



LIVE VIDEO STREAMING: AUSTRALIA AND THE WORLD

JUNE 2018



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SAMPLE & METHODOLOGY

This report is a localised version of the “Live Video Streaming – A Global Perspective” report conducted by the U.S. IAB in conjunction with OnDevice Research. The original report is [available for download here](#).

METHOD:

- 29 question survey was designed and fielded in 21 markets
- All respondents were asked the same core questions.
- Localisation was put in place for HH income, along with brand/channel specific localisations 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/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): KSA, UAE
- NORTH AMERICA (N=600): Canada, Mexico, United States
- SOUTH AMERICA (N=800): Brazil, Chile, Colombia, Peru

SAMPLING PLAN:

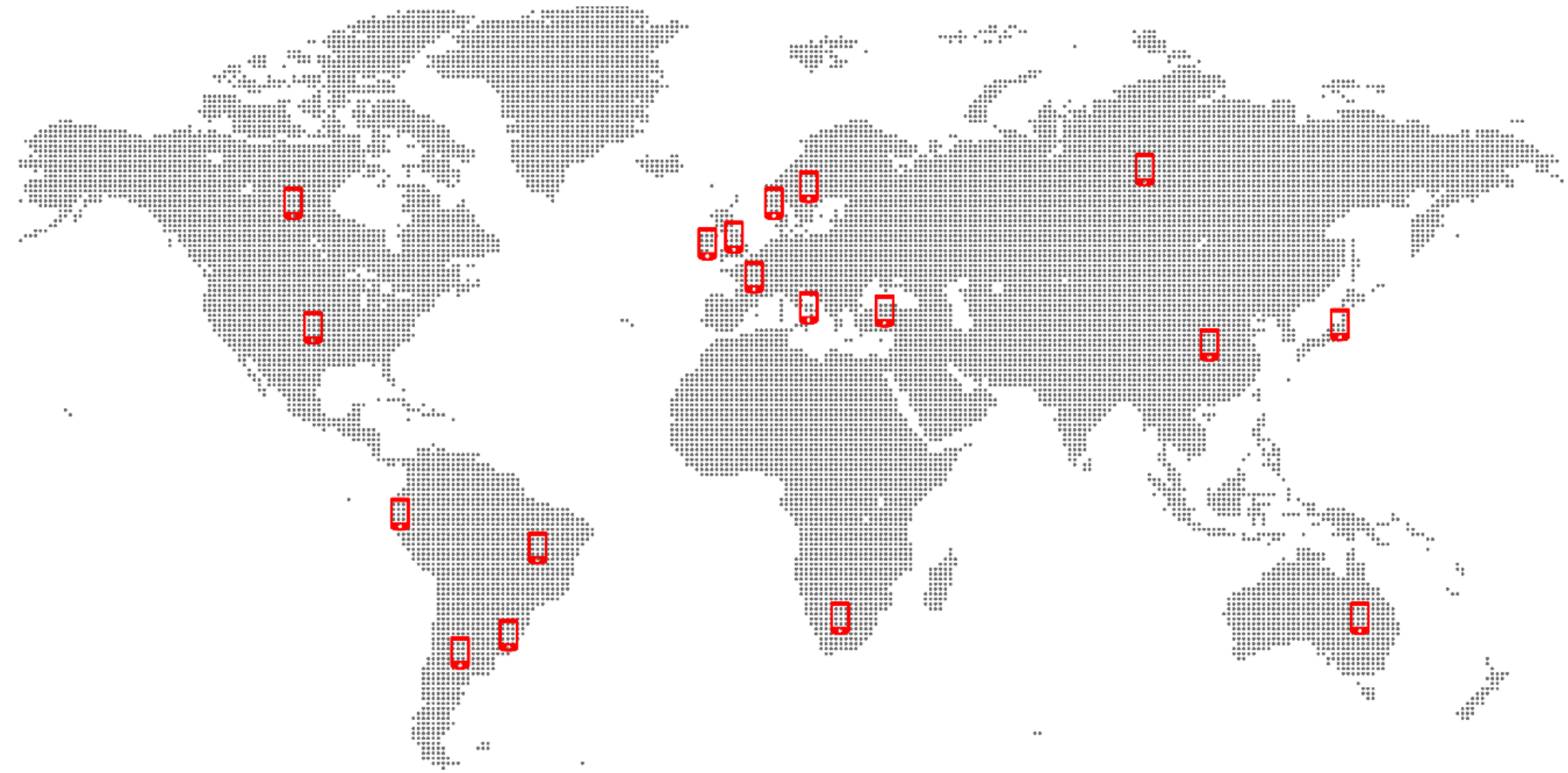
- All sampling was conducted by OnDevice Research, using dynamic sampling methods.
- When sampling for the project, we attempted to gain a nationally representative profile for each market who started the survey and let the desired sample target (Live content streamers) fall out from this.
- The objective 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.

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Source: IAB Live Video Streaming – A Global Perspective, June, 2018

OBJECTIVES AND BACKGROUND

21 countries participated in the research and 4200 'live video streamers' were recruited, 200 in each country. When referencing global average or regional average throughout this report, the results are derived from the 21 participating IAB countries participating in the research. See Appendix for more details on methodology and sample specification.



Source: IAB Live Video Streaming – A Global Perspective, June, 2018

KEY GLOBAL FINDINGS ON VIDEO STREAMERS

This research profiles consumers who live stream digital video. Note that it is claimed behaviour but gives important guidance on different device and content consumption across different markets.

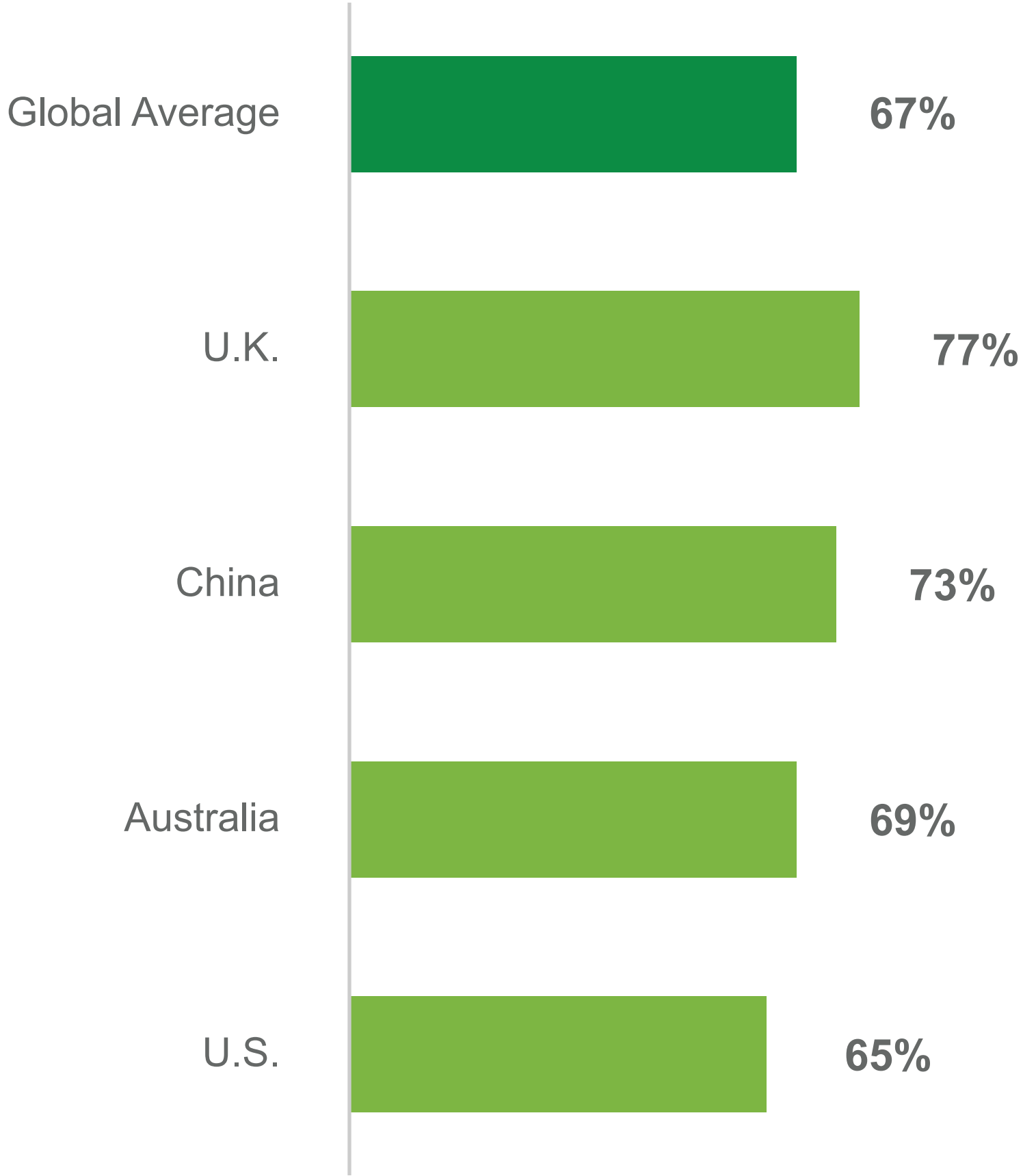
- **Video content is in demand and looks set to grow further.**
 - 70% stream video content at least once a day. 67% have live streamed video on any platform or device with 47% saying they have increased their live streaming since last year
- **Smartphones facilitate frequency of access – but do not command the most screen time.**
 - Smartphones and Tablets are used for short, under 30 min. 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.**
- **TV is the most popular type of live video content accessed.**
- **Nearly two-thirds plan to live stream the 2018 World Cup globally while around half plan to watch video recordings of the 2018 World Cup online or on TV.**
- **Consumers in most countries prefer free, ad-supported live video streaming over subscription services or ala carte services.**
 - 52% of consumers globally prefer free, ad supported live streaming
- **Live streaming is a ‘daily activity’, that provokes social interactions.**

Source: IAB Live Video Streaming – A Global Perspective, June, 2018

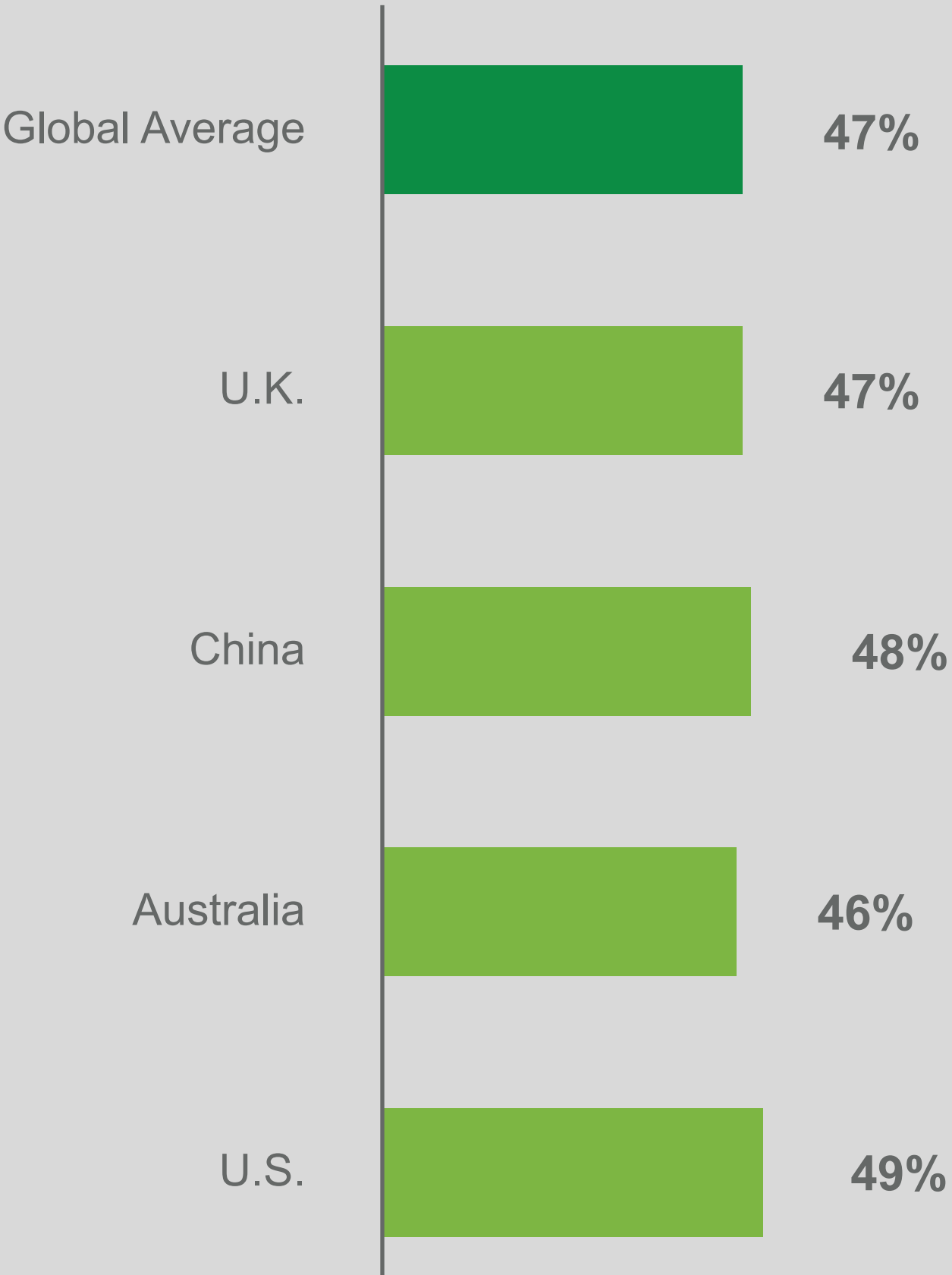
**MARKET OPPORTUNITY:
HOW POPULAR IS LIVE
VIDEO STREAMING?**

Two-thirds of digital video consumers have live streamed video

Roughly 7 in 10 respondents in Australia have viewed live streaming video



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



Source: IAB Live Video Streaming – A Global Perspective, June, 2018

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



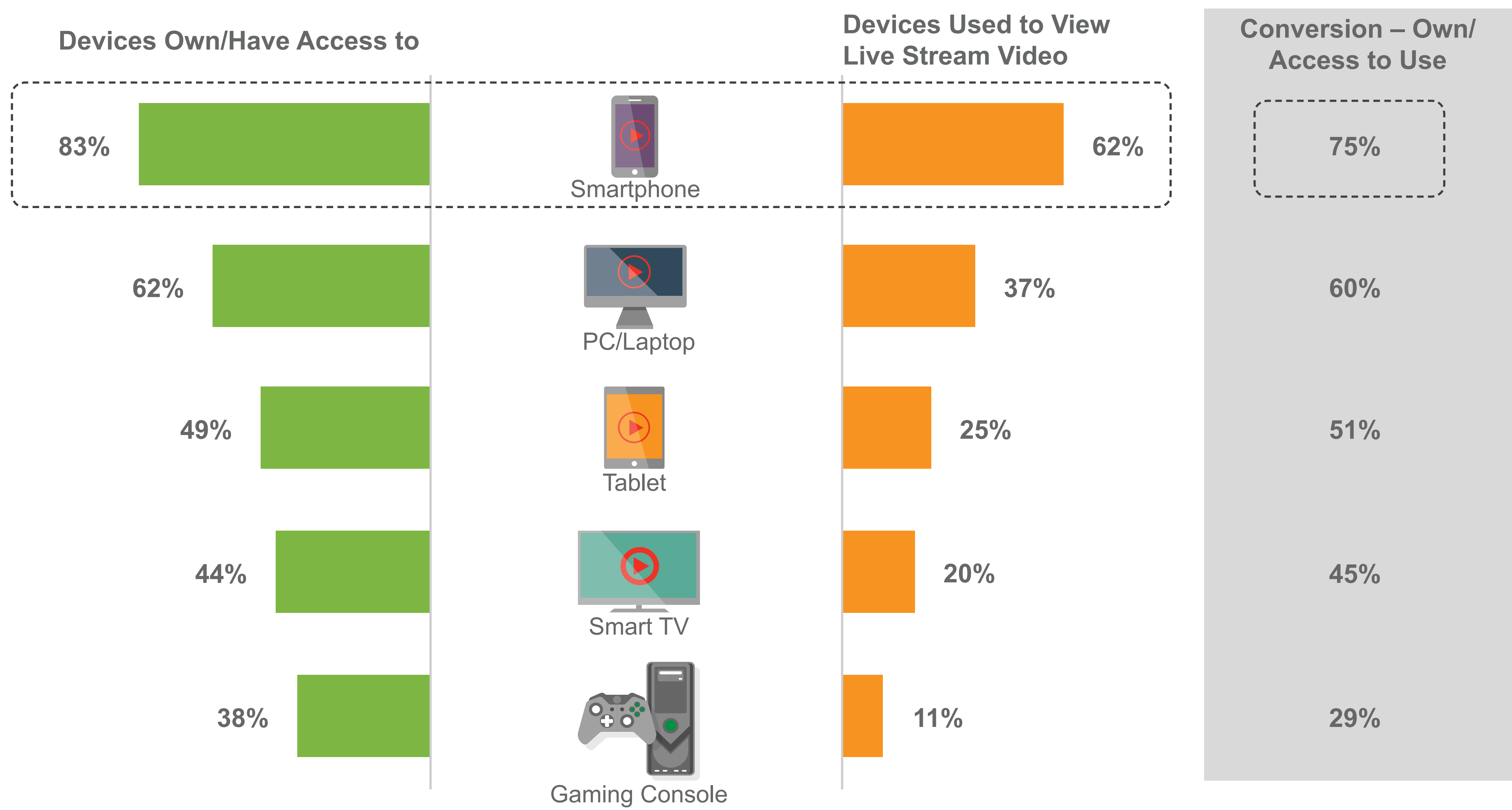
WHICH DEVICES ARE USED AND HOW FREQUENTLY FOR LIVE VIDEO STREAMING

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

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

Question: 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.



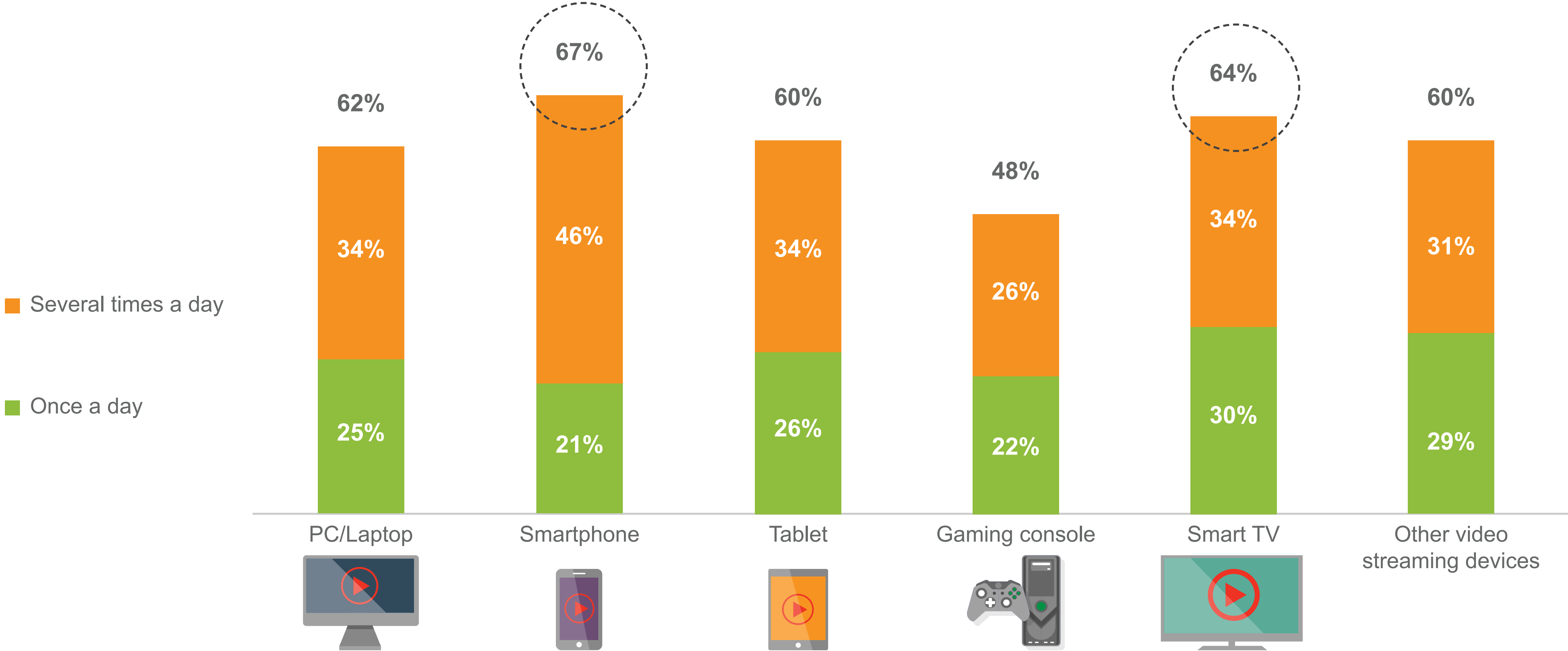
Source: IAB Live Video Streaming – A Global Perspective, June, 2018

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

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

Question: 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



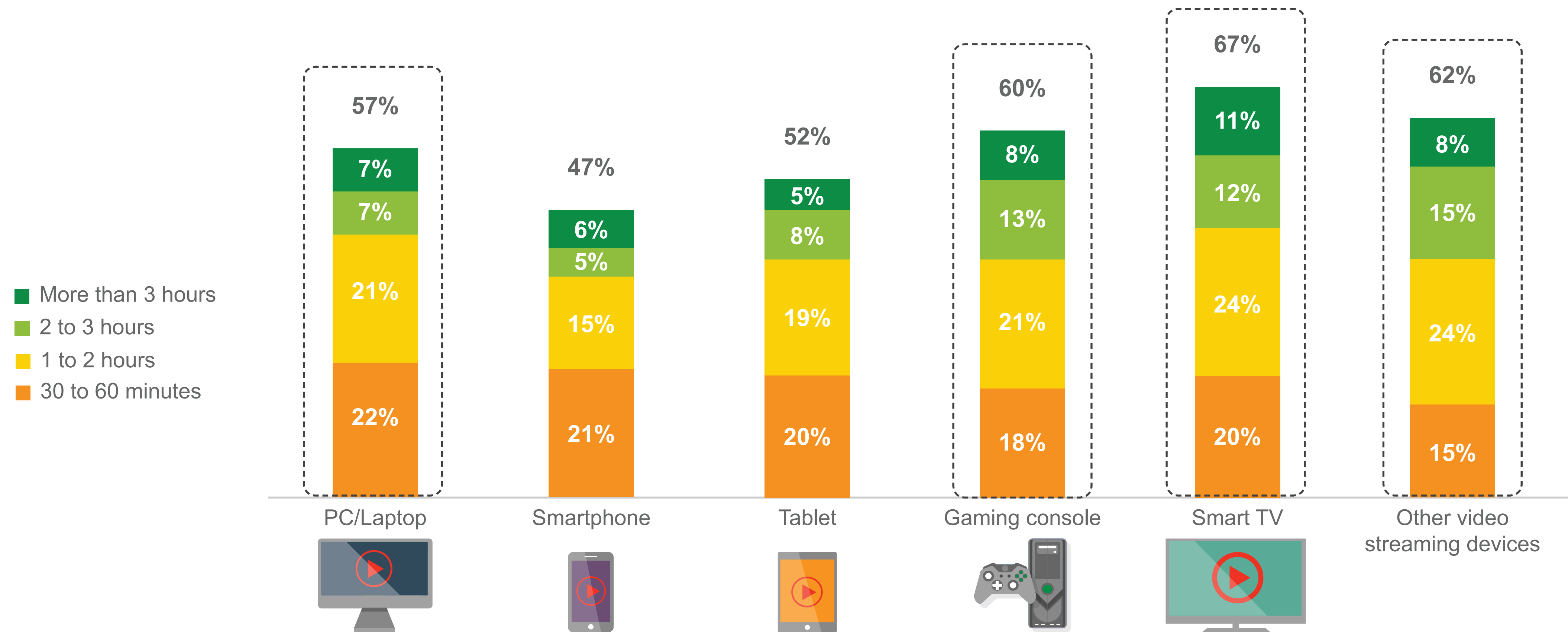
Source: IAB Live Video Streaming – A Global Perspective, June, 2018

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

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

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

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



Source: IAB Live Video Streaming – A Global Perspective, June, 2018

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

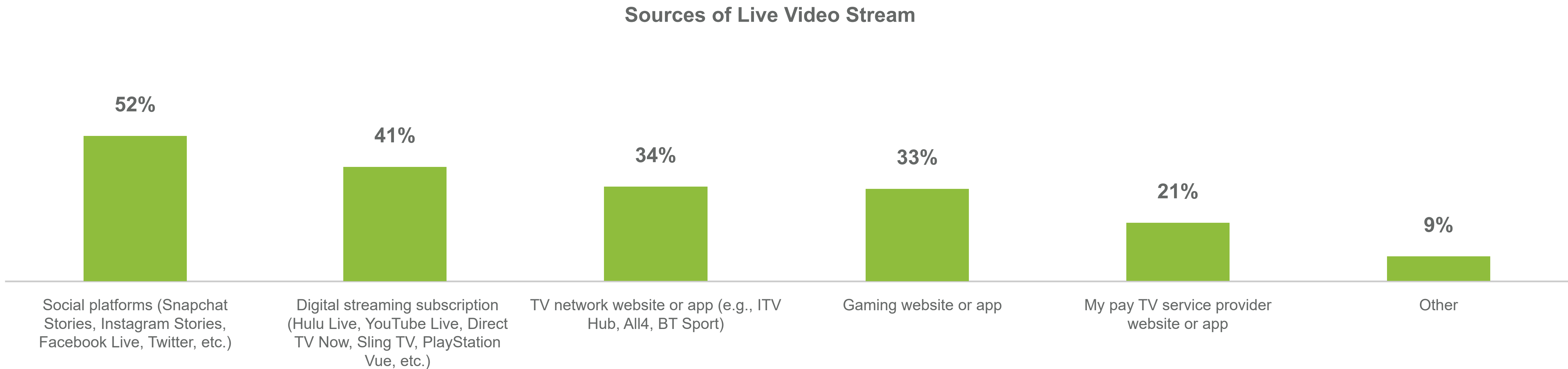
SOURCES OF LIVE STREAMED VIDEO

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

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

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

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

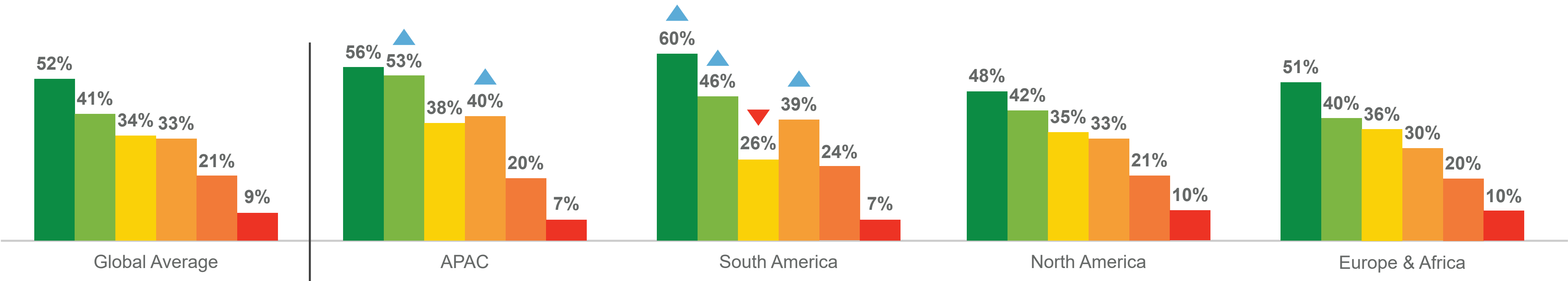


Source: IAB Live Video Streaming – A Global Perspective, June, 2018

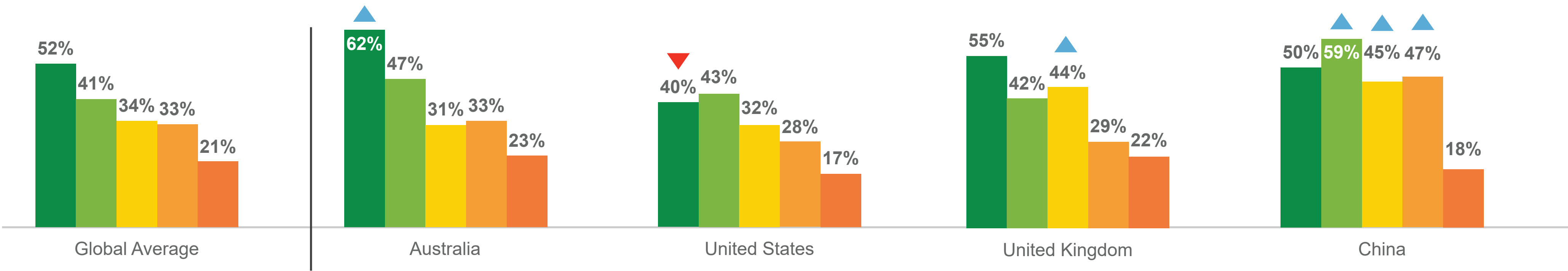
Base: All respondents (4200), APAC (400), South America (800), North America (600), MENA (400), Europe (2000)

In South America, there is more reliance on social platforms and digital subscriptions for live video content.

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



- Streaming subscriptions, TV network sites, and gaming apps are used significantly more as a source of live video content in China
- Streaming subscriptions are the top source of live streamed content in the U.S.



■ Social platforms ■ Digital streaming ■ TV network website or app ■ Gaming website or app ■ My pay TV service provider website or app ■ Other

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

Source: IAB Live Video Streaming – A Global Perspective, June, 2018

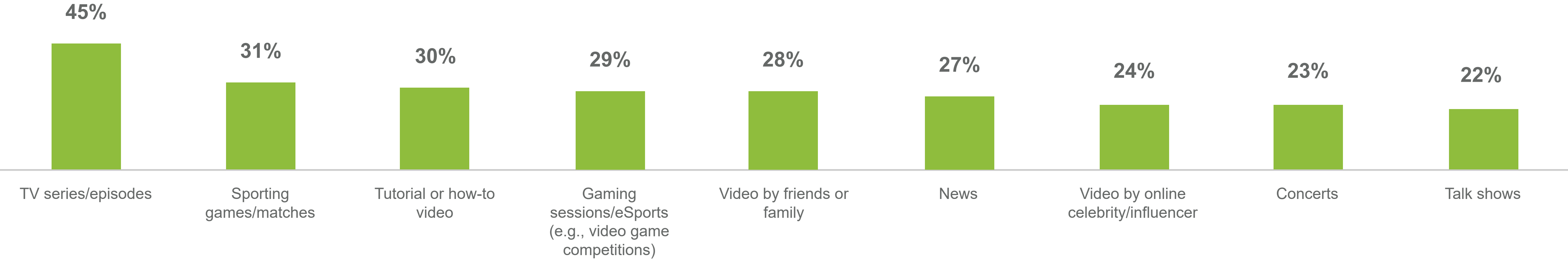
Base: All respondents (4200), APAC (400), South America (800), North America (600), MENA (400), Europe (2000), per market (200)

TYPES OF VIDEO CONTENT LIVE STREAMED

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

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

Typical Content Types Live Streamed

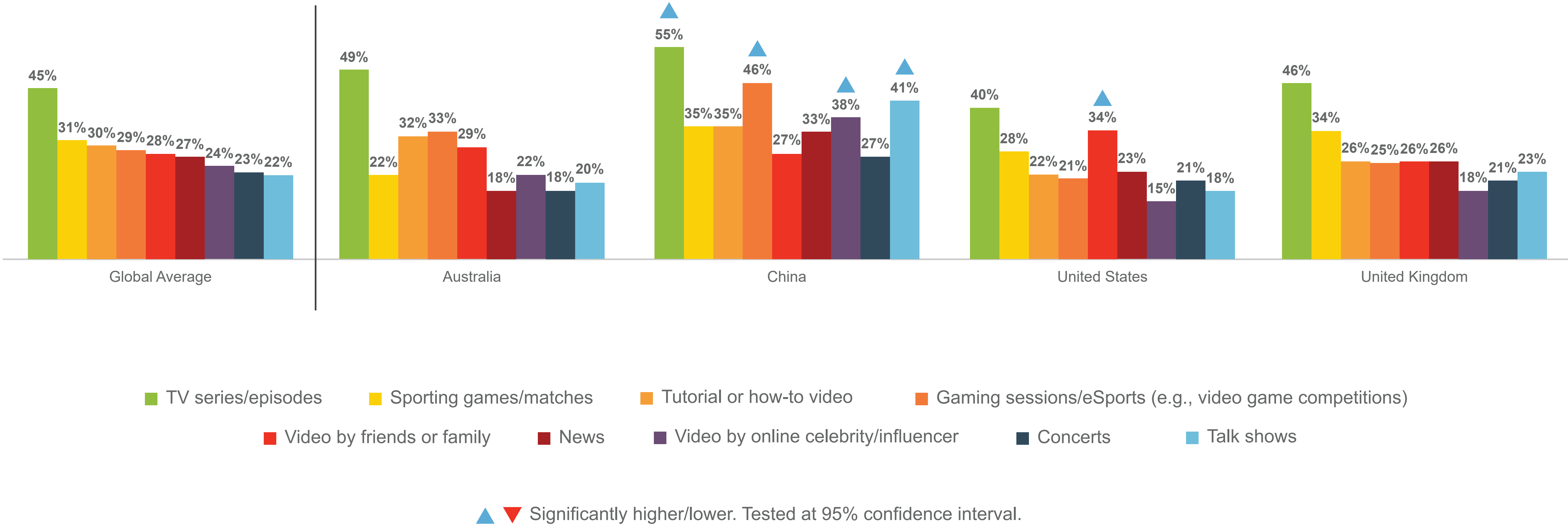


Source: IAB Live Video Streaming – A Global Perspective, June, 2018

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

Gaming, 'influencer videos,' and talk shows are significantly more popular in China

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



Source: IAB Live Video Streaming – A Global Perspective, June, 2018

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

SUBSCRIPTIONS AND ADVERTISING

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

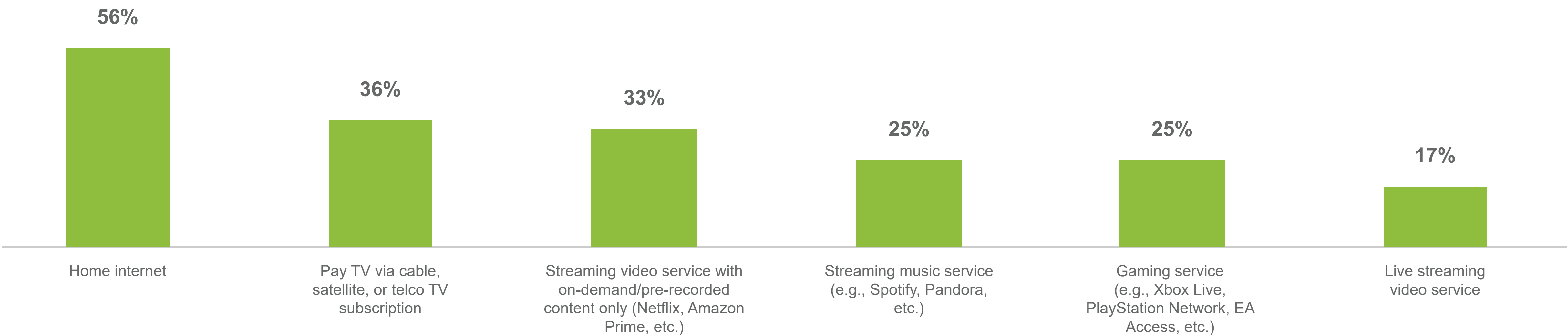
- **Consumers who live stream are open to advertising encounters in exchange for free content**
 - 52% globally say they would rather watch free live streamed video content that has ads in it
 - There is a clear opportunity to monetize in MENA, where 36% say they would rather pay per individual video streamed without any advertising. APAC also offers opportunities, with 27% stating the same
- **Advertising encounters are common across all streaming avenues**
 - Pop ups, pre-roll, and sponsored-by ad units are the ads most visible to consumers
- **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
- **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

Source: IAB Live Video Streaming – A Global Perspective, June, 2018

Global: 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

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



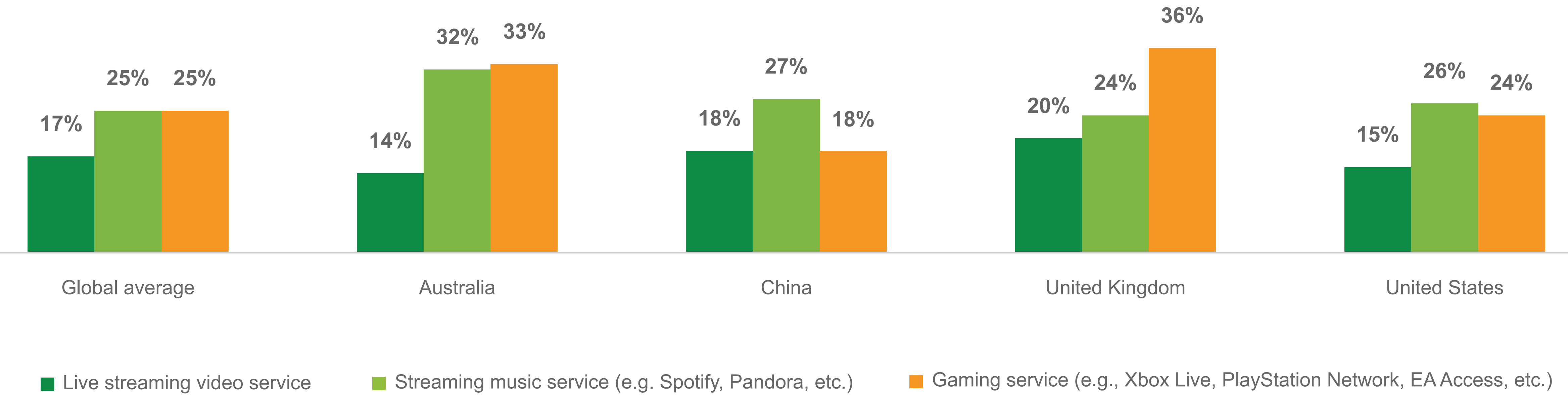
Source: IAB Live Video Streaming – A Global Perspective, June, 2018

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

Global: Streaming music services are more popular than live streaming video services

● Gaming services are more popular in the U.K. and Australia

Question: Which of the following subscriptions do you or your household currently pay for?

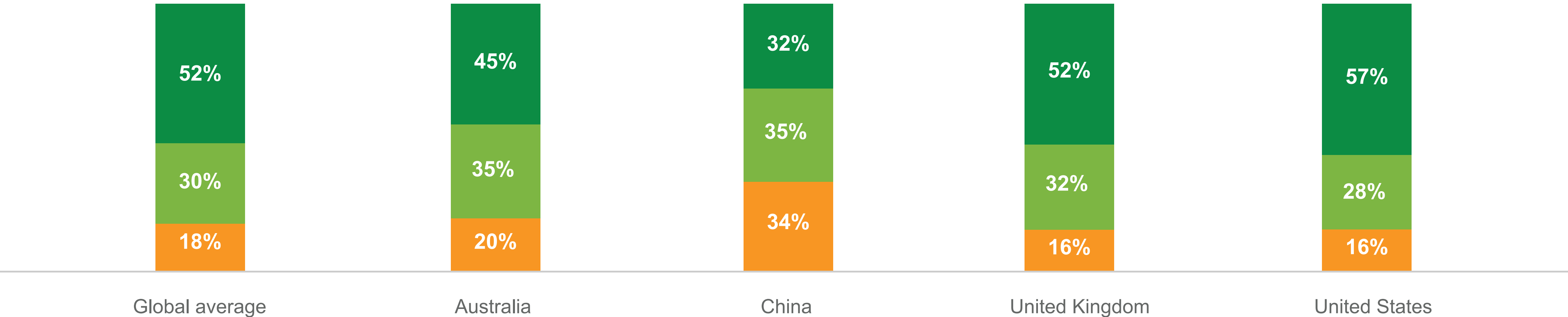


Source: IAB Live Video Streaming – A Global Perspective, June, 2018

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

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

Question: Specifically related to live streaming video, would you rather:



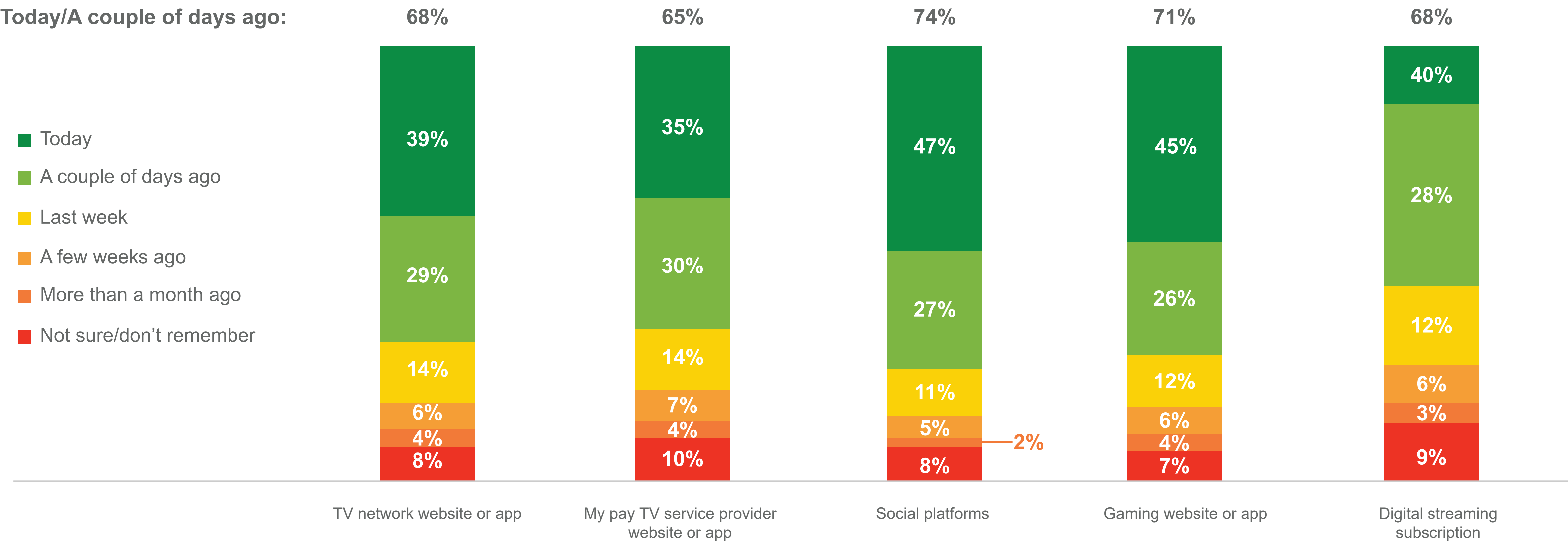
- Watch free live streaming video content that has ads in it
- Pay a subscription fee for a package of live video content over a month, with no advertising
- Pay for individual live video I want to watch, with no advertising

Source: IAB Live Video Streaming – A Global Perspective, June, 2018

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

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

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



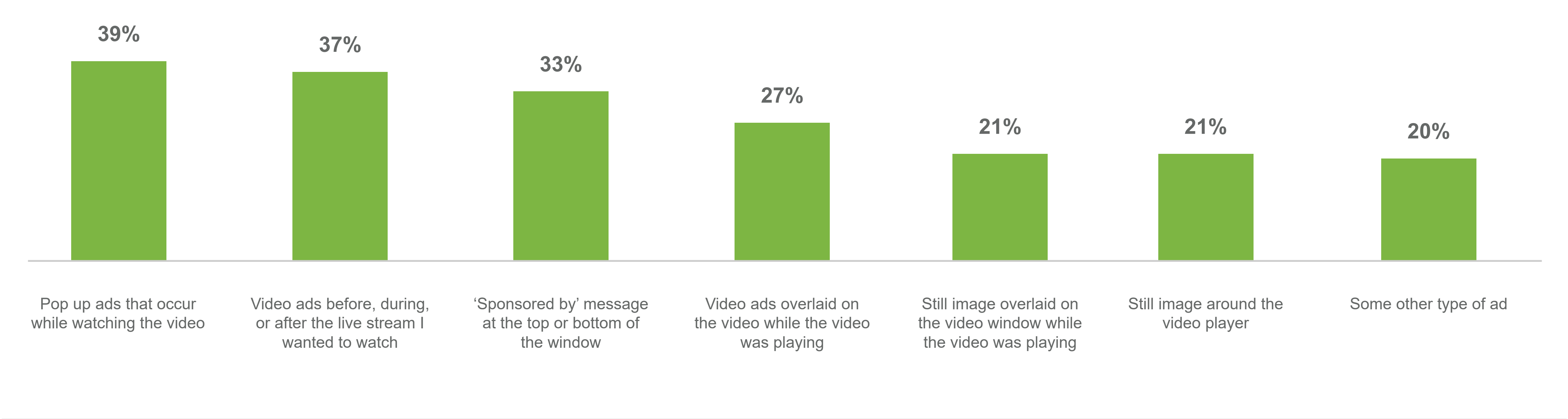
Source: IAB Live Video Streaming – A Global Perspective, June, 2018

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

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

Question: Which of the following types of ads have you seen while live streaming?

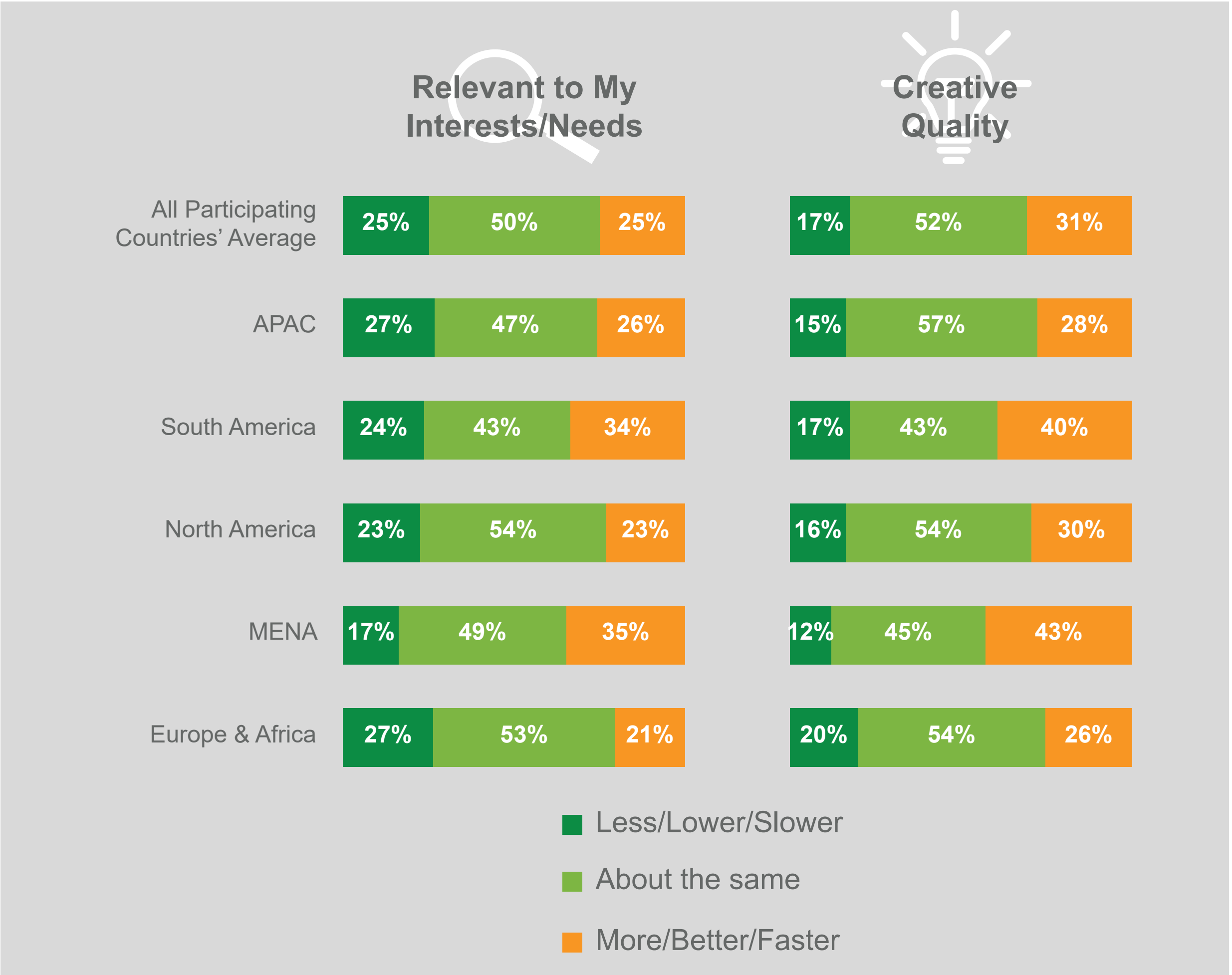
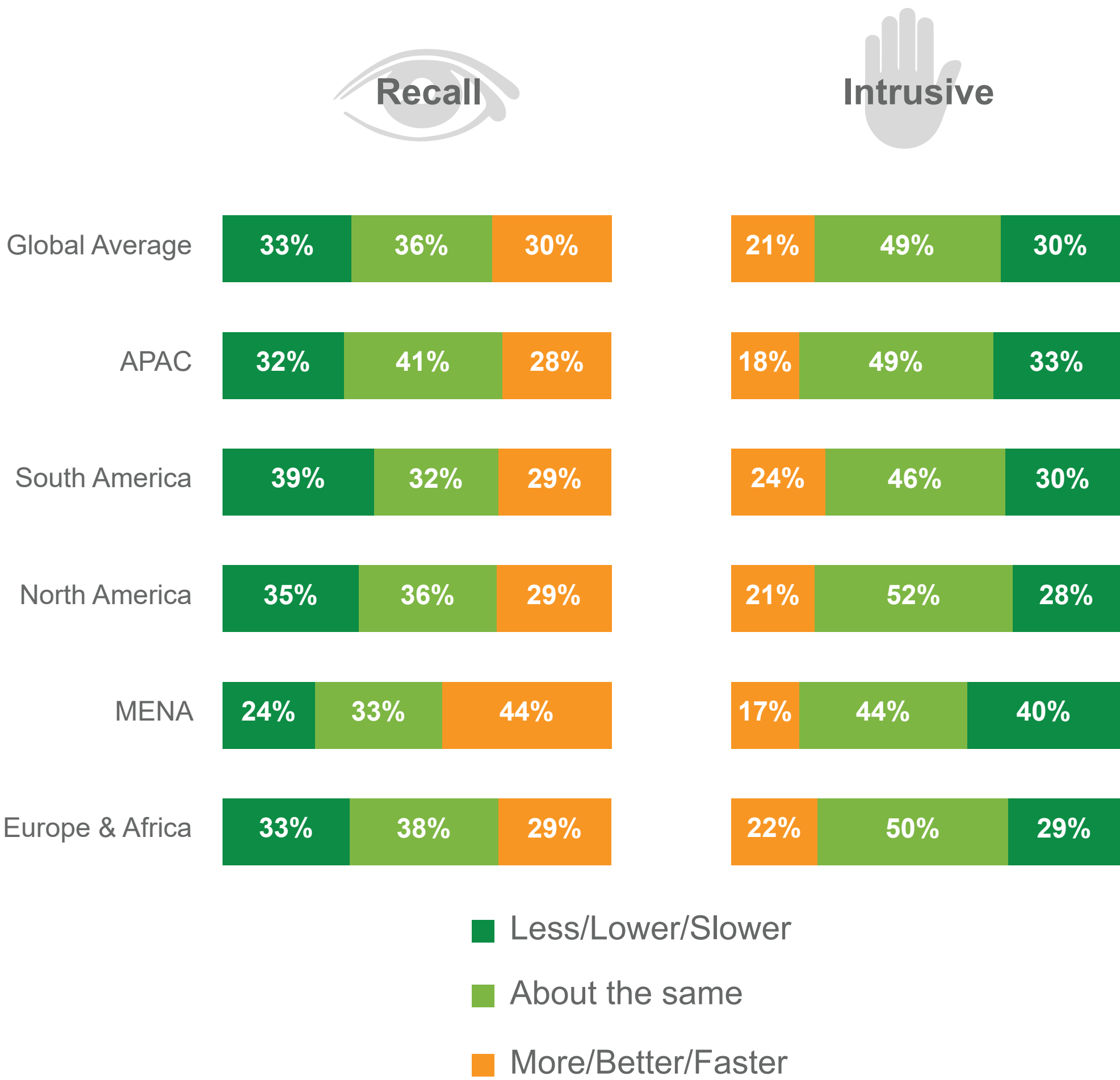


Source: IAB Live Video Streaming – A Global Perspective, June, 2018

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

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

Question: 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?

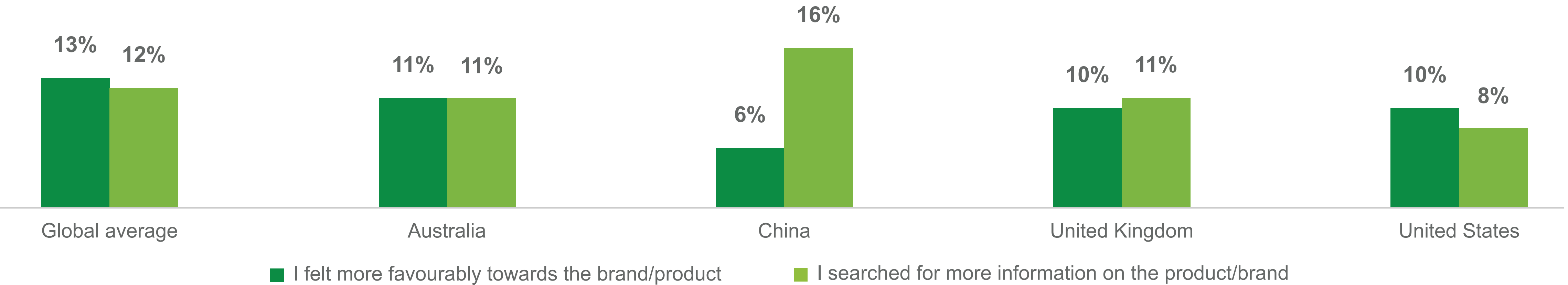


Source: IAB Live Video Streaming – A Global Perspective, June, 2018

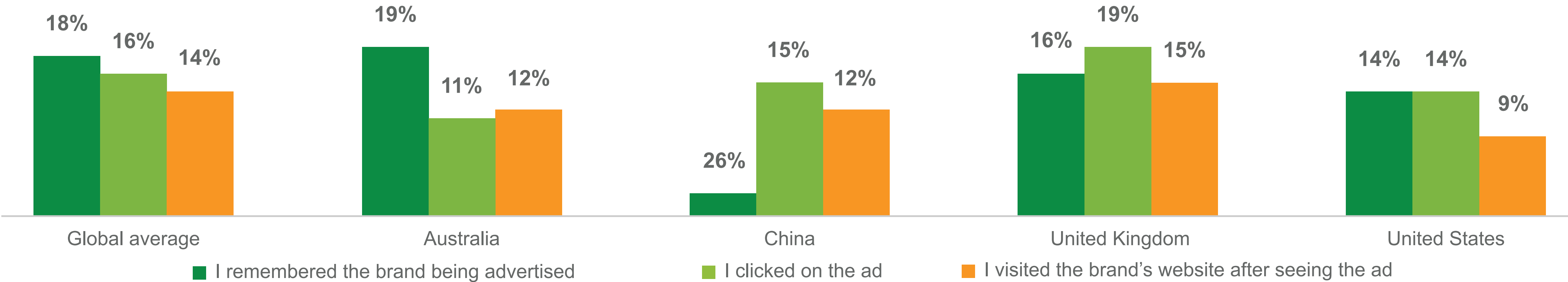
Base: All respondents (4200), APAC (400), South America (800), North America (600), MENA (400), Europe (2000), per market (200)

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

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



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



Source: IAB Live Video Streaming – A Global Perspective, June, 2018

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

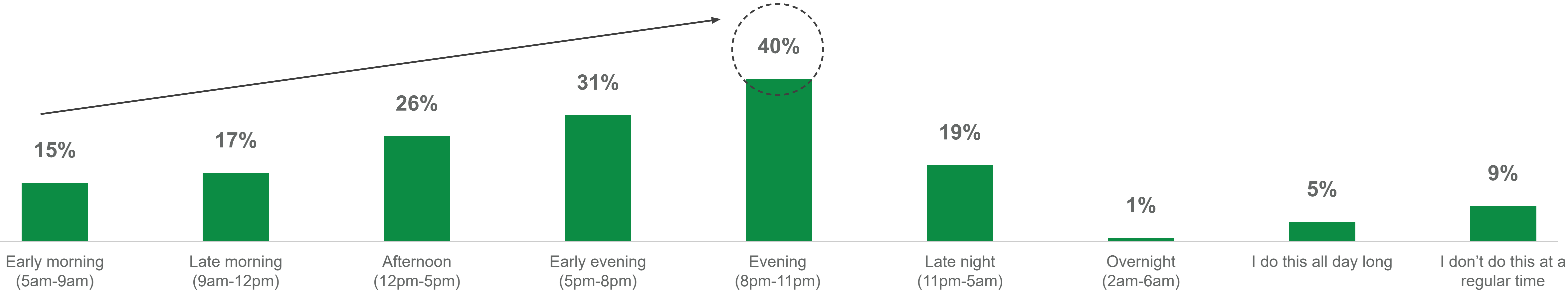
**WHEN AND WHERE LIVE VIDEO
CONTENT IS STREAMED**

Live streaming is a daily activity that provokes social interaction

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

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

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



● **Australians prefer to consume live video content in the early evening, from 5pm to 8pm**

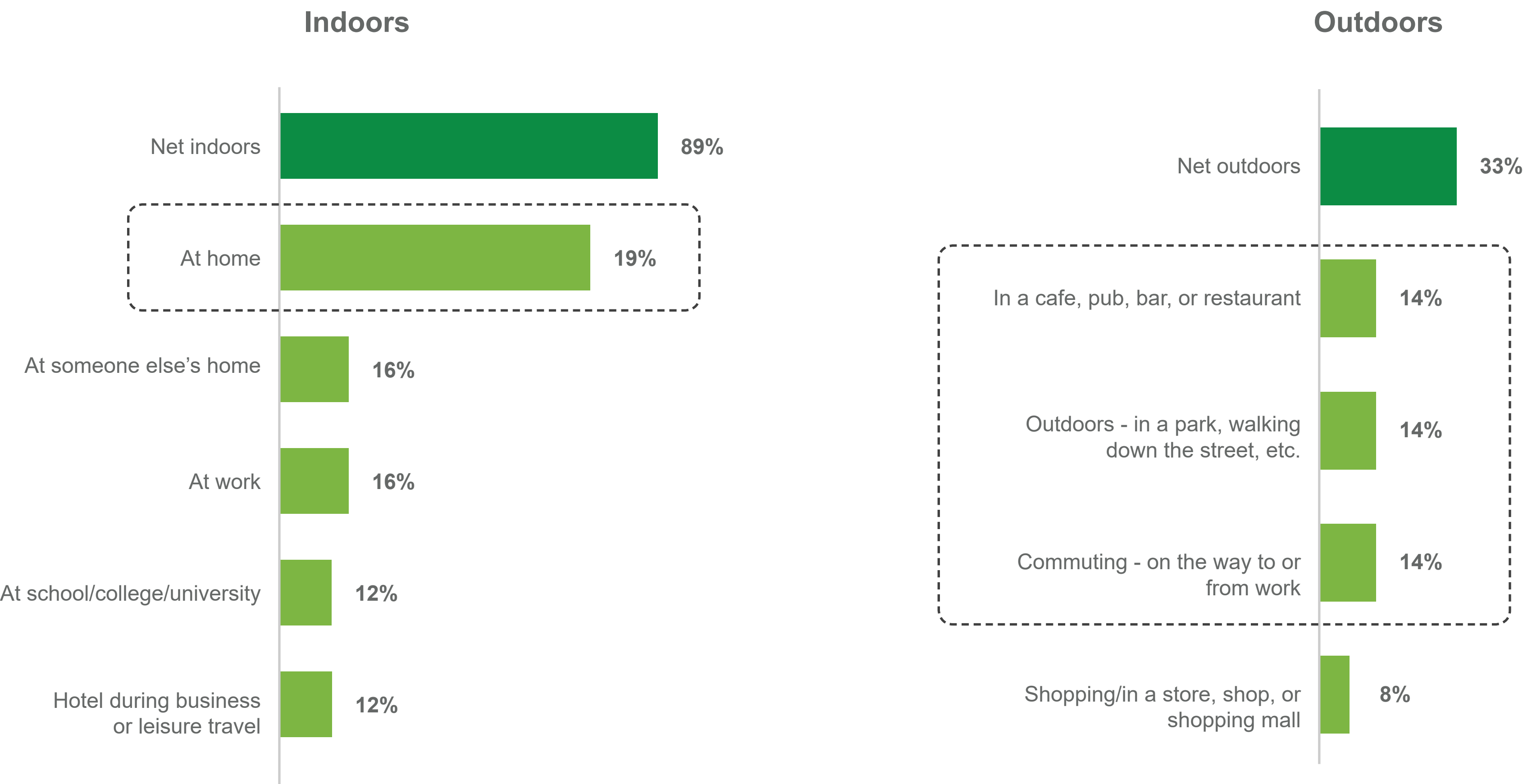
| Time Period | Top Market |
|-------------------------|-----------------------------------|
| Early morning (5am-9am) | Columbia, KSA & South Africa: 26% |
| Late morning (9am-12pm) | UAE & KSA: 26% |
| Afternoon (12pm-5pm) | Mexico: 33% / Turkey: 31% |
| Early evening (5pm-8pm) | Australia: 41% |
|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

Source: IAB Live Video Streaming – A Global Perspective, June, 2018

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

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

Question: And typically where are you when you are live streaming content?

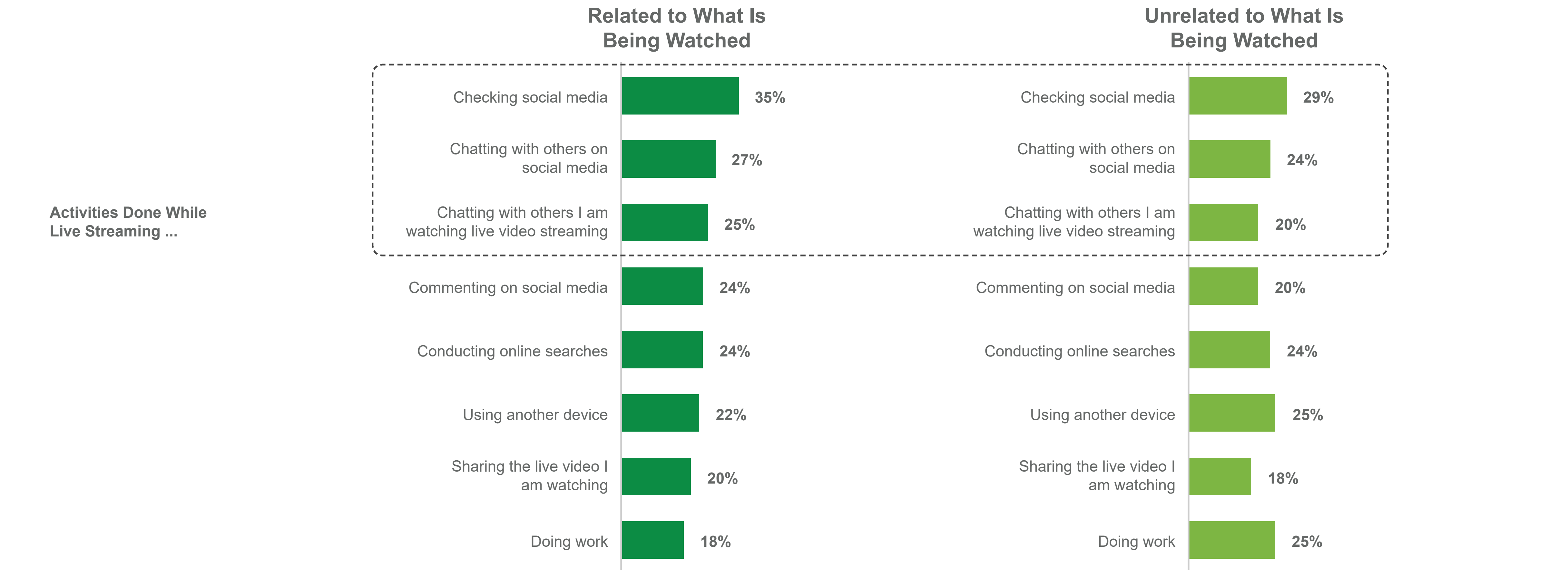


Source: IAB Live Video Streaming – A Global Perspective, June, 2018

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

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

Question: 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?



Source: IAB Live Video Streaming – A Global Perspective, June, 2018

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

WHAT MOTIVATES LIVE STREAMING

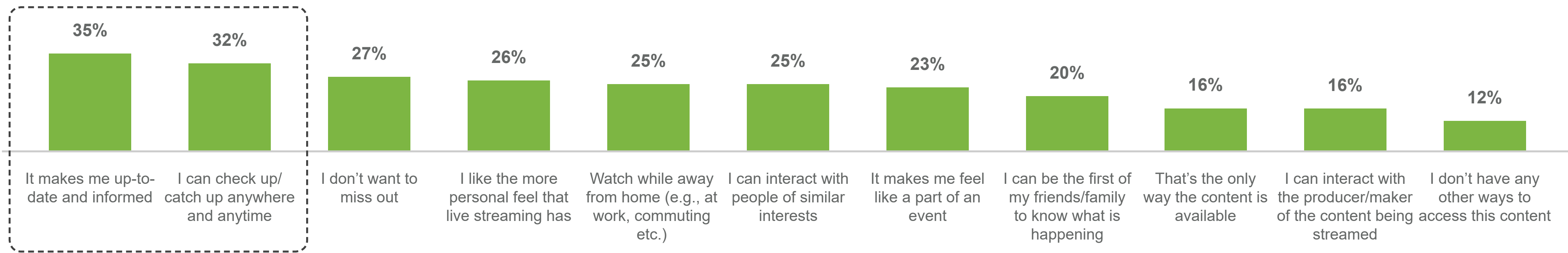
They won't miss out – but you must offer quality (content & connection)

- **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 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 fulfil 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.

Source: IAB Live Video Streaming – A Global Perspective, June, 2018

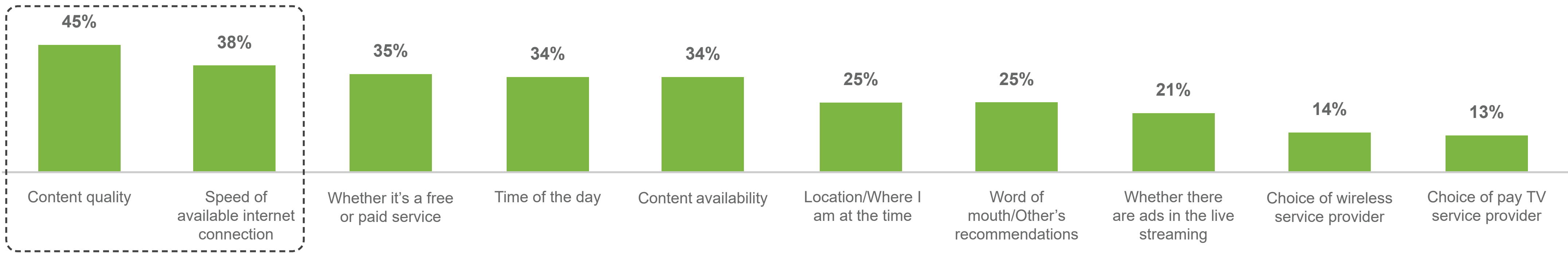
Being up-to-date is the primary motivation for live streaming

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



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

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



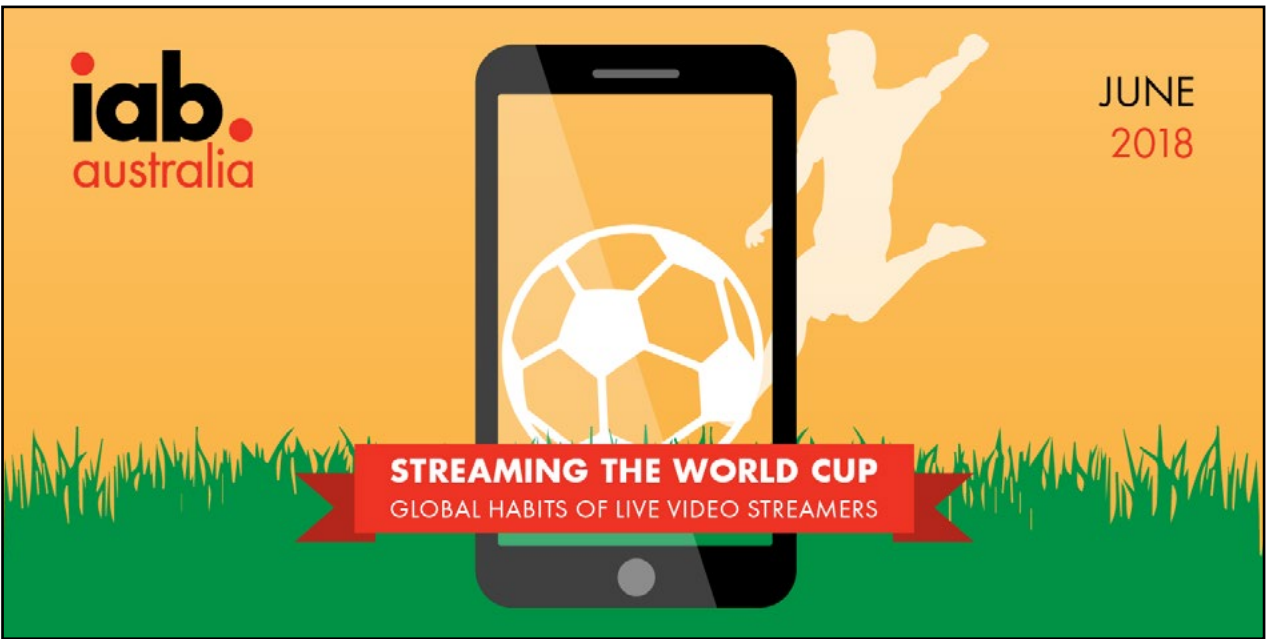
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Base: All respondents (4200), APAC (400), South America (800), North America (600), MENA (400), Europe (2000), per market (200)

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Latest Nickable Chart

[Streaming the FIFA World Cup – June 2018](#)



69% of Australian Internet users have live streamed video in the past. This Infographic takes a look at how these consumers from around the world plan to watch the 2018 FIFA World Cup.

Latest Statistics

[Digital Ad Ops Melbourne 2018: Digital Fact Pack](#)



Get all the latest facts and figures - including the latest IVT benchmarks - from the IAB Digital Ad Ops Fact Pack.

Latest Whitepaper

[Creativity in Video Whitepaper – April 2018](#)



This whitepaper is designed to help simplify the creative process, showcase best practise and appreciate video as a platform that behaves differently dependent on device.

Stay up-to-date with IAB Australia and the work we do to simplify and inspire the digital advertising industry by following us on [LinkedIn](#), [Twitter](#) and [Facebook](#), and [subscribing to our monthly newsletter](#).

