



LIVE STREAMING

A new economy of connection

REVEALING REALITY

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ABOUT REVEALING REALITY

Revealing Reality is a multi-award-winning insight and innovation agency. We enjoy working on challenging projects with social purpose to inform policy, design and behaviour change.

Many of our projects, particularly those in the media space, have uncovered areas of insight that we feel are under researched. We would prefer that key stakeholders with responsibility in this space were pursuing these avenues of research, however we believe progress isn't being made fast enough.

Therefore, in order to prompt action and begin necessary conversations, we have made the decision to embark on a series of self-funded projects exploring these areas – enabling us to become thought leaders in the space of online media habits and behaviours.

Visit www.revealingreality.co.uk to find out more about our work or to get in touch.



WHAT WE DID

WHY WE SET UP THE RESEARCH

The regular consumption of live streamed content by our respondents keeps cropping up in our media research. We have been able to gain some insight into why this is becoming such a popular form of content and the impact it has on people, but have thus far been unable to explore the topic fully. We rarely come across discussions about live streaming, or what it implies, despite it being a huge and growing industry, highlighting the immediate need for further research in this area.

Live streaming consumption has also tended to coincide with a desire for connection – time and time again we’re seeing links between the use of online communities, like the live-chat alongside online gambling, and the desire to form relationships.

We wanted to explore the mechanics of live streaming: what it’s like for the streamers and the viewers, and the potential links between a more disconnected society and the rise of live online content.

We haven’t included any recommendations about what might need to change in the world of live streaming, instead focusing on bringing clarity to a phenomenon that is helping shape the future of our society but is poorly understood.



THE INVESTIGATION

We have spoken to a wide range of individuals who consume live streaming content in our past media work, and this has informed our thinking. However, we hadn't talked to the people behind the camera. In order to deepen our understanding and capture the streamer voice we spoke to five streamers – recruited in house – about their experiences.

This isn't a straightforward research report. It's a detailed introduction to livestreaming, including insights from our past work, an investigation into streaming platforms and interviews with live streamers.





SECTION 1

INTRODUCTION



STREAMING'S RISE

Live streaming has gained a degree of pre-eminence within the online landscape over recent years. It's a simple concept – someone broadcasts something they are doing live online, and viewers are usually able to interact with that person and with others who are watching. It has risen massively in popularity, with some of the most popular streams gaining hundreds of thousands of viewers at a time.

MISCONCEPTIONS

When we think about those viewers – and the streamers too – we're likely to form an image of a headset-wearing teenage boy, in front of multiple monitors, playing video games in a darkened bedroom. But that image doesn't reflect reality. The rapid growth in live streaming means it's certainly out of date, and it may have never been correct in the first place. The viewers we talk about here are a diverse group, and although certain types of people are overrepresented, live streams of all kinds are starting to attract a viewership that looks increasingly like wider society. Gamers are still a huge audience, but when we talk about the people who watch live streaming, we're also talking about avid cyclists, bingo players and even members of church congregations.

PLATFORMS

Live streaming has risen dramatically in popularity in recent years. Major social media and video hosting platforms have built their own live streaming capability – Facebook, Instagram and YouTube, for example, all now enable users to stream video live to viewers. Dedicated livestreaming platforms such as Twitch have grown exponentially in a relatively short space of time, with up to 500,000 performers streaming live on the platform every day. The increasing appetite for non-gaming live streams is also reflected in the success of a range of other platforms. The adult entertainment industry, for example, has been utilising webcamming for years, and provided a lucrative outlet for live streaming sites well before the advent of Twitch. Even religious organisations are using streaming as a way to broadcast services to audiences around the world.

MONETISATION

Live streaming is a huge money-making machine, although probably more so for the streaming platforms than the streamers themselves. Viewers can usually subscribe, tip and donate to their favourite streamers, often in the hope of a mention during the live stream. Streaming is aspirational, some have made it big, and streamers, including the individuals we spoke to, dedicate hours of their time in the hope of profitable returns. In reality the platforms themselves take huge cuts and it takes a huge amount of work for most to earn a living wage.

STREAMING IS ABSENT FROM THE CONVERSATION

Despite how commonplace live streaming has become, it's rarely discussed or explored by policy makers or regulators – allowing misinterpretations to persist and ignoring the impact of its influence on society; particularly young people. For many organisations and individuals who are responsible for shaping the policies around media, young people and online behaviour, the intricacies of live streaming are simply not well understood. In this report, we hope to add some context and individual voice to this remarkable streaming story.

OUR WORK

In our work across media, online harms, sex and pornography, young people, and even gambling, we've seen live streaming come up time and again. We've seen how it fits into people's lives, what they put into it, and what they get out of it. This report aims to bring together many of the things we've seen, and to shed some light on the different forms live streaming has taken. Importantly, it intends to pose questions about whether we know enough about this growing phenomenon, and what it means for society. One of the key areas we explore is how live streaming fulfils the need for connection. Besides providing people with content they enjoy watching for a wide variety of reasons, this relatively new form of media provides people with what they often feel to be genuinely meaningful relationships. These are forged through a close sense of connection with the host, and a wider sense of community, belonging and shared interest with other viewers.



THE OVERALL STRUCTURE OF THE REPORT IS AS FOLLOWS:

- **The platforms:** this section intends to act as a guide to live streaming, explaining everything you should know about how live streaming platforms work
- **The users:** this section explains who the streamers and viewers are
- **What's in it for them?** Here we explore in more detail the experiences of viewers and streamers – what they do, and why they do it. It also poses some questions around the impact of the parasocial¹ relationship between viewers and streamers, and the pressures placed on the streamers themselves

We have also created both respondent case studies and platform case studies to bring the characters we interviewed to life, and to give more detail on some of the streaming platforms we refer to throughout.

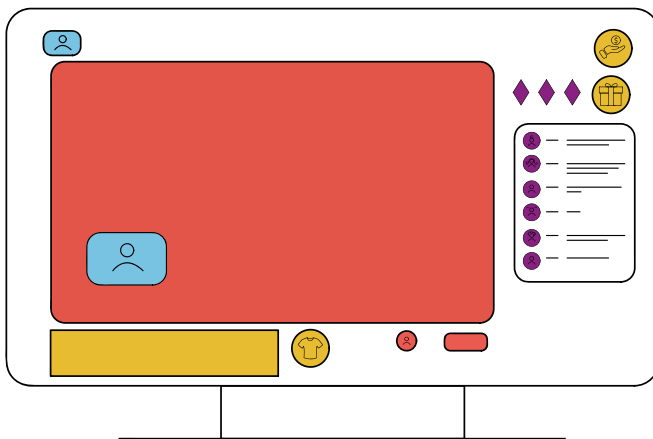
1 Horton and Wohl: A kind of psychological relationship experienced by members of an audience in their mediated encounters with certain performers in the mass media, particularly on television. <https://www.oxfordreference.com/view/10.1093/oi/authority.20110803100305809>



SECTION 2

THE PLATFORMS


WHAT IS A 'STREAMING PLATFORM'?



- LIVE
- MONETISATION
- SOCIAL INTERACTION
- STREAMER

There are lots of ways for people to stream content live, but not all of them create the specific live streaming experience we are exploring here. Central to this kind of 'live stream' is the sense of connection fostered between the streamer (or host) and viewer – and there are some common features which need to be present for this to happen. They don't always look or work in exactly the same way, but they all follow the same format and have some specific features in common. Whether watching niche video games on Twitch, joining a live cycling workout on Peloton or watching a cam model on Chaturbate², the nature of the viewing experience is remarkably similar, even if the content is starkly different.

² Warning: explicit content!



The key features we are specifically concerned with, and which we will refer back to throughout this report are:

- ■ ■ A live experience: whatever is being watched – whether it’s someone playing a video game or performing sexual acts – it is happening in the moment, and is a unique and addictive experiential aspect of live streaming
- ■ ■ The presence of other viewers/audience members: the live stream is open to multiple viewers at any one time. It might not be entirely public – e.g. you may have to be a member of a site to view it – but it’s not a private viewing
- ■ ■ There are ways for viewers and streamers to interact with each other: all the examples here have feedback mechanisms between the streamer and viewer. Most often this takes the form of a chat function, but there are other mechanisms too, such as sharing live workout data or even enabling viewers to control objects the streamer is interacting with in real time (mostly sex toys)
- ■ ■ Monetisation: the platform enables streamers to generate income. This can take the form of direct payments from the viewer to the streamer, or indirect payments like subscriptions required to view the stream, advertising revenue or marketing and sales of merchandise. This is something that isn’t available on the more ubiquitous social media platforms like Facebook Live and Instagram Live

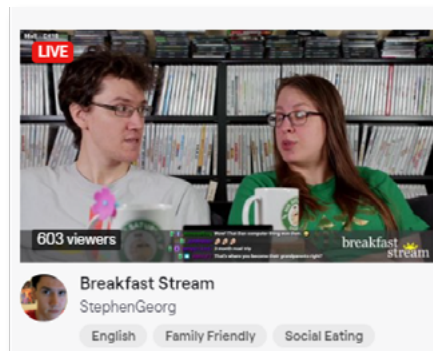
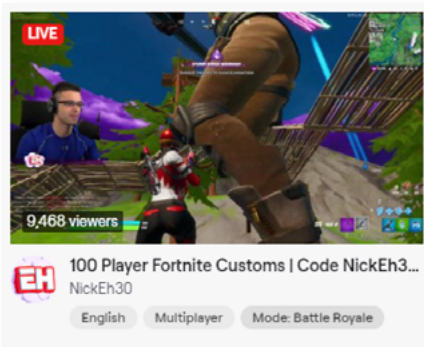
These are the features that make live streaming a curious combination of paid-for content creation and personal connection. We’ll go through these features in more detail throughout this section.

WHAT DO PEOPLE STREAM?

Everything. If there is video content of it online, it's likely someone is live streaming it too. Some categories of live streaming are much more popular than others – video games make up a significant proportion of online live streaming, but there are a host of other live streamed content available, and platforms are not necessarily prescriptive about what kind of content their users stream.

There are sites that were originally dedicated to gaming, but now host a huge range of content, including games, streams of daily life, cooking streams etc. On Twitch, for example, you can access the 'just chatting' category which includes an eclectic mix of streams such as: 'Relax with me – Purr and Lick', 'IRL day out!', 'Cozy Stream', 'Cleaning and Chit Chat', 'Goat Milking' and 'Breakfast' – to name a few.

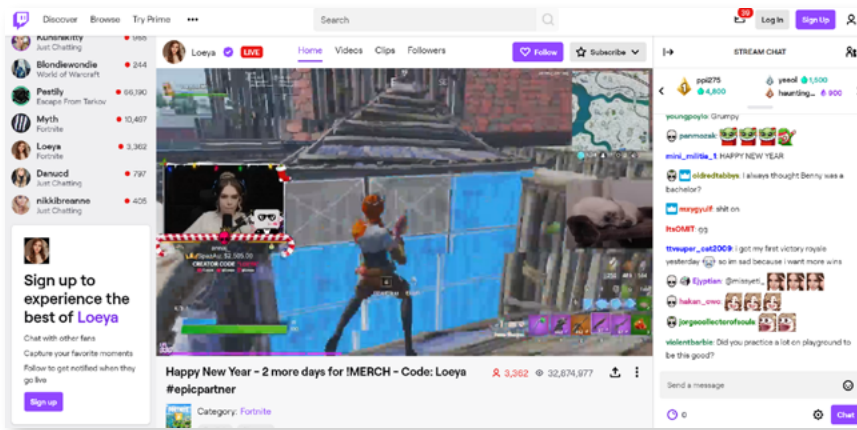
New sites are popping up all the time to cater for specific genres of streaming. 'Streamingchurch.TV', 'churchstreaming.tv' and 'churchservices.tv' are all, unsurprisingly, offering very similar platforms for ministers to broadcast their religious services.



WHAT DOES 'LIVE' STREAMING LOOK LIKE?

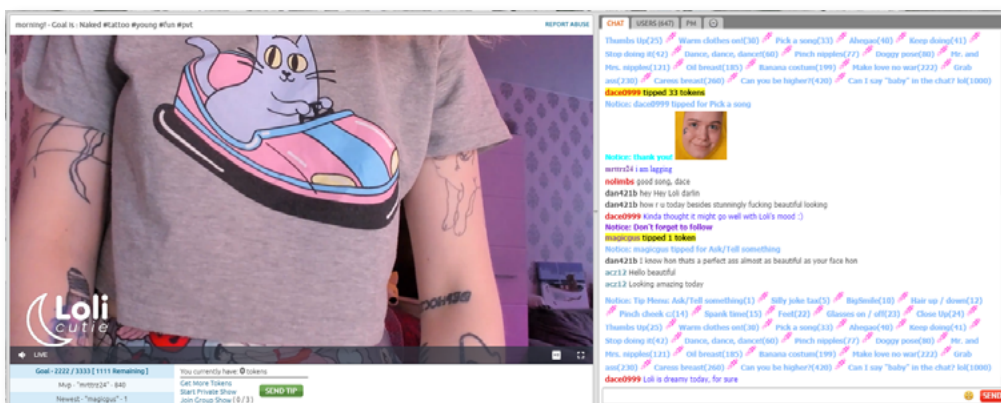
Live streams tend to have two subjects of content – the streamer themselves, and the thing they are doing, watching or playing. The streamer themselves are often the attraction, with the content they're streaming facilitating their own performance.

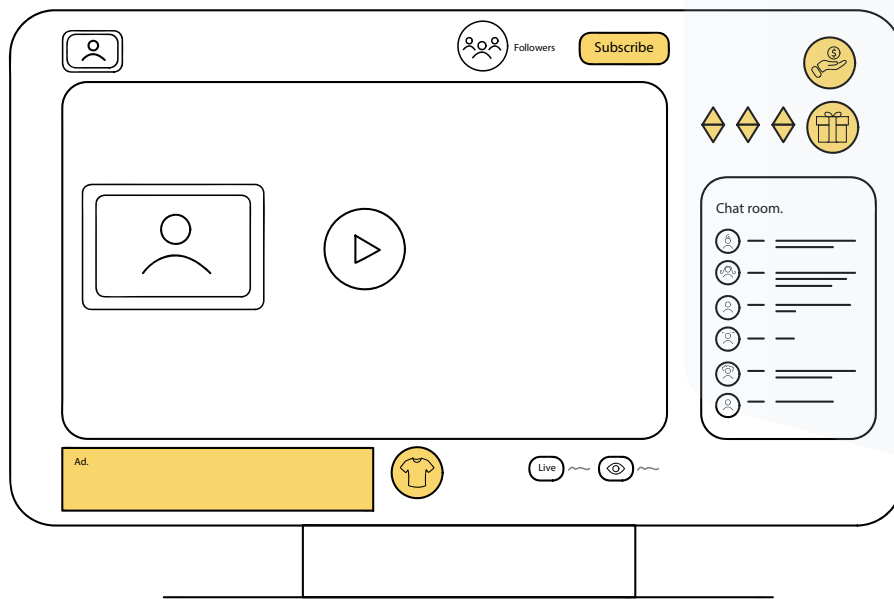
When we talk about live streaming video games, it's likely to look like this:



The screen from the game the streamer is playing is the main focus, but more often than not there will be a parallel video stream of the streamer themselves while they play the game.

In other forms of live streaming the stream might simply focus on the streamer. In which case, the stream might simply focus on the streamer. During a live spinning class with Peloton you'll be looking at the instructor; if you're in a live online Bingo chat room, the game you're playing will take up most of the screen; if you're watching a cam model, they are going to be centre stage.



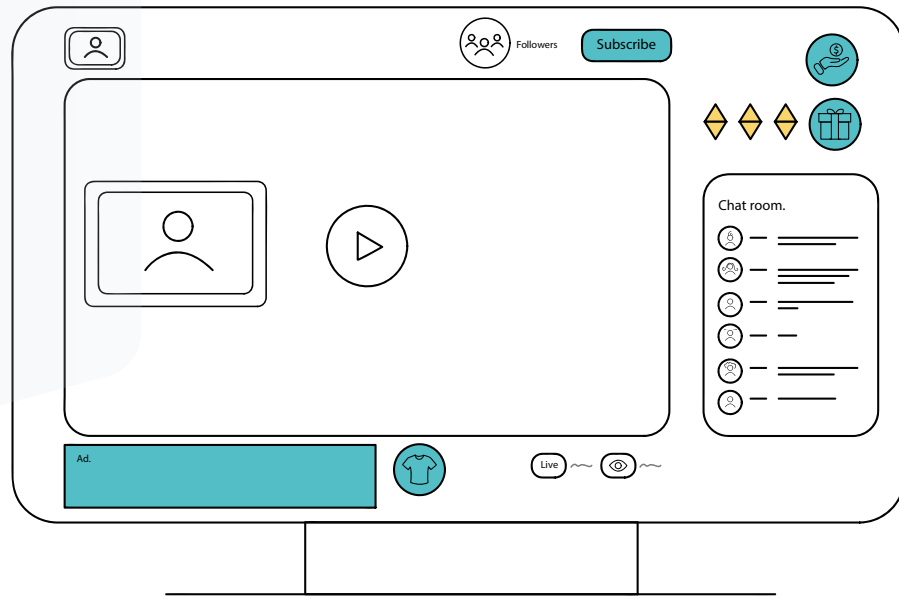
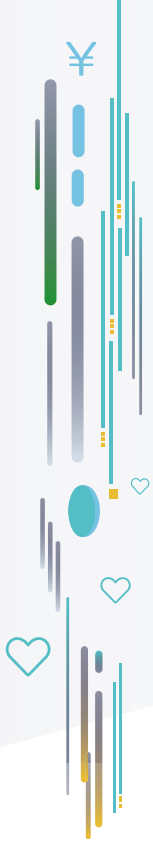


WHY IS 'LIVE' IMPORTANT?

The 'live' element of live streaming is, for obvious reasons, particularly important. But why is it so crucial?

There is obvious value in viewing something live. From fostering a greater sense of connection to other viewers, even without direct contact with them – like live sport – to helping us feel totally up to date, like the evening news. Live content gives us something that pre-recorded content cannot – it fosters a sense of authenticity.

When it comes to live streaming, these same values are present, and are in some ways felt even more keenly. In particular, the live experience enables and improves some of the other elements we discuss here, like interaction and the feeling of a shared experience. Crucially, it also creates for the viewer a more real or raw experience, which is something many people value. Vloggers and YouTubers have existed for a while. They generate close knit fan bases and enable communication between viewers. But by being live, streaming has been able to take things to the next level – providing an instant and reciprocal connection between the streamer and the viewer.



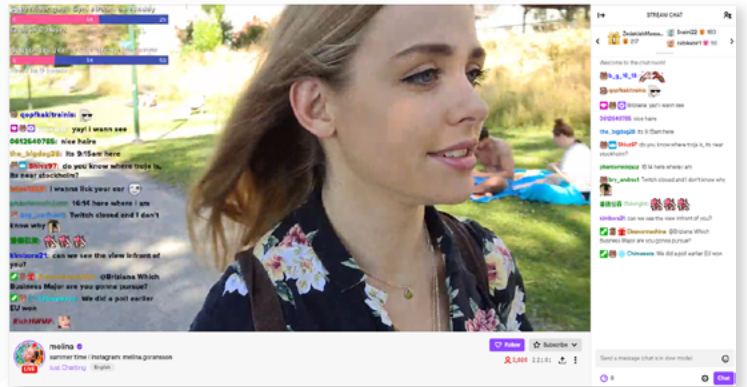
WHAT IS A 'SHARED' VIEWING EXPERIENCE?

The kinds of live streams we are exploring here are not private shows. They are performances open to anyone, within reason, who is interested in viewing. In terms of access, this type of live stream is no different to many other forms of online video content in that you can either watch for free, with the right subscription, or with a login.

Your co-viewers could be anywhere in the world. There could be just one person, or there could be thousands of people tuning in to watch the same thing as you. You might not know a single one of them, or you might know all of them well enough to count them as friends. A record breaking Fortnite livestream by Ninja and Drake on Twitch attracted 628K concurrent viewers. In comparison, a more typical streamer, like Chloe who we spoke to for this piece, gets on average 50-70 concurrent viewers, many of whom she's met in real life.

Live streaming platforms ensure that this is visible information, not only showing the number of people watching at any one time, or those who have watched the streamer before, but also by enabling viewers to interact with each other if they want to. This shared experience opens the door to a potential

This shared experience opens the door to a potential connection to the streamer themselves



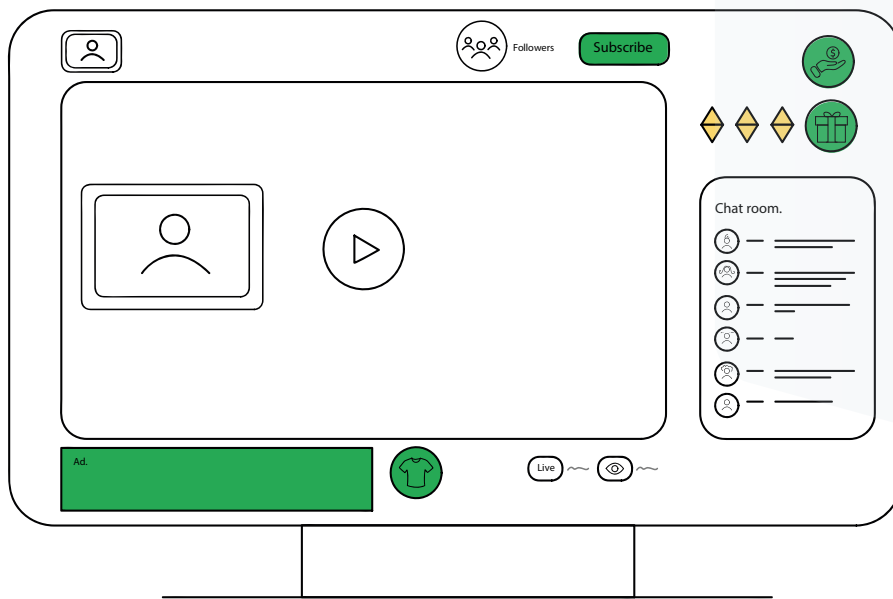
connection to the streamer themselves, and to the wider community of viewers. Ultimately, the wider audience all have a common interest in the streamer and the content, and people generally like talking to others who share their interests – it is a key tenet of community.

As well as sharing a general interest, viewers are sharing specific events and moments as they unfold:

- ■ ■ In gaming streams, this might be a particularly impressive or funny piece of gameplay.
- ■ ■ In a chat-based stream, it might simply be the host doing or saying something unexpected or particularly engaging.
- ■ ■ In online Bingo, it might be a member of the community winning big. Everyone is able to share in the moment – laughing at the same joke or celebrating the same win.

This live interaction not only gives people a sense of community and shared interest, but also a sense of control over what they're consuming, and a degree of reciprocity in this consumption. Unlike television or other pre-recorded content, live stream viewers are not passive, they are active.

For some viewers, the opportunity to take part in a group chat during the stream is a big attraction in itself. They generally enjoy the largely good-natured 'banter' between viewers and even share in-jokes. Sometimes the streamer might get involved in their conversation, too, which is part of the interactive element of live streaming.




HOW IS IT 'INTERACTIVE'?

What really sets this medium apart from other types of media, and makes it such a unique viewing experience, is the interactivity between viewer and streamer. It is the direct interaction between viewers and streamers that cultivates such a strong sense of connection.

This interaction occurs in a range of different ways, and there are a number of different mechanisms in place across live streaming platforms to connect viewers to streamers. The most common way this feedback exists is in a chat function where streamers can see and respond to what you're saying. You type something, and the streamer can read it and type something back or say something in response whilst live on camera.

... a streamer with thousands of people watching from all over the world replying to your comment, laughing at your joke

These interactions can feel incredibly intimate and uniquely personal for viewers – a streamer with thousands of people watching from all over the world replying to *your* comment, laughing at *your* joke. Streamers can type back, or quite often talk to/about you directly. Even if a viewer doesn't interact directly with the streamer or other viewers, seeing those interactions unfold



in real time can help to strengthen their perception of the streamer-viewer relationship.

Engaging with viewers is a vital part of live streaming and the extent to which streamers actively cultivate relationships with their viewers has direct consequences for their viewing figures and income.

HOW ELSE CAN PEOPLE FEEDBACK?

Streamers can see what you're paying:

We discuss how the monetisation element works in more detail below, but if someone is watching a live stream there is a good chance the streamer knows how much money they have invested in being able to watch their stream and engage with them. Whether it's their subscription – of which there might be different tiers – or tips they pay in real-time, the streamer has access to this information in some form so they can be sure to thank people for their support

They can see what you're doing:

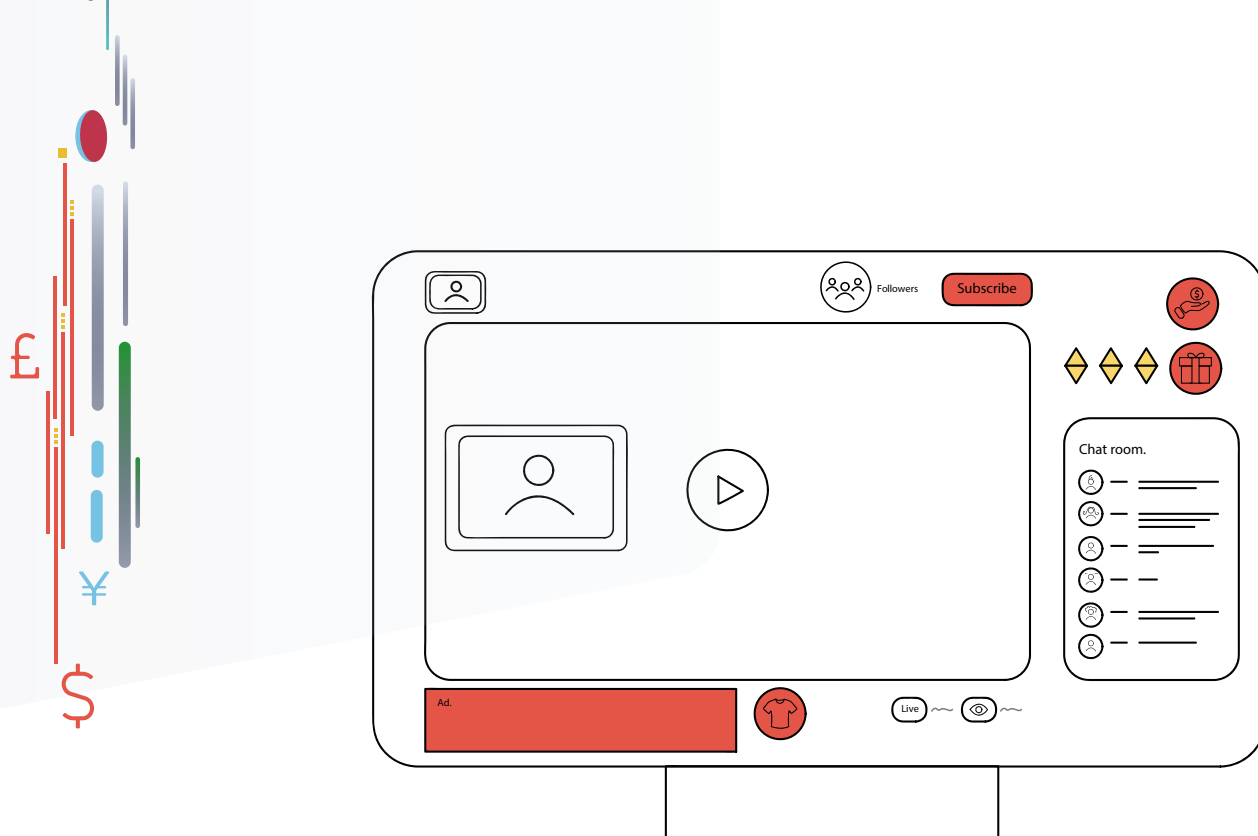
If there is data being collected on your side of the screen, there is probably a way to share it with the streamer. The interactive exercise classes offered by Peloton provide a great example of how platforms can use viewer data in real time to create an interactive experience. Peloton connects users to the class instructor in real time – the instructor can see who's in the class, who has a class anniversary (e.g. 100th class), who has a birthday, or other notable stats that could be shouted out to members of the class. There's a leader board, too, so the instructor and viewers know who's cycling hardest.



STREAMERS CAN EVEN FEEL WHAT YOU'RE DOING:

Being connected online offers opportunities to do more than just communicate and share data. Streamers can use haptic technology as part of their live streaming show, enabling viewers to experience as near to physical interaction with streamers as possible. Most cases of this being built into a live stream seem to come from the porn/sex industry at the moment, with viewers able to take control of sex toys. This element of control of your experience is unique and can make the process seem more real to viewers.

Some platforms also enable streamers or chat hosts to talk to viewers one to one, although usually not at the same time as hosting a stream that's open to other viewers. In the world of adult entertainment, these are simply private shows. With online bingo streams, this function is generally reserved for safeguarding interactions.



HOW DO THE STREAMERS MAKE MONEY?

Finally, a common feature of the kind of live streaming experience explored here is the ability for streamers to monetise what they are doing. The introduction of a financial element is an important one when it comes to thinking about the value, in a literal sense, of the connection viewers get from watching live streams.

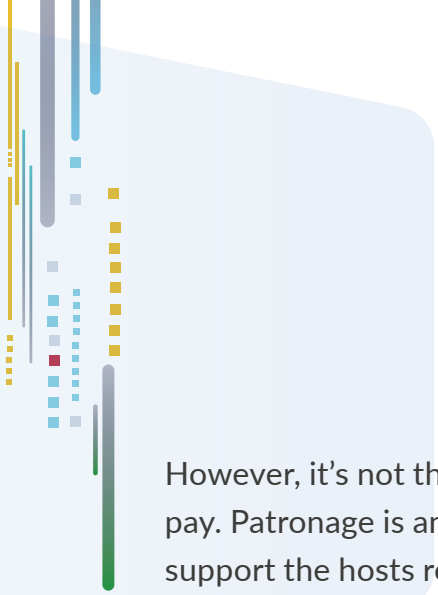
It's worth noting that, as is true for as all other forms of user-created content and art, the vast majority of creators are not making a living from streaming, and pursue it as an interest rather than a job. Just like YouTube personalities and Instagram influencers, only a tiny proportion of people aspiring to earn a living make any real money from advertising or direct subscribers.

HOW DO PEOPLE PAY?

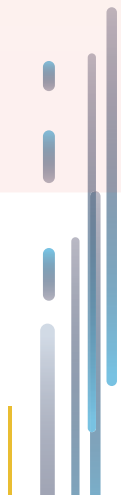
Each platform has its own specific way of dealing with payment, and similar mechanisms are often called different things. The basic ways someone can generate revenue from live streaming are:

- ■ ■ ■ ■ ■ ■ ■ ■ ■ Tips: viewers can send smaller amounts of money (although there's no real limit) to streamers whenever they like, most often while they are streaming live
- ■ ■ ■ ■ ■ ■ ■ ■ ■ Subscriptions: regular payments to access a streamer's content. There are often different tiers of subscription, with the more expensive ones coming with add-ons like extra content, merchandise or some kind of public recognition so that others can see which viewers are the biggest supporters (financially) – this can give some viewers a degree of status, which can be appealing
- ■ ■ ■ ■ ■ ■ ■ ■ ■ Gifting: many streamers will have a wish list of gifts/products that viewers can purchase for them instead of giving money directly. In some cases, people may also send gifts outside of this formalised system. This can add a deeply personal tinge to the viewer/streamer relationship
- ■ ■ ■ ■ ■ ■ ■ ■ ■ Merchandise: many streamers have merchandise for sale. The actual merch will vary and depend on the streamer themselves, but it can range from t-shirts to sex toys modelled on their own genitals, and everything in between
- ■ ■ ■ ■ ■ ■ ■ ■ ■ Advertising revenue: just like other online media platforms, streamers are able to generate revenue through advertising, with many advertisers willing to pay good money to have their products and brand associated with individual streamers – not unlike advertising products through Instagram 'influencers'
- ■ ■ ■ ■ ■ ■ ■ ■ ■ Product placement, sponsors and signposting to other 'services': alongside passive advertising sitting next to streaming content, streamers themselves may have one-off or ongoing deals in place to promote products and brands to their viewers – often offering discounts or special offers in the same way other content creators do (e.g. YouTube videos and podcasts)





However, it's not this direct feedback alone that makes people want to pay. Patronage is an important element in itself, and many viewers want to support the hosts regardless of the recognition they get personally. The strong connection that many viewers feel to hosts – sometimes built over years of tuning into their streams and seeing them develop as hosts, players and people – means that supporting them is important to viewers. “Your streamer, you want them to do well”, said Nick, a gaming stream viewer. It's the same sense of loyalty and patronage that people might feel to a local artist or sports team, where people take pride in their development and growth as well as their artistic output. However, it's even more personal than this. A relationship with sports person is largely one-way. It isn't usual reciprocal, at least not in essence. This is why a supportive relationship with a live streamer has a uniquely personal character.





SECTION 3

THE USERS


WHO ARE THE PEOPLE INVOLVED?

THE STREAMERS


A streamer's product is themselves – they trade in personality, looks, and talent. Often streamers share very personal details with their viewers and spend hours a day interacting with fans, both whilst streaming and afterwards. From letting your fans pick what colour you dye your hair next, to enabling them to take control of a sex toy the streamer is using, this side of streaming can offer the viewer a real and tangible sense of control, involvement and impact.

... creating your own community and set of fans.


Despite the level of dedication involved to be successful, streaming can be aspirational to many, particularly on sites like Twitch with young people hoping to make it big and stream full time. Live streaming is seen as a way to do something fun for money. Streamers can choose their own working hours, are their own boss and can take opportunities to earn extra money through special shows or partnerships with brands.



For some, this has become their sole source of income, like Twitch streamer Chloe who streams for 4-5 hours each day and continues to engage with fans and manage her profile on top of that. Other types of live streaming actively employ people to present or run the streams, including trainers for Peloton or moderators on Jackpotjoy. For others, streaming is a part-time way to supplement the income of a full-time job, like cam model Roxy who also has a day job that pays well.



The streamers we spoke to all appreciated the social aspect of streaming, often getting into it because of the draw of creating your own community and set of fans. The cam girls we spoke to would regularly spend large chunks of their streams chatting rather than performing. Chatting similarly takes centre stage for Chloe's gaming streams as she acknowledges she isn't one of the 'athlete' style game players who viewers will watch to appreciate top-level game play. Her viewers are there for her company.



THE VIEWERS

There is no 'typical viewer'. The huge choice of streams means that there is an extremely varied audience, including churchgoers, exercise fanatics, gamers, knitters or someone with an unusual fetish. All use streaming sites with the same basic principles and for overlapping reasons – namely, to be entertained and to connect.

Despite the unifying reasons people watch streams, viewers' actual behaviour when watching streams varies enormously. The varying behaviours exhibited include:



Moderators: (not including official moderators on gambling sites) these are fans that have either given themselves the role of unofficial moderator or have been selected by the streamer. Most common on camming sites, they are present during all or most of the streams, defending streamers from criticism and muting commenters who break the rules. For example, Roxy, a cam girl, has a moderator to make sure people aren't being rude or nasty on her feeds. On camming sites these are often older men who want to impress the model but who are very aware there will be no face to face relationship



'Lurkers': viewers that don't post comments themselves but enjoy observing the communication, like one viewer who told Roxy he had been watching her for a while but only began chatting when shaving was discussed – his fetish



Regular chatters: streams often have regular fans who will be extremely active in the comment thread. They tend to be seeking attention from the streamer and want others to know they are fans. They'll carry on lines of conversation from past streams, ask the streamer personal questions – “is your baby teething, Chloe?” – and have typically built connections with other fans



Trolls: occasionally there are people who are there to be nasty, though these are seemingly rare. Trolling, particularly on Twitch and camming sites, manifests in physical insults. Streamers often feel that trolls are more likely to be teenagers or young people



Passive viewers: there are of course viewers who will have no interest in chatting or reading comments. Some Twitch streams, particularly for gaming, are geared towards watching gameplay, with the streamer rarely interacting with the audience. And on bingo sites there are options to disable the chat function



SECTION 4

WHAT'S IN IT
FOR THEM?





An 'authentic' and in the moment viewing experience

Part of the appeal of streaming for many viewers is the sense of 'authenticity' it provides from being live, coupled with streamers' efforts to make sure viewers feel they are getting to know the 'real' them. On Twitch in particular, this is tied up to the aspirational side of streaming – if this seemingly normal person can have a popular stream and generate a whole community and make a living, maybe I can too – or at least be part of their friendship circle.

The 'live' element itself is key, with the gaming stream watchers we have spoken to finding content more 'genuine' and unscripted. "You know all their reactions and behaviour is genuine because it's happening live", said Sarah, a gaming stream viewer. This all leads to a stronger feeling of connection – viewers can join in and

... viewers feel they are getting to know the 'real' them.

respond to what is happening in real time and receive attention back from other fans and the streamers themselves. While some viewers just have streams playing in the background as light entertainment or are only interested in the streaming content itself, others feel they have built strong personal relationships through actively participating in stream chats, with both streamers and other fans.

Many viewers and streamers we've spoken to talk about streaming as something that provides a sense of community. Viewers can regularly watch a particular streamer, getting to know both them and the other fans. "With live streams I can join in...it's fun being able to add to the conversation" – Jake, gaming stream viewer. Streams often revolve around a shared interest or hobby, or likes and dislikes – whether that's a video game, gambling, or a sexual fetish. This makes it easy to generate conversation and rapidly build relationships: "they [the streamer] might not notice your YouTube comments but they might notice your livestream chat" – Jake, gaming stream viewer.

The live aspect of streaming is a huge draw for audiences, comparable to watching live sport: "it's on par with football...you get the crowd aspect and everyone will cheer when something good happens" – Nick, gaming stream viewer.






ONE-SIDED RELATIONSHIPS

Viewers often form parasocial connections with streamers

A parasocial relationship is a one-sided relationship, where one person spends emotional energy, time and takes an active interest in another. Whereas the other party is completely unaware of the other's existence. So in our context – a parasocial relationship is one where the viewer spends time, energy and usually money to have a connection with the streamer, but the streamer often has no idea they exist beyond their username (this is especially true with streamers who have thousands of viewers, and where the viewer isn't active in a the chat thread).



From being told “well done” by a Peloton trainer to being able to buy a replica of a cam girl’s vagina, there are lots of ways streamers can encourage a sense of connection.

Many viewers feel like they’re becoming friends with the streamer, despite an offline relationship rarely being realised: “he’s so funny, he’s just such a joker... You really get to know the person...I feel like I know him as a friend” – Nick, gaming stream viewer.

Streamers work hard to make sure their viewers feel connected to them. The cam girls we spoke to, as well as Twitch streamer Chloe, provide a lot of personal information about themselves to their viewers. Chloe’s followers regularly see her baby and chat to her about her private life. Cam girl Roxy has an Amazon Wishlist (including her real name and home town) which allows followers to send her gifts, and Faye, also a cam girl, lets fans buy a replica of her vagina to use while watching her streams. Even the Bingo moderators, who never show their faces and have multiple fake names, shared aspects of their lives with the people they were speaking to – chatting about holidays they were going on, their families, and what they were doing that day.

On other occasions this is a purely parasocial relationship, with viewers pursuing personal connections with streamers that can never be reciprocated outside of the streaming sphere

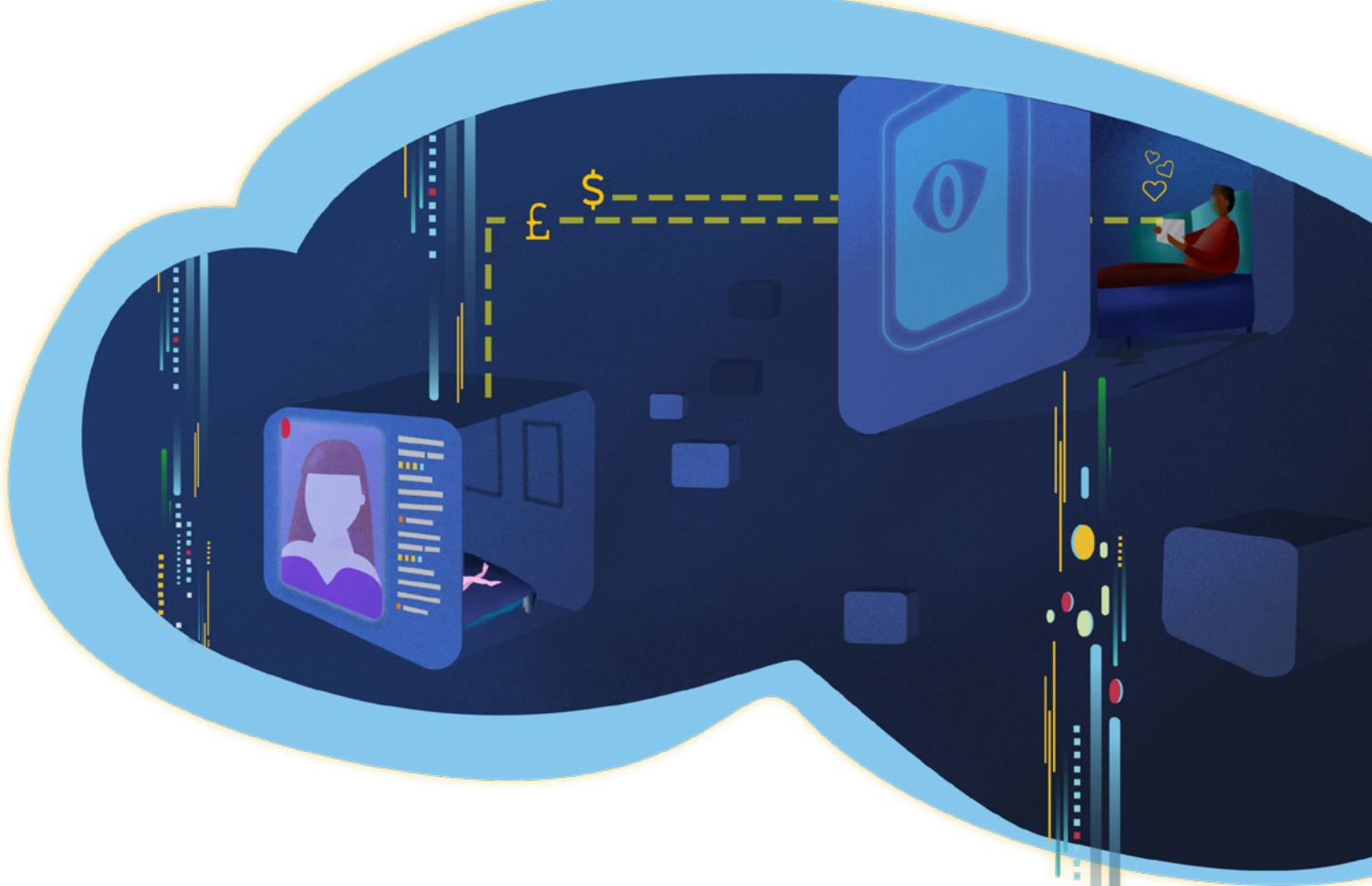
There is also often the opportunity for viewers to exert some control over what the streamer does or what happens during the stream, further cementing the sense of a real-life relationship. This is particularly common during cam model streams where viewers can tip for the model to perform a certain action (stripping, dancing etc.) or to control a sex toy (increasing the speed on a vibrator). Other streamers also often allow viewers to get involved with what’s going on. Once a month, Chloe will allow her audience to vote for which colour she will die her hair.

As a result of this sense of connection facilitated by mechanisms on the platforms, some viewers feel they have developed strong personal relationships with the streamer, and this is sometimes reciprocated, with gaming streamers like Chloe feeling very grateful to the fans who support her, providing opportunities for meet and greets at events. On other occasions this is a purely parasocial relationship, with viewers pursuing personal connections with streamers that can never be reciprocated outside of the streaming sphere, like cam girl Roxy's regular viewer who expressed his sadness at learning she had a boyfriend.

There are viewers who do struggle with relationships offline and streams can provide welcome contact and friendship. The Bingo moderators in particular felt many of their players relished the connection on the chat:

“ Some people tell you that they're lonely, especially around Christmas. People will say they're on their own and not seeing people until New Year. Sometimes you don't think about that, you assume it's just a nice conversation and then they log out and carry on their nice normal life like I do, but sometimes they actually don't have that and they really enjoy the time they have to have a nice chat. You might be their only contact. ”

ELLEN, BINGO HOST.



BUYING INTIMACY

Fans pay for an ‘authentic’ connection to the streamer

Any streaming relationship is, of course, transactional. All the streamers we spoke to are doing this to earn money. Many viewers do recognise that this is a job for the streamer and that to continue to be able to stream, they need to be paid. Sam, a gaming stream viewer, turns off his ad-blocker when watching his favourite streamers as he hopes this means they can make money from ad revenue. Fans will send money to streamers, whether via subscriptions, or by tipping, to show their support and to keep that streamer going. Similarly, payment can be compulsory for participation – for live bingo you have to pay-to-play, and on sites like Chaturbate you need to pay for the model to perform certain actions during their livestream or to receive private photos and videos.

For others, though, payments are made to increase the sense of connection and to attempt to build a relationship with the streamer – as is the case with many of Roxy’s Snapchat followers who often just want to chat. Indeed, on some of the forms of live streaming the payment mechanism is geared towards providing



increased connection with the streamer. Most forms of payment will result in recognition during the stream, whether that's an icon in the chat, a direct mention from the streamer or a tipping leader board on a streamer profile. This often results in thanks from the streamer and means other fans will see that you have contributed and might praise you for doing so. Whether this actually fosters an authentic form of connection or whether it just raises status isn't clear. What is clear is that for some viewers, it at least simulates this form of connection.

Viewers can often also send private gifts, indicating the desire for a more direct relationship with, and perhaps the approval of, the streamer. One of cam girl Roxy's fans buys her lingerie from her Amazon Wishlist, he also hinted, as was mentioned earlier, that he has feelings for her and made it known on the chat that he was upset when she did a show with her boyfriend.






THE COST OF SELLING INTIMACY

Being 'on' all the time can take its toll of streamers

The viewers' need for connection can be incredibly demanding on the streamer. There's an expectation from viewers that streamers should be constantly switched on, often this means putting on a 'game-face', however they are feeling in reality. This pressure can be draining. Both during live streams and afterwards, viewers often want constant attention, and expect the streamer to be saying and doing 'the right' things – which can make it difficult for prolific streamers to switch off.

There is an immediate feedback loop between viewers and streamers – viewers can easily make it known when they're not happy with what's happening on screen whether through comments or quitting the stream. Chloe's viewers will frequently pick up on when she's not being upbeat and will call her out on it, similarly Roxy struggles to stream when she's feeling low as she knows this won't go down well with viewers. The necessarily performative nature of streaming can therefore be incredibly draining.



There is an immediate feedback loop between viewers and streamers

This unrelenting feedback can also become quite unpleasant for the streamer. People can be nasty, posting rude comments – something the cam girls we spoke to had to deal with regularly. Twitch streamer Chloe occasionally receives nasty comments about her appearance, and now tends to wear jumpers or loose-fitting clothes to avoid this happening. She feels she's quite thick skinned and often ignores mean comments but it has affected her in the past: "if you've got twenty odd people coming and saying you're fat and maybe you're not feeling great that day and you're like 'why are they saying this? Are they saying it because it's true?' – I think you get better with time."

The real cost of live streaming

Many streamers work so hard and put up with demanding fans because they are hoping to make it big. But in reality, it's incredibly hard to make a living through live streaming. Streaming platforms often take huge cuts of any money made by the streamer. Twitch usually takes 50% of earnings made from subscriptions, and cam sites are even worse, with Faye telling us "I was disgusted by the treatment of models. StreamMate: they take 75% of your money, ManyVids was the same. It's rubbish treatment." Streaming sites sell the hope of celebrity but regularly leave streamers making less than minimum wage.



SECTION 5

CONCLUSIONS

CREEPING DIGITISATION

As a society, we're depending more and more on online services to serve a myriad of different functions and to satisfy an increasing variety of needs. People are spending more time alone. We're less connected to the people around us than the previous generation, and they're less connected than the generation before them. All this, despite the fact we live in a world in which technology has made it feel like we're more connected than ever, and in new ways. Indeed there's a creeping digitisation of almost every aspect of our lives, from entertainment to dating; communication to sex.

People are spending more time alone.

The rise of social media and 'influencers' has caused the blurring of celebrities and everyday people. Streamers are attaining celebrity status, and like an influencer, what they present on screen is largely a performance, sometimes even a façade – a glossy, smiley version of themselves.

'LOVE' ONLINE

Dating sites have been around for years but are mostly used with the end goal of a physical relationship. Now, however, we're conducting more and more of our relationships solely online, with services like live streaming satisfying the need for both connection and sexual gratification without anyone having to leave their own home. Streamers are capitalising on this – selling the illusion of intimacy or authentic connection. The viewers do not always recognise, or care, that this is often contrived.

THE COST OF BUYING AND SELLING INTIMACY

When money changes hands in return for a sense of connection, is this a case of people paying for friendship, or is it just giving people a new way to connect and generate income? Streamers often hope to make it big but more often than not struggle to bring in any meaningful income due to the percentage cuts of the platforms. As a result, they often have to commit hours every day to building their fanbase, managing their relationships and presenting an idealised image. Viewers may feel they are forging meaningful relationships with streamers and other viewers, but does the chance of real-life connection suffer as a result? And do the high percentage cuts the platforms take mean that streamers actually have to work longer and harder than they otherwise would, with more pressure and a demand to be constantly 'on' as well? Who is benefitting the most from the live streaming market?

WHERE IS THIS ALL LEADING?

What is next? The increasing digitisation alluded to earlier begs the question of where this is all leading, and what the implications are for intimacy, connection, human relationships and more. The growth in popularity of streaming platforms provides an important example of how rapidly the media we consume is changing, and how it reflects changes in society more widely. It also raises some important questions: are people spending more time alone because of societal shifts, and reaching online for connection? Or does this provide an easier way to feel that same sense of connection, reducing people's impetus to forge offline connections? And, notably, people are willing to pay for these novel types of connection. Therefore, is this type of parasocial interaction replacing real life connection, leaving people to become too attached to their favourite streamer – buying them gifts; sending them money, maybe with the often mis-placed hope of a real-life relationship?

As stated in the introduction, we feel these are important questions relating to an increasingly present and unignorable topic, and that despite this, there is a dearth of attention being paid to it both within public discourse, and at the level of policy and regulation.

The background features a dark blue gradient with several vertical bars of varying heights and colors (purple, teal, blue). On the left side, there is a small line chart with three data series: a red line with a peak, a yellow line with a peak, and a blue line with a peak. The text 'RESPONDENT PROFILES' is centered in a white, glowing, sans-serif font.

RESPONDENT PROFILES

All respondents have been given pseudonyms




CHLOE, GAMING STREAMER (TWITCH)

Chloe began streaming on Twitch 5 years ago when the platform was less popular and it was easier for new people to get discovered. It started off as a bit of fun when she wasn't at work as studio floor manager at a shopping channel. She realised she could make money from streaming and found her job unfulfilling, so decided to give full time streaming a go. Though it is less secure than having a salary, Chloe says she 'wouldn't look back right now.' Getting an income from streaming may be less secure, but it is also more flexible. Looking back at the days she had a full time job, she feels it would be strange to go back to having a set amount of money coming in – one she couldn't increase by putting on 'special things or events.' It's this control over her earning that Chloe enjoys, and with the money she gets from her viewers through tips, donations and events she is able to pay the bills and live fairly comfortably.

This total control over your income, however, has its cons. 'Some people over work,' in streaming circles it's called 'the grind.' Chloe says she has seen some streamers who stream for 12-13 hours per day – sleeping for just 5 hours. She hasn't reached those dizzying heights yet. She streams for 5 hours a day, 6 days a week to approximately 70 viewers at a time, playing a wide range of games like Animal Crossing, Minecraft, Fallout and Dark Souls, while talking about her life and having conversations with her followers. She isn't a serious gamer like a lot of other gaming streamers – her stream focuses more on chatting and having fun than demonstrating gaming skill.

Streaming has all but taken over Chloe's life. 'To be honest like, most of my life at the minute is streaming. I wake up I stream.' When she does go out for the day she'll still be a regular presence on social media – posting photos and telling her followers what she's up to, even if she's with a friend. 'So there isn't really anything that I do that I don't post online to be honest.' Chloe doesn't consider her life particularly interesting and says she doesn't get up to much. This means



that when she does do things, she posts a lot to try to demonstrate 'how interesting I am.' This extends to the glamorous façade that is often associated with social media users. Chloe says she puts across a curated image of herself online, when in reality, she is in her dressing gown until midday most days.

The sense of connection she experiences from streaming is so intense as to be verging on 'addictive.' She describes a very real and important community that has built up around her. She has made friends and connections through streaming that have become important to her. However, it can sometimes seem a fine line between connection and engagement, and dependency. Chloe describes the feeling of guilt associated with wanting to take a holiday or some time off. There is a 'real fear that if you leave people will forget about you, there's a pressure to stay current and stay at the forefront of everyone's mind.' This kind of personal relationship, though it has its pros and cons, is undoubtedly unique in the context of the online landscape, and can even serve as a replacement to that kind of connection in 'real life.' For instance, many streaming fans deliberately seek out streamers with less followers as they feel 'they're being heard' more. 'Say you're by yourself all day,' says Chloe, if you click on a stream, say hi to the streamer and the streamer says hi back, you get the 'sense that you matter to somebody, which I think a lot of people like.'

Chloe even recognises a social responsibility entailed in her streaming. Twitch is 13+, and if you're under 18 you're supposed to be accompanied by an adult. Knowing this is unlikely, Chloe takes care not to swear, for example, as she's aware she may sometimes be streaming to 'a bunch of kids.' This means that, for her, there's 'a role model aspect' to her streaming – even a responsibility of 'trying to set a good example for the next generation.'



FAYE, CAM GIRL

(FLANE, PORNHUB, CHATURBATE)

Faye has been a cam girl for about 2 years. She was running a body waxing business at the same time but is now making the shift to camming full-time. With a background in being on camera performing and modelling, she felt comfortable making the transition into putting everything into her brand and being a cam girl full time. In the earlier days, Faye was doing a lot of stripping which was taking up a lot of energy and she decided that she didn't want to rely on it. She wanted the 'choice between camming and stripping.'

After trying some different things, she now does a lot of one-to-one shows – which have increased by 40% since the beginning of lockdown – as well as public streams and uses sites like YouTube and TikTok to post non-explicit content such as sex toy reviews, body wax videos and dancing. Faye uses a wide range of streaming sites to make sure she's picking up as many viewers as possible, and that she has a backup if her profile gets blocked.

She uses a number of platforms to manage her brand – there is nothing centralised. Disgust at some sites' treatment of models has also compelled her to leave a few. Sites like 'StreamMate take 75% of your money.' Faye also described an instance where a customer was using a fake credit card or disrupting a payment, and AVN Stars actually covered a payment for her, which was 'unheard of.'

Faye's main income stems from subscription sites, as well as for sale clips and tip options. The more mainstream platforms like TikTok, YouTube and Instagram are less lucrative, and less willing to associate themselves with adult content. Platforms like Instagram and Periscope have often deleted her content for this reason.

Her fanbase consists of a lot of regulars. Some of these come from when she started out on a community dating-style site from which she was eventually kicked off because she was asking for tips, which wasn't allowed. She made a lot

of money from this site – and collected some fans along the way, too. Success often comes from sites ‘where men initially think they’re there to genuinely meet people.’ However, she also says that a lot of her online fans become online fans after meeting her in real life.

Her customer base are mostly men aged 25–45 and she streams foot fetish, ‘fem dom’ and milf porn. She thinks a lot of her fans do hope they will start a real-life relationship, although she never meets her online fans offline—it’s always the other way around—some of her customers from her strip club days now watch her stream. Faye suggests that meeting her fans in real life would only end in them being let down, as deep down many of them would like to think ‘they have a chance with me’.

So there is a clear line drawn between Faye and her fans. However, this does not diminish the appeal she knows she has, and the methods she employs to make people feel more connected. She describes herself as ‘goofy’ and unashamedly ‘herself’ whilst streaming to her fans. She also has at ease in front of the camera – something which cannot be affected or contrived. ‘I’ve been on camera my whole life...it’s part of my sexuality – I enjoy being filmed’, and have always had ‘a proclivity’ to ‘have videos and pictures of myself’.

The money varies depending on the product. She does a lot of ‘custom video requests’, which usually consists of two or three minutes of video, for which she might receive ‘40 or 50 bucks’. She also does public streams and groups rooms, but acknowledges that you have to be careful to keep the most explicit things behind a paywall – both for verification reasons, and also because not do so would mean diminishing the exclusivity of her most valuable service. Her income has shifted and adjusted to the challenges presented by COVID-19. Beforehand, ‘waxing made up about 40% of my income’. Now, ‘sex work is 100%’ of her income, and March was a ‘good month’. This isn’t as a result of a fresh crop of lockdown-induced clientele; it’s more as a result of her more demanding existing fanbase. Ultimately, Faye’s five year plan concludes with her being able to generate a ‘passive income stream’, where she can still make money from Faye as a brand but without having to actively do as many shows or new content.

As a way of life, it is 'giving me all I want' at the moment. 'It's totally supporting me...I have children and one going to college', This work however, is never without its challenges. Faye talks about the responsibility she feels to keep people happy – 'you do a lot of smiling and nodding'. And whilst it is paying the bills and 'then some', it is also 'very draining, very volatile', and full of 'rejection'. To be in this line of work – 'you need a tough skin'.



ROXY, CAM GIRL

(SNAPCHAT, ONLYFANS, CHATURBATE)

Roxy is a 23 year old accountant by day and a cam girl by night. She's only been camming for a few months. She was too nervous to try it whilst she was in college, despite being intrigued. Then, working full-time, she decided to give it a go for 'some extra cash'. She was nervous, worried about her body, and concerned she'd have to 'be naked and touch myself in front of everyone' – she was 'scared of what people would say'. Her first camming experience, however, was 'nothing like that'. She said it was less 'creepy and sexual than I thought it would be', and she didn't have to do anything she was uncomfortable with. Her insecurities and 'flaws', it turned out, 'are someone else's kink'.

When she first started streaming she made \$700 in the first month with a 'new model' tag on Chaturbate. Since then, many viewers have dropped off and she's now making an average of \$400 a month. She's not an aspirational streamer like some others, and doesn't think she'll be streaming for too long; it's become her

primary source of income while off work due to coronavirus but she hopes to be back at work full time eventually.

Roxy uses several platforms to facilitate her streaming, including: Chaturbate, Snapchat, Twitter and Only Fans. She also uses Amazon Wishlist. Like Faye, she recognises she has to be strategic about what she streams and posts of each platform. For example, she'll post half naked photos on Snapchat, 'maybe not as often as I should, maybe two or three time per week'. But she never goes fully nude on Snapchat – she saves that for Only Fans. Snapchat is more for 'off cam' stuff. She'll be available to chat to her fans anytime – and not just about sexual stuff. 'Most of the other guys just want someone to talk to, they're a little lonely.' Roxy acknowledges that this form of connection is a big component of her work. It's not strictly sexual – she says 'it's more than me [being] just a naked cam girl and them someone that watches me'.

Only Fans is where there's more of an opportunity for her to make money. People pay a monthly subscription of \$12.99, also getting her Snapchat free as a promotion. However, she's only got a handful of subscribers at the moment, so it's not yet lucrative for her. The majority of her content is pictures, but she is starting to branch out into video as well. Like with Snapchat, Roxy feels obliged to reply to all the messages on Only Fans – but says the messages are less frequent. Many of the messages she gets across the two platforms are not sexual. They are instead from people who just want some form of company and connection.

Roxy's Chaturbate account typically gets around 100 viewers per stream, with a few people frequently involved in the chat feed. Most of the time she is just chatting and trying to get people to interact in that way. There's no single product Roxy offers, besides herself. She might be doing some arts and crafts and chatting one day, and be doing a 'shower show' the next. The appeal isn't a single product, as Roxy says, the appeal is that it is live – 'it's more real, more engaging'. 'It's not all about sex and masturbation', people 'just like to feel acknowledged'.

This is something that has cropped up across the people we spoke to. It's often people's loneliness that drives them to seek the company of streamers; to seek the connection they're missing in their lives.

There is, of course, a sexual element to Roxy's work. The amount of tips she receives depends on how much of her body she shows, and what she does with it. Once there are enough people in the chat room, people will start to tip, and once 'this gets going I'll start flashing or shaking my butt' – 'people realise they won't be getting anything for free'. She also describes the 'price differentials' related to the body parts she shows. 'I have a higher price for flashing my vagina'. So this is where Roxy makes her money, but not necessarily where she finds most of her enjoyment – 'what does cost more I'm less comfortable doing often'. Most of her fulfilment in her work stems from her regulars, who she refers to as her 'little buddies' – 'I actually enjoy talking to them'. The way she describes them – 'I like to chat and talk to them, I do have fun, some of them are actually funny' – is demonstrably affectionate. It's clear Roxy sees some of them as friends.

One of Roxy's biggest concerns is being found online by people she knows. Interestingly, she says it is a very private thing for her – something which may seem at odds with what she does – and that only a couple of her friends know about it. Being a sex worker, she says, 'is stigmatised...people look down on it' – and she doesn't want people from her other work knowing what she does on the side.



NICK, BINGO HOST (MULTIPLE BINGO SITES)

Nick has been at his current workplace as a bingo host for about a year. He'd heard from people he knew that worked there already that it was a friendly environment and decided it would be a good source of income with a baby on the way.

He says he 'adore[s] working there', saying that everyone is 'amazing'. Nick really enjoys the community aspect of the job, both with his colleagues and customers. The customers are generally really chatty with lots of them having played for years and built up friendship groups on the site. Unlike most of the streamers we spoke to, Nick goes into an office to work. He says the community is great – both within the office and within the chat world – any time he's in a bad mood, he'll 'always be lifted' after a shift.

Nick is a host on multiple bingo platforms and has different fake names for each, although many regulars have connected the dots and are aware of his various profiles. He makes sure he's really upbeat and interested in what his customers have to say. Some of them are very extraverted and chatty with each other as some have known each other for years. Though he also talks to a lot of people who live alone, and are there to make human contact. His persona doesn't just shift with who he's talking to, though. It also shifts depending on the platform on which he is moderating. For example, on one platform he feels as though he can 'be a bit more cheeky with them and have a laugh,' whereas on another 'you might not have as much banter, you'll just be talking about every day things'.

Over his time working in this sphere, Nick has honed his moderating skills. He talks about the crucial ability to be able to 'gauge the room and who you're talking to, knowing that you're there to care for the players'. He emphasises the need to have empathy and to make things 'colourful and fun'. The key to getting people to be positive, even if they're not winning, is to ask questions and get into what people like to talk about – anything from food to music; hobbies to pets.

So, the emphasis for Nick is not on making money or making players part with theirs. He says he has a duty of care to make sure people are gambling responsibly – ‘as chat hosts we’re very hot on caring for the players’. The relationship is not transactional. It is caring and supportive. It is also reciprocal. Many of his players know him well, know his sons name and ask how he is or send him hugs. Equally, he knows lots of them by name, asks about their holidays and about their families – there’s often a tangible sense of community in the chat rooms.

Nick is enthusiastic about his future in the industry, too. He says there is ‘so much room for progression it’s unreal’. He can see his path meandering amongst the different options, like being a buddy to help other new people, or becoming a senior or a manager – ‘there are plenty of opportunities for people to better themselves’.



ELLEN, BINGO HOST (MULTIPLE BINGO SITES)

Ellen has been a bingo host for 8 years. She did fashion photography at university and needed a job. After a friend recommended she go for a job as a chat host, she applied and got the role. Her fashion photography background has meant she has been able to get more involved in the promotion side of things. Ellen likes the fact that ‘we can always get involved in other departments’ – saying ‘the more you put in the more you get out’.

She really enjoys her job and says it often doesn’t even feel like work, it’s more like chatting with friends all day. Every day is different and you cannot predict

how it's going to go – some days may be more challenging, some may just be 'flowing conversations'. Like Nick, she changes her persona depending on the platform she's on. Ellen agreed that one platform allowed moderators to be more cheeky, whereas others are a little different, and this just something you have to 'spot' and 'adjust to'.

Lots of the players do view her as a friend, and she considers empathy as a key tenet for a host. 'Sometimes people have had a bad time, being able to talk to them and be a good listener' is fundamental. In the same vein, tone is key. 'The same sentence on screen could be read different by text so you need to be careful'. One way Ellen deals with this is by using a lot of emojis, something that Nick did, too. The use of emojis can help to manage the tone better.

Ellen finds responsible gambling duties the most challenging aspect of the job. If she suspects someone is struggling, she has a responsibility to move them into a one on one chat and check they are okay which can lead to some difficult conversations. She says she didn't expect these kinds of difficult conversations when she first started – even saying she was a little 'naïve' – 'it's Bingo, you associate it with seaside holidays'.

The same sense of community described by Nick was echoed by Ellen. People 'do see it like a friendship', but the more accurate description would be a 'community'. However this community, at least in Ellen's case, is restricted to the chat rooms. Hosts aren't allowed to add anyone as a 'friend' on Facebook, for example – despite some players trying to do so. There are meet and greet events that Ellen is aware of, but she's never been to one herself.

The future for Ellen is open. As she said, there are plenty of opportunities to work within different departments. For instance, she has more recently been helping out with the writing of terms and conditions and scheduling promotions. This makes her think that copywriting could be an option, as she's enjoying that side of things.



APPENDIX:

PLATFORM CASE STUDIES



LIVE STREAMING SITES

There are a number of live streaming platforms available allowing users to view and stream a range of content from gaming to general chat. Dedicated streaming platforms include Twitch, Periscope (integrated into Twitter), YouTube Live, and Mixer. Most social media platforms also include live streaming features such as Facebook and Instagram – making live streaming readily accessible to anyone with a smartphone.



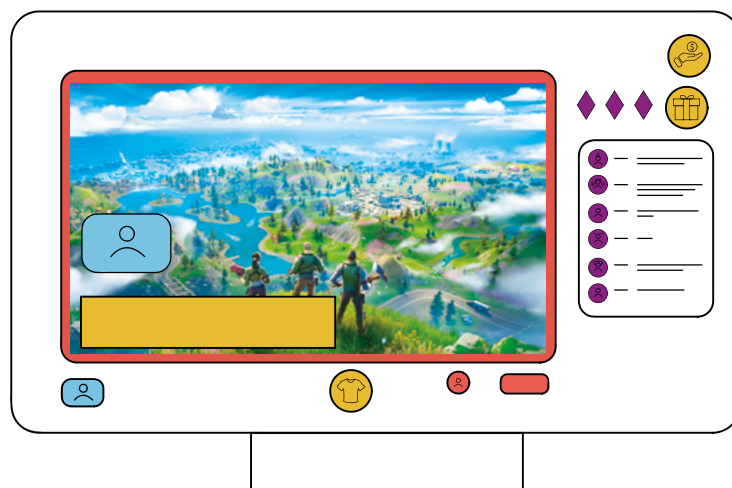
TWITCH

WHAT IS TWITCH?

Twitch is a live-video streaming service, bought by Amazon in 2014. Originally created for gaming streams, it has expanded to include a whole range of content, including music, hobbies and 'just chatting' streams.

It's the most popular live streaming service in the world, accounting for 70 percent of all livestream hours watched, and 2.72 billion hours in 2019¹. Recently, competitors like Mixer, owned by Microsoft, are beginning to attract the big-name streamers², although Twitch still dominates the market.

Twitch has made live streaming mainstream – making it easier to upload content and earn money and has led to the high number of full-time and 'celebrity' streamers there are today.



1 <https://gritdaily.com/twitch-becomes-most-popular-live-streaming-site-beating-out-youtube/>
2 <https://www.businessinsider.com/amazon-twitch-vs-mixer-youtube-stars-who-switched-2019-11?r=US&IR=T>



SOCIAL INTERACTION

During live streams, viewers can post messages in the chat feed next to the video. Viewers use the chat feed to talk to each other and the streamer, asking questions or making suggestions.

The type of chat varies by stream type. A lot of gaming streams are more focussed on the gameplay, with comments reflecting viewers opinions about what has just happened in the game. 'Just chatting', hobby and more light-hearted gaming streams are often far more social, with viewers and the streamer sharing information about themselves and asking/answering general life questions.

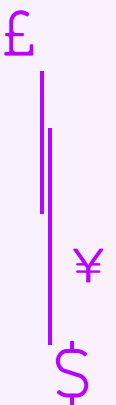
Some viewers are regular commenters on certain streams, and if they subscribe, this is indicated by badges next to their name. Often streamers will work harder to engage with those viewers, rewarding them for their subscription with more direct attention.



MONETISATION

While Twitch is free to access, there are a number of ways in which the site and streamers can earn money from viewers. Streamers have to be part of the affiliate programme to be able to earn money and they have to have subscribers to their channel. Streamers need to meet certain criteria, including streaming hours and follower numbers before they can become eligible for affiliate or partner status.

Affiliates can rise to partner level once they begin to receive huge numbers of views, this allows them to begin earning advertising revenue along with a number of other perks for the streamer.





Subscriptions

As mentioned above, viewers can subscribe to streams which can result in them getting more attention from the streamer, as this gives them a badge next to their name. Benefits of subscribing can include custom emotes (emojis); access to subscriber-only mode and chats; subscription only streams; badges, and ad-free viewing.

Subscriptions are tiered, and they go up in price. On some channels, benefits increase by tier, however, some tiers provide no benefits other than providing “extra support for your streamer”. You will, however, get a different badge to indicate your tier, and probably extra attention, too.

Bits

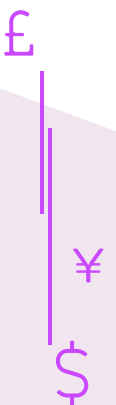
Twitch members can purchase tokens called ‘Bits’ which allow them to tip streamers. Streamers often have tip goals and encourage viewers to tip.

Bits can be used to create a ‘cheer’, which is a special ‘bit emote’ that can be bought and posted into the chat stream, sending tips to the streamer. Cheers can be used to congratulate streamers, for example, if they win a game. But they can also be used to generally show support. The amount of times viewers cheer earns them ‘cheer chat badges’ for that particular stream. Streamers can set the minimum number of bits required for a cheer. Often streamers will acknowledge and thank the tipper.

Donations

Streamers can also set up the option for viewers to donate. This is often done through PayPal and sends money directly to the streamer rather than using Twitch’s bits system. Streamers can share the link to their donation page using the comments section or by creating a donation link section on their channel page.

To acknowledge donations, streamers can add a donation leader board to their channel page, or verbally thank them during the stream.





Merchandise

Streamers are able to add links to their profiles for merchandise. Some streamers partner with brands to sell merch on their sites.

Adverts

Partner and affiliate level streamers are able to run ads throughout their streams to generate additional revenue. The placement and length of the ad are up to the streamer. The income earned from ad breaks depends on how many viewers see the ad.

Brand sponsorship

Companies regularly take advantage of loyal and large streamer audiences through sponsorships. This can range from product placement/endorsement, advertisements or links in bios.

Stream gifts

A gifting service that allows viewers to send streamers gifts while keeping their personal information private.



CAM SITES

The camming industry is well established and has been around for many years. Sites like Chaturbate and LiveJasmine are extremely popular and the increasing accessibility of streaming technology is allowing more and more people to enter the cam model industry and earn money.

Cam models are also using platforms like Snapchat and Instagram to manage their fans or privately stream content to groups of paid subscribers. Often cam models will provide content on a range of sites, taking advantage of their varying features and audiences.

Live streams provide a different service to pre-recorded porn, as viewers are able to interact with the model and other viewers, making the experience seem more 'real'. People often watch live streams not just for sexual gratification but also to interact and chat with the performer or even just as background noise while doing something else.



CHATURBATE

WHAT IS CHATURBATE?

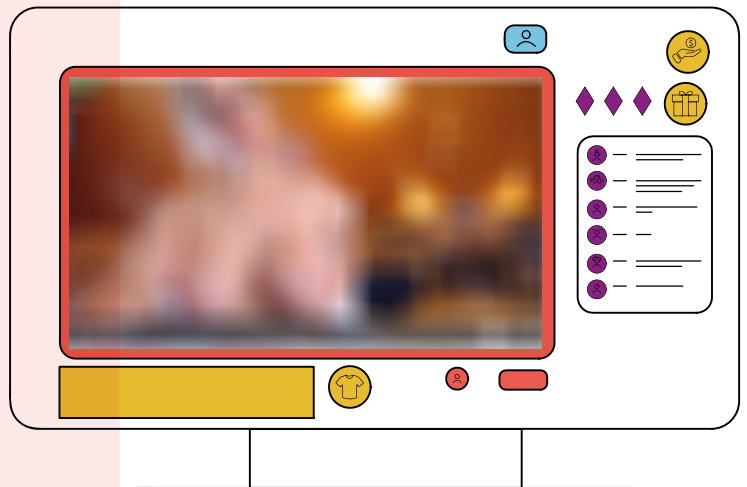
Chaturbate provides live webcam performances from cam models. Streams typically include nudity or sexual activity, but not always. Cam models are a range of genders and ages and performers are either solo, or with other people.

Chaturbate began in 2011 and now receives around 2.5 million unique users each day. As the name suggests, conversation and sexual gratification take equal footing in the offer of the site. Chaturbate is the third most popular camming website behind LiveJasmine and Bongacams.

The most successful models on Chaturbate are watched by thousands of viewers at any one time and earn hundreds of tokens an hour.

HOW IT WORKS

Cam streams involve a live feed from the model on the left with a live chat feed on the right. The page also includes information about the model, links to their other sites and paid for content such as photos or private videos.





SOCIAL INTERACTION

Viewers can chat to each other and the model using the chat feed, Models often respond verbally to comments or type their replies. The amount of chat varies from stream to stream, some are extremely chat focussed with conversation topics ranging from the sexual to the banal.

Interaction levels between viewers themselves also vary, some clearly recognise each other and chat amongst themselves while on other feeds viewers largely ignore each other and only interact with the cam model.

Regular viewers are able to build a relationship with the cam models, with performers often acknowledging regulars when they appear on the comment feed. Some fans will even defend their favourite cam models from any criticisms, acting almost like unofficial moderators.



MONETISATION

Visitors to the site are able to watch for free, however, there are a number of ways viewers are encouraged to spend money.

Tipping

Viewers can tip performers with tokens while the stream is live, this is often to elicit an action from the performer. E.g. a change in their vibrator setting, or a change of position.

Tipping notices automatically appear on the chat streams at regular intervals, encouraging viewers to send tips.





When a viewer tips, it is flagged by an automatic message in the chat feed, including their username and the tip amount. Tippers sometimes get positive feedback for tipping either from the cam model or other viewers.

Chaturbate takes a percentage fee when the customer initially buys a set of tokens. One token is worth around \$0.05 to the model.

Paid for content

Chaturbate profile pages often include additional photos and videos which can be unlocked with token payments or by becoming a fan club member.

Subscriptions

Fans can join 'fan clubs' for their favourite performers. This is a paid for subscription at a price per month set by the cam model. Fan clubs provide access to the above additional content like exclusive photos and videos. This also turns their username green in the chat so other people and the cam model can see they are a fan club member.

Links to subscription sites

Cam models are able to post links to platforms like Snapchat where they will charge for access to additional content.

Wish lists

Cam models can even include Amazon Wish Lists on their accounts so fans can purchase items for them.



ONLINE BINGO CHAT

The gambling industry uses livestreams in a range of ways, from live play to sports betting. Bingo sites utilise live gameplay and chat to mimic the shared experience of a Bingo hall. Users can play the game while using a chat bar to talk to other players and moderators.



JACKPOT JOY

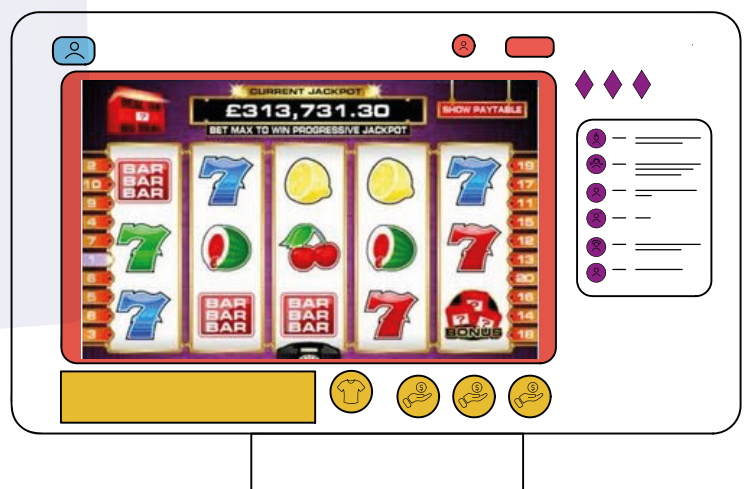
WHAT IS JACKPOTJOY?

Jackpotjoy is an online bingo and slots gambling website. Players can play a range of games by depositing money into their online account. During each game there is a live chat feed visible to allow interaction with other people playing. The gameplay experience is often pseudo-shared, players are not often competing with anyone else and members of the chat can even be playing a different game entirely.

The chat feeds are moderated by a host who rotates hourly. Their role is to keep the conversation going, keep the tone upbeat and make sure nothing inappropriate is said on the chat.

HOW IT WORKS

Once a player enters a game a chat feed automatically appears down one side.





SOCIAL INTERACTION

Gameplay often seems like a secondary activity – play is automatic, numbers are crossed off by the computer during bingo. The social aspect plays a key role, with the chat being far more interactive than the game itself.

Some conversation covers the gameplay, sharing win amounts, for example. However the vast majority of chat is light-touch personal – discussing what's for tea, who has been on holiday and how everyone's day has been.

Players build relationships with each other, carrying on chats over multiple games. Players can choose to switch chat rooms and aren't all necessarily on the same game, although most remain with the default chat for the game they are playing.

The moderator also plays an important role in social interaction. Although they use fake names and regularly rotate, players often recognise the host and similarly chat with them as they would another player. As the host has to keep things upbeat and flowing, they are a dominant force in the chat, ensuring the social interaction continues.



MONETISATION

A game has to be played to access the chat stream, so to be involved in socialisation players need to be betting money, this can be small amounts per game, just a few pence.

Moderators will keep everyone's spirits up, encouraging play and every so often announce chat competitions for cash or physical prizes.



PELOTON, AND SIMILAR SPORTS APPS

Websites and apps have provided the perfect platforms for people to access sports and fitness content and for professionals to get their workouts in front of fans and customers. Live streaming has taken this further, with gyms and personal trainers taking their offer live. Many people are streaming workouts live over existing platforms – Joe Wick’s lockdown PE lessons are perhaps the biggest mass participation workout live streaming event that has ever happened. Peloton have gone one step further by developing a bespoke platform for live streaming exercise classes and building in a host of other features to enhance feelings of connectedness.



PELOTON

WHAT IS PELOTON?

Peloton describes itself as an “immersive workout experience”. They stream a range of fitness classes live, which people access from their home, logging into the Peloton app to view along with other Peloton members. Built initially around an indoor cycling offer, they now have a range of classes covering different types of exercise.

The central feature of the Peloton offer is a bespoke indoor stationary bicycle, designed specifically with Peloton workouts and the app in mind. Not only does the bike log your activity, it shares it with Peloton and some information goes directly to the instructor in real time.

HOW IT WORKS

During a session viewers can watch a live video feed of the instructor, see their own stats and view a sidebar that shows who else is working out at the same time.

You can connect with others through simple interactions like virtual high fives but there’s no chat function.

The instructor can see information about each viewer and how they are performing and will use this to engage with them.

Viewers can also help curate the playlist and make song recommendations.





SOCIAL INTERACTION

Unlike some of the other platforms here, direct social interaction with other users is less of a feature in Peloton – viewers are too busy to type messages to each other or directly to the instructor, and we understand the use of one-to-one video chats with friends during workouts is limited. However, the feeling of connectedness is absolutely crucial to Peloton’s model. They are explicitly selling live workouts where you are a member of a class, but simultaneously it can feel very personal if you want it to. In this way, Peloton and Peloton instructors foster the same feeling of a personal-but-shared experience as video game streamers or cam models do.

As with other types of live streaming, personality plays a central role for Peloton too. The instructors are a hugely important part of Peloton’s appeal and attract their own following among Peloton users, with people often having favourite instructors and choosing to primarily follow specific instructors. A cursory glance at social media and online forums tells you that Peloton instructors have large social media followings and a lot of dedicated fans. That adds an important element to the instructor-rider interactions, adding significant value to a shout out or mention by an instructor.

Interaction in Peloton is lead largely by the instructor. They use the data they have on participants to personalise the experience as much as possible, primarily through shout outs to members of the class for various reasons. For example:

- A birthday (the instructor has a list of participant’s DoBs)
- A ride anniversary (e.g. 100th session)
- Someone’s position on the class leader board (based on power output)
- You have a funny username
- You recommended a song the instructor features in the workout playlist
- You’re a regular rider whose username the instructor recognises

These small interactions, the live participation, and shared appreciation for the instructors themselves help people to feel like part of a wider community.

There is an option for one-to-one or group video calls with other Peloton riders who are in your class, but these have to be existing 'friends'.



MONETISATION

At the time of writing, the most basic form of Peloton membership is digital membership via the app at £12.99 per month. This gives access to a range of live classes that don't require any specific equipment. Although, without the Peloton bike, there is no data being fed to the instructor while you ride so your interaction is more limited (at least in cycling workouts). All-access membership requires the purchase of their exercise bike which starts at £1,990, membership fees also increase in order to pair the bike and the app, going up to £39 per month.

Unlike other live streaming platforms, Peloton doesn't enable the streamers (in this case the instructors) to be paid directly by the viewer. Instructors are employees of Peloton, not self-employed people using a third-party platform. That being said, the role of the instructors is to attract and retain Peloton users, so it's fair to assume they are well remunerated, and this may well relate to their ability to maintain and grow Peloton.

CHURCH

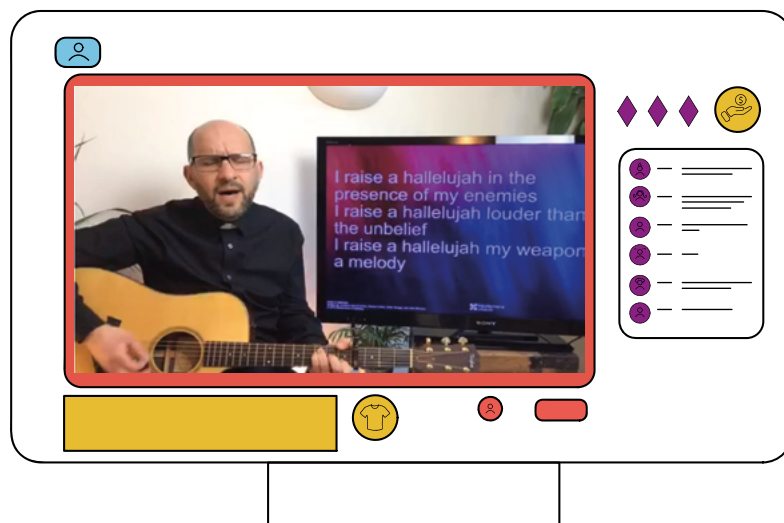
With such a huge global audience and a focus on specific moments of shared worship it isn't a surprise that religion is fertile ground for the growth of live streaming – much in the same way as any other live event that brings people together. For this case study we have looked largely into live streaming of Christian church services and other activities, and largely in the United States, but this is not a phenomenon limited to any one particular religion or sect, and examples can be found across the world.

CHURCH

WHAT IS A CHURCH LIVE STREAM?

Live streamed religious services work in the same way any televised service might. Larger places of worship may well have access to high-quality audio-visual equipment to record and stream services, and the idea is by no means a new one—services have been televised for a long time, and the advent of live streaming provided an important way for churches to cater to both a local audience who couldn't attend in person, and a wider audience beyond outside their locale.

As well as using the live streaming functions of platforms like Facebook and YouTube, there are also dedicated live streaming sites and solutions designed and marketed specifically at churches, selling a bespoke, high quality audio-visual experience that churches otherwise may not be able to get using sites like Twitch.





SOCIAL INTERACTION

Importantly, some of these live streaming solutions also include functions for audience participation and interaction – whether this is a live text chat function for viewers to comment and chat with each other during a service’s live stream, or more direct interaction such as interactive prayer sessions where the audience engage directly with whoever is leading the prayer service.

These interactive, more intimate, sessions are closer to the style of live streaming seen on platforms like Twitch, compared to live streamed church services where viewers are more likely to be passive viewers than active participants.



MONETISATION

The most obvious approach to monetisation for churches is to enable and encourage online donations. Live streaming provides additional opportunities to do this, with some services enabling targeted donation messages to be displayed at key points within a live stream.





REVEALING REALITY