



THE STREAMING WARS:

SPORTS REPORT

2017



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FOREWORD

The fundamental shift from traditional sports broadcasts to one fueled by new platforms, social media and mobile-first, multi-screen strategies won't be complete until the industry figures out how to overcome one major flaw – managing a latency-free, real-time stream at scale.

The live streaming experience is broken, particularly in the sporting arena, where latency issues abound. The industry must address the frustrating issues, such as buffering, delays, poor picture quality, loss of service, etc. plaguing everyone's experience, from the NFL to UFC.

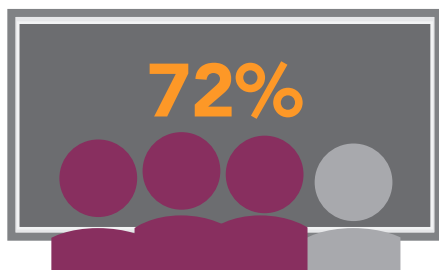
In our "Sports Report," it was obvious consumers understand they're paying for services that don't always meet their expectations. In fact, nearly three-quarters of sports viewers expect there will be an issue during their sports live stream! It's understandable then that 63 percent don't plan on signing up for a streaming sports service in 2018 and more than one in three (34 percent) would think about cancelling a service that was giving them an issue.

At the end of the day, this signals the potential for a genuine bottom line impact on the companies and organizations looking to capitalize on the future of streaming sports. Correcting course means implementing end-to-end technology that provides an optimal, true real-time streaming experience that works at scale. Otherwise, these issues will continue to wreak havoc on the industry and impact revenue for platforms that rely on such a passionate user base like the sports fan.

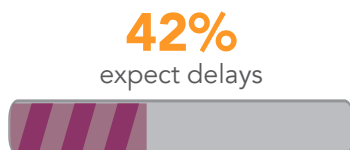
The upside we found was that if this main challenge can be overcome, there is incredible opportunity to offer more than just real-time streams to the customer. More than one in three want to simultaneously gain insights into player stats and information, and stream more than one game on different devices, respectively. If latency at broadcast scale is resolved, the streaming experience will be bigger and better than we could have imagined.

¹ Full list of responses on page three

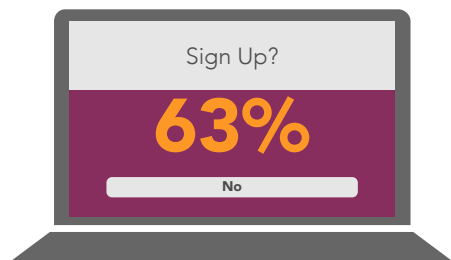
THE SAD STATE OF THE SPORTS LIVE STREAM



Sports viewers have come to expect bad service – **nearly three-quarters (72 percent)** anticipate a latency issue while they watch a game.

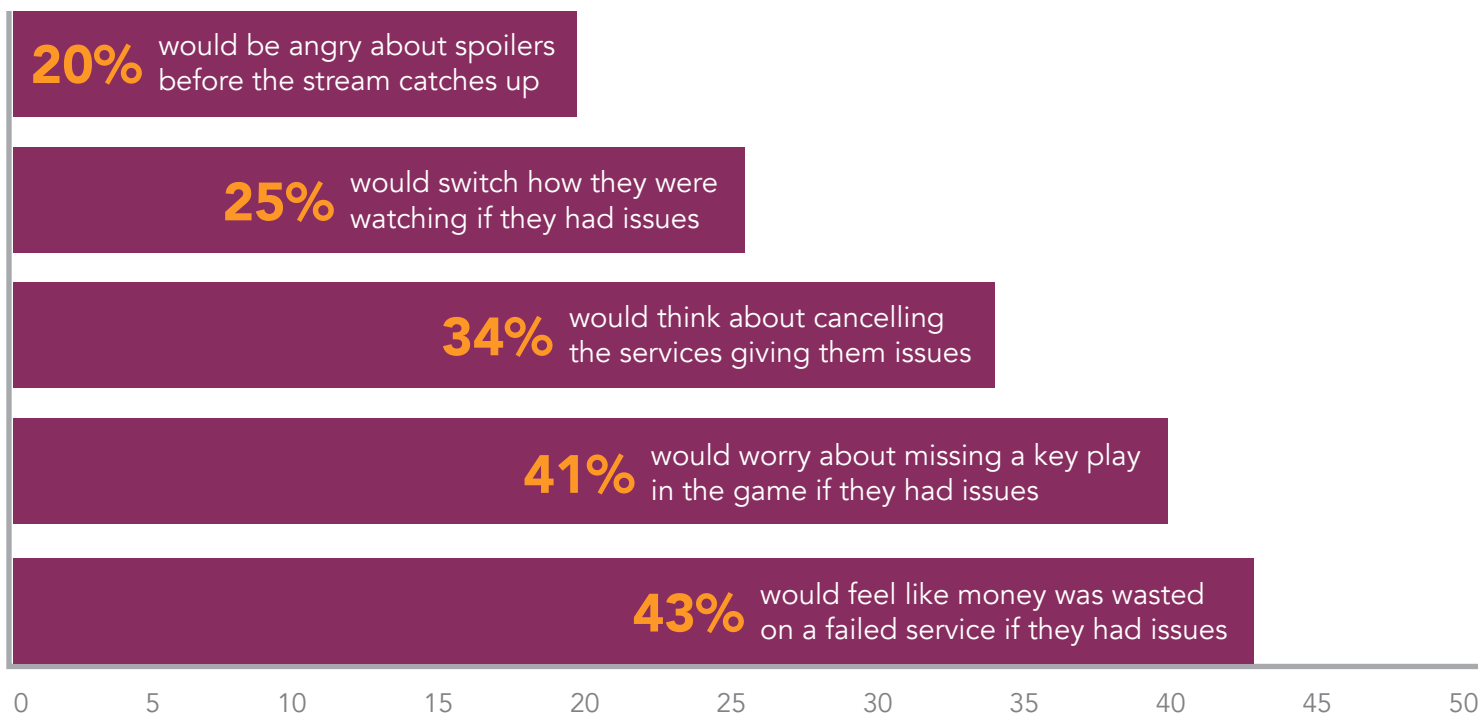


THE BUSINESS IMPACT



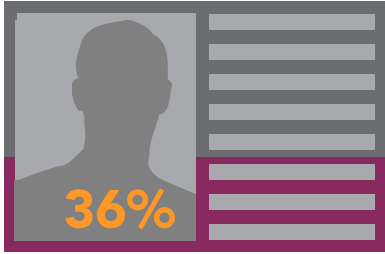
63 percent of sports watchers are reluctant to sign up or re-subscribe to sports live streaming platforms in 2018 and **more than one in three (34 percent)** would think about cancelling the services giving them issues. The impact of latency on a business cannot be understated.

The evolution of consumer concerns due to latency issues



LOOKING AHEAD

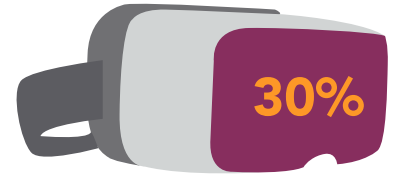
With a number of high profile sporting events on the horizon (more than **1 in 3, 36 percent**, of sports watchers anticipate issues streaming this year's Super Bowl) there's ample opportunity for the streaming industry to not only solve the latency issues it faces, but use real-time capabilities to elevate the sports fan's overall experience. Here's what sports watchers want out of the modern game time streaming experience.



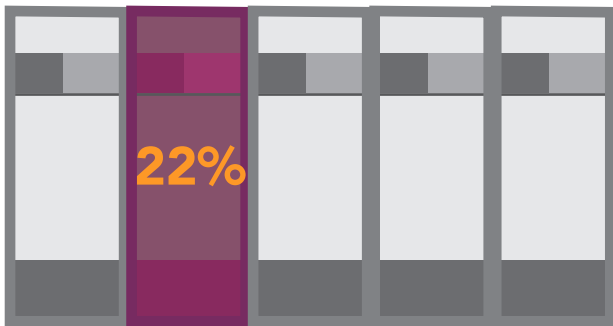
More than 1 in 3 (36 percent) want to gain insights into player stats and information



More than 1 in 3 (36 percent) want to stream more than one game on different devices, demonstrating the proliferation of the multi-screen experience



Nearly 1 in 3 (30 percent) want the ability to watch in virtual reality (VR) to view the game from different angles



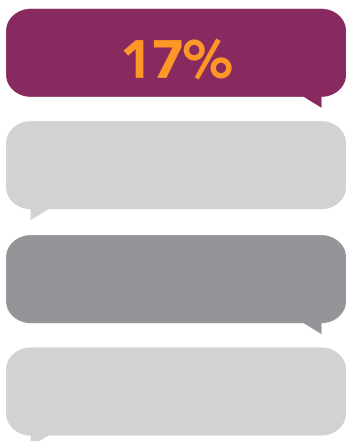
More than 1 in 5 (22 percent) want to see updates from the locker room/sidelines



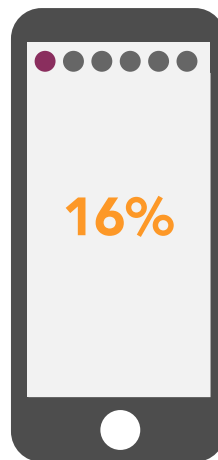
More than 1 in 5 (21 percent) want to feel like they're a journalist and have an insider view into press conferences



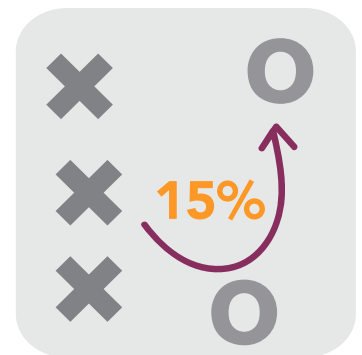
1 in 5 (21 percent) want to talk to/interact with players and coaches in real-time



17 percent want to engage with other viewers



16 percent want access to exclusive social media "stories"



15 percent want to be able to participate in score/play predictions

METHODOLOGY

All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 2309 adults. Fieldwork was undertaken between 12th - 16th October 2017. The survey was carried out online. The figures have been weighted and are representative of all US adults (aged 18+).