What 18-34 year-olds want from brands

18-34 year-olds choose brands that engage them on their passions, give them choice and keep them entertained. Learn how to win them over in this issue.
Executive Summary

**AUDIENCE**

YouTube is a lifestyle choice for 18-34 year-olds

18-34 year-olds choose YouTube as the best platform to explore their passions

**CONTENT**

YouTube’s top brand channels show how to turn viewership to fanship

Top brand channels stay relevant by publishing an average of 31 videos each month

**IMPACT**

See how YouTube ads influence purchases more strongly than TV

Learn from research findings and the success stories of Hyatt and others

*Among the 10 platforms surveyed: YouTube, Hulu, ESPN.com, Facebook, ComedyCentral.com, Tumblr, Instagram, Vimeo, AOL, MTV.com
YouTube and Google are daily destinations for consumers. In this section, gain insights into the behaviors and attitudes of your audience so that you can turn them into fans for your brand.

YouTube reaches more 18-34 year-olds than any cable network

<table>
<thead>
<tr>
<th>Network</th>
<th>% Reach</th>
</tr>
</thead>
<tbody>
<tr>
<td>YouTube</td>
<td>48%</td>
</tr>
<tr>
<td>TBS</td>
<td>44%</td>
</tr>
<tr>
<td>FX</td>
<td>43%</td>
</tr>
<tr>
<td>CW</td>
<td>41%</td>
</tr>
<tr>
<td>Comedy Central</td>
<td>41%</td>
</tr>
</tbody>
</table>

Source: US Statistics, Nielsen 3 Month Average, Dec 2013 to Feb 2014

YouTube reaches 6x more 18-34 year-olds than Top 5 full-episode-players combined

Top 5 full-episode-players: Hulu, ABC, NBC, CBS, & Fox

Source: US Statistics, comScore Video Metrix—Feb 2014, Base: Total 18-34 YO population
Brands win over 18-34 year-olds by igniting their passions

18-34 year-olds choose brands 2x more strongly when brands engage them on their passions and interests vs. grab their attention with a one-off viral video.


18-34 year-olds choose YouTube as the best platform to explore their passions

Indexed against YouTube. YouTube was chosen as the best platform.

<table>
<thead>
<tr>
<th>Platform</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>YouTube</td>
<td>100%</td>
</tr>
<tr>
<td>Facebook</td>
<td>49%</td>
</tr>
<tr>
<td>ESPN</td>
<td>40%</td>
</tr>
<tr>
<td>Tumblr</td>
<td>23%</td>
</tr>
<tr>
<td>Instagram</td>
<td>21%</td>
</tr>
</tbody>
</table>


18-34 year-olds choose YouTube as the best place to watch content that people like them are also watching

Indexed against YouTube. YouTube was chosen as the best platform.

<table>
<thead>
<tr>
<th>Platform</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>YouTube</td>
<td>100%</td>
</tr>
<tr>
<td>ESPN.com</td>
<td>63%</td>
</tr>
<tr>
<td>Hulu</td>
<td>63%</td>
</tr>
<tr>
<td>Facebook</td>
<td>40%</td>
</tr>
<tr>
<td>ComedyCentral.com</td>
<td>40%</td>
</tr>
</tbody>
</table>

YouTube is where 18-34 year-olds choose to hear from brands

YouTube is the best choice for 18-34 year-olds to learn about a product that interests them

Indexed against YouTube. YouTube was chosen as the best platform

100

Facebook     56
Instagram    29
Tumblr       26
ESPN.com     20

Source: US Statistics, Google Consumer Surveys, March 2014, see Q4 in appendix. Other 5 surveyed: Vimeo, AOL, Hulu, comedycentral.com, MTV.com

18-34 year-olds are 4x more interested in watching a video ad on YouTube vs. any other platform

Indexed against YouTube. YouTube was chosen as the best platform

100

Hulu         24
ESPN.com     21
Facebook     19
Comedy Central.com 15

Source: US Statistics, Google Consumer Surveys, March 2014, see Q5 in appendix. Other 5 surveyed: Tumblr, Instagram, Vimeo, AOL, MTV.com
Content

Everyone can be a content creator on YouTube. YouTube exists because people love something so much, they have to share it with others. In this section, learn the insights behind the most popular content on YouTube.

Top YouTube Brand Channels

#1 GoPro  #2 Six Pack Shortcuts  #3 PlayStation

Find out more at: www.thinkwithgoogle.com

Based on an algorithm that factors in multiple signals of audience passion and popularity, such as watch time, repeat viewership, likes and shares

Top YouTube Channels

Global Subscribers, Millions

<table>
<thead>
<tr>
<th>Channel</th>
<th>Subscribers, Millions</th>
</tr>
</thead>
<tbody>
<tr>
<td>PewDiePie</td>
<td>26</td>
</tr>
<tr>
<td>YouTube Spotlight</td>
<td>22</td>
</tr>
<tr>
<td>Smosh</td>
<td>17</td>
</tr>
<tr>
<td>Hola Soy German</td>
<td>17</td>
</tr>
<tr>
<td>RihannaVEVO</td>
<td>13</td>
</tr>
</tbody>
</table>

Source: Global Statistics, Outrigger Media, OpenSlate, March 2014
Which ads are blooming in Spring 2014?

Top ads on YouTube Ads Leaderboard

Budweiser

- **Ad name:** Budweiser Super Bowl XLVIII Commercial | "Puppy Love"
- **Creative agency:** Anomaly

- **Views:** 28 Million

Maserati

- **Ad name:** Official Maserati Super Bowl Spot | 2014 Ghibli - Strike
- **Creative agency:** Wieden + Kennedy

- **Views:** 12 Million

Save the Children UK

- **Ad name:** Most Shocking Second a Day Video
- **Creative agency:** Don't Panic

- **Views:** 28 Million

Find out more at: www.thinkwithgoogle.com/ads-leaderboards

The Top 500 Brands on YouTube have grown their average monthly views by 70% in 2013

Find out more at: www.openslatestudios.com/news

Source: Global Statistics, Outrigger Media, OpenSlate, April 2014
Mercedes-Benz achieved an astonishing 69% view rate on their 14-minute TrueView ad.

**Build**
excitement leading up to the campaign

**Create**
a collection of short videos and a more immersive Director’s Cut to engage the audience

Find out more at: www.thinkwithgoogle.com/brand-case-studies

18-34 year-olds multi-task as they watch TV, not as much when they are on YouTube.

<table>
<thead>
<tr>
<th></th>
<th>Percent doing something else while watching the content</th>
<th>Percent of interactions where other device was used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live TV</td>
<td>75%</td>
<td>20%</td>
</tr>
<tr>
<td>YouTube</td>
<td>50%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Source: Google-IPSOS Mobile Diaries Research, Q1 2014
Impact

YouTube and Google drive powerful results for your brand. In this section, uncover insights with case studies, research and best practices from brands and YouTube creators.

Broadway's Cinderella saw a 12% increase in ticket sales with its first ever TrueView campaign

Test and optimize the creative and target new audiences never reached before through YouTube

Reinforce the TrueView campaign with branded search, Google Lightbox Ads and remarketing to broaden reach

Find out more at: www.thinkwithgoogle.com/brand-case-studies
Brand USA boosted travel intent 22% by building a unique cross-channel brand experience

CASE STUDY

Create
a beautiful digital travel guide within Lightbox Ads for influencing customers to visit the US and engaging them before, during and after their trip

Engage
potential customers consistently with an integrated presence across the Google Display Network, YouTube and Google+

Find out more at: www.thinkwithgoogle.com/brand-case-studies

Hyatt won over a new audience with Google Brand Solutions

CASE STUDY

Custom-build
entertaining video content to win the hearts of female business travelers, a new target audience for Hyatt

Reach
17 million users and create 500 engagements from this new audience with Lightbox ads and YouTube TrueView Ads

Find out more at: www.thinkwithgoogle.com/brand-case-studies
YouTube influences recent purchases more strongly than TV

% agreement on influence of YouTube vs. TV for recent purchasers

<table>
<thead>
<tr>
<th>Category</th>
<th>YouTube</th>
<th>TV</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beauty products</td>
<td>78%</td>
<td>49%</td>
</tr>
<tr>
<td>Smartphones</td>
<td>61%</td>
<td>52%</td>
</tr>
<tr>
<td>Automotive vehicles</td>
<td>73%</td>
<td>60%</td>
</tr>
</tbody>
</table>

Source: US Statistics, Google-TNS Audience Study, October 2013, see Q6 in the appendix

YouTube masthead drives significant engagement

71% of campaigns had significant search lift. Exposure to YouTube masthead resulted in:

- 4x increase in subsequent (relevant) search activity vs. non-exposed

79% of campaigns had significant lift in watching advertiser’s videos. Exposure to YouTube masthead resulted in:

- 13x increase in subsequent watching of advertiser’s videos on YouTube vs. non-exposed

Research based on meta-analysis across 473 masthead campaigns on YouTube that ran between 2009-2014, measuring the lift of exposed consumers vs non-exposed. Source: US Results, Google meta-analysis, Q1 2014
Useful Links

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

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TOP CHANNELS ON YOUTUBE
PewDiePie
www.youtube.com/user/pewdiepie
YouTube Spotlight
www.youtube.com/user/youtube
Smosh
www.youtube.com/user/smosh
Hola Soy German
www.youtube.com/user/holaSoygerman
RihannaVEVO
www.youtube.com/user/rihannaVeVo

TOP YOUTUBE BRAND CHANNELS
GoPro
www.youtube.com/user/GoProCamera
Six Pack Shortcuts
www.youtube.com/user/sixpackshortcuts
PlayStation
www.youtube.com/user/PlayStation
Brand Channels Leaderboard

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Top ads on YouTube Ads Leaderboard
www.thinkwithgoogle.com/ads-leaderboards/

“The Top 500 Brands on YouTube have grown their average monthly views by nearly 70% in the past year”
www.openslastudios.com/news

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Mercedes-Benz

Page 9
Broadway's Cinderella
www.thinkwithgoogle.com/case-studies/youtube-broadway-cinderella-story.html

Page 10
Brand USA
www.thinkwithgoogle.com/case-studies/case-study-brand-usa.html
Hyatt

Appendix

Page 4
18-34-year-olds connect 2x more strongly with brands that engage them on their passions and interests vs. grabbing their attention with a one-off viral video

Question 1: Please look at the list of attributes and indicate how important each is to you in selecting a brand - pairwise comparisons

Page 4
18-34-year-olds choose YouTube as the best platform to explore their passions

Question 2: Which of the following sites, if any, do you use to learn about something you are passionate about (i.e. running, cooking)?

Page 4
18-34-year-olds choose YouTube as the best place to watch content that people like them are also watching

Question 3: Please select the answer that best completes this sentence: ‘I know that when I’m watching (blank) I’m watching what other people like me are watching’

Page 5
YouTube is the best choice for 18-34-year-olds to learn about a product that interests them

Question 4: Which of the following sites, if any, do you use to learn about products you are interested in (i.e. smartphone, beauty product, etc)?

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18-34-year-olds are 4x more interested in watching a video ad on YouTube vs. any other platform

Question 5: If you were to watch one video ad about a product/service, where would you rather watch it?

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YouTube influences recent purchases more strongly than TV

Question 6: Overall, how influential was each of the following in your decision to make your purchase?

Tell us what you think at: g.co/ytinsightsfeedback