

VIDEO ADVERTISING BUREAU - REPORT 2019

# TV Preferred

Understanding YouTube Enthusiasts'  
Affinity For Video Content

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- 3 YouTube Enthusiasts' Emotional Connection To TV Programming
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# The VAB Conducted A Custom Survey Quantifying The Emotional Attachment Between TV Programming & YouTube Content

## Survey Methodology

The VAB commissioned *Research Now* to conduct the *Program Engagement Survey* fielded online in April 2018 with 1,000 Adult 18+ respondents surveyed.

## Objectives

- **Primary**: To understand the emotion viewers exhibit for ad-supported TV programs and how they express their attachment through their behaviors
- **Secondary**: Compare their commitment to TV programming against how they engage with original YouTube content

Note: Ad-supported TV programs are defined as programs that are currently airing or originally aired on broadcast or cable TV, inclusive of all devices and methods of viewing (e.g. watching *Breaking Bad* on Netflix or catching up on recent episodes of *This is Us* on Hulu or viewing through network apps such as CBS All Access). All respondents live in a household that subscribes to a cable, telco or satellite TV service.



# This Report Specifically Focuses On “YouTube Enthusiasts” - Respondents Who Regularly Watch Original YouTube Content

## Respondent Focus: “The YouTube Enthusiast”

- YouTube Enthusiasts are respondents who watch original YouTube content 2x or more per month
  - *YouTube Original Content* is defined as videos that were produced by an established YouTube personality that are only available on YouTube and do not appear on broadcast or cable TV. This does not include user generated videos (e.g. cat videos), professionally-produced music videos, or TV program content (e.g. clips from Late Night with Stephen Colbert)
- 375 respondents (37.5%) identified themselves as YouTube Enthusiasts



## Why are Emotions Important?

...They Drive Intention & Build Brands

Someone who is highly attached is **3x** more likely to engage with the brand.

They are less price sensitive, go deeper into the product line and have a higher lifetime value to an advertiser.

“Emotions lead to action, while reason leads to conclusions.”

Neurologist, Donald B. Caine



# When It Comes To Video Consumption, It's About “More” Not “Either/Or”

Naturally, the YouTube Enthusiast has an inherent affection towards the YouTube platform but that doesn't mean they exclusively desire only digital-based, snackable, UGC content.

In fact, YouTube Enthusiasts are video addicts that are highly engaged with content across platforms including long-form, professionally-produced episodic programming from ad-supported TV.

When thinking about this segment, it's important to understand that it's not an “either/or” proposition between YouTube and TV but rather a desire for “more” content across platforms.

This report quantifies the ways the YouTube Enthusiast demonstrates their commitment, engagement and passion for TV programming as compared to all Adults. Then we compare this behavior to their engagement with original YouTube content.

The results may surprise you...



# YouTube Enthusiasts: Topline Findings

## They Are Voracious Video Viewers Across Platforms

In addition to all the digital video they consume, including YouTube, their consumption of ad-supported TV is also on par with the average adult

## They Are Emotionally Engaged With TV Programming

Their deep emotional connection to TV motivates them to actively engage beyond the TV airings - they share and post video clips, follow actors on social media, read recaps, discuss with family & friends and buy goods and services related to what they see on TV



## They Are More Committed To TV Programming Than To Original YouTube Content

Because of complex storylines and rich character development, they are more likely to prioritize and feel emotionally connected to TV programs and characters than to original YouTube content & YouTube personalities

# YouTube Enthusiasts Are Voracious Video Viewers Across Platforms

## They Are Voracious Video Viewers Across Platforms

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## They Are Emotionally Engaged With TV Programming

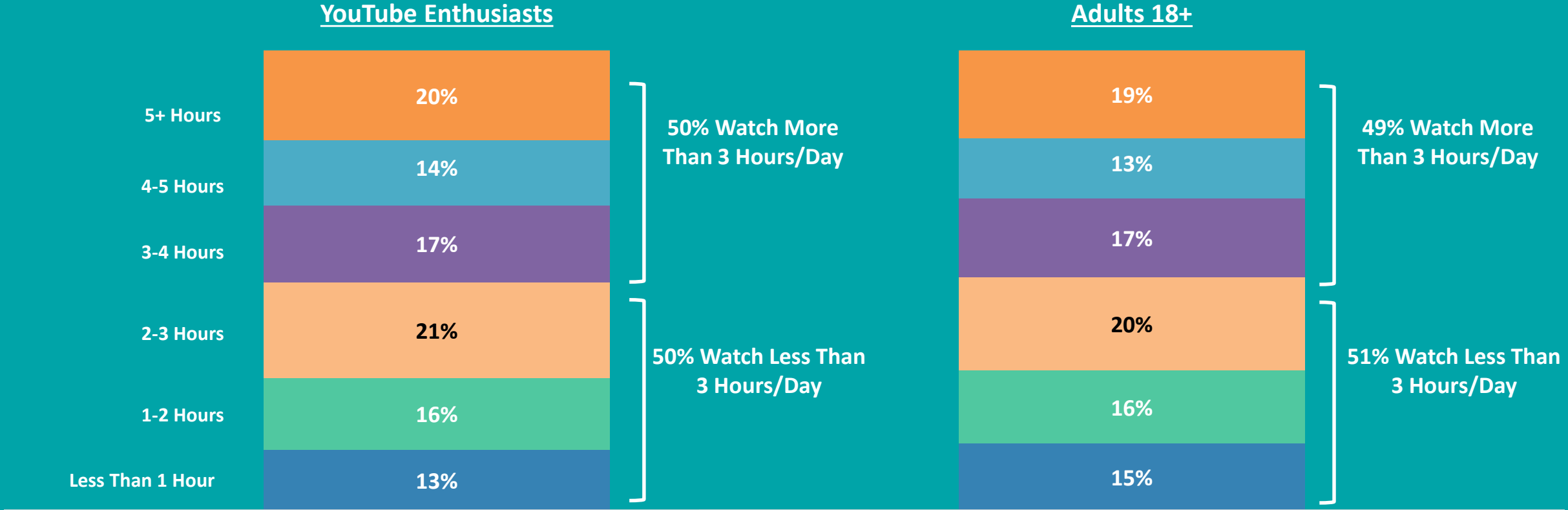
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# YouTube Enthusiasts Are Voracious Video Viewers Who Watch Just As Much Ad-Supported TV As The Average Adult

## Hours Watched of Ad-Supported Cable/Broadcast TV Per Day

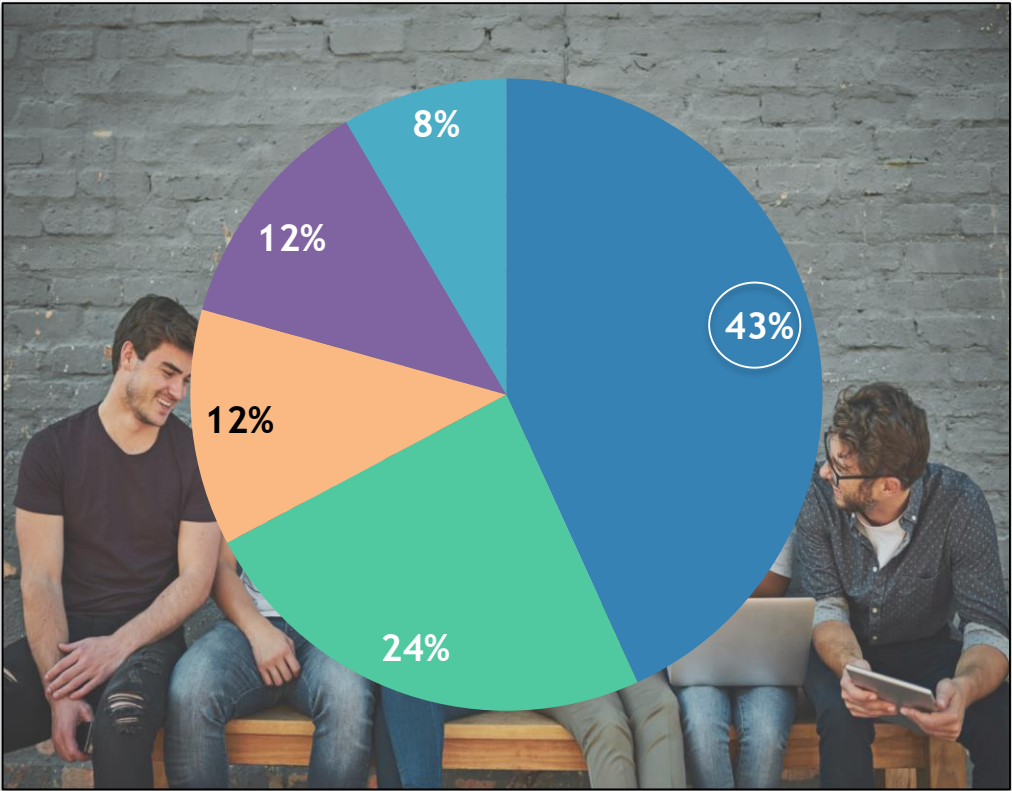


Source: VAB / Research Now “Program Engagement” Survey, April 2018. S3. On average, how much time do you spend watching broadcast (i.e. ABC, CBS, NBC, Fox) or Cable (i.e. ESPN, AMC, FX, CNN, TBS, HGTV, etc.) TV content in a given day? YouTube Enthusiasts = Respondents who watch original YouTube content 2x or more per month (375). Total Respondents=1,001. Numbers may exceed 100% due to rounding.

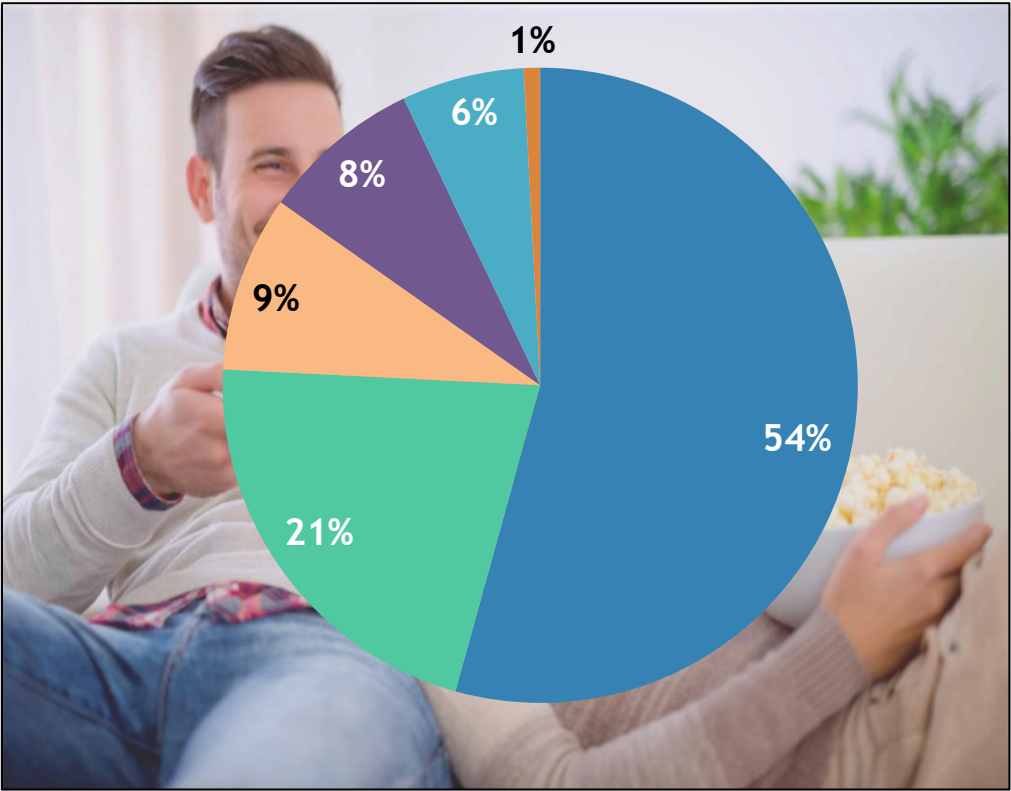
# YouTube Enthusiasts Watch Their Favorite TV Programs Through A Variety Of Video Sources But Favor Ad-Supported Cable & Broadcast Over Any Other Platform

The 43% is most likely even higher specifically for ad-supported TV as it doesn't take into account the Cable and Broadcast programming being watched on Hulu and other ad-supported streaming apps

YouTube Enthusiasts



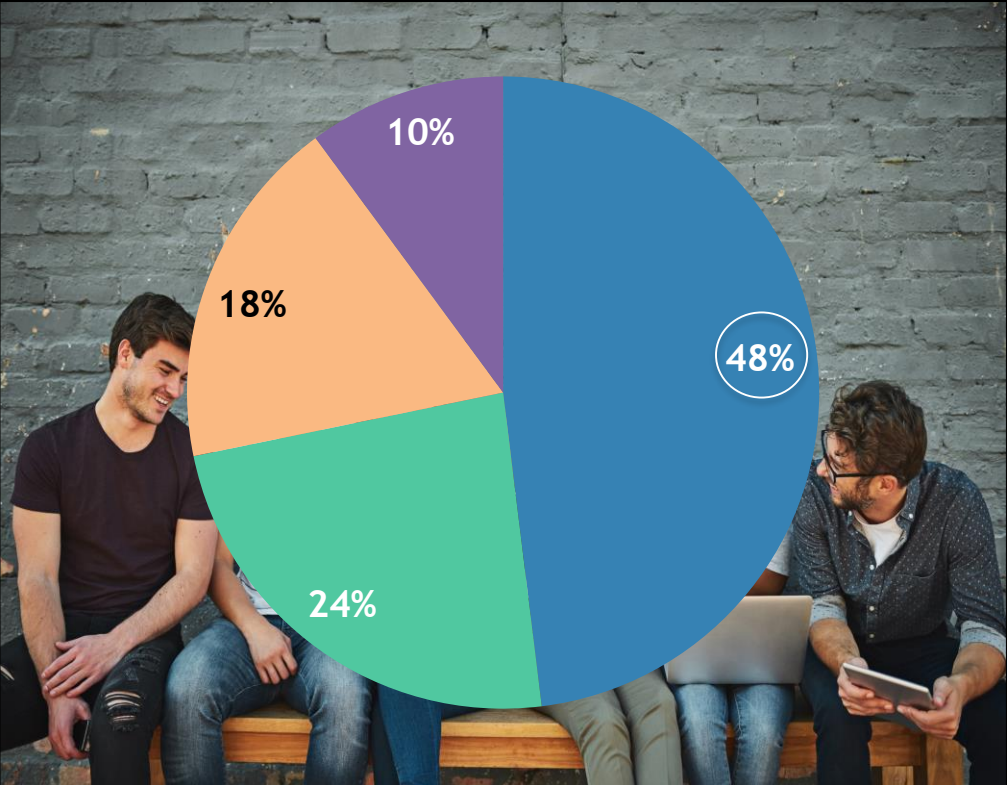
Adults 18+



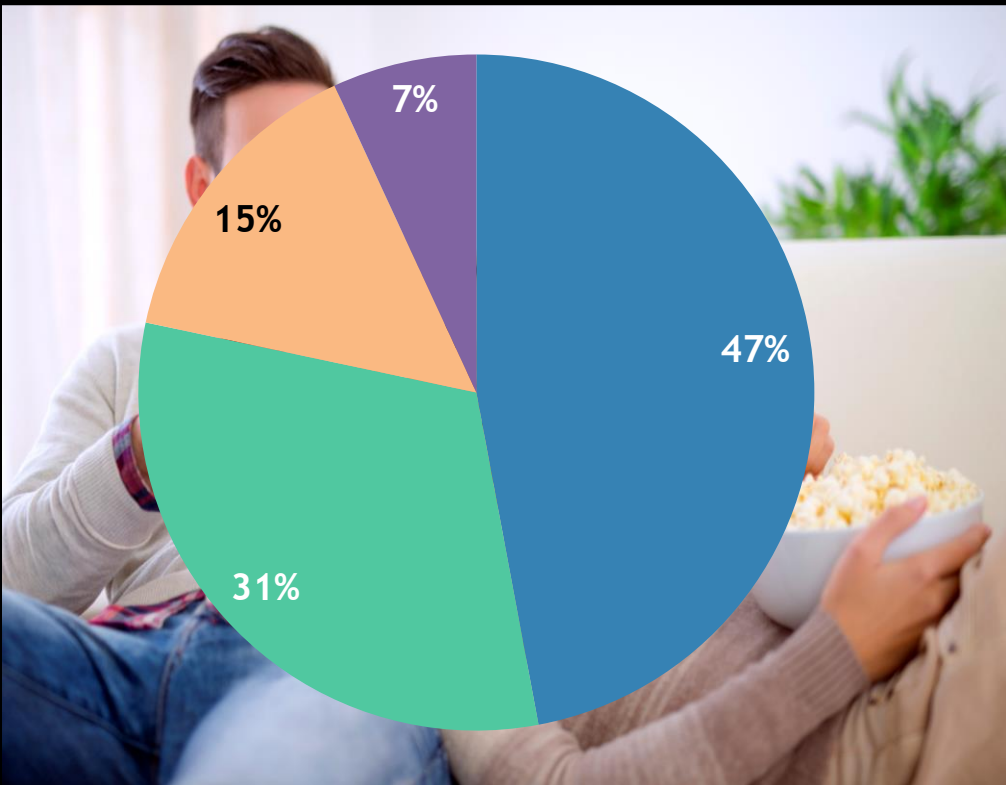
On Ad-Supported Cable/Broadcast   On Netflix   On Amazon Prime   On Hulu   Streaming / On-Demand App / Provider (other than Netflix, Hulu & Amazon)   Other

# YouTube Enthusiasts Thrive On Conversation & Community With Others Which Is Why “Live” Viewing Is The Most Popular Way For Them To Watch Their Favorite TV Programs

YouTube Enthusiasts



Adults 18+



- Live as it airs
- Time-shifted / through a DVR (another time, after it airs, delayed time)
- Via a streaming service or OTT app (i.e. Netflix, Hulu, CBS All Access)
- On Video-On-Demand (VOD) through a cable or set top box

Source: VAB / Research Now “Program Engagement” Survey, April 2018. Q12: How do you prefer to watch your favorite TV programs? Q13.5: Please rate how much you agree or disagree with the following statements. *I like to watch my favorite TV programs with my friends / family.* % of Respondents who agree-Top 2 Box (net). YouTube Enthusiasts = Respondents who watch original YouTube content 2x or more per month (375). Total Respondents=1,001.

# YouTube Enthusiasts Are Emotionally Engaged With TV Programming

## They Are Voracious Video Viewers Across Platforms

In addition to all the digital video they consume, including YouTube, their consumption of ad-supported TV is also on par with the average adult



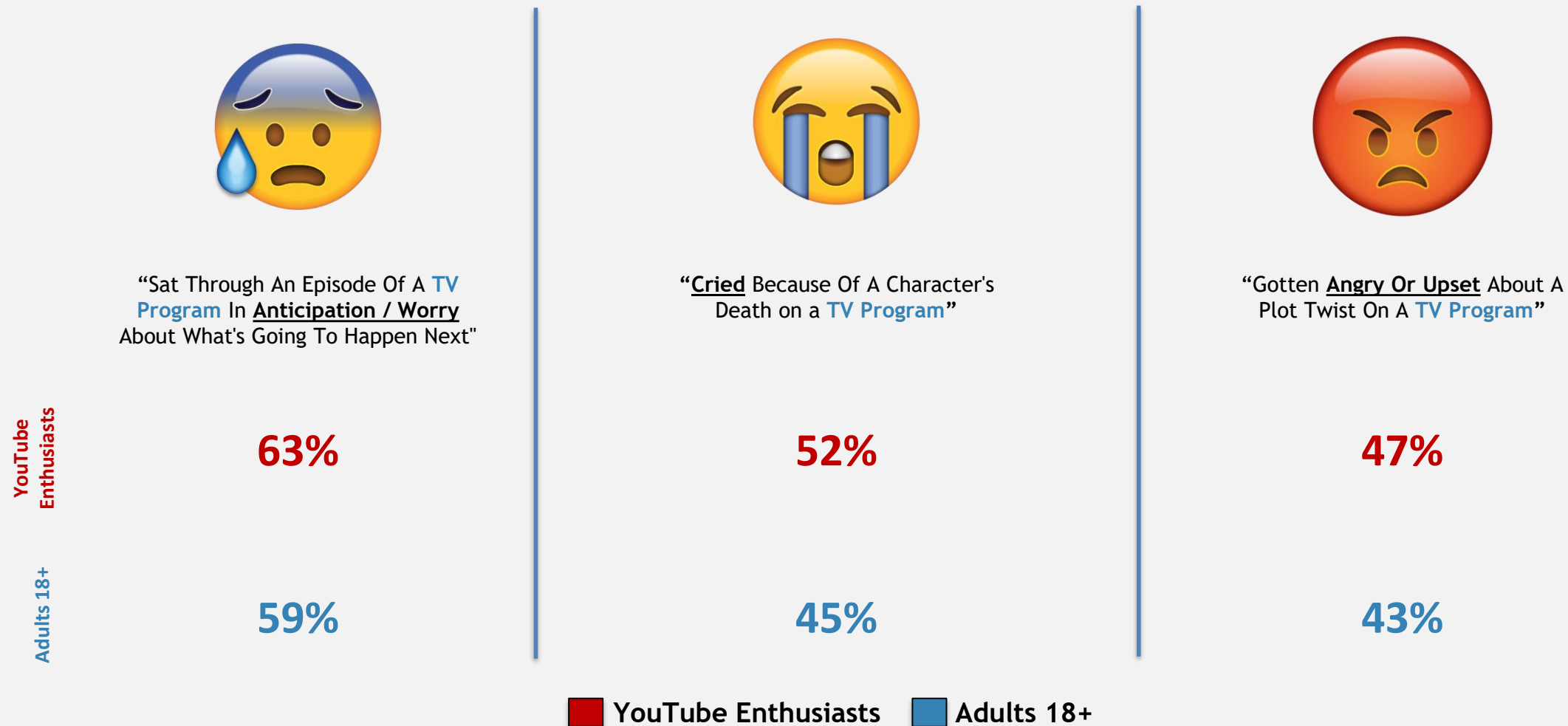
## They Are Emotionally Engaged With TV Programming

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## They Are More Committed To TV Programming Than To Original YouTube Content

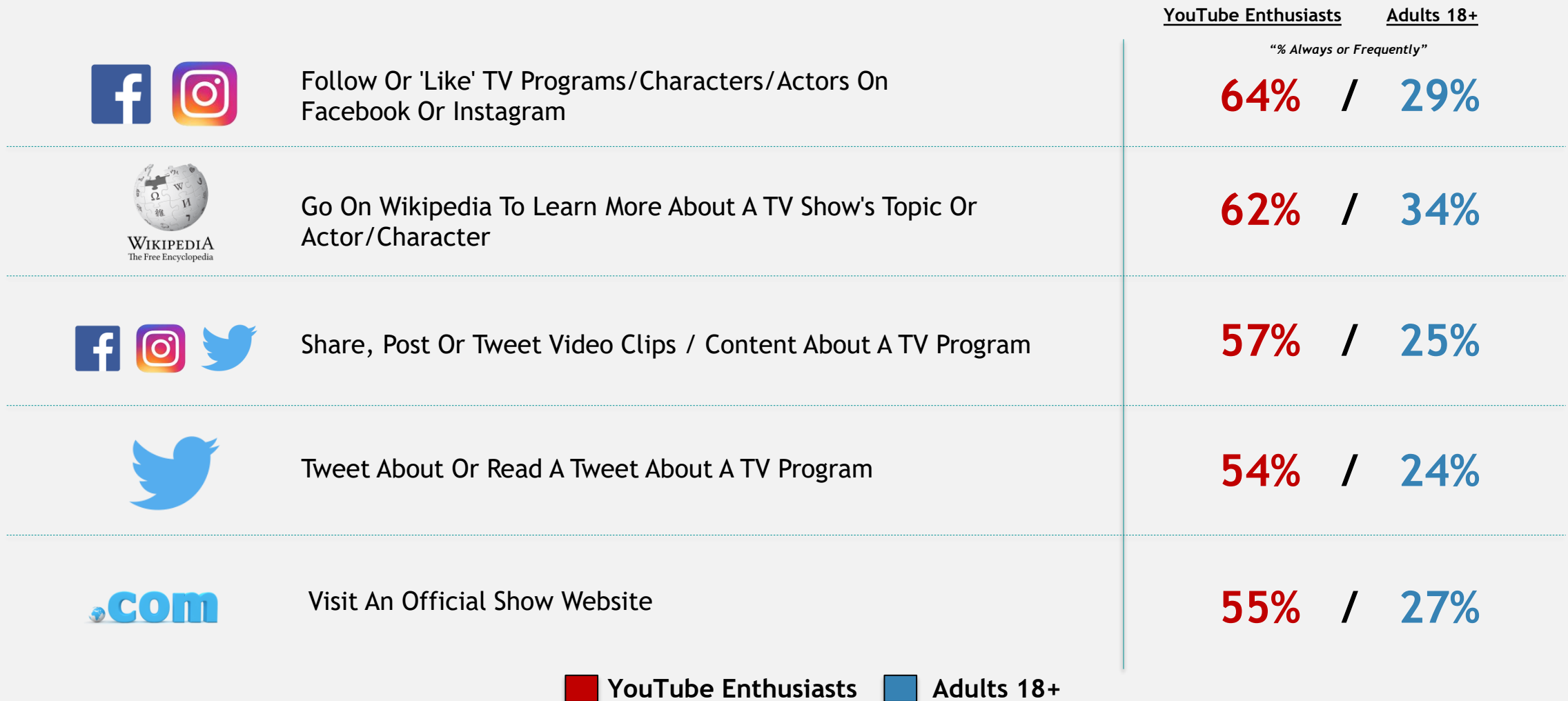
Because of complex storylines and rich character development, they are more likely to prioritize and feel emotionally connected to TV programs and characters than to original YouTube content & YouTube personalities

# YouTube Enthusiasts Are More Likely Than The Average Adult To Experience Intense Emotions While Watching TV Due To Their Deep Connection With The Content



Source: VAB / Research Now "Program Engagement" Survey, April 2018. TV: Q8: Which of the following statements are true for you? YouTube Enthusiasts = Respondents who watch original YouTube content 2x or more per month (375). Total Respondents=1,001.

# This Emotional Bond With TV Programming Inspires Much Further Engagement On Digital Platforms Before, During, And After The Program Airs



# TV Programming Also Inspires YouTube Enthusiasts In Their Everyday Lives



“I have used a TV-related phrase in a conversation with family/friends/co-workers”



“I was inspired to make a food recipe based on a TV show or segment”



“I have dressed up like A TV character for Halloween or a themed party”

YouTube Enthusiasts

54%

52%

42%

Adults 18+

50%

41%

24%

■ YouTube Enthusiasts ■ Adults 18+

# Most Importantly, This Deep Relationship YouTube Enthusiasts Have With TV Content Influences Their Purchasing Decisions



“I have eaten at a restaurant because it, or its chef / owner, was featured on a TV show”

49% / 37%

132 index vs. A18+



“I have visited a location / vacationed at a place because it was featured on a TV show”

46% / 33%

139 index vs. A18+



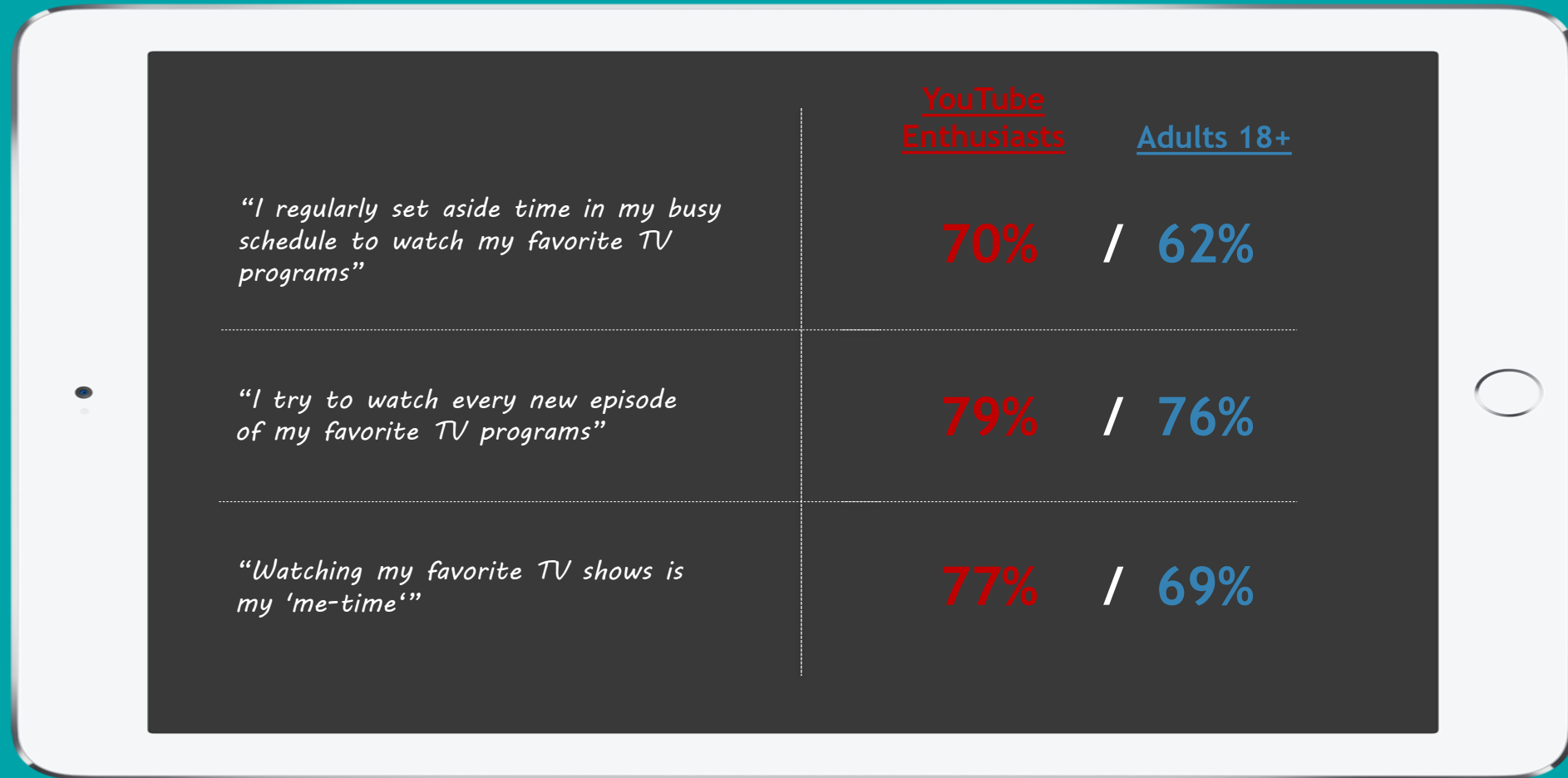
“Purchase a product I saw while watching a TV program (either a product I saw in an ad or in the actual program)”

56% / 25%

224 index vs. A18+

YouTube Enthusiasts Adults 18+

# In Terms of Their Favorite TV Programs, A Majority Of YouTube Enthusiasts Specifically Set Aside Some “Me Time” To Watch Every Episode



■ YouTube Enthusiasts ■ Adults 18+

# YouTube Enthusiasts Crave The Complex Storylines And Rich Character Development Of Their Favorite TV Programs

YouTube Enthusiasts are particularly drawn to the actors, characters, and plotlines of their favorite TV programs.



“I feel personally connected to the characters of my favorite TV programs”

50% / 34%



“I have looked up the actors in the show to learn more about them ‘off the screen’ or to see what other shows/films they have been in”

59% / 52%



“I have watched other shows or movies because an actor from one of my favorite TV programs was in it”

60% / 55%

■ YouTube Enthusiasts   ■ Adults 18+

# Naturally, YouTube Enthusiasts Use YouTube As A Supplementary Destination To Get Even More TV-Related Content

Interestingly, they are **7% more likely** to post comments on a TV show-related video clip on YouTube than a video posted by their favorite YouTube personality.



*“% Always or Frequently”*

**“I Watch Video Clips  
From TV Shows On  
YouTube”**

**68% / 35%**

**“I Read Or Post  
Comments About TV  
Content On YouTube”**

**59% / 27%**

**“I Subscribe To Or Have  
Watched TV Show’s  
YouTube Channel”**

**40% / 18%**

 **YouTube Enthusiasts**    **Adults 18+**

# YouTube Enthusiasts Are *More Passionate* About TV Content Than The Average Adult

## YouTube Enthusiast vs. Adults 18+ (Index)



### Thirst For More

	<u>Index</u>
Visit A TV Show's Official Website	204
Follow Or "Like" TV Programs / Characters / Actors On Facebook Or Instagram	221
Go On Wikipedia To Learn More About A TV Show's Topic Or Actor / Character	182
Read Actor Or Cast News To Learn More About What's Going On "Behind The Scenes"	157



### Actively Engaged

	<u>Index</u>
Tweet About Or Read A Tweet About A TV Program	225
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Discuss TV Programs With Friends, Family & Co-workers	167
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### Attached To The Characters & Programs

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Watch Other Shows Or Movies Because An Actor From One Of Their Favorite Programs Was In It	109



### Inspired To Purchase

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Have Purchased A Product I Saw While Watching A TV Program (either a TV ad or in the actual program)	224
Visited A Location / Vacationed At A Place Because It Was Featured On A TV Show	139
Eaten At A Restaurant Because It, Or Its Chef / Owner, Was Featured On A TV Show	132

# YouTube Enthusiasts Are More Committed To TV Programming Than To Original YouTube Content

## They Are Voracious Video Viewers Across Platforms

In addition to all the digital video they consume, including YouTube, their consumption of ad-supported TV is also on par with the average adult



## They Are Emotionally Engaged With TV Programming

Their deep emotional connection to TV motivates them to actively engage beyond the TV airings - they share and post video clips, follow actors on social media, read recaps, discuss with family & friends and buy goods and services related to what they see on TV

## They Are More Committed To TV Programming Than To Original YouTube Content

Because of complex storylines and rich character development, they are more likely to prioritize and feel emotionally connected to TV programs and characters than to original YouTube content & YouTube personalities



## How We Define YouTube “Original Content”

YouTube Original Content refers to videos that were produced by an established YouTube personality that are only available on YouTube and do not appear on broadcast or cable TV. This does not include user generated videos (e.g. cat videos), music videos, or TV program content (e.g. clips from Late Night with Stephen Colbert)

Examples Include:



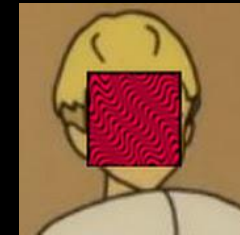
Smosh



Jackie Aina



GoodMythicalMorning



PewDiePie



LauraInTheKitchen



Lele Pons



DudePerfect



KSI



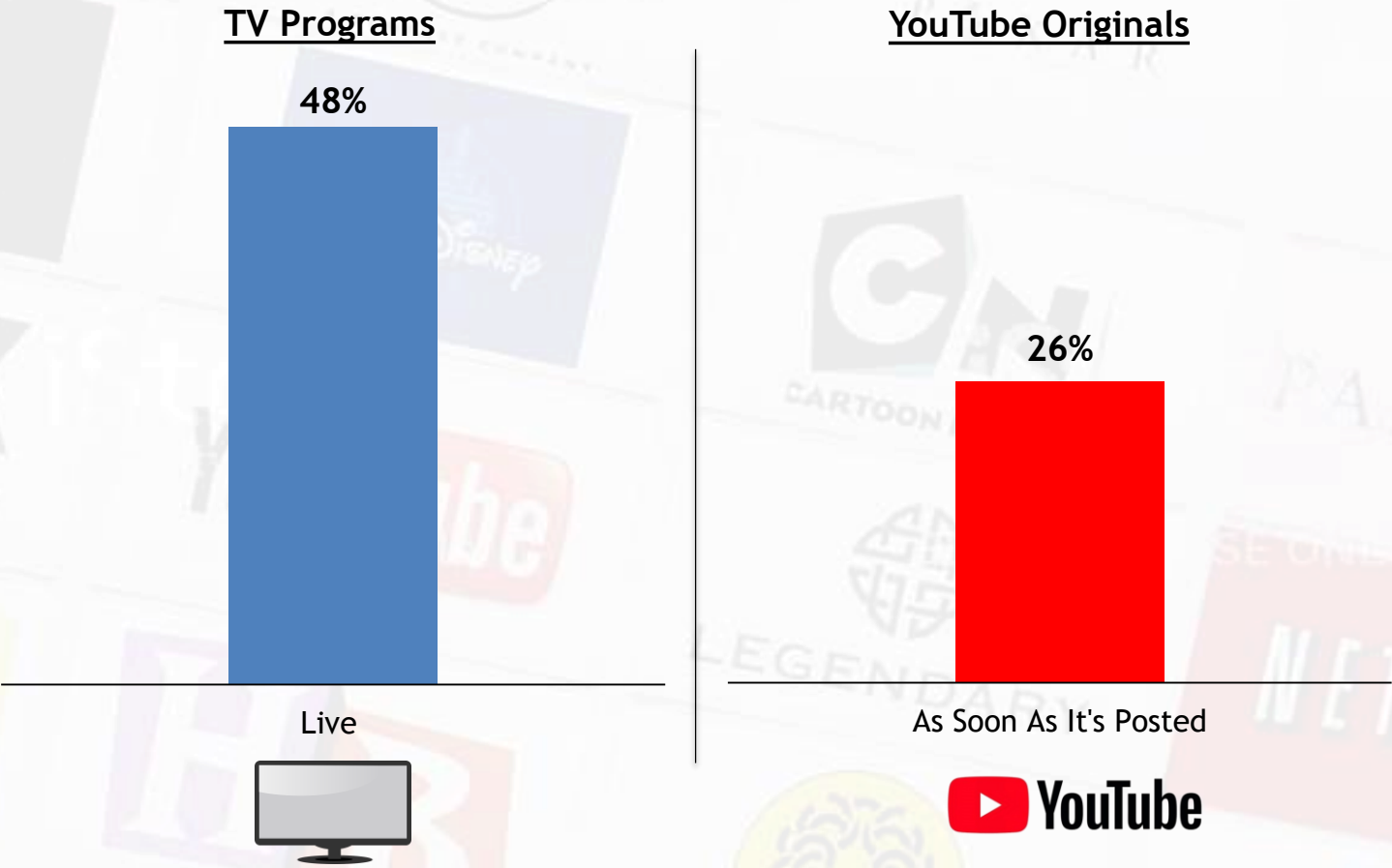
JennaMarbles



PopularMMOs

YouTube Enthusiasts don't have the same sense of immediacy to watch original YouTube videos as they do with TV programming since the platform lacks the scale of conversation & community that ad-supported TV delivers

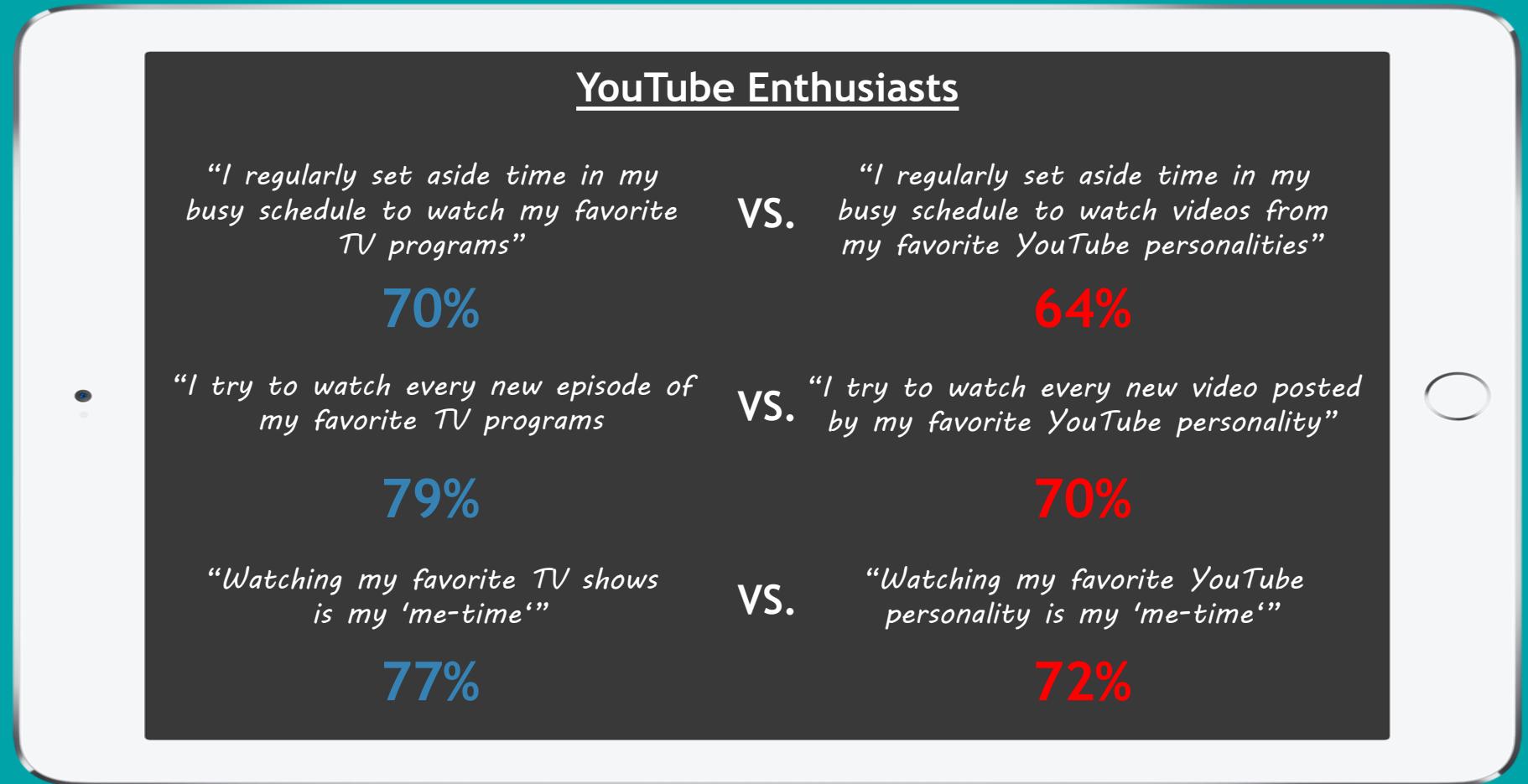
When Do YouTube Enthusiasts Prefer To Watch Content?



Source: VAB / Research Now "Program Engagement" Survey, April 2018. Q12: How do you prefer to watch your favorite TV programs? Q21: I watch new videos posted by my favorite YouTube Personality...; Time-shifted YouTube viewing includes viewing, within a few hours of posting, same day as posting, within a few days, within a few weeks, whenever I have time/don't know. Base: YouTube Enthusiasts = Respondents who watch original YouTube content 2x or more per month (375).

# YouTube Enthusiasts Are Video Addicts But They Are More Likely To Set Aside “Me Time” To Watch Their Favorite TV Show Than A Video From Their Favorite YouTube Personality

YouTube Enthusiasts Are Voracious Video Viewers And The YouTube Platform Complements Their TV Viewing Time



■ TV Programs ■ YouTube Original Videos

Source: VAB / Research Now "Program Engagement" Survey, April 2018. TV-Q13: Please rate how much you agree or disagree with the following statements; YouTube-Q18: Please rate how much you agree or disagree with the following statements. % of Respondents who agree-Top 2 Box (net). Base: YouTube Enthusiasts = Respondents who watch original YouTube content 2x or more per month (375).

# YouTube Enthusiasts Have A Higher Emotional Engagement With TV Programs Than They Do With Original YouTube Content

## Emotional Response to TV Programs and YouTube Original Content



“Laughed Out Loud Because Of Something That Happened On A **TV Program**”



**70%**

“Laughed Out Loud Because Of Something That A **YouTube Personality** Did”



**YouTube 61%**



“Sat Through An Episode Of A **TV Program** In Anticipation / Worry About What's Going To Happen Next”



**63%**

“Sat Through A Video Of A **YouTube Personality** In Anticipation / Worry About What's Going To Happen Next”



**YouTube 43%**



“Cried Because Of A Character's Death on a **TV Program**”



**52%**

“Cried Because Of Something That Happened In A Video Of An **Original YouTube Personality**”



**YouTube 34%**



“Gotten Angry Or Upset About A Plot Twist On A **TV Program**”



**47%**

“Gotten Angry Or Upset About Something A **YouTube Personality** Did”



**YouTube 34%**

# YouTube Enthusiasts Also Feel a Stronger Connection To Their Favorite TV Characters & Actors Than To Their Favorite YouTube Personalities

While YouTube personalities typically take center-stage on the platform, TV characters are more interesting to YouTube Enthusiasts because of their multifaceted complexity and involvement in intriguing storylines.



“I feel personally connected to the characters of my favorite **TV programs**”



“I feel personally connected to my favorite **YouTube personality**”



“I have watched other shows or movies because an actor from one of my favorite **TV programs** was in it”



“I have watched other videos, or video series, because my favorite **YouTube personality** was in it”



“I have looked up the actors in a **TV program** to learn more about them 'off the screen'”



“I have looked up my favorite **YouTube Personality** to learn more about them 'off the screen'”



Source: VAB / Research Now “Program Engagement” Survey, April 2018. TV: Q14: Keeping your favorite TV programs in mind, which of the following statements do you believe are true for you? YouTube: Q19: Keeping your favorite YouTube personalities in mind, which of the following statements do you believe are true for you? Check any that apply. Base: YouTube Enthusiasts = Respondents who watch original YouTube content 2x or more per month (375).

# YouTube Enthusiasts Are Also More Likely To Be Advocates For Their Favorite TV Programs Than For Their Favorite YouTube Personalities

“I discuss **TV programs** with friends, family, co-workers”



65%

“I discuss new videos from my **favorite YouTube personalities** with friends, family, co-workers”

**YouTube** 60%

“% After Every or Most Episodes / Video”



“I have tried to convince a friend to start watching my favorite **TV program**”



50%

“I have tried to convince a friend to start watching my **favorite YouTube personality**”

**YouTube** 40%

**YouTube Enthusiasts** **Adults 18+**

Source: VAB / Research Now “Program Engagement” Survey, April 2018. TV - Q16: How often do you typically do the following after watching a new episode of one of your favorite TV programs? YouTube - Q20: How often do you typically do the following after watching a new video from your favorite YouTube personality? Respondents who answered “After every/most episodes”. TV - Q15: Which of the following statements are true for you? YouTube - Q19: which of the following statements do you believe are true for? Check any that apply. YouTube Enthusiasts = Respondents who watch original YouTube content 2x or more per month (375). Total Respondents=1,001.

# Given Its Greater Emotional Engagement, It's No Surprise That TV Is More Likely To Motivate Purchase Than Original YouTube Content Among YouTube Enthusiasts

YouTube Enthusiasts are **51% more likely** to purchase a product that's been shown or featured on ad-supported TV than they are to purchase a product featured in a video by their favorite YouTube personality



**56%**

of YouTube Enthusiasts have purchased a product they saw while watching a TV program (either a product I saw in an ad or in the actual program)



**37%**

of YouTube Enthusiasts have purchased a product that their favorite YouTube personality has shown / featured during a video

# While YouTube Enthusiasts Are Voracious Video Viewers Across Platforms, They Are More Passionate About TV Programming Than Original YouTube Content

## YouTube Enthusiasts: Ad-Supported TV vs. Original YouTube Content (Index)



### Emotionally Connected

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115

Cried Because Of A Character's Death On A TV Program vs. Something That Happened In An Original YouTube Video

153

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110

Try To Watch Every New Episode Of Their Favorite TV Program vs. New Video Posted By Their Favorite YouTube Personality

113

Watch TV Programs Live vs. As Soon As A YouTube Video Is Posted

185



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#### Index

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125

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108



### Inspired To Purchase

#### Index

Purchased a product they saw while watching a TV program (either a product I saw in an ad or in the actual program) vs. purchased a product that their favorite YouTube personality has shown / featured during a video

151



## Parting Thoughts

YouTube Enthusiasts are video addicts that are highly engaged with content across platforms. It's not an "either/or" proposition between YouTube & TV but rather a desire for "more" content

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Rich character development and gripping storylines result in deep emotional engagement in TV programming, more so than for original YouTube content

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This deeper connection with TV inspires action - viewers hunt for more info on favorite actors and intriguing plotlines, discuss programs with friends and share on social media

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Most importantly, this greater emotional engagement means that YouTube enthusiasts are *51%* more likely to be inspired to purchase by TV programming than by original YouTube videos

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