



06/01/15

Streaming Service Market Research

November 2014

Executive Summary (Part 1)

- » When we asked if respondents were interested in a live streaming solution, all the respondents who answered the question expressed interest in the final product. However, 37% of the total respondents did not answer this question. 10% of respondents said the Janet brand was an important factor
- » Over 60% of responses said value for money is either very important or essential
- » 60% said having a reliable service is essential
- » 70% think ease of use is important, though only 10% went as far as to say it was essential. It remains a factor that stands out clearly in their minds as a positive aspect of other live streaming solutions currently available, with some respondents saying that they were put off other services due to their lack of ease of use
- » YouTube is by far the most popular current provider for live streaming, as it has been used by nearly 70% of our respondents. It was followed by bespoke in-house services (42%), and Livestream (36%)
- » Cost, ease of use, quality, and compatibility with mobile devices were all mentioned as strong positive features of other services
- » Support, reliability and lack of interactivity with audience were repeatedly cited as areas of weakness among other services
- » 64% said that demand for this type of service is growing, especially among departments that wish to use this type of service for lectures
- » Major barriers preventing more people adopting this technology includes time/training necessary, cost, and perceived complexity

Executive Summary (Part 2)

- » The most common situations that this service will need to be suitable for include lectures/teaching, events, and graduations
- » 29% of respondents use these services on at least a weekly basis, with half of those using it daily
- » 50% use live streaming monthly
- » While over half of respondents did not know how much they paid for these services, most paid up to £500 per year, with some paying up to £1000 per year
- » It was often mentioned that the cost of a service should allow for the peaks and troughs of the academic year, perhaps by charging based on bandwidth used (with bandwidth groups detailed) or a pay as you go model
- » The favourite form of technical support is online, closely followed by phone, with many eager for a helpdesk which allows them to choose which method they prefer in any given situation
- » Some preferred features include live chat/audience interactivity, simultaneous presentation, and restricted access
- » The majority do not need an audio only option, but 25% would like to see it, mainly for use with a radio station
- » 46% have never hired film equipment from an external company, with many citing cost as a contributing factor
- » Most responses (62%) indicated that people were not concerned about the location of the streaming servers, so long as there were no issues legally, and that long distances would not affect the quality of the streams

Introduction

- » This report is the evaluation of the Market Research conducted for the Streaming Service
- » The aim of this report is to understand the live streaming market and the features that our customers need. It will also help to find where our service could potentially fill a gap in the current market
- » Analysis covered in this report includes: current popular services, likes/dislikes, barriers to using the technology, demand, usage, what an appropriate cost would be, and how it will need to be supported
- » This report evaluates the views of online participants, who agreed to take part in an online focus group using the research software VisionsLive
- » The participants include members of staff at universities, primarily with a background in technology, IT, or Audio Visual Services

Methodology

How did it take place?

» Focus Group:

- › There were 19 participants
- › There were two focus groups on two different days; one at lunch time, one at the end of the day
- › Each focus group lasted just over one hour
- › It was conducted online using VisionsLive
- › It was not incentivised
- › They took place on the 4th and 5th November 2014
- › The focus group made use of different styles of questions; some involved being able to freely type any answer, while other questions suggested some options and required circles around the answers that best suited

Learnings

What does this mean for the Streaming Service?



Learnings (Part 1)

What should be kept in mind when planning this service?

- » We need to keep costs competitive
- » It must be compatible with as many devices as possible, including mobile
- » It is essential that it is reliable
- » It needs to be capable of producing a high quality stream, both in terms of little buffering and high video resolution
- » The final product should have an easy, intuitive interface, for both the staff setting up the live stream as well as the audience
- » Preferably, there should be a way of having your audience interact with the people running the stream, or other members of the audience, or both
- » It should include good quality support that is easily available, preferably in multiple forms (online and phone)

Learnings (Part 2)

What should be kept in mind when planning this service?

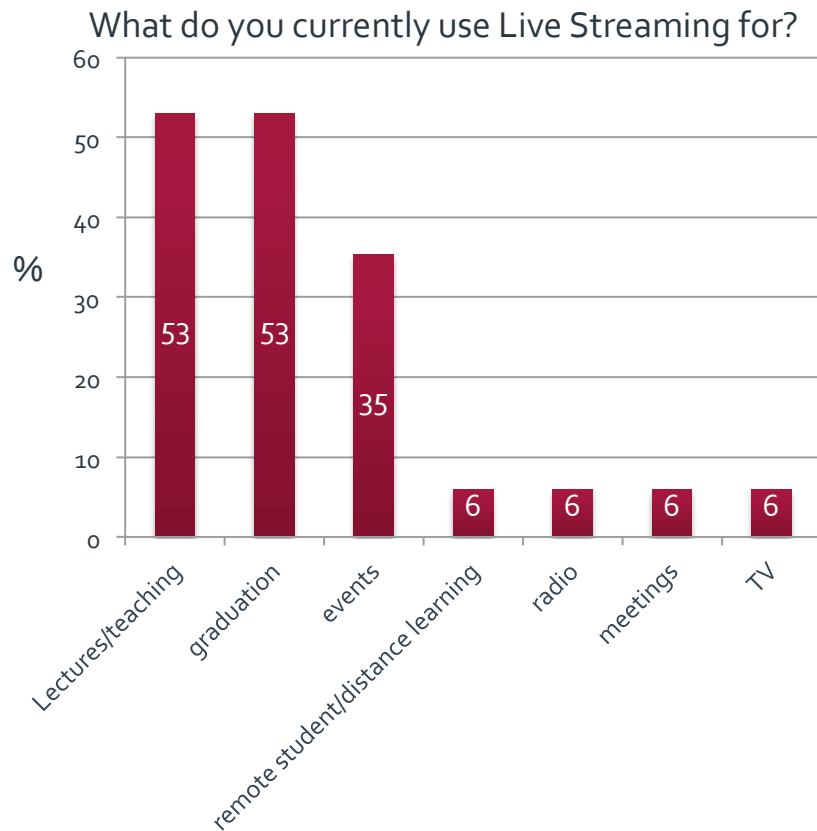
- » Demand is increasing, so this is a market with an expanding number of potential customers
- » As barriers include time, training, cost, and perceived complexity, there needs to be a way to demonstrate that our service is low in cost, does not require a large time investment or a lot of training, and is not complicated to use
- » It needs to be proven to handle the most common streams (lectures, graduations, other events), while also being able to handle all the other ideas that people are eager to test out
- » There should be flexible pricing contracts, for those that use it regularly as well as those only using it on special occasions
- » These pricing contracts should be easy for the customer to upgrade/downgrade

Questions Breakdown Survey



Previous Experience

Q. What has been your experience of live streaming within your institution?

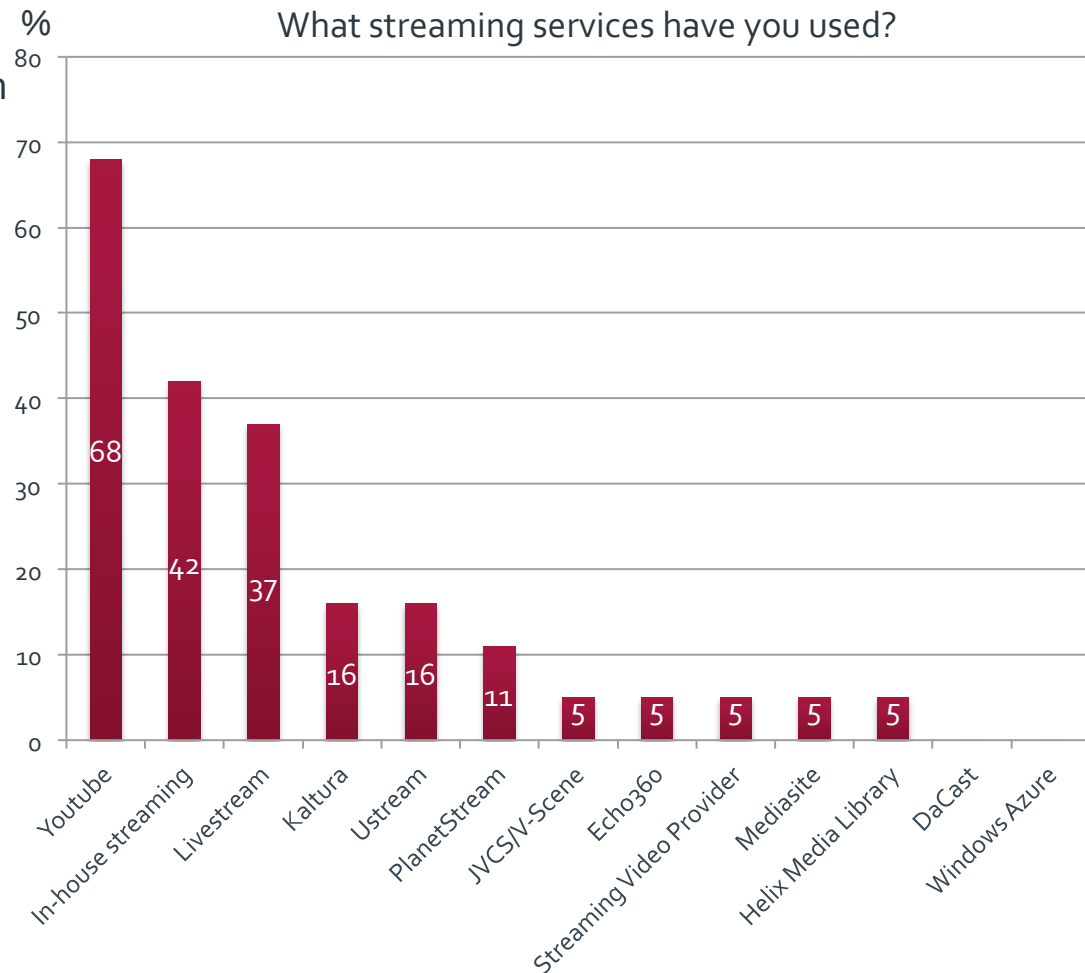


- » The activities shown in the graph demonstrate the ways that streaming technology is currently being used
- » The most popular uses are lectures/teaching, graduations, and other events
- » Therefore, the service we provide must be able to stream lectures, graduations and other events, while being flexible enough to cater for the myriad of other uses a university will find for live streaming

Previous Experience

Q. What video streaming services have you used?

- » This highlights the main competition in the live streaming sector
- » YouTube is by far the most popular service, as nearly 70% of respondents said they had used it
- » This is followed by bespoke in-house services, and Livestream
- » Most people have used more than one streaming service
- » The fact that most people have used more than one streaming service suggests that many services do not satisfactorily offer all the features that the customers need, and that they are still searching for a product that does



Previous Experience

Q. What did you like/dislike about those services?

"YouTube is pretty user friendly and most people are familiar with it" – Focus Group Respondent

"Planetstream - allows us to ramp up from free account to paid for account if we need the capacity" – Focus Group Respondent

"Bespoke in house was best for ensuring control and quality of stream" – Focus Group Respondent

"YouTube - free, relatively easy to use, good quality, very good device support, streamlined workflow (we host videos on YT). Youtube enables interactivity if required too, via the Hangouts option" – Focus Group Respondent



"Planetstream - support at the weekend was hard to access" – Focus Group Respondent

"YouTube was disappointing as it kept dropping the video out on occasion" – Focus Group Respondent

"YouTube - Google hangouts... seems like each time I went to try it, things had changed and it wasn't like I remembered it last time" – Focus Group Respondent

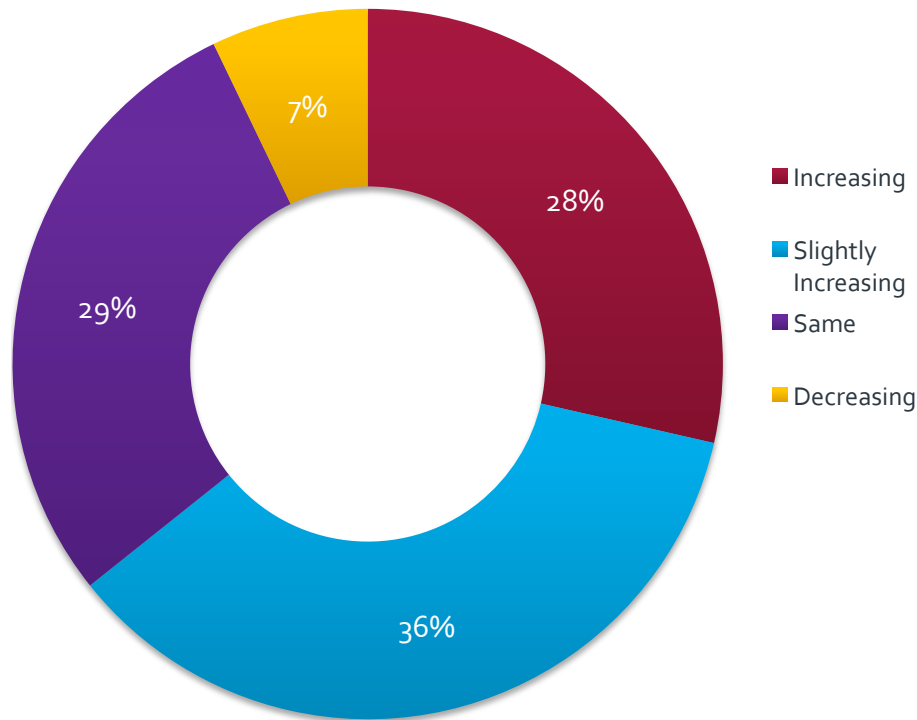
"Livestream - we struggled with quality" – Focus Group Respondent



Growing Demand

Q. Is there growing demand from other departments to use streaming?

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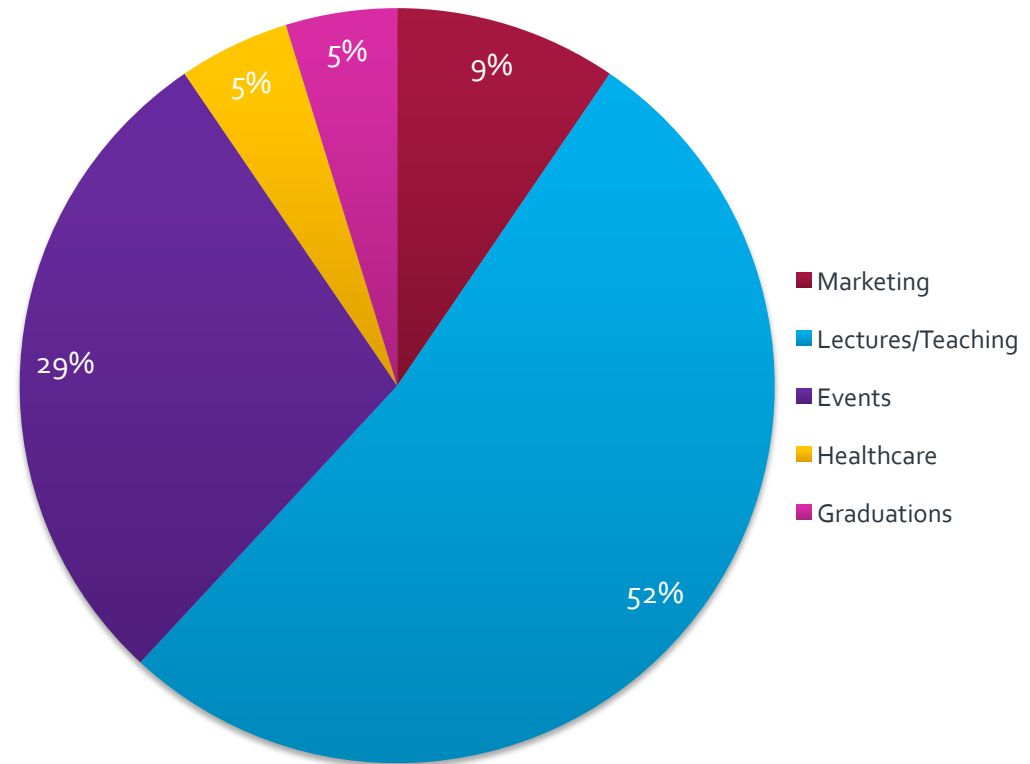
- » Most people are seeing an increase in demand for this type of service
- » 64% of responses suggest an increase in demand
- » Only 7% are suggesting a decrease in demand

Growing Demand

Q. Which Departments and what did they want to use it for?

- » Over half of the responses show an interest in using live streaming for lectures/teaching
- » This indicates that there are many more wanting to use streaming for lectures/teaching, on top of the fact it is already by far the most popular use of live streaming currently within these institutions
- » The second largest group is events
- » Nearly 10% of responses would like to use it for marketing (likely on a large scale to stream a special event)

Which departments want to use live streaming and what do they want to use it for?

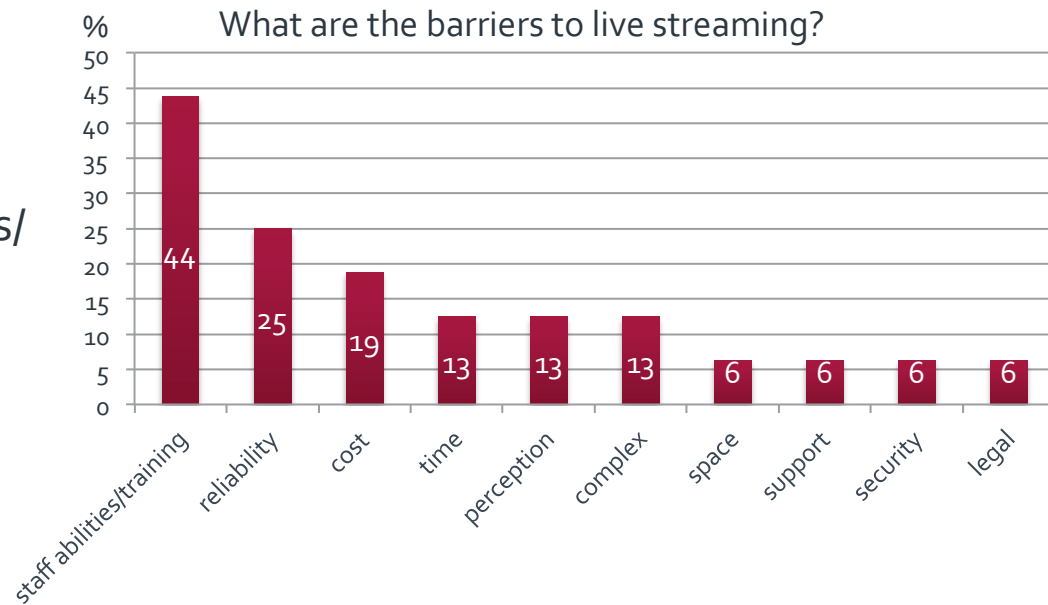


"I'm not sure there are many barriers to live streaming left. The equipment is now cheap and reliable" – Focus Group Respondent

Barriers

Q. In your opinion, what are the barriers to getting the most out of streaming?

- » According to our focus group, staff training is the biggest barrier to getting the most out of streaming
- » Other concerns include costs, complexity, time, and the perception that it is a difficult thing to do
- » However, others consider there to not be many barriers left
- » Nearly 45% agree that staff abilities/training is the biggest barrier



Training

Q. Is there any training for this kind of streaming at the moment?

- » While the biggest barriers to using live streaming is a feeling among staff that they are not well trained enough, there also appears to be very little training available to remedy this
- » 83% said no, relevant training for live streaming was not easily available

Q. Is there a need for more training?

- » Despite this, only 66% of those who answered agreed that there is a need for more training
- » Ease of use is suggested as a counter for the requirement for training

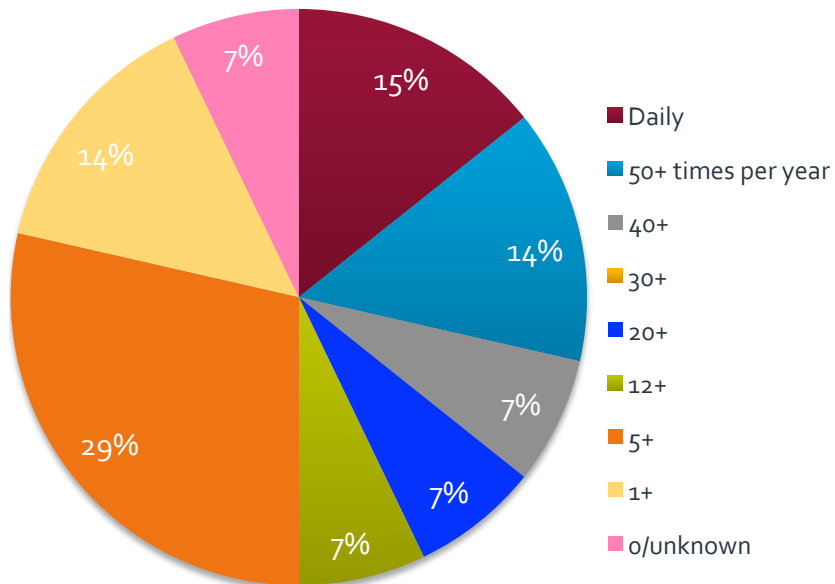


“Ideally the service wouldn't require training!” – Focus Group Respondent

Current Usage

Q. How often do you use the streaming service at your institution for these services?

How frequently do you use live streaming?

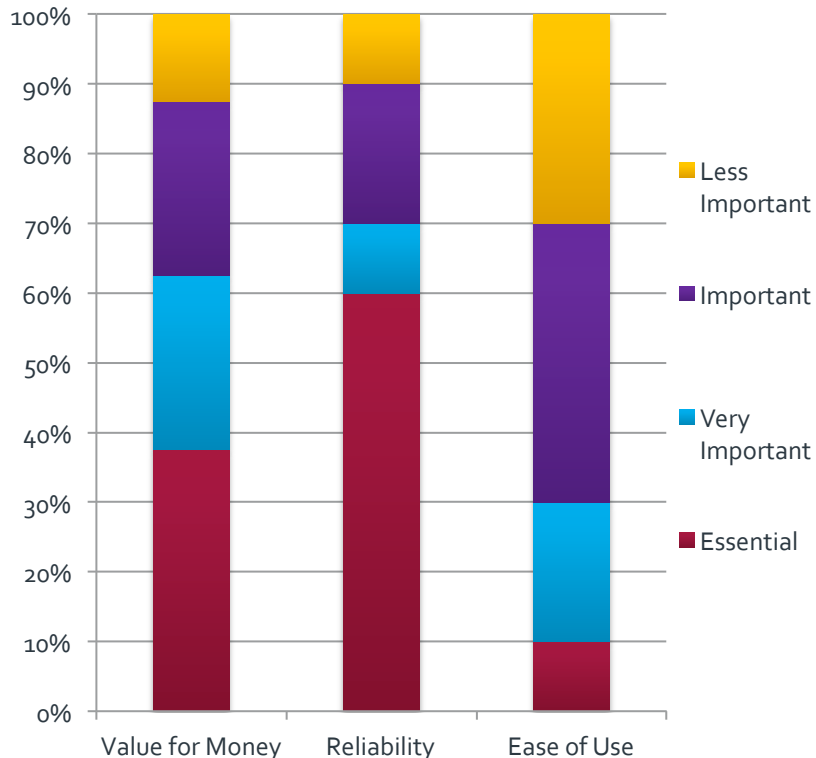


- » Many institutions use this type of service on a daily basis, and nearly all at least use it for special events
- » 15% use it daily, and nearly a third use it at least weekly
- » 50% use it more than 12 times per year (monthly)
- » 7% do not know how often they use this technology, which could refer to either high or low use of streaming services
- » Those that use it daily use it mainly for lectures

Important Aspects Value for Money/Reliability/Ease of Use

“Cost [is] most important for [the] institution; reliability and ease of use [are more important] for staff” – Focus Group Respondent

How important are Value for Money, Reliability and Ease of Use?



This graph shows how important the focus group considered value for money, reliability and ease of use.

- » Generally, reliability was considered the most important, with 60% saying it was essential, and a further 30% saying it was either important or very important
- » Value for money is the second most important factor, with nearly 90% saying it was important
- » Ease of use also considered important by 70%, though compared to reliability and value for money, it is less essential
- » One very interesting point is that when asked earlier what they liked about services, ease of use was the top answer for many services, yet it is considered the least important aspect here, compared to cost and reliability

Cost

Q. What would be a reasonable price for a year long contract?

- » A common price for current services was frequently stated as being up to £500 per year (with some paying up to £1000 per year)
- » A large number of our focus group (66%) showed support for a “pay as you go” model idea
- » Alternatively, 50% liked the idea of signing up to a specific bandwidth package, splitting bandwidth amounts into different usage groups
- » While previously only 35% suggested cost was essential, a re-occurring trend is that our service will not be successful if the cost is not competitive, and it is not cost-effective to swap to our service
- » This is made more difficult by the fact the most popular current service is YouTube, and this service is free, therefore our service will have to be more reliable, and offer additional features to our community

“Allowing for the natural peaks in the academic year would be good” – Focus Group Respondent

“[Cost] would need to be competitive for procurement to allow it” – Focus Group Respondent

“By bandwidth, by access views, some kind of parameters need to be defined” – Focus Group Respondent

“When the stream hangs it is reassuring to be able to speak to someone. Don't think YouTube offer that facility.” – Focus Group Respondent

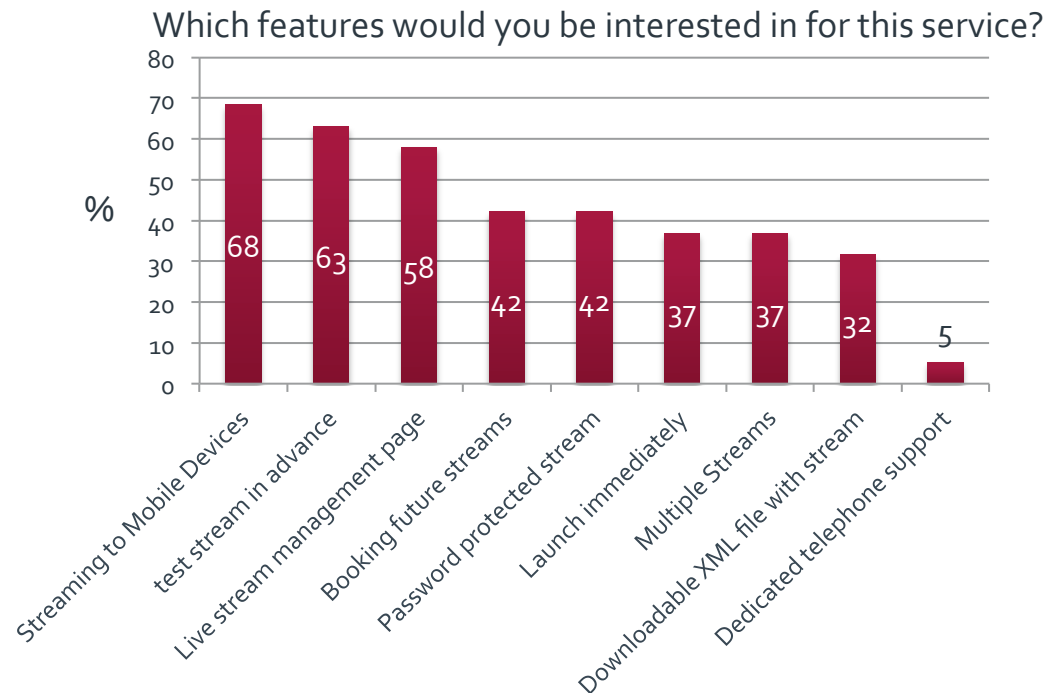
Important features

Q. Which of the following features would you be interested in?

- » Compatibility with mobile devices is the most important feature to include
- » This is closely followed by being able to test streams in advance, and having a management page
- » Other ideas suggested include language options, captions, and facial recognition

“Streaming to mobile devices [is] essential now. [A] third of traffic to [our] website is from phone and tablet.” – Focus Group Respondent

“Restricted access would be a requirement for teaching use” – Focus Group Respondent

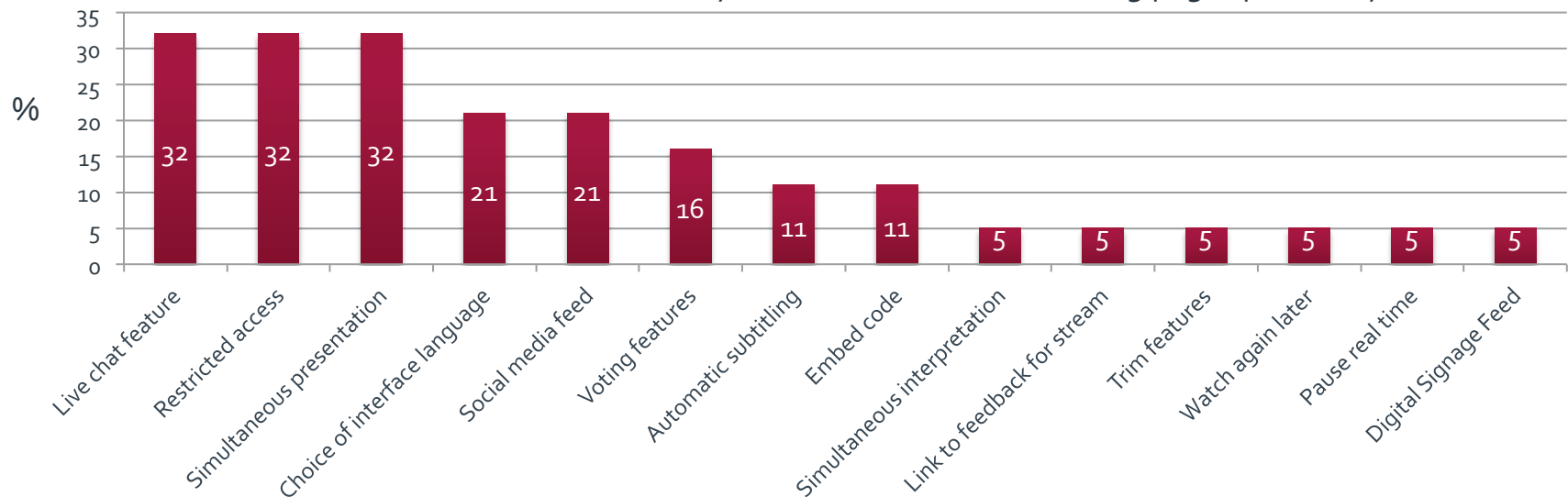


Important features

Stream hosting page features

- » The three most desired features for the stream hosting page are: a live chat box, restricted access, and simultaneous presentation content (being able to have multiple views)
- » Other popular ideas include having a social media feed, a choice of language, and voting features

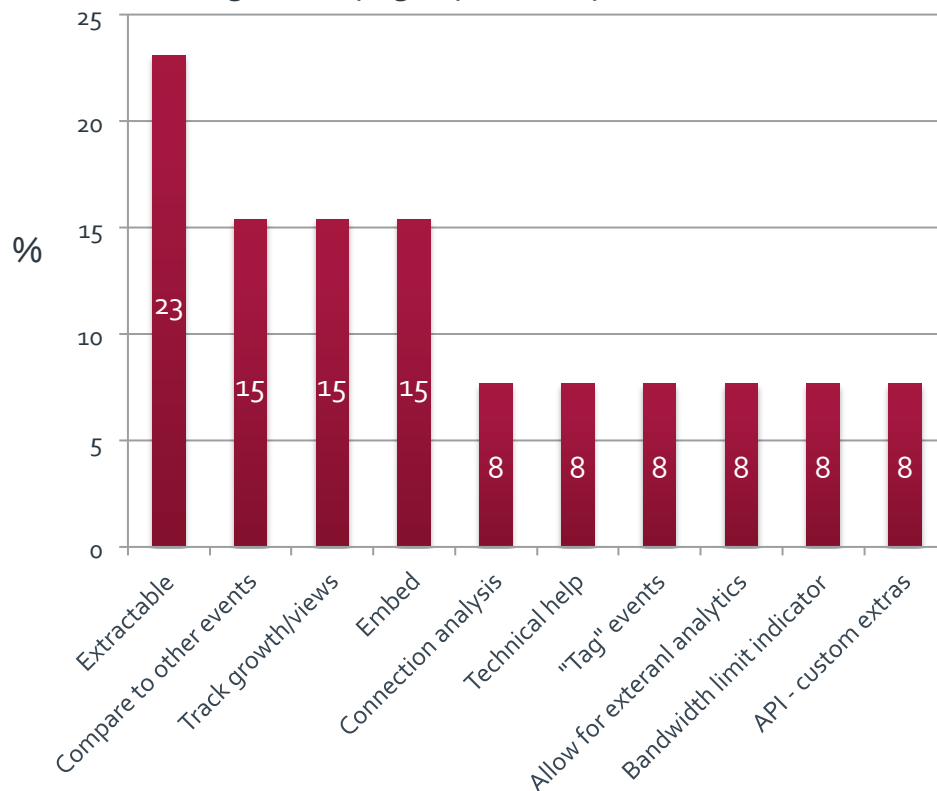
What features would you like for the stream hosting page specifically?



Important features

Management page features

What features would you be interested in for the management page specifically?



» Management page:

- » 62% specifically stated they liked the mock-ups and ideas for the statistics page
- » They would most like to be able to extract the statistics, or plug-in their own statistics analysis engine
- » Being able to embed the video on their own web page appeared as an important feature on both questions

Important Features

Free-text analysis

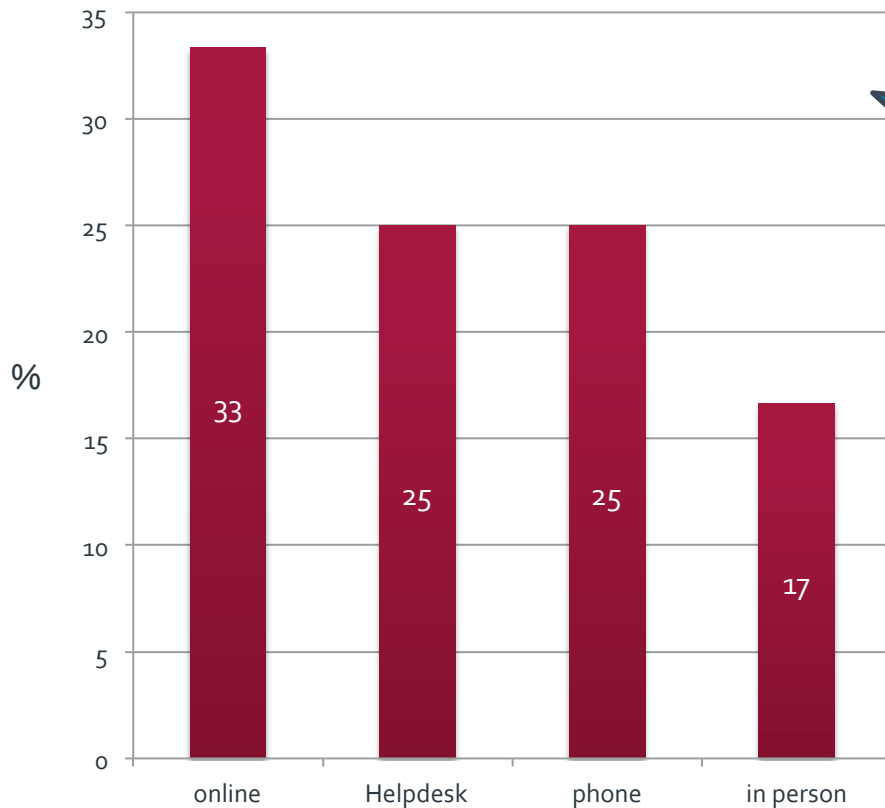


- » This free-text analysis studies the answers the questions about all the features they would like to have included
- » From this, we learn that again common uses are for *events* and *graduations*
- » Other words we should pay attention to *stats* and *analytics*, as well as *devices*, *booking*, *mobile*, and *interface*

Technical Support

Q. What about online support?

Which method of technical support would you most like to see?



“Sometimes telephone support is better than online, Sometimes I like to talk to the person directly” – Focus Group Respondent

» From the graph, online appears to be the preferred method of support

“It is really hard sometimes to talk on [the] phone from outside live stream location” – Focus Group Respondent

» However, one clear thing that was said was that they would appreciate the choice, if both phone and online could be supported, by way of a helpdesk

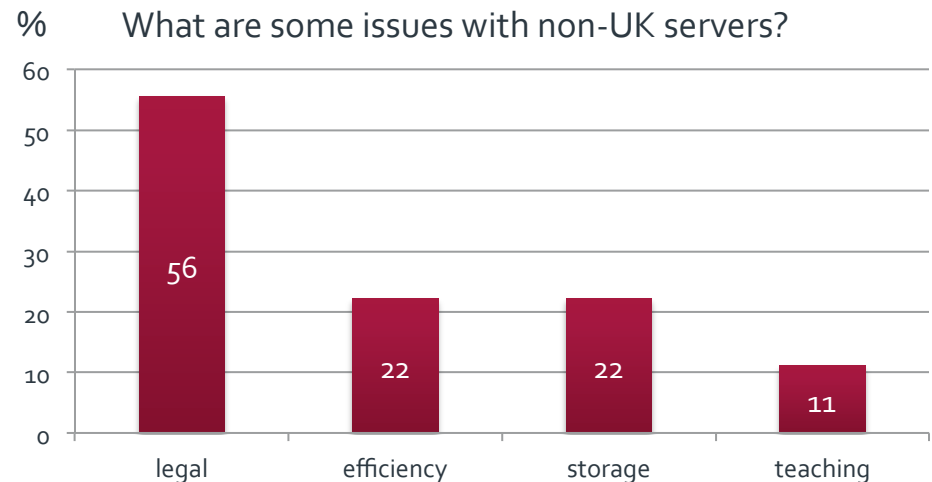
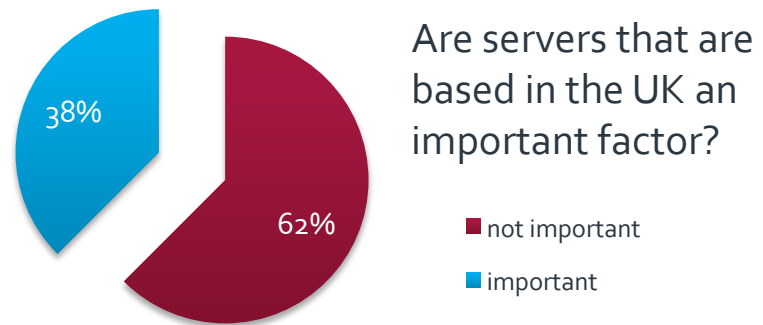
» Also, overall quality of support is more important than how that support is available

“For me it's about the quality and responsiveness of the support and not how it is provided” – Focus Group Respondent

UK Servers

Q. Are servers that are based in the UK an important factor?

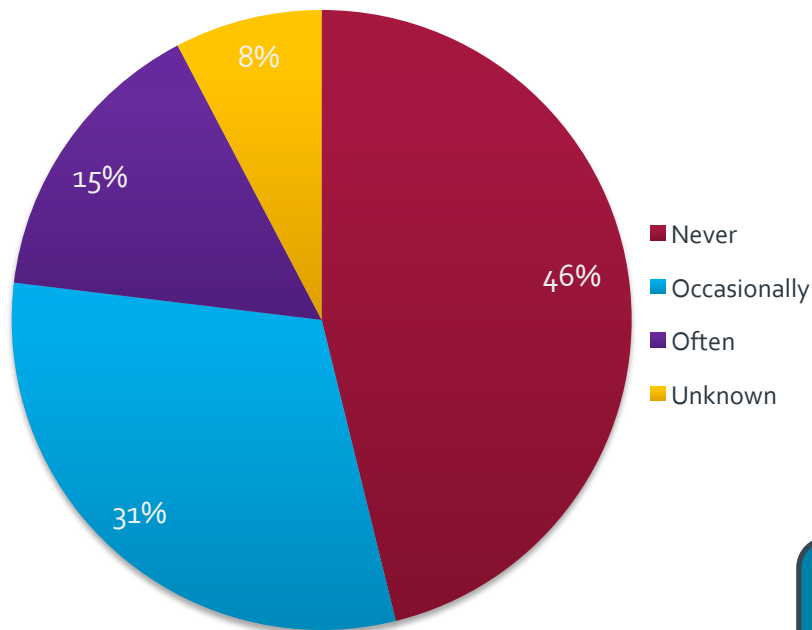
- » While 62% said it was not an important factor, they all added that it was only not important if legal issues and other potential problems had been worked out
- » Further, the 38% who said it was important agreed that it was only important due to those reasons, that they wanted to bring attention to these potential obstacles for server location
- » The biggest concern people had with non-UK located servers was to do with legal issues, particularly if any data is going to be stored on these servers



Hire Equipment

Q. Do you hire AV equipment for large streaming events?

How often do you hire AV equipment?



- » 46% have never hired equipment from an external company for their streaming events
- » 15% do hire equipment on a regular basis
- » 31% only do it occasionally, for example, for graduations

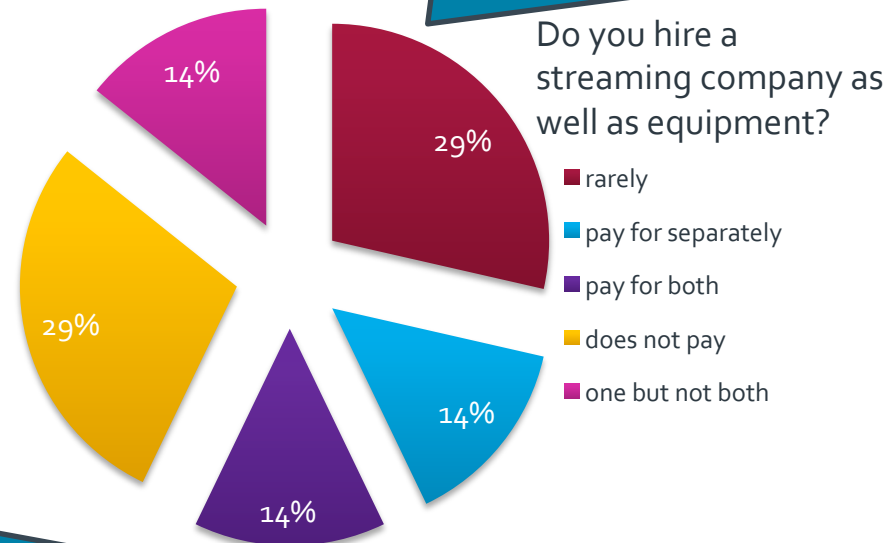
“We hope to eliminate the need for external completely as the team grows/gains experience” – Focus Group Respondent

Hire Equipment

Q. Do you hire a streaming company to look after your events AND film equipment or do you pay for these services separately?

- » The responses to this question were very split
- » An equal amount (14%) pay for both from the same place, as pay pay for them separately
- » Further, 14% only pay for one but not the other
- » 58% either do not pay for external companies, or very rarely

“external [company] is usually used for difficult external locations” – Focus Group Respondent



“College would not want to pay for a film crew when they have staff that they already pay” – Focus Group Respondent

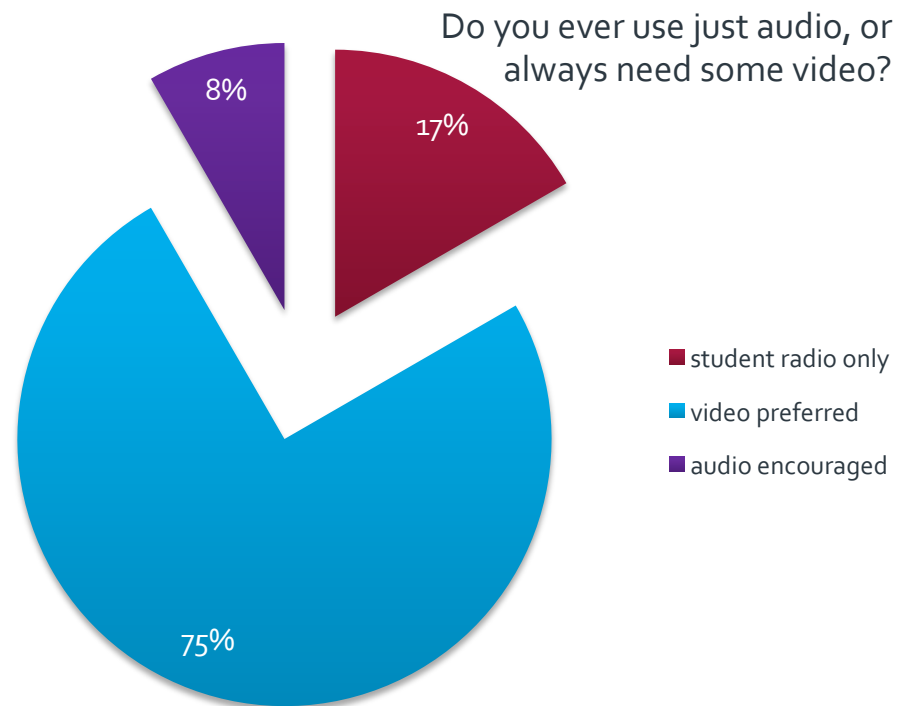
Audio

Q. Are there time in which just audio is needed or do you always need a live video?

- » 75% did not need an audio only option
- » Only a quarter of people have need of an audio only option

"If only audio is needed, we already have decent systems available" – Focus Group Respondent

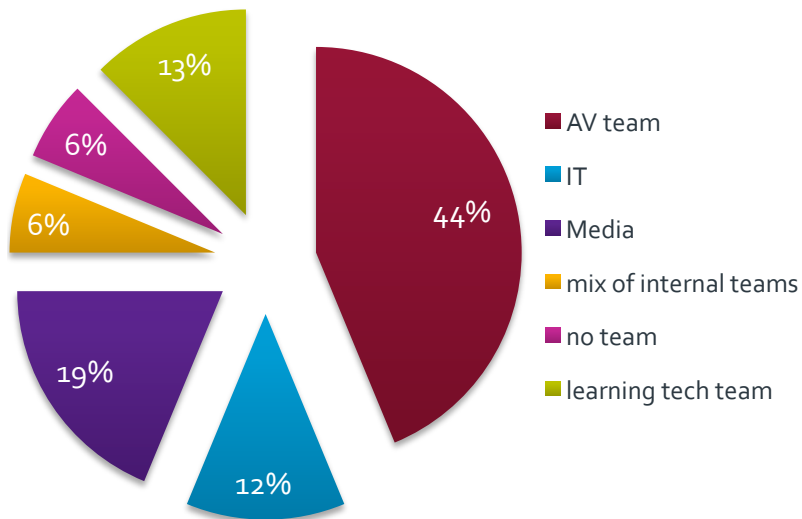
"I would like to see audio only encouraged but we seem to be in a video world" – Focus Group Respondent



Responsibility

Q. Who is responsible for the production of your streaming?

Who is responsible for the production of your streaming?



- » For the majority (88%) there is a single team tasked with the responsibility of making sure the live streaming is effective
- » This task is commonly given to the AV (audio/visual) team, or the Media team

Further Ideas

Q. Are there other ways streaming could be used?

"I also *really* like the idea of being able to stream several views of same event simultaneously" – Focus Group Respondent

"I think its feasible to use live streaming for almost any activity within the institution - as long as there are staff to operate cameras and the budgets available." – Focus Group Respondent

"Distance learning, workshops for staff/ students not present on campus, Widening-participation-type events, Virtual Open Days for overseas students particularly" – Focus Group Respondent

"We occasionally stream data visualizations and scientific experiments" – Focus Group Respondent

"a matrix of kit and software with advantages and disadvantages of each set up would be good" – Focus Group Respondent

- » One idea people really liked was the possibility of having multiple views at once that people can choose between
- » As many ideas were suggested, it is clear that the final service must be flexible enough to handle many different situations
- » Other ideas include streaming events for those unable to attend, training, support

Interest

Q. If Janet offer this – would this be something that would appeal to you?

- » Strong support of the Janet brand attached to a service such as this - 15% stated that they would be interested directly as a result of it having Janet associated
- » All respondents who answered (67%) showed interest in this service, however, half the respondents reiterated that it must be cost efficient for them to swap from any current plans

“It is always nice to be able to rely on Janet doing it :)” – Focus Group Respondent

“We would definitely look at any service offered by Janet for global streams” – Focus Group Respondent

Profile of the Respondents

Who took part?

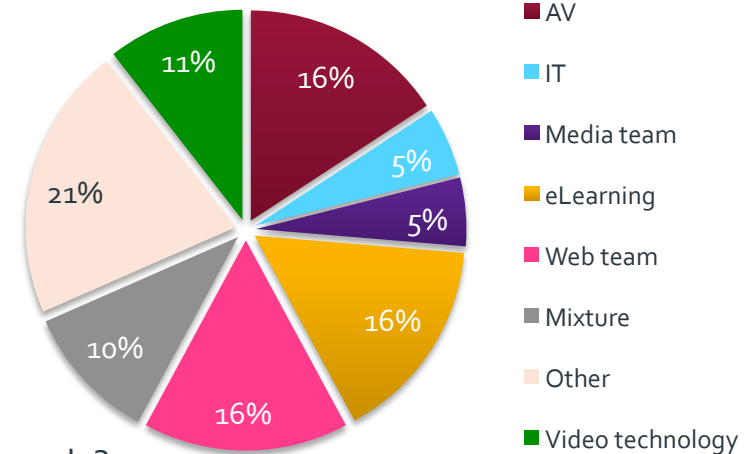


Profile of the Respondents

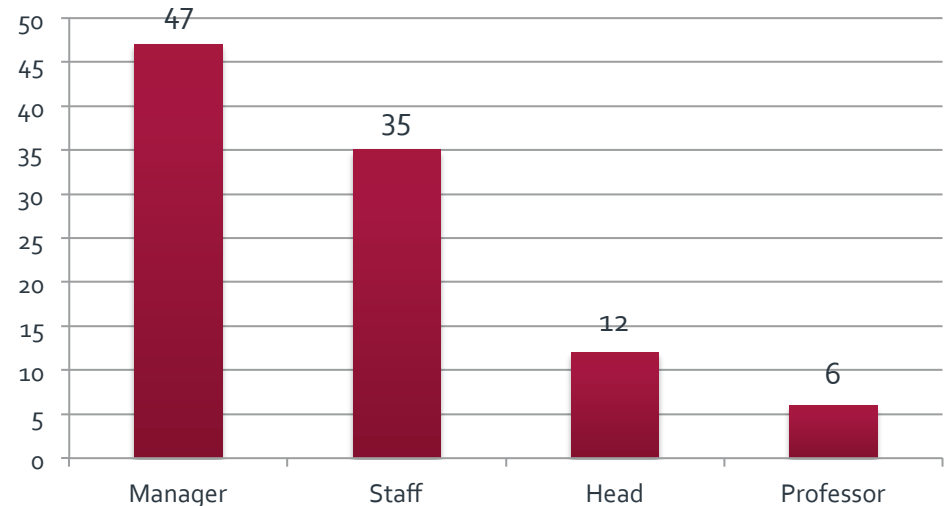
Who attended the focus groups?

- » The focus groups were primarily comprised of people who are highly trained in using a variety of technology in areas related to live streaming
- » The “Other” category includes an Educational Designer and a Student Experience Project Manager, among others
- » The largest groups work in AV teams, eLearning, or the web team
- » Nearly 50% were managers of their team
- » Also included are heads of departments, and professors
- » Over 75% were from universities, the remainder were from colleges

In which area do you work?



% What is your role?



Geography of the Groups

Locations of our Focus Group Members

- » The map shows where the members are located
- » These focus groups have managed to attract multiple responses from all corners of the UK
- » Some cities had more than one respondent, i.e. Cardiff, Swansea, London and Leicester



Conclusion

- » Overall, the most essential aspects to consider:
 - › Competitive pricing
 - › Reliability
 - › Ease of use
 - › Good quality stream
 - › Compatible on many devices
- » Preferable to include:
 - › Intuitive interface
 - › Technical support, both online and by phone
 - › Interactivity with audience
- » Other features to include:
 - › Downloadable XML
 - › Restricted access streams
 - › Simultaneous presentation
 - › Choice of language
 - › Embed code
- » Could also include:
 - › Recommended equipment list
 - › Launch immediately
 - › Book/schedule for later
 - › Social Media feed

Contact Details

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