

THE STATE OF ONLINE VIDEO 2020

The State of Online Video is Limelight Networks' latest report in a series that explore consumer perceptions and behaviors around online video



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OVERVIEW

Limelight's State of Online Video 2020 research report highlights the latest findings in an ongoing series of consumer surveys about online viewing habits and opinions. This report is based on 5,000 responses from consumers in France, Germany, India, Indonesia, Italy, Japan, Singapore, South Korea, the United Kingdom, and the United States, ages 18 and older, who watch one hour or more of online video content each week.

Highlights of findings include:

- Online video continues to rapidly grow in popularity at the expense of traditional broadcast viewing. On average, viewers spend nearly eight hours (seven hours, 55 minutes) per week watching various types of content. Average viewing time has grown substantially this year with an average of 7.91 hours, up 16 percent over last year's average of 6.8 hours and up 85 percent since 2016's results of 4.28 average online video hours.
- While online video consumption has increased across all age groups, adoption has accelerated in older demographics, where the largest increases are seen in people over 46 years old.
- TV shows are the most popular category of online video content with an average of 4.6 hours a week consumed globally closely followed by movies with an average of 4.5 hours per week. Both types of content saw large growth in the past year of 48 percent from an average of 3.1 hours of TV shows per week, and 22 percent from 3.7 hours of movies per week.
- User generated content such as videos on social media significantly increased in popularity, doubling over the past year to four hours per week. When viewers were asked which video platform they use the most to watch user generated content, 65 percent answered with YouTube, with runner-up Facebook far behind.
- The popularity of Subscription Video on Demand (SVOD) services continues, jumping 50 percent since 2018. The highest rate is in the U.S., where viewers subscribe to an average of just over 2 services. The lowest rate is in Japan, where viewers have an average of 0.82 services.
- Nearly half of people globally (47 percent) added streaming services over the past six months. When asked the reason for adding a subscription, 40 percent of respondents cited spending more time at home as the largest reason.
- Price can be the deal breaker. Just under half (47 percent) of global consumers surveyed said price was the primary reason they would cancel a SVOD service. Lacking content they want to watch was the next most cited reason.
- Video rebuffering (when the video pauses during playback so it can reload) remains the most frustrating aspect of online viewing according to 44 percent of people. Viewers expect high quality online experiences, especially younger viewers who report the highest expectations.
- Latency matters. 64 percent report being more likely to watch live events online if the stream is not delayed from the broadcast.
- Over a third of people, (37 percent), share streaming account login information for SVOD services. Account sharing is least prevalent in Japan, South Korea, Singapore and the U.S.
- Broad content providers such as Netflix and Amazon Prime outpace specialized content and sports providers by more than double the average weekly viewing hours.

KEY FINDINGS

ONLINE VIDEO CONSUMPTION IS GROWING

Globally, people who watch online video spend nearly eight hours (seven hours, 55 minutes) per week watching various types of content. Average viewing time has grown substantially each year, up 16 percent over last year's average of 6.8 hours of video content per week and up 85 percent since 2016's average of four hours and 16 minutes per week.

Average Online Viewing Time

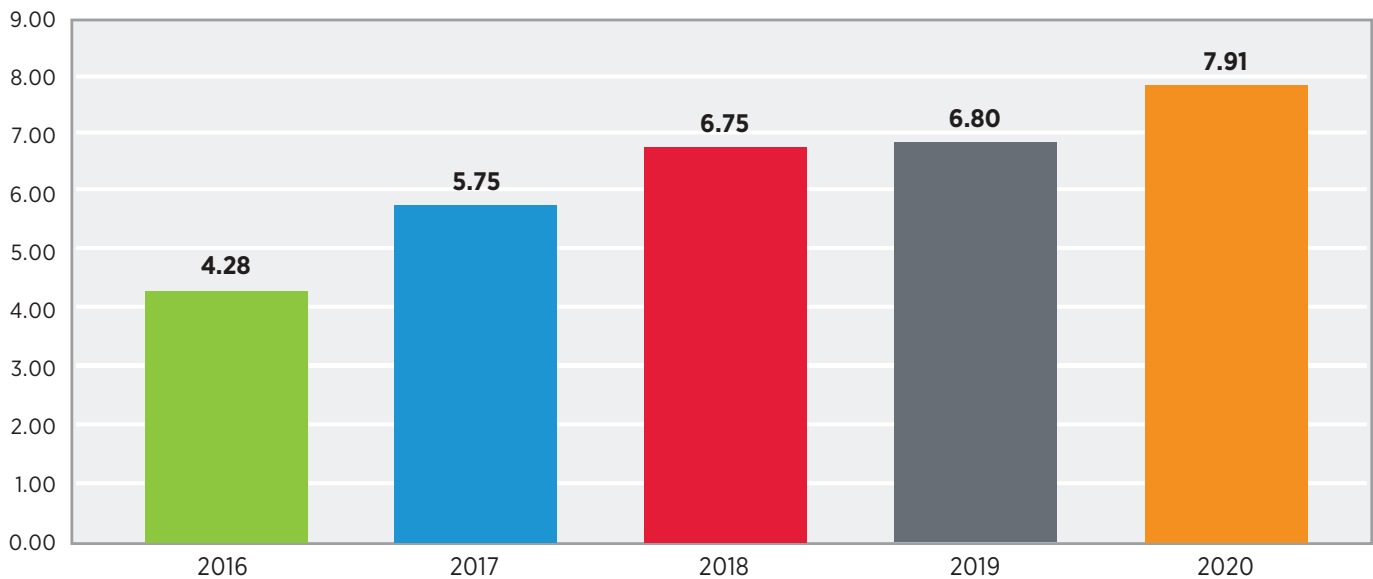


Figure 1: How many total hours of video content do you watch online each week?

39 percent of viewers watch between one to four hours and 43 percent watch more than seven hours of online video each week.

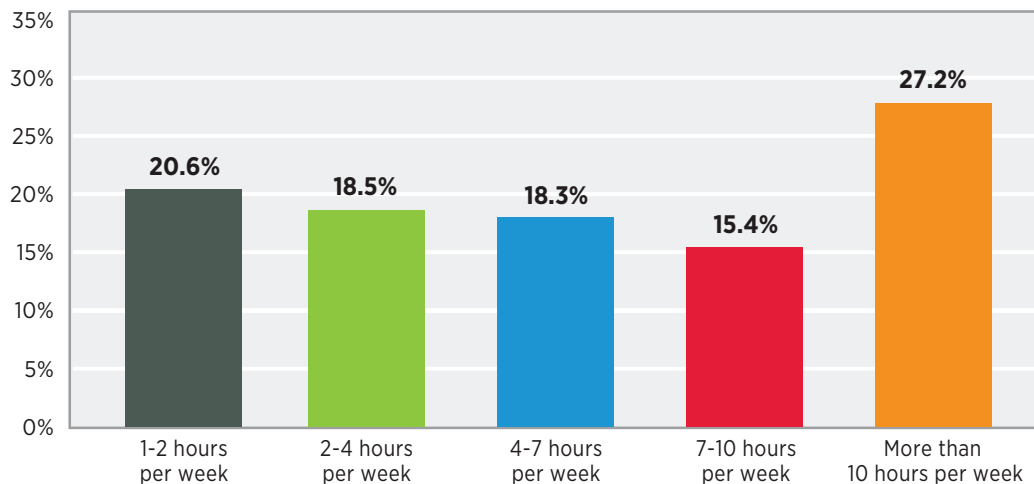


Figure 2: How many total hours of video content do you watch online each week?

Viewers in India watch the most online video each week at an average of 10 hours, 54 minutes, followed by viewers in Indonesia. In the last year viewing increased the most in Japan, with a 50 percent increase, and only two countries saw a decrease – Italy and South Korea.

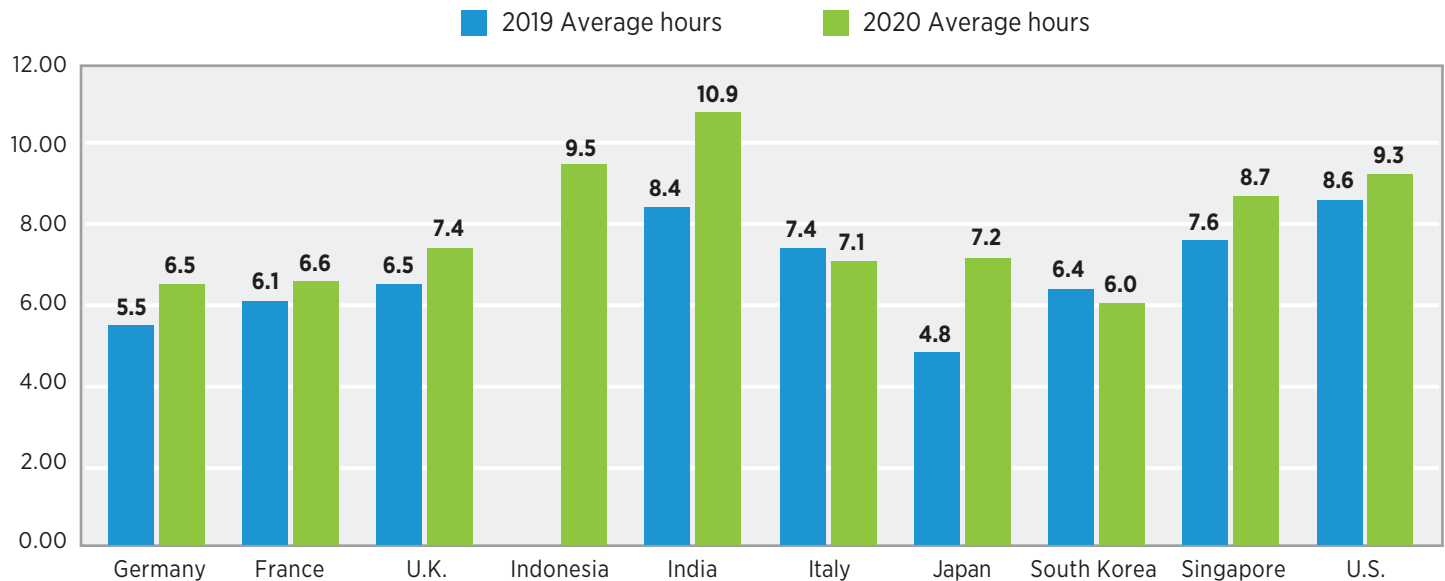


Figure 3: How many total hours of video content do you watch online each week?

The percentage of people watching online video over four hours each week increased from 53 percent in 2019 to 61 percent in 2020.

Age	1-2 hours per week	2-4 hours per week	4-7 hours per week	7-10 hours per week	10-20 hours per week	More than 20 hours per week
18-25	10.6%	19.3%	18.2%	18.0%	17.3%	16.6%
26-35	15.3%	16.0%	21.0%	18.0%	14.9%	14.9%
36-45	16.5%	19.0%	18.8%	17.1%	14.2%	14.4%
46-60	26.4%	19.3%	18.3%	13.7%	12.9%	9.4%
61-99	27.3%	18.6%	15.7%	12.2%	12.8%	13.3%
All Ages	20.6%	18.5%	18.3%	15.4%	14.1%	13.1%

Figure 4: How many total hours of video content do you watch online each week?

While online video consumption has increased across all age groups, adoption has accelerated in older demographics, where the largest increases were seen in people 46-60 at 21 percent and 42 percent for those 61-99.

Average Online Video Hours by Age

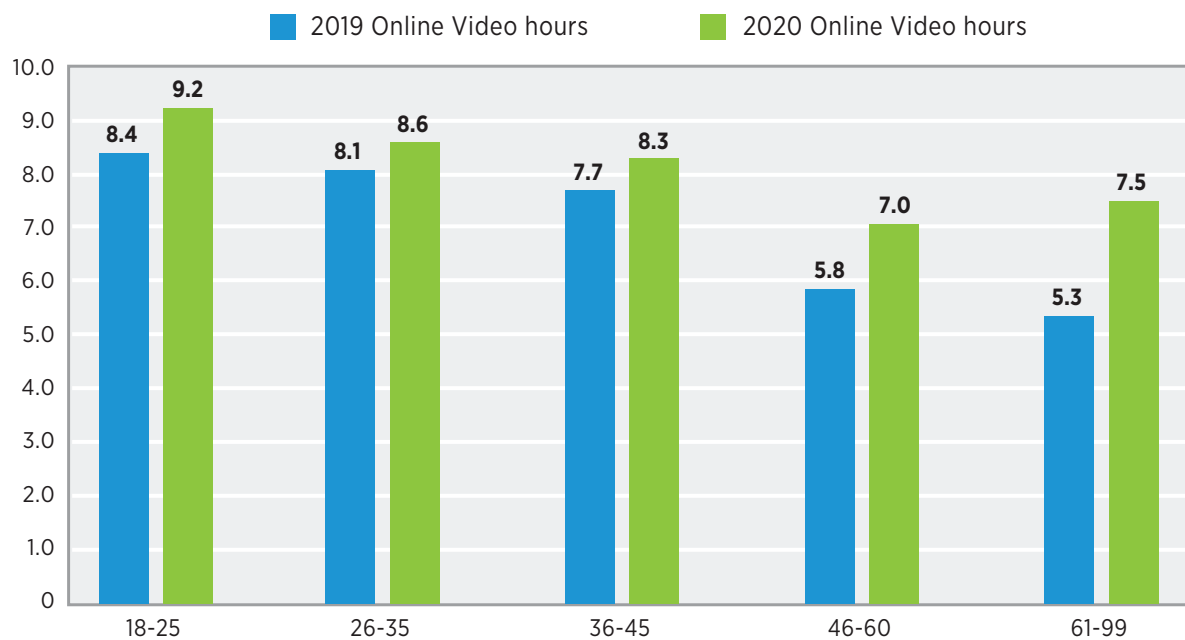


Figure 5: How many total hours of video content do you watch online each week?

BROADCAST VIDEO VIEWING

Taking a look at how many hours of video on broadcast, cable, or satellite TV are watched each week, for the first time, online video consumption now exceeds traditional broadcast viewing. The increase is dramatic in India and Singapore. The regions bucking this trend are the UK, Germany and South Korea with Italy and Japan virtually equal.

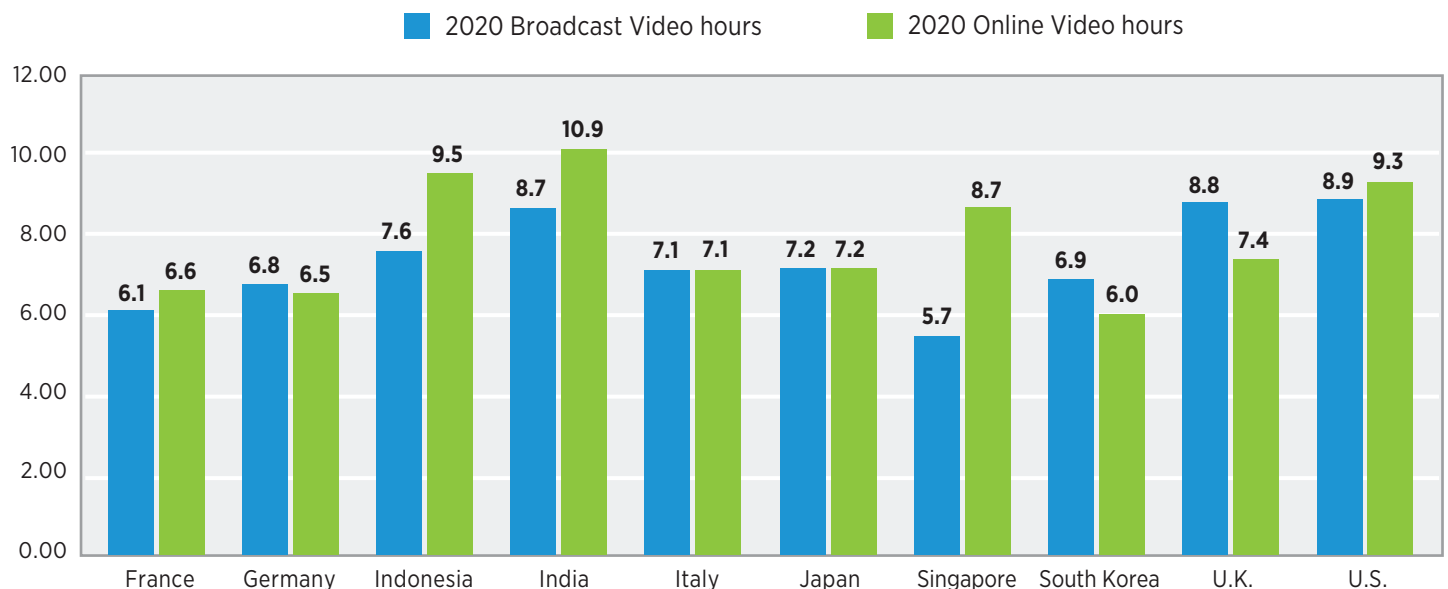


Figure 6: How many total hours of video do you watch each week?

The U.S. had the highest level of traditional broadcast television viewing at eight hours and 55 minutes per week. Singapore had the highest rate of online viewers who do not watch traditional broadcast television at 18 percent.

Country	I do not watch broadcast, cable, or satellite TV	1-2 hours per week	2-4 hours per week	4-7 hours per week	7-10 hours per week	10-20 hours per week	More than 20 hours per week	Average hours per week
Germany	10.0%	17.9%	17.7%	17.5%	14.1%	13.7%	9.2%	6.82
France	7.8%	14.8%	25.5%	23.3%	11.2%	10.6%	6.8%	6.12
United Kingdom	6.2%	10.2%	14.4%	18.4%	18.4%	14.0%	18.4%	8.77
Indonesia	9.6%	17.2%	15.2%	15.6%	13.0%	12.6%	16.8%	7.64
India	3.0%	8.8%	19.6%	17.4%	20.0%	16.6%	14.6%	8.72
Italy	4.0%	14.8%	18.2%	21.0%	19.8%	14.0%	8.2%	7.06
Japan	9.6%	18.4%	14.6%	18.0%	12.6%	13.0%	13.8%	7.22
South Korea	6.0%	19.6%	17.8%	20.4%	14.6%	12.4%	9.2%	6.86
Singapore	18.0%	14.8%	17.6%	18.0%	15.2%	8.4%	8.0%	5.70
United States	12.2%	10.0%	11.8%	16.0%	13.2%	19.2%	17.6%	8.91
Global	8.7%	14.7%	17.2%	18.6%	15.2%	13.5%	12.3%	7.38

Figure 7: How many total hours of video content do you watch on broadcast, cable, or satellite TV each week?

Older viewers watch more traditional broadcast television than younger ones, with those age 61 and older watching at least an hour more per week than those 18-35.

Age	I do not watch broadcast, cable, or satellite TV	1-2 hours per week	2-4 hours per week	4-7 hours per week	7-10 hours per week	10-20 hours per week	More than 20 hours per week	Average hours per week
18-25	11.3%	14.5%	20.9%	20.1%	15.0%	9.5%	8.7%	6.22
26-35	7.1%	15.8%	17.7%	20.1%	17.7%	11.8%	9.9%	6.96
36-45	6.3%	12.9%	16.8%	20.8%	17.7%	13.5%	12.0%	7.93
46-60	9.2%	14.9%	17.0%	19.1%	13.8%	14.8%	11.1%	7.18
61-99	9.4%	15.0%	15.1%	13.4%	13.0%	15.6%	18.5%	8.40
All Ages	8.7%	14.7%	17.2%	18.6%	15.2%	13.5%	12.3%	7.38

Figure 8: How many total hours of video content do you watch on broadcast, cable, or satellite TV each week?

Respondents that are over age 45 watch more broadcast TV, while those ages 45 and younger are more online biased.

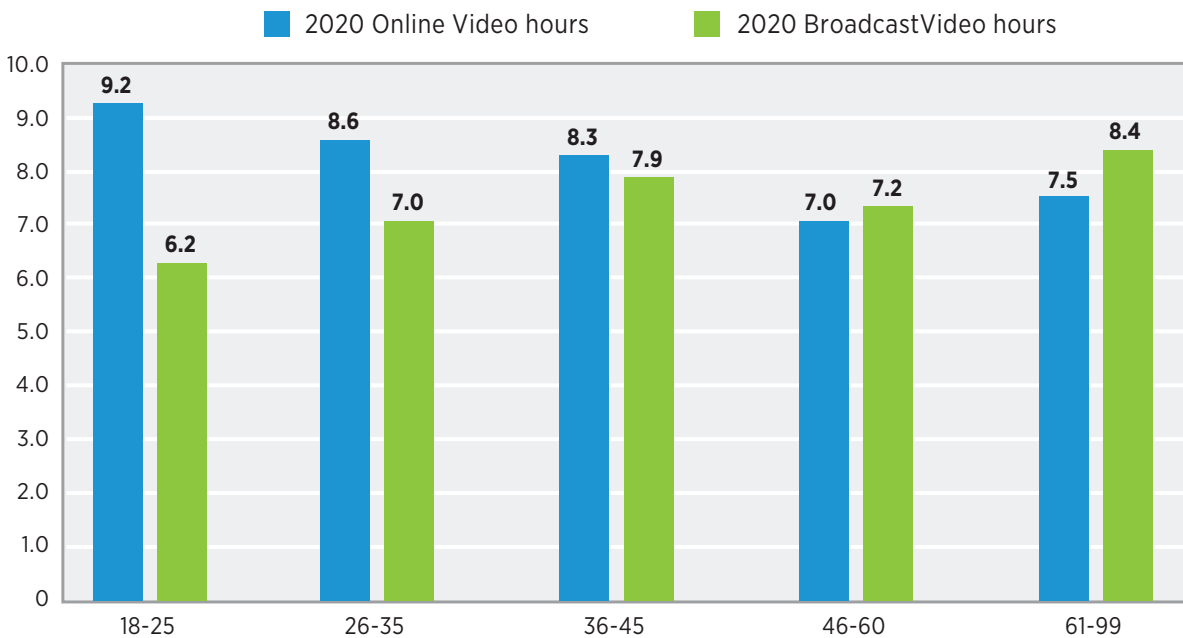


Figure 9: How many total hours of video content do you watch online and on broadcast, cable, or satellite TV each week?

TV SHOWS AND MOVIES ARE THE MOST POPULAR CONTENT

TV shows are the most popular category of online video content followed by movies. The third most popular online video category is user generated content such as social media videos, which had a significant jump this year.

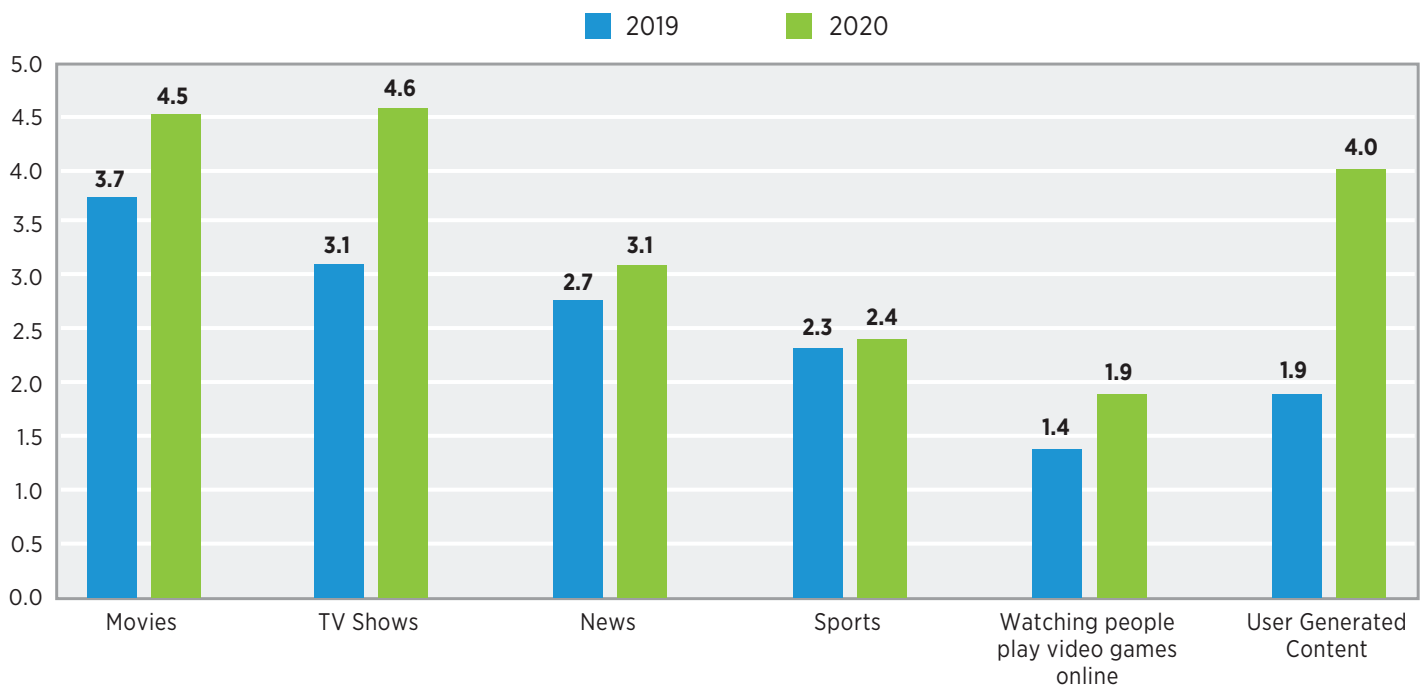


Figure 10: How much of your online video viewing time in hours is spent watching the following types of content each week?

Movies are the most commonly watched content in France, Italy, India, and Singapore. Germany and Indonesia prefer social media user generated content. TV shows are most popular in South Korea, the U.K., Japan, and the U.S. Professionally produced content on social media sites and user-generated content have their highest viewership in India, and Indonesia.

Country	Movies hours	TV Shows hours	News hours	Sports hours	Watching other people play video games hours	Online chat/video conferencing hours	Online learning hours	Social media/user generated content hours
Germany	2.9	2.2	2.3	1.8	1.6	1.5	1.3	3.3
France	4.1	3.1	3.0	2.3	2.0	2.0	2.0	3.6
U.K.	4.2	5.1	2.3	2.2	1.4	1.9	1.7	3.0
Indonesia	6.6	5.3	4.6	4.4	3.8	4.3	4.3	6.7
India	7.2	5.7	4.1	3.3	3.4	3.7	4.0	5.7
Italy	5.6	4.4	3.0	2.4	1.2	1.8	1.8	3.5
Japan	2.2	5.2	2.6	1.6	1.0	0.9	0.8	2.8
South Korea	3.1	5.0	2.9	2.0	1.9	1.4	1.8	3.8
Singapore	4.4	4.2	2.9	1.5	1.2	2.4	2.0	4.0
U.S.	4.6	5.8	2.9	2.2	1.6	2.1	2.0	3.7
Global	4.5	4.6	3.1	2.4	1.9	2.2	2.2	4.0

Figure 11: How much of your online video viewing time is spent in hours watching the following types of content each week?

People in Japan and South Korea are the least likely to use online video for communication and those in India and Indonesia are the most likely.

Country	None	1-2 hours	2-4 hours	4-7 hours	7-10 hours	10-20 hours	More than 20 hours
Germany	60.8%	19.9%	9.2%	5.2%	2.6%	1.0%	1.2%
France	50.5%	23.3%	13.4%	6.6%	2.8%	1.4%	2.0%
U.K.	43.0%	33.8%	10.6%	7.0%	3.0%	1.6%	1.0%
Indonesia	17.2%	39.0%	18.6%	8.0%	4.8%	3.0%	9.4%
India	17.0%	36.6%	17.4%	13.8%	7.8%	4.8%	2.6%
Italy	46.2%	29.8%	12.0%	7.2%	2.4%	1.0%	1.4%
Japan	75.2%	13.0%	6.0%	3.2%	1.4%	0.8%	0.4%
South Korea	62.8%	21.4%	7.2%	3.4%	2.6%	1.8%	0.8%
Singapore	33.0%	35.4%	16.6%	8.4%	3.4%	1.4%	1.8%
U.S.	49.6%	22.8%	12.4%	9.4%	2.0%	1.4%	2.4%
Global	45.5%	27.5%	12.4%	7.2%	3.3%	1.8%	2.3%

Figure 12: How much of your online video viewing time is spent with online chat/video conferencing (such as Zoom, MS Teams, Facetime) each week?

The time spent learning with online video varies significantly across countries. Less than 20 percent of people in Japan participate, while over 80 percent of people in India and Indonesia spend time learning online.

Country	None	1-2 hours	2-4 hours	4-7 hours	7-10 hours	10-20 hours	More than 20 hours
Germany	63.5%	19.7%	8.8%	3.4%	2.8%	1.0%	0.8%
France	50.3%	22.7%	10.8%	10.2%	2.4%	2.2%	1.4%
U.K.	58.6%	20.0%	9.6%	4.6%	4.4%	2.0%	0.8%
Indonesia	19.2%	36.6%	18.2%	9.4%	4.2%	3.0%	9.4%
India	18.4%	31.0%	22.2%	10.8%	9.0%	4.0%	4.6%
Italy	48.8%	27.6%	11.2%	6.6%	3.2%	1.2%	1.4%
Japan	81.4%	9.2%	3.2%	2.6%	2.0%	1.4%	0.2%
South Korea	51.2%	24.4%	12.4%	7.0%	2.4%	1.6%	1.0%
Singapore	43.6%	30.4%	12.8%	8.0%	2.4%	1.8%	1.0%
U.S.	56.2%	19.2%	10.8%	5.4%	3.6%	4.0%	0.8%
Global	49.1%	24.1%	12.0%	6.8%	3.6%	2.2%	2.1%

Figure 13: How much of your online video viewing time is spent with online learning each week?

Online video content preference varies significantly by age. People 18-25 spend more time engaging in watching others play video games, online chat, learning and social media than other age groups. Those over 60 watch more news, and spend about the same amount of time viewing sports as people under 46. News is viewed the least by respondents ages 18-35.

Age	Movies hours	TV Shows hours	News hours	Sports hours	Watching other people play video games hours	Online chat/video conferencing hours	Online learning hours	Social media/user generated content hours
18 - 25	5.3	4.6	2.8	2.6	3.4	3.1	3.4	6.0
26 - 35	5.1	4.8	2.8	2.5	2.5	2.7	2.7	4.7
36 - 45	4.8	4.7	3.1	2.5	2.0	2.3	2.2	4.1
46 - 60	3.9	4.2	2.9	2.0	1.0	1.6	1.6	3.2
61 - 99	3.9	4.9	3.6	2.5	1.5	1.9	1.7	3.2
All Ages	4.5	4.6	3.1	2.4	1.9	2.2	2.2	4.0

Figure 14: How much of your online video viewing time is spent in hours watching the following types of content?

Men view, on average, one more hour of sports and 36 more minutes of watching people play video games than women. Women watch on average 24 more minutes of TV shows and user-generated content on social media sites.

Gender	Movies hours	TV Shows hours	News hours	Sports hours	Watching other people play video games hours	Online chat/video conferencing hours	Online learning hours	Social media/user generated content hours
Female	4.4	4.8	3.0	1.9	1.7	2.2	2.2	4.2
Male	4.6	4.4	3.1	2.9	2.1	2.1	2.1	3.8
All	4.5	4.6	3.1	2.4	1.9	2.2	2.2	4.0

Figure 15: How much of your online video viewing time is spent watching the following types of content?

THE NUMBER OF SUBSCRIPTIONS TO SVOD SERVICES HAS JUMPED 50 PERCENT SINCE 2018

The popularity of Subscription Video on Demand (SVOD) services continues. In 2018 the global average was one service, increasing to one and a half services in 2020, a 50 percent jump. The highest rate is in the U.S., where viewers have subscribed to an average of just over two services in 2020. The lowest rate is in Japan, where viewers have subscribed to an average of 0.8 services.

How many paid online streaming video services (ie, Netflix, Amazon Prime, etc.) do you currently subscribe to?			
Country	2018	2019	2020
Germany	0.9	1.1	1.4
France	0.6	1.1	1.6
U.K.	1.0	1.3	1.6
Indonesia			1.7
India	1.4	1.6	2.0
Italy	1.0	1.3	1.6
Japan	0.8	0.9	0.8
South Korea	1.0	1.1	1.0
Singapore	0.7	0.9	1.1
U.S.	1.6	1.7	2.2
Global	1.0	1.2	1.5

Figure 16: How many paid online streaming video services (i.e., Netflix, Amazon Prime, etc.) do you currently subscribe to? (by country)

Viewers between the ages of 18-45 are more likely to subscribe to SVOD services than older viewers.

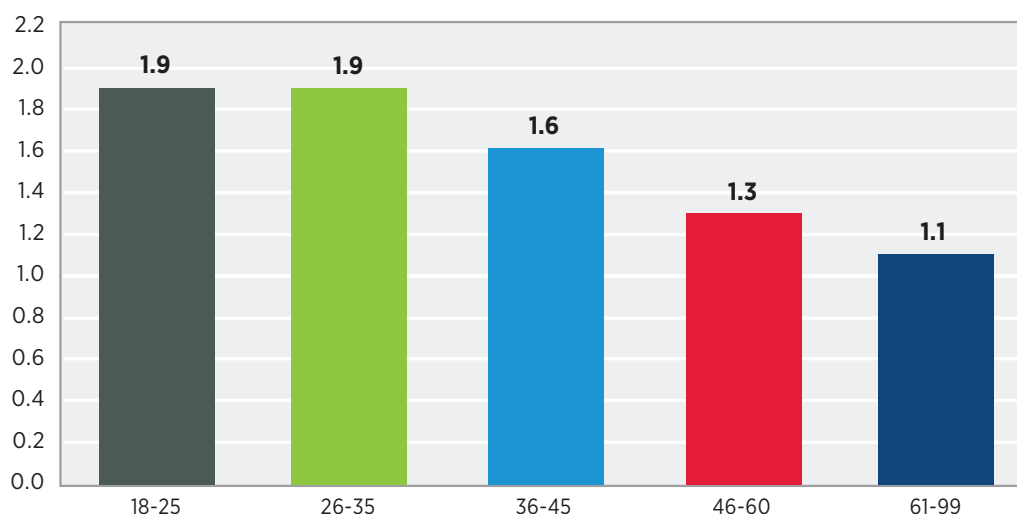


Figure 17: How many paid online streaming video services (i.e., Netflix, Amazon Prime, etc.) do you currently subscribe to? (by age)

NEARLY HALF OF GLOBAL VIEWERS SUBSCRIBED TO NEW SERVICES DURING THE FIRST HALF OF 2020

Almost half of people globally have subscribed to additional streaming services in the past six months. Over 53 percent of viewers in France have subscribed to new streaming services, which is the highest of the European countries surveyed.

Country	No	Yes
Germany	65.7%	34.3%
France	46.1%	53.9%
U.K.	54.5%	45.5%
Indonesia	28.4%	71.6%
India	30.2%	69.8%
Italy	53.8%	46.2%
Japan	78.4%	21.6%
South Korea	60.5%	39.5%
Singapore	60.6%	39.4%
U.S.	54.7%	45.3%
Global	53.3%	46.7%

Figure 18: Did you subscribe to a new streaming service in the last six months?

Young people are more likely to adopt new streaming services than those that are older.

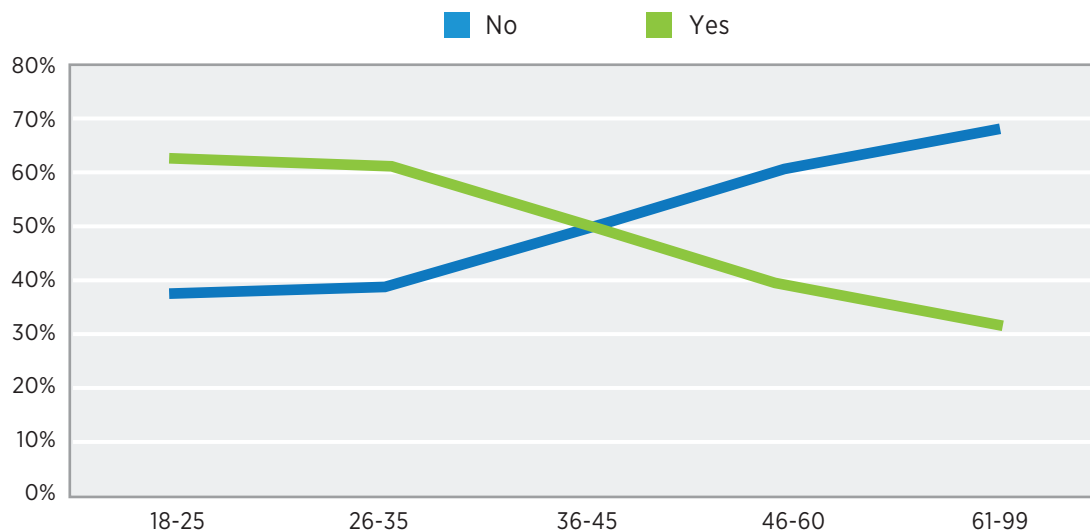


Figure 19: Did you subscribe to a new streaming service in the last six months?

SPENDING MORE TIME AT HOME IS THE PRIMARY REASON FOR SUBSCRIBING TO NEW STREAMING SERVICES

Globally, COVID-19 led to people subscribing to new streaming services as they spent more time at home. The availability of content they wanted to watch was the second most popular reason cited. South Korea was the only exception – the availability of content people wanted to watch was the primary reason.

Country	I wanted to switch to a new service from the one I have been using	There was content that I wanted to watch	There was a free trial campaign	My friends recommended it	I spend more time at home due to COVID-19
Germany	2.3%	28.3%	25.7%	10.6%	33.2%
France	7.2%	21.5%	17.9%	10.1%	43.3%
U.K.	2.0%	23.8%	21.2%	9.3%	43.6%
Indonesia	6.7%	22.2%	14.4%	13.3%	43.4%
India	7.4%	24.6%	13.7%	12.4%	41.8%
Italy	6.3%	23.0%	20.0%	8.1%	42.7%
Japan	3.3%	32.0%	26.1%	5.2%	33.3%
South Korea	4.1%	33.1%	14.7%	15.3%	32.8%
Singapore	6.1%	22.1%	20.4%	15.5%	35.9%
U.S.	3.4%	29.1%	20.7%	9.7%	37.2%
Global	5.4%	25.2%	18.2%	11.6%	39.7%

Figure 20: Why did you subscribe to a new online streaming service?

People over the age of 60 cited spending more time at home due to COVID-19 as the primary reason for subscribing to new streaming services more than any other age group.

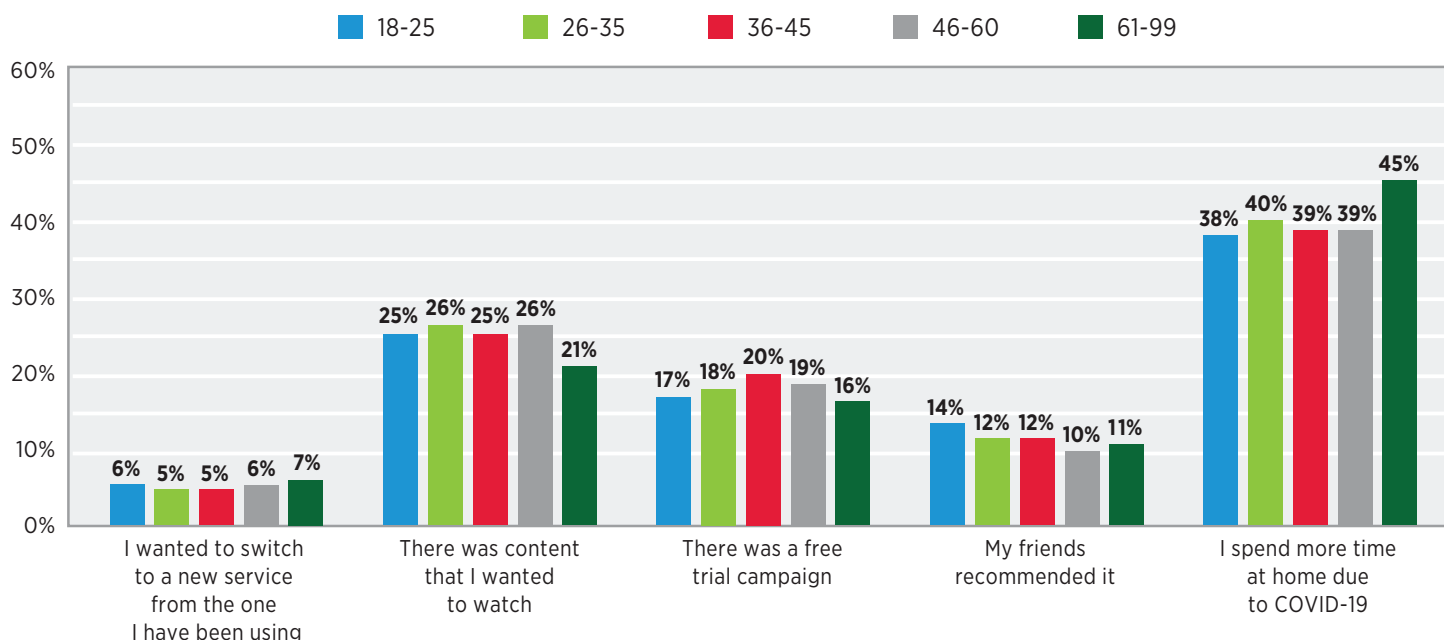


Figure 21: Why did you subscribe to a new online streaming service?

PRICE CONTINUES TO BE THE PRIMARY REASON FOR CANCELLING SUBSCRIPTIONS

Price remains the primary reason for canceling an online streaming service. However, this is eight percent lower than 2018, perhaps due to the increase in time spent at home and increase in viewing. Streaming services lacking content that interests subscribers jumped from 25 percent in 2019 to 30 percent this year as a reason people would cancel.

Country	It is too hard to find content I am looking for	The content available for viewing was not interesting to me	The price of the service became too expensive	The quality of the video playback was not good	The service doesn't support all of the devices I use for viewing
Germany	2.0%	34.4%	46.6%	13.2%	3.9%
France	8.6%	24.3%	41.2%	20.2%	5.7%
U.K.	4.8%	28.3%	53.8%	10.0%	3.0%
Indonesia	5.4%	36.9%	36.9%	14.5%	6.3%
India	8.7%	26.2%	45.7%	12.7%	6.8%
Italy	5.7%	28.8%	50.8%	9.5%	5.2%
Japan	10.3%	35.7%	42.5%	6.3%	5.2%
South Korea	13.5%	30.7%	40.9%	9.1%	5.9%
Singapore	6.1%	25.9%	55.5%	8.1%	4.5%
U.S.	8.2%	22.7%	54.6%	10.4%	4.0%
Global	7.3%	29.4%	46.9%	11.4%	5.1%

Figure 22: Which of the following is most likely to cause you to cancel your subscription to an online streaming service?

Price and content are consistent across age groups as the top reason to cancel subscriptions.

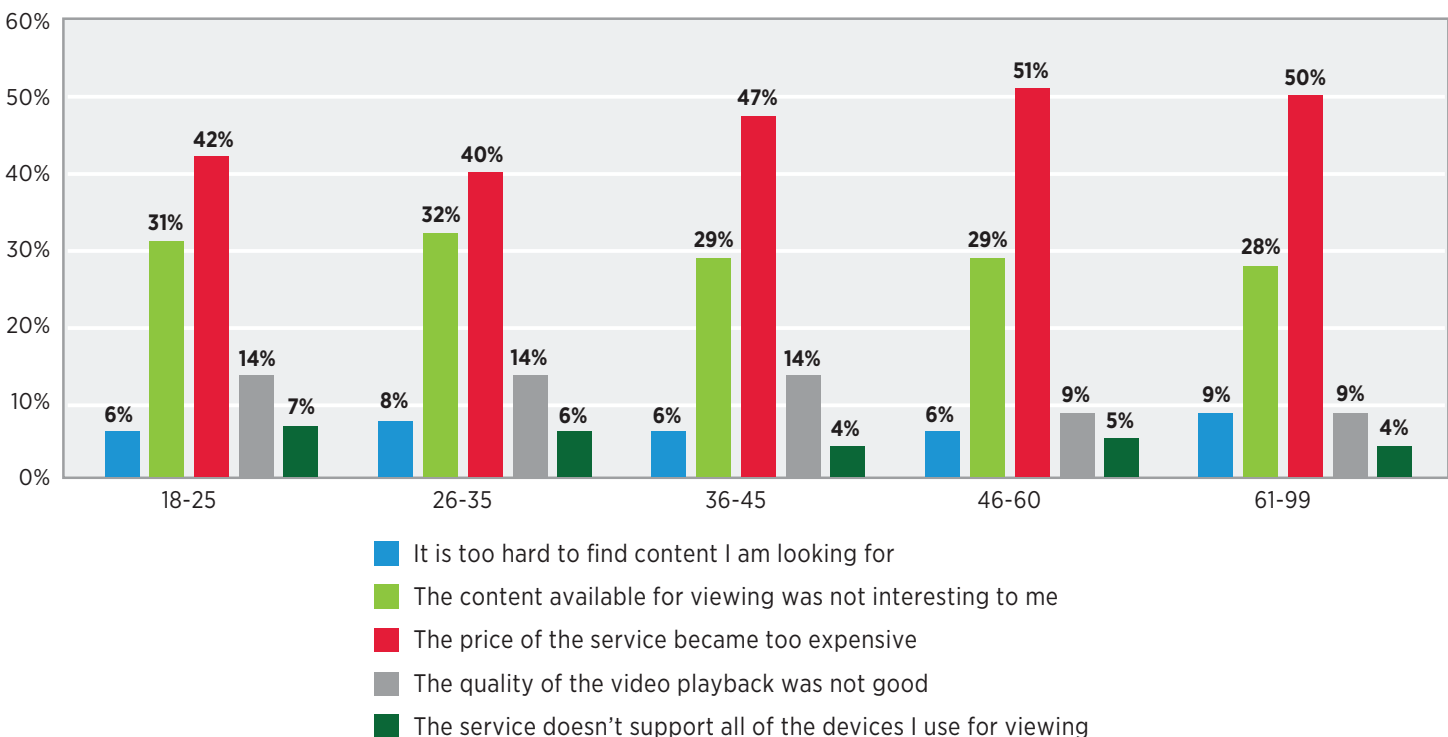


Figure 23: Which of the following is most likely to cause you to cancel your subscription to an online streaming service?

While price sensitivity is the primary reason to cancel online video subscriptions, its importance has decreased from 55 percent in 2018 to 47 percent this year.

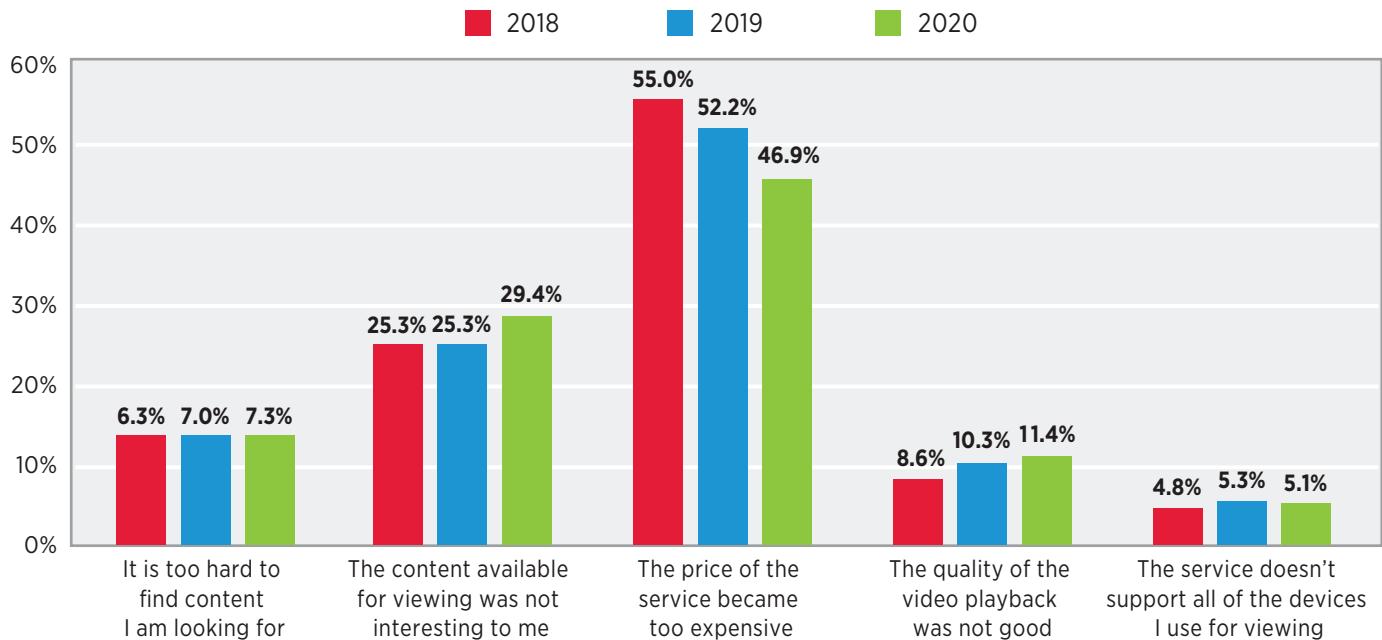


Figure 24: Which of the following is most likely to cause you to cancel your subscription to an online streaming service?

VIDEO REBUFFERING IS THE PRIMARY VIEWING FRUSTRATION

Video rebuffering (when the video pauses during playback so it can reload) remains the most frustrating aspect of online viewing. 44 percent of global consumers noted it as their primary issue with watching online video.

Respondents that found rebuffering to be the most frustrating aspect of online video			
Country	2018	2019	2020
France	34.4%	30.8%	34.7%
Germany	45.2%	48.3%	49.2%
India	46.0%	38.8%	41.9%
Italy	52.6%	51.6%	44.2%
Japan	32.2%	32.2%	31.5%
Singapore	46.4%	46.5%	49.6%
South Korea	36.0%	36.2%	51.8%
U.K.	49.0%	51.2%	50.2%
U.S.	49.4%	52.4%	47.6%
Global	43.4%	43.1%	43.8%

Figure 25: What is the most frustrating aspect of watching video online?

Older consumers have more tolerance for rebuffering than younger consumers.

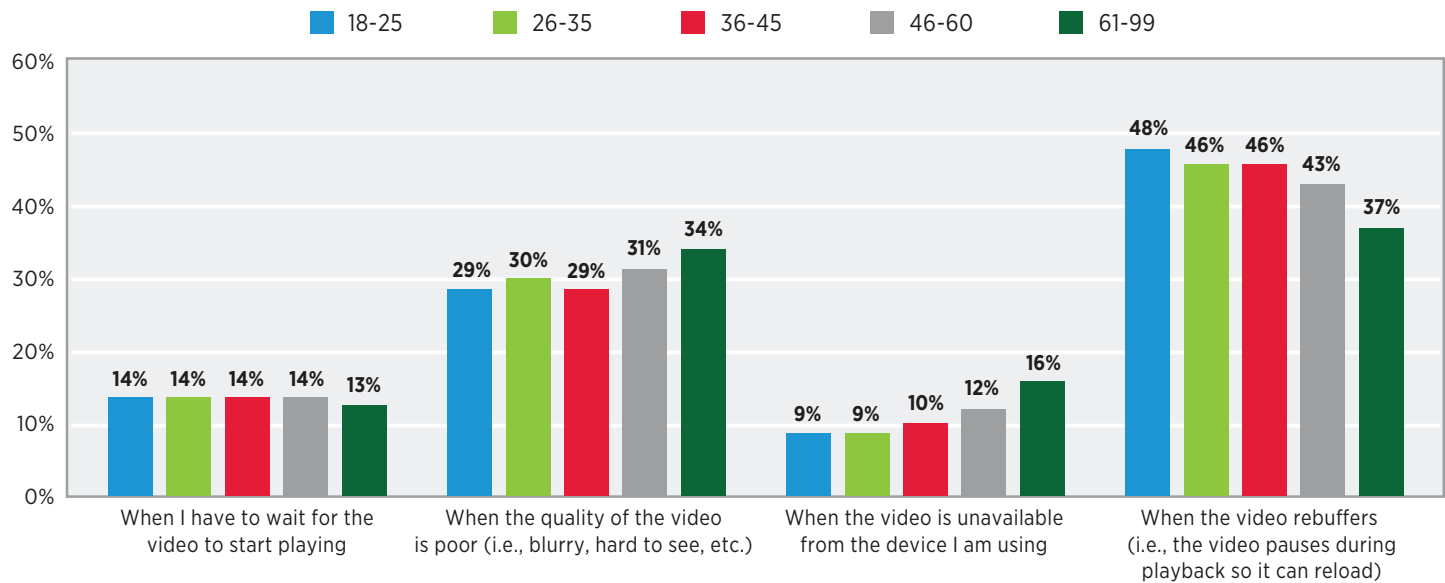


Figure 26: What is the most frustrating aspect of watching video online?

VIEWERS BINGE-WATCH FOR TWO AND A HALF HOURS AT A TIME

Binge watching continues to be popular. Viewers reported binge watching shows for an average of two hours, 30 minutes at a time. 30 percent watch for three hours or more at a time. Binge watching times are the longest in the US, where viewers watch an average of two hours and 54 minutes.

Country	I don't binge watch	Less than one hour	1-3 hours at a time	3-5 hours at a time	5-7 hours at a time	7-10 hours at a time	More than 10 hours at a time	Average Hours Binged
Germany	22.7%	13.2%	42.5%	15.6%	3.6%	1.4%	1.0%	2.0
France	14.3%	13.9%	40.4%	16.5%	8.6%	3.3%	3.1%	2.7
U.K.	17.3%	4.2%	43.6%	24.7%	5.8%	2.8%	1.6%	2.7
Indonesia	15.1%	14.1%	43.4%	13.7%	5.7%	5.9%	2.2%	2.6
India	14.1%	13.5%	39.0%	18.1%	8.5%	4.0%	2.8%	2.8
Italy	15.9%	12.5%	50.8%	14.1%	4.4%	1.2%	1.0%	2.2
Japan	25.4%	9.5%	33.9%	18.4%	5.7%	3.6%	3.6%	2.5
South Korea	7.7%	24.4%	46.0%	9.9%	6.3%	4.2%	1.6%	2.5
Singapore	20.0%	11.1%	38.7%	19.2%	7.3%	1.8%	1.8%	2.4
U.S.	18.5%	6.2%	35.5%	24.7%	9.0%	3.0%	3.0%	2.9
Global	17.1%	12.3%	41.4%	17.5%	6.5%	3.1%	2.2%	2.5

Figure 27: How long do you typically spend binge watching an online series in one sitting?

Binge watching is highest among younger viewers, with those aged between 18-35 watching an average of over three hours at a time, while those over 60 watched for just under two hours.

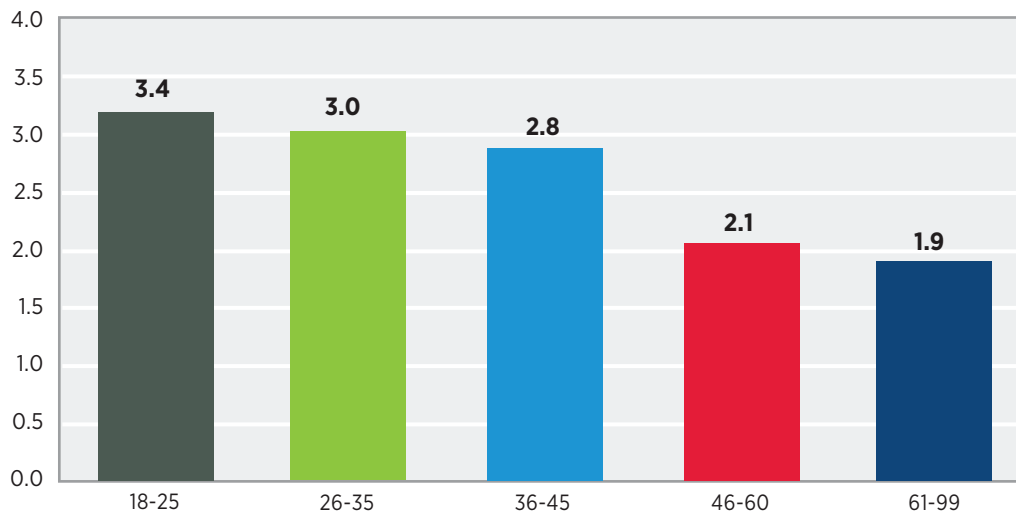


Figure 28: How long do you typically spend binge watching an online series in one sitting?

VIEWERS PREFER LOW LATENCY LIVE STREAMS

Most global viewers are more likely to stream a live event if it wasn't delayed from the TV broadcast. The exceptions are people in Germany and Japan.

Country	No	Yes
Germany	55.1%	44.9%
France	42.5%	57.6%
U.K.	35.3%	64.7%
Indonesia	17.1%	82.9%
India	19.5%	80.5%
Italy	23.0%	77.0%
Japan	58.5%	41.5%
South Korea	37.5%	62.5%
Singapore	34.4%	65.6%
U.S.	37.0%	63.1%
Global	36.0%	64.0%

Figure 29: Would you be more likely to stream a live event online if you knew it wasn't delayed from the TV broadcast?

Viewers under the age of 46 are more concerned about live video latency than those who are over 60.

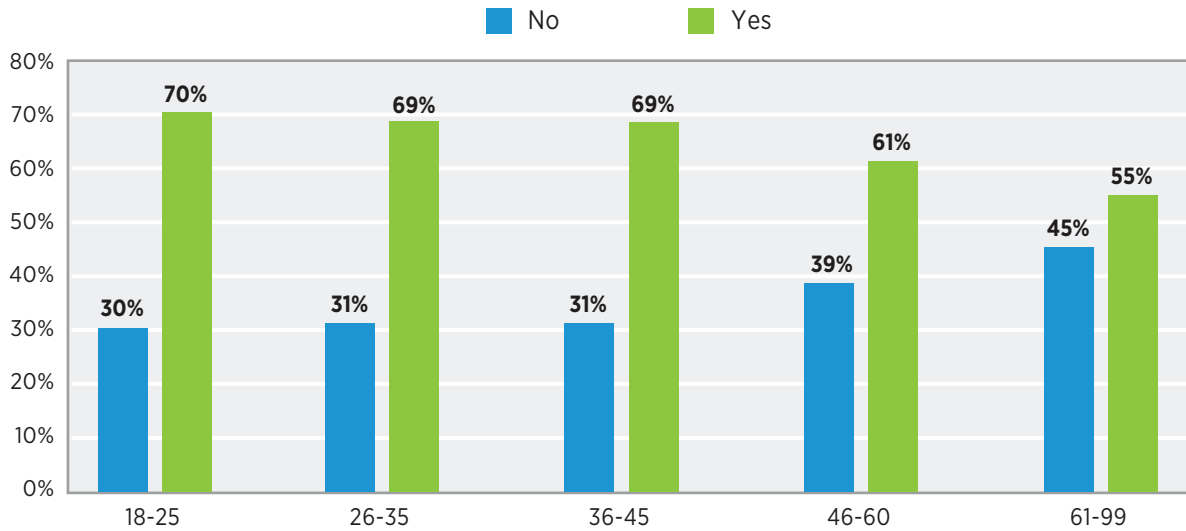


Figure 30: Would you be more likely to stream a live event online if you knew it wasn't delayed from the TV broadcast?

MORE THAN ONE THIRD OF PEOPLE GLOBALLY SHARE STREAMING ACCOUNT LOGIN INFORMATION

Sharing login information is most prevalent in Indonesia, India, and France, and least prevalent in Japan with 84 percent claiming they have never shared their own login information or used someone else's.

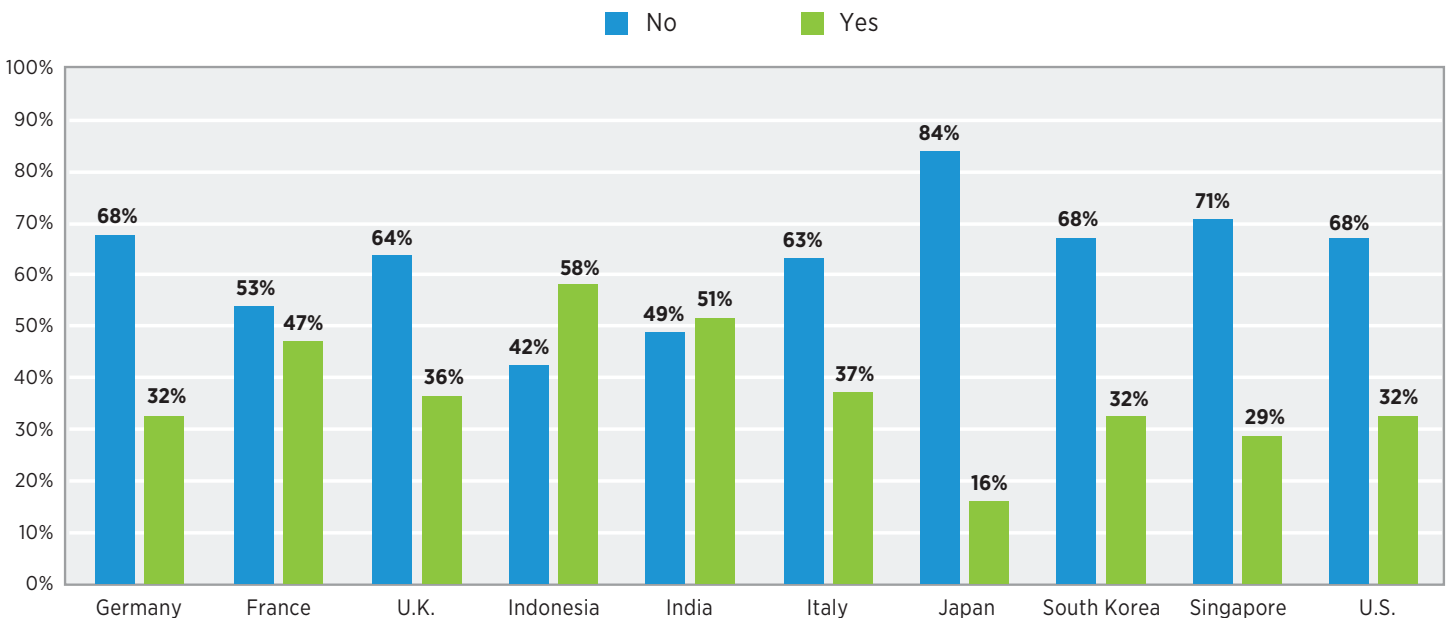


Figure 31: Have you ever shared your streaming account login information with others, or used someone else's login information?

Sharing account information is more prevalent among younger demographics with variance widening with age.

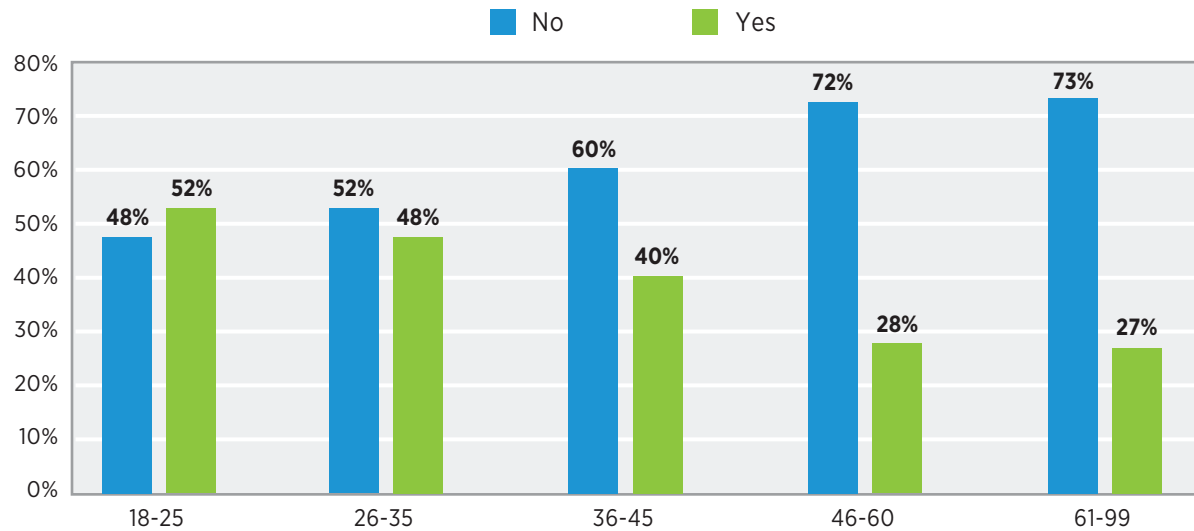


Figure 32: Have you ever shared your streaming account login information with others, or used someone else's login information?

YOUTUBE DOMINATES USER-CREATED VIDEO VIEWING

YouTube dominates user-created video viewing with 65 percent spending most of their time on that platform globally, with runner-up Facebook far behind at 16 percent.

Country	Facebook	Instagram	Snapchat	TikTok	Twitch	Vimeo	YouTube
Germany	9.3%	8.3%	0.8%	4.5%	2.0%	0.8%	61.7%
France	23.7%	9.2%	4.3%	4.9%	3.7%	1.0%	44.3%
U.K.	18.7%	7.6%	0.8%	9.2%	1.4%	0.8%	52.2%
Indonesia	9.1%	11.7%	0.8%	5.2%	1.6%	1.8%	69.0%
India	12.3%	9.1%	0.6%	3.4%	0.8%	0.2%	72.4%
Italy	31.3%	15.3%	0.4%	4.0%	2.4%	0.4%	41.3%
Japan	3.4%	5.7%	0.2%	5.2%	1.6%	1.6%	57.7%
South Korea	4.4%	4.2%	0.4%	4.8%	1.0%	1.2%	83.1%
Singapore	12.2%	5.9%	0.8%	5.7%	1.2%	0.8%	68.2%
U.S.	21.5%	5.4%	2.4%	8.0%	2.2%	0.6%	49.8%
Global	15.8%	8.9%	1.3%	6.0%	2.0%	1.0%	65.1%

Figure 33: Which of the following video platforms do you spend the most time watching user-created videos on?

Women view more video on social media platforms other than YouTube than compared to men.

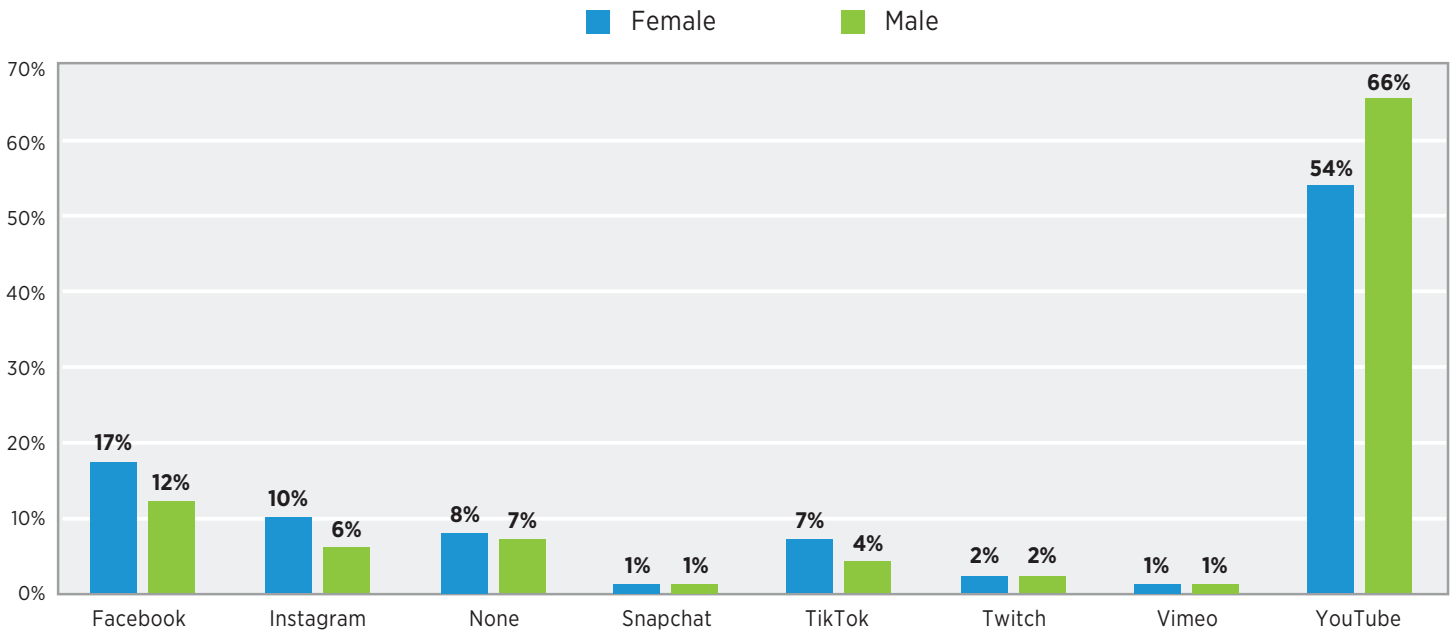


Figure 34: Which of the following video platforms do you spend the most time watching user-created videos on?

BROAD CONTENT PROVIDERS ARE THE MOST POPULAR PLATFORMS

Broad content providers such as Netflix and Amazon Prime outpace specialized content and sports providers by more than double the average weekly viewing hours. South Korea is the only country where live TV was more popular than broad content providers.

Country	Specialized content providers (Disney +, CuriosityStream)	Sports providers (ESPN +, Fubo)	Live TV providers (Hulu Live, YouTube TV)	Broad content providers (Hulu, Netflix, Amazon Prime, Apple TV)
Germany	1.4	1.0	2.1	3.8
France	2.3	1.8	2.6	3.4
U.K.	1.7	1.5	2.3	4.7
Indonesia	2.9	2.9	4.1	4.1
India	3.0	2.7	4.3	5.3
Italy	1.3	1.3	2.7	4.0
Japan	0.8	0.7	1.3	1.9
South Korea	1.9	2.1	3.6	3.2
Singapore	1.2	1.3	3.1	3.9
U.S.	2.1	1.6	2.5	5.5
Global	1.9	1.7	2.9	4.0

Figure 35: How many hours do you spend per week on each of the following types of streaming platforms?

The average weekly viewing hours across all platforms generally trended down for people 46-60.

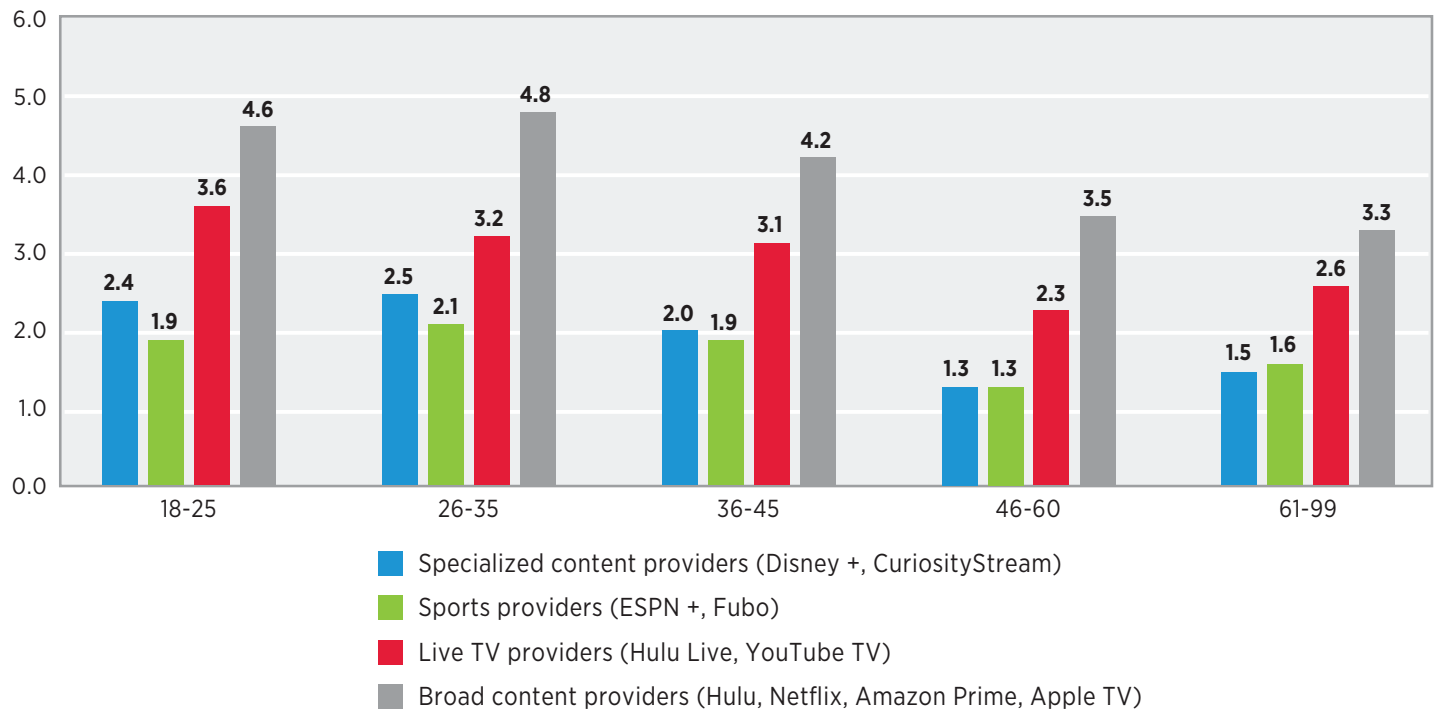


Figure 36: How many hours do you spend per week on each of the following types of streaming platforms?

CONCLUSIONS AND RECOMMENDATIONS

The consumer responses to this survey provide insight into the changing online video consumption habits over the course of 2020 as they adapt to the realities of life during the pandemic. While there are many useful data points revealed in the extensive number of charts and graphs, the conclusions and recommendations fall into four broad categories - scale, quality, content/price, and latency:

SCALE

The increasing popularity of online video can be seen across several dimensions. The average weekly viewer hours have jumped 85 percent since 2016. Binge watching popular content remains a favorite way to take in episodes of TV shows. The increase in weekly viewer hours has created a need for more content, which is being satisfied by subscribing to more streaming services. To keep up with the global increase in online video consumption, content providers need a video delivery infrastructure that can support today's traffic load, and that is expanding to keep up with future growth. You need a global CDN with enough capacity to deliver your video to the audience size and their regional locations.

QUALITY

Even as demand for online video grows, viewer expectations for a high-quality viewing experience remains. Stream rebuffering (when the video pauses during playback so it can reload), and poor-quality picture, are the most cited frustrations from consumers. The solution for the best possible online experiences is a CDN that specializes in video delivery.

CONTENT/PRICE

One of the primary reasons for consumers' increase in streaming subscriptions is to have access to all the content they want to watch. Part of the boost in subscriptions can be attributed to new and existing services offering limited time free trials. What happens when free trials time out will depend on the desirability of the content available on each service, the price, and the quality of the viewer experience - all factors that weigh in on the decision to keep a service longer term, as well as opportunities to differentiate your service.

LATENCY

Reducing the latency of your live streams is an important way to drive viewers to your live content, with this survey indicating that two thirds of global consumers would be more likely to watch live events if the stream wasn't delayed. Beyond just delays, lowering latency opens doors making it possible to offer new interactive online experiences such as in-event sports betting, online gambling, online auctions, and many other new business opportunities. To do this, you need a CDN that offers a range of low latency stream delivery options.

LEARN MORE

Limelight's CDN is architected to deliver online video with the scale, quality of experience, and low latency required to excel in today's online video environment. For more information visit: <https://www.limelight.com/products/video-delivery/>.

APPENDIX – DEMOGRAPHICS

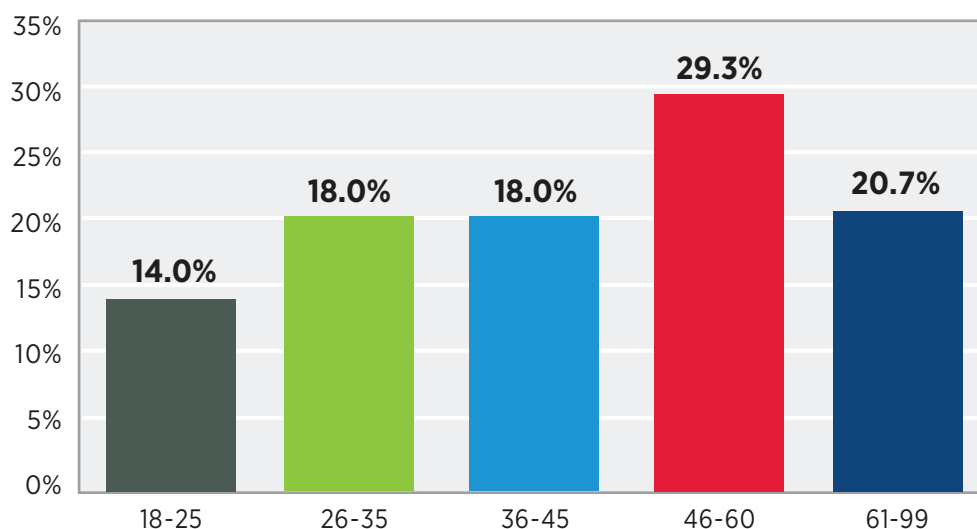


Figure 37: How old are you?

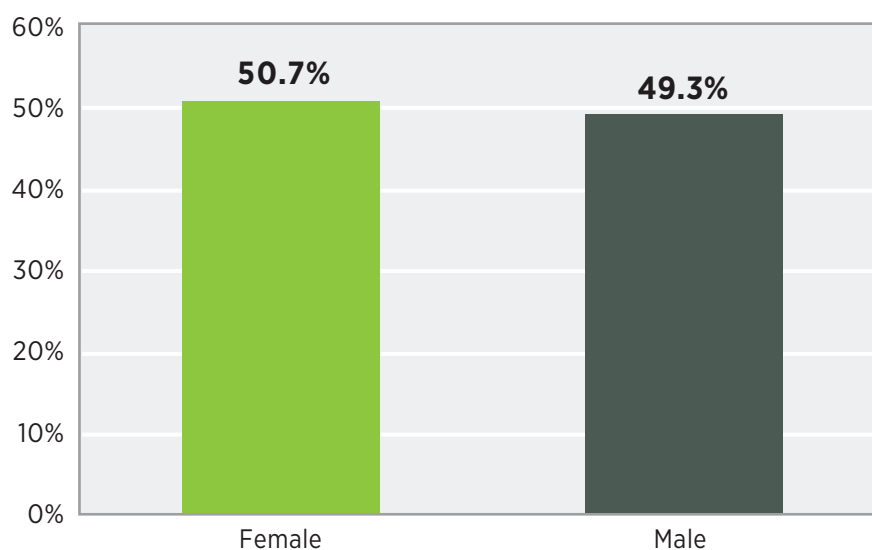


Figure 38: What is your gender?

METHODOLOGY

This survey was fielded by a third-party company with access to consumer panels in France, Germany, India, Indonesia, Italy, Japan, Singapore, South Korea, the U.K., and the U.S. 500 responses were collected from each country for a total of 5,000 global responses. Survey responses were collected between August 1-12, 2020.

ABOUT LIMELIGHT NETWORKS

Limelight Networks Inc., (NASDAQ: LLNW), a leading provider of digital content delivery, video, cloud security, and edge computing services, empowers customers to provide exceptional digital experiences. Limelight's edge services platform includes a unique combination of global private infrastructure, intelligent software, and expert support services that enable current and future workflows. For more information, visit www.limelight.com, follow us on Twitter, Facebook, and LinkedIn.

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