

ISSUE ONE JULY 2013

YOUTUBE INSIGHTS

QUARTERLY STATS, TRENDS AND INSIGHTS ON VIDEO FROM YOUTUBE AND GOOGLE

INSIDE THIS ISSUE...

AUDIENCE GEN C ON ALL SCREENS



YouTube reaches more **US ADULTS**
AGED 18-34 than any cable network

PARTICIPATION ENGAGE WITH CONTENT



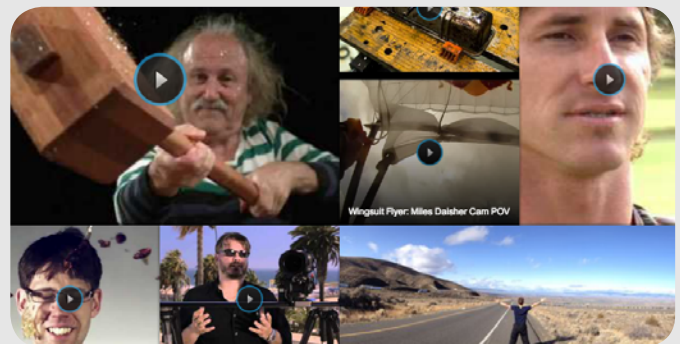
There are now **317 CHANNELS**
with more than **1 million subscribers**

EXPRESSION LEARN FROM THE BEST



DOVE racked up **163 million** global
views for its new campaign

IMPACT MOVE PEOPLE



Find out how YouTube could help you achieve
1-3% sales lift at no additional cost

Audience: Gen C on all screens

A powerful new force in **culture and commerce**, Gen C turns to YouTube for both information and entertainment, using multiple devices to watch videos **whenever** and **wherever** they want



We call them **GEN C** because they thrive on **CONNECTION, COMMUNITY, CREATION** and **CURATION**

CONNECTION

50% talk to friends after watching a video and **38%** share videos on an additional social network after watching them on YouTube.

CREATION

65% have uploaded a video they shot, and **25%** upload videos every week.

COMMUNITY

55% are connected to 100 or more people through social sites, while **15%** are connected to 500 or more.

CURATION

90% say they can't keep content they find online to themselves.

All the above statistics are US-based results and drawn from Gen C YouTube Audience Study (Google / IPSOS / NowWhat)
Additional insights are drawn from Google+ Consumer Insights Lab Generation C Study (Google/Sterling, 2013)



GEN C is a powerful new force in **CULTURE** and **COMMERCE**, influencing

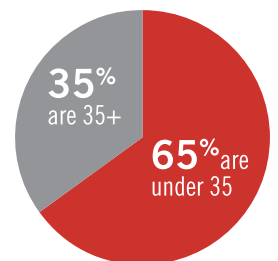
\$ 500 BN
of spend

(Barkley, 2012)



Gen C spans **MULTIPLE GENERATIONS**. **GEN C** is a true **STATE OF MIND**

(Gen C YouTube Audience Study, Google / IPSOS / NowWhat, March 2013)



YOUTUBE PASSED A MAJOR MILESTONE IN MARCH, WITH MORE THAN

1 BILLION

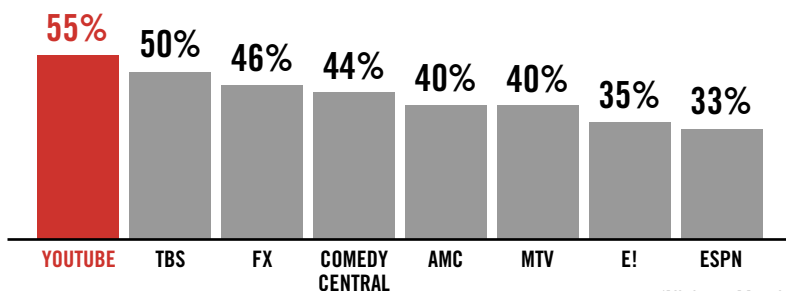
UNIQUE USERS ON THE SITE EACH MONTH GLOBALLY

(YouTube data)

US insights unless otherwise stated

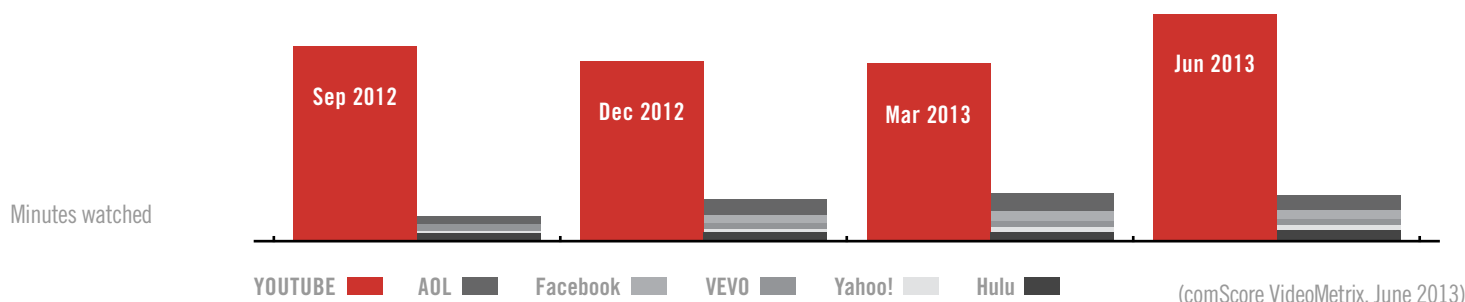
YouTube tops all cable networks in the US in reaching

18-34
YEAR OLDS



(Nielsen, March 2013)

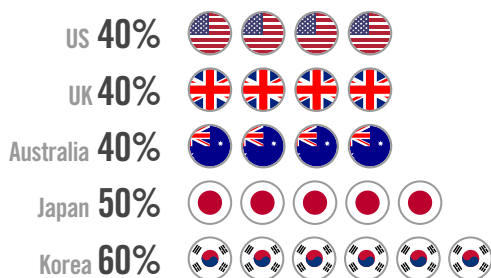
Viewers **spend more time** watching videos on **YouTube** than on the **other top five online video players combined**



(comScore VideoMetrix, June 2013)

VIEWERS ARE WATCHING VIDEOS ON ALL SCREENS, ALL OVER THE WORLD

MOBILE YOUTUBE WATCH TIME BY COUNTRY PER MINUTE



(YouTube data, March 2013)

Globally

25%
1.5 BN HOURS

of YouTube's total watch time is on mobile devices (March 2013)

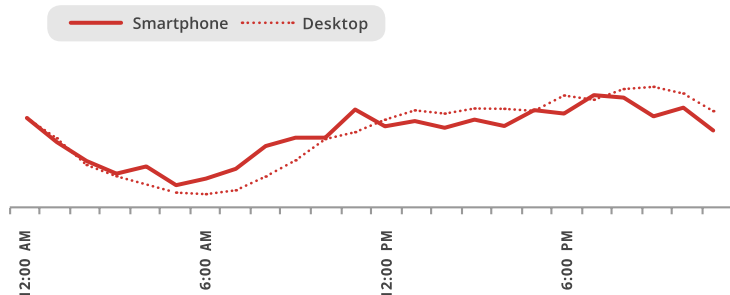
of video are watched on YouTube every month on mobile devices (May 2013)

(YouTube data, March 2013)

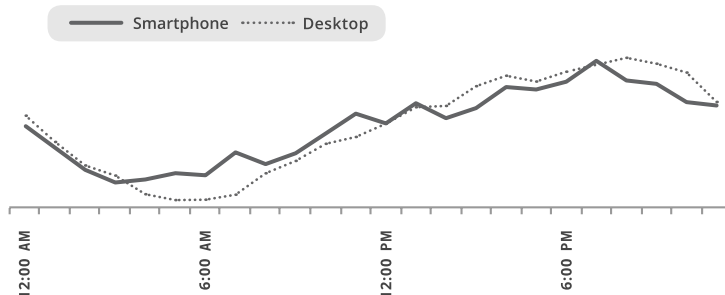
WHEN AND HOW ARE VIDEOS WATCHED?

YOUTUBE USAGE ON SMARTPHONES MIRRORS DESKTOP USAGE, ALMOST 24/7

Weekdays



Weekends



(Nielsen Mobile NetView & NetView panels, December 2012, age 18-34)

US insights unless otherwise stated

Participation: Engage with content

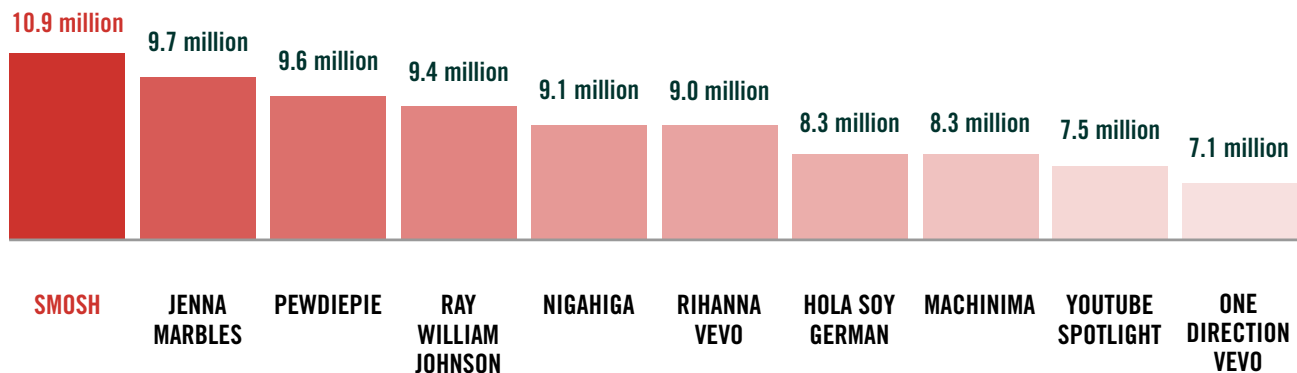
Content on YouTube achieved new heights in the last few months. Several channels passed the one million subscribers mark, brands reached hundreds of millions of customers with authentic videos, and PSY stormed the charts with his latest mega-hit success

170 YOUTUBE CHANNELS PASSED
1 MILLION SUBSCRIBERS
in the first half of 2013

...there are now
317 CHANNELS with more than
1 MILLION SUBSCRIBERS

(YouTube data, June 2013)

TOP YOUTUBE CHANNELS (NUMBER OF SUBSCRIBERS)



(OpenSlate, openslatestudios.com, as of 30 June 2013)

A few highlights from channels with **ONE MILLION+ SUBSCRIBERS** in June 2013. In alphabetical order:

1.24 million
CUTE GIRLS HAIRSTYLES

LIFESTYLE

1.59 million
DAILYGRACE

LIFESTYLE

1.19 million
ESPN

SPORTS

2.79 million
JIMMY KIMMEL LIVE

ENTERTAINMENT

1.23 million
KHAN ACADEMY

EDUCATION

1.62 million
MINUTE-PHYSICS

EDUCATION

2.76 million
VICE

NEWS

1.39 million
WALK OFF THE EARTH

MUSIC

YouTube data unless otherwise stated / US insights unless otherwise stated

From soft drinks to sports to cosmetics to technology, the following represents the most popular brand channels and videos on YouTube

TOP YOUTUBE BRAND CHANNELS (NUMBER OF SUBSCRIBERS)

2.5 million	1.7 million	1.3 million	930,000	680,000	620,000	580,000	550,000	365,000	350,000
RED BULL	GOOGLE	APPLE	GOPRO CAMERA	NIKE FOOTBALL	PEPSI	DCSHOES FILM	GOOGLE CHROME	OLDSPICE	GOOGLE DEV.

(OpenSlate, openslatestudios.com, as of 30 June, 2013)

Does not include any entertainment brands.



YOUTUBE CANNES ADS LEADERBOARD (VIEWS*)

112,898,329	104,523,823	48,950,024	36,972,100	36,252,025	32,866,998	28,564,830	24,126,323	19,991,693	17,728,644
DOVE	TURKISH AIRLINES	EVIAN	ACTIVISION	PEPSI MAX	MICROSOFT	SONY	PEPSI MAX	GOPRO	GOOGLE
REAL BEAUTY SKETCHES	LEGENDS ON BOARD	BABY & ME	"SURPRISE" CALL OF DUTY 4	TEST DRIVE	CHILD OF THE 90S	PLAYSTATION 4	UNCLE DREW	HERO 3	GO GOOGLE

The YouTube Ads Leaderboard is published monthly at <http://www.google.com/think/adsleaderboard>
June's results are available at <http://www.google.com/think/articles/youtube-leaderboard-jun13.html>

*The Cannes Ads Leaderboard was determined by applying the Leaderboard algorithm (factoring in paid views, organic views and audience retention) to the Cannes submission period. These are the top 10 ranked by views as of 20 May, 2013

KEEP UP-TO-DATE WITH WHAT'S HOT AT YOUTUBETRENDS.BLOGSPOT.COM

FEBRUARY



February belonged to the **Harlem Shake** and brands got in on the act, racking up millions of views.

- Pepsi (6.6 million)
- Red Bull (5.9 million)
- Topshop (1.4 million)

MARCH



Goats took over YouTube in March as the most searched-for animal – even beating out those ubiquitous cats and dogs for a period.

APRIL



PSY continued his mega-hit success in April when **Gentleman** reached 100 million views in just four days (currently 400million+ views and counting).

MAY/JUNE



The **YouTube Trends Map** launched in May, showing the most popular videos in major markets across the US.

YouTube data unless otherwise stated / US insights unless otherwise stated

Expression: Learn from the best

*Dove topped the YouTube Ads Leaderboard's Cannes edition, but how did they do it?
And how do other brands make the most of YouTube's potential?*

Understand your audience and provide them with **AUTHENTIC CONTENT** and they won't just watch your advertising – they'll share it.

50% talk to a friend
after watching a video
(Gen C YouTube Audience Study, Google / IPSOS / NowWhat)

70% of Gen C say that content gives them and their
friends things to get together and talk about
(Gen C YouTube Audience Study, Google / IPSOS / NowWhat)

CASE
STUDY

A MOMENTARY LAPSE

INTEL

Creative Agency: Katalyst Media
Media Agency: OMD

INTEL launched a **FIVE-MONTH SERIES** of timelapse photography and slow-motion videography contests on YouTube, encouraging its customers to submit their own photos and videos. With its keen focus on encouraging participation, the campaign saw the **HIGHEST CONVERSION RATE** from ad to response, and the campaign received more than twice the number of expected video submissions.



<http://www.google.com/think/case-studies/intel-momentary-lapse.html>

CASE
STUDY

CAMPAIGN FOR REAL BEAUTY

DOVE (UNILEVER)

Creative Agency: Ogilvy Brazil
Media Agency: PHD

DOVE'S mission is to turn beauty into a source of confidence, not anxiety. Through research, Dove



found out that only 4% of women globally consider themselves beautiful and 54% agree that when it comes to how they look, they are their own worst beauty

critic. In 2013, Dove conducted a compelling social experiment to bring this research to life. To express its message and build brand love it produced a three-minute video, 'Dove Real Beauty Sketches', about how women view themselves. With the support of TrueView, YouTube homepage masthead and search ads, Dove launched its video in 25 languages across 46 Dove YouTube channels, creating one of the most-watched ads ever, with **163 MILLION GLOBAL VIEWS**. Dove encouraged participation and sharing through its YouTube brand channels, Google+ Hangouts and Google+ page, to promote a moving video that not only topped the Cannes YouTube Ads Leaderboard, but also won the Titanium Grand Prix at the Cannes Lions International Festival of Creativity.

<http://www.google.com/think/case-studies/dove-real-beauty-sketches.html>

US insights unless otherwise stated

Impact: Move people

What does all this mean for you? Marketers can achieve **1-3% sales lift** at no additional cost by spending an average of **5% of their media budget** on YouTube, according to media mix models run by MarketShare in partnership with Google

VIDEO GROWTH is not only happening on **YOUTUBE** but across the web on **OTHER PUBLISHING SITES**.

2x more video in-stream ads on publisher sites year-on-year. Top growth publisher verticals are **COMPUTER** and **ELECTRONICS, NEWS** and **SPORTS**

68% of video ads are from **AUTOMOTIVE, RETAIL, TECHNOLOGY** and **CONSUMER PACKAGED GOODS (CPG)** verticals

(DoubleClick, April 2013)

CASE STUDY

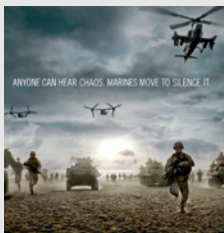
TOWARD THE SOUNDS OF CHAOS US MARINE CORPS

Creative Agency: JWT
Media Agency: Mindshare

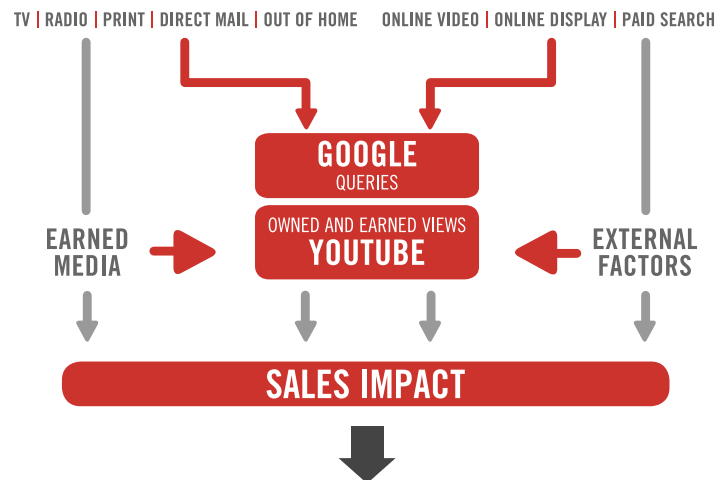
In **MARCH 2012**, the **US MARINE CORPS** launched a major awareness campaign targeted at young men, titled **'TOWARD THE SOUNDS OF CHAOS'**. Partnering with Mindshare and JWT, their goal was to demonstrate the Marine Corps' bravery, commitment and leadership, while reaching their audience in an impactful way.

In just 48 hours, **YOUTUBE** users engaged with the Marine Corps video experience **OVER 128 MILLION TIMES** – a bigger audience than this year's Super Bowl, at a fraction of the cost.

<http://www.google.com/think/case-studies/marines-case-study.html>



THE MEDIA MIX MODEL takes into account the impact of earned and owned media, in addition to paid media in generating sales impact



Across **FOUR VERTICALS**, spending an average of **5% OF MEDIA BUDGET** on **YOUTUBE** helps achieve **1-3% SALES LIFT** at no additional cost

	RECOMMENDED SHARE OF YOUTUBE IN MEDIA MIX		INCREASE IN SALES
CREDIT CARDS	4%	▶	3%
AUTO INSURANCE	3%	▶	2%
HANDSET: OEM	13%	▶	1%
AUTO: MODEL-BRAND	8%	▶	1%

(A media mix model run by MarketShare, in association with Google, from Feb 2009 to Sep 2012)

US insights unless otherwise stated

Useful links

Need to know more? Follow the links below...

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Top Channels

<http://openslatestudios.com>

Smosh

<http://www.youtube.com/user/smosh>

Jenna Marbles

<http://www.youtube.com/user/JennaMarbles>

PewDiePie

<http://www.youtube.com/user/PewDiePie>

Ray William Johnson

<http://www.youtube.com/user/RayWilliamJohnson>

Nigahiga

<http://www.youtube.com/user/nigahiga>

Rihanna VEVO

<http://www.youtube.com/user/RihannaVEVO>

Hola Soy German

<http://www.youtube.com/user/HolaSoyGerman>

Machinima

<http://www.youtube.com/user/machinima>

YouTube Spotlight

<http://www.youtube.com/user/YouTube>

One Direction VEVO

<http://www.youtube.com/user/OneDirectionVEVO>

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YouTube Cannes Ads Leaderboard

<http://www.google.com/think/articles/youtube-leaderboard-cannes13.html>

YouTube Ads Leaderboard - June 2013

<http://www.google.com/think/articles/youtube-leaderboard-jun13.html>

YOUTUBE TRENDS CALENDAR

YouTube Trends Blogspot

<http://youtube-trends.blogspot.com>

YouTube Trends Map

<http://www.youtube.com/trendsmap>

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Dove – *Campaign for Real Beauty*

<http://www.google.com/think/case-studies/dove-real-beauty-sketches.html>

Intel – *A Momentary Lapse*

<http://www.google.com/think/case-studies/intel-momentary-lapse.html>

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US Marine Corps – *Toward the Sounds of Chaos*

<http://www.google.com/think/case-studies/marines-case-study.html>

US insights unless otherwise stated