



THE STREAMING WARS:

THE REAL-TIME DIFFERENTIATOR

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FOREWORD

In our previous 'Streaming Wars' [report](#), we found consumers were willing to pay no more than \$20 on their streaming subscriptions – just about two platforms or services. Given there are 200+ companies offering streaming services to choose from, it's clear not everyone is going to survive the fight. In response to such a packed playing field, we've seen many companies turn towards "live" offerings as a potential differentiator. "Live" doesn't necessarily mean real-time and in our most recent research, we can see a gap between the live streaming experiences companies are offering and consumer appetite that doesn't have tolerance for latency or low quality content. With more than one in 10 streaming service consumers (11%) already using a service that offers a "live" option and not having tried it, most providers need to find a way to convert them into higher paying subscribers.

The Streaming Wars: The Real-Time Differentiator looks to help close the knowledge gap between providers and consumers to get at the heart of what's stopping them from making "live" content a bigger part of their everyday streaming experience. It's clear, like many things, it all boils down to issues of quality and convenience, much of which can only be solved by streams in real-time as opposed to just "live."

More than half of consumers said they'd abandon a poor-quality live stream in just 90 seconds or less (53%). That's a limited window to capture and keep their attention and from a technological perspective, it's something few companies are prepared and able to handle.

Sports content provides an incredible opportunity for companies looking to close this gap. After all, it's one of the few viewing experiences that still demands to be watched live. Sports fans, as we know from previous [research](#), are unlikely to be tolerant of delays, buffering and quality issues while watching. No one wants to see a Tweet about a touchdown before they see it on the stream. Further, as esports continue to gain mainstream traction and new sports gambling laws take effect, the sports industry has the potential to greatly redefine and profit from the "live" experience in the coming years. There is also the potential to fail spectacularly if they can't turn those live streams into quality real-time streams.

The streaming landscape is increasingly noisy and "live" offerings certainly have the power to emerge as a key differentiator. Its success hinges on delivering not just the content, but the experience of quality, convenience and accessibility consumers demand.

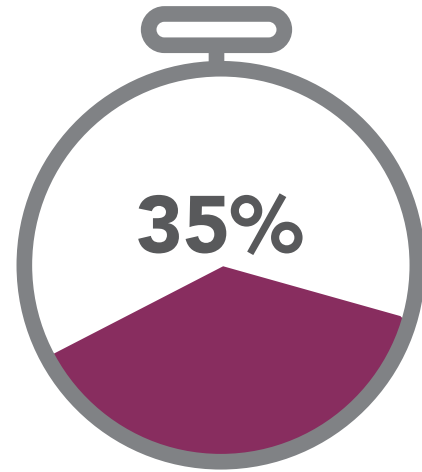
CONTENT IS ONLY ONE PART OF THE EQUATION, TECHNOLOGY IS THE OTHER

It doesn't matter how great the content is – **if the consumer can't access it they won't.**



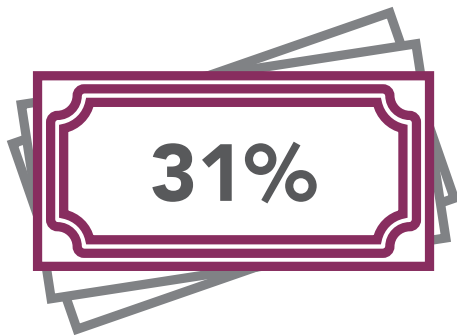
More than half (53%)

would abandon a poor-quality stream in
90 seconds or less



More than one in three (35%)

would give a stream one-minute-tops
to improve issues like lag time before giving
up and turning it off



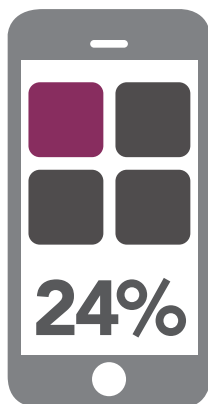
Nearly one in three (31%)

don't want to pay extra to stream live content

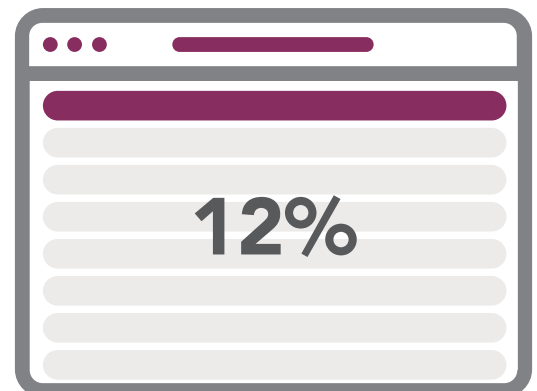


16% still need a cable subscription

to access the content they want



Nearly one in four (24%) don't know if the
platforms they subscribe to even offer a live option



Nearly one in eight (12%) don't know
where to find the content they want to stream

THE "LIVE" VS. "REAL-TIME" POTENTIAL

There is an appetite for live content, but only if providers can deliver on the quality and convenience consumers demand. To do so, they need to be thinking about streaming their content in real-time in order to support the right balance of high-quality, low-latency and synchronous viewing needed for an optimal user experience.



More than one in four (27 percent) of U.S. adults using streaming services **don't think live is worth paying for yet due to poor streaming quality**



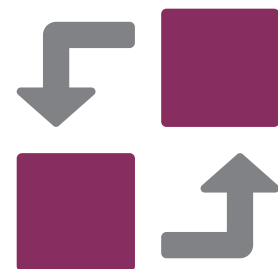
Nearly half (44%) of those who use streaming services **aren't willing to pay more than \$5/month on live-content subscriptions right now**



More than one in five (21%) don't stream live content more often because **they don't want to deal with quality issues like latency and buffering**



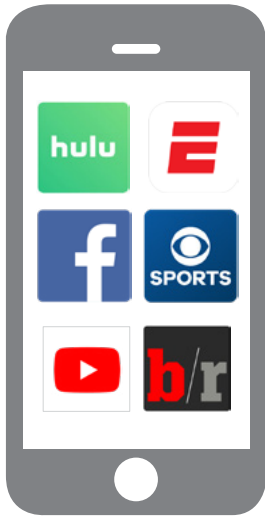
More than one in 10 (11%) streaming service users **use platforms that offers a live option, but haven't tried it**



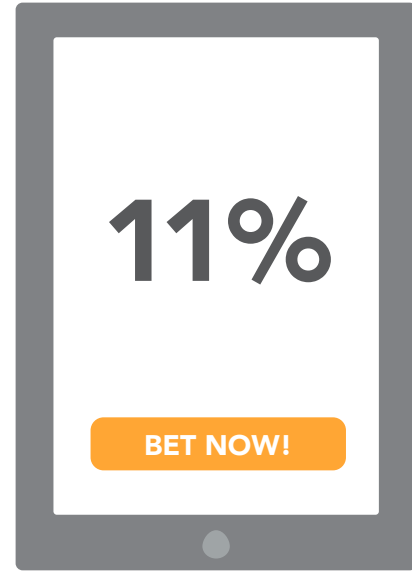
More than one in six (19%) current streaming service users would be **likely to switch platforms if there was an alternative with a better live option**

SPORTS AS A 'WINNING' OPPORTUNITY

Offering sports is a logical entry point into the "live" game. It is one of the last viewing experiences that demands to be watched in real-time.



Over one in eight (13%) think that **there are too many services to sign up for to get the sports coverage** they want, indicating an opportunity to provide a one-stop-shop offering



Legalized in-game betting will open revenue doors, as more than one in ten (11%) **are willing to engage in sports betting online** (and this comes only two months after the Supreme Court ruling)

ESPORTS IS GROWING AND EDGING INTO THE MAINSTREAM

Amongst those who have heard of esports:

11%

More than one in 10 (11 %) are planning to watch more esports this year

12%

Nearly one in eight (12%) wish there was more esports content available to watch

10%

One in 10 (10%) are more likely to choose a streaming provider if they offer esports live streams