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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.
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?

Frequency of Video Streaming Global Average

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

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

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

<table>
<thead>
<tr>
<th>Country</th>
<th>Global Average</th>
<th>UAE</th>
<th>KSA</th>
<th>South Africa</th>
<th>Canada</th>
<th>China</th>
<th>Chile</th>
<th>Hungary</th>
<th>Switzerland</th>
<th>Turkey</th>
<th>Australia</th>
<th>Ireland</th>
<th>Colombia</th>
<th>Italy</th>
<th>Peru</th>
<th>Mexico</th>
<th>US</th>
<th>Germany</th>
<th>Russia</th>
<th>Sweden</th>
<th>Brazil</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 2020</td>
<td>67%</td>
<td>91%</td>
<td>89%</td>
<td>77%</td>
<td>76%</td>
<td>73%</td>
<td>72%</td>
<td>72%</td>
<td>71%</td>
<td>70%</td>
<td>69%</td>
<td>68%</td>
<td>67%</td>
<td>67%</td>
<td>66%</td>
<td>65%</td>
<td>58%</td>
<td>58%</td>
<td>56%</td>
<td>51%</td>
<td></td>
</tr>
</tbody>
</table>

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.”

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.
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>Smartphone</td>
</tr>
<tr>
<td>PC/Laptop</td>
<td>PC/Laptop</td>
</tr>
<tr>
<td>Tablet</td>
<td>Tablet</td>
</tr>
<tr>
<td>Smart TV</td>
<td>Smart TV</td>
</tr>
<tr>
<td>Gaming console (e.g., Xbox, PlayStation)</td>
<td>Gaming console (e.g., Xbox, PlayStation)</td>
</tr>
<tr>
<td>Video streaming devices (e.g., Chromecast, Apple TV, Roku)</td>
<td>Video streaming devices (e.g., Chromecast, Apple TV, Roku)</td>
</tr>
</tbody>
</table>

- Smartphone: 83% Own/Access to, 75% Use
- PC/Laptop: 62% Own/Access to, 60% Use
- Tablet: 49% Own/Access to, 51% Use
- Smart TV: 44% Own/Access to, 45% Use
- Gaming console (e.g., Xbox, PlayStation): 38% Own/Access to, 29% Use
- Video streaming devices (e.g., Chromecast, Apple TV, Roku): 23% Own/Access to, 43% Use

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

- **PC/Laptop**:
  - Several times a day: 59%
  - Once a day: 41%

- **Smartphone**:
  - Several times a day: 67%
  - Once a day: 33%

- **Tablet**:
  - Several times a day: 60%
  - Once a day: 40%

- **Gaming console (e.g., Xbox, PlayStation)**:
  - Several times a day: 48%
  - Once a day: 52%

- **Smart TV**:
  - Several times a day: 64%
  - Once a day: 36%

- **Video streaming devices (e.g., Chromecast, Apple TV, Roku)**:
  - Several times a day: 60%
  - Once a day: 40%

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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>% Who Typically Live Stream on this Device for Over 30 Min.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Long Form</strong></td>
</tr>
<tr>
<td><strong>Typically live stream on device for more than 30 min.</strong></td>
</tr>
<tr>
<td><strong>PC/Laptop</strong></td>
</tr>
<tr>
<td>More than 3 hours</td>
</tr>
<tr>
<td>2 to 3 hours</td>
</tr>
<tr>
<td>1 to 2 hours</td>
</tr>
<tr>
<td>30 to 60 minutes</td>
</tr>
<tr>
<td><strong>Smartphone</strong></td>
</tr>
<tr>
<td>More than 3 hours</td>
</tr>
<tr>
<td>2 to 3 hours</td>
</tr>
<tr>
<td>1 to 2 hours</td>
</tr>
<tr>
<td>30 to 60 minutes</td>
</tr>
<tr>
<td><strong>Tablet</strong></td>
</tr>
<tr>
<td>More than 3 hours</td>
</tr>
<tr>
<td>2 to 3 hours</td>
</tr>
<tr>
<td>1 to 2 hours</td>
</tr>
<tr>
<td>30 to 60 minutes</td>
</tr>
<tr>
<td><strong>Gaming console (e.g., Xbox, PlayStation)</strong></td>
</tr>
<tr>
<td>More than 3 hours</td>
</tr>
<tr>
<td>2 to 3 hours</td>
</tr>
<tr>
<td>1 to 2 hours</td>
</tr>
<tr>
<td>30 to 60 minutes</td>
</tr>
<tr>
<td><strong>Smart TV</strong></td>
</tr>
<tr>
<td>More than 3 hours</td>
</tr>
<tr>
<td>2 to 3 hours</td>
</tr>
<tr>
<td>1 to 2 hours</td>
</tr>
<tr>
<td>30 to 60 minutes</td>
</tr>
<tr>
<td><strong>Video streaming devices (e.g., Chromecast, Apple TV, Roku)</strong></td>
</tr>
<tr>
<td>More than 3 hours</td>
</tr>
<tr>
<td>2 to 3 hours</td>
</tr>
<tr>
<td>1 to 2 hours</td>
</tr>
<tr>
<td>30 to 60 minutes</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Device</th>
<th>10 to 30 minutes</th>
<th>Under 10 minutes</th>
<th>It varies</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>PC/Laptop</td>
<td>23%</td>
<td>11%</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Smartphone</td>
<td>24%</td>
<td>20%</td>
<td>6%</td>
<td>2%</td>
</tr>
<tr>
<td>Tablet</td>
<td>27%</td>
<td>14%</td>
<td>6%</td>
<td>2%</td>
</tr>
<tr>
<td>Gaming console (e.g., Xbox, PlayStation)</td>
<td>16%</td>
<td>12%</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Smart TV</td>
<td>16%</td>
<td>10%</td>
<td>7%</td>
<td>2%</td>
</tr>
<tr>
<td>Video streaming devices (e.g., Chromecast, Apple TV, Roku)</td>
<td>14%</td>
<td>12%</td>
<td>8%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Typically live stream for less than 30 min.

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

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

- **Social platforms (Snapchat Stories, Instagram Stories, Facebook Live, Twitter, etc.):** 52%
- **Digital streaming subscription (Hulu Live, YouTube Live, DirectTV Now, Sling TV, PlayStation Vue, etc.):** 41%
- **TV network website or app (e.g., ITV Hub, All4, BT Sport):** 34%
- **Gaming website or app:** 33%
- **My pay TV service provider website or app:** 21%
- **Other:** 9%

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

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

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 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
- Digital streaming subscription
- TV network website or app
- Gaming website or app
- My pay TV service provider website or app

**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.

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.
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

- 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%

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 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>Content Type</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>29%</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.

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.
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
- Video by online celebrity/influencer
- News
- Talk shows

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

- TV series/episodes
- Sporting games/matches
- Gaming sessions/eSports (e.g., video game competitions)
- Video by online celebrity/influencer
- Video by friends or family
- Concerts
- Tutorial or how-to video
- News
- Talks 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.
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 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% extremely likely)
  - Probably likely: 65% (32% probably likely)
- Recorded matches on TV: 53% (24% recorded matches on TV)
- Recorded matches online: 52% (23% recorded matches online)

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

- To watch live matches on TV
- To watch live streaming matches online

Global Average:
- To watch live matches on TV: 71%
- To watch live streaming matches online: 65%

Country Comparisons:
- China: 87%
- Russia: 78%
- KSA: 78%
- Peru: 76%
- Mexico: 74%
- Colombia: 82%
- UAE: 75%
- Brazil: 74%
- South Africa: 71%
- United Kingdom: 74%
- United States: 74%
- Chile: 74%
- Australia: 66%
- Canada: 71%
- Ireland: 74%
- Italy: 67%
- Switzerland: 67%
- Turkey: 67%
- Germany: 69%
- Sweden: 73%
- Hungary: 62%

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

- To watch recorded matches on TV, global average
- To watch recorded 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.

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

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>Media Channel/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
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 the 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**: 56%
- **Pay TV via cable, satellite, or telco TV subscription**: 36%
- **Streaming video service with on-demand/pre-recorded content only (Netflix, Amazon Prime, etc.)**: 33%
- **Streaming music service (e.g. Spotify, Pandora, etc.)**: 25%
- **Gaming service (e.g. Xbox Live, PlayStation Network, EA Access, etc.)**: 25%
- **Live streaming video service**: 17%

*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?

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.
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

- 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>Watch free live streaming video content that has ads in it</th>
<th>Pay a subscription fee for a package of live video content over a month, with no advertising</th>
<th>Pay for individual live video I want to watch, with no advertising</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global Average</td>
<td>52%</td>
<td>30%</td>
<td>18%</td>
</tr>
<tr>
<td>APAC</td>
<td>38%</td>
<td>35%</td>
<td>27%</td>
</tr>
<tr>
<td>South America</td>
<td>59%</td>
<td>30%</td>
<td>11%</td>
</tr>
<tr>
<td>North America</td>
<td>54%</td>
<td>30%</td>
<td>16%</td>
</tr>
<tr>
<td>MENA</td>
<td>31%</td>
<td>33%</td>
<td>36%</td>
</tr>
<tr>
<td>Europe &amp; Africa</td>
<td>55%</td>
<td>28%</td>
<td>16%</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:

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>TV network website or app</th>
<th>My pay TV service provider website or app</th>
<th>Social platforms</th>
<th>Gaming website or app</th>
<th>Digital streaming subscription</th>
</tr>
</thead>
<tbody>
<tr>
<td>Today</td>
<td>39%</td>
<td>30%</td>
<td>14%</td>
<td>40%</td>
</tr>
<tr>
<td>A couple of days ago</td>
<td>35%</td>
<td>30%</td>
<td>11%</td>
<td>40%</td>
</tr>
<tr>
<td>Last week</td>
<td>29%</td>
<td>14%</td>
<td>27%</td>
<td>28%</td>
</tr>
<tr>
<td>A few weeks ago</td>
<td>14%</td>
<td>7%</td>
<td>12%</td>
<td>6%</td>
</tr>
<tr>
<td>More than a month ago</td>
<td>6%</td>
<td>4%</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>Not sure/Don't remember</td>
<td>8%</td>
<td>10%</td>
<td>8%</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 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?

- Pop up ads that occur while watching the video: 39%
- Video ads before, during, or after the live stream I wanted to watch: 37%
- ‘Sponsored by’ message at the top or bottom of the window: 33%
- Video ads overlaid on the video window while the video was playing: 27%
- Still image overlaid on the video window while the video was playing: 21%
- Still image around the video player window: 21%
- Some other type of ad: 20%

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?

- **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?
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?

### Recall

<table>
<thead>
<tr>
<th>Region</th>
<th>More/Better/Faster</th>
<th>About the same</th>
<th>Less/Lower/Slower</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global Average</td>
<td>33%</td>
<td>36%</td>
<td>30%</td>
</tr>
<tr>
<td>APAC</td>
<td>32%</td>
<td>41%</td>
<td>28%</td>
</tr>
<tr>
<td>South America</td>
<td>39%</td>
<td>32%</td>
<td>29%</td>
</tr>
<tr>
<td>North America</td>
<td>35%</td>
<td>36%</td>
<td>29%</td>
</tr>
<tr>
<td>MENA</td>
<td>24%</td>
<td>33%</td>
<td>44%</td>
</tr>
<tr>
<td>Europe &amp; Africa</td>
<td>33%</td>
<td>38%</td>
<td>29%</td>
</tr>
</tbody>
</table>

### Intrusive

<table>
<thead>
<tr>
<th>Region</th>
<th>More/Better/Faster</th>
<th>About the same</th>
<th>Less/Lower/Slower</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global Average</td>
<td>21%</td>
<td>49%</td>
<td>30%</td>
</tr>
<tr>
<td>APAC</td>
<td>18%</td>
<td>49%</td>
<td>33%</td>
</tr>
<tr>
<td>South America</td>
<td>24%</td>
<td>46%</td>
<td>30%</td>
</tr>
<tr>
<td>North America</td>
<td>21%</td>
<td>52%</td>
<td>28%</td>
</tr>
<tr>
<td>MENA</td>
<td>17%</td>
<td>44%</td>
<td>40%</td>
</tr>
<tr>
<td>Europe &amp; Africa</td>
<td>22%</td>
<td>50%</td>
<td>29%</td>
</tr>
</tbody>
</table>
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?

<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>

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.
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?
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
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.
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.

<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>

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

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

### 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
- In a cafe, pub, bar, or restaurant: 14%
- Outdoors - in a park, walking down the street, etc.: 14%
- Commuting - on the way to or from work: 14%
- Shopping/ in a store, shop, or shopping mall: 8%

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.
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.

Group consumption appears to take place – especially on smartphones.
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 …

Related to What Is Being Watched
- Checking social media: 35%
- Chatting with others on social media: 27%
- Chatting with others I am watching live streaming video with: 25%
- Commenting on social media: 24%
- Conducting online searches: 24%
- Using another device: 22%
- Sharing the live video I am watching: 20%
- Doing work: 18%

Unrelated to What Is Being Watched
- Checking social media: 29%
- Chatting with others on social media: 24%
- Chatting with others I am watching live streaming video with: 20%
- Commenting on social media: 20%
- Conducting online searches: 24%
- Using another device: 25%
- Sharing the live video I am watching: 18%
- Doing work: 25%

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

<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.
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
- Word of mouth/Other's recommendation
- Whether there are ads in the live streaming content
- Choice of wireless service provider
- Choice of pay TV service provider

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.

<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>26%</td>
<td>25%</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.
Thank you
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

- **Female vs. Male**
  - APMA: All participating markets average: 47% Female, 53% Male
  - APAC: 50% Female, 51% Male
  - South America: 43% Female, 57% Male
  - North America: 50% Female, 50% Male
  - MENA: 38% Female, 63% Male
  - Europe & Africa: 50% Female, 50% Male

- **Age Group**
  - APMA: All participating markets average: 34% 35+, 66% 18 to 34
  - APAC: 30% 35+, 70% 18 to 34
  - South America: 21% 35+, 79% 18 to 34
  - North America: 42% 35+, 58% 18 to 34
  - MENA: 35% 35+, 65% 18 to 34
  - Europe & Africa: 37% 35+, 63% 18 to 34

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</th>
<th>Smart TV</th>
<th>Video streaming devices</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global Average</td>
<td>59%</td>
<td>71%</td>
<td>62%</td>
<td>66%</td>
<td>71%</td>
<td>75%</td>
</tr>
<tr>
<td>APAC</td>
<td>54%</td>
<td>64%</td>
<td>62%</td>
<td>66%</td>
<td>64%</td>
<td>75%</td>
</tr>
<tr>
<td>South America</td>
<td>66%</td>
<td>66%</td>
<td>64%</td>
<td>78%</td>
<td>71%</td>
<td>56%</td>
</tr>
<tr>
<td>North America</td>
<td>56%</td>
<td>64%</td>
<td>65%</td>
<td>71%</td>
<td>60%</td>
<td>62%</td>
</tr>
<tr>
<td>MENA</td>
<td>62%</td>
<td>63%</td>
<td>66%</td>
<td>65%</td>
<td>63%</td>
<td>60%</td>
</tr>
<tr>
<td>Europe &amp; Africa</td>
<td>60%</td>
<td>60%</td>
<td>64%</td>
<td>62%</td>
<td>60%</td>
<td>62%</td>
</tr>
</tbody>
</table>

Base: Use device: Total (1562/2606/1040/449/856/416), APAC (169/270/140/34*85/85), 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

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.
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?

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.
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.

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.
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.
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

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.

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

I can interact with people of similar interests
Q15. Which of the following factors influence your choice of live video streaming sources? Please select all that apply.

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

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
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- Whether it's a free or paid service
- Time of the day
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- Word of mouth/other's recommendation
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- Location/where I am at the time

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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
- Location/where I am at the time
- Word of mouth/other's recommendation
- Whether there are ads in the live streaming content

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.
Questions?

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