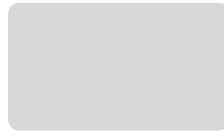
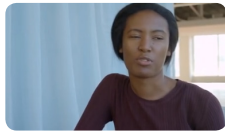


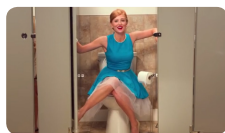
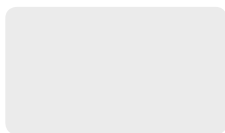
ISSUE THREE | JANUARY 2014

You Tube INSIGHTS

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



DRIVE ENGAGEMENT WITH YOUTUBE TRUEVIEW ADS



YOUTUBE TRUEVIEW ADS ARE
**76% MORE LIKELY TO DRIVE A
RELEVANT SEARCH BEHAVIOR**

YOUTUBE TRUEVIEW ADS ARE
**10x MORE LIKELY TO DRIVE ENGAGEMENT
ON THE ADVERTISER'S YOUTUBE CHANNEL**

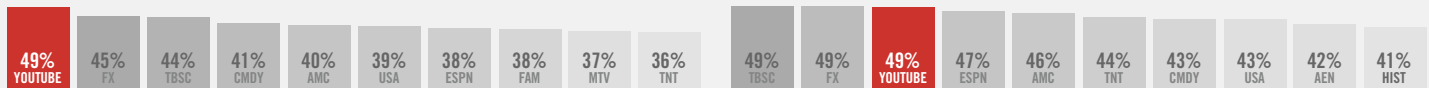
Build your audience with **FANSHIP**

Fans are a brand's most powerful customers; they're active advocates who are also more likely to purchase with greater regularity. Develop meaningful relationships with your customers by aligning your brand with their passions and become part of their lives and communities.

MORE PEOPLE WATCH YOUTUBE THAN WATCH CABLE NETWORKS

YouTube is **#1** in reaching **18- to 34-year-olds** compared with all cable networks

YouTube is **#3** in reaching **25- to 54-year-olds** compared with all cable networks



(U.S. statistics, Nielsen Quarterly Reach vs Top Cable Nets, November 2013)

CONSUMER INSIGHTS

GEN C CONSUMERS ARE BRANDS' BEST FANS

2 IN 3 GEN C CONSUMERS

AGREE THAT: "IF THERE IS A BRAND I LOVE, I TEND TO TELL EVERYONE ABOUT IT"

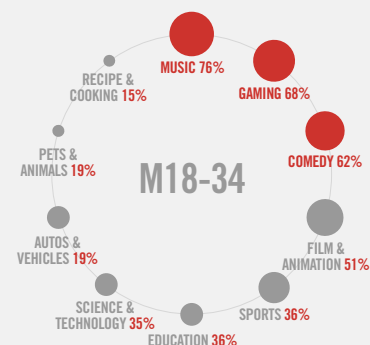
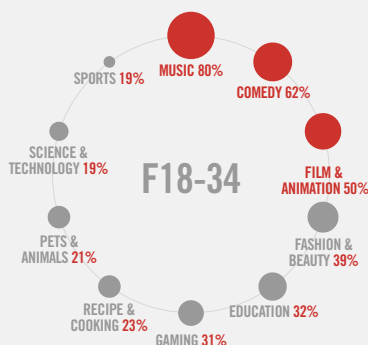
Want to know more? Visit www.google.com/think/collections/the-power-of-gen-c.html

(Global statistics, Ipsos/YouTube Audience Study, December 2013, *Vs. non-Gen C consumers)

BECAUSE NOT ALL 18- TO 34-YEAR-OLDS ENGAGE SIMILARLY ON YOUTUBE, WE LOOKED AT DIFFERENCES BY GENDER

The top three genres most 18- to 34-year-old women engage* with are **music**, **comedy** and **film & animation**

The top three genres most 18- to 34-year-old men engage* with are **music**, **gaming** and **comedy**



Percentage of 18- to 34-year-old women engaging with each topic

Percentage of 18- to 34-year-old men engaging with each topic

*Engagement is defined as any action including comments, likes, favorites, or playlisting a video on YouTube within a certain topic or channel.

(Global statistics, Tubular Labs, December 2013)

ENGAGING WITH COOKING AND FOOD

**COOKING AND FOOD IS THE FASTEST GROWING
GENRE ON YOUTUBE FOR BOTH MEN AND WOMEN**

**370 MILLION
VIEWS**

Generated by **top 20 cooking
and food channels** on YouTube in 2013

2.4x

Increase in subscriptions to the **top 20 cooking
and food channels** on YouTube in 2013

CAKE

The most engaging food for women on YouTube
35% of women engaged with the topic in 2013

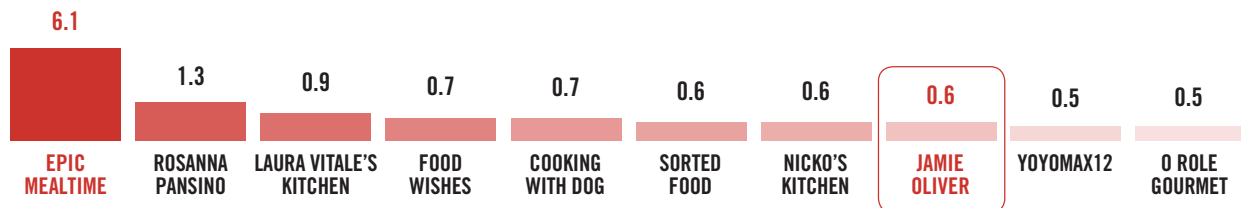
BACON

The most engaging food for men on YouTube
31% of men engaged with the topic in 2013

(Global statistics, Tubular Labs, December 2013)

TOP TEN MOST SUBSCRIBED COOKING AND FOOD CHANNELS

(NUMBER OF GLOBAL SUBSCRIBERS – IN MILLIONS)



(Global statistics, Tubular Labs, December 2013)



**HIGHLIGHTED
YOUTUBE
CHANNEL**

THE JAMIE OLIVER FOOD TUBE CHANNEL

British chef **JAMIE OLIVER'S YOUTUBE CHANNEL** grew its passionate community of food lovers to **600K subscribers** with three key strategies:

1. ENGAGED FANS WITH A BREAKTHROUGH LAUNCH

The Jamie Oliver Food Tube channel built buzz by launching with a 30-minute live show, preceded by a unique interactive video.

2. CURATED REGULAR COMMUNITY CONTENT

The strand "Jamie Presents" showcases the latest cooking talent on his channel and provides regular programming.

3. BUILT PERSONAL CONNECTIONS WITH THE FANS

"What's Jamie Eating Today?" delighted audiences with a peek into his daily life yet required a minimum of his time.

www.google.com/think/case-studies/jamie-oliver-youtube-case-study.html

CONSUMER INSIGHTS

The ways in which consumers use **media across devices** changes by time of day

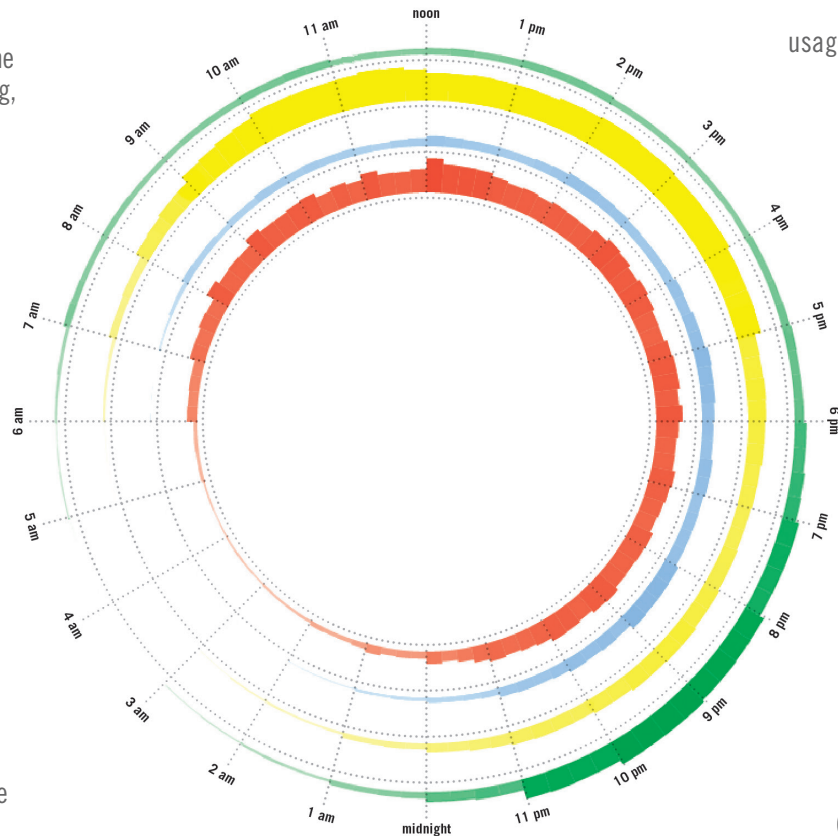
Engagement is steadily high on smartphones and desktops throughout the day, whereas engagement on tablets and connected and cable TVs peaks at primetime hours

SMARTPHONE

Short bursts of activity
Consistent use throughout the day; first thing in the morning, last thing before bed

DESKTOP

Used throughout the day; the usage does not fade in the evening
Evening usage is often in conjunction with TV watching



TABLET

Use peaks in the evening
Tablets are the most versatile device with changing roles throughout the day

CONNECTED AND CABLE TV

Use peaks during primetime evening hours
Cable is a constant throughout the day, often in the background

(U.S. insights, YouTube User Experience Research, Q4 2013)

CONSUMER INSIGHTS

GEN C IS **2x MORE LIKELY*** TO AGREE THAT...
“THE ONLY ADS I LIKE TO WATCH ARE ADS THAT I HAVE A CHOICE TO SKIP”

*(Global statistics, Ipsos/YouTube Audience Study, December 2013, *Vs. non-Gen C consumers)*

Harness the power of **PARTICIPATION**

Gone are the days when brands broadcast messages and audiences watched passively. Today brands are in constant conversation with their fans, following their passions and making relevant, meaningful and fun contributions to popular culture. Just look at the brand response to Harlem Shake.

THE TOP TEN VIDEO ADS OF 2013 GENERATED AN AVERAGE **THREE EXTRA VIEWS ON YOUTUBE BRAND CHANNELS FOR EVERY PAID VIEW**

TOP FIVE ADS FROM THE 2013 YEAR-END YOUTUBE ADS LEADERBOARD

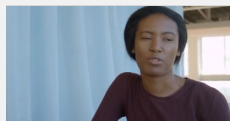
www.google.com/think/collections/youtube-leaderboard.html

EVIAN



BABY & ME
66 MILLION VIEWS

DOVE



REAL BEAUTY SKETCHES
60 MILLION VIEWS

INTERNET EXPLORER



CHILD OF THE 90S
48 MILLION VIEWS

PEPSI MAX



TEST DRIVE
40 MILLION VIEWS

POOPOURI



GIRLS DON'T POOP
20 MILLION VIEWS

(Global statistics, YouTube, December 2013)

WHAT'S THE SECRET TO MAKING A TOP AD?

THE TOP FIVE ADS WERE ALL **MADE FOR YOUTUBE. THEY WEREN'T SIMPLY REPURPOSED FROM TV ADS, AND THEY USE THE **EXTRA AIRTIME**; THEY WERE ALL **WELL OVER A MINUTE LONG****

With a clear video strategy focused on creative content and user engagement, Activision's most popular game franchise, the first-person shooter series **Call of Duty** has pulled **1.9 million subscribers** to its YouTube channel and more than half a billion video views of its professional content, such as trailers and behind-the-scenes clips.

"We look to YouTube as one of the most important communication media we have, and a super large percent of our content is created for YouTube exclusively."

Jonathan Anastas, Activision's VP-Digital Marketing



HARLEM SHAKE WAS THE MOST SEARCHED TOPIC ON YOUTUBE IN 2013

1.7 MILLION

Videos posted of or about the Harlem Shake

2.5 BILLION

Views of those videos posted on YouTube

The meme was established by teenagers in Australia, and **brands uploading their own videos received millions of views**

REDBULL
7 MILLION VIEWS

PEPSI
7 MILLION VIEWS

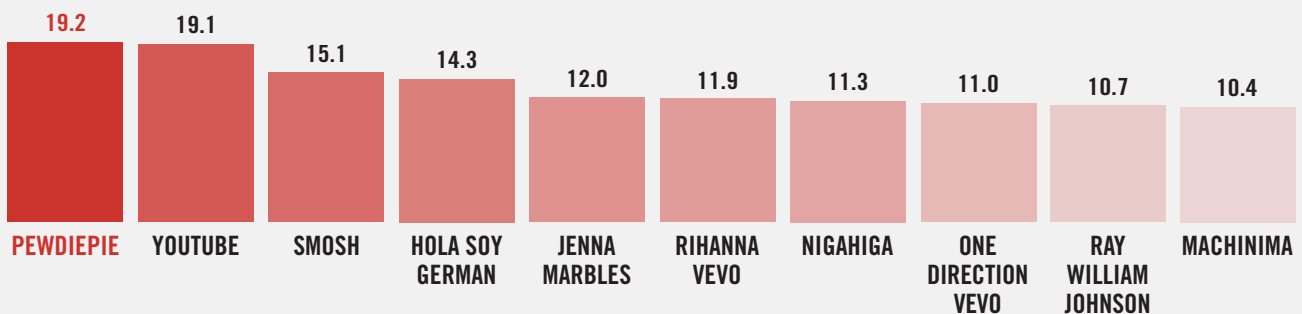
TOPSHOP
1.5 MILLION VIEWS

Visit www.youtube.com/trends for more trends on YouTube

(Global statistics, YouTube, December 2013)

TOP TEN CHANNELS OF 2013

(NUMBER OF GLOBAL SUBSCRIBERS – IN MILLIONS)



Top ten channels now have **13.4 MILLION SUBSCRIBERS** on average

The average number of subscribers of the top ten channels **GREW BY 23%** from Q3 to Q4 2013

(Global statistics, OpenSlate, December 2013)

Irrespective of device, YouTube preroll ads generated significant lift in unaided brand awareness vs. control

UNAIDED BRAND AWARENESS LIFT VS. CONTROL

17%

DESKTOP

(16 OF 18 CAMPAIGNS)

19%

SMARTPHONE

(16 OF 18 CAMPAIGNS)

(Global insights, Google/Ipsos Mobile Preroll Ad Effectiveness Study across nine countries, Q4 2013)

TrueView gives viewers choice and control over which ads they see and when. In experiments with real campaigns, we found that TrueView ads drive further engagement with advertised brands.

IMPACT ON SEARCHES

76%

In 12 of the tested campaigns, TrueView ads were 76% more likely to drive a (relevant) web or YouTube search behavior.

3x

In 13 campaigns, TrueView ads were 3x more likely to drive a relevant search on YouTube.

IMPACT ON ENGAGEMENT WITH ADVERTISER'S OWN MEDIA

74%

In 13 campaigns, TrueView ads generated 74% lift in those visiting the advertiser's site.

10x

In six of nine measured campaigns, TrueView ads were 10x more likely to drive engagement on the advertiser's YouTube channel.

Visit www.google.com/think/products/youtube-trueview.html for more information on TrueView

(U.S. results, Google/Complete experiments, Q4 2013)



CASE STUDY

EXTRA SPACE STORAGE

Extra Space Storage boosted its share of online conversions 14x with a cross-channel hyper-local campaign.

EXTRA SPACE STORAGE leveraged its YouTube brand channel and social channels, including G+, to showcase its space rental solutions with how-to videos—one of the most popular genres on YouTube—and connect with customers.

THIS CONTENT CURATION STRATEGY GENERATED:

- 200,000 engagements on their YouTube channel
- 14x growth in their share of rentals from online conversions
- 2-3x ROI on the marketing investment created by targeted search and display ads
- 6% increase in conversion rates from prospects who viewed their how-to videos on YouTube

www.google.com/think/case-studies/extra-space-storage-google-video.html

Useful links

Want to learn more? Check out the links below.

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THE POWER OF GEN C

The Collection

<http://www.google.com/think/collections/the-power-of-gen-c.html>

The Article

<https://www.google.com/think/articles/the-power-of-gen-c-connecting-with-your-best-customers.html>

Gen C Around the World (infographic)

<http://www.google.com/think/infographics/gen-c-around-the-world.html>

Connecting with Gen C on YouTube (infographic)

<http://www.google.com/think/infographics/connecting-with-gen-c-on-youtube.html>

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TOP TEN MOST SUBSCRIBED COOKING AND FOOD CHANNELS

Epic Mealtime

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

Rosanna Pansino

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

Laura Vitale's Kitchen

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

Food Wishes

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

Cooking with Dog

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

Sorted Food

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

Nicko's Kitchen

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

Jamie Oliver

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

Yoyomax12

<http://www.youtube.com/user/yoyomax12>

O Rolê Gourmet

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

Jamie Oliver FoodTube Channel

<http://www.google.com/think/case-studies/jamie-oliver-youtube-case-study.html>

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YOUTUBE ADS LEADERBOARD

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

Evian – Baby & Me

<http://www.youtube.com/watch?v=pfxB5ut-KTs>

Dove – Real Beauty Sketches

<http://www.youtube.com/watch?v=XpaOjMXyJGk>

Internet Explorer – Child of the 90s

<http://www.youtube.com/watch?v=qkM6Rjf15cg>

Pepsi Max – Test Drive

<http://www.youtube.com/watch?v=Q5mHPo2yDG8>

Poopouri – Girls don't Poop

<http://www.youtube.com/watch?v=ZKLnhuzh9uY>

Activision – Call of Duty

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

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TOP TEN BRAND CHANNELS

PewDiePie

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

YouTube

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

Smosh

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

Hola Soy German

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

Jenna Marbles

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

Rihanna VEVO

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

Nigahiga

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

One Direction VEVO

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

Ray William Johnson

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

Machinima

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

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Trueview

<http://www.google.com/think/products/youtube-trueview.html>

Extra Space Storage

<http://www.google.com/think/case-studies/extra-space-storage-google-video.html>

RESEARCH

Openslate

<http://outriggermedia.com>

Tubular Labs

<http://tubularlabs.com>

TELL US WHAT YOU THINK AT

g.co/ytinsightsfeedback

WANT THE REPORT? FIND IT AT

<http://google.com/think/youtube-insights>