



Live Video Streaming – A Global Perspective

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Sample & Methodology

Method:

- 29 question survey was designed and fielded in 21 markets
- All respondents were asked the same core questions
- Localization for HH income, along with brand/channel specific localizations on question codes

Sample Profile:

- Total Sample N=4200, N=200 per market
 - 18 years or older
 - Own/have access to one of the following devices: Feature phone, PC/laptop, smartphone, tablet, gaming console, Smart TV, or video streaming devices
 - Who watch video digitally on a PC/laptop, smartphone, tablet, or connected TV
 - And who have ever watched live video streaming on any device or platform

Markets Included:

- APAC (N=400): Australia, China
- EUROPE & AFRICA (N=2000): Germany, Hungary, Ireland, Italy, Russia, South Africa, Sweden, Switzerland, Turkey, United Kingdom
- MENA (N=400): Saudi Arabia (KSA), United Arab Emirates (UAE)
- NORTH AMERICA (N=600): Canada, Mexico, United States
- SOUTH AMERICA (N=800): Brazil, Chile, Colombia, Peru

Sampling Plan:

- All sampling was conducted by OnDevice Research, using dynamic sampling methods
- When sampling for the project, we attempted to gain a nationally representative profile for each market that started the survey and let the desired sample target (live content streamers) fall out from this
- The objective of this sampling plan was to enable us to ascertain the incidence/usage rank for 'live video streamers' per market
- Where a nationally representative profile of starts was not obtained, weighting was applied to correct

IAB Objectives

The key objective of this study is to gain a better understanding of consumer experiences with and attitudes towards live video streaming. In particular, we aim to uncover trends in device usage (e.g. mobile, desktop, connected TV), platform preferences (e.g. social, skinny bundle, etc.), content preferences (e.g. sports, news, events, etc.), and consumer perceptions of advertising experiences during live video streaming.

This research provides brand marketers and publishers with a global benchmark and insights into the value of live streaming to engage with audiences around the world.

Background



21 countries participated in the research and 4200 ‘live video streamers’ were recruited, 200 in each country.

When referencing global averages or regional averages throughout this report, the results are derived from the 21 countries that participated in the research.

See Appendix for more details on methodology and sample specification



Key Findings

- **Video content is in demand – and appears set to grow further**
 - 70% stream video content at least once a day. 67% have live streamed video on any platform or device with 47% saying they have increased their live streaming since last year
- **Smartphones facilitate frequency of access – but do not command the most screen time**
 - Smartphones and tablets are used for short (under 30 minute) bursts of live streaming while other devices are used for longer live streaming video sessions
- **Social platforms are the key source of live video content and TV is the most popular type of live video content accessed**
- **Nearly two-thirds of viewers plan to live stream the 2018 World Cup globally while roughly half plan to watch video recording of it online or on TV**
- **Consumers in most countries prefer free, ad-supported live video streaming over subscription services**
 - 52% of consumers globally prefer free, ad-supported live streaming
- **Consumers interact with advertising and it can build brand presence**
 - Nearly two-thirds of respondents globally have engaged with an ad seen while live streaming video
 - Brand recall, clickthrough, and site visitation are the primary actions provoked
- **Live streaming is a daily activity that provokes social interaction**

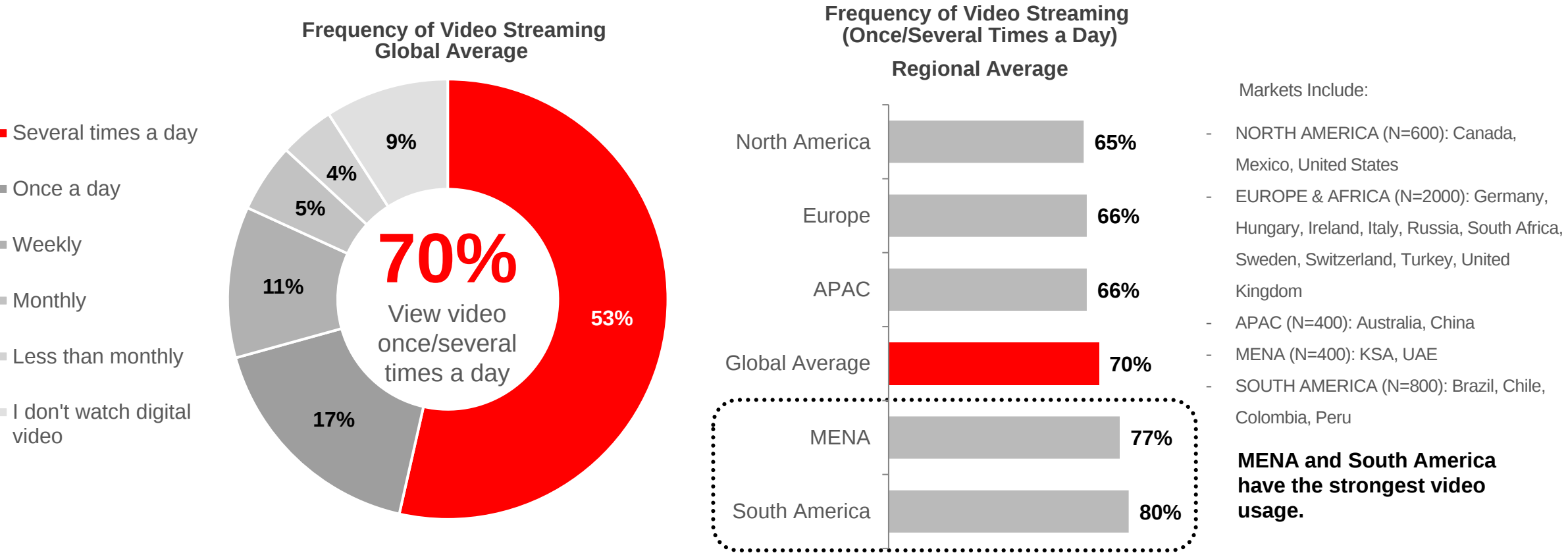
Market Opportunity: How Popular is Live Video Streaming

A majority of consumers stream live video and adoption continues to increase quickly

- **70% are consuming digital video content via a 'connected device' (PC/laptop, smartphone, tablet or connected TV) several times a day/once a day**
 - This reflects a clear desire for live video content around the globe. In MENA and South America, consumption is even higher, at 77% and 80% respectively
- **Live video content appeals to consumers – 67% have streamed such content on any platform or device**
 - Once again the thirst for video content is seen more strongly in MENA, where 90% have live streamed
- **Accessing live video content looks set to grow further and is changing consumer behavior**
 - 47% state they stream more live video content now than they did a year ago
 - Consumption of more traditional media channels has been affected: 44% now watch less live TV as a result of live streaming

70% of consumers globally watch digital video content at least once a day

Q6. How often do you watch video digitally on your PC/laptop, smartphone, tablet, or connected TV?

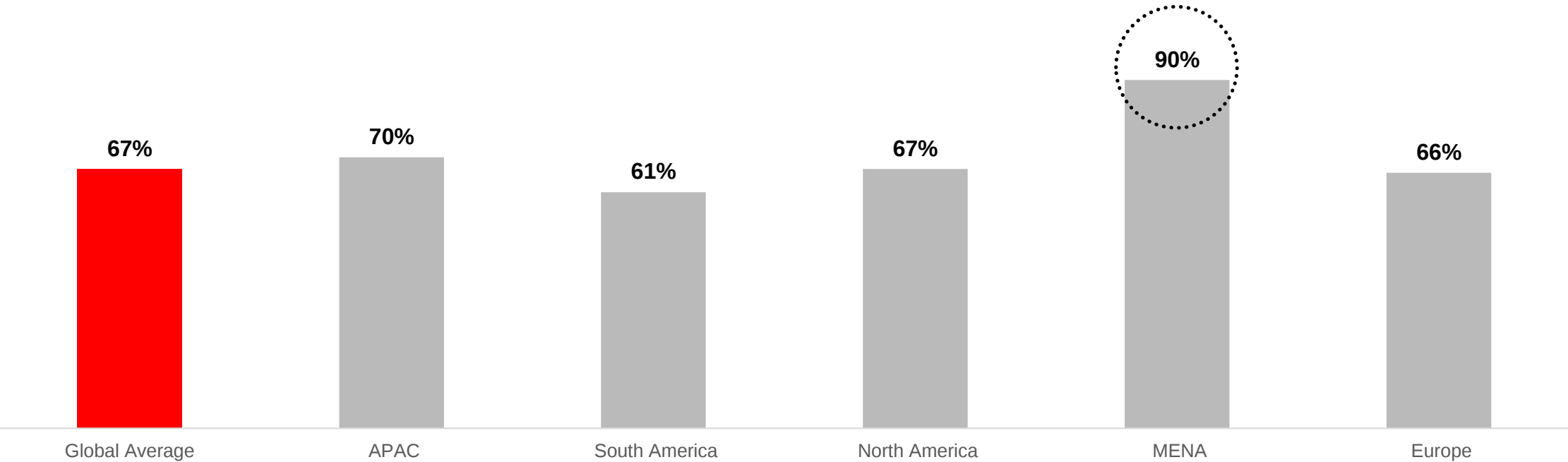


Data is taken from all reached respondents and weighted to national proportions for each market to ascertain an incidence rate of consumers conducting the activity in question. See Appendix for further details.

Globally, 67% of consumers have live streamed video

> Live streaming video is popular in MENA, where 90% say they have live streamed video

Q8. Have you ever watched live video streaming on any device or platform? Please select all that apply. (Net: Yes, on any device)



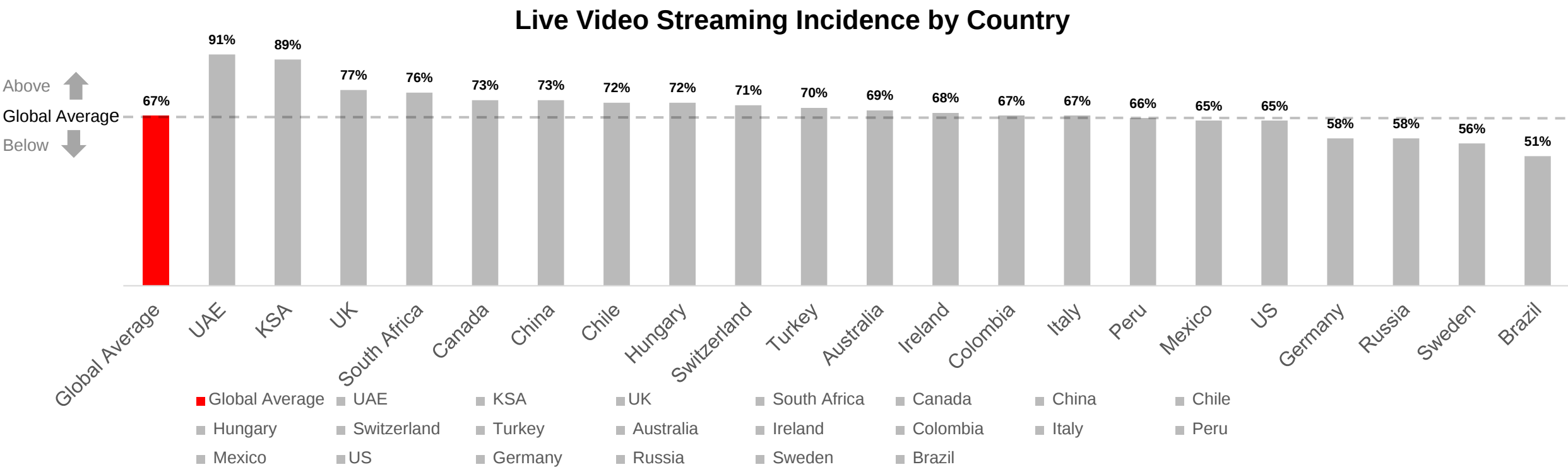
Markets Include: North America (N=600): Canada, Mexico, United States. Europe & Africa (N=2000): Germany, Hungary, Ireland, Italy, Russia, South Africa, Sweden, Switzerland, Turkey, United Kingdom. APAC (N=400): Australia, China. MENA (N=400): Kingdom of Saudi Arabia, United Arab Emirates. South America (N=800): Brazil, Chile, Colombia, Peru

Data is taken from all reached respondents and weighted to national proportions for each market to ascertain an incidence rate of consumers conducting the activity in question. See Appendix for further details.

Nearly two-thirds of respondents globally have viewed live streamed video

- > Roughly 9 in 10 respondents in United Arab Emirates and Saudi Arabia have viewed live streaming video
- > Roughly three-quarters of respondents in the U.K., South Africa, Canada, and China have viewed live streamed video
- > Germany, Russia, Sweden, and Brazil are less likely to have live streamed video

Q8. Have you ever watched live video streaming on any device or platform? Please select all that apply.



Please note: Data is taken from all reached respondents and weighted to national proportions for each market.

Base: All respondents (4200), APAC (400), South America (800), North America (600), MENA (400), Europe (2000), per market (200)

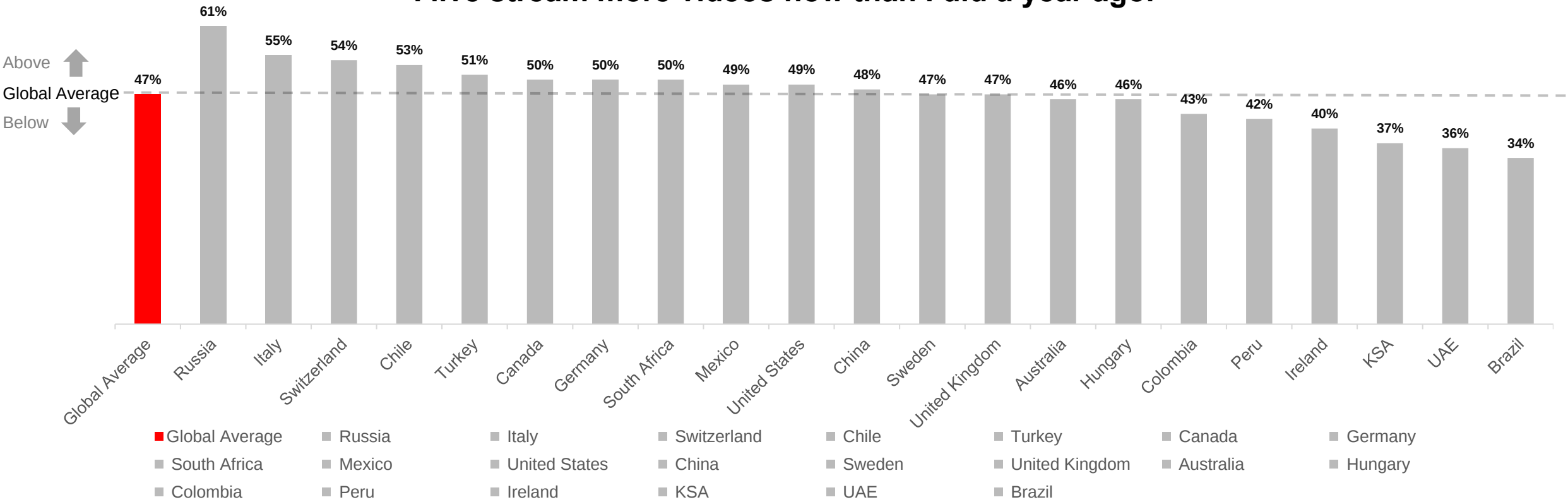
Significantly higher/lower. Tested at 95% confidence interval.

Live streaming video is on the rise globally: 47% say they now stream more live videos than last year

While consumers in Russia are less likely to have live streamed video, those who do live stream are more likely to have increased their viewing

Q22. Which of the following do you agree with regarding live streaming video? (Agree. Top 2 box.)

“I live stream more videos now than I did a year ago.”



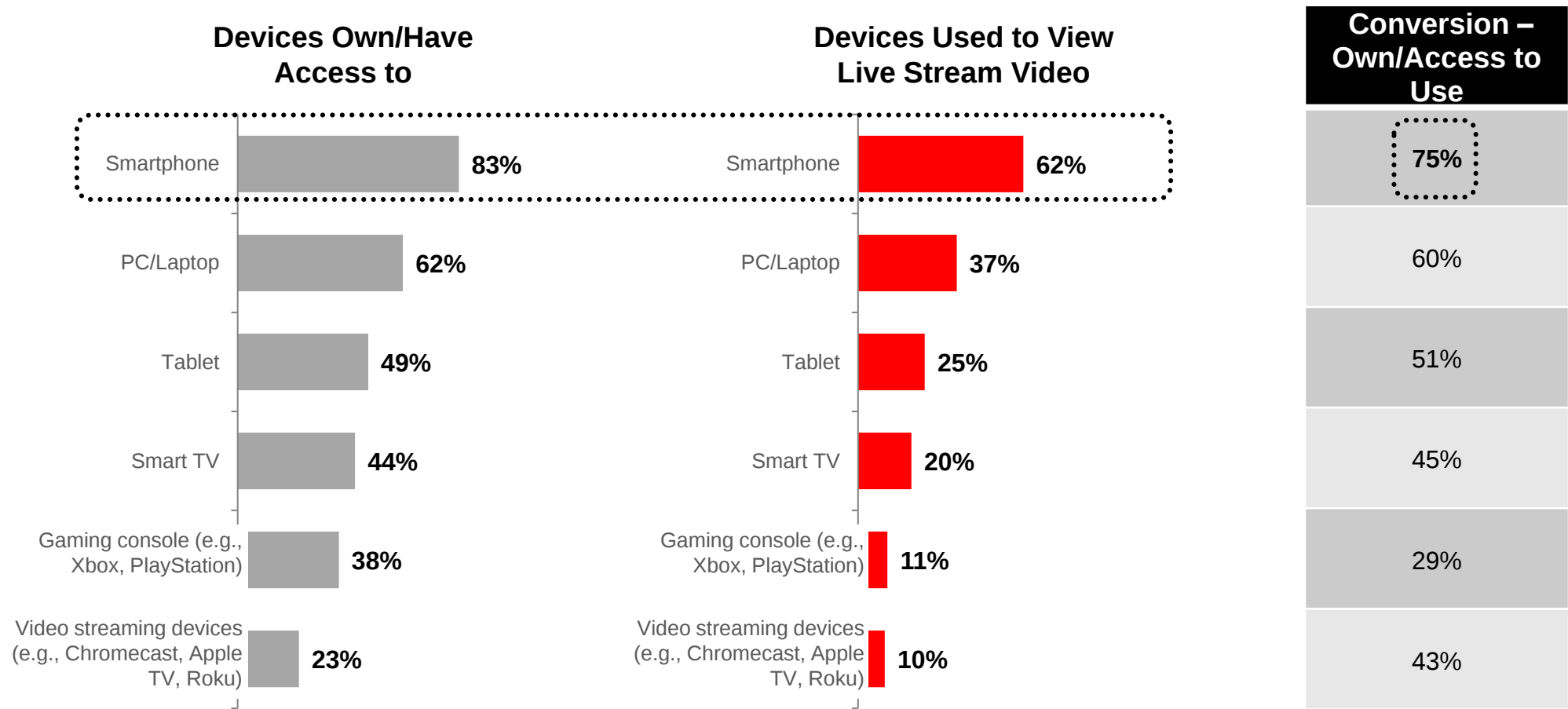
Which Devices Are Used and How Frequently for Live Video Streaming

Smartphones facilitate frequency of access – but do not command the most screen time

- **Smartphones are the most popular device (62%) to live stream video content and are used most frequently, followed by smart TVs**
- **However, when it comes to time spent – consoles, smart TVs and specific streaming devices are used for longer periods of live content consumption**
 - Significantly more consumers use these other devices when accessing live video content for 2 hours or more, no doubt influenced by screen size and the type of content being consumed
 - Smartphones and tablets are used for shorter live streaming

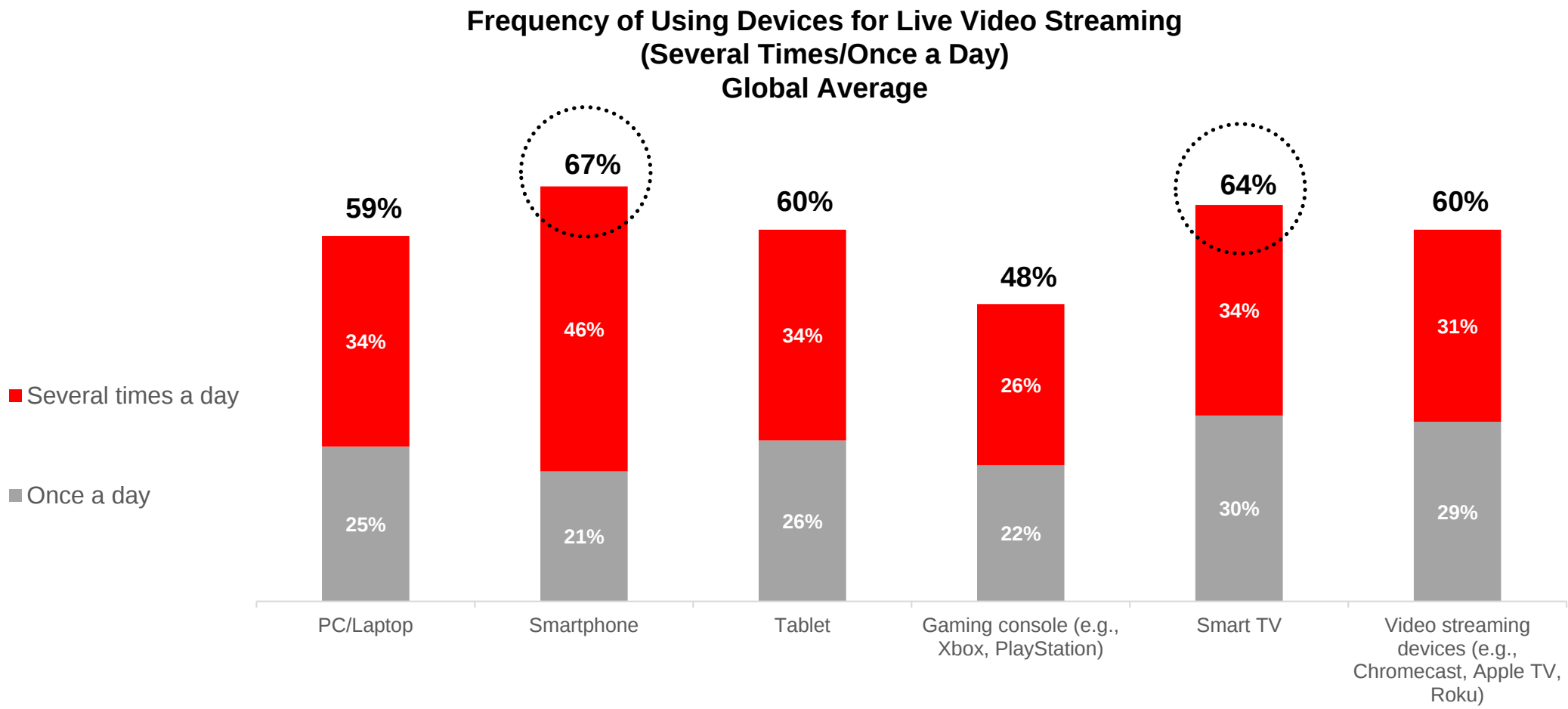
At 62%, smartphones are the most popular device to live stream video content

Q4. And which of the following devices do you own or have access to? Please select all that apply, Q10. Which of the following device(s) do you use for live video streaming? Please select all that apply.



Unsurprisingly, smartphones are also the device used most frequently to access live video content, followed by Smart TVs

Q11. And how frequently do you use the following device/s for live video streaming?



However, when it comes to time spent, Smart TVs, streaming devices, gaming consoles, and computers are used for longer periods of live content consumption

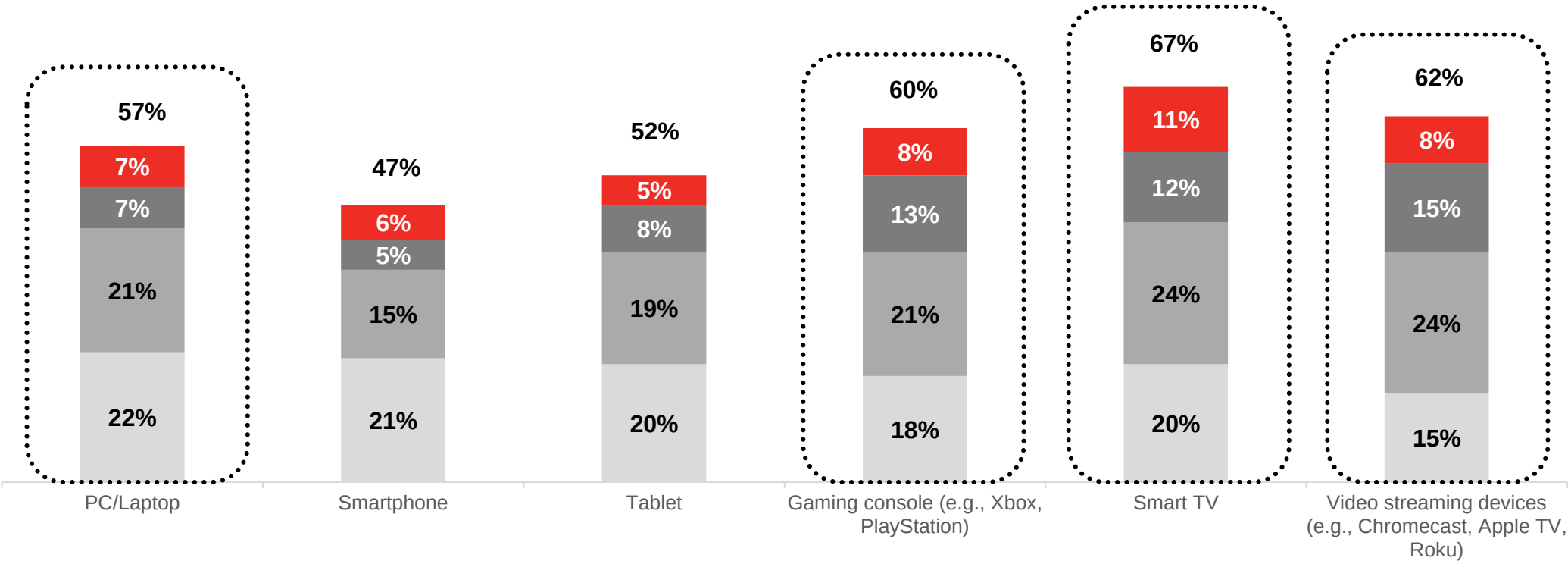
Q12. On a typical occasion when you are live video streaming, how much time do you spend live video streaming on the following devices? (Global Average)

% Who Typically Live Stream on this Device for Over 30 Min.

Long Form

Typically live stream on device for more than 30 min.

- More than 3 hours
- 2 to 3 hours
- 1 to 2 hours
- 30 to 60 minutes



Smartphones and tablets are used for short live streaming

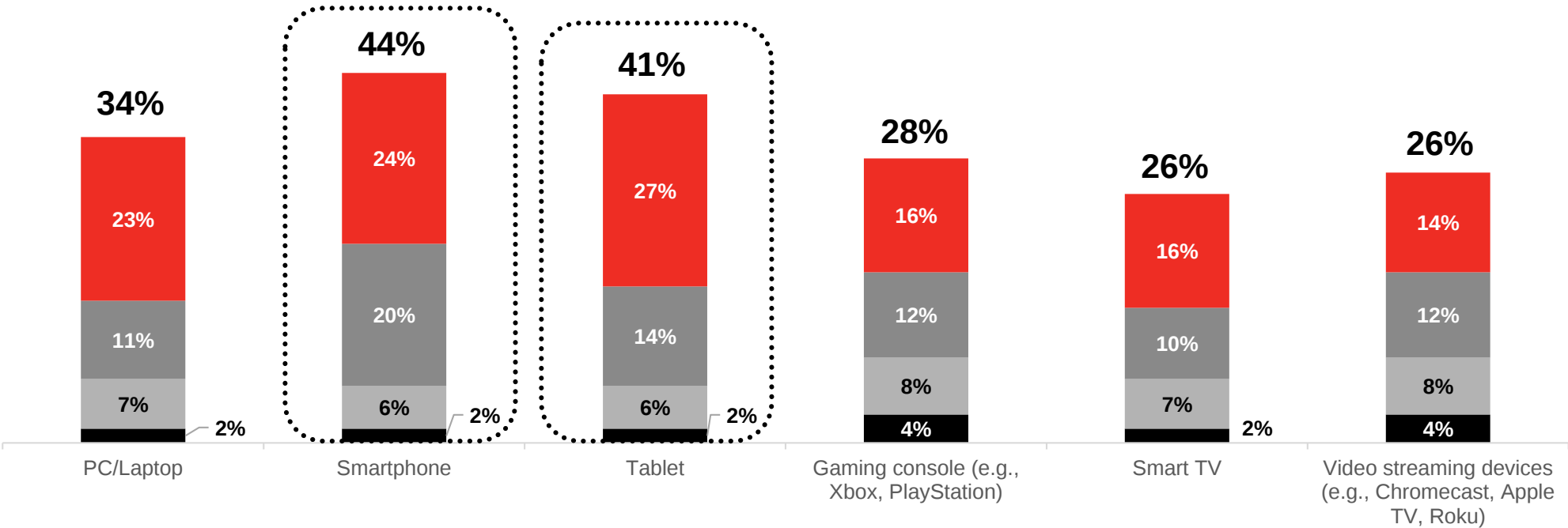
Q12. On a typical occasion when you are live video streaming, how much time do you spend live video streaming on the following devices? (Global Average)

% Who Typically Live Stream on this Device for Under 30 Min.

Short Form

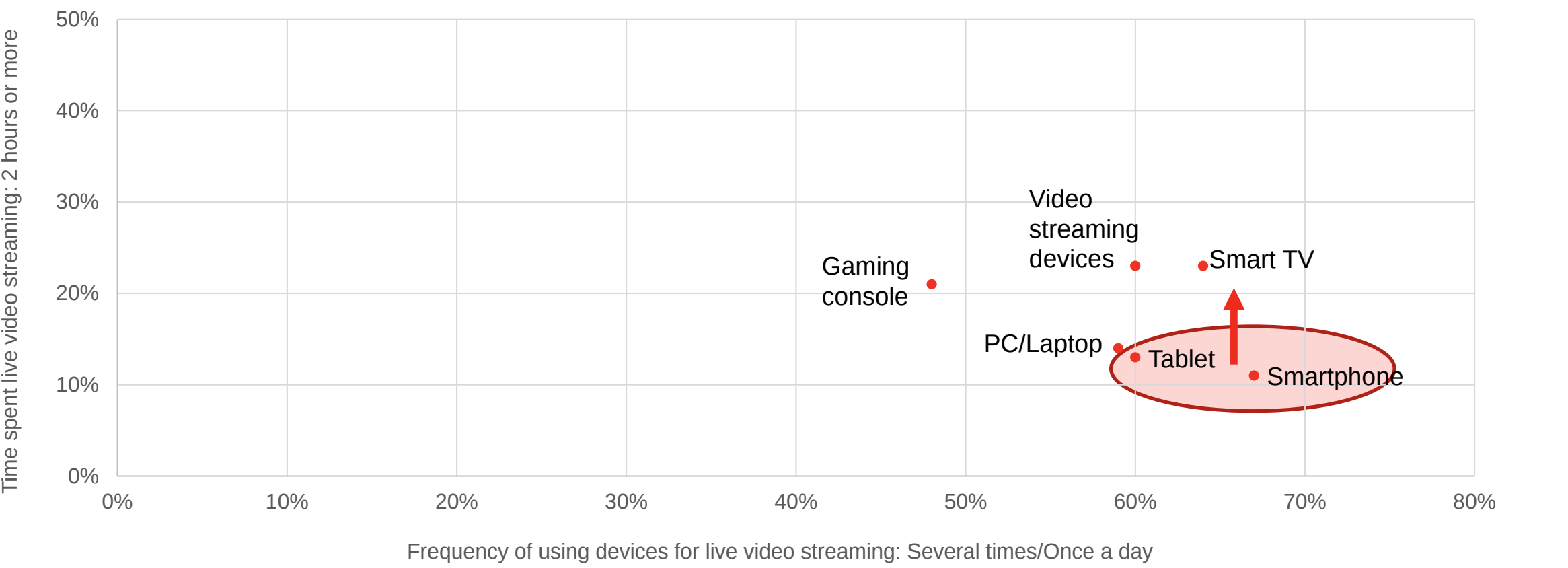
Typically live stream for less than 30 min.

- 10 to 30 minutes
- Under 10 minutes
- It varies
- Not sure



This frequency versus time pattern identifies growth opportunities for ‘mobile devices’ in terms of converting stronger usage into screen time

Q11. And how frequently do you use the following device(s) for live video streaming? **Q12.** On a typical occasion when you are live video streaming, how much time do you spend live video streaming on the following devices?



Sources of Live Streamed Video

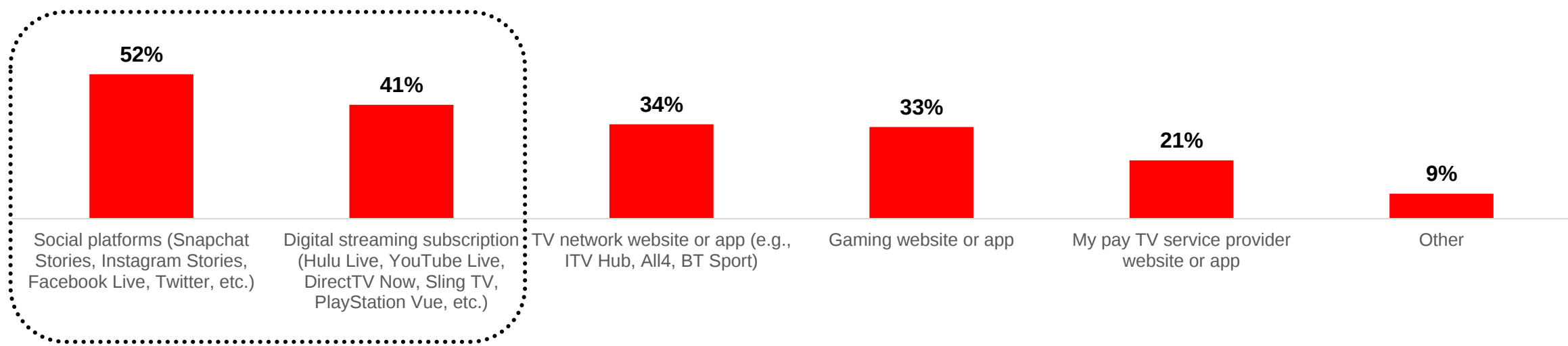
Social platforms are the key source of live video content and TV episodes are the most popular type of live video content

- **Social platforms (51%) followed by digital streaming subscriptions (41%) are the most popular sources for live video streaming content**
 - Interestingly, in MENA there is less of an influence of these platforms, while in South America their influence is the strongest
- **The most popular form of live video content accessed is TV series/episodes**
 - 65% plan to live stream matches from the forthcoming FIFA World Cup 2018
 - Analysis by market reveals some interesting sub trends: For example, in China there is clear appetite for 'influencer content,' while in MENA news and videos by friends/family are more popular

Social platforms followed by digital streaming subscriptions are the most popular sources of live stream video content

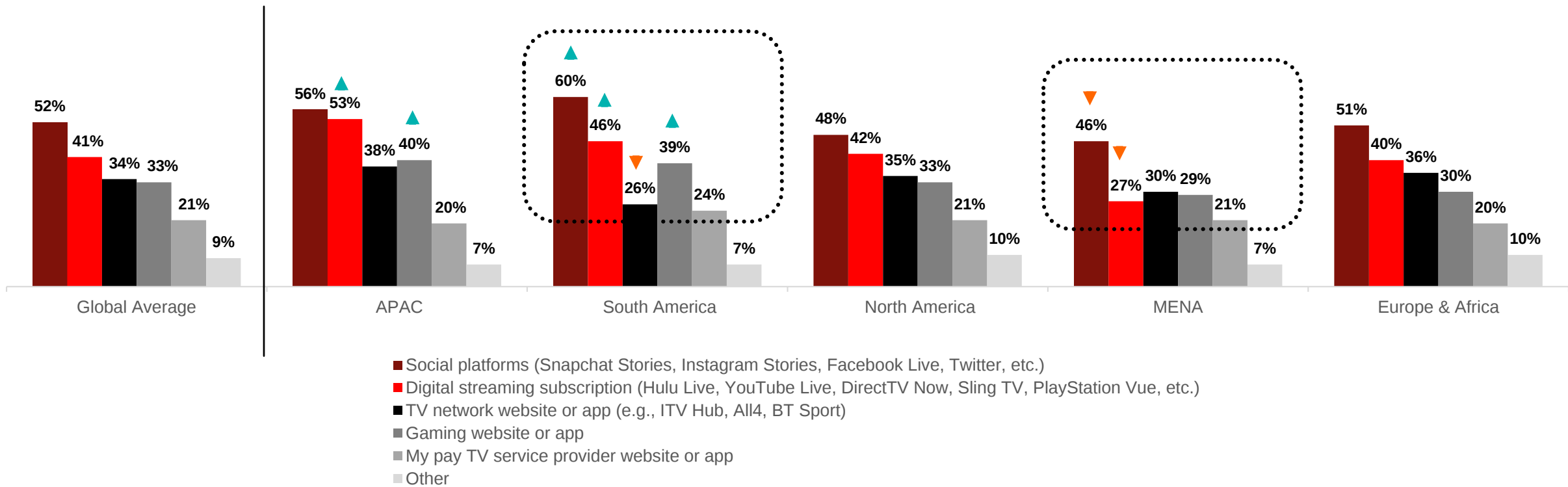
Q14. Which of the following sources do you live stream video content from? Please select all that apply.

Sources of Live Video Stream



In MENA, there is less reliance on social platforms and digital subscriptions for live video content, while in South America the reverse is true

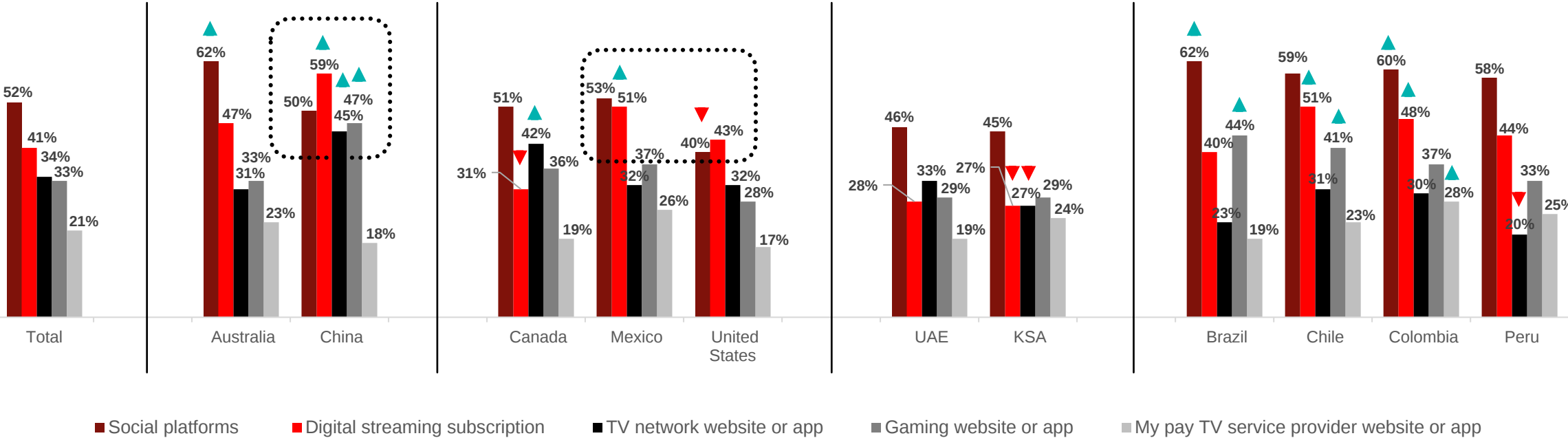
Q14. Which of the following sources do you live stream video content from? Please select all that apply.



Streaming subscriptions, TV network sites, and gaming apps are used significantly more as a source of live video content in China

➤ Streaming subscriptions are the top source of live streamed content in the U.S. and nearly equal to social media in Mexico

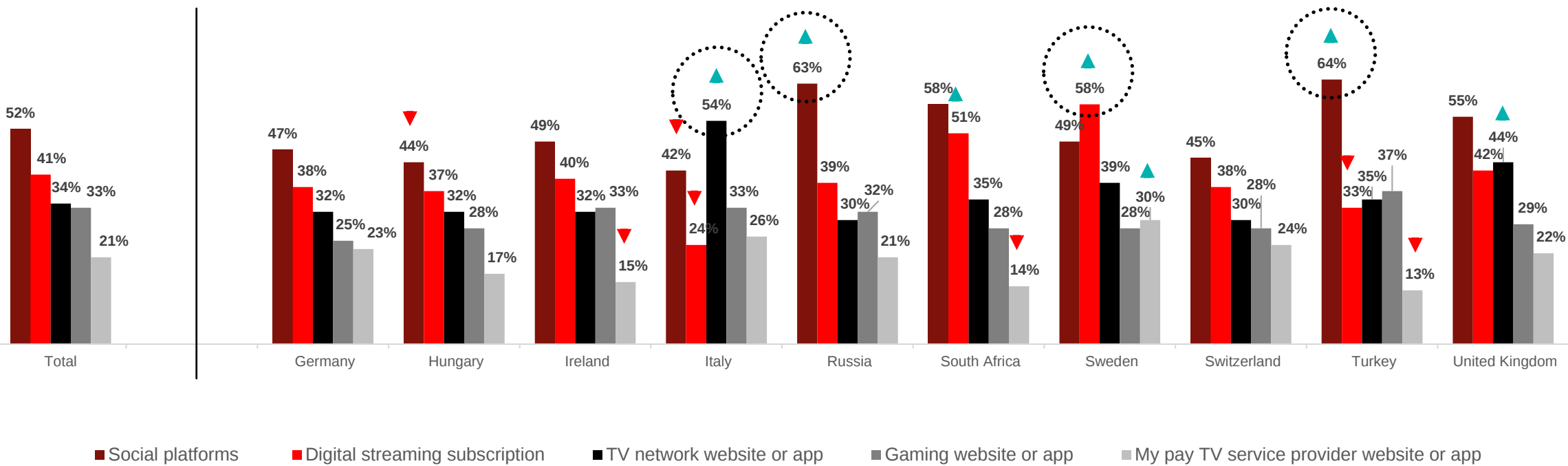
Q14. Which of the following sources do you live stream video content from? Please select all that apply.



Social platforms are the preferred source for live streamed video in Turkey and Russia

- Italy favors TV network websites and apps
- Sweden rivals China when it comes to streaming live video content from digital subscription services

Q14. Which of the following sources do you live stream video content from? Please select all that apply.

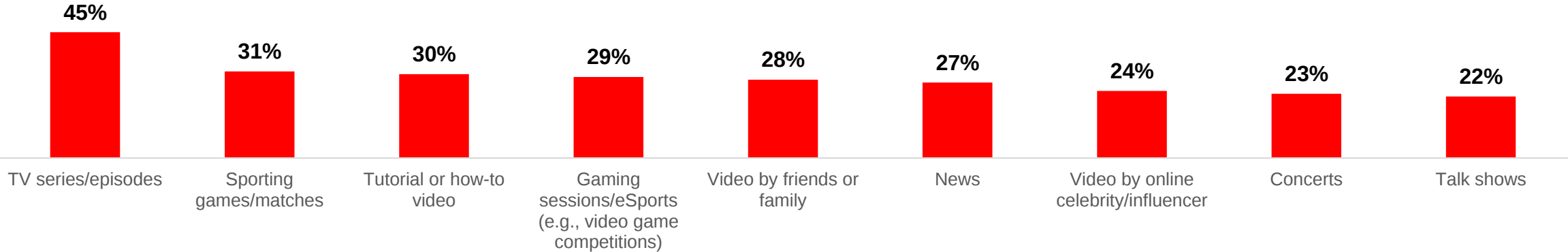


Types of Video Content Live Streamed

TV series/episodes are the most preferred content type streamed, followed by sports, tutorials, gaming, and news

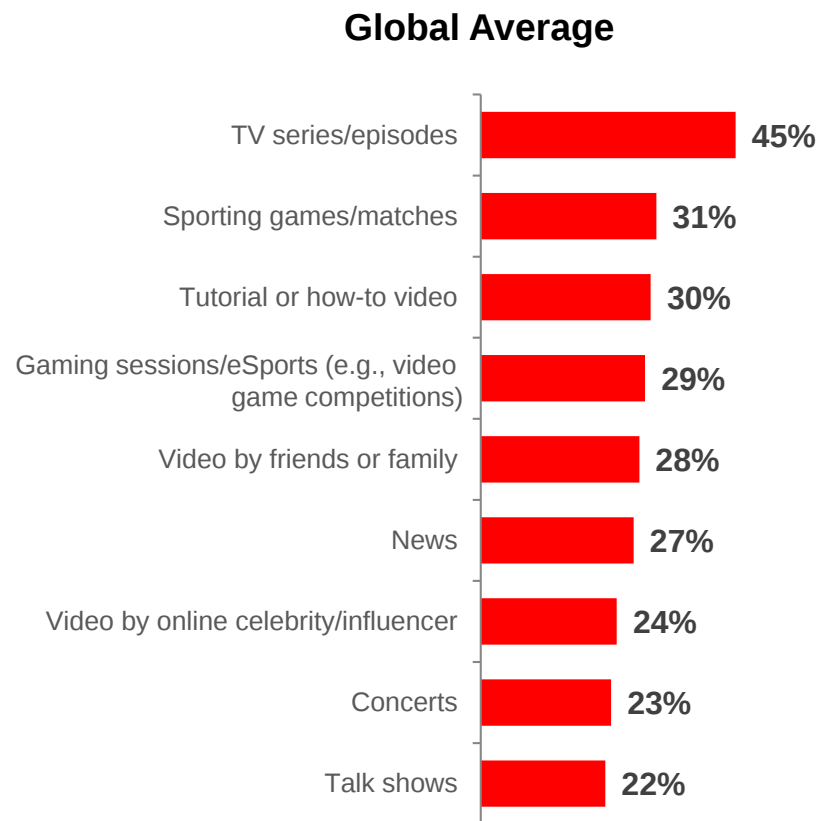
Q16. And what type(s) of content do you typically live video stream? Please select all that apply.

Typical Content Types Live Streamed



Consumers in South America are more likely to live stream sports

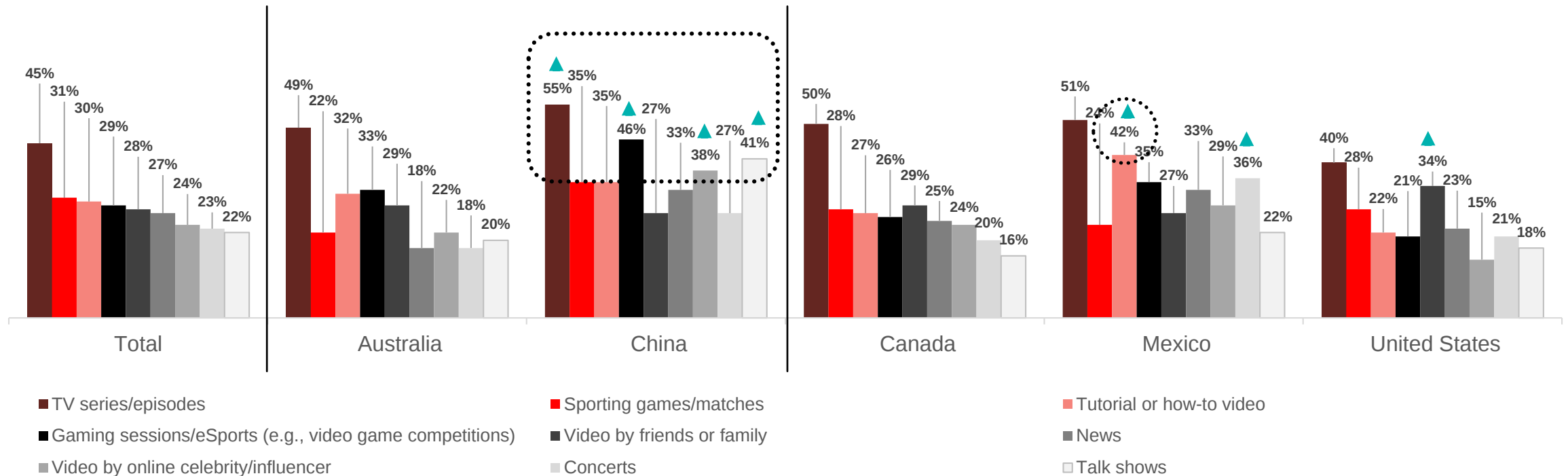
Q16. And what type(s) of content do you typically live video stream? Please select all that apply.



APAC	South America	North America	MENA	Europe
52%	52%	47%	28%	44%
28%	38%	27%	25%	32%
33%	43%	30%	19%	27%
40%	28%	27%	18%	30%
28%	29%	30%	32%	27%
25%	28%	27%	26%	27%
30%	31%	23%	21%	22%
23%	28%	26%	18%	22%
31%	22%	19%	20%	22%

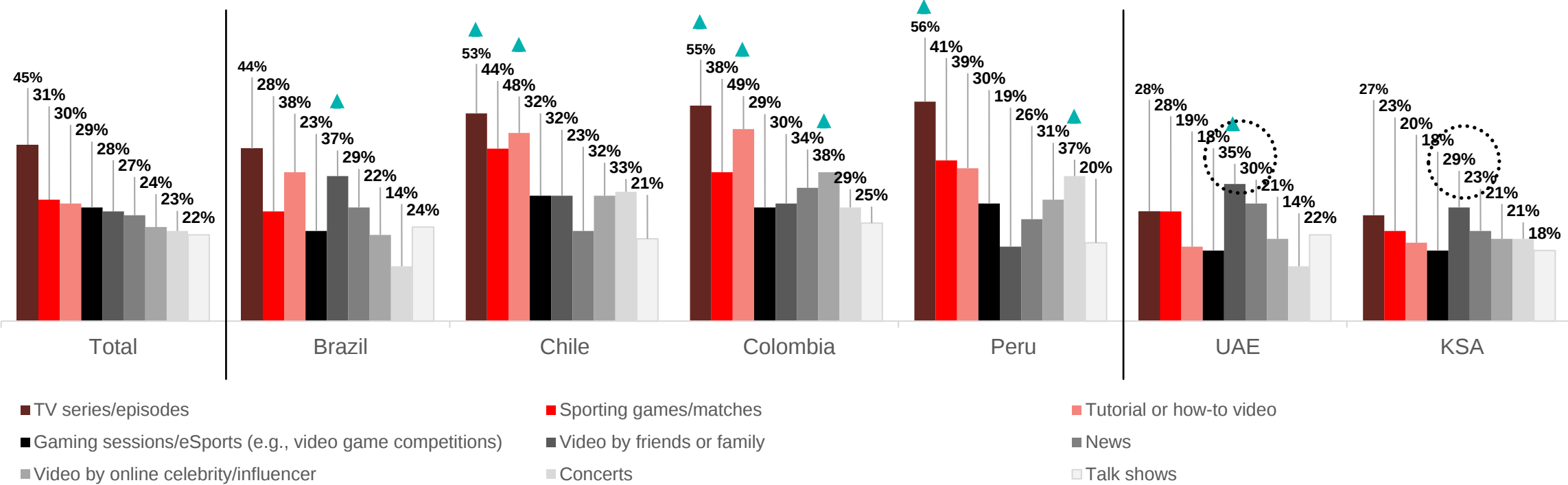
Gaming, 'influencer videos,' and talk shows are significantly more popular in China, while tutorials and how-to videos are more popular in Mexico

Q16. And what type(s) of content do you typically live video stream? Please select all that apply.



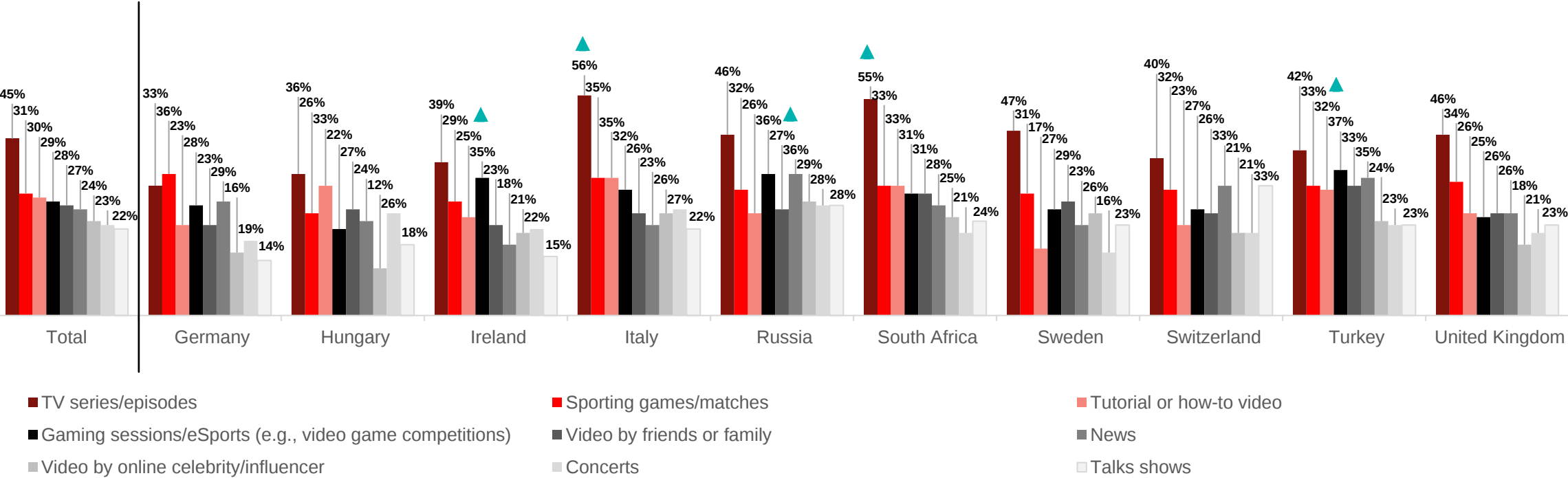
News and videos by friends/family are popular in Saudi Arabia and the United Arab Emirates

Q16. And what type(s) of content do you typically live video stream? Please select all that apply.



Social networks and sports are the primary choices across Europe, while gaming has appeal in Ireland, Russia, and Turkey

Q16. And what type(s) of content do you typically live video stream? Please select all that apply.



Live Streaming the World Cup

Nearly two-thirds plan to live stream the 2018 World Cup globally while around half plan to watch video recordings of matches online or on TV

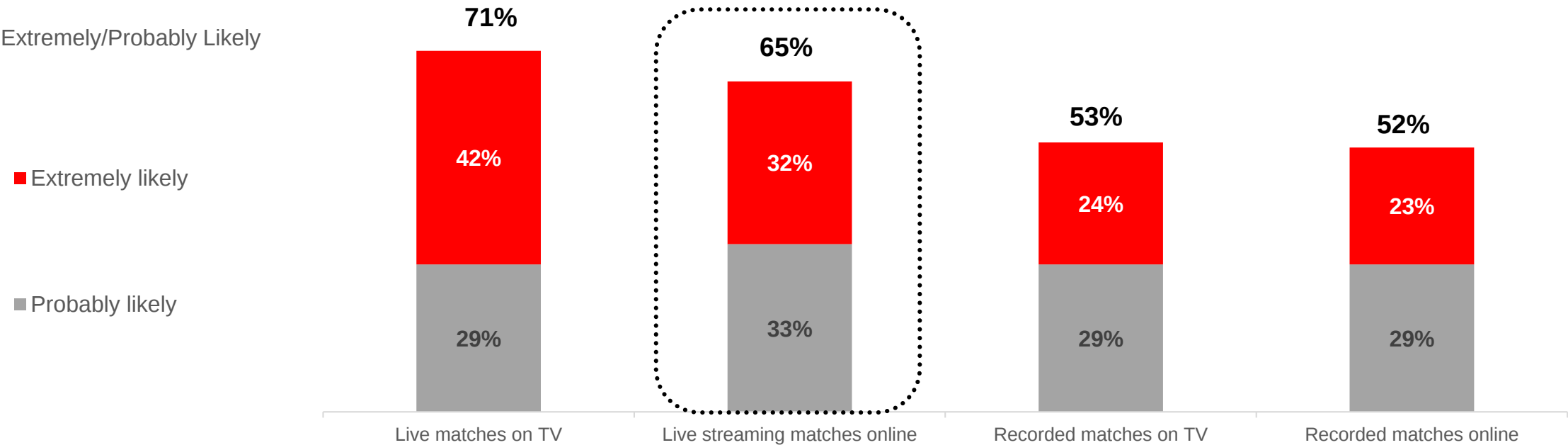
- **71% will watch live matches of the FIFA World Cup 2018 via TV and 65% will live stream matches**
- **TVs and smartphones are the primary channels to watch/follow the 2018 World Cup**
- **Smartphones will be used significantly more in APAC, the same is true for TV in South America**

71% will watch live matches of the FIFA World Cup 2018 on TV and 65% will live stream matches

> While nearly two-thirds plan to live stream the World Cup, only half plan to watch recorded matches – either online or on TV

Q26. Thinking about the forth coming 2018 FIFA World Cup in Russia how likely are you to...

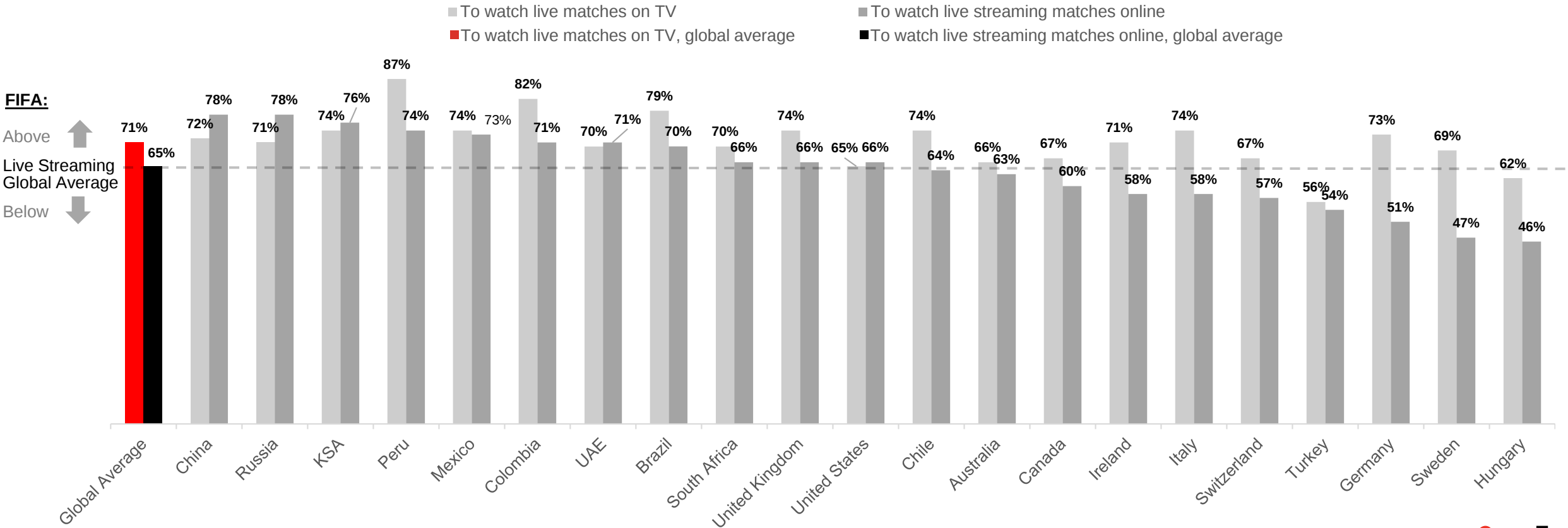
Watch 2018 FIFA World Cup as...



Nearly two-thirds plan to live stream the 2018 World Cup globally

➤ China, Russia, Saudi Arabia, Peru, Mexico, Colombia, the United Arab Emirates, Brazil, South Africa, the U.K. and the U.S. have the strongest likelihood to live stream World Cup matches

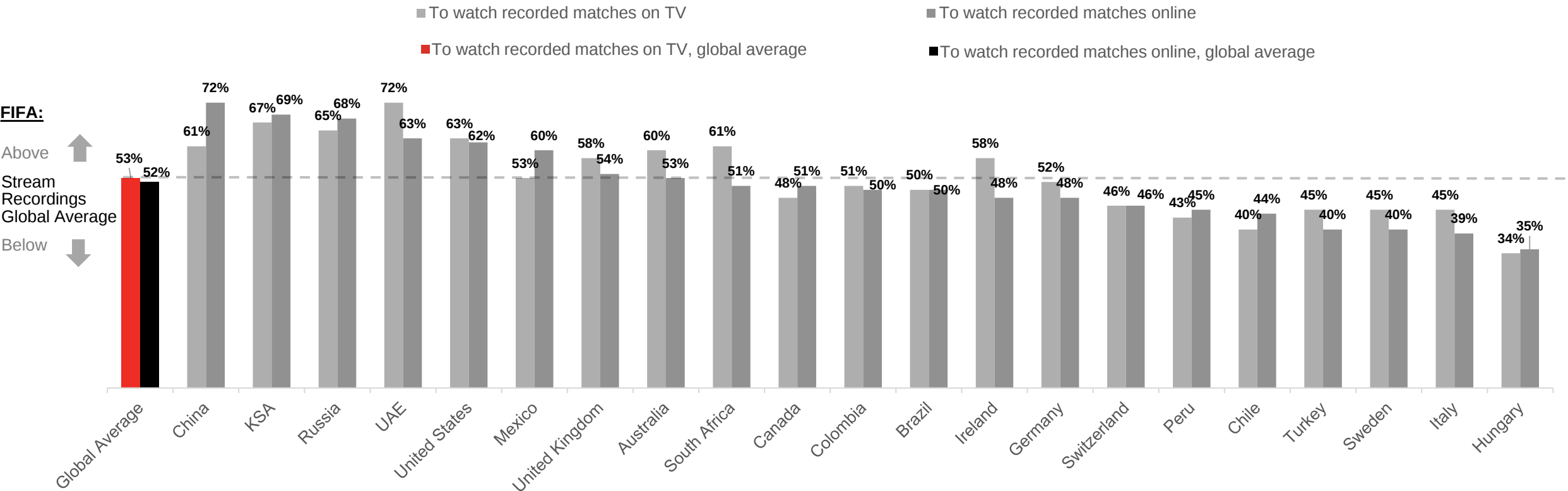
Q26. Thinking about the forth coming 2018 FIFA World Cup in Russia how likely are you to...



Over half plan to stream video recordings of the 2018 World Cup or watch TV recordings, globally

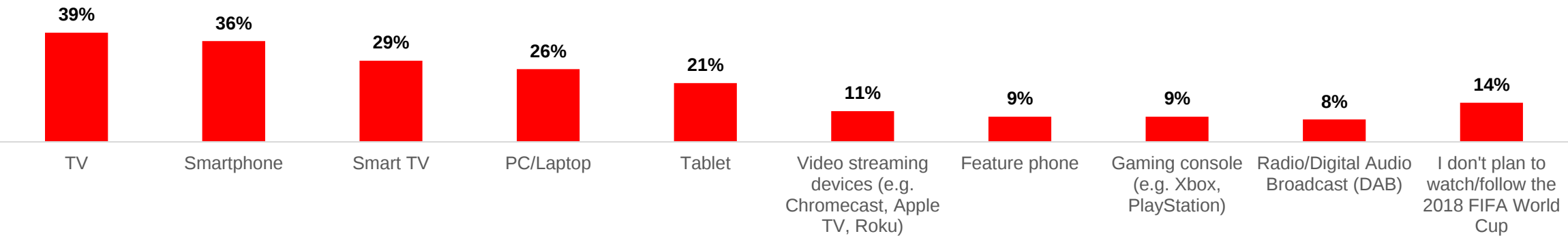
> China, Saudi Arabia, Russia, United Arab Emirates, the U.S., Mexico, U.K. and Australia are likely to stream video recordings of the World Cup

Q26. Thinking about the forth coming 2018 FIFA World Cup in Russia how likely are you to...



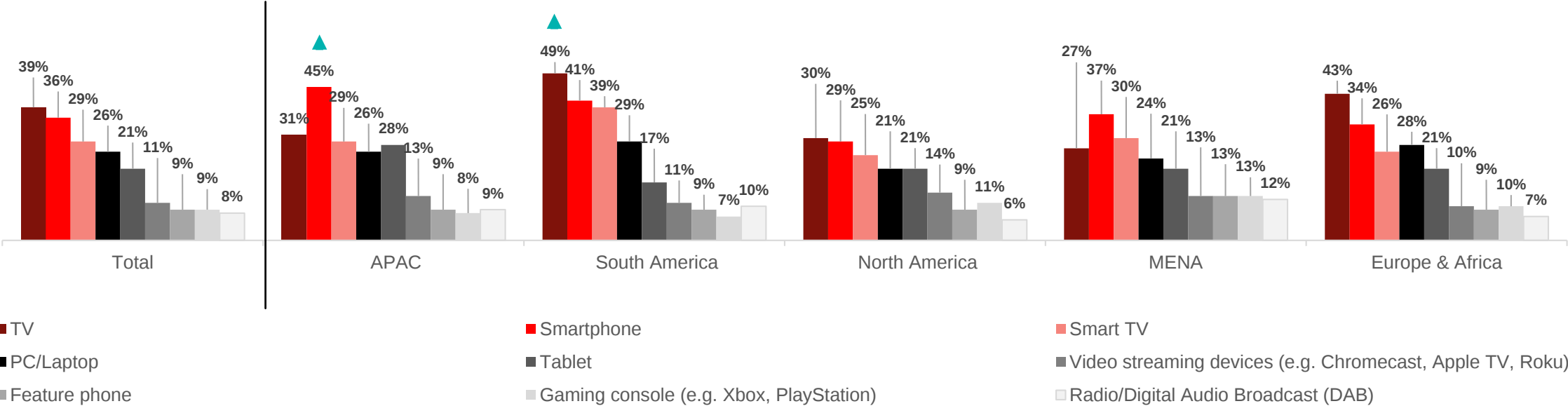
TVs and smartphones are the two primary channels to watch/follow the 2018 World Cup

Q25. Thinking about the forth coming 2018 FIFA World Cup in Russia. Which if any, of the following media channels and devices do you plan to use to watch/follow the 2018 FIFA World Cup?



In APAC, smartphones will be used significantly more while the same is true for TV in South America

Q25. Thinking about the forth coming 2018 FIFA World Cup in Russia. Which if any, of the following media channels and devices do you plan to use to watch/follow the 2018 FIFA World Cup?



Subscriptions and Advertising

Consumers interact with advertising during live streaming sessions – but ad experiences could be less disruptive and more engaging

➤ **Consumers who live stream are open to advertising encounters in exchange for free content**

- 52% globally say they would rather watch free live streamed video content that has ads in it
- There is a clear opportunity to monetize in MENA, where 36% say they would rather pay per individual video streamed without any advertising. APAC also offers opportunities, with 27% stating the same

➤ **Advertising encounters are common across all streaming avenues and consumers do act on them**

- Pop ups, pre-roll, and sponsored-by ad units are the ads most visible to consumers
- 64% have acted as a result of these encounters – recalling the brand advertised and clicking on the ad unit the primary actions provoked – indicating that advertising in this environment can help brand build

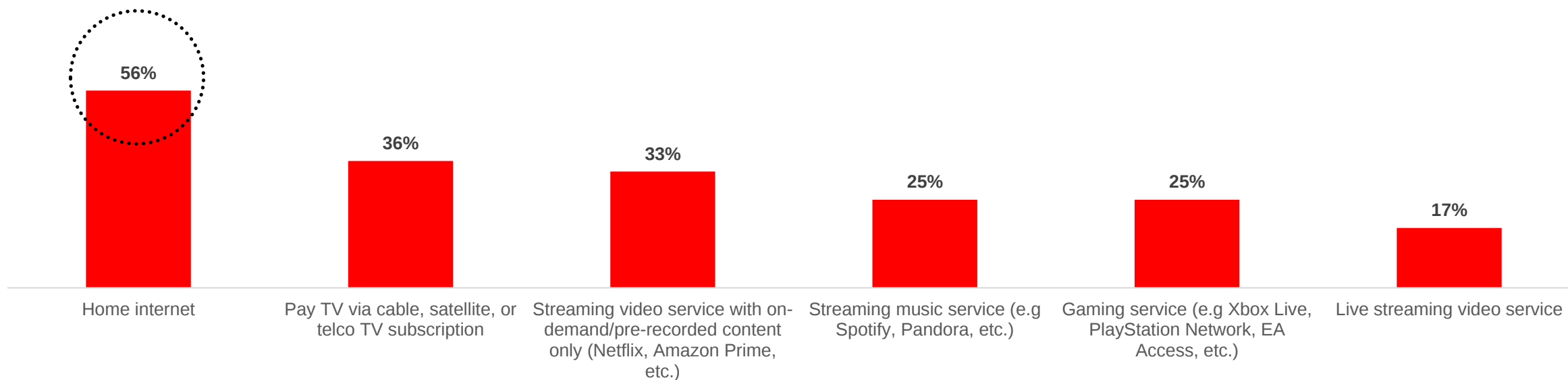
➤ **However, these encounters could be more engaging and less disruptive**

- While consumers notice the advertising they come across when live streaming, when compared to the advertising encounters they have on live TV there is currently little difference in terms of relevance, permission, and creative quality
- Fine tuning media buy and campaign assets to ensure these encounters are seen as different and relevant, as well as being creatively engaging, is a must to capitalize on what previously seen consumption metrics show is a captive and growing audience

Globally, over half pay for home internet service

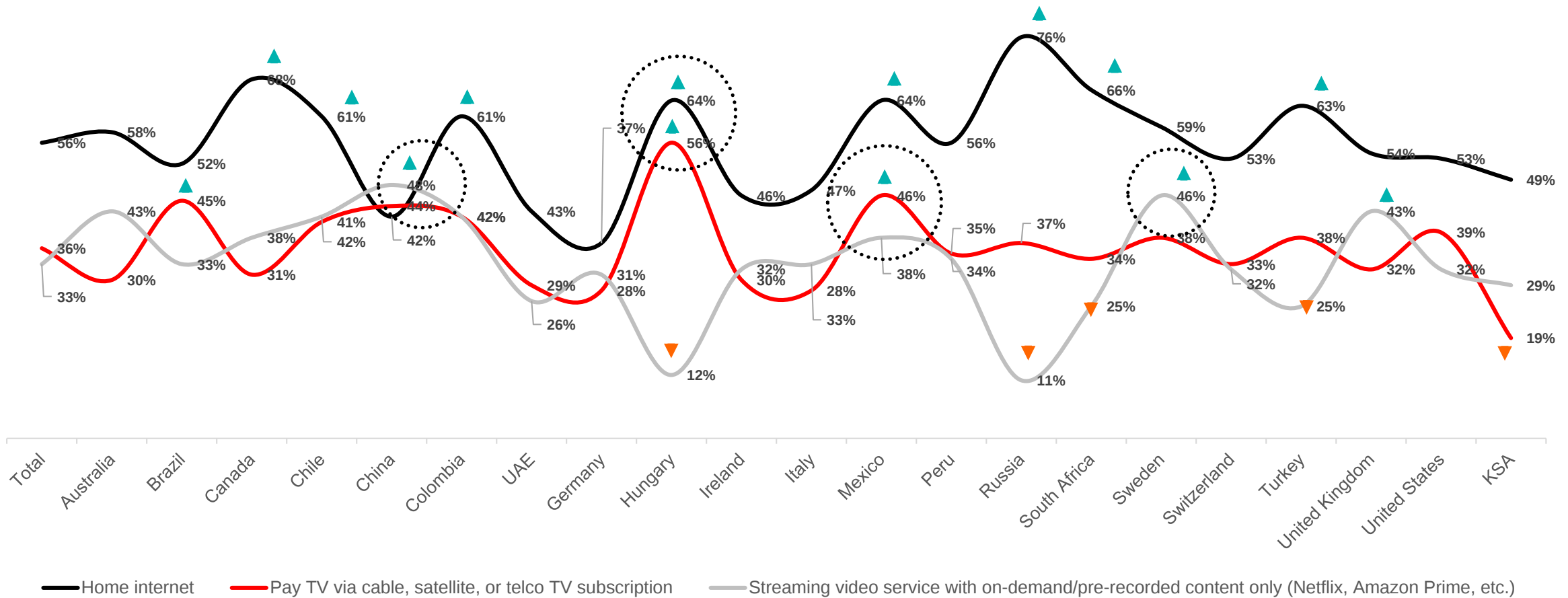
- > Roughly one-third pay for TV or subscription video services
- > One-quarter pay for streaming music or gaming and 17% pay for a live streaming video service

Q23. Which of the following subscriptions do you or your household currently pay for? (Global Average)



Home internet is the most popular paid subscription across all markets, however pay TV and streaming services are also popular

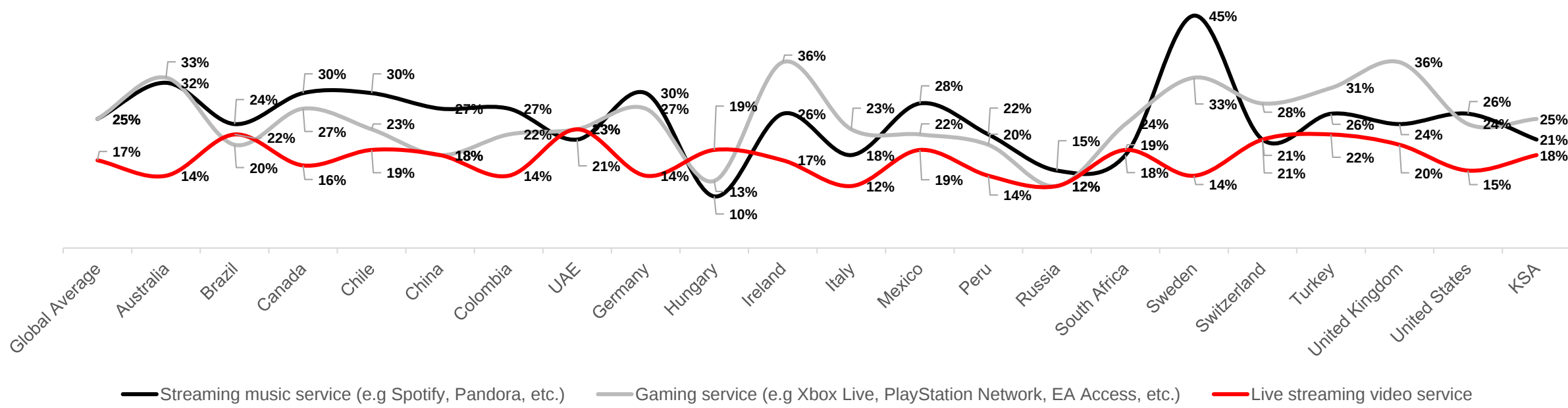
Q23. Which of the following subscriptions do you or your household currently pay for?



Streaming music services are more popular than live streaming video services globally

> Gaming services are more popular in Ireland, Switzerland, Turkey, the U.K., Saudi Arabia, and Australia

Q23. Which of the following subscriptions do you or your household currently pay for?



Live Streaming and Advertising: Opportunities to Engage

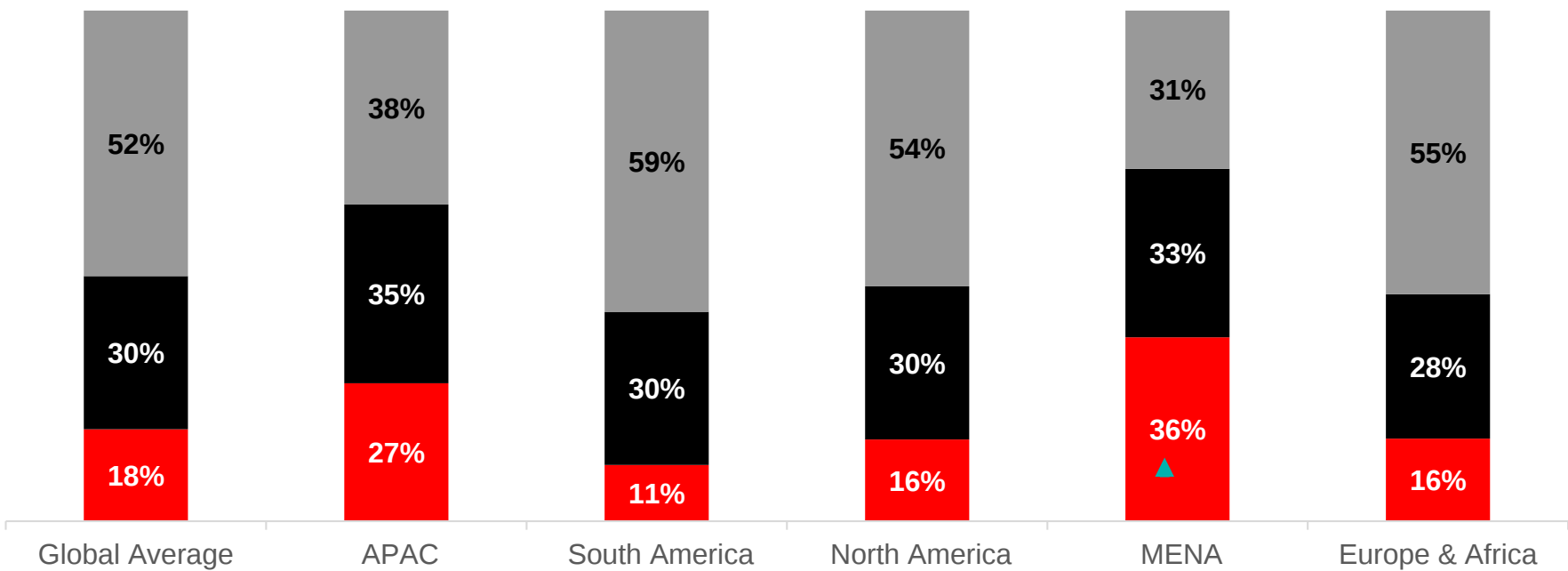
More than half of consumers globally prefer free ad-supported live streaming

- **52% of consumers globally prefer free ad-supported live streaming**
 - Consumers in most countries prefer free ad-supported live video streaming over subscription services or à la carte services
- **64% took action after seeing an ad during a live video stream**
- **Brand recall, clickthrough, and site visitation are the primary actions provoked**
- **Nearly two-thirds of respondents globally have engaged with an ad seen while live streaming video**

Free ad-supported live streaming is favored by consumers in Africa, Europe and the Americas

Q24. Specifically related to live streaming video, would you rather:

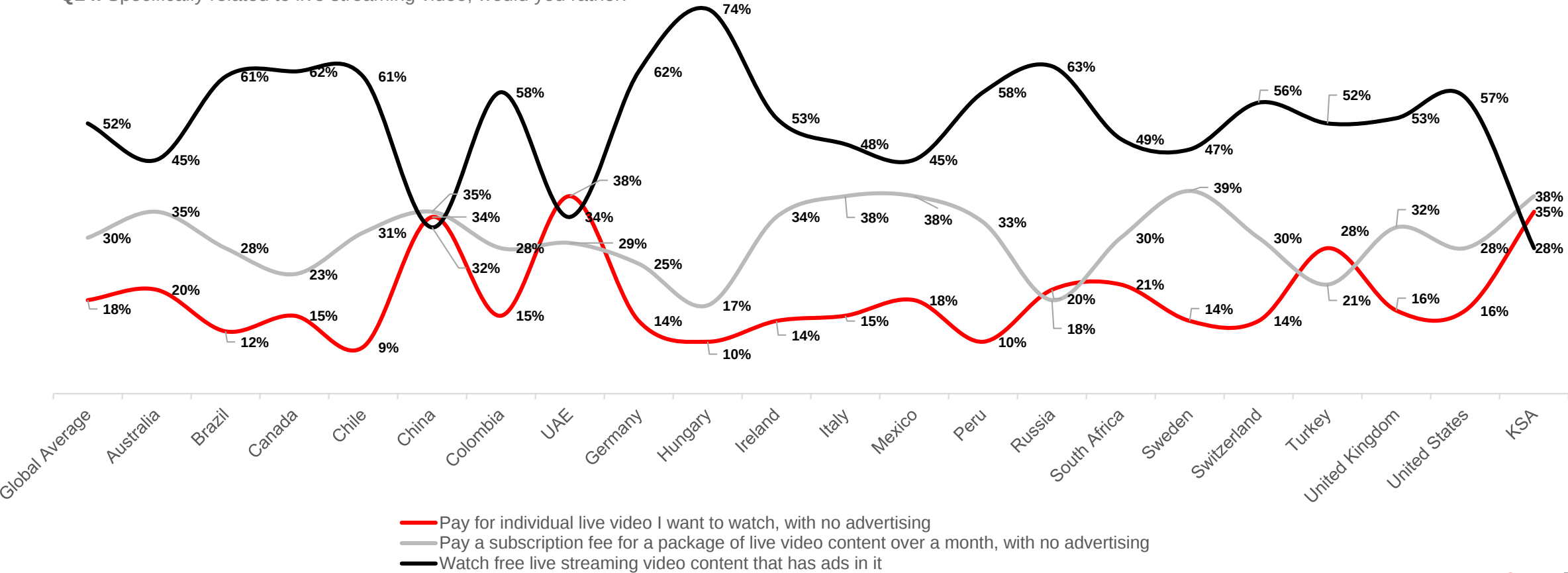
- Watch free live streaming video content that has ads in it
- Pay a subscription fee for a package of live video content over a month, with no advertising
- Pay for individual live video I want to watch, with no advertising



Consumers in most countries prefer free ad-supported live video streaming over subscription or à la carte services

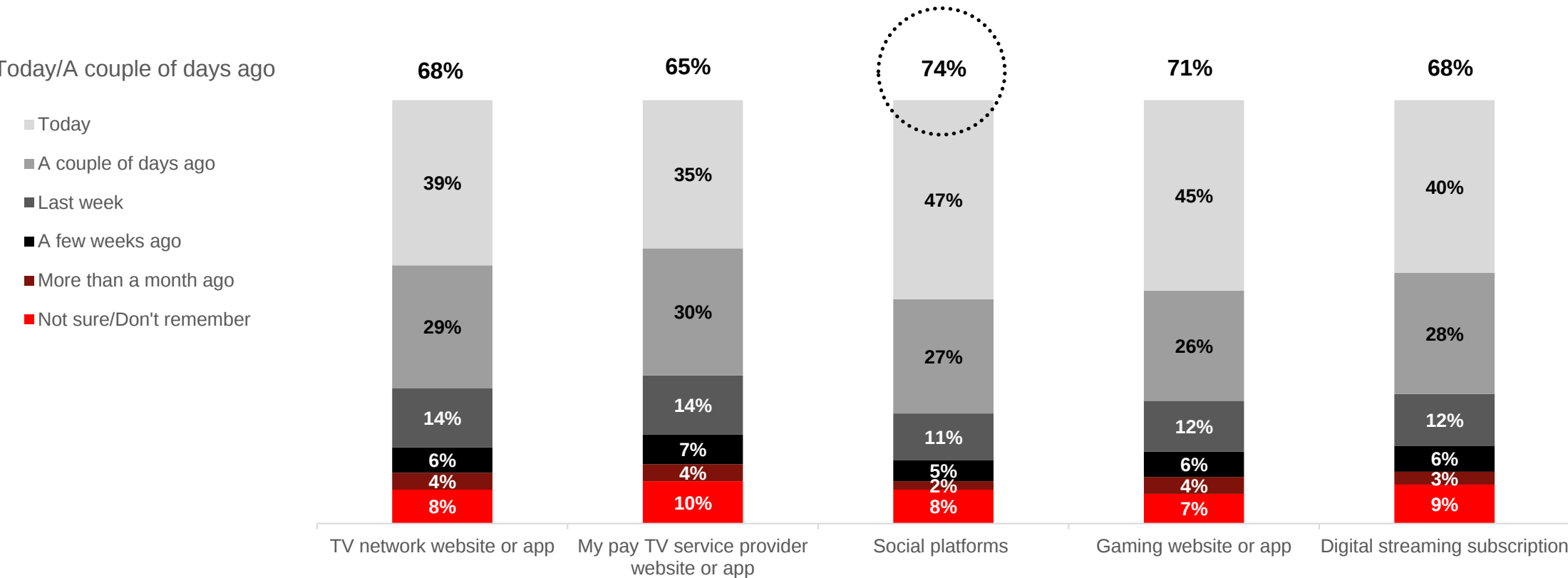
➤ Exceptions are China and Saudi Arabia, where subscription services are preferred and United Arab Emirates, where à la carte services are preferred

Q24. Specifically related to live streaming video, would you rather:



Ads during live streaming video are more frequently seen within social platforms

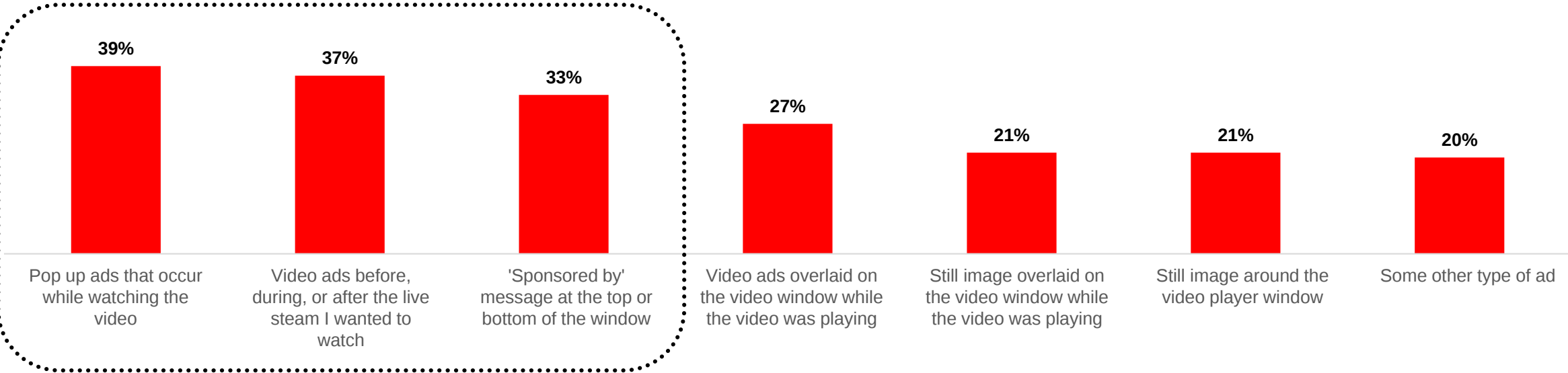
Q28. When was the last time you remember seeing an ad while live streaming on:



Pop ups, pre-roll, and sponsored-by messages are the most common forms of advertising units encountered while live streaming

- > 39% of respondents globally have seen a pop up while watching a live streamed video
- > 37% have seen an in-stream video ad during live streaming and 33% have seen a sponsored message

Q29. Which of the following types of ads have you seen while live streaming?

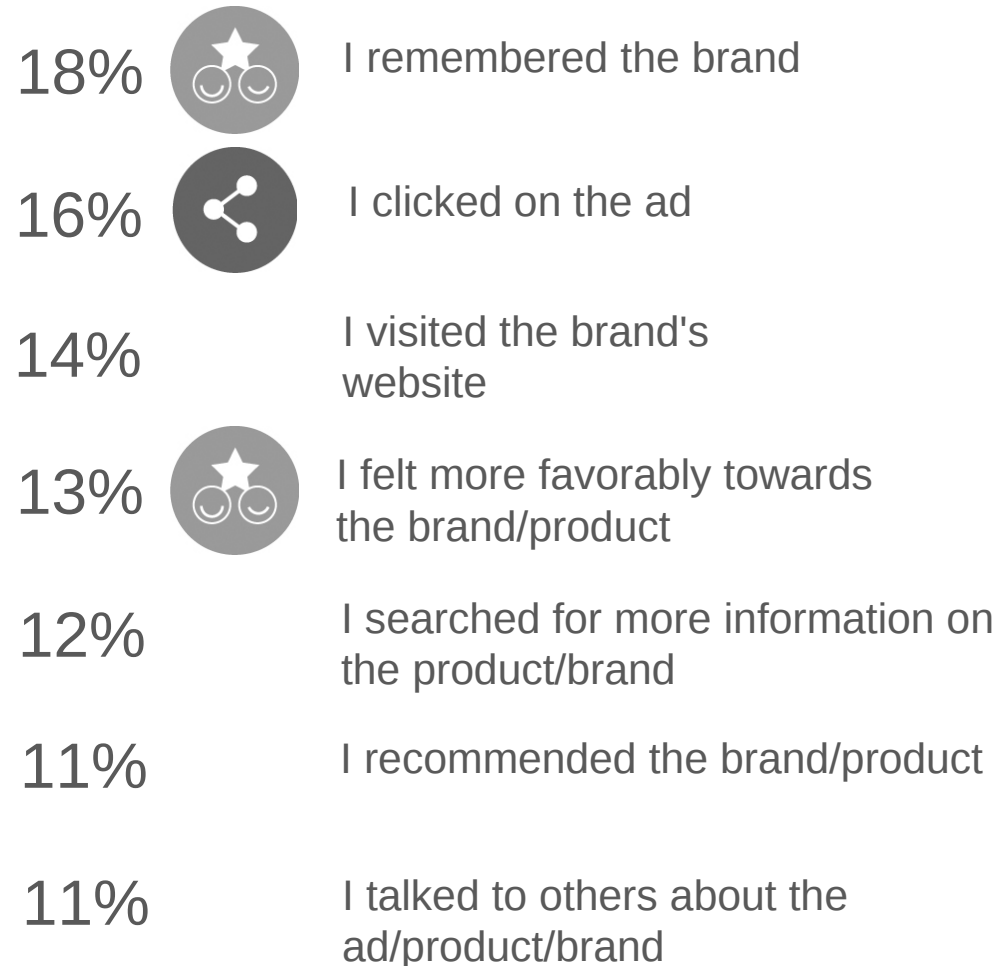


64% took action after seeing an ad during a live video stream – and brand recall, clickthrough, and site visits are the primary actions provoked

Q30. Next we would like you to think about the last ad you saw while live streaming. Which of the following describes what you did?



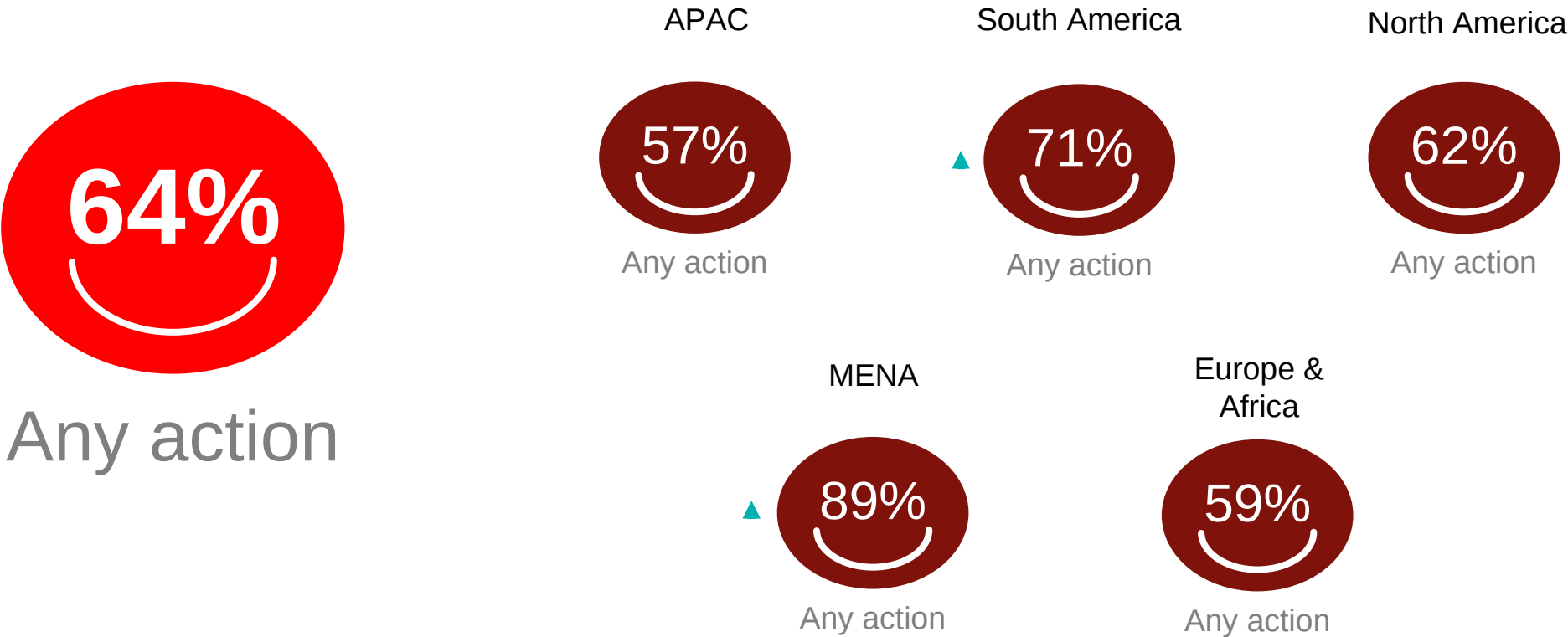
Any action



64% engage with advertising while live streaming. In MENA, this increases to 89%.

> South America is also more responsive to advertising with 71% engaging with an ad during a video live streaming session

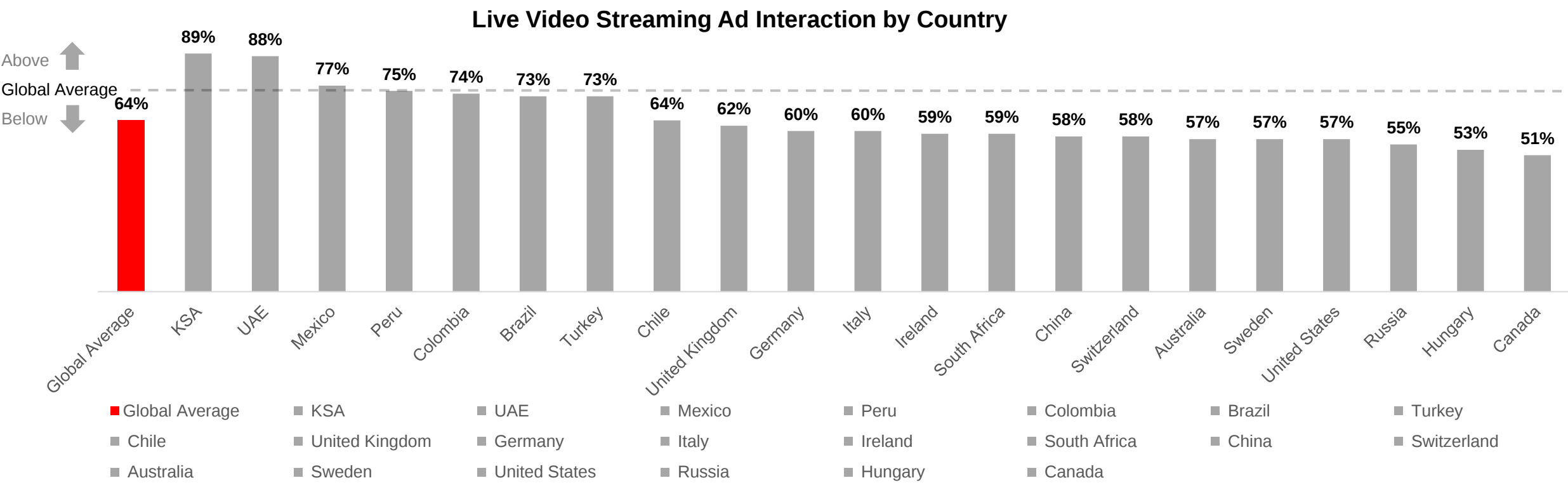
Q30. Next we would like you to think about the last ad you saw while live streaming. Which of the following describes what you did?



Nearly two-thirds of respondents globally have engaged with an ad seen while live streaming video

> Saudi Arabia, the United Arab Emirates, Mexico, Peru, Colombia, Brazil, and Turkey are more likely to engage with ads seen during live streaming video

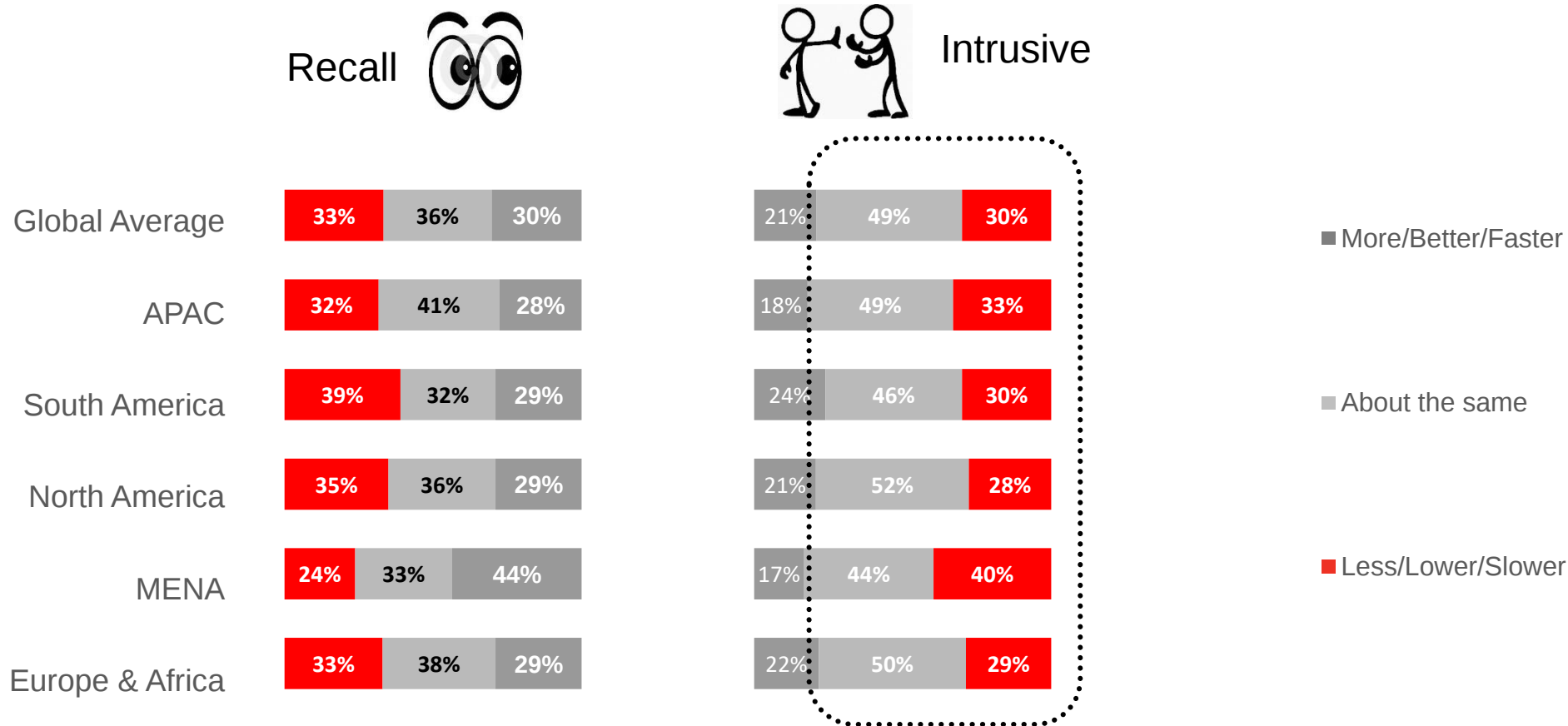
Q30. Next we would like you to think about the last ad you saw while live streaming. Which of the following describes what you did?



Note: Data is taken from all reached respondents and weighted for national proportions.

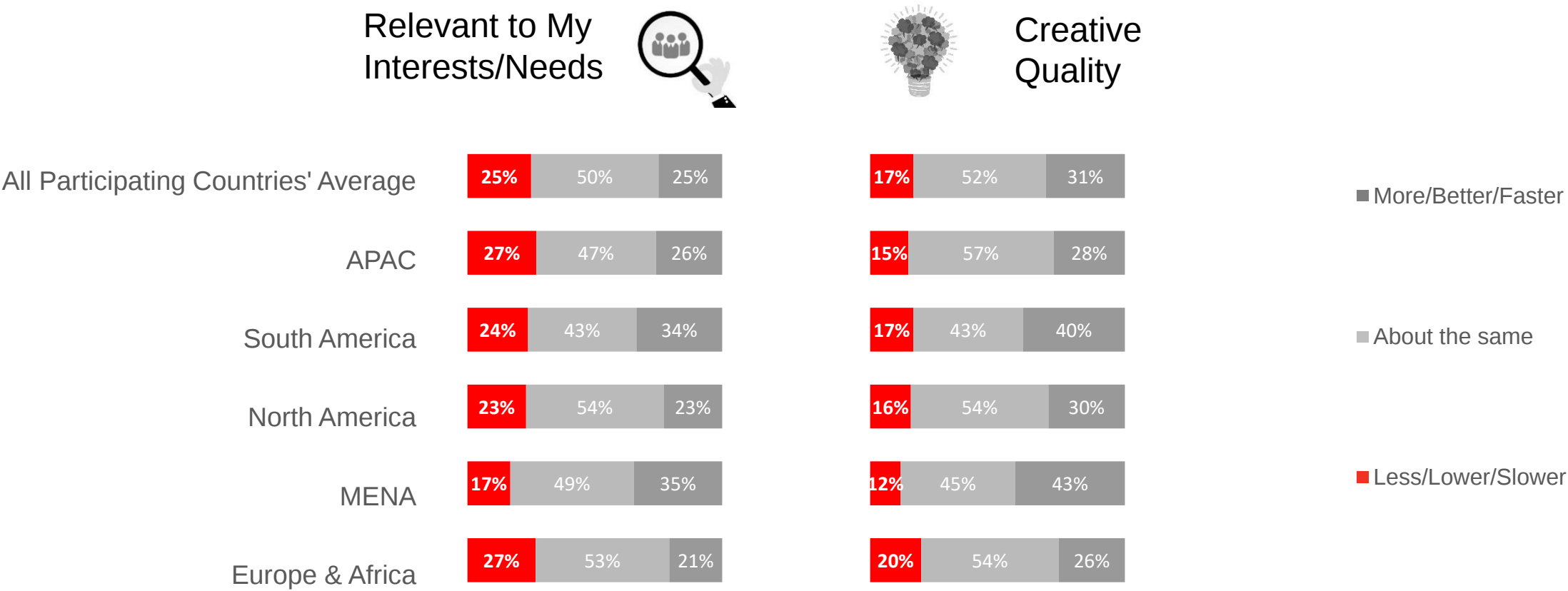
Consumers feel they see about the same amount of advertising in live streaming as in live TV or video, however the nature of the advertising encounter could improve

Q31. Now we'd like you to think about a few aspects of the ads you see when live streaming video. How do you feel about these ads compared to ads you saw on live TV or on-demand digital video?



Overall creative quality and relevance for live streaming ads versus live TV are the same although in MENA, creative quality in live streaming is seen as stronger

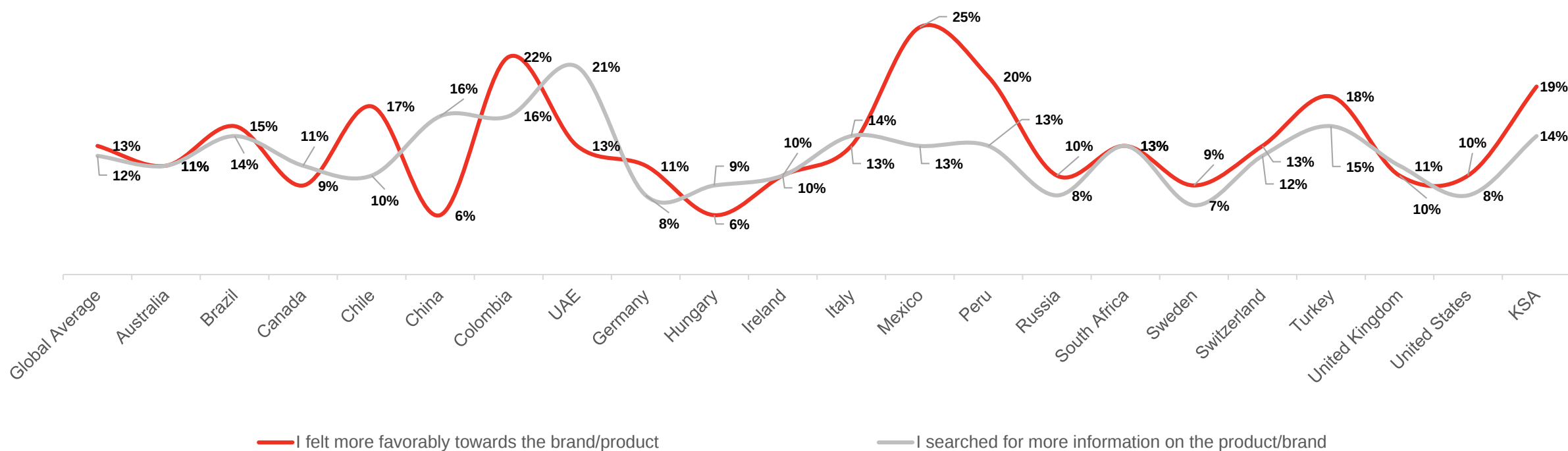
Q31. Now we'd like you to think about a few aspects of the ads you see when live streaming video. How do you feel about these ads compared to ads you saw on live TV or on-demand digital video?



Live streamers in most countries reported improved brand favorability after seeing an ad during a live stream

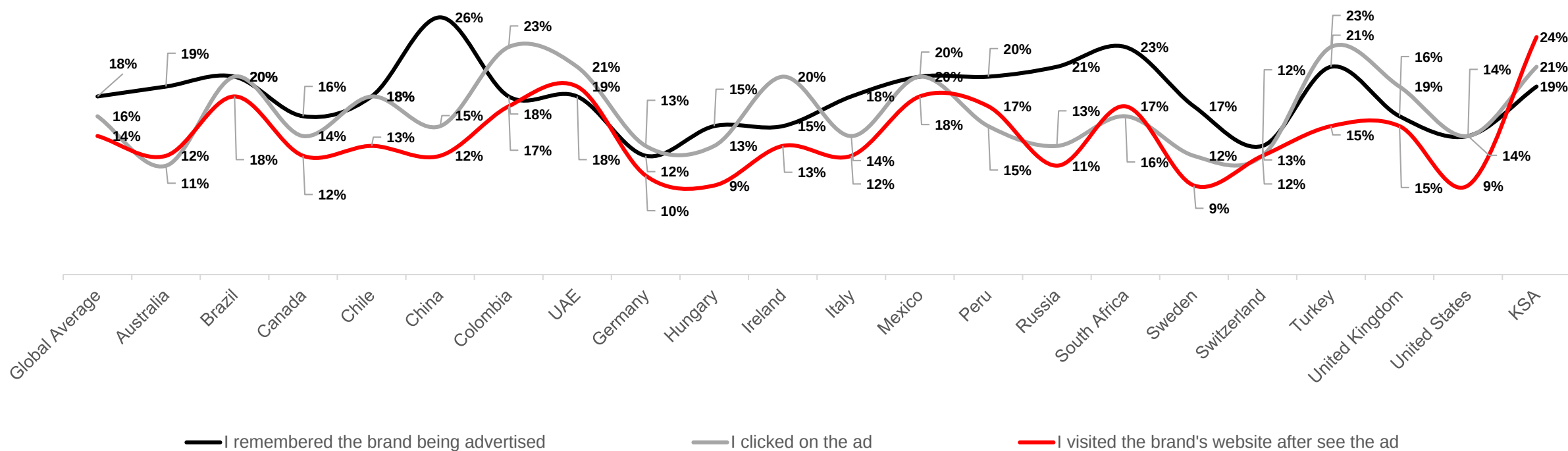
China and United Arab Emirates consumers were more likely to search for more information

Q30. Next we would like you to think about the last ad you saw while live streaming. Which of the following describes what you did?



Seeing an ad during live streaming resulted in ad recall, clickthrough, and site visits in various countries

Q30. Next we would like you to think about the last ad you saw while live streaming. Which of the following describes what you did?



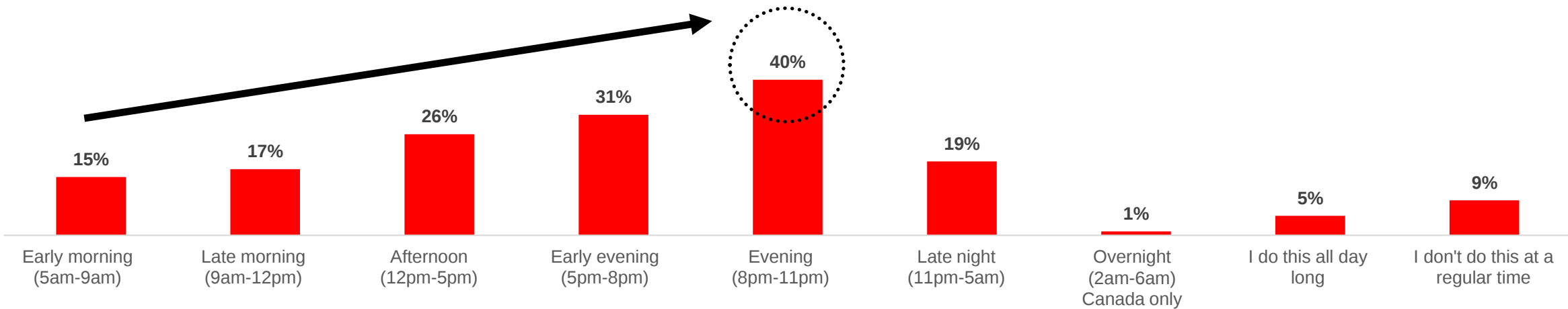
When and Where Live Video Content is Streamed

Live streaming is a daily activity that provokes social interaction

- **Consumption of live video content rises throughout the day, peaking in the evening**
- **73% of live video content is consumed at home. Outdoor consumption appears to accompany journeys and social events.**
- **Group consumption appears to take place – especially on smartphones**
 - Interestingly, 37% of viewers spend 81% or more of their time live streaming in the company of others, this increases to 56% when using a smartphone
- **Live video streaming induces ‘social contact’ – both related to the content being watched and unrelated**
 - Using social networks (both checking and chatting) along with talking to those whom the live streaming experience is being shared with takes place when streaming live video content
 - The topic of this interaction can be both related to, and unrelated to, the content being consumed

Live video content consumption rises throughout the day, peaking in the evening

Q18. What time or times of day do you typically watch live video streaming? Please select all that apply.



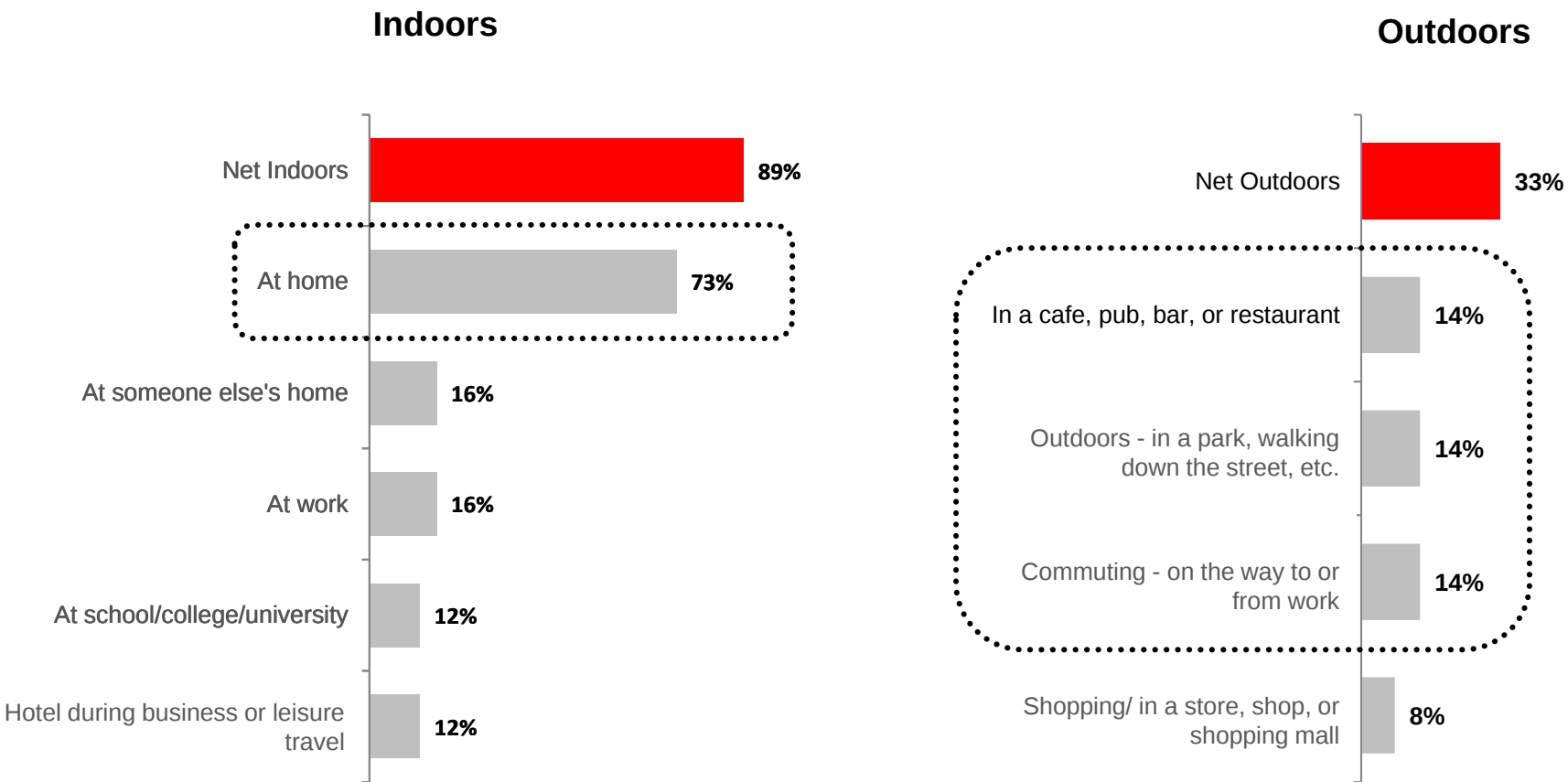
Morning consumption is strongest in Saudi Arabia, while China has the strongest evening usage

Q18. What time or times of day do you typically watch live video streaming? Please select all that apply.

Time Period	Top Market
Early morning (5am-9am)	Colombia, KSA & South Africa: 26%
Late morning (9am-12pm)	UAE & KSA: 26%
Afternoon (12pm-5pm)	Mexico: 33% Turkey: 31%
Early evening (5pm-8pm)	Australia: 41%
Evening (8pm-11pm)	China: 57%
Late night (11pm-5am)	Canada: 31% South Africa: 30%

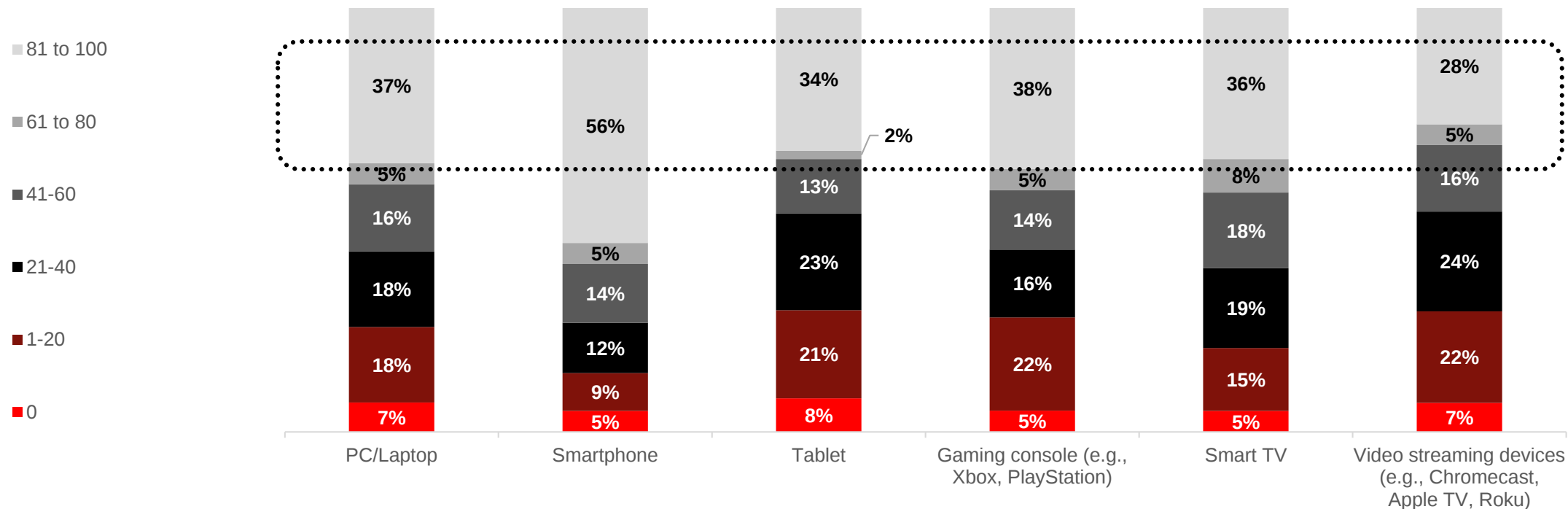
73% of live video content is consumed at home. Outdoor consumption accompanies journeys and social events.

Q19. And typically where are you when you are live streaming content?



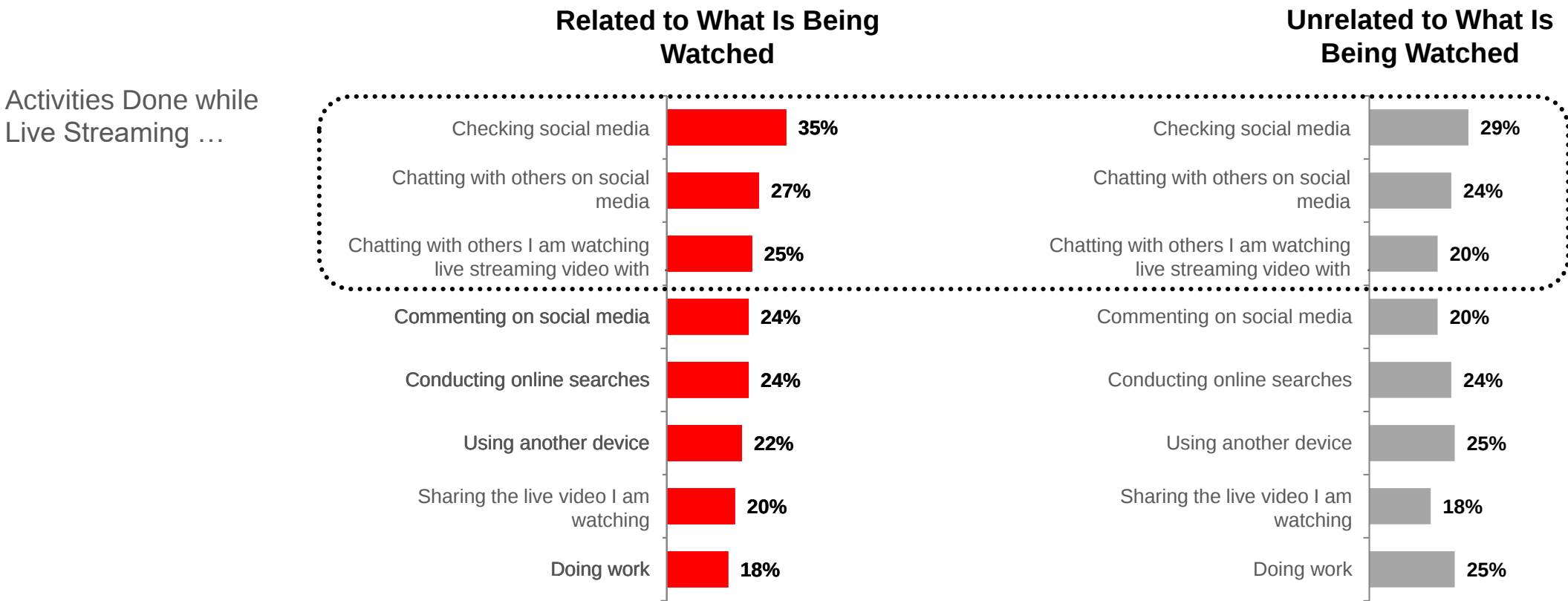
Group consumption appears to take place – especially on smartphones

Q13. On a typical occasion when you are live video streaming, what's the percentage of time you live stream with others (friends, family, colleagues etc) on the following devices? Please enter a number between 0 and 100



Live video streaming induces ‘social contact’ – both related to the content and unrelated

Q20. When you live stream video, which of the following do you typically do at the same time that is related to what you are watching? And **Q21.** And now we'd like you to think about things you do when you live stream video, that are unrelated to what you are watching?



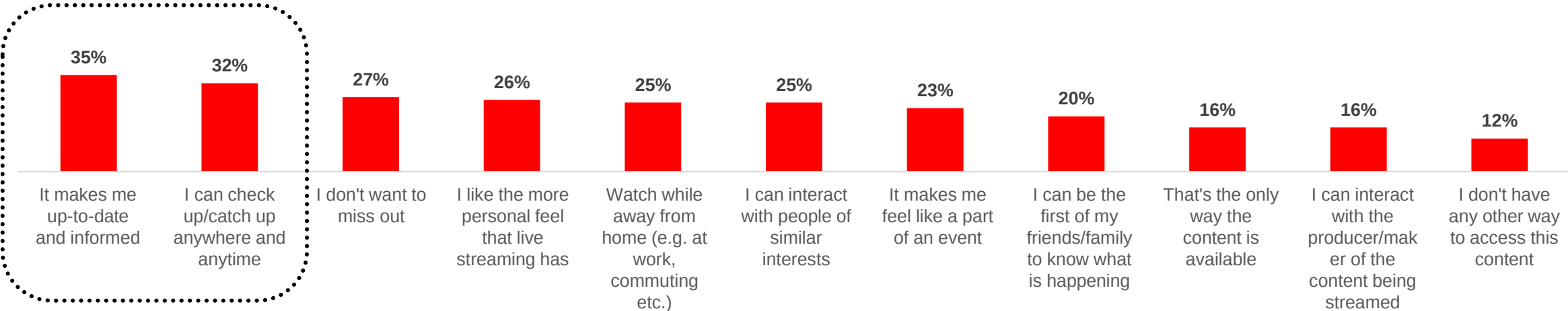
What Motivates Live Streaming

They won't miss out – but you must offer quality (content & connection)!

- **The primary motivation for live streaming video content is the desire and need to stay in tune and up-to-date**
 - Consumers want to be able to check in/catch up when they want, on the move, so that they don't miss out and stay up-to-date. They also enjoy the experience of sharing with others of similar interest
- **But that doesn't mean they will accept anything**
 - While the above motivation drives consumers toward live streamed content, that content must be deemed by them to be high quality – 45% state this as the key influencer when selecting content to live stream
 - Connection stability is also important to consumers – which is why we can assume they choose to spend more time live streaming at home, while also giving them the personal time required to fulfill their need to stay up-to-date
 - Therefore, it would appear that a challenge to encouraging greater screen time (s17) for mobile devices (smartphones/tablets) could lie in the hands of the mobile network operators and carriers. Proving and providing a strong stable connection for live video streaming could encourage and convince consumers to extend screen time.

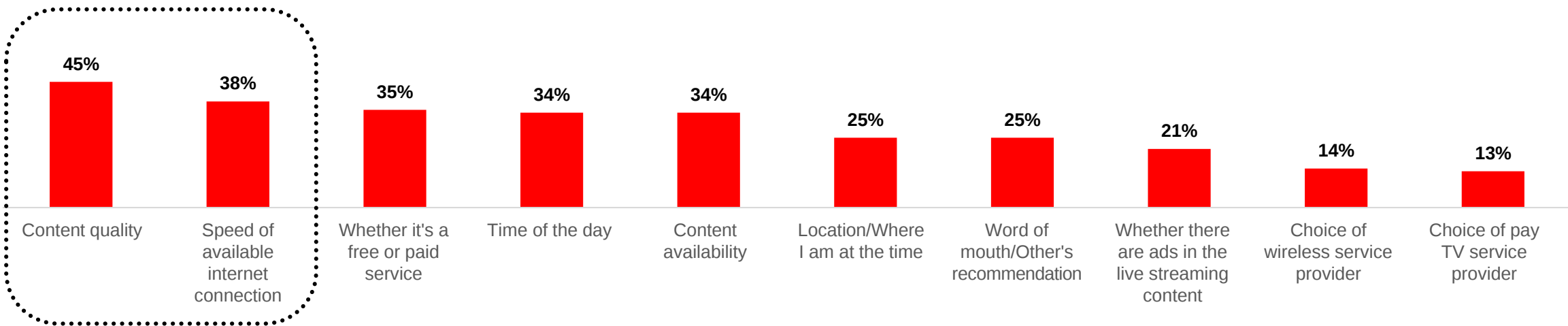
Being up-to-date is the primary motivation for live streaming

Q17. What are the main reasons for you to watch live video streaming content? Please choose as many or as few as you like.



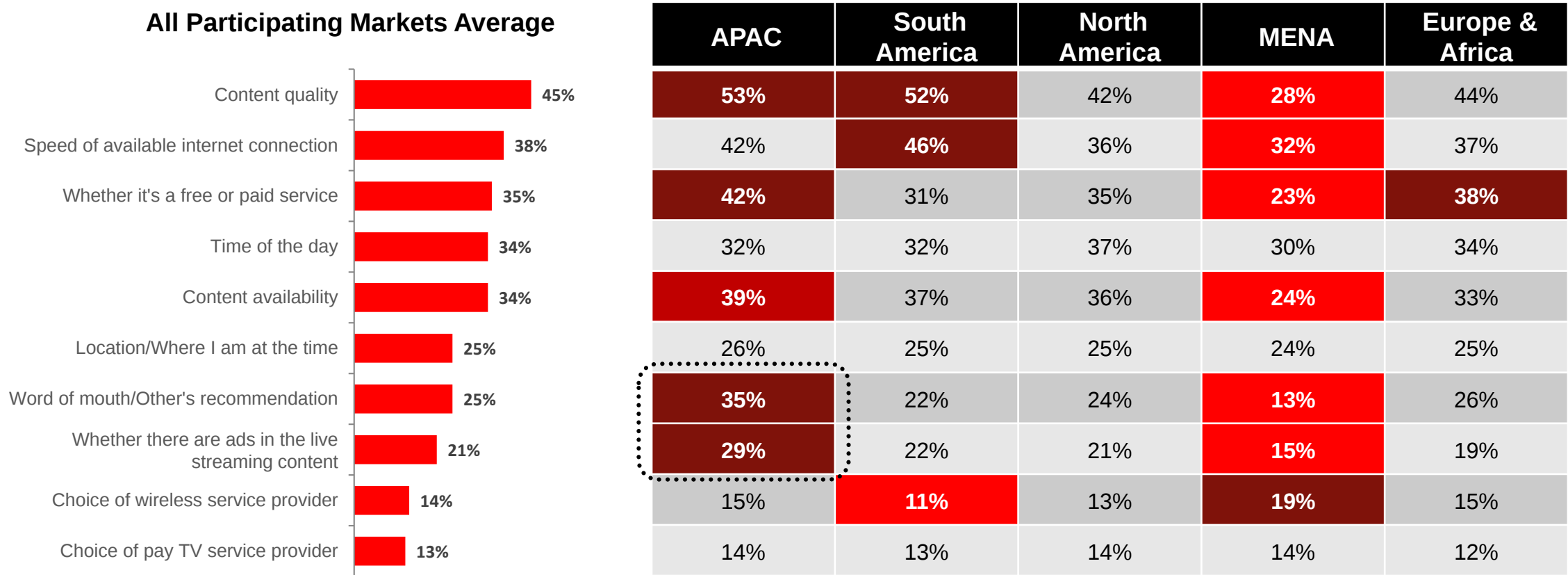
Quality content is the primary influencer in content choice for consumers, followed by speed of connection

Q15. Which of the following factors influence your choice of live video streaming sources? Please select all that apply.



These influences remain key across all territories covered while the influence of word of mouth and ads is especially pronounced in APAC

Q15. Which of the following factors influence your choice of live video streaming sources? Please select all that apply.



Thank you



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Appendix

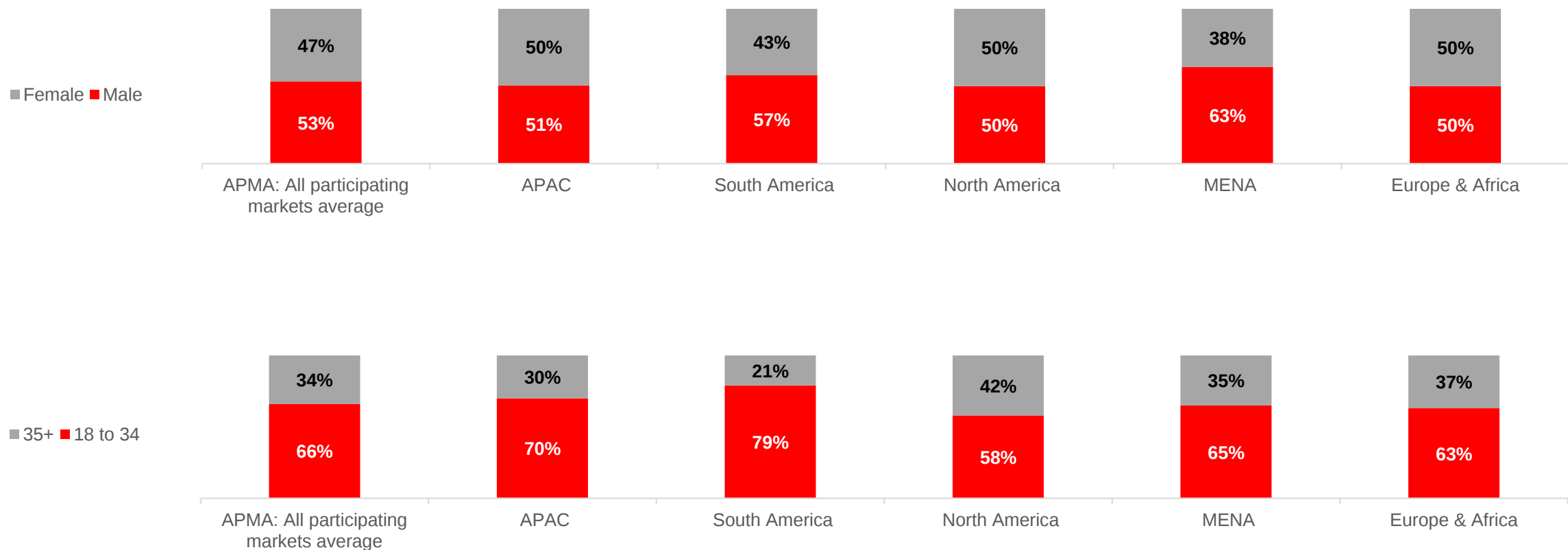
About IAB

The Interactive Advertising Bureau (IAB) empowers the media and marketing industries to thrive in the digital economy. It is comprised of more than 650 leading media and technology companies that are responsible for selling, delivering, and optimizing digital advertising or marketing campaigns. Together, they account for 86 percent of online advertising in the United States.

Working with its member companies, the IAB develops technical standards and best practices and fields critical research on interactive advertising, while also educating brands, agencies, and the wider business community on the importance of digital marketing. The organization is committed to professional development and elevating the knowledge, skills, expertise, and diversity of the workforce across the industry.

Through the work of its public policy office in Washington, D.C., the IAB advocates for its members and promotes the value of the interactive advertising industry to legislators and policymakers. There are licensed IABs in 43 nations around the world and one regional IAB in Europe. Founded in 1996, the IAB is headquartered in New York City and has a West Coast office in San Francisco.

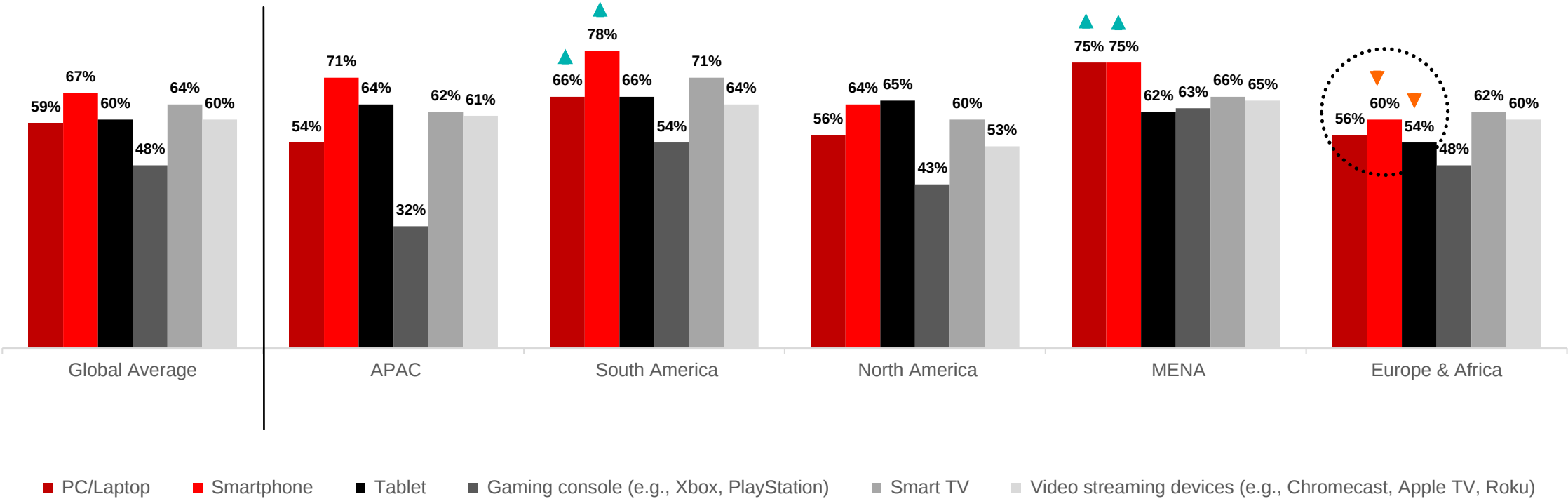
Sample & Methodology: Final Sample Profile



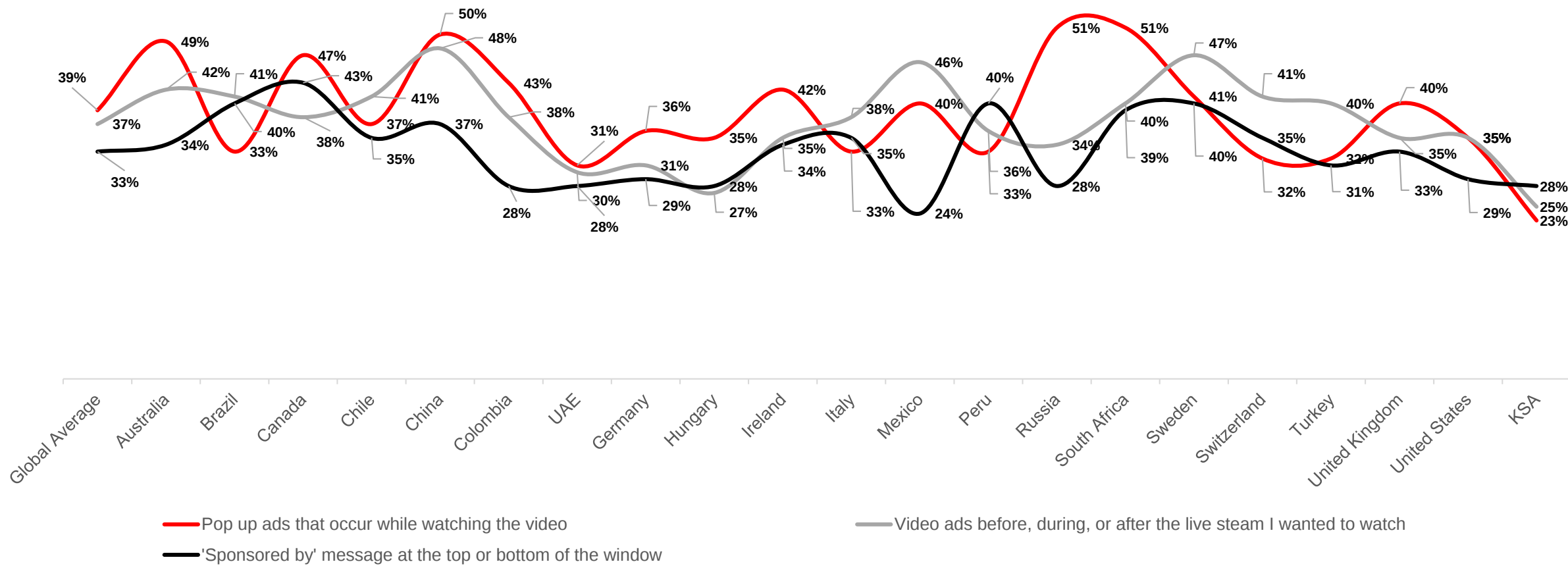
Smartphones are popular across all regions. Interestingly, Europe displays the lowest usage of this device

Q11. And how frequently do you use the following device/s for live video streaming?

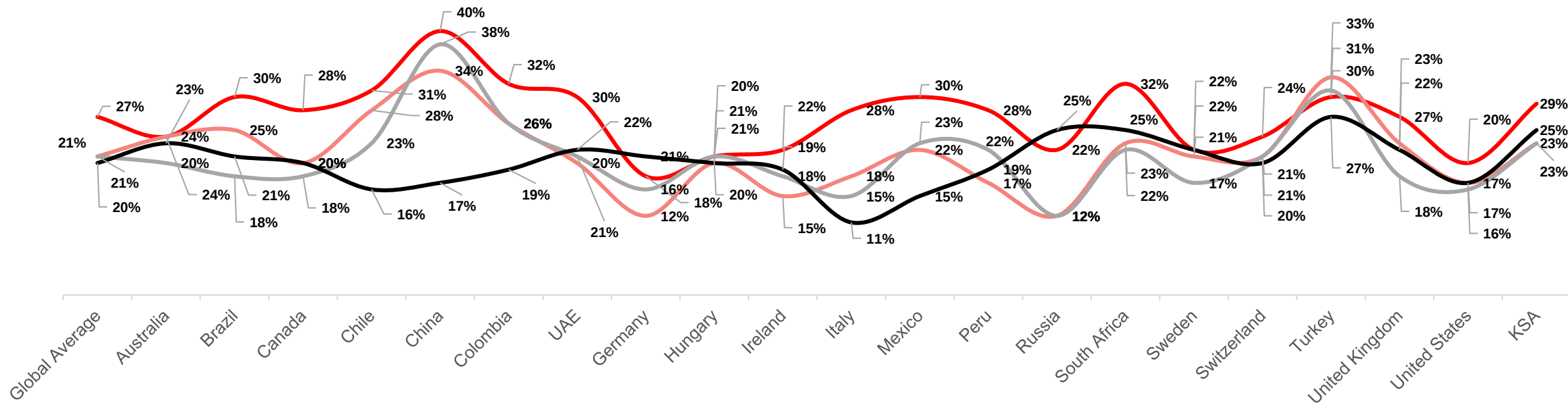
Frequency of Using Devices for Live Video Streaming: Several Times/Once a Day



Q29. Which of the following types of ads have you seen while live streaming



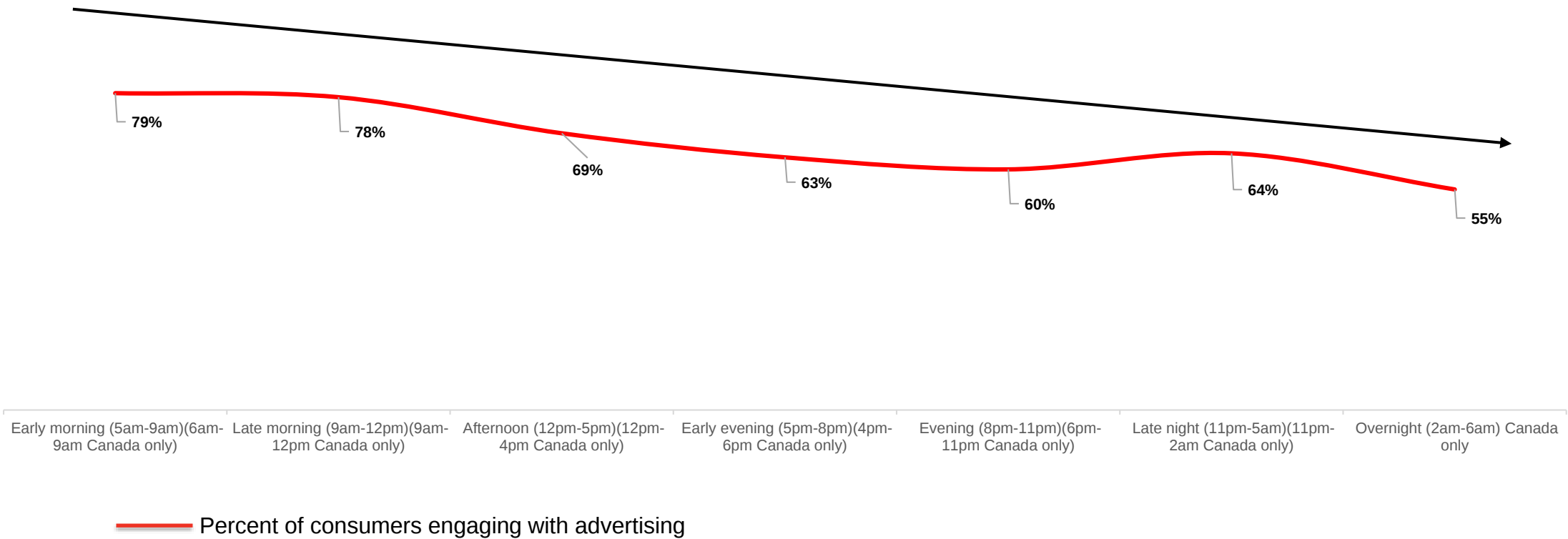
Q29. Which of the following types of ads have you seen while live streaming



— Video ads overlaid on the video window while the video was playing
— Still image overlaid on the video window while the video was playing
— Still image around the video player window
— Some other type of ad

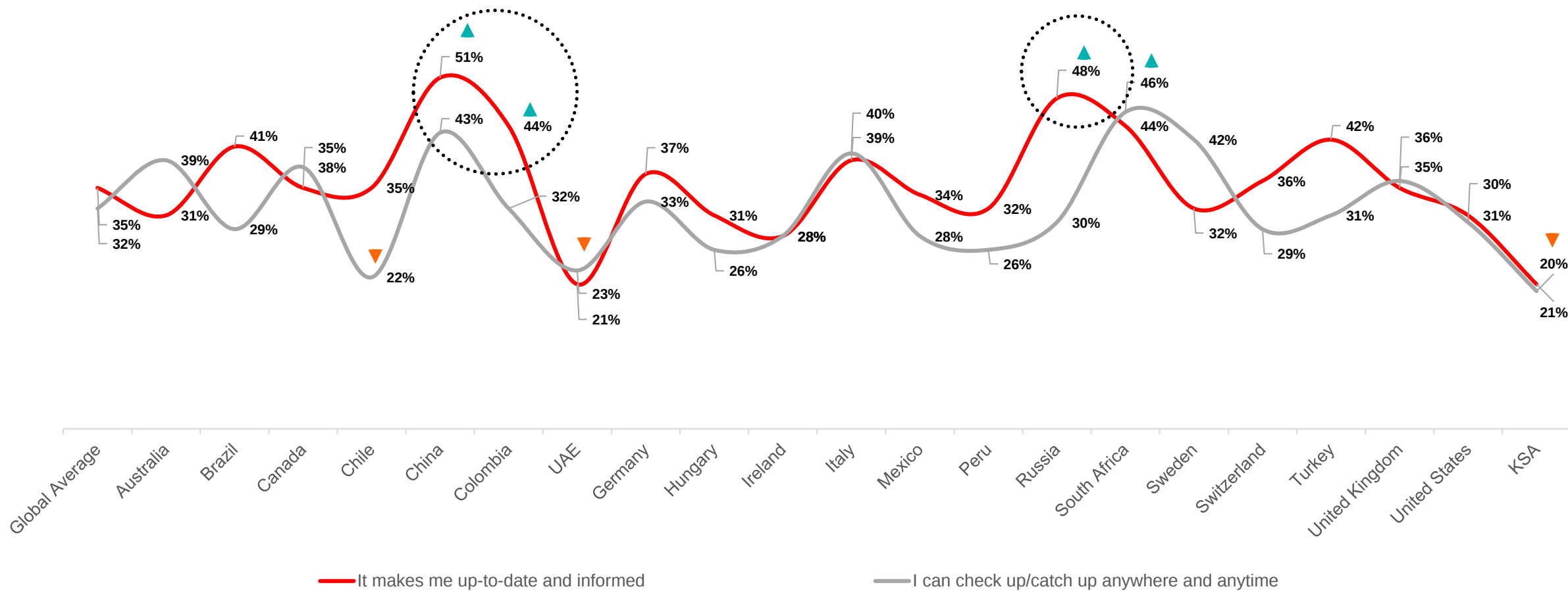
Interestingly, consumer engagement with advertising gets more subdued as the day goes on, no doubt influenced by their engagement with the content they consume at this time

Q30. Next we would like you to think about the last ad you saw while live streaming. Which of the following describes what you did?



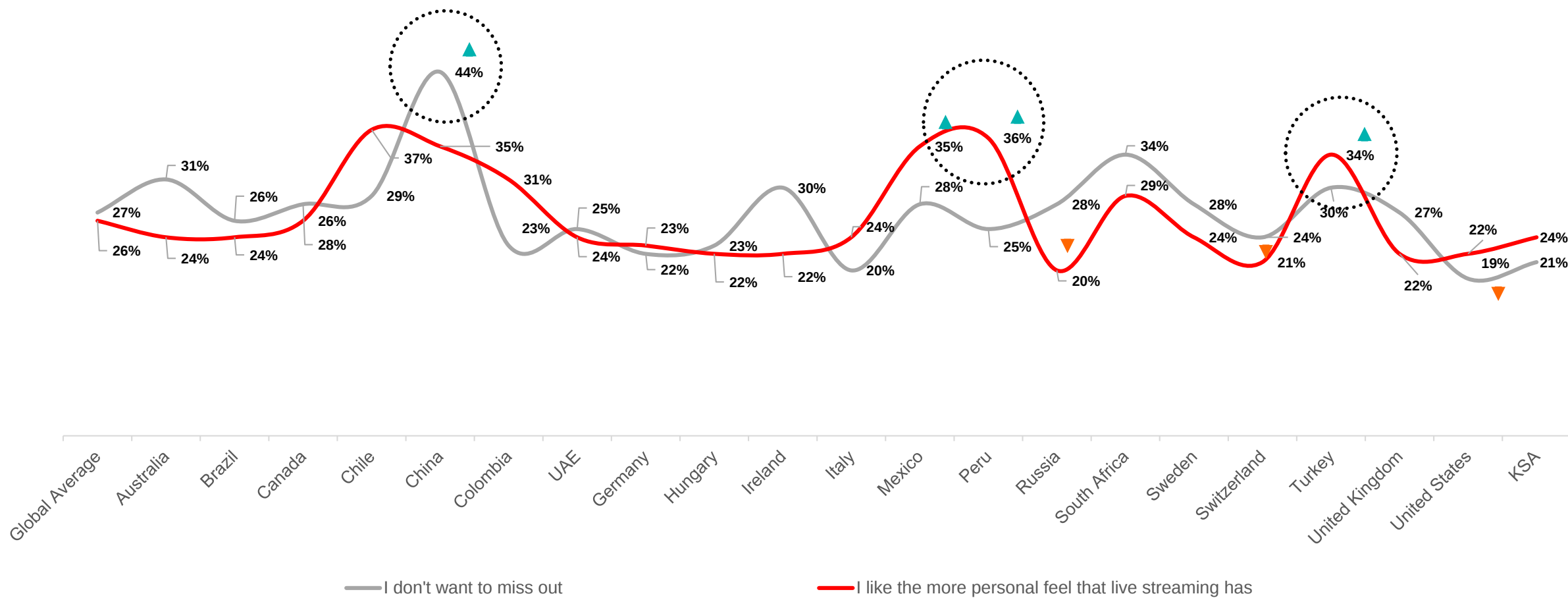
The motivation to live stream to be up-to-date is strongest in China, Colombia, and Russia

Q17. What are the main reasons for you to watch live video streaming content? Please choose as many or as few as you like.



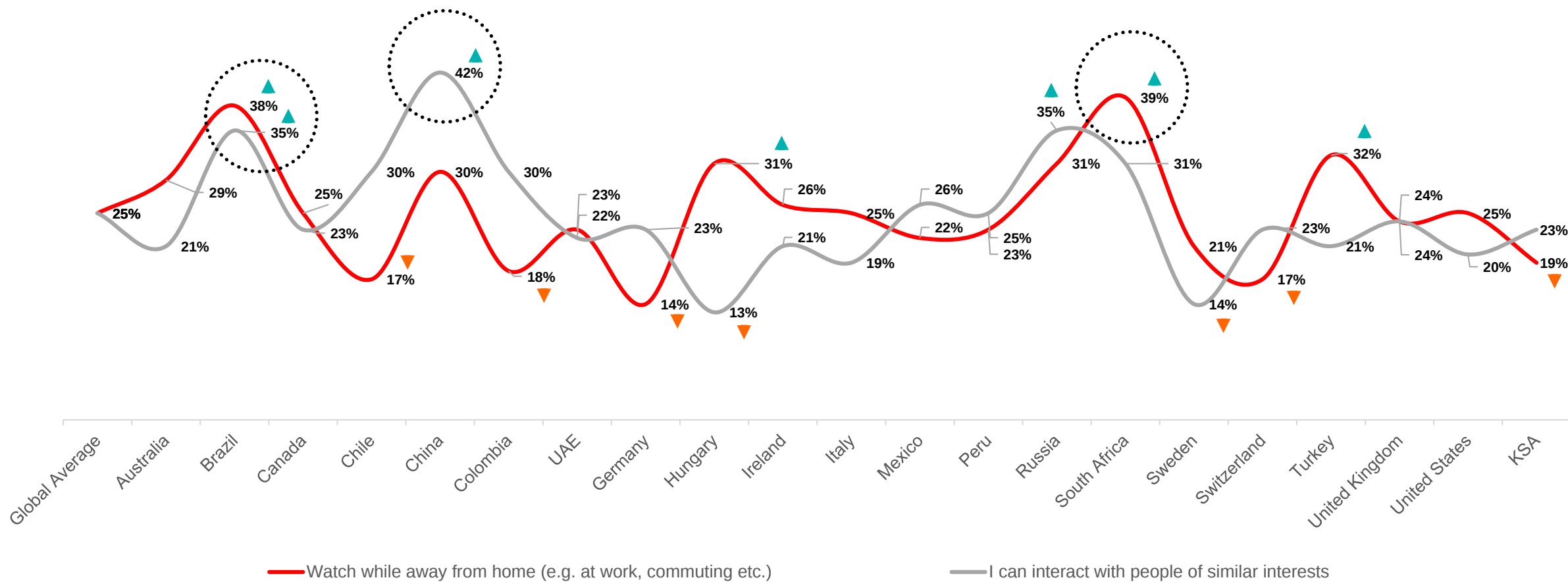
Not missing out is also a key influence in China. Consumers in Mexico, Peru, and Turkey display stronger desire towards the personal nature of live streaming

Q17. What are the main reasons for you to watch live video streaming content? Please choose as many or as few as you like.

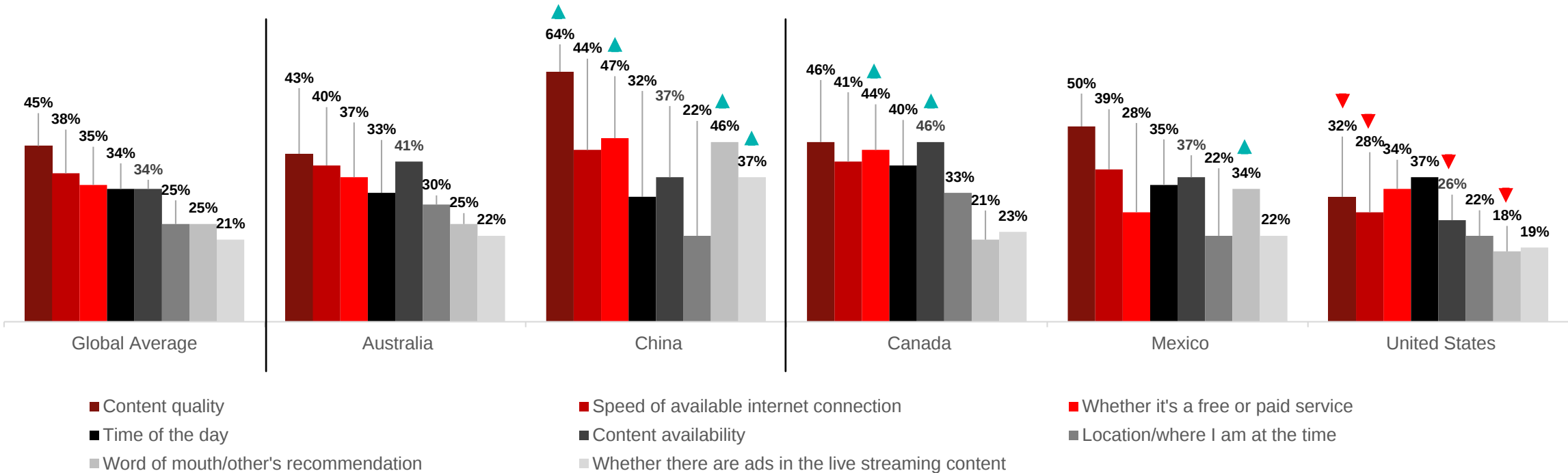


The ability to interact with others is also a strong motivator of live streaming in China. Portable viewing the same in Brazil and South Africa

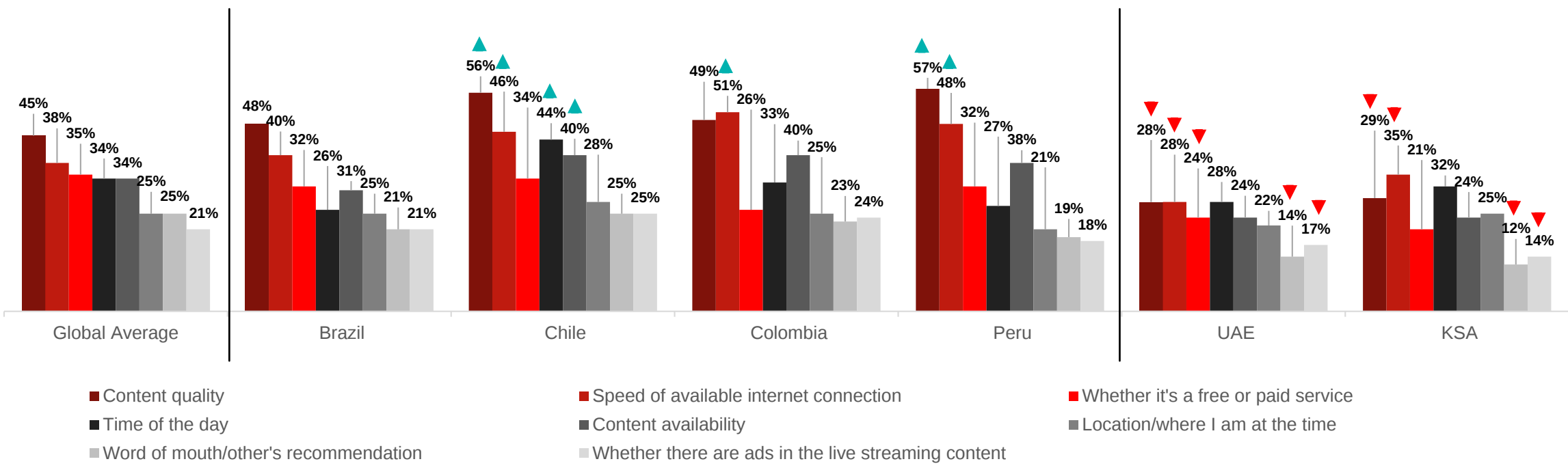
Q17. What are the main reasons for you to watch live video streaming content? Please choose as many or as few as you like.



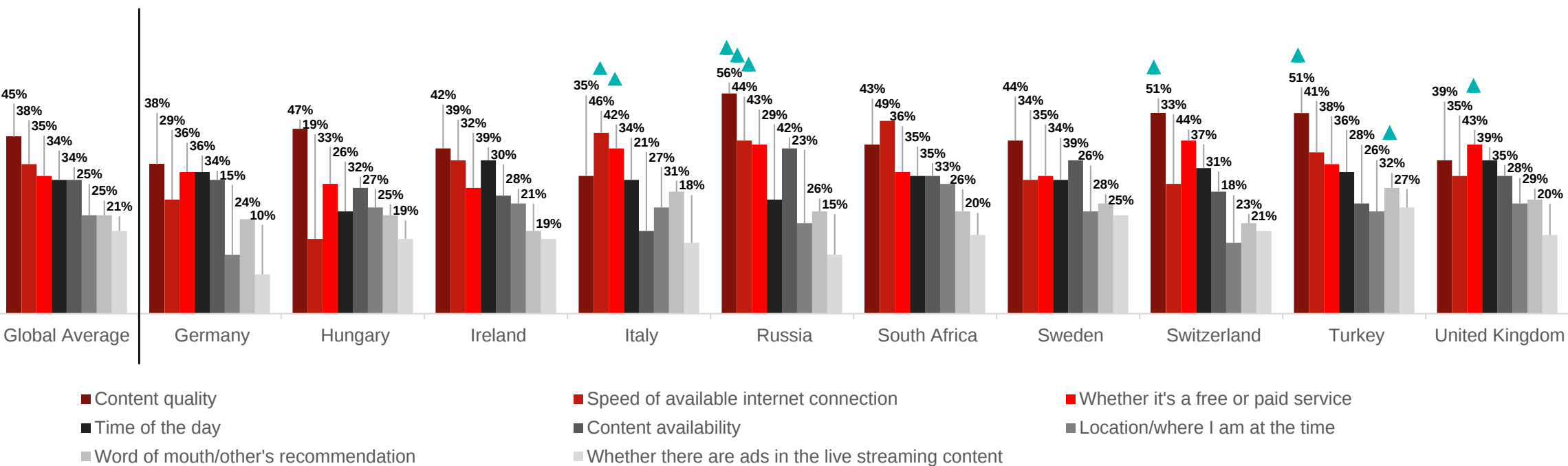
Q15. Which of the following factors influence your choice of live video streaming sources? Please select all that apply



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Questions?



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