watch any given game. So this is not how most people actually watch football. So they have to figure out how many subscribers they're going to get, whether or not they can leverage this to boost YouTube TV subscriptions, how much advertising they can really sell, and whether or not it's going to be a loss-leader for them.

There's going to be a lot of hand ringing over in YouTube for this particular deal, but for the vast majority of the country that's just watching football, everybody just seems very happy and delighted, and the NFL seems to be about as strong as it's ever been.

Marcus Johnson:

So, Sunday Ticket for folks is a subscription-only package that gives you access to all the Sunday games for out-of-market teams. The NFL's Sunday Ticket signed on a deal with YouTube TV for two billion a year for a bunch of years. Ross, what do you think of the overall viewership and the fact that it ticked down and do you think NFL's Sunday Ticket going to YouTube TV is going to make any impact at all?

Ross Benes:

Well, I do worry if the NFL is spreading itself a little thin. Part of the reason why its viewership is so much higher than any other sports is there are much fewer games. In football, the games matter way more significantly than they do in baseball. You could go drop 12 games in a row in baseball and still make the playoffs just fine.

So the NFL added an extra week last year. It was the first season where there was 18 weeks, 17 games for every team. There was more games on Thursday, even on Saturdays, there was that London Saturday morning game and the playoffs expanded.

Ethan Cramer-Flood:

Ruined my fantasy teams.

Ross Benes:

On top of all that, there's also the USFL and the XFL running games right now, which, way, way, way smaller viewership, but there's almost 50 weeks of the calendar year have football now. So, it could be a little much, it's not quite as unique as it used to be, but they're still doing very well. It's just there's more games than there ever have been. So I think viewership per game will probably drop a little bit as you increase the supply of games.

Marcus Johnson:

One thing YouTube's trying to do to get more people to pay attention to Sunday Ticket, particularly younger people, they said that they're going to have their high profile content creators from YouTube attend games and post videos from the sidelines, locker rooms, and behind the scenes to try and help the NFL reach younger audiences.

YouTube is exploring selling sponsorships tied to that content from creators. Yeah, YouTube hoping to bring in younger audiences. People who watch the NFL games on traditional TV are 55 years old on average, according to the NFL. YouTube's NFL operated channels, viewer's average age is 37. So, nearly a 20-year difference.

Ethan Cramer-Flood:

Yeah, the Gen Z issue could become a problem in the future. If we have this conversation 10 years from now and they've lost a generation of young people because of the lack of interest or inaccessibility, that's going to be a problem. They probably are thinking about that, but they're not on the right track to solving it, because young people overwhelmingly are the ones that don't have access to traditional TV.

So they're not watching or they can't even watch the games the regular way that most people watch it, and it's incredibly expensive now to buy this NFL Sunday Ticket from YouTube, which it's not the kind of price point that you're going to be drawing in teenagers and young folks, who are canceling their cable subscriptions because they don't even want to pay for that.

Marcus Johnson:

Good point.

Ethan Cramer-Flood:

This doesn't seem like it's going to address... I mean, it's true that both the Amazon Thursday night games and these YouTube packages, they're probably going to have a younger audience, but I'm not sure if it's going to solve the long-term problem.

Marcus Johnson:

So DirecTV, NFL Sunday Ticket on DirecTV was 300 for the season, and then you had to pay a base rate as well for monthly DirecTV subscription. But they're asking for 450 a season for NFL Sunday Ticket on YouTube TV. It would be 350 if you're a YouTube TV person. But if you're a YouTube TV person, you're already paying 82 a month for YouTube TV. So it's still close to that 450 anyway.

Paul Verna:

You can always mortgage your house, but those rates are going up as well, so probably not a good idea.

Ross Benes:

I think most kids would rather buy a new PlayStation.

Ethan Cramer-Flood:

Gen Z doesn't have any houses to mortgage.

Marcus Johnson:

I thought a final point here, as an interesting note, Sarah Krouse and Miles Kruppa of the Wall Street Journal noting that YouTube's participation at the upfront's underscoring how it has largely shed its reputation as a provider of prank and cat videos and grown into a global entertainment hub that is gaining ground as customers part ways with traditional cable providers and embrace streaming.

So quite the transformation from YouTube I thought was an important point as well. That's all we've got time for, for the Story of the Week. Time, of course, for the Game of the Week.

Today's game: What's the Point? I read out four stories and Ross, Paul, and Ethan give us their main takeaway. Okay answers get one point, good answers get two, and answers that give you the same feeling as when you execute the perfect high-five, answers that leave you with that feeling, they get you three points. You get 20 seconds to answer before you hear this.

Run long, it's a technical foul, minus two points. Two techs gets you ejected, most points wins, gets the last word. Let's play. We start with Ethan for round one. Disney+ and Hulu to join forces. Disney just announced plans to combine content from its Disney+ and Hulu streaming services in the US writes Annabelle Liang and Gemma Dempsey of the BBC. The new combined app isn't expected until next year. Disney+ and Hulu, and ESPN+ as well, which Disney owns, will also continue to be available as standalone services.

Disney's boss, Bob Iger, said he'd had cordial talks with Comcast, which owns the other 33% of Hulu about taking full control of Hulu when the current ownership agreement expires next year. But Ethan, Disney+ and Hulu to join forces. What's the point?

Ethan Cramer-Flood:

Yeah, I think the point of this is it's just more evidence that people still have not figured out what to do with streaming services, how they should best be managed, how they can best be profitable. You're talking about between these folks at Disney here, folks at Warner Brothers wrestling over the HBO Max decision, you're talking about folks who have spent decades, generations being really successful at figuring out how to feed all of us entertainment products in a sustainable and profit-generating way.

They're still flailing around right now. You seem to be getting a different signal at Disney for instance, and whether they even want Hulu, changes moment to moment now. Looks like they're going to combine the two of them into one app, but it's not going to be handled the way that Max is being handled. They're going to do it something differently. Everyone is still out here trying to figure out a way to make this work.

Marcus Johnson:

Ross?

Ross Benes:

The point is consolidation of audience and ultimately, of ad inventory. If you can concentrate the viewers into one app instead of two, it'd be much easier for advertisers to focus to efforts there. And from the streaming services, they eventually whittled it down from two apps to one. They'd only have to market one app to provide tech support and so on. So, it simplifies things both for advertiser and for viewer.

Marcus Johnson:

Paul?

Paul Verna:

Well, I get Ross's point about the consolidation, but given that they're going to continue to run these apps separately, I mean, they're going to still have standalone apps for Disney+, Hulu, and ESPN+, and that those are all very well established brands. I just don't see the point of uniting two of them under one roof and still continuing to run them separately.

So I think that goes to Ethan's point, that it's a muddled strategy, and I don't think it's going to lead to any... certainly not any increase in subscribers as was hinted, I think in the earnings call. I think people subscribe based on availability of content, not necessarily the user experience, provided the baseline of that user experience is positive, which it is for these services.

Marcus Johnson:

Yeah, it's kind of a form of bundling, if you will. You're going to hear, "Do you want this app plus this app? You get both of them at discounts, like here are both in an app," presumably at a discount, or you can have them both separately. So for the context, this move comes after Disney+ lost four million subscribers in Q1, its second consecutive drop falling to 158 million.

Most of those losses came from Hotstar, a service in India, which lost the streaming rights to Indian cricket matches last year. Disney+ also lost around 300,000 subscribers in the US and Canada after it upped subscription prices. Hulu added 200,000 subscribers in Q1 to reach 48 million. ESPN+ gained 400,000 to hit 25 million. The losses at Disney+ were nearly \$700 million in Q1. That is down though from 1.1 billion in losses the previous quarter.

Round two, we start with Ross. The free returns party is over, suggests Amanda Mull of the Atlantic. She notes that quietly and largely unnoticed by many buyers, the returns landscape is shifting as many retailers have begun to tweak their policies. Kohl's and REI now charge for return shipping. Neiman Marcus will charge you for shipping if they don't get the thing back within 15 days from you.

Even Amazon will charge you a dollar for dropping off packages at a UPS store instead of an owned property like Whole Foods or Amazon Fresh. Ms. Mull points to a 2022 analysis of 200 retailers' return policies by Narvar, who found 41% charged some kind of return shipping fee, up from 33% in 2021. So from 33 to 41. Amit Sharma, Narvar's CEO, says it's probably closer to 44% today. But Ross, the free returns party is over. What's the point?

Ross Benes:

E-commerce companies made it frictionless for you to return things so that you would get more accustomed to buying stuff through their platforms. And now that everyone's pretty accustomed to it, this is something they lose money on and they want to shore that up and discourage some of that behavior, so they don't have to continue to pay for your free returns.

Marcus Johnson:

Paul?

Paul Verna:

Yeah. I mean, I think in the go-go days of e-commerce, a lot of companies went really deep on free shipping, free returns, just a lot of perks that are less sustainable now that there's so much more competition and people are returning to stores. So it's changing the dynamics of retail as well, but I mean, it's just not surprising given how retailers, just like every other company, is squeezed now, so these kinds of perks are going to be the first thing to go.

Marcus Johnson:

Ethan?

Ethan Cramer-Flood:

Yeah, I mean, this is yet another in a long list of cold, hard reality checks that are descending on the digital economy. Wishing we could have this type of conversation for lots of different categories and lots of different platforms, I mean, things that cost money, cost money, and eventually, the party ends and eventually, people are going to have to get used to the world working the way it's always worked in the past.

That's fine. Spend five extra minutes thinking a little bit more carefully about what you're going to buy online. Remember back in the day if you bought something at a store and you didn't like it, you had to return it and you had to go and you couldn't just magically put it out on your porch, you couldn't just magically drop it off at UPS and everything's taken care of and the money gets put back into your bank account. No big deal. This is something that has been costing someone money the whole time. Now it's going to cost you money. So, think a little bit more carefully about what you buy. You'll be fine.

Marcus Johnson:

At the halfway mark, Ethan, just out in front with five, Ross and Paul tied in second place with four a piece. We move to round three. We start with Paul. Ride-hailing apps give mixed messages. On the one hand, Uber just posted a near 30%, 3-0% revenue growth as its ride-hailing business improved and drivers came back, more drivers came back following the pandemic.

Uber's delivery business grew more slowly than ride-hailing, but still managed 8% growth. Lyft, on the other hand, posted weaker than expected revenue growth of 14% and slightly narrowed its losses. Not enough to stop its shares falling though. Paul, ride-hailing apps giving mixed messages, what's the point?

Paul Verna:

This is a segment that's still normalizing or emerging from all of the changes that happened in the pandemic. I think there are a lot of reasons that would probably take too long to go into for why each of these companies has had a different quarter, but it's not necessarily an indication of the market overall to look at one quarter.

I think we'll just have to see how they perform going forward, but I mean in general, it does seem that ride-sharing is pretty healthy, and some of the ancillary services, even though they didn't contribute that much to Uber's performance, they are an added value particularly for that company compared to Lyft.

Marcus Johnson:

Ethan?

Ethan Cramer-Flood:

Yeah, I think the point is that Uber is doing something else right beyond just having a food delivery service. They got all this credit during the pandemic, and immediate post-pandemic for being smart enough to be a food delivery service, and that enabled them to run circles around Lyft and otherwise basically survive and get a lot of credit.

Well, now we're back to normal for the most part, everything else is equal, and they're still doing better than Lyft. Just even on the stuff that is just one-to-one comparison. So they've obviously got some synergies that are working out for them well, and Lyft is probably in trouble.

Marcus Johnson:

Ross?

Ross Benes:

Whatever these companies mention that their losses are narrowing, that just makes me think that their prices are rising, and that my days of getting a very cheap Lyft that was half the price of a yellow cab are long gone.

Marcus Johnson:

Yeah, they're definitely gone.

Ethan Cramer-Flood:

Yeah, that's been long gone.

Marcus Johnson:

So Paul mentions the health of ride-hailing. Our forecasting team estimates the number of ride-sharing users and ride-sharing sales, so users and sales for ride-sharing both reached pre-pandemic levels last year, 2022, and that this year, ride-sharing users will grow 10% as sales grow 24%.

It's already back to pre-pandemic levels, has been. And then the second point here, Uber has nearly twice as many ride-sharing users as Lyft in the US at nearly 60 million. That's good enough for 22% of the population, also according to our wonderful forecasting team.

All right, folks, going into double points, round four, Ethan out in front with seven. Ross and Paul still tied with five. We're still all to play for as you get double points in round four, and we're going to start with Ethan for round four, "Almost half of YouTube viewership happens on TV screens," writes Insider Intelligence Briefings Analyst Daniel Konstantinovic.

Before the pandemic, 30% of YouTube viewership happened on the TV. Today it is 45%, so from 30 to 45 according to the company. But Ethan, almost half of YouTube viewership happening on TV screens. What's the point?

Ethan Cramer-Flood:

Oh, this is an easy one for me. The point of this is that I work with some really smart people, because the forecasting team has been calling this out for a couple of years now. They've been anticipating this pivot point, this transition. We even wrote about it a year ago. It would point YouTube viewership on CTV had exceeded any other way.

It wasn't over 50%, but there was a time already happened when the minutes on CTV exceeded minutes on mobile, or your smartphone or your tablet or your computer and your desktop, and we were way out in front of this and we've been saying, "Hey, this is a big change that's coming." And now that change is starting to catch up on the world of advertising and revenues and just general awareness, so that's the point to me.

Marcus Johnson:

Yeah, quickly, Daniel did note, yeah, the shift happening before the pandemic in March 2020. YouTube viewership on TV screens was up 80% year-on-year and ad spend was similarly rising as well. So yeah, this wave has been coming, and as you mentioned, our forecasting team has been paying close attention to this trend. Ross?

Ross Benes:

Also the type of stat that YouTube can mention at the upfronts and tout as why they are TV-like, and not just any old digital video company anymore, it was just a few years ago where they were over half of viewing on mobile, but that shifted to TV screens in a big way, and it's only going to continue to grow now that they have things like the NFL Sunday package that we talked about earlier.

Marcus Johnson:

Paul?

Paul Verna:

This has been a long transition for YouTube, something they've been trying to do for many, many years, and I think it's really starting the bare fruit. Though to Ethan's point, this is not new news, but it's certainly an inflection point, I would say.

You mentioned the upfronts, and at the Vevo upfronts, they cited how Vevo is now viewed about 50% also on CTV. Now, I don't know what that previous number was, but probably quite a bit more mobile-focused as well. So, it's the way of the world. YouTube has been a big

presence in the upfronts and will be even more so I'm guessing this year, and it really has reached its goal of being the new TV.

Marcus Johnson:

Yeah, speaking of the upfronts, YouTube TV ranked second with 48% behind Hulu with 74%, in an iSpot survey asking advertisers which platforms they plan to allocate spending to during the upfront season. So YouTube TV just in second place behind Hulu. Daniel had a chart, and was asked about pointing that out. The majority of this growth coming from regular YouTube, not YouTube TV, this switch over to YouTube viewership happening on the TV, it's coming from regular YouTube, not the TV version.

And then finally, YouTube this year becoming the most watched streaming service in the US, overtaking Netflix. In March, 7.8% of American TV time was spent watching YouTube, according to Nielsen, ahead of Netflix's 7.3. So just in front, but still in front.

That's what we've got time for, for the Game of the Week. Count the score, Ethan is this week's winner of the Game of the Week. 11 points. Ross and Paul came storming back, but not enough. Joint second for both of them with nine a piece. Ethan gets the championship belt, that's made up. And the last word?

Ethan Cramer-Flood:

Oh, yeah. I always forget that in the event that you win these things, you're expected to have the last word. Well, I got a couple more things on YouTube. This data point, these metrics of the transition to CTV viewership suggests that there's a lot more headroom for growth for advertising revenue for YouTube, because still the vast majority of ads of ad revenue and ads that YouTube currently soaks up are not coming on CTV, if you take a look at YouTube's total revenue, obviously they're a major, major player.

But it's mostly still from our mobile phones and our computers. They have not yet fully leveraged this transition to CTV, although I'm sure they're hard at work figuring out things like the NFL package probably have something to do with that plan, but we'll see.

Marcus Johnson:

That's going to be our first last word that's been work-related. Normally Blake just says something uninteresting about golf.

Ethan Cramer-Flood:

I'm not used to this whole last word thing. I mean, if you let me keep winning more, then I'll see what we can handle.

Marcus Johnson:

We shall see, Ethan. We shall see. Well-played, folks. Congratulations to Ethan, this week's winner of the Game of the Week. Let's move to Dinner Party Data. This is the part of the show where we tell you about the most interesting thing we've learned this week and we start with Ethan, the winner of today's Game of the Week. Ethan, what do you have for us?

Ethan Cramer-Flood:

Cool. So this is related to our opening conversation about the NFL. This is a chart that I actually saw in one of our own reports that just came out about the Eurovision Song Contest, and in this excellent report from one of our other colleagues, Mateo, there is a chart about the most viewed TV events in the world over the last seven years, and it's-

Marcus Johnson:

Seven?

Ethan Cramer-Flood:

... interesting because... Yeah, they started in 2016. They picked 2016, I don't know why, and they're not also not claiming that this is a comprehensive ranking from one to 10 or one to 15. Several Super Bowls are on this list, but they are way down the list. I don't think anyone would be surprised to learn that the Olympics gets a much bigger audience all over the world than the Super Bowl does. We all know that. We would probably also not be surprised to hear that the World Cup Finals get much significantly larger viewership than the Super Bowl.

But it's the scale of the difference that's shocking to me. So the Rio 2016 Olympics got 3.2 billion viewers. The Tokyo 2020 Olympics got over three billion viewers. The World Cup Finals get a billion to a billion and a half, on average. The Super Bowl is down there at just over 100 million. So you're talking about-

Marcus Johnson:

Wow.

Ethan Cramer-Flood:

... the Olympics gets 30 times the viewership than the Super Bowl, which is the number one ranked show that the US has to offer. Now, we know that people around the world are not so much into football. Eurovision easily outpaces the Super Bowl in terms of viewership, and then just for fun, the third most watched event in the world over the last seven years after those, Olympics are out front, the third most watched event was the wedding of Prince Harry and Meghan Markle in 2018 with 1.9 billion viewers.

Marcus Johnson:

Wow.

Ethan Cramer-Flood:

So there's the Super Bowl way down at the bottom, not even really cracking the top 10, and staggeringly far behind.

Marcus Johnson:

We've got to stop calling baseball the World Series. We have to.

Ethan Cramer-Flood:

Oh, yeah, that doesn't even make the top 100 in the US.

Marcus Johnson:

No one else is paying attention but America. I love you, but no one else is really paying attention. There's a really interesting stat about viewership of events and the wedding between Charles and Diana, gosh, I don't even know when, like-

Paul Verna:

1981.

Marcus Johnson:

Wow, bang! In '81.

Paul Verna:

Bang.

Marcus Johnson:

We'll play call. Back to at-hand-

Paul Verna:

Is that right?

Marcus Johnson:

What do you mean, is that right? You said it so confidently.

Paul Verna:

I really have no idea.

Marcus Johnson:

Edit that out. We can't have Paul going back on it. But whenever it was, there were 750 million people who tuned in. Now, that doesn't seem as high as some of the billions that you mentioned in terms of the World Cup or in terms of the Olympics, but at the time, there were only three billion people on the planet. So basically that means that 25% of people on the planet Earth watched a wedding, which I think is just remarkable. Very nice.

Paul Verna:

It was 1981, by the way.

Marcus Johnson:

It was?

Paul Verna:

Yeah.

Ethan Cramer-Flood:

You said it with confidence.

Ross Benes:

I would've believed it, even if it wasn't.

Marcus Johnson:

I know. Ross, what you got for us, mate?

Ross Benes:

So when I was last on this show, I had zero children. Now I have one children, and that's a year-over-year increase of infinity percent.

Marcus Johnson:

Is this your stat?

Ross Benes:

That's my stat.

Ethan Cramer-Flood:

That's a [inaudible 00:30:34].

Paul Verna:

That's the best stat ever. Best one ever.

Ross Benes:

I'd make a chart for it, but I can't represent infinity.

Ethan Cramer-Flood:

We can fact check that, and we can confirm.

Marcus Johnson:

Ross, what's been the hardest bit about being a new parent so far? Is there a thing you have to do for the baby where you're like, "Oh, this again?"

Ross Benes:

Well, just when there's a long day and you haven't had much sleep and they want to be fussy, that's probably the hardest. But so far, it hasn't been too terrible.

Marcus Johnson:

I'm still like that with my parents. Okay. What's been the best moment?

Ross Benes:

I don't know what the best number one-

Marcus Johnson:

After the kid was born. Has there been a moment where they laughed at a joke, or?

Ross Benes:

Well, I took her on a ferry ride to Fire Island, and she was really good, and it was really fun bouncing around and playing with her on the boat and then again on the beach. That was just a really fun day that I had with her.

Marcus Johnson:

Nice. I'm like, "What's the best moment?" Ross is like, "When she didn't scream in public." Very nice there, very nice. Let's go to Paul.

Paul Verna:

So this is for all you Wordle freaks out there like me, I started wondering how many five-letter words are available to the Wordle creators and try to calculate how long of a runway they have before they start repeating themselves. It turned out to be a complex problem because the free dictionary lists more than 158,000 words with five letters.

That's pretty much any word with five letters, and as we know, many five-letter words in English are really four-letter words in disguise. But that would mean it would take 432 years to get to repetition, and 432 years happens to be exactly my age. So, I can relate to that. But if you look at the Scrabble dictionary, which actually also has a lot of obscure words that probably wouldn't fly in Wordle, but let's just go with that. So that's 9,000 five-letter words, which is about 24 years. So all that means is that in the year 2047, some Wordle completist is going to say, "Hey, you already did that one!"

Marcus Johnson:

I still haven't played. Ethan, Ross, you guys?

Ethan Cramer-Flood:

I'm an avid Wordler. I'm basically a daily Wordler.

Ross Benes:

I haven't played.

Ethan Cramer-Flood:

This is actually fascinating, Paul. I never really thought about whether or not anything was ever repeating, but I'm sure that there are obsessives out there that would have shouted from the rooftop if they repeated a word. I'm surprised there's 9,000 available though, because they really do pick very common words. They avoid anything unusual. There might not even really be 9,000.

Paul Verna:

I doubt it because that Scrabble dictionary does have a lot of words that nobody ever heard. They just happen to be five letters that string together a word, so I would imagine that Wordle has to be a lot more selective than that. So maybe cut that in half, which would be about 12 years.

Ethan Cramer-Flood:

10 years, 10 or 12 years.

Paul Verna:

Yeah, which is not that much in the grand scheme of things, when you think about how obsessive people are.

Marcus Johnson:

Very nice. All right, folks, I've got one for you real quick. What are the best-selling video games in history by units sold? So, Sam Parker at Visual Capitalist wrote a piece about this. Any guesses?

Paul Verna:

I'm not a gamer.

Ross Benes:

This has probably been blown out of the water by now, but the original Mario for NES was up top for a long time because the Mario/Duck combination came with the console when you would buy it. So they sold like 30 million copies or something like that just by selling Nintendos, before people would go and buy it a la carte. So that'd be a guess, but there's probably something newer that I'm unaware of.

Ethan Cramer-Flood:

Are we talking about franchises or are we talking about individual, one game?

Marcus Johnson:

Individual, one game. Ross, are you talking about Super Mario Brothers in '85? Is that what you're talking about?

Ross Benes:

Yeah, the first one, and they had a combination where it could also come with Duck Hunt, but it can also be sold separately.

Marcus Johnson:

Super Mario Brothers in '85 is seventh.

Ross Benes:

Ah, wow.

Paul Verna:

This movie now could spark sales, I guess maybe? I don't know.

Marcus Johnson:

Yeah, give it a boost. Number one is, well, actually, let me go. You know what? I'll go reverse. Oh, build some suspense, will I? So rounding out, so from six to 10, Mario Kart 8. My God, there are eight? I don't think we need eight. Super Mario Brothers, the '85 version. Red Dead Redemption II, Pokemon Red, Green, Blue, or Yellow, came out in '96 and Terraria? Never heard of, that's 10. So that's six through 10.

Paul Verna:

Wow.

Marcus Johnson:

Three through five. No, let me do it the other way around. What the hell am I doing? In fifth place-

Paul Verna:

You're presenting these in the most confusing possible way.

Marcus Johnson:

Yeah, I know. I don't know what I'm doing. My goodness.

Ethan Cramer-Flood:

We're going backwards, counting down in the wrong direction.

Marcus Johnson:

Six through ten, then we'll go seven through three, and then two through nine.

Ethan Cramer-Flood:

But it's all very intuitive.

Paul Verna:

We're really going behind the numbers here, under the numbers.

Marcus Johnson:

My friend calls this show we're Beside the Numbers. Okay. PUBG: Battlegrounds. It's a battle royale shooter, that's in fifth, Wii Sport is in fourth, Tetris, hello-

Paul Verna:

Hey, there you go.

Marcus Johnson:

... is in third.

Ross Benes:

That guy didn't get much money because he got screwed, the guy who made Tetris.

Marcus Johnson:

Oh, the inventor of Tetris, yes.

Ross Benes:

The inventor of Tetris made no money despite making one of the most popular entertainment products of all time.

Paul Verna:

They got a movie about that now, right? Or is that out?

Ross Benes:

I think so.

Marcus Johnson:

Really?

Paul Verna:

Yeah, yeah.

Ross Benes:

I saw it in a documentary, but I'm sure there's probably a movie about it. It's a well-known story.

Marcus Johnson:

Very nice. I've got to look that one up, for sure. Way behind first place in second is Grand Theft Auto V, came out in 2013. So that has 175 million units, that's in second place. Number one, the independently developed Minecraft.

Paul Verna:

Ah, there you go.

Marcus Johnson:

With its pixelated blocks, takes the top spot, 2011. So, that has 238 million units. Grand Theft Auto V in second place has 175. So, way behind. Nintendo has 11 of the top 20 best-selling games. Rockstar in second place has just two, basically all the good ones are Nintendo, pretty much. But yeah, Minecraft up top. Should it be?

Paul Verna:

This is global? This is global, not US?

Marcus Johnson:

Yep. Yep.

Paul Verna:

That makes sense.

Marcus Johnson:

How is Halo not the best-selling game ever? Let's get real.

Ross Benes:

Well, the first Halo was on the original Xbox, which had a limited reach compared to-

Marcus Johnson:

Yes, true.

Ross Benes:

... like, the PlayStations at the time.

Marcus Johnson:

Very true. The best game though is Mario Kart. Come on.

Paul Verna:

Yeah.

Marcus Johnson:

Agreed?

Paul Verna:

I'm on board with that.

Marcus Johnson:

Before you can disagree, let's end the show.

Paul Verna:

That's because I'm bad at everything, every other game, and I win at Mario Kart, so that's fine.

Marcus Johnson:

Well, do you know what? Duck Hunt could be up there too, good shout, Ross. That's what we've got time for for today's episode. Thank you so much to my guests. Thank you to Victoria. No, Victoria was not on the show. Thank you to-

Paul Verna:

She is the show.

Marcus Johnson:

But she should've been.

Victoria:

I'm in the background.

Marcus Johnson:

V!

Victoria:

Don't offend me like that, come on. You're going to make me cry!

Marcus Johnson:

You are a guest. You're always a guest. So, V, I was going to ask you when I got to thanking you, but I'm thanking you already. So, what's your favorite game?

Victoria:

Oh, I'm not a video game kid. I was a go outside and play outside kid. Sorry.

Marcus Johnson:

Oh, Victoria! Outside? Yuck. Thank you to Victoria. Let's thank Victoria first, the Victoria who edits the show. Thanks, Victoria.

Victoria:

Oh my God, thanks, guys. Thanks for being such good guests on the show today. Makes my job very easy.

Marcus Johnson:

They're okay. Thank you, of course, to Paul.

Paul Verna:

Always a pleasure.

Marcus Johnson:

Thank you to Ross.

Ross Benes:

Thanks, Marcus.

Marcus Johnson:

Thank you to Ethan.

Ethan Cramer-Flood:

As long as I keep winning, I'll keep coming back.

Marcus Johnson:

This week's winner of the Game of the Week. Welcome back, Ross, of course. Thank you to James who copy edits the show, Stuart who runs the team, and thanks to everyone for listening in. You can head to [behindthenumbers_podcast](#) for our brand new... It's not brand new. We've been doing it for a while. It's a behind the scenes segment called The James Question. It's on Instagram. We'll see you guys hopefully on Monday for the Behind the

Numbers Daily, that's an eMarketer podcast made possible by InMobi. Happy weekends. Are you neighbors?

Ross Benes:

Same county, but I think it'd be about a 25-minute drive, 20-minute drive.

Marcus Johnson:

Okay, local.

Paul Verna:

Maybe it will be, Ross, maybe we should hang out now that you're back.

Marcus Johnson:

I'm free. I'm free.

Ross Benes:

We can meet in White Plains or something.

Marcus Johnson:

That's perfect for me. That works for me.

Paul Verna:

Because you don't get enough of me in the day-to-day world, Ross, I figure let's do more of it on evenings and weekends.