

YOUTUBE INSIGHTS

QUARTERLY INSIGHTS FOR BRANDS FROM GOOGLE AND YOUTUBE
UK, MARCH 2015



DOWNTIME HAS HAD AN UPGRADE

**MORE MOBILE MOMENTS,
MORE OPPORTUNITIES TO CONNECT**



The way we spend our downtime has changed. Whether waiting in line at the supermarket, on the bus, or even in the bathroom, consumers are filling moments that were previously unoccupied, with mobile.

**WITH ALL THIS NEW TIME SPENT ON MOBILE,
THERE ARE MORE OPPORTUNITIES THAN EVER
TO ENGAGE AUDIENCES – BUT WHAT'S THE BEST
WAY TO REACH THEM?**

One of the most popular activities for your consumers to indulge in is watching mobile video, and YouTube is one of the most popular platforms in the world to watch it on. The future of online video is in their hands – use YouTube to make a big impact on the small screen.

AUDIENCE

Find out how mobile video offers opportunities to connect with a highly engaged audience

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PART 1

AUDIENCE

Find out how mobile video offers opportunities
to connect with a highly engaged audience



MORE MOBILE MOMENTS, MORE OPPORTUNITIES TO REACH YOUR AUDIENCE

In today's connected world, audiences have taken full control of their own programming, and they can choose from a wider range of channels and content than ever before.

The growth of online video means viewers can watch the content they want, when they want – and thanks to mobile, exactly where they want. YouTube can help you reach them.

MOBILE VIDEO IS GROWING FAST



COMPARED TO LAST YEAR, THERE'S

81%

MORE MOBILE DATA TRAFFIC WORLDWIDE
— WITH VIDEO BEING A BIG DRIVER

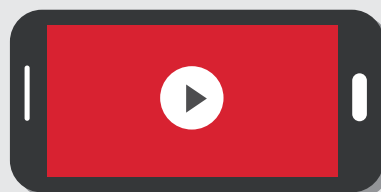
Source: KPCB: Internet Trends 2014 – Code Conference, May 2014

AND IN THE FUTURE?

69%

OF THE WORLD'S MOBILE TRAFFIC
WILL BE VIDEO BY 2018

Source: Cisco VNI Global Mobile Data Traffic Forecast 2014



AUDIENCES USE MOBILE VIDEO TO ACCESS THE CONTENT THEY WANT, WHEN THEY NEED IT

WHEN THINKING ABOUT YOUR VIDEO STRATEGY, UNDERSTAND WHY AUDIENCES WATCH MOBILE VIDEO



52%

TO BE ENTERTAINED
OR INSPIRED



22%

TO LEARN
SOMETHING NEW



17%

TO KEEP UP
WITH TRENDS



36%

TO ESCAPE
OR RELAX

Source for all: Consumer Barometer. Base: Internet users | Watched online video in the past week |
Answering based on the most recent online video session in the past week.

AND THEY'RE NOT JUST WATCHING
AT HOME, WORK AND SCHOOL

25%

ARE ENJOYING VIDEO ON THEIR MORNING
COMMUTES, THEIR EVENINGS OUT,
AND ALMOST EVERYTHING IN BETWEEN

Source: Consumer Barometer. Base: Internet users | Watched online video in the past week



all stats for Europe

FIND A MORE ENGAGED AUDIENCE ON MOBILE VIDEO



**ARE 2X AS LIKELY TO BE FOCUSED WHILE
WATCHING VIDEOS ON THEIR SMARTPHONES
THAN CONTENT ON TV**

Source: 18-34 Year-Old Video Consumption
Diaries, IPSOS-Google, US, Apr 2014



**OF EUROPEAN AUDIENCES WATCHING
MOBILE VIDEOS GAVE THEM ALL,
OR MOST, OF THEIR ATTENTION**

Source: Consumer Barometer. Base: Internet users | Watched online video in the past
week | Answering based on the most recent online video session in the past week



**OF VIDEOS WATCHED ON
SMARTPHONES IN EUROPE WERE
UP TO 5 MINUTES LONG...**



**WERE 5 MINUTES
OR LONGER**

Source: Consumer Barometer. Base: Internet users | Watched online video in the past
week | Answering based on the most recent online video session in the past week

YOUTUBE ATTRACTS A MASSIVE ONLINE VIDEO AUDIENCE, ACROSS MULTIPLE SCREENS



**PEOPLE IN THE UK WATCH VIDEOS
ON YOUTUBE EACH MONTH**

Source: comScore MMX, UK, January 2015



**OF THE UK'S WEB POPULATION SPEND
NEARLY SEVEN HOURS WATCHING
YOUTUBE VIDEOS EVERY MONTH**

Source: comScore MMX, UK, November 2014



**OF ALL YOUTUBE VIEWS NOW
COME FROM MOBILE DEVICES**

Source: YouTube Internal Data, Global

YOUTUBE AUDIENCES ARE ALWAYS CONNECTED



**"MY SMARTPHONE IS AN
EXTENSION OF ME"**

Source: YouTube Audience Report UK, Aug 2014



**"THE FIRST THING I DO WHEN
I WAKE UP IS CHECK MY
SMARTPHONE/TABLET"**

Source: YouTube Audience Report UK, Aug 2014



**"I FEEL DISCONNECTED
IF I DON'T HAVE MY
SMARTPHONE/TABLET"**

Source: YouTube Audience Report UK, Aug 2014



**"I AM CONSTANTLY GOING BACK
AND FORTH BETWEEN MY
DIFFERENT DEVICES"**

Source: YouTube Audience Report UK, Aug 2014

AND THEY LOOK FOR DIFFERENT CONTENT AT DIFFERENT MOMENTS. UNDERSTAND THIS MINDSET WHEN THINKING OF YOUR BRAND AND YOUTUBE



**AUDIENCES WATCH
TO BE ENTERTAINED**

ALL
59%
16–34s
65%

Source: YouTube Audience Report UK, Aug 2014



**AUDIENCES WATCH
TO BE INFORMED**

ALL
36%
16–34s
37%

Source: YouTube Audience Report UK, Aug 2014



**AUDIENCES WATCH
TO BE INSPIRED**

ALL
25%
16–34s
34%

Source: YouTube Audience Report UK, Aug 2014

PART 2

CONTENT

Explore how YouTube videos influence
consumer journeys across multiple verticals





AUTO CONTENT

Featuring everything from test drives of the latest cars to crazy motor modifications, YouTube's auto channels are a must-watch for audiences with a need for speed.

REGULAR AUTO CHANNEL VIEWERS

79%

USE YOUTUBE AS THEIR
FIRST CHOICE TO FIND
OUT ABOUT CARS
AND DRIVING

(49% OF OCCASIONAL/NON-USERS
OF AUTO CHANNELS DO THE SAME)

96%

GET IDEAS
FOR PURCHASES
FROM YOUTUBE

(29% ON A DAILY BASIS)

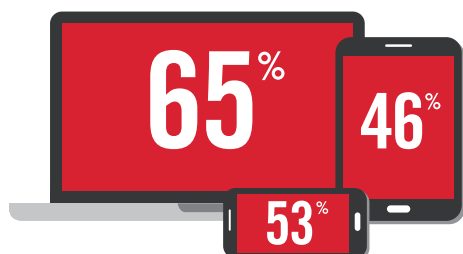
1 in 4

ARE RESEARCHING
OR SHOPPING FOR
PRODUCTS WHILE
WATCHING AUTO
CONTENT ON YOUTUBE

2^x

MORE LIKELY TO ENJOY
YOUTUBE CONTENT
THAN MAGAZINES
ON THE SAME SUBJECT

HOW ARE THEY ACCESSING THEIR FAVOURITE AUTO CHANNELS?



WHERE ARE THEY WATCHING AUTO CHANNELS ON YOUTUBE?



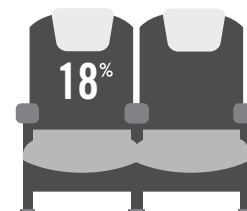
80%

AT HOME



19%

AT WORK



18%

WHILE
TRAVELLING

Source: YouTube Auto channels: User engagement research findings, UK, January 2015

YOUTUBE CHANNEL SPOTLIGHT



/DRIVE

YOUTUBE.COM/DRIVE

SUBSCRIBERS: 1.3M

/DRIVE celebrates the culture of cars, and the channel is dedicated to car reviews, driving adventures, motorsports coverage and detailed features about the manufacturing of high-end cars. Car lovers can go anywhere they'd never normally get the chance to – the races, the factories, and even the studios. Videos cater for any type of auto enthusiast, offering everything from test drives and factory tours to honest racing insight.



MUSIC CONTENT

Whether they prefer watching the biggest pop icons or up-and-coming bedroom stars, official music videos or exclusive sessions, avid music fans consider YouTube's music channels their go-to destination.

REGULAR MUSIC CHANNEL VIEWERS

95%

USE YOUTUBE TO FIND
AND EXPLORE NEW MUSIC

(68% OF OCCASIONAL/NON-USERS ALSO USE
YOUTUBE TO FIND AND EXPLORE NEW MUSIC –
WHICH IS HIGHER THAN ANY OTHER PLATFORM,
INCLUDING RADIO OR TV)

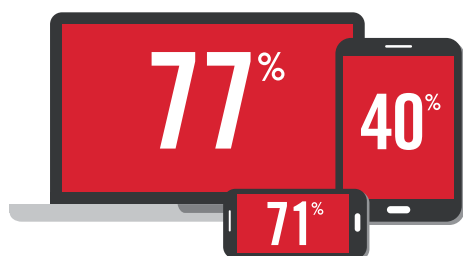
88%

GET IDEAS FROM
YOUTUBE FOR PURCHASE
DECISIONS

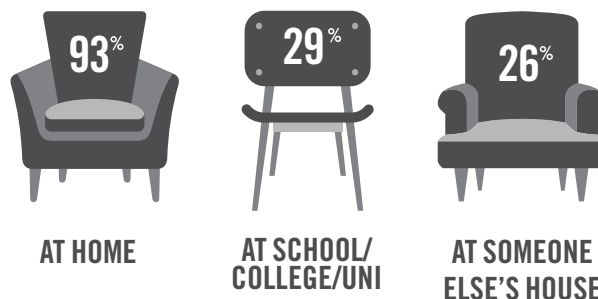
14.5^x

MORE LIKELY TO HAVE
THEIR ATTENTION GRABBED
BY YOUTUBE THAN
BY MUSIC MAGAZINES

HOW ARE THEY ACCESSING THEIR FAVOURITE MUSIC CHANNELS?



WHERE ARE THEY WATCHING MUSIC CHANNELS?



Source: YouTube Music channels: User engagement research findings, UK, January 2015

YOUTUBE CHANNEL SPOTLIGHT



BOILER ROOM

[YOUTUBE.COM/BRTVOFFICIAL](https://www.youtube.com/BRTVOFFICIAL)

SUBSCRIBERS: 642K

Boiler Room is an underground music platform that hosts intimate live music sessions for invite-only audiences all over the world. Named after the first venue they broadcasted from (the boiler room under the founder's office), their initial primary focus was devoted to underground electronic music. Their remit has evolved to support an eclectic range of emerging artists creating music from genres including hip hop, jazz, indie, classical and world music.



PARENTING & FAMILY CONTENT

YouTube's parenting & family channels are a great resource for families everywhere. From tips and tricks for mums and dads to games and cartoons for kids – they're sure to educate, entertain and inspire.

REGULAR PARENTING & FAMILY CHANNEL VIEWERS

68%

USE YOUTUBE AS THEIR NUMBER ONE PLATFORM FOR CONTENT

(32% OF OCCASIONAL/NON-USERS USE YOUTUBE AS THEIR NUMBER ONE PLATFORM FOR CONTENT – WHICH IS HIGHER THAN MAGAZINES OR ONLINE BLOGS)

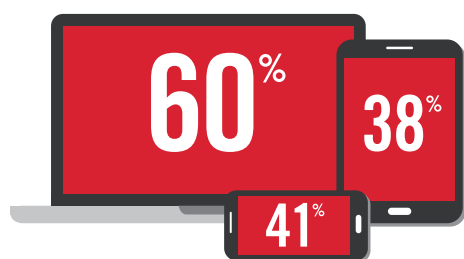
98%

GET IDEAS ON YOUTUBE FOR PURCHASE DECISIONS

2.3^x

MORE LIKELY TO FIND USEFUL CONTENT ON YOUTUBE THAN IN PARENTING MAGAZINES

HOW ARE THEY ACCESSING THEIR FAVOURITE PARENTING & FAMILY CHANNELS?



WHERE ARE THEY WATCHING PARENTING & FAMILY CHANNELS?



Source: YouTube Parenting & Family channels: User engagement research findings, UK, January 2015

YOUTUBE CHANNEL SPOTLIGHT



HANNAH MAGGS

[YOUTUBE.COM/ALITTLEBEAUTYVLOG](https://www.youtube.com/alittlebeautyvlog)

SUBSCRIBERS: 179K

Professional make-up artist, beauty vlogger and new mum, Hannah Maggs has turned her hand to documenting her pregnancy and her experience of parenthood. Every week her lifestyle vlog gives her 177,000 followers an honest, touching glimpse of daily family life.



TECH CONTENT

Offering hands-on gadget reviews and demonstrations, tech news and even exclusive product unboxing videos, YouTube's tech channels are the place to go for the technology obsessed.

REGULAR TECH CHANNEL VIEWERS

86%

USE YOUTUBE AS THEIR NUMBER ONE PLATFORM FOR CONTENT

(45% OF OCCASIONAL/NON-USERS USE YOUTUBE AS THEIR NUMBER ONE PLATFORM FOR CONTENT – WHICH IS HIGHER THAN TV OR NEWS WEBSITES)

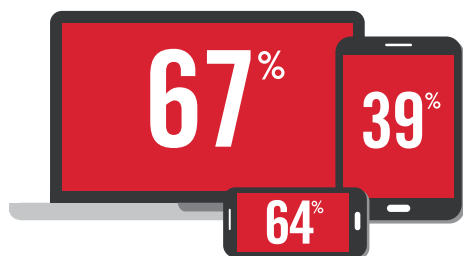
98%

GET IDEAS FROM YOUTUBE FOR PURCHASE DECISIONS

2.7^x

MORE LIKELY TO RELATE TO YOUTUBE CONTENT COMPARED TO TECH MAGAZINES

HOW ARE THEY ACCESSING THEIR FAVOURITE TECH CHANNELS?



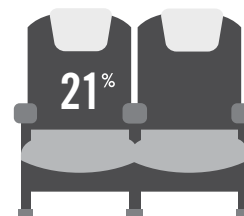
WHERE ARE THEY WATCHING TECH CHANNELS?



AT HOME



AT WORK



WHILE TRAVELLING

Source: YouTube Technology channels: User engagement research findings, UK, January 2015

YOUTUBE CHANNEL SPOTLIGHT



MARQUES BROWNLEE

[YOUTUBE.COM/MARQUESBROWNLEE](https://www.youtube.com/marquesbrownlee)

SUBSCRIBERS: 2.3M

Marques K. Brownlee, known to his fans as MKBHD, runs the most popular YouTube channel for tech reviews on the planet. Trialling and reviewing hardware and software, Marques covers everything from the latest phones, cameras and consoles, through to TVs and even cars.

A man with curly hair and a beard, wearing a light blue button-down shirt, is shown in profile from the chest up. He is in a kitchen, standing at a counter. He is holding a wooden spoon in his right hand, stirring a pot on the stove. His left hand is resting on a tablet computer that is propped up on a wooden easel. The tablet displays a website with a food-related image. In the foreground, there are several stainless steel pots on the stove, one of which contains long, thin pasta. To the right, there is a metal colander filled with green vegetables. The background is a bright, modern kitchen with wooden cabinets and a window with blinds.

PART 3

IMPACT

Learn how partnering with YouTube creators
achieves great results for brands

HOW TEAMING UP WITH YOUTUBE CREATORS AND FILMMAKERS HELPED PEPSI INCREASE ITS MARKET SHARE

Soft drink brand Pepsi Max wanted to grow its market share among 18 to 34-year-olds, and they knew that social media channels were the place to start.

Partnering with YouTube creators, filmmakers and directors, Pepsi created action-packed, original content about unbelievable feats and experiences that was entertaining and easily shareable.

By collaborating with a huge range of people at the top of their game, ranging from free-runners to inventors, Pepsi showcased contributor skills and encouraged collaborations that helped them build a channel that their target audience loved.

APPROACH

- 1. PARTNERED WITH YOUTUBE CREATORS, FILMMAKERS AND DIRECTORS TO CREATE 'UNBELIEVABLE' CONTENT**
- 2. LAUNCHED A YOUTUBE BRAND CHANNEL AS THE CAMPAIGN HUB**
- 3. PROMOTED CONTENT WITH PAID, OWNED AND EARNED MEDIA**

Source: How Pepsi Max's 'Unbelievable' YouTube Channel Helped Increase Market Share, Think with Google, UK, Nov 2014


RESULTS

50M⁺
VIDEO VIEWS

62,000
NEW CHANNEL SUBSCRIBERS



WHY A PARTNERSHIP BETWEEN LV= AND JAMIE OLIVER'S FOOD TUBE WAS A RECIPE FOR BRAND SUCCESS



“Importantly, we saw some of Jamie Oliver’s key brand attributes being transferred to LV=, therefore achieving our top priority of measurements.”

JOANNA WILLIAMS,
DIGITAL MARKETING MANAGER, LV=

LV= is the UK’s largest friendly society, offering insurance, savings, investments and retirement plans, and they wanted to use YouTube to help drive top-of-funnel brand awareness and consideration.

The audience of Jamie Oliver’s Food Tube channel has a very similar make-up to LV=’s target demographic, so they collaborated on a series of kitchen how-to videos, then promoted these as TrueView ads to users aged 35 and over.

LV= helps customers look after things they love, so they asked members of the Food Tube community to nominate little problems they encounter when cooking – and Jamie helped them to solve them. This resulted in a hugely engaged target audience for LV=, which not only drove an increase in brand metrics, but also led to a significant uplift in insurance quotes.

APPROACH

1. PARTNERED WITH JAMIE OLIVER’S FOOD TUBE
2. LAUNCHED A SERIES OF SIX HOW-TO VIDEOS
3. RAN TRUEVIEW ADS TARGETED BY RELEVANT CONTENT AND DEMOGRAPHICS
4. ROADBLOCKED FOOD TUBE AND OTHER JAMIE OLIVER YOUTUBE CHANNELS

RESULTS

94%

INCREASE IN UNAIDED
BRAND AWARENESS

2M⁺

VIDEO VIEWS

Source: Cooking up a Storm: 94% Increase in Brand Awareness for LV= after Jamie Oliver’s Food Tube Partnership, Think with Google, UK, Feb 2015

22,000⁺

INSURANCE QUOTES – OUTPERFORMING
INSURANCE NORMS ON KEY METRICS

MOST POPULAR ADS ON YOUTUBE IN 2014

Check out our top 10 leaderboard showcasing the most creative and captivating ads that audiences chose to watch in 2014. Will your brand be featured here next year?



[Watch now](#)
SAINSBURY'S OFFICIAL CHRISTMAS 2014 AD



[Watch now](#)
JOHN LEWIS CHRISTMAS ADVERT 2014 –
#MONTYTHEPENGUIN



[Watch now](#)
NIKE FOOTBALL: WINNER STAYS



[Watch now](#)
NIKE FOOTBALL: THE LAST GAME
FT. RONALDO, NEYMAR JR., ROONEY, ZLATAN, INIESTA & MORE



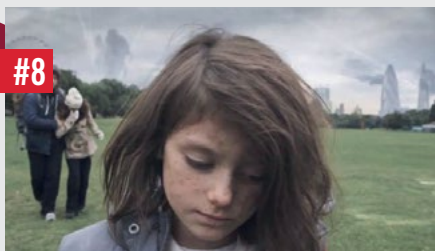
[Watch now](#)
ALWAYS #LIKEAGIRL



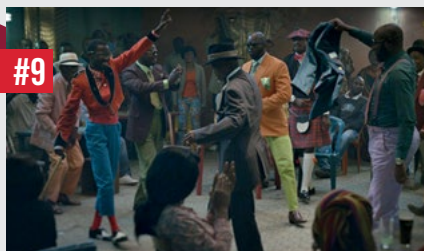
[Watch now](#)
THREE – #SINGITKITTY – CAT ADVERT



[Watch now](#)
MARKS & SPENCER CHRISTMAS ADVERT
2014 #FOLLOWTHEFAIRIES



[Watch now](#)
SAVE THE CHILDREN – SECOND A DAY
#SAVESYRIASCHILDREN



[Watch now](#)
SAPEURS – NEW GUINNESS ADVERT (2014)



[Watch now](#)
PEPSI MAX. UNBELIEVABLE –
HUMAN LOOP THE LOOP

Source: YouTube Ads Leaderboard, Year-End 2014

SOURCES & LINKS

[Cisco VNI Global Mobile Data Traffic Forecast 2014](#)

[Consumer Barometer](#)

comScore MMX, UK, Nov 2014

comScore MMX, UK, Jan 2015

18–34 Year-Old Video Consumption Diaries, US, IPSOS-Google, Apr 2014

KPCB: Internet Trends 2014 – Code Conference, May 2014

YouTube Audience Study, UK, MTM, Aug 2014

YouTube user engagement research findings; Auto channels; Music channels; Parenting & Family channels; Technology channels; UK, MTM, Jan 2015

[YouTube Internal Data](#)

Case Studies:

[How Pepsi Max's 'Unbelievable' YouTube Channel Helped Increase Market Share.](#)

Think with Google, UK, Nov 2014

[Cooking up a Storm: 94% Increase in Brand Awareness for LV= after Jamie Oliver's Food Tube Partnership.](#)

Think with Google, UK, Feb 2015

www.youtube.com/drive

www.youtube.com/brtvofficial

www.youtube.com/alittlebeautyvlog

www.youtube.com/marquesbrownlee

