

VIDEO ADVERTISING BUREAU - REPORT 2018

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Committed

Exploring Multicultural Viewers' Passionate
Relationship With TV Programming



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Multicultural Viewers Up Close

In the first report in our [Committed](#) series released earlier in 2018, we focused on Millennials' relationship with ad-supported TV and how the strong emotional bonds they develop with their favorite TV shows inspire deep engagement and motivates purchase.

In this second installment of our *Committed* series, we examine the emotional ties that Black and Hispanic viewers have with ad-supported TV and the differences that exist between each segment and, for comparison purposes, the Non-Hispanic White demographic.

As you'll see, Multicultural viewers' strong emotional engagement with TV programming often exceeds the high baselines achieved by Non-Hispanic White viewers.



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



Committed, A VAB Custom Survey Series, Quantifies Viewer Emotional Attachment And Engagement To TV Programming

Study Methodology

The VAB commissioned *Research Now* to conduct the *Program Engagement Survey* fielded online in April 2018 with 1,000 A18+ respondents surveyed.

From a multicultural perspective, these respondents included:

- 188 Hispanic respondents
- 160 Black respondents (African American/Black/Caribbean American)
- 744 Non-Hispanic White respondents

Study Objectives

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

Notes:

Methodology Note: there is some overlap between the Hispanic respondents and Black respondents as a small % of respondents identified themselves as both and thus are included in both demographic segments. The Asian demographic was excluded from this analysis.

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)

***Original YouTube Content:** Videos that were produced by an established YouTube personality that are only available on YouTube and do not appear on broadcast or cable TV. 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)



Topline Survey Findings On Multicultural Viewers

Motivated by their heavy emotional investment & intense need to be “part of the conversation,” multicultural viewers are highly vocal in sharing their thoughts & feelings online and with friends & family

Viewers actively engage beyond the TV airing - they share and post video clips, tweet throughout and after a new episode & follow actors on social media



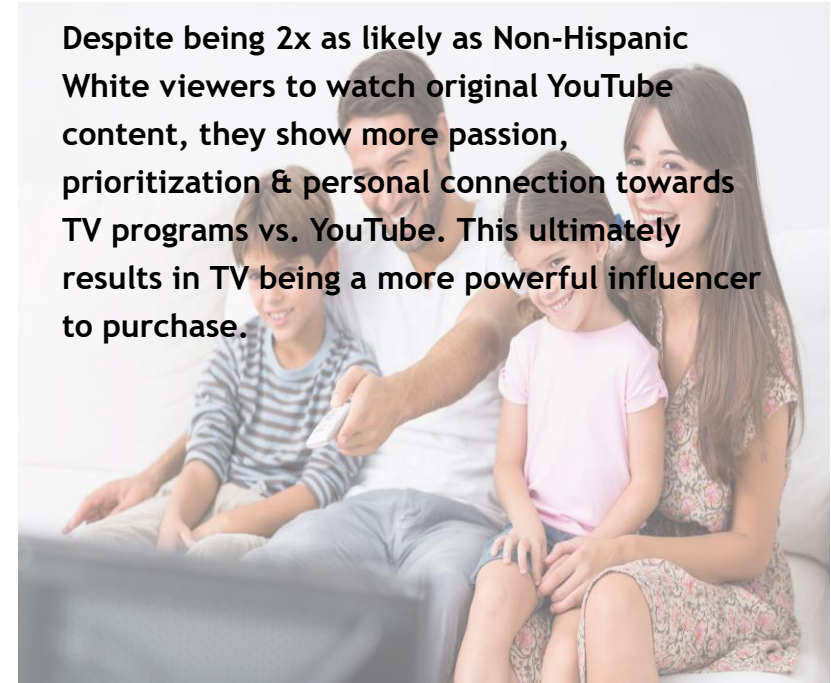
They have an insatiable need for consuming MORE content from their favorite shows, TV personalities or actors

From reading recaps and looking for spoilers, to researching other shows their favorite actors are in, they can't get enough of their favorite TV shows



Multicultural viewers feel a stronger emotional connection with TV content vs. YouTube content

Despite being 2x as likely as Non-Hispanic White viewers to watch original YouTube content, they show more passion, prioritization & personal connection towards TV programs vs. YouTube. This ultimately results in TV being a more powerful influencer to purchase.

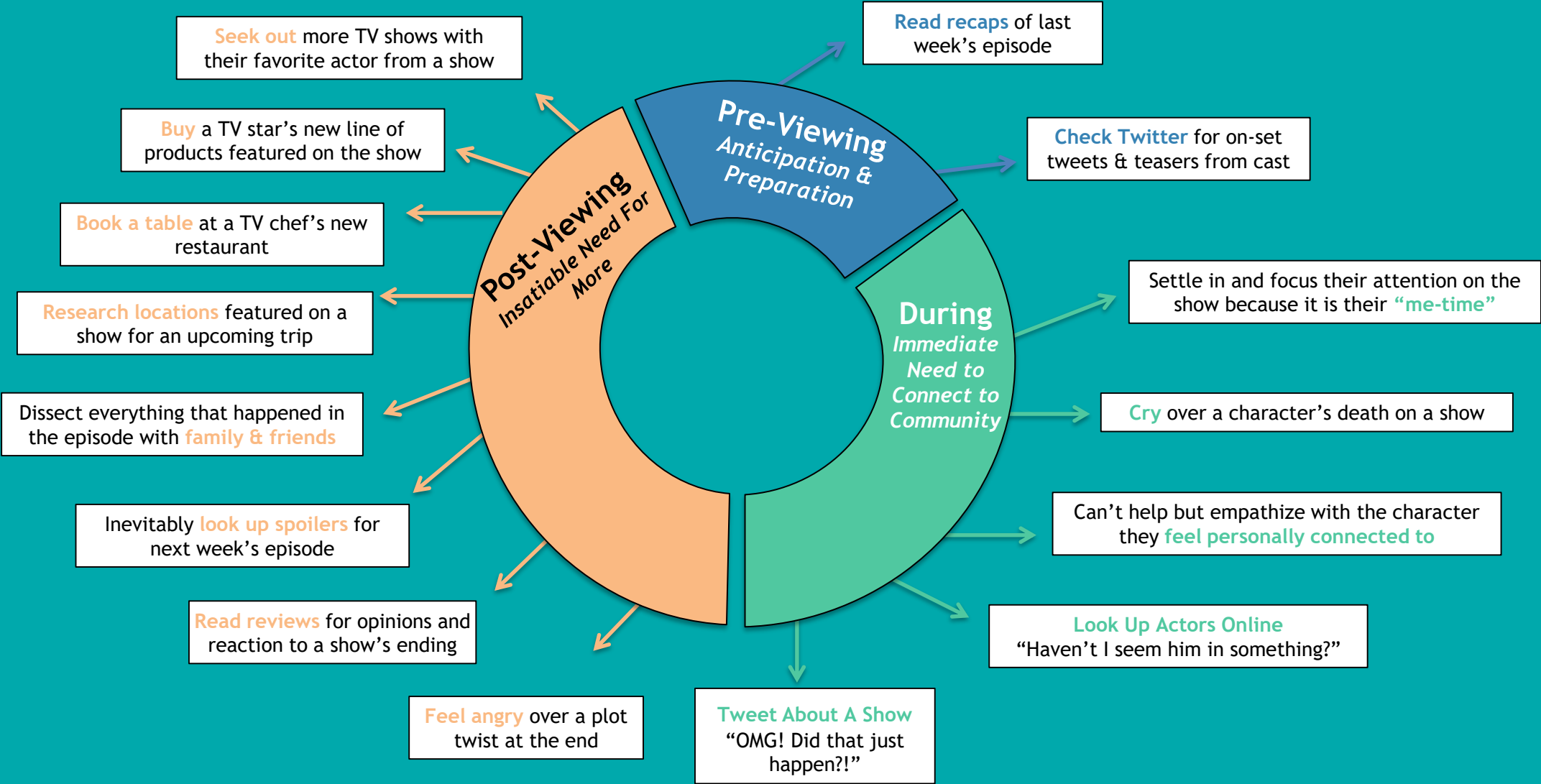


This high engagement leads to a *greater likelihood of purchasing products* that are featured on TV



The 360 Relationship Between Multicultural Viewers And Ad-Supported Television Programs

Multicultural Viewer Engagement With TV Content Goes Way Beyond Just The Time A Viewer Devotes To Watching A Program



Source: VAB / Research Now "Program Engagement" Survey, April 2018.

They Are Much More Likely To Be “Social Sharers” Who Are Actively Involved In Online Communities Centered Around TV Programs



■ Black
 ■ Hispanic
 ■ Non-Hispanic White

Source: VAB / Research Now “Program Engagement” Survey, April 2018. . Q9: Please indicate how often you do the following. Respondents Answer = Always/Frequently. African American/Black/Caribbean American = 160 Respondents, Hispanic = 188 Respondents, Non-Hispanic White = 744 Respondents, Total A18+ Respondents = 1,001.

Multicultural Viewers Have An Emotional Connection That Is Grounded In How Closely They Identify With Their Favorite TV Characters or Personalities



“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”

Black

46%

44%

31%

Hispanic

52%

44%

28%

Non-Hispanic White

51%

40%

22%

■ Black
 ■ Hispanic
 ■ Non-Hispanic White

Most Importantly, Their Purchasing Decisions Are More Significantly Influenced By Their Profound Connection To Ad-Supported TV Programming



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

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

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

43% / 36% / 36%

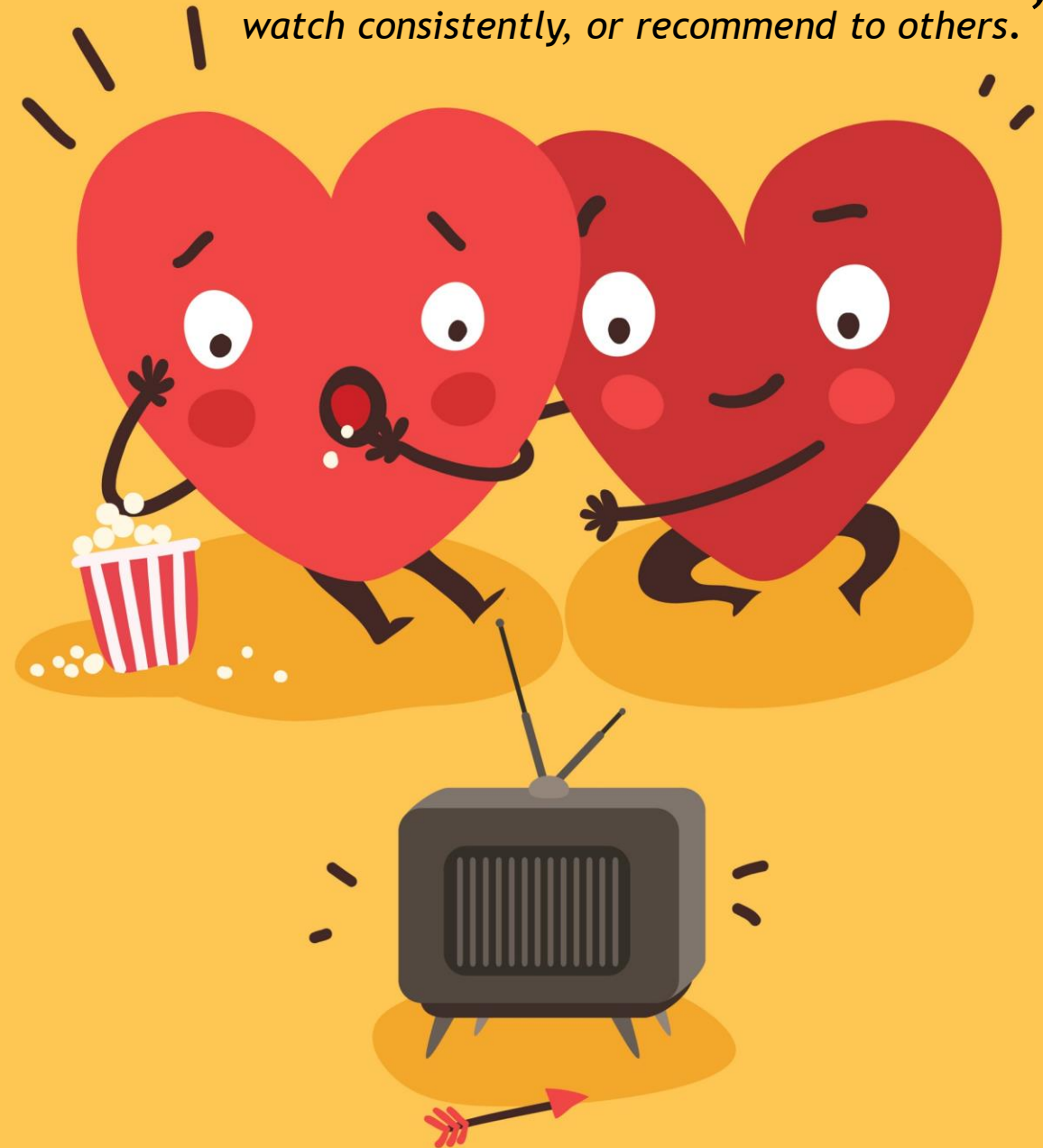
33% / 35% / 33%



■ Black ■ Hispanic ■ Non-Hispanic White

Source: VAB / Research Now “Program Engagement” Survey, April 2018. Q9: Please indicate how often you do the following? *Purchase a product I saw while watching a TV program (either a product I saw in an ad or in the actual program)*. Respondents Answer = Always/Frequently. Q10: Which of the following statements are true for you? Check any that apply. African American/Black/Caribbean American = 160 Respondents, Hispanic = 188 Respondents, Non-Hispanic White = 744 Respondents, Total A18+ Respondents = 1,001.

“Favorite Programs are programs you look forward to the most,
watch consistently, or recommend to others.”



The Relationship Between
Multicultural Viewers And
Ad-Supported TV Is Even
More Evident When It Comes
To Their *Favorite* Programs

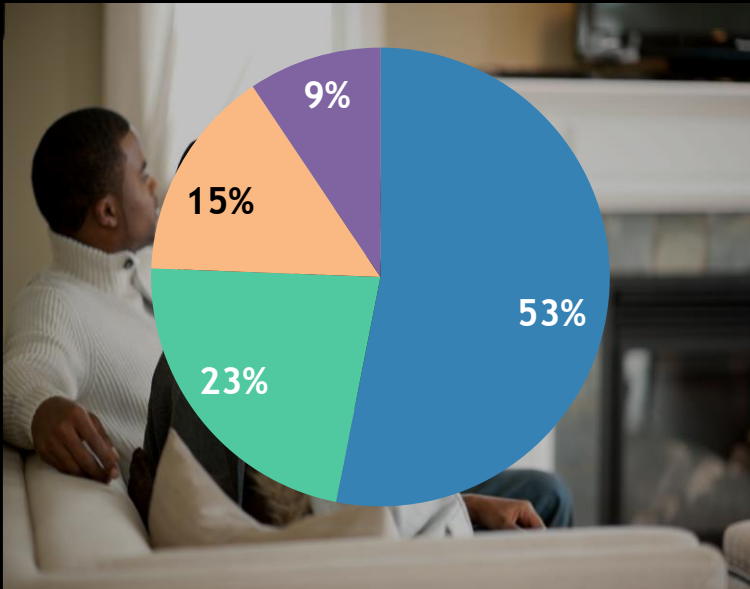
Multicultural Viewers Develop A Commitment To TV Programs In Much The Same Way They Do With Any Other Of Their Favorite Products

A viewer's path toward commitment to their favorite TV programming develops along similar stages as the consumer purchasing funnel.

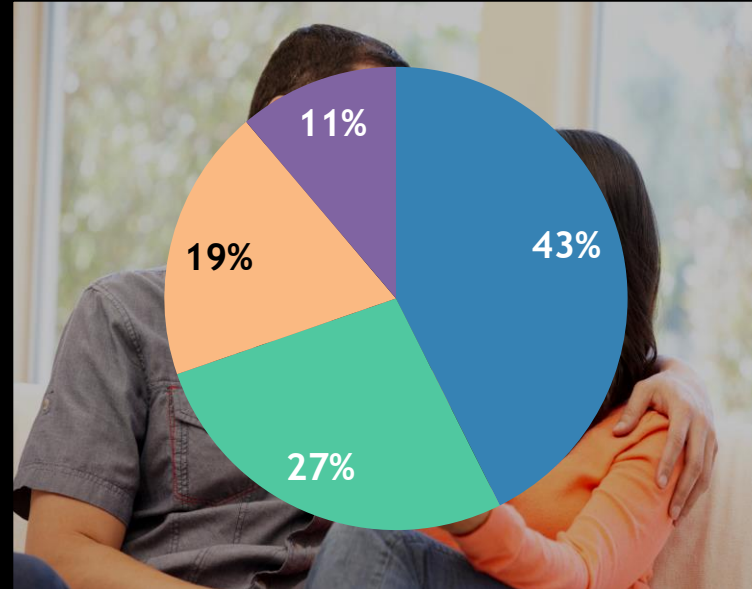


Multicultural Audiences Seek Out Conversation & Community With Other Viewers Which Is Why “Live” Viewing Is Still The Most Popular Way To Watch Their Favorite Programs

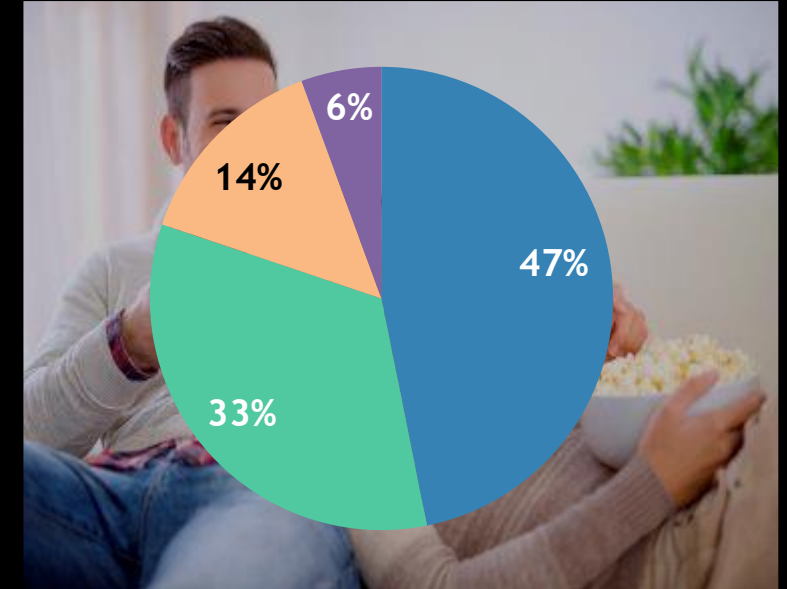
Black



Hispanic



Non-Hispanic Whites



- 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). African American/Black/Caribbean American = 160 Respondents, Hispanic = 188 Respondents, Non-Hispanic White = 744 Respondents, Total A18+ Respondents = 1,001.

Multicultural Viewers Are More Likely To Feel Attached To The Programs They Love Because They Are Deeply Invested In The Characters And Actors

Multicultural viewers are particularly moved by programs and characters that reflect them and their experiences.



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

40% / 38% / 32%

“I have read actor or cast news to learn more about what’s going on 'Behind The Scenes’”

43% / 38% / 34%

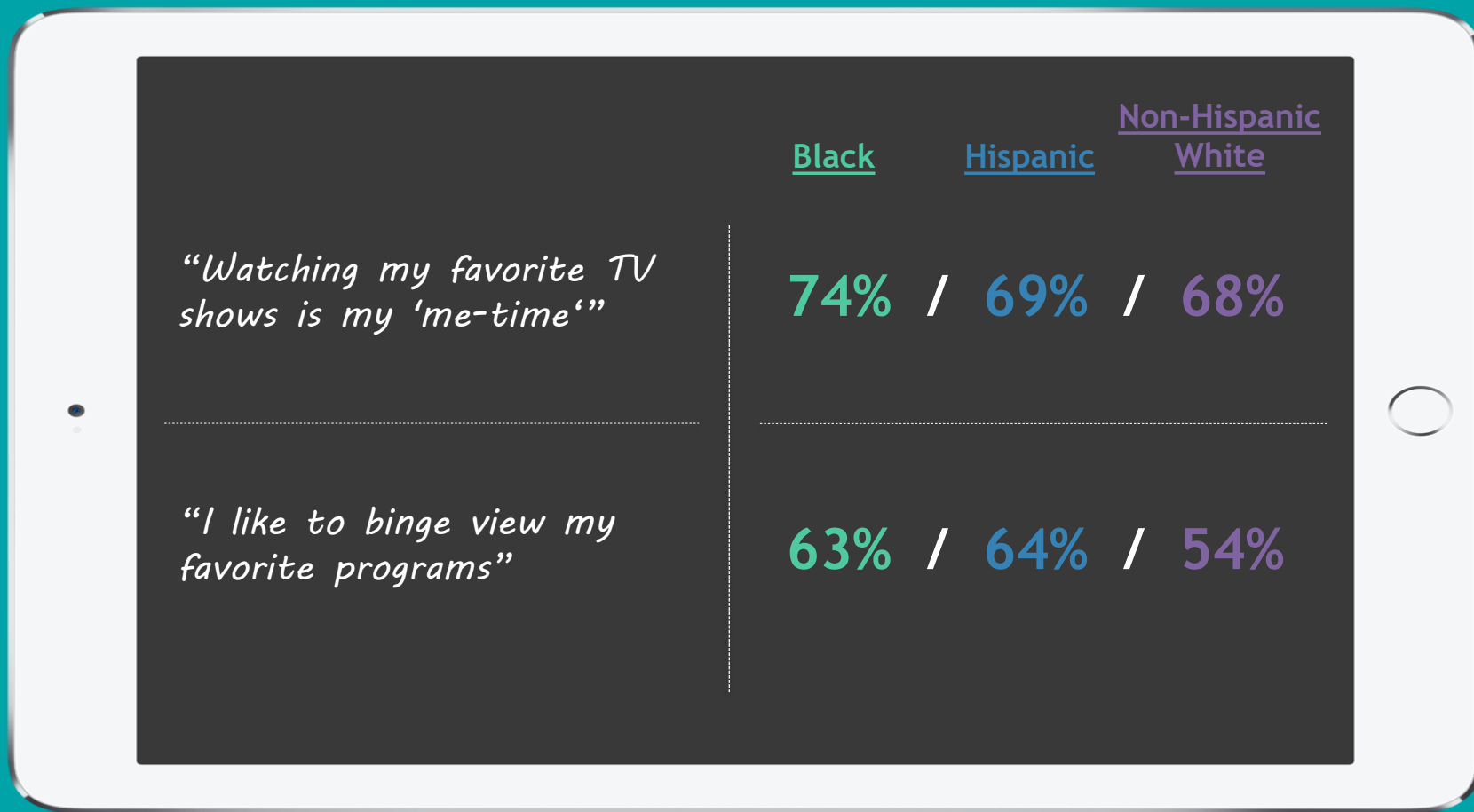
Black Hispanic Non-Hispanic White

Source: VAB / Research Now “Program Engagement” Survey, April 2018. Q14: Again, keeping your favorite TV programs in mind, which of the following statements do you believe are true for you? Check any that apply. African American/Black/Caribbean American = 160 Respondents, Hispanic = 188 Respondents, Non-Hispanic White = 744 Respondents, Total A18+ Respondents = 1,001.



“TV Time” Is “Me Time” As These Highly Engaged Multicultural Audiences Dedicate Their Attention To Their Favorite Shows

Multicultural viewers are highly selective and therefore prioritize their favorite programs, making sure to watch, or catch up on, every episode



■ Black ■ Hispanic ■ Non-Hispanic White

Source: VAB / Research Now “Program Engagement” Survey, April 2018. Q13: Please rate how much you agree or disagree with the following statements. % of Respondents who agree-Top 2 Box (net); Q15: Which of the following statements are true for you? Check any that apply; African American/Black/Caribbean American = 160 Respondents, Hispanic = 188 Respondents, Non-Hispanic White = 744 Respondents, Total A18+ Respondents = 1,001.



Multicultural Viewers Can't Get Enough Of Their Favorite Shows, Making Them Much More Likely To Seek Out Reviews, Recaps And Spoilers Online

This information often acts as “social currency” when discussing programs with family and friends.



“I read online recaps, blogs or reviews about the episode”



“I look for spoilers”

Black

41%

38%

Hispanic

39%

35%

Non-Hispanic White

26%

25%

■ Black ■ Hispanic ■ Non-Hispanic White

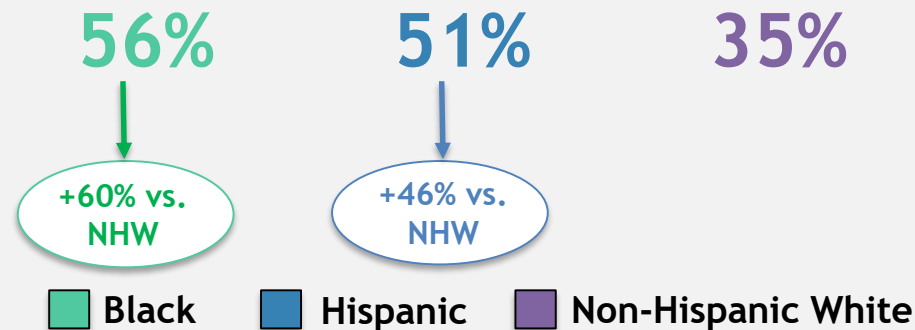
“% After Every or Most Episodes”

Motivated By This Deep Personal Connection To Their Favorite Programming, Multicultural Viewers Are Significantly More Likely To Share Their Opinions With Others

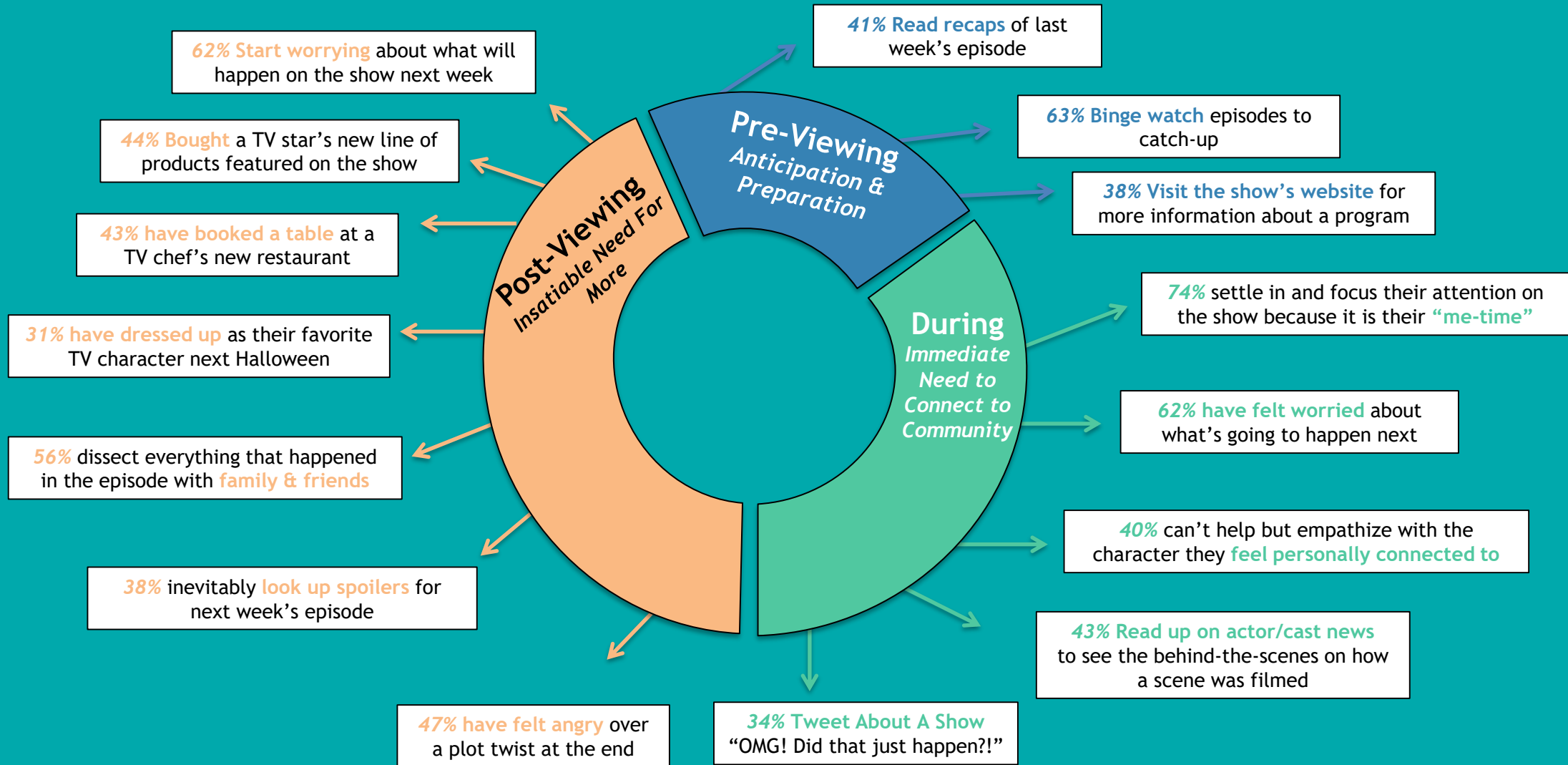


“I Discuss TV Programs With Friends, Family, Co-workers”

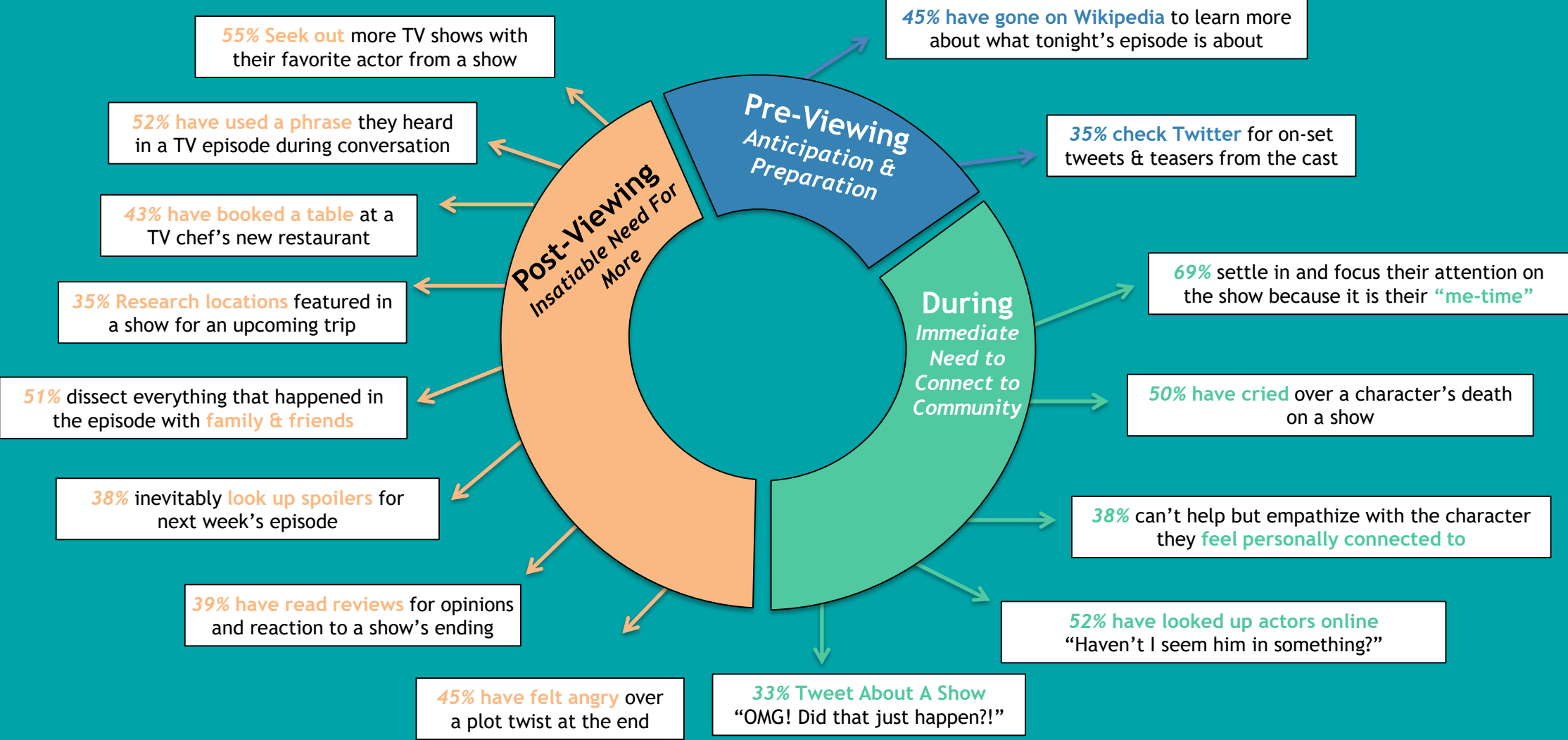
“% After Every or Most Episodes”



In Summary, Black Viewers Are A Highly Engaged Audience Who Have A 360 Relationship With TV Programming



The Same Goes For Hispanic Viewers Whose Intense Emotional Connection To TV Content Goes Well Beyond The Airing Of A Program



Source: VAB / Research Now "Program Engagement" Survey, April 2018; Hispanic = 188 Respondents, Total A18+ Respondents = 1,001.

It's clear that Multicultural viewers are highly engaged with TV programming. They feel emotionally attached to shows and characters and are moved to discuss and share with others.

But does the same behavior & “Emotional Stakes” exist for Original YouTube Content?



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



HolaSoyGerman.



Lele Pons



DudePerfect



KSI



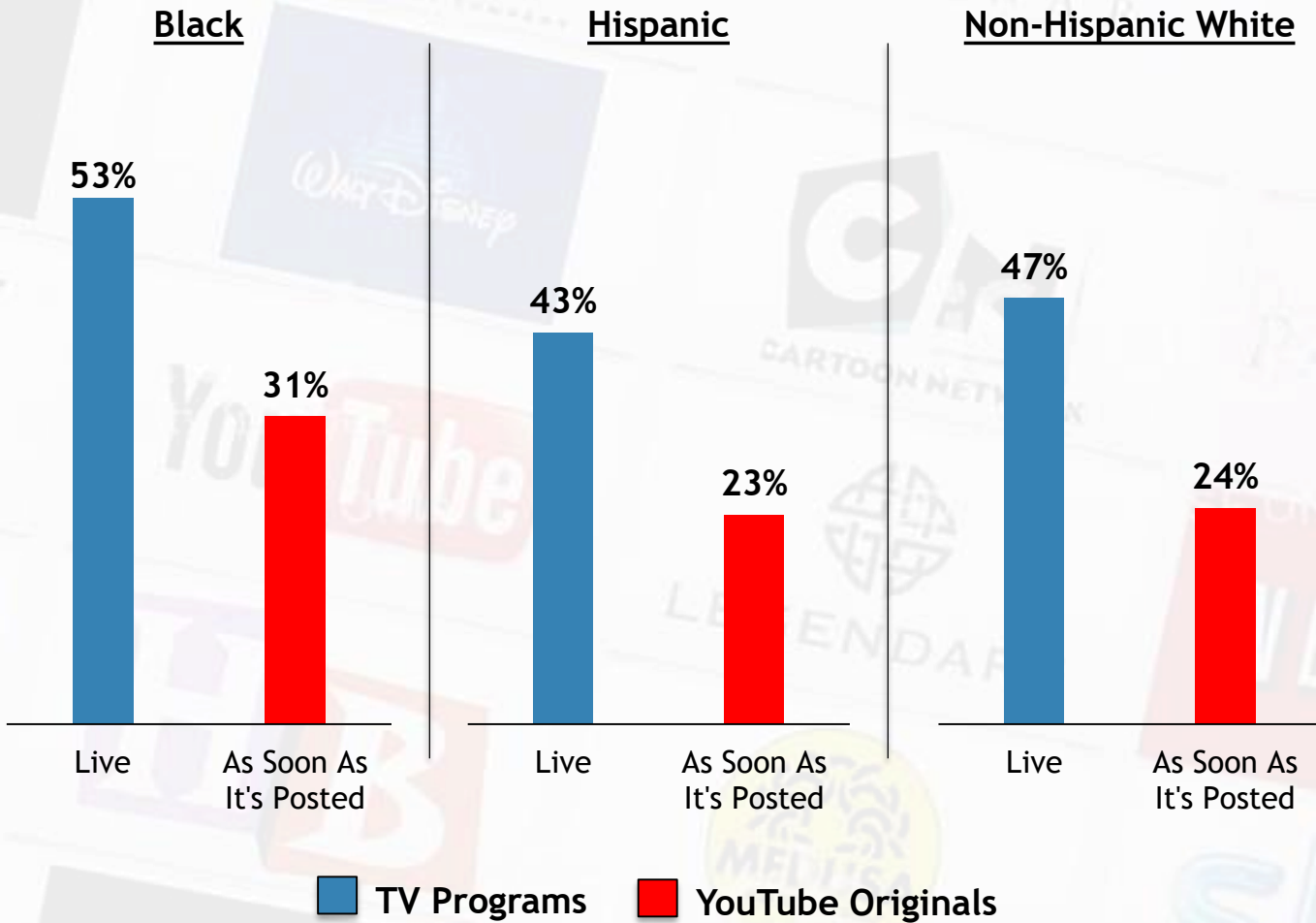
Felipe Neto

53% of Blacks and **56%** of Hispanics regularly watch original content on YouTube, compared to **33%** of Non-Hispanic Whites

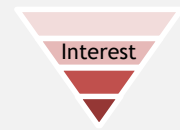
Source: VAB / Research Now “Program Engagement” Survey, April 2018. Q16b: Do you regularly (at least twice a month) watch original content on YouTube (i.e. Jake Paul, PewDiePie, Good Mythical Morning, Jenna Marbles, First We Feast, etc.)? African American/Black/Caribbean American = 160 Respondents, Hispanic = 188 Respondents, Non-Hispanic White = 744 Respondents, Total A18+ Respondents = 1,001.

When Do Multicultural Viewers Prefer To Watch Content? *Live TV vs. YouTube Content As Soon As It's Posted*

Multicultural viewers don't feel the same immediacy or sense of community around original YouTube videos as they do for TV



Source: VAB / Research Now "Program Engagement" Survey, April 2018. Q12: How do you prefer to watch your favorite TV programs? (Respondents: African American/Black/Caribbean American = 160, Hispanic = 188, Non-Hispanic White = 744); Q21: I watch new videos posted by my favorite YouTube Personality... (Respondents: African American/Black/Caribbean American = 84, Hispanic = 106, Non-Hispanic White = 245); Time-shifted YouTube viewing includes viewing as soon as it's posted, 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.



Culturally-Relevant Characters And Complex Storylines On TV Inspire Deeper Engagement Among Multicultural Viewers Than YouTube

Although Blacks and Hispanics are more likely to watch YouTube original content, they feel a deeper connection to TV programming than non-Hispanic Whites.

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



40% / 38% / 32%

VS.

“I feel personally connected to my favorite YouTube personality”



37% / 34% / 44%



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



53% / 55% / 55%

VS.

“I have watched other shows or movies because my favorite YouTube personality was in it”



46% / 40% / 49%

Black Hispanic Non-Hispanic White

Source: VAB / Research Now “Program Engagement” Survey, April 2018. TV: Q14: Again, keeping your favorite TV programs in mind, which of the following statements do you believe are true for you? (Respondents: African American/Black/Caribbean American = 84, Hispanic = 106, Non-Hispanic White = 245). YouTube: Q19: Again, keeping your favorite YouTube personalities in mind, which of the following statements do you believe are true for you? Check any that apply. (Respondents: African American/Black/Caribbean American = 84, Hispanic = 106, Non-Hispanic White = 245); Base = Those who regularly watch original content on YouTube.

This Connection With TV Characters & Personalities Leads Them To Feel More Emotionally Invested In TV Programs Than They Are In Original YouTube Content

Multicultural Respondents' Emotional Response to TV Programs and YouTube Original Content



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



73% / **76%** / **80%**

VS.

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



56% / **53%** / **65%**



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



62% / **56%** / **59%**

VS.

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



48% / **45%** / **40%**



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



43% / **50%** / **45%**

VS.

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



31% / **35%** / **33%**



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



47% / **45%** / **41%**

VS.

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



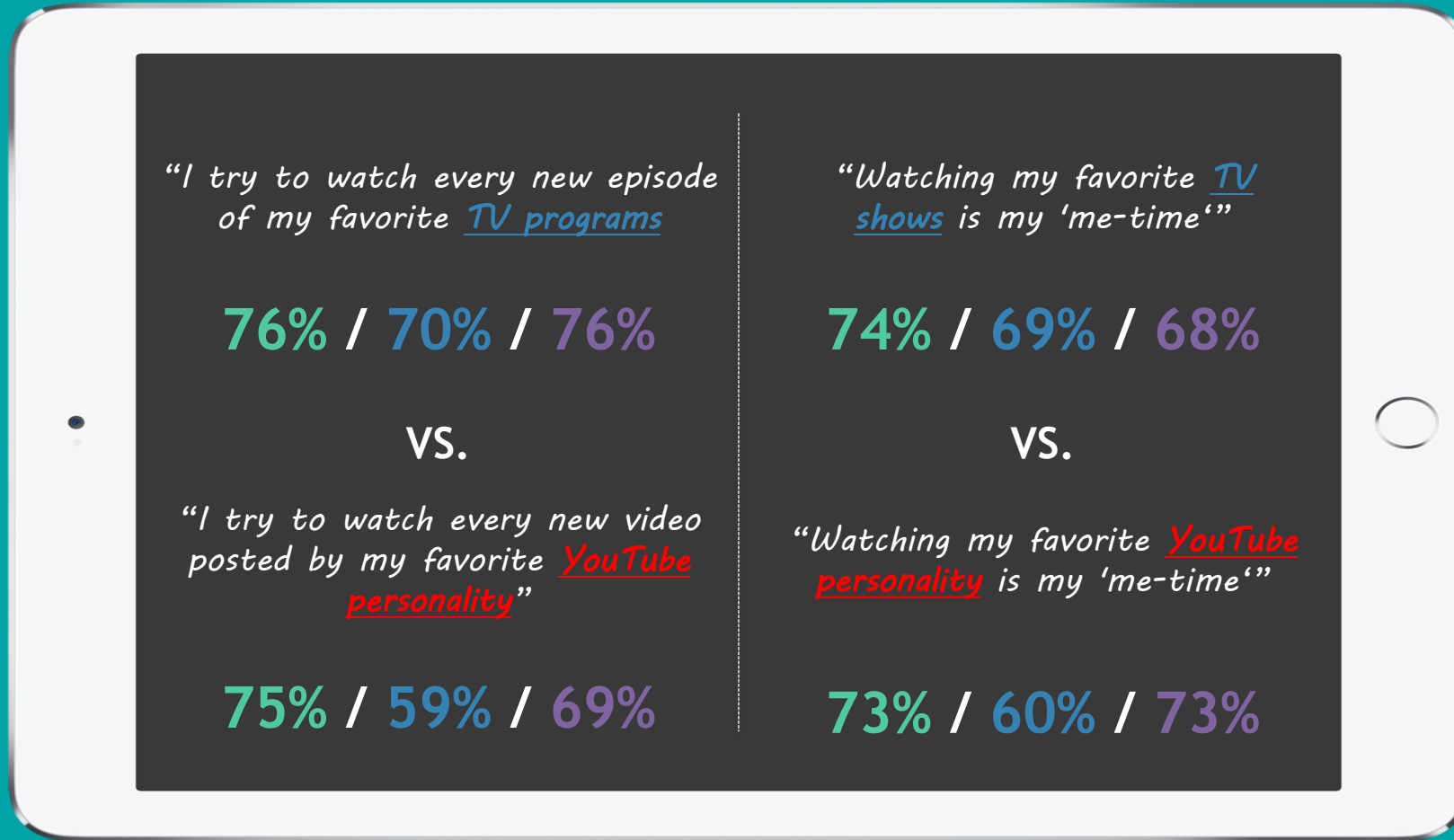
33% / **26%** / **33%**

■ Black ■ Hispanic ■ Non-Hispanic White

Source: VAB / Research Now “Program Engagement” Survey, April 2018. TV: Q8: Which of the following statements are true for you? (Respondents: African American/Black/Caribbean American = 160, Hispanic = 188, Non-Hispanic White = 744). YouTube: Q17: Which of the following statements are true for you? Check any that apply. (Respondents: African American/Black/Caribbean American = 84, Hispanic = 106, Non-Hispanic White = 245); Base = Those who regularly watch original content on YouTube.



Multicultural Viewers Show A Dedication To Long-Form TV Programming That's Stronger Than Their Commitment To Short, Snackable YouTube Content



■ Black ■ Hispanic ■ Non-Hispanic White

Source: VAB / Research Now "Program Engagement" Survey, April 2018. TV-Q13: Please rate how much you agree or disagree with the following statements (Respondents: African American/Black/Caribbean American = 160, Hispanic = 188, Non-Hispanic White = 744). YouTube- Q18: Please rate how much you agree or disagree with the following statements. (Respondents: African American/Black/Caribbean American = 84, Hispanic = 106, Non-Hispanic White = 245); Base = Those who regularly watch original content on YouTube. % of Respondents who agree-Top 2 Box (net).

Above All, Given Their Greater Personal Investment In Television Content, TV Programming Is More Likely Than YouTube Original Content To Inspire Purchase



Blacks are 19% more likely and Hispanics are 9% more likely to purchase a product that's been featured on TV than they are a product featured by their favorite YouTube personality



Have purchased a product that has been shown / featured on a TV show

44%

37%

39%



Have purchased a product that their favorite YouTube personality has shown / featured during a video

37%

34%

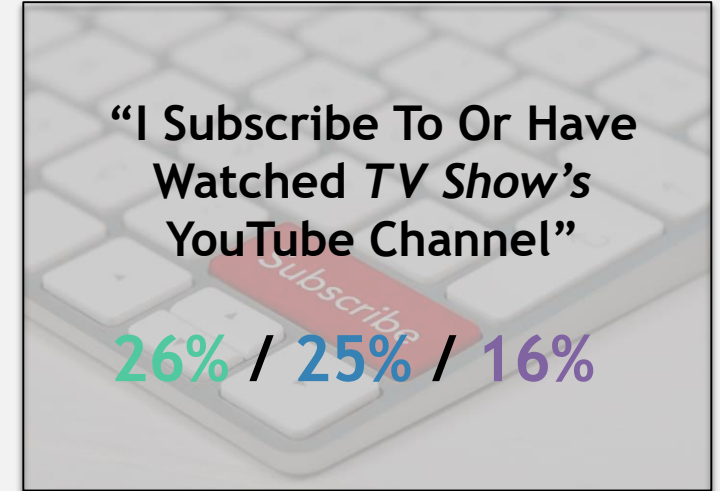
38%

Black Hispanic Non-Hispanic White

Interestingly, YouTube Itself Helps Feed Multicultural Viewers' Voracious Appetite For TV With Supplementary Content Through Its Own Platform



Multicultural viewers actively engage with TV content on YouTube



Black Hispanic Non-Hispanic White

Source: VAB / Research Now “Program Engagement” Survey, April 2018. Q9: Please indicate how often you do the following. Respondents Answer = Always/Frequently. Q15: Which of the following statements are true for you? Check any that apply (Respondents: African American/Black/Caribbean American = 160, Hispanic = 188, Non-Hispanic White = 744).

Decidedly Different: A Summary Of How Multicultural Viewers Differ From Non-Hispanic Whites In Their Commitment To TV And YouTube

Index vs. Non-Hispanic Whites



Passionately-Engaged Viewers

	<u>Black</u>	<u>Hispanic</u>
"I Have Gotten Upset About A Plot Twist On A Program"	115	110
"Watching My Favorite TV Show Is My 'Me-time'"	109	102
"I Feel Personally Connected To The Characters Of My Favorite TV Programs"	125	119
"I Feel Personally Connected To My Favorite YouTube Personality"	84	77
"I Have Laughed Out Loud Because Of Something That A YouTube Personality Did"	86	82



Social Sharers

	<u>Black</u>	<u>Hispanic</u>
Share, Post Or Tweet Video Clips / Content About A TV Program	164	159
Tweet About Or Read A Tweet About a TV Program	162	157
Discuss TV Programs With Friends, Family And Co-workers	160	146
Watch Video Clips From TV Shows On YouTube	149	123
Read Or Post Comments About TV Content On YouTube	117	109



Knowledge-Seekers

	<u>Black</u>	<u>Hispanic</u>
"I Read Online Recaps, Blogs Or Reviews About The Episode"	158	150
"I Look For Spoilers"	152	140



Inspired To Purchase

	<u>Black</u>	<u>Hispanic</u>
Have Purchased A Product I Saw While Watching A TV Program (either a TV ad or in the actual program)	182	150
Have Eaten At A Restaurant Because It, Or Its Chef / Owner, Was Featured On A TV Show	119	100



Parting Thoughts

Multicultural viewers exhibit a profound attachment to TV programming, characters and personalities, particularly when the actors and storylines are culturally relevant.

Motivated by their emotions, Multicultural viewers have a more intense need to share their thoughts & feelings with not only friends and family but also social media and online communities.

They are more likely to dedicate their “me time” to their favorite TV shows so it gets their full attention and they are more emotionally invested in TV than they are in YouTube original content.

Ultimately, their passion for TV inspires a +82% greater likelihood of a product purchase among Black viewers and +50% greater likelihood among Hispanic viewers vs. Non-Hispanic White viewers.

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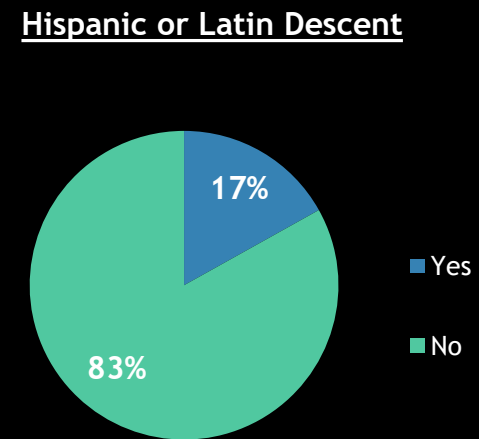
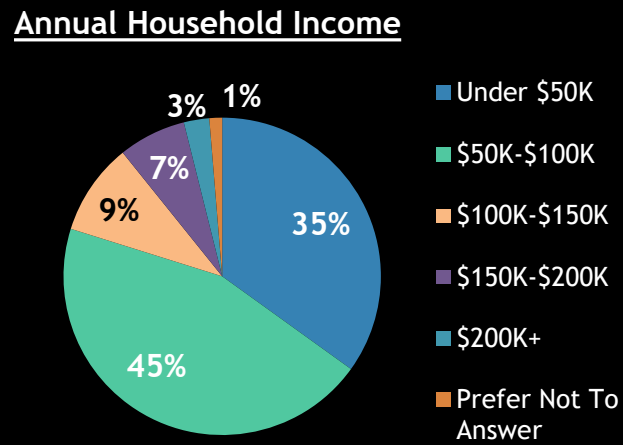
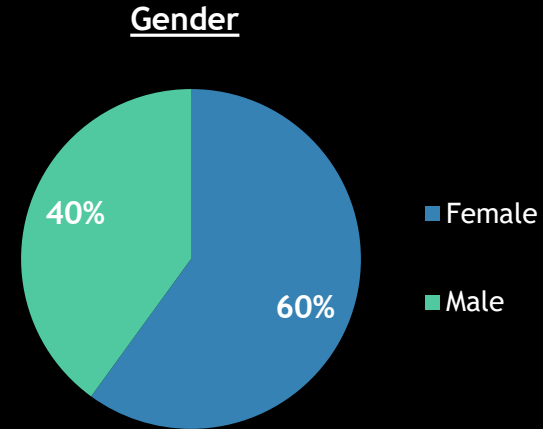
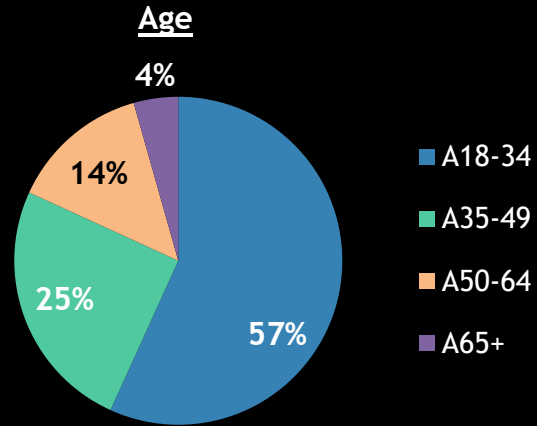


[@VideoAdBureau](https://twitter.com/VideoAdBureau)



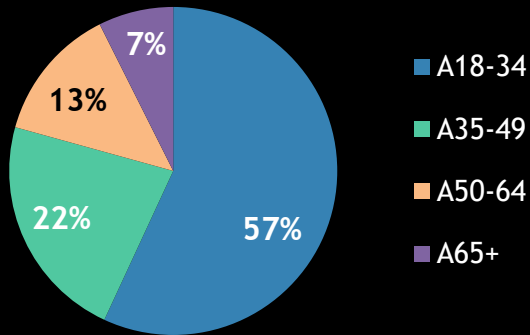
APPENDIX

Black Survey Respondents: Demographic Profile

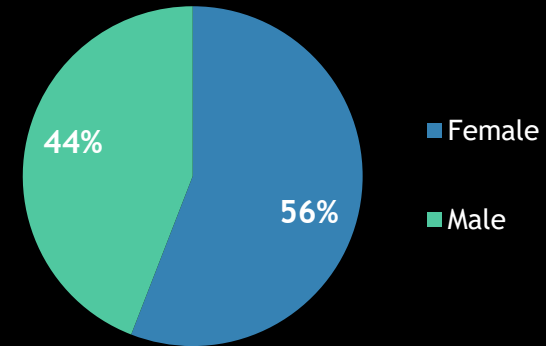


Hispanic Survey Respondents: Demographic Profile

Age



Gender



Annual Household Income

