

VIDEO ADVERTISING BUREAU - REPORT 2019

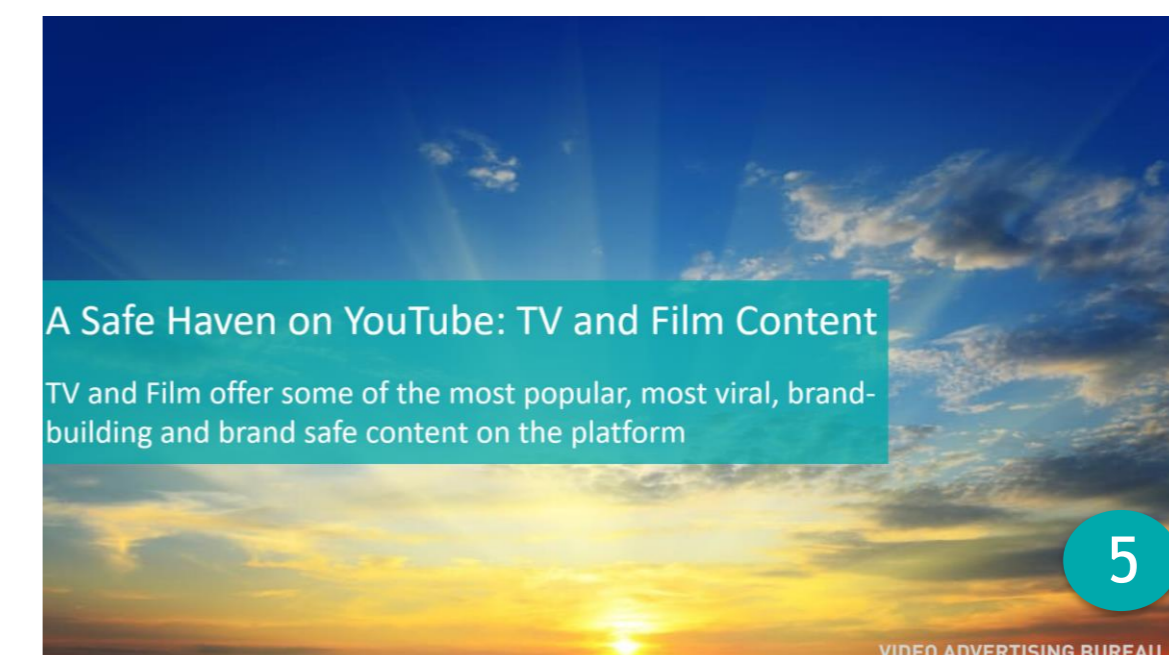
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Risky Business

Exploring Brand Safety on YouTube

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- 3 Why a Brand Safe Environment Matters
- 4 Why is Ensuring Brand Safety Such a Challenge on YouTube?
- 5 A Safe Haven on YouTube: TV and Film Content
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Risk Management

With transparency one of Advertising's most important issues, marketers demand their messaging appear within a brand-safe environment where they can exert control over their placements. However amidst all the talk about transparency and brand safety, many marketers continue to allow their ads to run on digital platforms that constantly put their brands in questionable environments. On many platforms, brand safety is a given, yet YouTube struggles to fix its issues despite the importance of creating brand-safe environments for their valued partners.

YouTube has been under continued scrutiny for allowing a host of inappropriate videos to live on its platform as many marketers object to their advertisements appearing adjacent to this unsavory content. YouTube has made repeated efforts at ensuring a more brand-safe environment, however with 400 hours of video uploaded every minute, it is certainly a daunting task to regulate, monitor and control all content.

In response to this heightened scrutiny of content, many advertisers have pared down their list of acceptable YouTube channels considerably... some going from millions down to a few thousand. But is that enough? **Is the risk and lack of transparency worth the potential reward** when you consider that 37% of consumers change how they think of brands that run alongside offensive content and YouTube videos with lower brand safety experience 51% *less* consumer engagement?

YouTube is certainly a viable platform, but content and context matter. Marketers must be vigilant about protecting their brand. Most, if not all, other media platforms guarantee brand safety as advertiser control over placements is standard operating procedure. We therefore explored how realistic it is that YouTube will be able to guarantee brand safety in the short-term. To answer this, we took a deep-dive into the following questions:

Why is ensuring brand safety such a challenge on YouTube?

Where do these threats to brand safety exist?

What are the implications for brands?

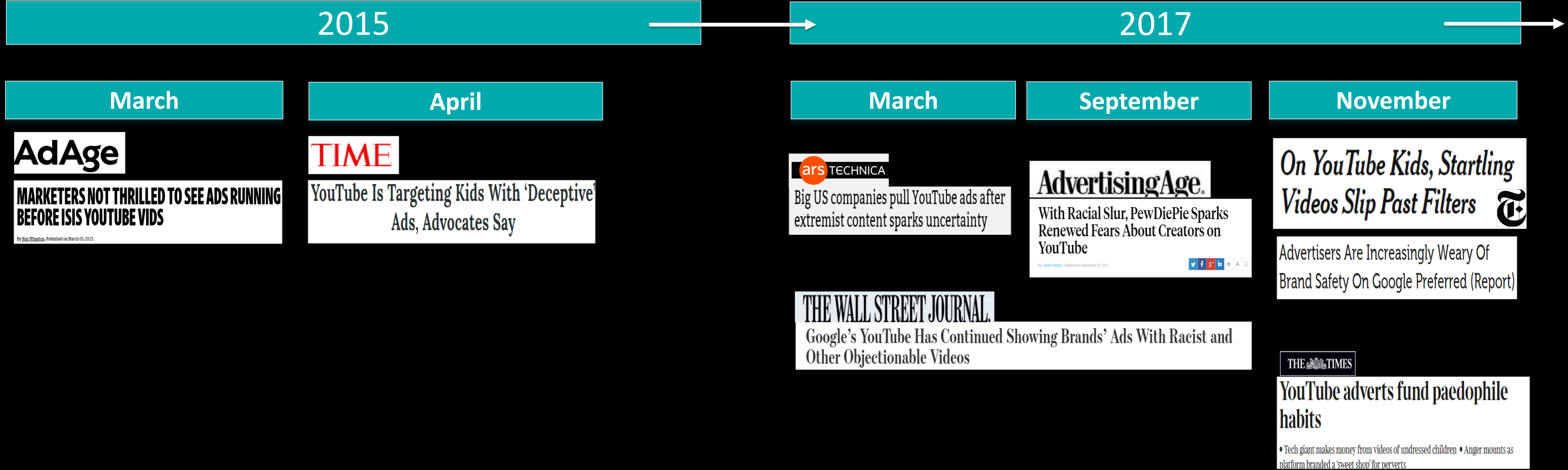
Are there opportunities on YouTube to advertise within premium, brand safe content at scale?



YouTube's History With Brand Safety Issues

Brand Safety Issues On YouTube Began Years Ago...

Ads ran within objectionable content such as divisive, violent, pornographic or extremist videos



...And Persisted Through 2018

Several months featured a publicized major breach in brand safety

2018

January

LOGAN PAUL: YOUTUBE STAR EXPLAINS WHY HE UPLOADED CONTROVERSIAL 'SUICIDE FOREST' VIDEO



YouTube Has Stripped Logan Paul Of All Advertising Following A New Controversy

February

Daily Mail

YouTube Kids app is STILL showing disturbing videos, including footage on how to sharpen knives and children's cartoon Paw Patrol on a burning plane

April

CNN tech

Exclusive: YouTube ran ads from hundreds of brands on extremist channels

June

YouTube showed ads of a demon clawing at a woman's throat before videos of 'Frozen'

BUSINESS INSIDER



ADWEEK

YouTube is Running Ads for Major Brands on Fake Medical News Videos

July

Daily Mail

YouTube is still failing to take down jihadi propaganda: Video sharing site missing its target on removing IS films in one in four cases, study finds

...And Continue Today

2019

February

The New York Times

*Advertisers Boycott YouTube
After Pedophiles Swarm
Comments on Videos of Children*

 CNBC

Nestle and others have
suspended YouTube ads over
news of a pedophile network on
the site

Further Contributing To A Toxic Environment Are Inappropriate, Offensive And Lewd User Comments

FINANCIAL TIMES

Advertisers quit YouTube over video comments

Complaints that sexualised remarks had been left alongside content featuring children

 **HELLO GIGGLES**

Has YouTube culture become dangerously toxic?

GIZMODO

Companies Halt YouTube Ads Following Reports of Commenter Pedophile Network

 **Polygon**

Can YouTube fix its comment section?

It's been trying for close to a decade

NewStatesman

Why are YouTube comments the worst on the internet?

engadget

Companies pull ads from YouTube over comments in child videos

“*YouTube’s comment section is one of the internet’s most infamous cesspools, much to the company’s chagrin.*

- Polygon



Why A Brand Safe Environment Matters

Most Consumers Are Disturbed By Inappropriate Videos And Disengage

A recent independent study analyzed 425 videos produced by the top YouTube channels for their level of brand safety. “Unsafe” content included themes/images like weapons, drugs, violence, scandals, profanity, negativity or hate speech.

The videos that had lower brand safety scores (based upon their increased incidence of the themes above) experienced far less engagement than those which were brand-suitable (had fewer instances of inappropriate content).

Viewer Engagement with YouTube Videos

Videos offering higher vs. lower brand safety

Videos with **high** brand safety scores

Videos with **low** brand safety scores

+38%

Views Per Video

-26%

+73%

Engagements Per Video

-51%

(+/- are vs. the average YT video in the study)

Engagement thrives in brand-safe environments as audiences are more responsive and have greater opportunities to view (for instance, people shy away from viewing “NSFW” videos at work or in public places).

Provocative content may be thought of as more likely to spark conversation and interaction but, in reality, viewers often turn their attention away from these videos

DELMONDO + URU

Source: Delmondo + Uru “The Top YouTube Stars Ranked by Brand Safety”, March 2018; analysis included the top 25 most recent videos from each of the top 17 YT influencers as per SocialBlade global ranking (by subscribers) disregarding mainstream music artists. “Unsafe/Unsuitable” content defined as content showcasing unsafe objects and themes such as weapons, drugs, terrorism, and celebrity scandals; unsafe language, such as profanities, misogyny, and hate speech; paid or sponsored content, negative sentiment; not safe for work content such as nudity and extreme violence. “NSFW” = Not Safe For Work

This Distaste For Objectionable Content Has Real Implications For Brands

36% of consumers think an ad is an endorsement by the brand



20% of consumers will boycott, be vocal, or raise issues about brands that run adjacent to offensive content



37% of consumers change how they think of brands that run alongside offensive content when making a decision to buy



Acknowledging The Need For Greater Brand Safety, YouTube Has Reportedly Made Several Major Attempts At Fixing The Platform, Yet Issues Persist

March 2015

AdAge
MARKETERS NOT THRILLED TO SEE ADS RUNNING BEFORE ISIS YOUTUBE VIDS

By Ken Wheaton. Published on March 05, 2015.

April 2015

TIME
 YouTube Is Targeting Kids With 'Deceptive' Ads, Advocates Say

March 2017

ars TECHNICA
 Big US companies pull YouTube ads after extremist content sparks uncertainty

April 2017

YT Partner Program Requirement: Channel must have 10,000 lifetime views

Sept 2017

AdvertisingAge.
 With Racial Slur, PewDiePie Sparks Renewed Fears About Creators on YouTube

Nov 2017

THE NEW YORK TIMES
 YouTube adverts fund paedophile habits
On YouTube Kids, Startling Videos Slip Past Filters

January 2018

YT Partner Program Requirements:
 - Channel must have 4,000 hrs of watch time over the last 12 months + a minimum of 1,000 subscribers
 - Increased human review of videos

LOGAN PAUL: YOUTUBE STAR EXPLAINS WHY HE UPLOADED CONTROVERSIAL 'SUICIDE FOREST' VIDEO



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ADWEEK
YouTube is Running Ads for Major Brands on Fake Medical News Videos
 Objectionable content still slipping through site's safeguards

July 2018

Daily Mail
 YouTube is still failing to take down jihadi propaganda: Video sharing site missing its target on removing IS films in one in four cases, study finds

February 2019

The New York Times
Advertisers Boycott YouTube After Pedophiles Swarm Comments on Videos of Children

CNBC
 Nestle and others have suspended YouTube ads over news of a pedophile network on the site

Similarly, YouTube Has Repeatedly Struggled To Fix The Comments Section

Offensive comments are rife, despite numerous reported attempts at eliminating them

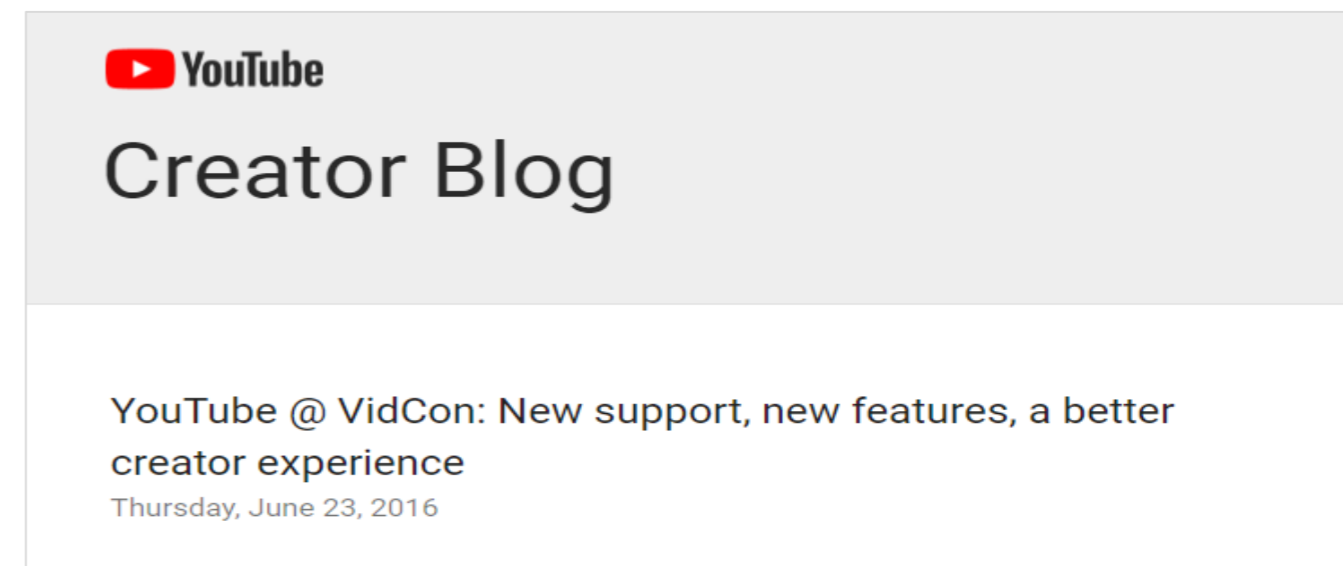
2013: Enabled comments to be powered by Google Plus



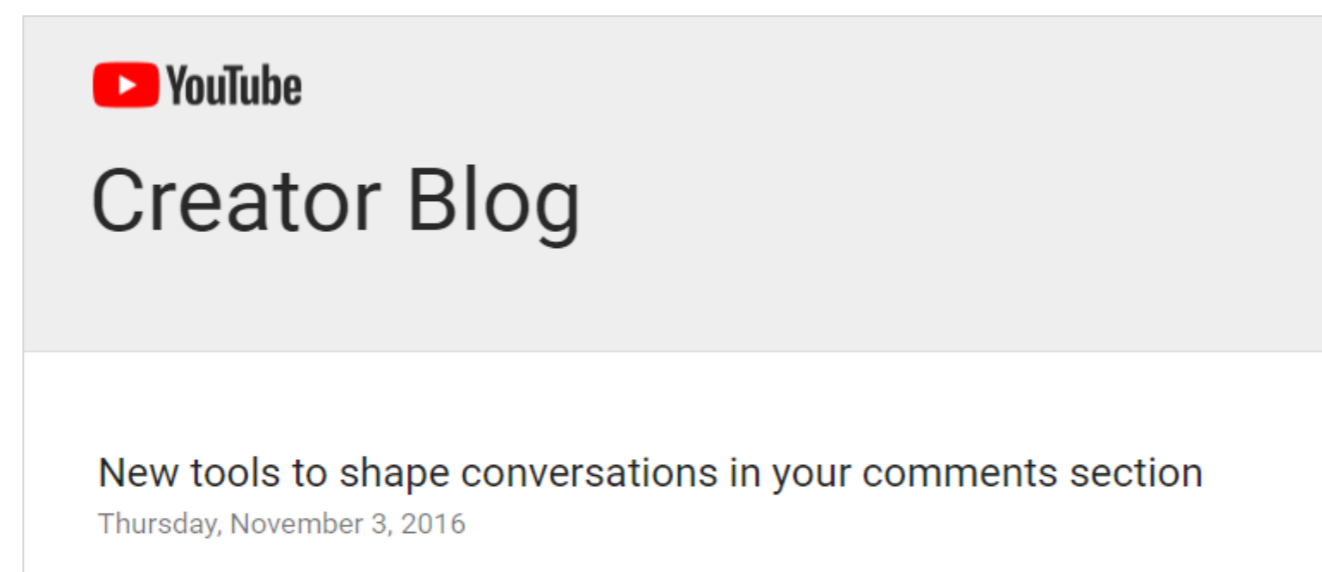
2015: Employed a Ranking System



2016 (June): Enabled creators to delegate moderation



2016 (November): Provided Creators with a Moderation Tool



2017: Disabled Comments

BuzzFeedNEWS

YouTube Is Disabling Predatory Comments — But Leaving Up The Predators' Accounts

But Without A Proactive Solution At The Point Of Upload, Can Brand Safety Ever Be Truly Assured?

As 400 hours of video are uploaded to its platform every minute, it may just be too cumbersome at this point for YouTube to control the influx of content and comments and to guarantee a brand-safe environment to advertisers



How YouTube censors explicit content

*“The way we manage our platform...we have **community guidelines**, content we do not want to have on the platform...And the way we manage it is we have a system that by which **users flag that content** and so if you ever see a video that is inappropriate, that gets flagged, it gets **put into a queue**, it gets **reviewed by a human**, and that human says “does this meet our guidelines or not?” and if not, that video gets pulled down. And that’s essentially how we manage the platform.”*

- Susan Wojcicki, CEO YouTube



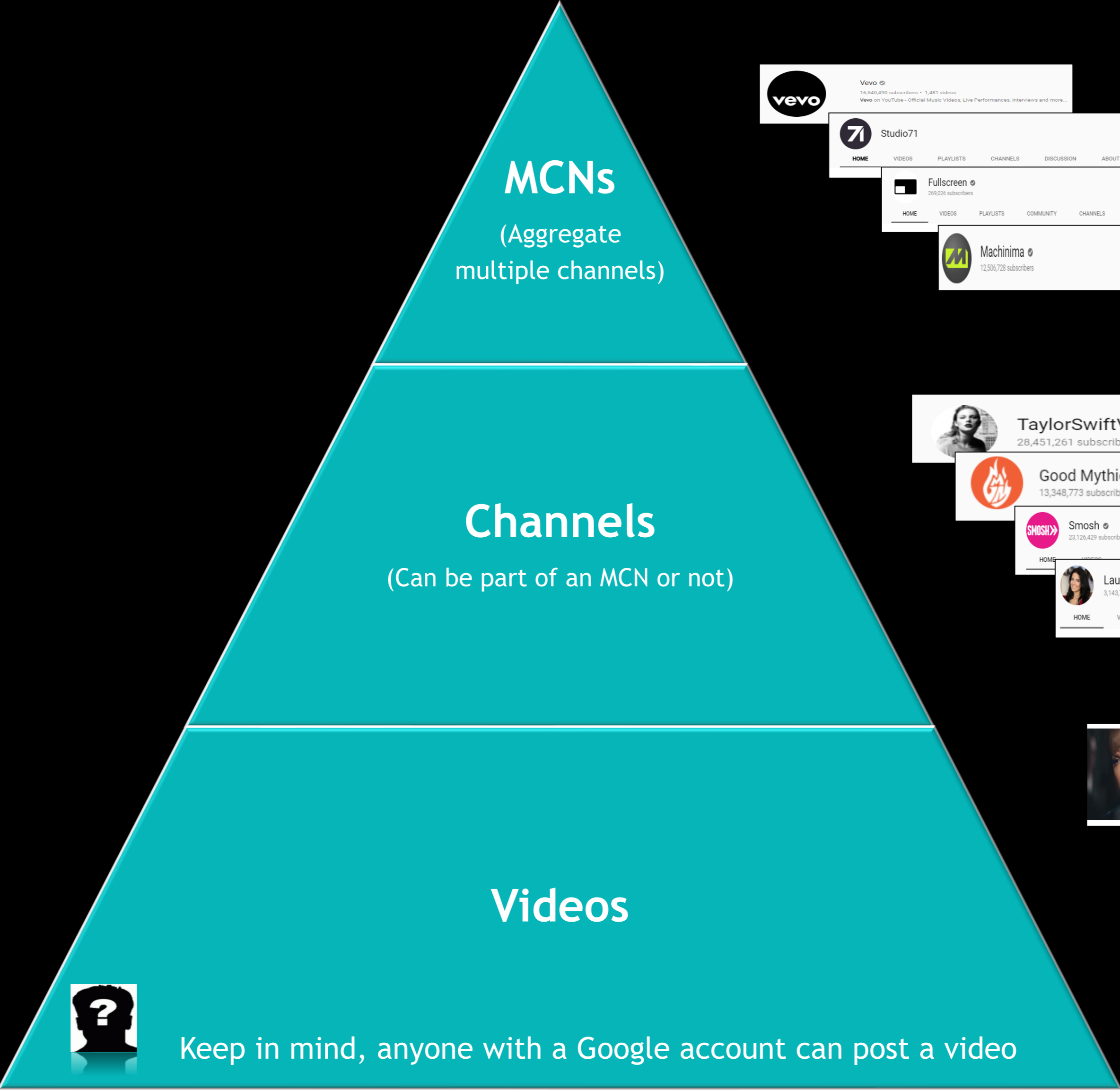
Why Is Ensuring Brand Safety Such A Challenge On YouTube?

A large part of the issue is rooted in the way the platform is structured and the sheer volume of content it hosts

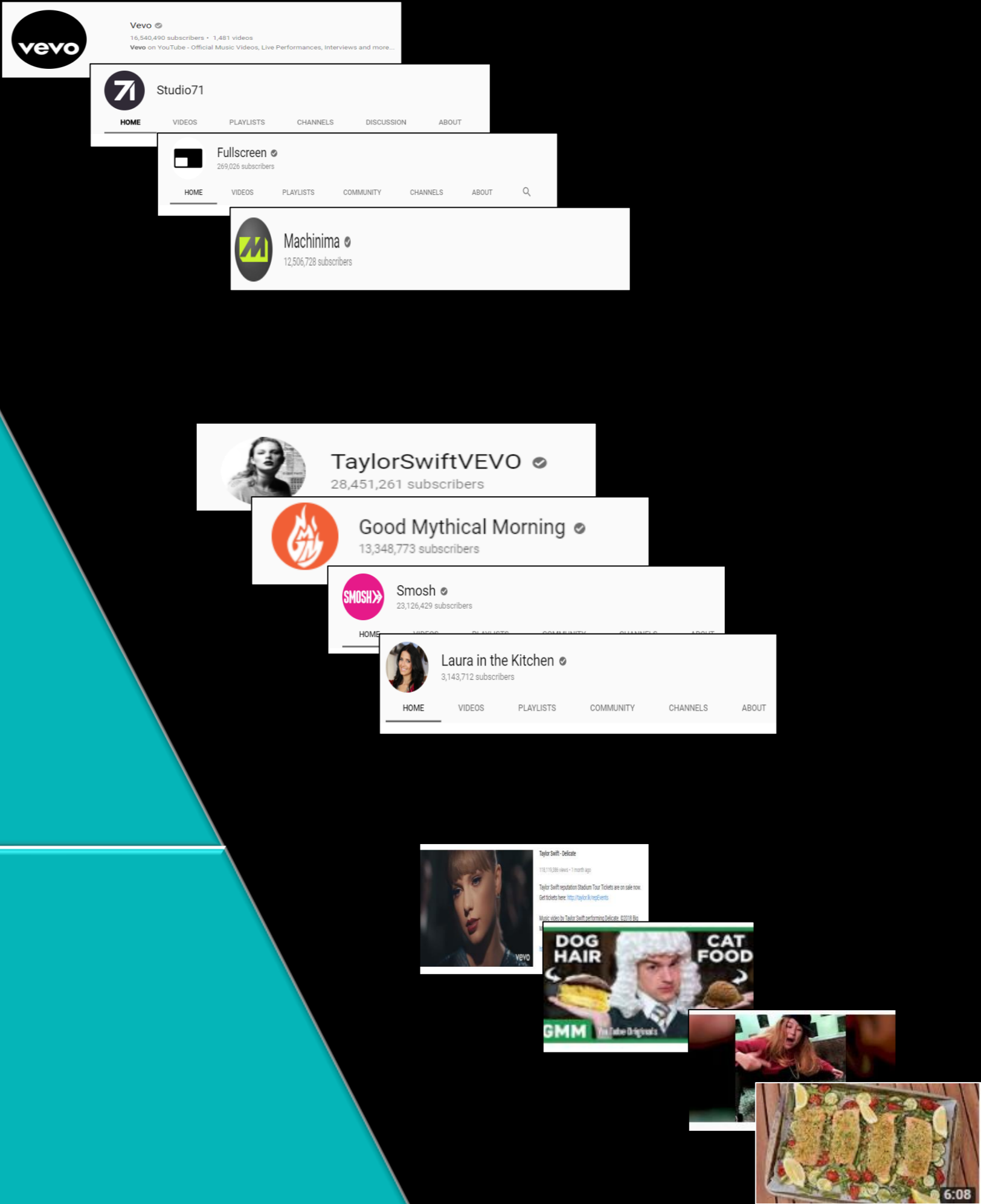
But this volume is necessary to create the platform scale that marketers are looking for in their campaigns



The YouTube Content Structure Includes Multi-Channel Networks (MCNs), Channels, and Videos

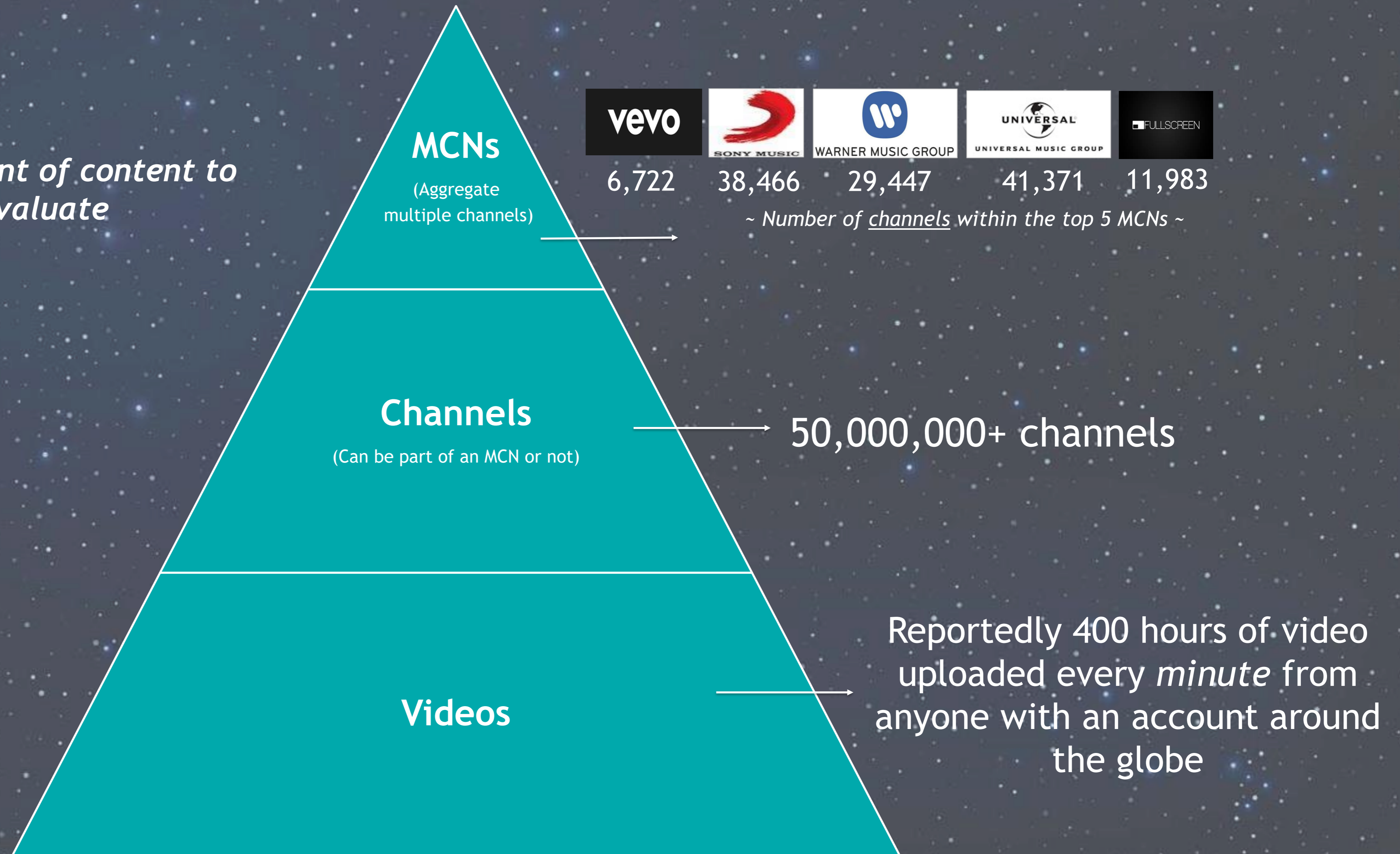


examples



The Ever-Increasing Amount Of Content To Review And Monitor Is Staggering

This is a massive amount of content to continuously evaluate



Additionally, Out Of 50 Million Channels, Only .04% Of YouTube MCNs/Channels Are comScore Measured

Accurate measurement of the 50+ Million channels on YouTube is a daunting, if not impossible, task and only 17,398 properties are measured in the comScore YouTube Partners Report

The other properties are seemingly so insignificant audience-wise that they are not even measured

Even Within The .04% Universe Of Measured Channels, The Results Show An Extremely Long Tail Of Tiny Properties

In our custom analysis, the measured YouTube properties (a combination of MCNs + Channels) were segmented into 5 quintiles. These properties were ranked on Time Spent from most to least, and broken into quintiles

The *most viewed* properties, which collectively represent the top 20% of total time spent on YouTube, fall into Quintile 1, while the *least viewed* properties, which collectively represent the bottom 20%, fall into Quintile 5

YouTube Quintile Analysis (Time Spent)
Measured Properties

	Quintile 1 <small>(the most viewed properties, collectively representing the <u>top 20%</u> of total time spent on YouTube)</small>	Quintile 2	Quintile 3	Quintile 4	Quintile 5 <small>(the least viewed properties, collectively representing the <u>bottom 20%</u> of total time spent on YouTube)</small>
# of Properties	4	14	113	629	16,658
% of Properties	<1%	<1%	<1%	4%	95%

Source: VAB analysis of comScore YouTube Partners Report - total measured properties, 17,398, Video Metrix Multi-Platform, Feb 2018, Total Audience; The number of total channels is based upon the unexpanded view of the Partners Report, with channels rolled-up in to their MCNs. This is done in order to avoid double counting channels that are already included within their MCNs; 'Properties' defined as MCN or Channel.

Nearly Half Of The Measured Time Viewers Spend With YouTube Is With These Extremely Long Tail Properties

99% of all YouTube measured properties are long-tail (quintile 4/5) channels

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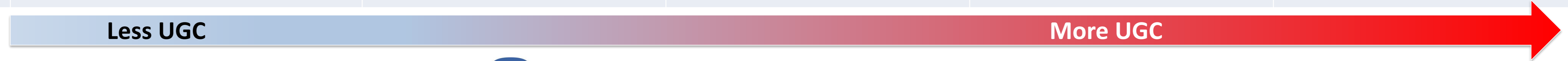
...plus **Millions** of additional channels seemingly so insignificant that they aren't measured

Source: VAB analysis of comScore YouTube Partners Report - total measured properties, 17,398, Video Metrix Multi-Platform, Feb 2018, Total Audience; The number of total channels is based upon the unexpanded view of the Partners Report, with channels rolled-up in to their MCNs. This is done in order to avoid double counting channels that are already included within their MCNs; 'Properties' defined as MCN or Channel.

The Issue Is That These Long-Tail Channels Are Highly Likely To Be User Generated Content And Therefore Can Potentially Present Brand Safety Concerns

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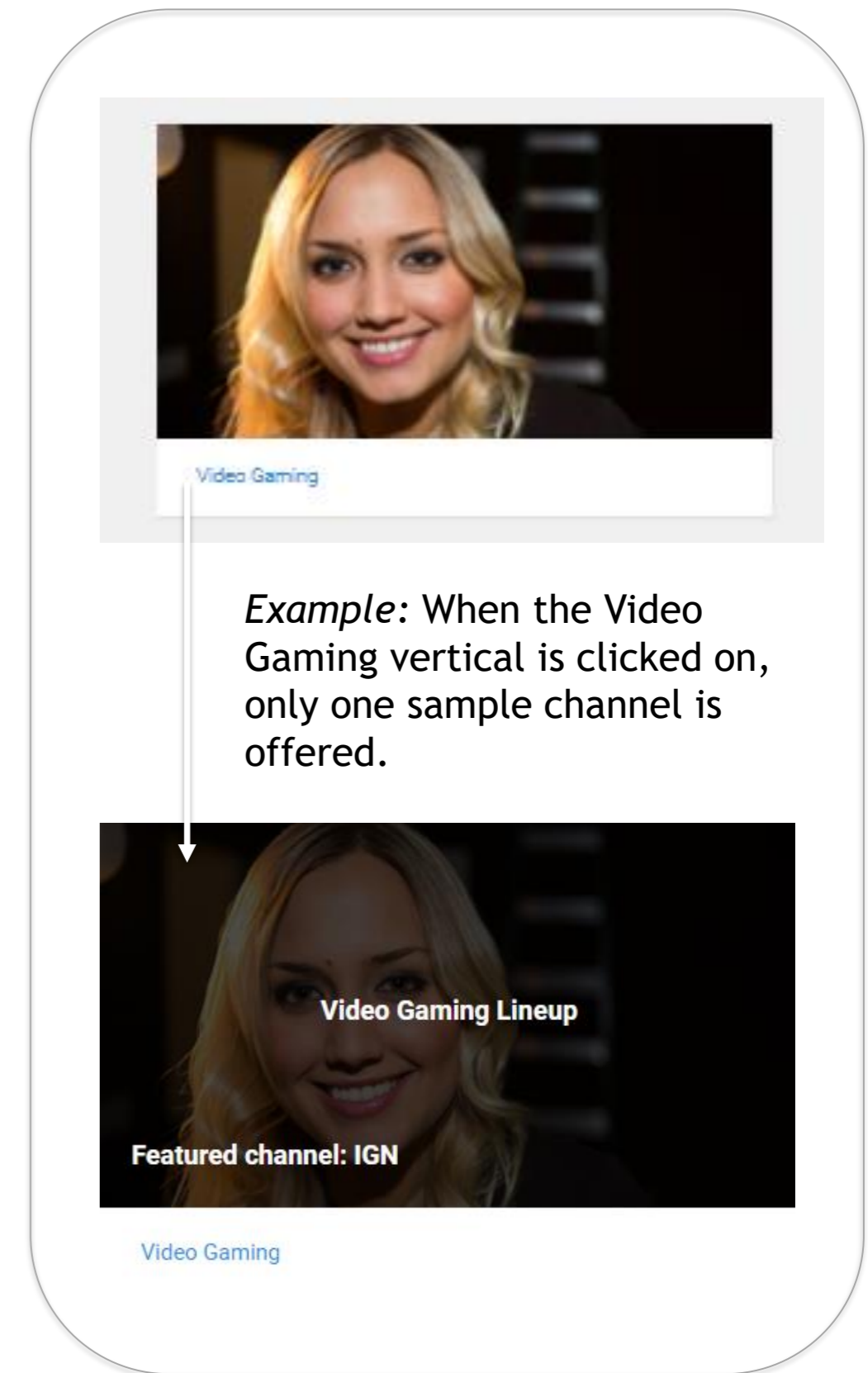
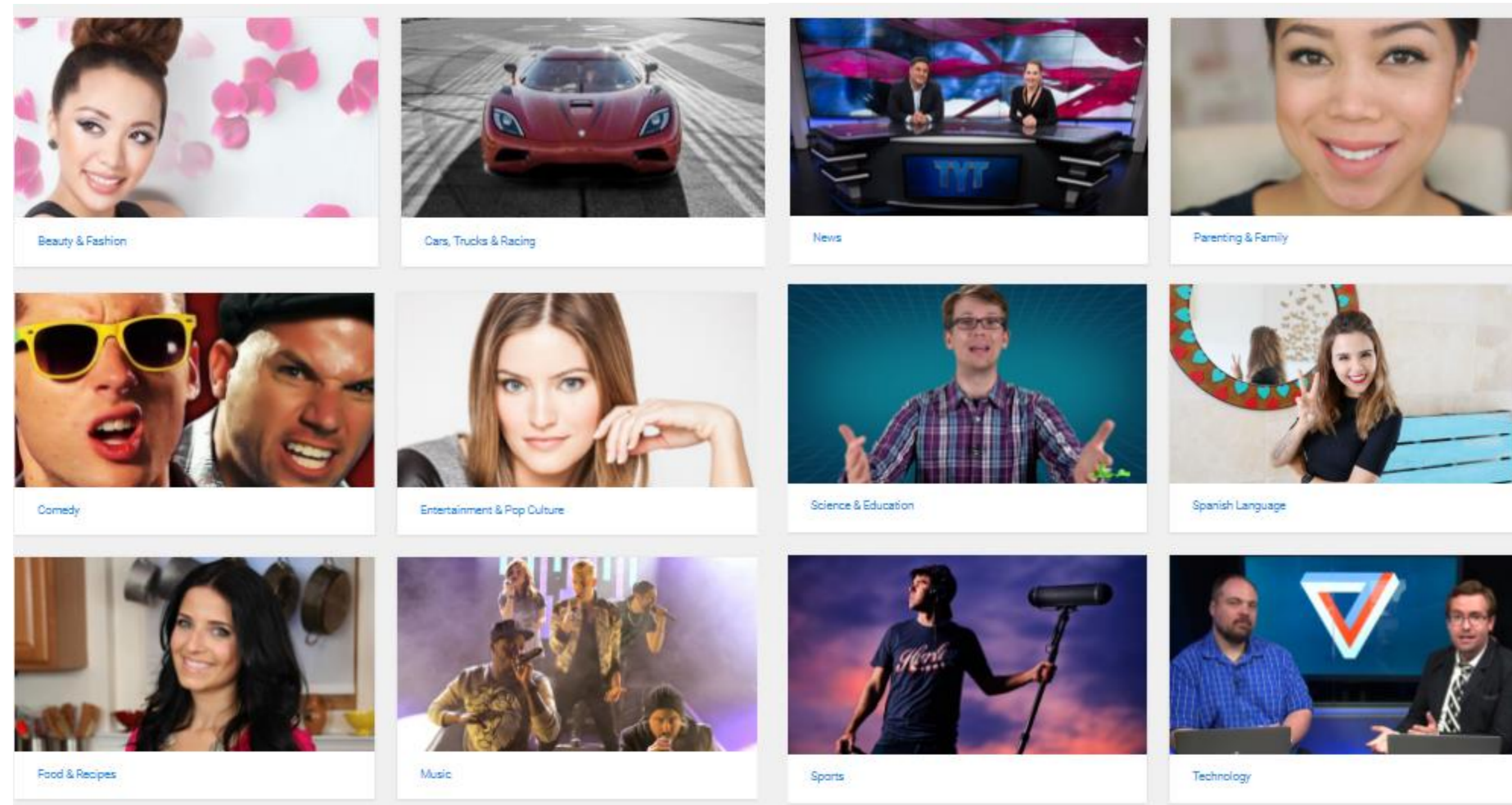
While these long tail, UGC channels create an environment ripe for brand safety issues, the problems extend to YouTube's premium content as well.

The lack of transparency into YouTube's most desirable inventory, coupled with the relative creative autonomy of top channels and influencers, contributes to an uncertain content environment for advertisers.



YouTube Offers Little Transparency Into *Google Preferred*, Its Top 5% of Channels Across Several Vertical Categories

Details on the channels - including basic information such as a current list of channels within each vertical - are not publicly available



Even sample line-ups, once provided in the past, do not appear to exist

Marketers pay a premium for a brand-building, brand-safe environment, however that is not always what they get



Advertisers Are Increasingly Weary Of Brand Safety On Google Preferred (Report)

“ Given that YouTube doesn’t share the specifics of the lineup, several ad buyers **‘felt misled’** for paying top dollar on campaigns that could or did end up running against questionable content.

“ As more ad buyers dig into what’s really for sale through Google Preferred, there’s a growing sense among some that Google **oversold the premium, brand safe nature** of these videos.

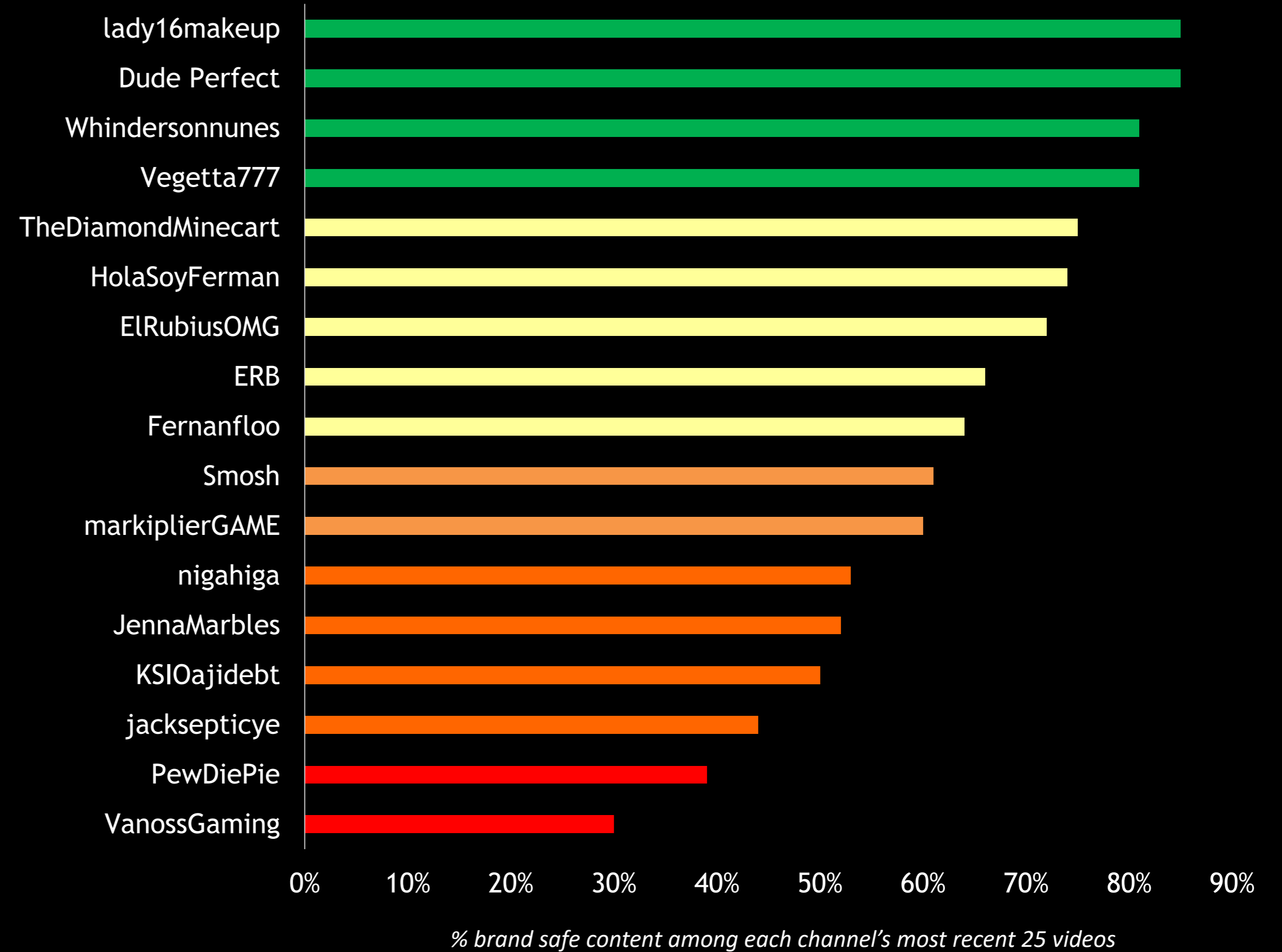
BUSINESS INSIDER

'This is not TV': A growing number of advertisers feel duped by YouTube

Similarly, the top YouTube influencers adhere to varying degrees of brand safety or suitability

- Not even a quarter of Influencers were deemed brand safe (a score over 80%)
- 67% of videos contained or displayed unsafe language
- 61% of videos contained negative sentiment

Top YouTube Influencer Brand Safety Scores



These Influencers are heavily monetized (ad supported). In total, they are estimated to earn as much as \$88 million annually, but what kind of branding environment do they offer?

Source: Delmondo + Uru "The Top YouTube Stars Ranked by Brand Safety", March 2018; analysis included the top 25 most recent videos from the top 17 YT influencers as per SocialBlade global ranking (by subscribers) disregarding mainstream music artists. Safety Score reflects the amount of brand safe content among recent videos. "Unsafe" content is defined as content showcasing unsafe objects and themes such as weapons, drugs, terrorism, and celebrity scandals; unsafe language, such as profanities, misogyny, and hate speech; paid or sponsored content, negative sentiment; not safe for work content such as nudity and extreme violence; Influencer estimates from SocialBlade, August 2018. Scoring Methodology: Uru uses a combination of computer vision, natural language processing, and other artificial intelligence to generate video brand safety scores.

A Look At Recent Videos Produced By Some Of The Most Popular Channels Illustrates Their Questionable Quality

Ryan Toys Review
 13.5M Subscribers
 21B Video Views



Nintendo Labo Build and Control Your Own Giant



Cake Switch Up Challenge!!!



Ryan Pretend Play with Box Fort Pizza Delivery and Ice

PewDiePie
 62.3M Subscribers
 18B Video Views



PREQUEL MEMES



WE LIVE IN A SOCIETY WHERE 9 YEAR OLDS ARE



U SLAV U LOSE

Fun Toys Collector
 10.2M Subscribers
 14B Video Views



Mickey Magical Playhouse Playdoh Disney Junior



Play Doh Popsicles DIY Marble Popsicle ice cream



shimmer and shine Egg Surprise | Paw Patrol Egg

Popular MMOs
 14.3M Subscribers
 11B Video Views



Minecraft: TNT LUCKY BLOCK BEDWARS! - Modded



Minecraft: ARCADE GAMES!! (PACMAN & PONG)



Minecraft: MORE TOTEMS!! (ORE DETECTOR, TOOL)

Toy Pudding TV
 14.5M Subscribers
 10B Video Views



Baby doll refrigerator kitchen toys baby Doli play



Picnic Car and Baby doll toys baby Doli surprise eggs play



Baby doll mart register and food toys baby Doli play

Source: SocialBlade.com, 4/25/18, based upon "top YouTubers in the United States sorted by video views" Includes only YouTube original content (e.g. no music or TV content). M = millions, B = Billions.

While edgy content may be suitable for some brands, it is the exception, not the rule. Given their relative creative autonomy, “Influencers” are able to blur the line between provocative and inappropriate, with brands along for the ride.

Even categories and brands that may be more open to edgy content have recently boycotted YouTube. Companies such as these:



Example Beam Suntory brands



Example PepsiCo brands



Example Diageo brands



In Order To Find Brand-Appropriate Content Some Marketers Have Reduced The Number Of Channels They Appear On, But Many Still Need To Go Thousands Deep To Get The Scale They Desire



Under Armour has begun “implementing additional filters and controls to ensure our brand presence on YouTube reflects our values”



P&G has reduced the number of channels it advertises on from 3 million to 10,000



In attempts to find a scalable solution, JP Morgan Chase has whittled down its list from 400,000 channels to 3,000

YouTube offers a deep list of channels to advertisers because, in aggregate, it is what's required to build audience reach

However, advertisers need to ask themselves if it's worth risking brand stature (at best) or brand safety (at worst) by running on hundreds (or thousands) of channels



A sunset sky with a teal text box. The sky transitions from a deep blue at the top to a bright yellow and orange at the bottom where the sun is setting. There are scattered white and grey clouds. A semi-transparent teal rectangular box is positioned in the middle of the image, containing white text.

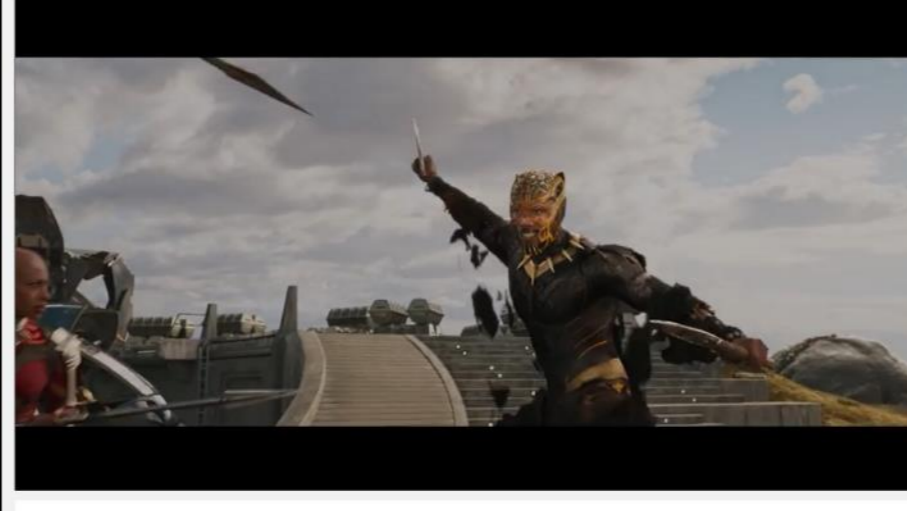
A Safe Haven on YouTube: TV and Film Content

TV and Film offer some of the most popular, most viral, brand-building and brand safe content on the platform

Quality, Brand Safe TV & Film Content Can Routinely Garner Hundreds Of Thousands To Millions Of Video Views



Crosswalk the Musical: Beauty and the Beast
The Late Late Show with James Corden
10,995,780 views




#BlackPanther
Marvel Studios' Black Panther - Official Trailer
40,166,805 views




#23 on Trending
Jimmy Kimmel Interviews Bachelorette Becca & Fiancé Garrett
486,667 views




Jurassic World: Fallen Kingdom - Final Trailer [HD]
25,764,983 views



This Is Us - This Is Us Generations (Digital Exclusive)
638,060 views



#SNL #ONL43
Donald Trump Robert Mueller Cold Open - SNL
3,927,615 views



Lady Bird | Official Trailer HD | A24
13,904,177 views



Trevor Noah Responds to Criticism from the French Ambassador - Between The Scenes | The Daily Show
3,776,739 views



Shaq's First-Ever Shark Encounter | Shaq Does Shark Week
1,137,059 views



Incredibles 2 Official Trailer
42,847,117 views



Stephen A. and Max on Kawhi Leonard: Will he end up in LA? | First Take | ESPN
538,296 views



The Big Bang Theory - Sheldon and Amy's Wedding
462,604 views

This Professionally Produced,
Premium TV and Film Content Is
Backed By An Annual Production
Investment Of Over \$62 Billion

This means a slew of new content is available
on YouTube each day, from broad general
interest programming to niche content



Source: S&P Global Market Intelligence, SNL Kagan; film negative cost inclusive of domestic films released during calendar 2017; TV data reflective of 2018 programming expenses estimates.

TV and movies are also some of the most “talked about” topics across social media, much more so than YouTube content.

A custom VAB analysis, *#TVisSocial*, revealed that Ad-supported TV dominates the social conversation online. Conversely, the audience fragmentation and long-tail nature of YouTube severely limits any mass exposure, and therefore conversation.

Top 10 Trending Topics On Twitter By Platform
A study of the top 10 Twitter Topics over 4-week period

83

Ad-Supported
Television

5

Movies

2

YouTube



Source: VAB custom analysis of Top 10 trending Twitter Topics each night (8:30p, 9:30p, 10:30p, 11:30p) during 4-week time period (5/15/2017 - 6/11/2017). Based on unique program counts. For the purposes of this chart, “program / content” is an all-encompassing definition for individual pieces of content on each platform.

So It's No Surprise That Viewers Actively Seek Out More Professionally-Produced Content On YouTube

A custom Program Engagement survey conducted by VAB confirmed that consumers use YouTube as a supplementary destination for TV clips and content.

Interestingly, Millennials were proven to be insatiable consumers of TV content on YouTube.

55% of Millennials always or frequently watch TV clips on YouTube

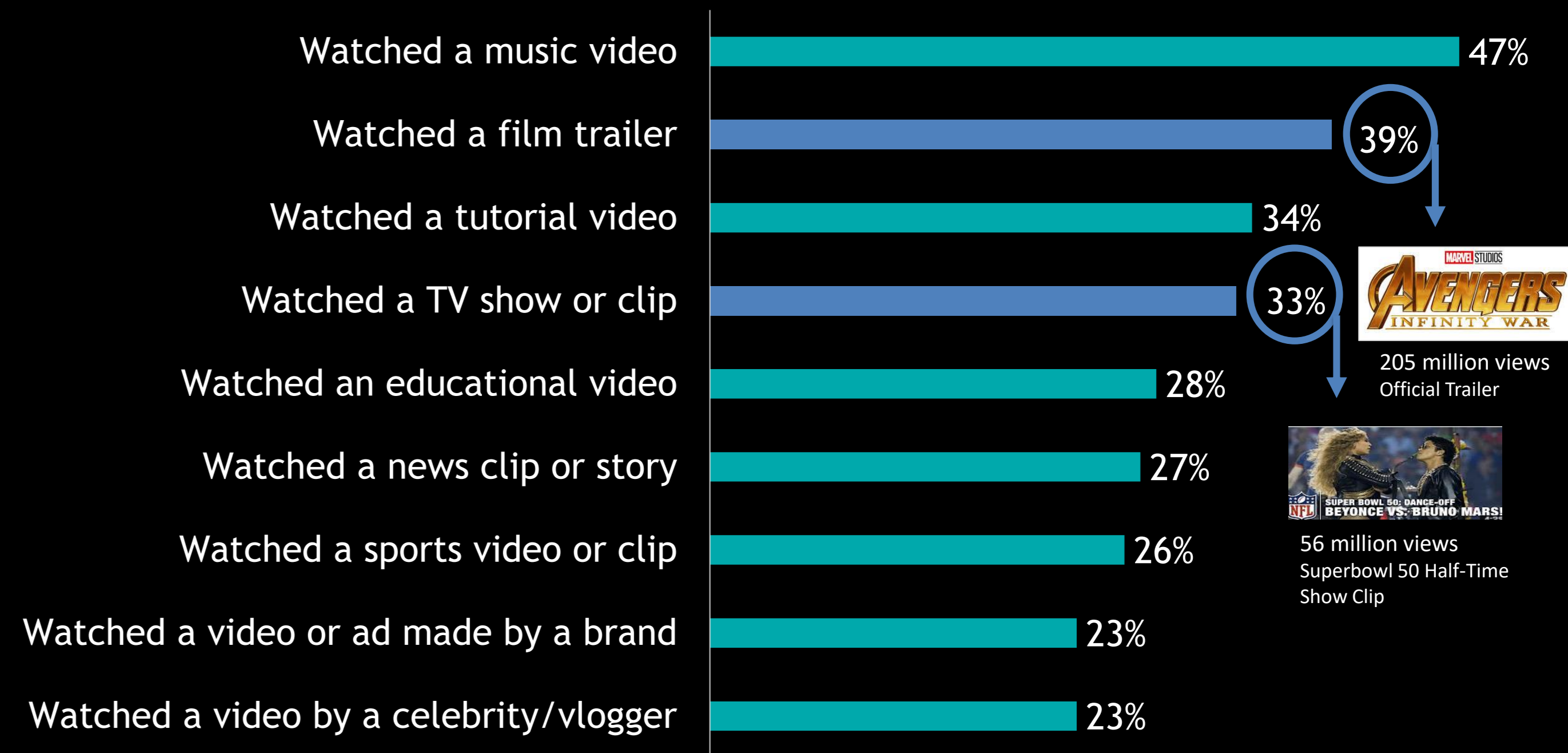


49% of Millennials always or frequently post comments on the TV clips they watch to engage with other fans



In fact, TV show clips and film trailers are among the most popular content on YouTube, more than vlogger or celebrity videos

Most Popular Activities On YouTube % users who have done the following



This Popularity Drives A Swell Of Virality Which Leads To TV & Film Content Being Some Of The Highest Trending Videos On The Platform

6 of the top 10 trending videos in 2017 were ad-supported TV or Film; content absent of brand safety concerns or long-tail audience limitations.

The Mask Singer2 (Thailand)



YouTube 240MM Views

America's Got Talent - Darci Lynne



YouTube 48MM Views

Carpool Karaoke - Ed Sheeran



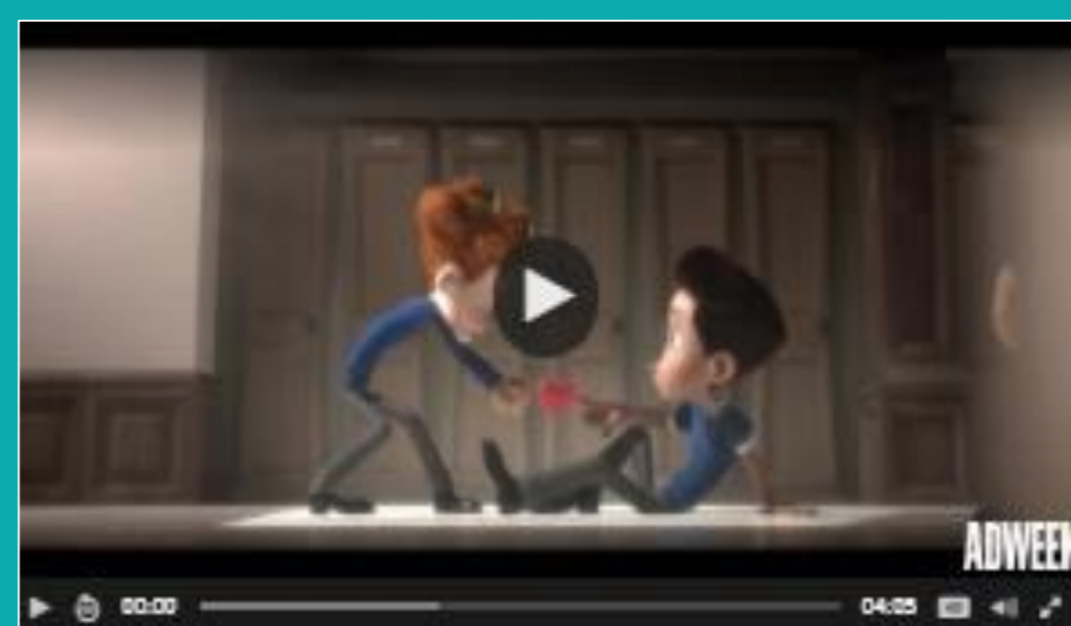
YouTube 45MM Views

Lady Gaga's Full Super Bowl LI Halftime Show / NFL



YouTube 42MM Views

In a Heartbeat - Animated Short Film



YouTube 36MM Views

Children Interrupt BBC News Interview

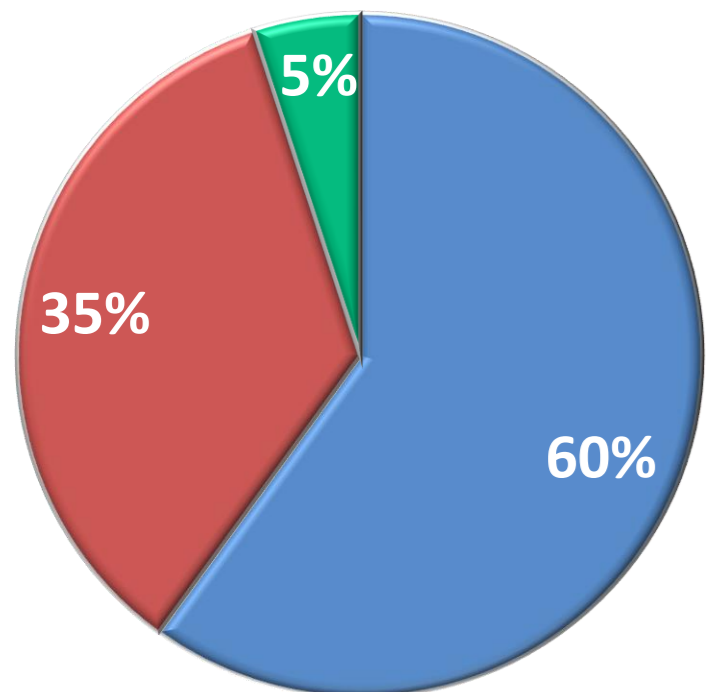


YouTube 27MM Views

As A Result Of This Virality, TV Clips And Film Trailers Drive More Buzz And Views Than YouTube Original Content

In April 2018, VAB performed a custom analysis tracking the top 10 trending videos each day over a 2 week period on YouTube. The total videos & video views were analyzed and categorized.

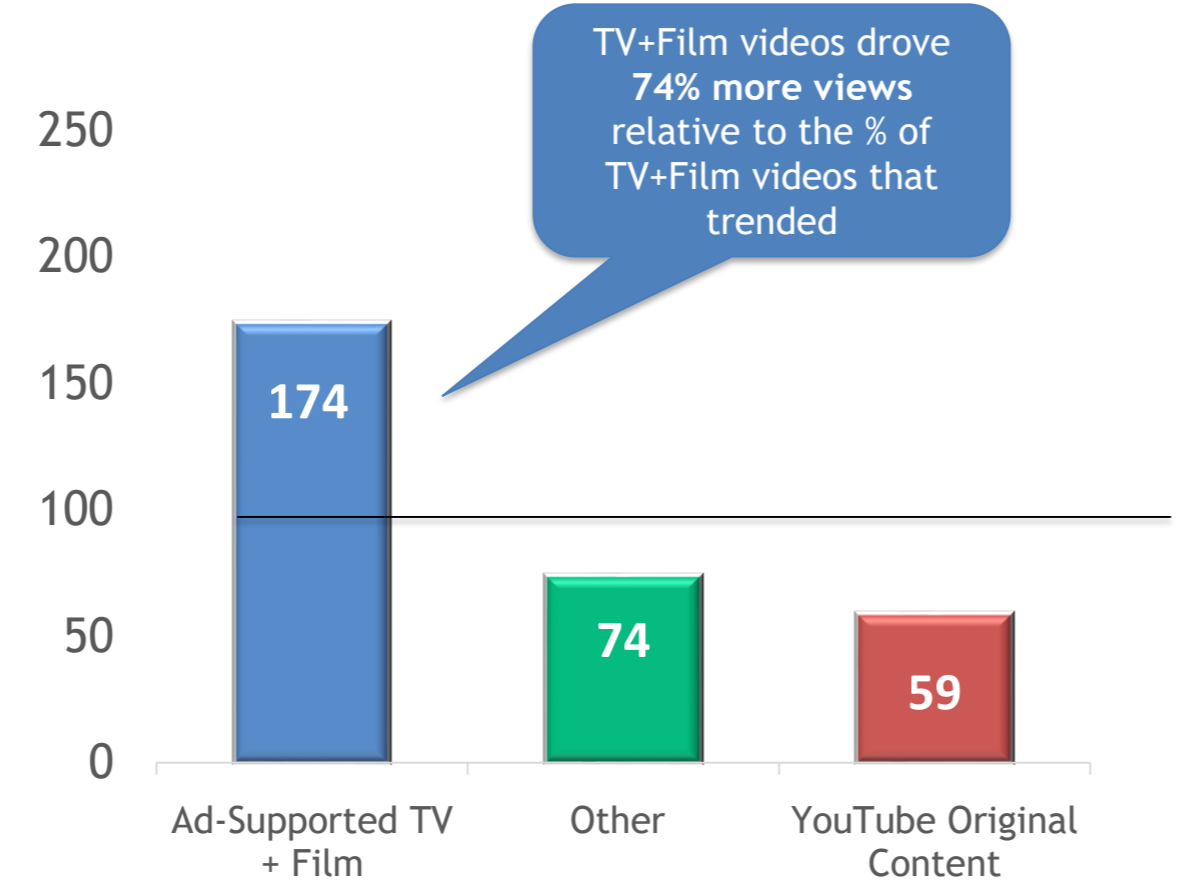
% of Video Views, by category



- Ad-Supported TV + Film
- YouTube Original Content
- Other

Trending Video “Buzz Index”

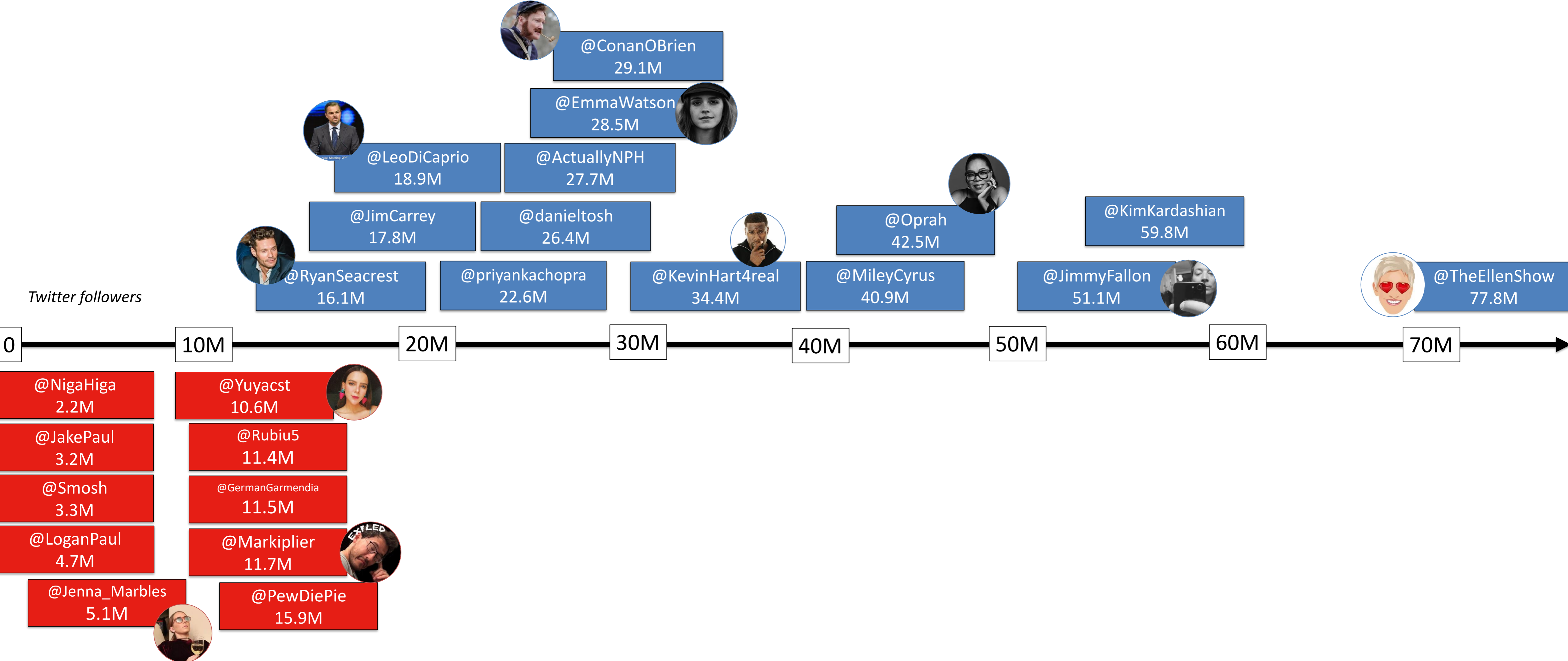
% of total video views / % of total trending videos



Source: VAB custom analysis, Top 10 Trending Videos on YouTube collected each afternoon, 4/17-4/30; Excludes professionally-produced music video channels (e.g. Vevo). “Other” is comprised of content posted by other media publishers such as BuzzFeed, Wired, and non-ad supported TV.

Much Of This Buzz Is Supported By The Large Social Followings Of TV And Film Actors In Relation To Even The Most Popular YouTubers

TV, Film and YouTube Personalities With Largest Twitter Followers



Source: Twitter.com, 4/25/18; TV - TV personalities with the largest Twitter followings; YouTube - Twitter followers of the top YouTube personalities, by subscriber count. M= Million

YouTube TV: If You Can't Beat 'Em, Join 'Em



Recognizing the power and popularity of TV content, YouTube launched subscription-based, YouTube TV in April 2017. YouTube TV enables viewers to stream 60+ entertainment & sports networks for \$40/month.

AdAge

YOUTUBE WILL BEGIN SELLING ADS IN LIVE TV SERVICE

By Seanine Poggi. Published on April 29, 2018.



In order to offer advertisers the premium, brand-safe content they demand, YouTube began selling ads in live YouTube TV programming. YouTube TV will also be included as part of Google Preferred as more quality content is required to justify the premium pricing.

“Having more premium content, and access to more popular content, was always of interest to our advertisers.”

*- Debbie Weinstein, managing director,
YouTube/Video Global Solutions*

Choosing to Protect Your Brand



No guarantees

The sheer volume of content and lack of regulation at the point of upload makes YouTube a difficult ad platform to guarantee 100% brand safety.



Scale comes at a price

By aggregating content across hundreds or thousands of channels, YouTube offers advertisers the reach they want, but is it to the detriment of brand stature and brand safety?



Threats are pervasive

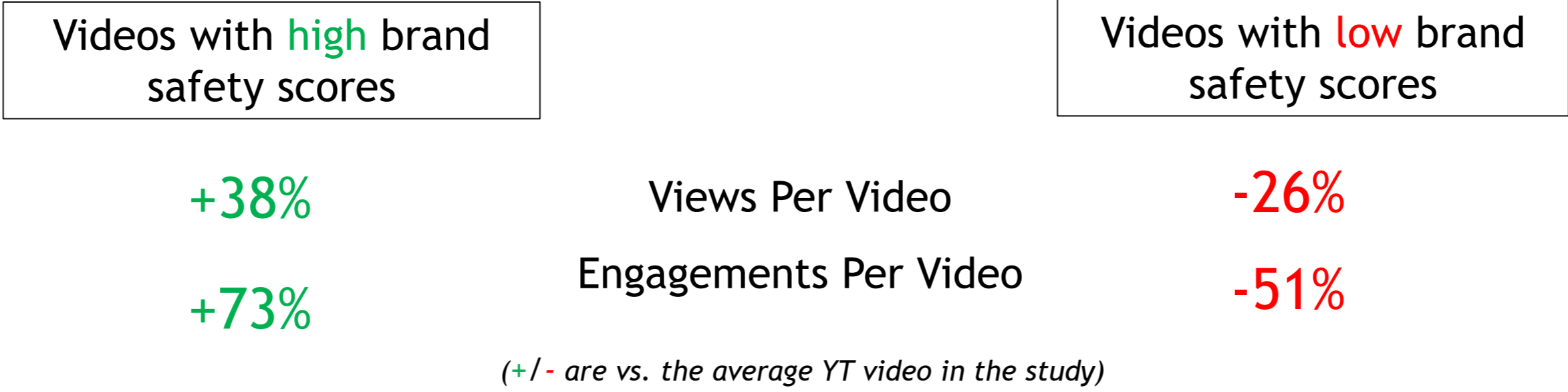
Brand safety issues are most prevalent on long-tail user generated channels, but can also be found within premium content. Given relatively few channels are measured and the lack of transparency into what's sold as YouTube's most premium content, can advertisers be assured of what environment their ads are placed in?



Popularity of Brand Safe TV & Film Content

Some of the most popular content on YouTube are Film and TV-related videos. This premium, emotionally compelling content delights consumers and is reassuring to advertisers seeking quality programming in a brand safe environment.

And Just Remember, Content Environment Matters To Consumers So It Should Definitely Matter To Marketers




36% of consumers think an ad is an endorsement by the brand



20% of consumers will boycott, be vocal, or raise issues about brands that run adjacent to offensive content



37% of consumers change how they think of brands that run alongside offensive content when making a decision to buy



Contact Us



Danielle DeLauro
Executive Vice President
danielled@thevab.com

Jason Wiese
SVP, Director of Strategic Insights
jasonw@thevab.com

Marianne Vita
VP, Strategic Insights
mariannev@thevab.com

Reed Kiely
Senior Multi-Platform Video Analyst
reedk@thevab.com

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Lastly, Because YouTube Is Used As a Supplementary TV Destination, It Also Houses A Massive Amount of TV/Film-Related Videos

TV fans are so passionate about the programs and characters they love that they are inspired to create, post, and share TV clips and content on YouTube.

A look at the **top 5 TV programs and films** & the **top 5 YouTube channels** shows that there are significantly more videos related to those TV/Films (clips, fan commentary, behind the scenes) than to the YouTube channels/influencer.

Top 2018 TV Programs/Films & YouTube Channels - # of Related Videos

