



**THE STREAMING WARS:**

THE FUTURE OF STREAMING

2018



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## FOREWORD

It seems that everyday, The Streaming Wars turn a new corner as a slew of platforms, networks and franchises debut their flashy technology investments and partnerships. No doubt that competition fuels business, but when heavyweights like Amazon, Verizon and Disney enter the game, everyone else begins to wonder: *how do we separate from the pack?*

Part two of our “Streaming Wars” report, the “Future of Streaming,” kept circling back to one simple solution to the problems of today’s platforms – *offering “true live” or “real-time” streaming at broadcast scale*. Forty percent of people don’t plan to live stream at all in 2018 and the culprit is latency (i.e. delays, buffering, picture quality). It’s because today’s platforms stream “live” and not in “real-time”. Separating from the pack means solving latency once and for all – and this resolution will show in the bottom

line, as more than one in eight people who don’t plan on live streaming in 2018 would be more likely to do so if latency wasn’t a consistent issue.

The net-net: new, stiff competition coupled with limited consumer dollars poses legitimate obstacles for survival in the 2018 streaming market. Consumers are getting smarter and becoming fed up with the same old technology – evident by how they are only willing to buy one or two streaming subscriptions – reporting a case of “content fatigue.” The good news is that changing the status quo is completely attainable this year – we just need to redirect and create a proper real-time experience at scale, not just one or the other. Once we reach this peak, we can then move towards innovation, like streaming in virtual reality and 360 viewing. We still have a ways to go, but the future is near and looking bright once we start making bold moves.

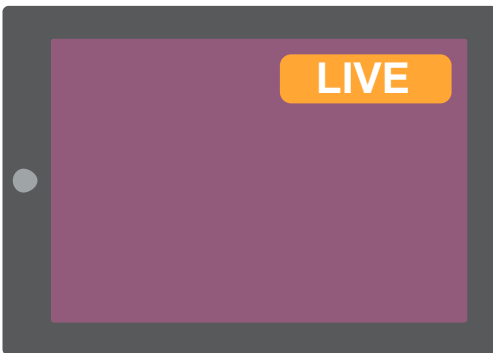
## CONSUMERS ARE PUTTING A CAP ON STREAMING

This year, **42% of U.S. adults** would be willing to spend between **\$1 - \$20 per month on streaming subscriptions**. This limits the average person to just **one or two** platforms.

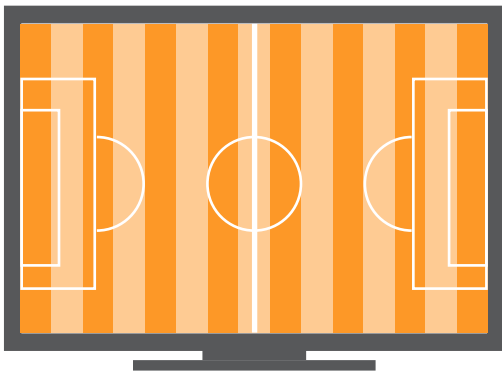


**Latency** seems to be the culprit behind why **40%** of Americans don't plan to live stream at all in 2018. The business impact of latency is a serious concern, as **more than one in eight** would be more likely to use a streaming subscription if latency wasn't a consistent issue.

## LIVE LIVES BUT ONLY IF DONE RIGHT



**Nearly half of consumers** (49%) want to watch content as-it-happens. Whether it's a fear of next-day spoilers, which **one in 13** (7%) report feeling, or otherwise, streaming in real-time is a necessity



**Content fatigue is a real thing** so it's time to stop focusing on original content and instead offer content that's truly live



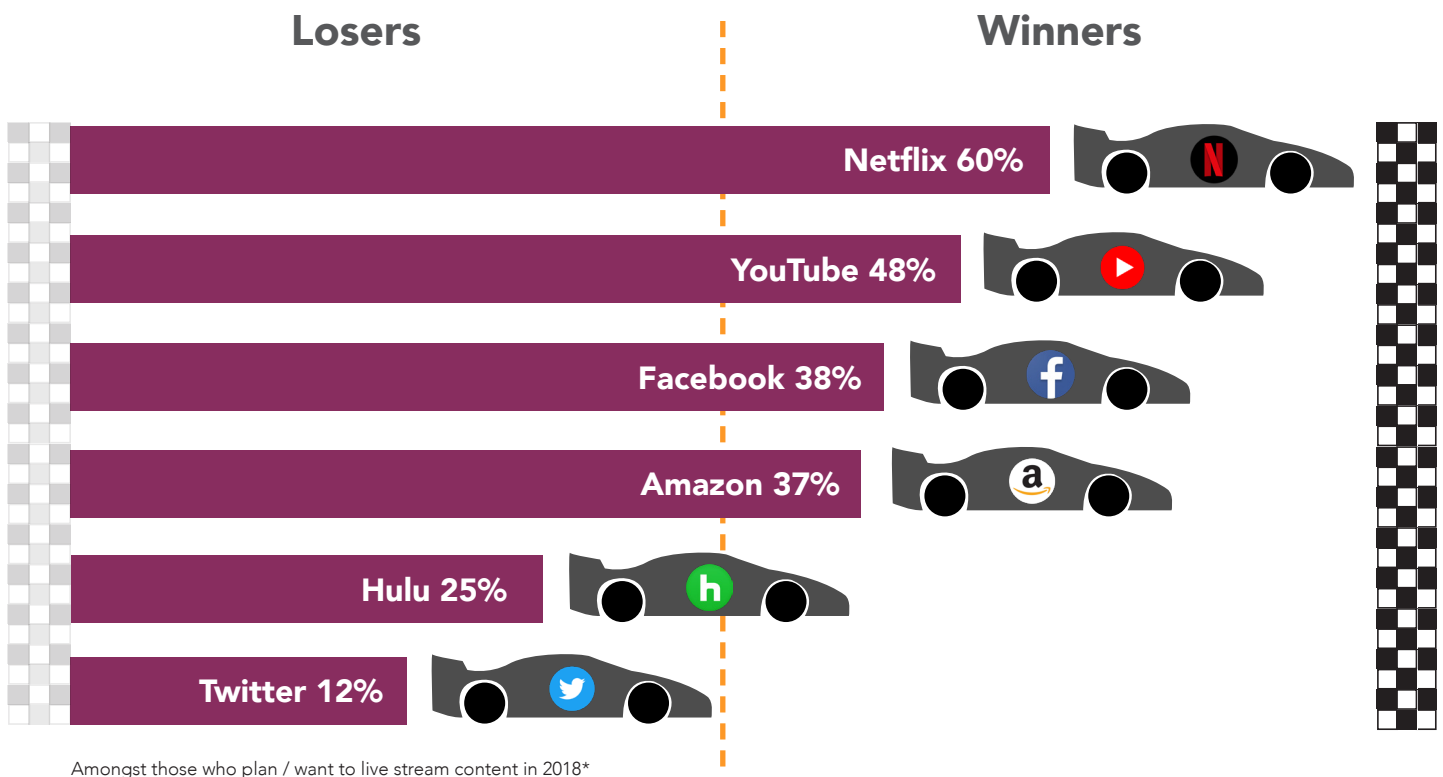
Nearly **one in six** (15%) wish their content was all on the same platform



Nearly **one in five** (18%) think there's too much content to keep up with

# THE WINNERS AND LOSERS IN LIVE STREAMING

Consumers have strong opinions about streaming platforms they either want to see offer true real-time content, as well as about ones that already offer it, but are performing poorly.



## LOOKING AHEAD AT 2018: CHALLENGES AND OPPORTUNITIES

2018 could be an exciting time in the streaming world if we achieve a real-time experience. Only then can we start looking to the future and investing in new types of streaming technologies:



**One in seven** (14%) would consider streaming in virtual reality headsets in 2018



**One in eight** (13%) would consider streaming in 360 viewing in 2018



**One in seven** (15%) would consider using 4K and enhanced resolutions for streaming in 2018

### METHODOLOGY

All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 1128 adults. Fieldwork was undertaken between 25th – 26th October 2017. The survey was carried out online. The figures have been weighted and are representative of all US adults (aged 18+)