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

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.
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.
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?

- **Several times a day**: 9%
- **Once a day**: 11%
- **Weekly**: 5%
- **Monthly**: 4%
- **Less than monthly**: 17%
- **I don’t watch digital video**: 11%

**Global Average**: 53%

**70%**
View video once/several times a day

**Frequency of Video Streaming (Once/Several Times a Day)**

- **North America**: 65%
- **Europe**: 66%
- **APAC**: 66%
- **Global Average**: 70%
- **MENA**: 77%
- **South America**: 80%

**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)**: KSA, UAE
- **SOUTH AMERICA (N=800)**: Brazil, Chile, Colombia, Peru

**MENA and South America have the strongest video usage.**

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.

Base: All respondents reached (12,814)

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

- Global Average: 67%
- APAC: 70%
- South America: 61%
- North America: 67%
- MENA: 90%
- Europe: 66%

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.

Live Video Streaming Incidence by Country

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.

<table>
<thead>
<tr>
<th>Devices Own/Have Access to</th>
<th>Devices Used to View Live Stream Video</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smartphone</td>
<td>83%</td>
</tr>
<tr>
<td>PC/Laptop</td>
<td>62%</td>
</tr>
<tr>
<td>Tablet</td>
<td>49%</td>
</tr>
<tr>
<td>Smart TV</td>
<td>44%</td>
</tr>
<tr>
<td>Gaming console (e.g., Xbox, PlayStation)</td>
<td>38%</td>
</tr>
<tr>
<td>Video streaming devices (e.g., Chromecast, Apple TV, Roku)</td>
<td>23%</td>
</tr>
</tbody>
</table>

| Conversion – Own/Access to Use | | Use |
|-------------------------------|------------------|
| Smartphone                    | 62%              |
| PC/Laptop                     | 37%              |
| Tablet                        | 25%              |
| Smart TV                      | 20%              |
| Gaming console (e.g., Xbox, PlayStation) | 11% |
| Video streaming devices (e.g., Chromecast, Apple TV, Roku) | 10% |

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

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

**Frequency of Using Devices for Live Video Streaming**

(Several Times/Once a Day)

Global Average

<table>
<thead>
<tr>
<th>Device Type</th>
<th>Several times a day</th>
<th>Once a day</th>
</tr>
</thead>
<tbody>
<tr>
<td>PC/Laptop</td>
<td>59%</td>
<td>25%</td>
</tr>
<tr>
<td>Smartphone</td>
<td>67%</td>
<td>21%</td>
</tr>
<tr>
<td>Tablet</td>
<td>60%</td>
<td>26%</td>
</tr>
<tr>
<td>Gaming console (e.g., Xbox, PlayStation)</td>
<td>48%</td>
<td>22%</td>
</tr>
<tr>
<td>Smart TV</td>
<td>64%</td>
<td>30%</td>
</tr>
<tr>
<td>Video streaming devices (e.g., Chromecast, Apple TV, Roku)</td>
<td>60%</td>
<td>29%</td>
</tr>
</tbody>
</table>

Base: Use device Total (1562/2606/1040/449/856/416)

△ ▼ Significantly higher/lower. Tested at 95% confidence interval.
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)

<table>
<thead>
<tr>
<th>Device</th>
<th>% Who Typically Live Stream on this Device for Over 30 Min.</th>
</tr>
</thead>
<tbody>
<tr>
<td>PC/Laptop</td>
<td>57%</td>
</tr>
<tr>
<td>Smartphone</td>
<td>47%</td>
</tr>
<tr>
<td>Tablet</td>
<td>52%</td>
</tr>
<tr>
<td>Gaming console (e.g., Xbox, PlayStation)</td>
<td>60%</td>
</tr>
<tr>
<td>Smart TV</td>
<td>67%</td>
</tr>
<tr>
<td>Video streaming devices (e.g., Chromecast, Apple TV, Roku)</td>
<td>62%</td>
</tr>
</tbody>
</table>

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

Base: Use device: Total (1562/2606/1040/449/856/416)
Significantly higher/lower. Tested at 95% confidence interval.
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

Base: Use device: Total (1562/2606/1040/449/856/416)
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?

Base: Use device: Total (1562/2606/1040/449/856/416) | Significantly higher/lower. Tested at 95% confidence interval.
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
Q14. Which of the following sources do you live stream video content from? Please select all that apply.

### Sources of Live Video Stream

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social platforms (Snapchat Stories, Instagram Stories, Facebook Live, Twitter, etc.)</td>
<td>52%</td>
</tr>
<tr>
<td>Digital streaming subscription (Hulu Live, YouTube Live, DirectTV Now, Sling TV, PlayStation Vue, etc.)</td>
<td>41%</td>
</tr>
<tr>
<td>TV network website or app (e.g., ITV Hub, All4, BT Sport)</td>
<td>34%</td>
</tr>
<tr>
<td>Gaming website or app</td>
<td>33%</td>
</tr>
<tr>
<td>My pay TV service provider website or app</td>
<td>21%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
</tr>
</tbody>
</table>

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

Base: All respondents (4200), APAC (400), South America (800), North America (600), MENA (400), Europe (2000)
Q14. Which of the following sources do you live stream video content from? Please select all that apply.

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

- Social platforms (Snapchat Stories, Instagram Stories, Facebook Live, Twitter, etc.)
- Digital streaming subscription (Hulu Live, YouTube Live, DirectTV Now, Sling TV, PlayStation Vue, etc.)
- TV network website or app (e.g., ITV Hub, All4, BT Sport)
- Gaming website or app
- My pay TV service provider website or app
- Other

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

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

<table>
<thead>
<tr>
<th>Source</th>
<th>Total</th>
<th>Australia</th>
<th>China</th>
<th>Canada</th>
<th>Mexico</th>
<th>United States</th>
<th>UAE</th>
<th>KSA</th>
<th>Brazil</th>
<th>Chile</th>
<th>Colombia</th>
<th>Peru</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social platforms</td>
<td>52%</td>
<td>41%</td>
<td>59%</td>
<td>51%</td>
<td>53%</td>
<td>46%</td>
<td>62%</td>
<td>59%</td>
<td>40%</td>
<td>43%</td>
<td>62%</td>
<td>58%</td>
</tr>
<tr>
<td>Digital streaming subscription</td>
<td>62%</td>
<td>47%</td>
<td>33%</td>
<td>36%</td>
<td>37%</td>
<td>33%</td>
<td>44%</td>
<td>44%</td>
<td>33%</td>
<td>19%</td>
<td>33%</td>
<td>33%</td>
</tr>
<tr>
<td>TV network website or app</td>
<td>44%</td>
<td>50%</td>
<td>23%</td>
<td>19%</td>
<td>26%</td>
<td>29%</td>
<td>33%</td>
<td>19%</td>
<td>19%</td>
<td>23%</td>
<td>26%</td>
<td>25%</td>
</tr>
<tr>
<td>Gaming website or app</td>
<td>45%</td>
<td>45%</td>
<td>47%</td>
<td>42%</td>
<td>40%</td>
<td>27%</td>
<td>41%</td>
<td>11%</td>
<td>33%</td>
<td>37%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>My pay TV service provider website or app</td>
<td>28%</td>
<td>28%</td>
<td>18%</td>
<td>17%</td>
<td>28%</td>
<td>24%</td>
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<td>23%</td>
<td>23%</td>
</tr>
</tbody>
</table>

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

Typical Content Types Live Streamed

- TV series/episodes: 45%
- Sporting games/matches: 31%
- Tutorial or how-to video: 30%
- Gaming sessions/eSports (e.g., video game competitions): 29%
- Video by friends or family: 28%
- News: 27%
- Video by online celebrity/influencer: 24%
- Concerts: 23%
- Talk shows: 22%

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

<table>
<thead>
<tr>
<th>Type of Content</th>
<th>Global Average</th>
<th>APAC</th>
<th>South America</th>
<th>North America</th>
<th>MENA</th>
<th>Europe</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV series/episodes</td>
<td>45%</td>
<td>52%</td>
<td>52%</td>
<td>47%</td>
<td>28%</td>
<td>44%</td>
</tr>
<tr>
<td>Sporting games/matches</td>
<td>31%</td>
<td>28%</td>
<td>38%</td>
<td>27%</td>
<td>25%</td>
<td>32%</td>
</tr>
<tr>
<td>Tutorial or how-to video</td>
<td>30%</td>
<td>33%</td>
<td>43%</td>
<td>30%</td>
<td>19%</td>
<td>27%</td>
</tr>
<tr>
<td>Gaming sessions/eSports (e.g., video game competitions)</td>
<td>29%</td>
<td>40%</td>
<td>28%</td>
<td>27%</td>
<td>18%</td>
<td>30%</td>
</tr>
<tr>
<td>Video by friends or family</td>
<td>28%</td>
<td>28%</td>
<td>29%</td>
<td>30%</td>
<td>32%</td>
<td>27%</td>
</tr>
<tr>
<td>News</td>
<td>27%</td>
<td>25%</td>
<td>28%</td>
<td>27%</td>
<td>26%</td>
<td>27%</td>
</tr>
<tr>
<td>Video by online celebrity/influencer</td>
<td>24%</td>
<td>30%</td>
<td>31%</td>
<td>23%</td>
<td>21%</td>
<td>22%</td>
</tr>
<tr>
<td>Concerts</td>
<td>23%</td>
<td>23%</td>
<td>28%</td>
<td>26%</td>
<td>18%</td>
<td>22%</td>
</tr>
<tr>
<td>Talk shows</td>
<td>22%</td>
<td>31%</td>
<td>22%</td>
<td>19%</td>
<td>20%</td>
<td>22%</td>
</tr>
</tbody>
</table>

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.
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.

- TV series/episodes
- Sporting games/matches
- Tutorial or how-to video
- Gaming sessions/eSports (e.g., video game competitions)
- Video by friends or family
- Concerts
- News
- Talk shows

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.
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 devices 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 forthcoming 2018 FIFA World Cup in Russia how likely are you to…

Watch 2018 FIFA World Cup as…

- Extremely/Probably Likely
  - Extremely likely: 71% (42%), 65% (32%), 53% (24%), 52% (23%)
  - Probably likely: 29%, 33%, 29%, 29%

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.
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 forthcoming 2018 FIFA World Cup in Russia how likely are you to...

- To watch live matches on TV, global average
- To watch live streaming matches online, global average

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.
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…

- To watch recorded matches on TV
- To watch recorded matches online

<table>
<thead>
<tr>
<th>Country</th>
<th>Above Global Average</th>
<th>Below Global Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>72%</td>
<td>52%</td>
</tr>
<tr>
<td>KSA</td>
<td>67%</td>
<td>52%</td>
</tr>
<tr>
<td>Russia</td>
<td>69%</td>
<td>48%</td>
</tr>
<tr>
<td>UAE</td>
<td>68%</td>
<td>46%</td>
</tr>
<tr>
<td>United States</td>
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</tr>
<tr>
<td>Mexico</td>
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<td>44%</td>
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<tr>
<td>United Kingdom</td>
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<td>Australia</td>
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<td>South Africa</td>
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<tr>
<td>Brazil</td>
<td>58%</td>
<td>35%</td>
</tr>
<tr>
<td>Ireland</td>
<td>62%</td>
<td>34%</td>
</tr>
<tr>
<td>Germany</td>
<td>52%</td>
<td>39%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>48%</td>
<td>35%</td>
</tr>
<tr>
<td>Peru</td>
<td>48%</td>
<td>34%</td>
</tr>
<tr>
<td>Chile</td>
<td>46%</td>
<td>35%</td>
</tr>
<tr>
<td>Turkey</td>
<td>46%</td>
<td>34%</td>
</tr>
<tr>
<td>Sweden</td>
<td>45%</td>
<td>35%</td>
</tr>
<tr>
<td>Italy</td>
<td>45%</td>
<td>35%</td>
</tr>
<tr>
<td>Hungary</td>
<td>44%</td>
<td>34%</td>
</tr>
</tbody>
</table>

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.
Q25. Thinking about the forthcoming 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?

<table>
<thead>
<tr>
<th>Device</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV</td>
<td>39%</td>
</tr>
<tr>
<td>Smartphone</td>
<td>36%</td>
</tr>
<tr>
<td>Smart TV</td>
<td>29%</td>
</tr>
<tr>
<td>PC/Laptop</td>
<td>26%</td>
</tr>
<tr>
<td>Tablet</td>
<td>21%</td>
</tr>
<tr>
<td>Video streaming devices (e.g., Chromecast, Apple TV, Roku)</td>
<td>11%</td>
</tr>
<tr>
<td>Feature phone</td>
<td>9%</td>
</tr>
<tr>
<td>Gaming console (e.g., Xbox, PlayStation)</td>
<td>9%</td>
</tr>
<tr>
<td>Radio/Digital Audio Broadcast (DAB)</td>
<td>8%</td>
</tr>
<tr>
<td>I don't plan to watch/follow the 2018 FIFA World Cup</td>
<td>14%</td>
</tr>
</tbody>
</table>

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

Q25. Thinking about the forthcoming 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?

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.
Subscriptions and Advertising
More than half of consumers globally pay for internet service

» Roughly one-third pay for TV or subscription video services
  - Consumers in Hungary and Russia are much more likely to pay for TV
  - China, Sweden and UK consumers are more likely to pay for video services

» One-quarter pay for streaming music or gaming
  - Consumers in Ireland are more likely to pay for gaming services and in Sweden to pay for streaming music services

» 17% pay for a live streaming video service
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)

<table>
<thead>
<tr>
<th>Service</th>
<th>% Paying</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home internet</td>
<td>56%</td>
</tr>
<tr>
<td>Pay TV via cable, satellite, or telco TV</td>
<td>36%</td>
</tr>
<tr>
<td>Streaming video service with on-demand/pre-recorded content (Netflix, Amazon Prime, etc.)</td>
<td>33%</td>
</tr>
<tr>
<td>Streaming music service (e.g. Spotify, Pandora, etc.)</td>
<td>25%</td>
</tr>
<tr>
<td>Gaming service (e.g. Xbox Live, PlayStation Network, EA Access, etc.)</td>
<td>25%</td>
</tr>
<tr>
<td>Live streaming video service</td>
<td>17%</td>
</tr>
</tbody>
</table>

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.
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?

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 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
  - Pop ups, pre-roll, and sponsored-by ad units are the ads most visible to consumers

- 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

<table>
<thead>
<tr>
<th>Region</th>
<th>Pay for Individual Live Video</th>
<th>Pay a Subscription Fee</th>
<th>Watch Free Ad-Supported Live Streaming</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global Average</td>
<td>18%</td>
<td>27%</td>
<td>52%</td>
</tr>
<tr>
<td>APAC</td>
<td>11%</td>
<td>30%</td>
<td>38%</td>
</tr>
<tr>
<td>South America</td>
<td>16%</td>
<td>30%</td>
<td>59%</td>
</tr>
<tr>
<td>North America</td>
<td>16%</td>
<td>30%</td>
<td>54%</td>
</tr>
<tr>
<td>MENA</td>
<td>36%</td>
<td>33%</td>
<td>31%</td>
</tr>
<tr>
<td>Europe &amp; Africa</td>
<td>16%</td>
<td>28%</td>
<td>55%</td>
</tr>
</tbody>
</table>

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.
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:

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

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.
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:

<table>
<thead>
<tr>
<th>Platform</th>
<th>Today</th>
<th>A couple of days ago</th>
<th>Last week</th>
<th>A few weeks ago</th>
<th>More than a month ago</th>
<th>Not sure/Don't remember</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV network website or app</td>
<td>39%</td>
<td>14%</td>
<td>14%</td>
<td>6%</td>
<td>4%</td>
<td>8%</td>
</tr>
<tr>
<td>My pay TV service provider website or app</td>
<td>35%</td>
<td>14%</td>
<td>14%</td>
<td>7%</td>
<td>4%</td>
<td>10%</td>
</tr>
<tr>
<td>Social platforms</td>
<td>47%</td>
<td>27%</td>
<td>12%</td>
<td>11%</td>
<td>5%</td>
<td>2%</td>
</tr>
<tr>
<td>Gaming website or app</td>
<td>45%</td>
<td>26%</td>
<td>12%</td>
<td>9%</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>Digital streaming subscription</td>
<td>40%</td>
<td>28%</td>
<td>12%</td>
<td>6%</td>
<td>6%</td>
<td>9%</td>
</tr>
</tbody>
</table>

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

- 39% of respondents globally say they 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?

| Type of Ad                                                                 | Frequency
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Pop up ads that occur while watching the video</td>
<td>39%</td>
</tr>
<tr>
<td>Video ads before, during, or after the live stream I wanted to watch</td>
<td>37%</td>
</tr>
<tr>
<td>'Sponsored by' message at the top or bottom of the window</td>
<td>33%</td>
</tr>
<tr>
<td>Video ads overlaid on the video window while the video was playing</td>
<td>27%</td>
</tr>
<tr>
<td>Still image overlaid on the video window while the video was playing</td>
<td>21%</td>
</tr>
<tr>
<td>Still image around the video player window</td>
<td>21%</td>
</tr>
<tr>
<td>Some other type of ad</td>
<td>20%</td>
</tr>
</tbody>
</table>

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

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

- 64% took action after seeing an ad during a live video stream
- 18% I remembered the brand
- 16% I clicked on the ad
- 14% I visited the brand's website
- 13% I felt more favorably towards the brand/product
- 12% I searched for more information on the product/brand
- 11% I recommended the brand/product
- 11% I talked to others about the ad/product/brand

Any action

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.
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?

**Any action**

- **APAC**: 57%
- **South America**: 71%
- **North America**: 62%
- **MENA**: 89%
- **Europe & Africa**: 59%

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.
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?
Most consumers feel they see about the same amount of advertising in live streaming as in live TV or video and it’s at the same level of intrusiveness.

- However, more say livestreaming ads are more intrusive (30%) than say they’re less intrusive (21%).
- Livestreamers in MENA are more likely to say they see more ads (44%) than on TV or video and that it’s more intrusive (40%).

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?

<table>
<thead>
<tr>
<th>Amount of Ads</th>
<th>Intrusiveness of Ads</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Less</td>
</tr>
<tr>
<td>Global Average</td>
<td>33%</td>
</tr>
<tr>
<td>APAC</td>
<td>32%</td>
</tr>
<tr>
<td>South America</td>
<td>39%</td>
</tr>
<tr>
<td>North America</td>
<td>35%</td>
</tr>
<tr>
<td>MENA</td>
<td>24%</td>
</tr>
<tr>
<td>Europe &amp; Africa</td>
<td>33%</td>
</tr>
</tbody>
</table>

Intrusiveness:
- Less (See less ads, Less intrusive)
- Same (See the same number of ads, Same level of intrusiveness)
- More (See more ads, More intrusive)

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.
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?

The majority of live streamers see overall creative quality and relevance to be equal to TV or ‘regular’ video

- More say livestreaming ads have better creative quality (31%) than say they’re lower in creative quality (17%)
- Live streamers in MENA and S. America are more likely to view livestreaming creative quality as better and more relevant than TV or video

Although in MENA, creative quality in live streaming is seen as stronger.

<table>
<thead>
<tr>
<th>Relevant to My Interests/Needs</th>
<th>Creative Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Participating Countries' Average</td>
<td>25% 50% 25%</td>
</tr>
<tr>
<td>APAC</td>
<td>27% 47% 26%</td>
</tr>
<tr>
<td>South America</td>
<td>24% 43% 34%</td>
</tr>
<tr>
<td>North America</td>
<td>23% 54% 23%</td>
</tr>
<tr>
<td>MENA</td>
<td>17% 49% 35%</td>
</tr>
<tr>
<td>Europe &amp; Africa</td>
<td>27% 53% 21%</td>
</tr>
</tbody>
</table>

Compared to TV or Video, Livestreaming Ads are...

- More
  (More relevant, Better creative quality)
- Same
  (Same level of relevance, Same level of creative quality)
- Less
  (Less relevant, Lower creative quality)

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 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?

I felt more favorably towards the brand/product
I searched for more information on the product/brand

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.
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?

- I remembered the brand being advertised
- I clicked on the ad
- I visited the brand's website after seeing the ad

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.
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 livestreaming is popular, 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 inspires ‘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
Q18. What time or times of day do you typically watch live video streaming? Please select all that apply.

- Early morning (5am-9am) 15%
- Late morning (9am-12pm) 17%
- Afternoon (12pm-5pm) 26%
- Early evening (5pm-8pm) 31%
- Evening (8pm-11pm) 40%
- Late night (11pm-5am) 19%
- Overnight (2am-6am) Canada only 1%
- I do this all day long 5%
- I don't do this at a regular time 9%

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

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

Significantly higher/lower. Tested at 95% confidence interval.
Q18. What time or times of day do you typically watch live video streaming? Please select all that apply.

<table>
<thead>
<tr>
<th>Time Period</th>
<th>Top Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Early morning (5am-9am)</td>
<td>Colombia, KSA &amp; South Africa: 26%</td>
</tr>
<tr>
<td>Late morning (9am-12pm)</td>
<td>UAE &amp; KSA: 26%</td>
</tr>
<tr>
<td>Afternoon (12pm-5pm)</td>
<td>Mexico: 33%</td>
</tr>
<tr>
<td></td>
<td>Turkey: 31%</td>
</tr>
<tr>
<td>Early evening (5pm-8pm)</td>
<td>Australia: 41%</td>
</tr>
<tr>
<td>Evening (8pm-11pm)</td>
<td>China: 57%</td>
</tr>
<tr>
<td>Late night (11pm-5am)</td>
<td>Canada: 31%</td>
</tr>
<tr>
<td></td>
<td>South Africa: 30%</td>
</tr>
</tbody>
</table>
73% of live video content is consumed at home. Outdoor consumption accompanies transit and social events.

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

Indoors

- At home: 73%
- At someone else's home: 16%
- At work: 16%
- At school/college/university: 12%
- Hotel during business or leisure travel: 12%

Outdoors

- Net Outdoors: 33%
  - Shopping/ in a store, shop, or shopping mall: 8%
  - Outdoors - in a park, walking down the street, etc.: 14%
  - Commuting - on the way to or from work: 14%

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.
Most live streaming occasions are shared co-viewing with friends, family or colleagues, 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

Base: All respondents (4200), PC/Laptop (1562), Smartphone (2606), Tablet (1040), Gaming console (e.g., Xbox, PlayStation) (449), Smart TV (856), Video streaming devices (e.g., Chromecast, Apple TV, Roku) (416)

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

PC/Laptop
- 81 to 100: 37%
- 61 to 80: 16%
- 41-60: 18%
- 21-40: 18%
- 1-20: 7%
- 0: 5%

Smartphone
- 81 to 100: 56%
- 61 to 80: 12%
- 41-60: 9%
- 21-40: 8%
- 1-20: 5%
- 0: 5%

Tablet
- 81 to 100: 34%
- 61 to 80: 23%
- 41-60: 21%
- 21-40: 22%
- 1-20: 5%
- 0: 5%

Gaming console (e.g., Xbox, PlayStation)
- 81 to 100: 38%
- 61 to 80: 16%
- 41-60: 22%
- 21-40: 15%
- 1-20: 5%
- 0: 5%

Smart TV
- 81 to 100: 36%
- 61 to 80: 18%
- 41-60: 19%
- 21-40: 16%
- 1-20: 5%
- 0: 5%

Video streaming devices (e.g., Chromecast, Apple TV, Roku)
- 81 to 100: 28%
- 61 to 80: 24%
- 41-60: 22%
- 21-40: 22%
- 1-20: 19%
- 0: 7%
### Live video streaming inspires ‘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?

#### Activities Done while Live Streaming …

<table>
<thead>
<tr>
<th>Related to What Is Being Watched</th>
<th>Unrelated to What Is Being Watched</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checking social media</td>
<td>Checking social media</td>
</tr>
<tr>
<td>Chatting with others on social media</td>
<td>Chatting with others on social media</td>
</tr>
<tr>
<td>Chatting with others I am watching live streaming video with</td>
<td>Chatting with others I am watching live streaming video with</td>
</tr>
<tr>
<td>Commenting on social media</td>
<td>Commenting on social media</td>
</tr>
<tr>
<td>Conducting online searches</td>
<td>Conducting online searches</td>
</tr>
<tr>
<td>Using another device</td>
<td>Using another device</td>
</tr>
<tr>
<td>Sharing the live video I am watching</td>
<td>Sharing the live video I am watching</td>
</tr>
<tr>
<td>Doing work</td>
<td>Doing work</td>
</tr>
</tbody>
</table>

- **Checking social media**: 35% related, 29% unrelated.
- **Chatting with others on social media**: 27% related, 24% unrelated.
- **Chatting with others I am watching live streaming video with**: 25% related, 20% unrelated.
- **Commenting on social media**: 24% related, 20% unrelated.
- **Conducting online searches**: 24% related, 24% unrelated.
- **Using another device**: 22% related, 25% unrelated.
- **Sharing the live video I am watching**: 20% related, 18% unrelated.
- **Doing work**: 18% related, 25% unrelated.

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.
What Motivates Live Streaming
Staying up to date is a key motivator to live stream video

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

Quality content and connection speed are key drivers in choosing what to watch

- 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.
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.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content quality</td>
<td>45%</td>
</tr>
<tr>
<td>Speed of available internet connection</td>
<td>38%</td>
</tr>
<tr>
<td>Whether it's a free or paid service</td>
<td>35%</td>
</tr>
<tr>
<td>Time of the day</td>
<td>34%</td>
</tr>
<tr>
<td>Content availability</td>
<td>34%</td>
</tr>
<tr>
<td>Location/Where I am at the time</td>
<td>25%</td>
</tr>
<tr>
<td>Word of mouth/Other's recommendation</td>
<td>25%</td>
</tr>
<tr>
<td>Whether there are ads in the live streaming content</td>
<td>21%</td>
</tr>
<tr>
<td>Choice of wireless service provider</td>
<td>14%</td>
</tr>
<tr>
<td>Choice of pay TV service provider</td>
<td>13%</td>
</tr>
</tbody>
</table>

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.
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.

- Choice of pay TV service provider
- Choice of wireless service provider
- Whether there are ads in the live streaming content
- Word of mouth/Other's recommendation
- Location/Where I am at the time
- Content availability
- Time of the day
- Whether it's a free or paid service
- Speed of available internet connection
- Content quality

All Participating Markets Average

<table>
<thead>
<tr>
<th>Factor</th>
<th>All Participating Markets Average</th>
<th>APAC</th>
<th>South America</th>
<th>North America</th>
<th>MENA</th>
<th>Europe &amp; Africa</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content quality</td>
<td>45%</td>
<td>53%</td>
<td>52%</td>
<td>42%</td>
<td>28%</td>
<td>44%</td>
</tr>
<tr>
<td>Speed of available internet connection</td>
<td>38%</td>
<td>42%</td>
<td>46%</td>
<td>36%</td>
<td>32%</td>
<td>37%</td>
</tr>
<tr>
<td>Whether it's a free or paid service</td>
<td>35%</td>
<td>42%</td>
<td>31%</td>
<td>35%</td>
<td>23%</td>
<td>38%</td>
</tr>
<tr>
<td>Time of the day</td>
<td>34%</td>
<td>32%</td>
<td>32%</td>
<td>37%</td>
<td>30%</td>
<td>34%</td>
</tr>
<tr>
<td>Content availability</td>
<td>34%</td>
<td>39%</td>
<td>37%</td>
<td>36%</td>
<td>24%</td>
<td>33%</td>
</tr>
<tr>
<td>Location/Where I am at the time</td>
<td>25%</td>
<td>26%</td>
<td>25%</td>
<td>25%</td>
<td>24%</td>
<td>25%</td>
</tr>
<tr>
<td>Word of mouth/Other's recommendation</td>
<td>25%</td>
<td>35%</td>
<td>22%</td>
<td>24%</td>
<td>13%</td>
<td>26%</td>
</tr>
<tr>
<td>Whether there are ads in the live streaming content</td>
<td>21%</td>
<td>29%</td>
<td>22%</td>
<td>21%</td>
<td>15%</td>
<td>19%</td>
</tr>
<tr>
<td>Choice of wireless service provider</td>
<td>14%</td>
<td>15%</td>
<td>11%</td>
<td>13%</td>
<td>19%</td>
<td>15%</td>
</tr>
<tr>
<td>Choice of pay TV service provider</td>
<td>13%</td>
<td>14%</td>
<td>13%</td>
<td>14%</td>
<td>14%</td>
<td>12%</td>
</tr>
</tbody>
</table>

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.
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.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>It makes me up-to-date and informed</td>
<td>35%</td>
</tr>
<tr>
<td>I can check up/catch up anywhere and anytime</td>
<td>32%</td>
</tr>
<tr>
<td>I don't want to miss out</td>
<td>27%</td>
</tr>
<tr>
<td>I like the more personal feel that live streaming has</td>
<td>26%</td>
</tr>
<tr>
<td>Watch while away from home (e.g. at work, commuting etc.)</td>
<td>25%</td>
</tr>
<tr>
<td>I can interact with people of similar interests</td>
<td>25%</td>
</tr>
<tr>
<td>It makes me feel like a part of an event</td>
<td>23%</td>
</tr>
<tr>
<td>I can be the first of my friends/family to know what is happening</td>
<td>20%</td>
</tr>
<tr>
<td>That's the only way the content is available</td>
<td>16%</td>
</tr>
<tr>
<td>I can interact with the producer/maker of the content being streamed</td>
<td>16%</td>
</tr>
<tr>
<td>I don't have any other way to access this content</td>
<td>12%</td>
</tr>
</tbody>
</table>

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.
Thank you

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Appendix
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

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.
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

<table>
<thead>
<tr>
<th>Region</th>
<th>PC/Laptop</th>
<th>Smartphone</th>
<th>Tablet</th>
<th>Gaming console (e.g., Xbox, PlayStation)</th>
<th>Smart TV</th>
<th>Video streaming devices (e.g., Chromecast, Apple TV, Roku)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global Average</td>
<td>59%</td>
<td>67%</td>
<td>60%</td>
<td>64%</td>
<td>60%</td>
<td></td>
</tr>
<tr>
<td>APAC</td>
<td>62%</td>
<td>64%</td>
<td>60%</td>
<td>54%</td>
<td>48%</td>
<td></td>
</tr>
<tr>
<td>South America</td>
<td>66%</td>
<td>71%</td>
<td>62%</td>
<td>61%</td>
<td>54%</td>
<td></td>
</tr>
<tr>
<td>North America</td>
<td>64%</td>
<td>65%</td>
<td>60%</td>
<td>53%</td>
<td>43%</td>
<td></td>
</tr>
<tr>
<td>MENA</td>
<td>75%</td>
<td>75%</td>
<td>63%</td>
<td>66%</td>
<td>55%</td>
<td></td>
</tr>
<tr>
<td>Europe &amp; Africa</td>
<td>60%</td>
<td>62%</td>
<td>48%</td>
<td>54%</td>
<td>60%</td>
<td></td>
</tr>
</tbody>
</table>

Base: Use device: Total (1562/2606/1040/449/856/416), APAC (1692/70/140/34/85/54), South America (320/541/155/68/186/58), North America (205/338/170/84/137/83), MENA (81/257/76/35/82/37), Europe (787/1200/499/228/366/184)

Significantly higher/lower. Tested at 95% confidence interval.
Q29. Which of the following types of ads have you seen while live streaming

- Pop up ads that occur while watching the video
- 'Sponsored by' message at the top or bottom of the window
- Video ads before, during, or after the live steam I wanted to watch
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

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

Watch while away from home (e.g. at work, commuting etc.)

I can interact with people of similar interests

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

- Content quality
- Speed of available internet connection
- Whether it's a free or paid service
- Time of the day
- Content availability
- Location/where I am at the time
- Whether there are ads in the live streaming content
- Word of mouth/other’s recommendation

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

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