



Trends Report
2016

The Big Game on YouTube

1. The Culture Around the Game

2. Ad Watch-Time Trends

3. Mobile as the First Screen

The big game is more than just the sport itself.

Food, music, comedy, and of course, ads all combine to create the culture surrounding America's big game. By analyzing millions of hours of watch time, we are able to provide a strong representation of today's fan, gain insights into the trends that impacted last year's game, and shed light on what we expect to see this year.



1. The Culture Around the Game

Thanks to online video, there are more ways than ever for fans to indulge their passion for football before, during, and after the big game—ranging from the highlights of last week's game to a hilariously bad lip reading of sideline comments.



Advertising



Comedy



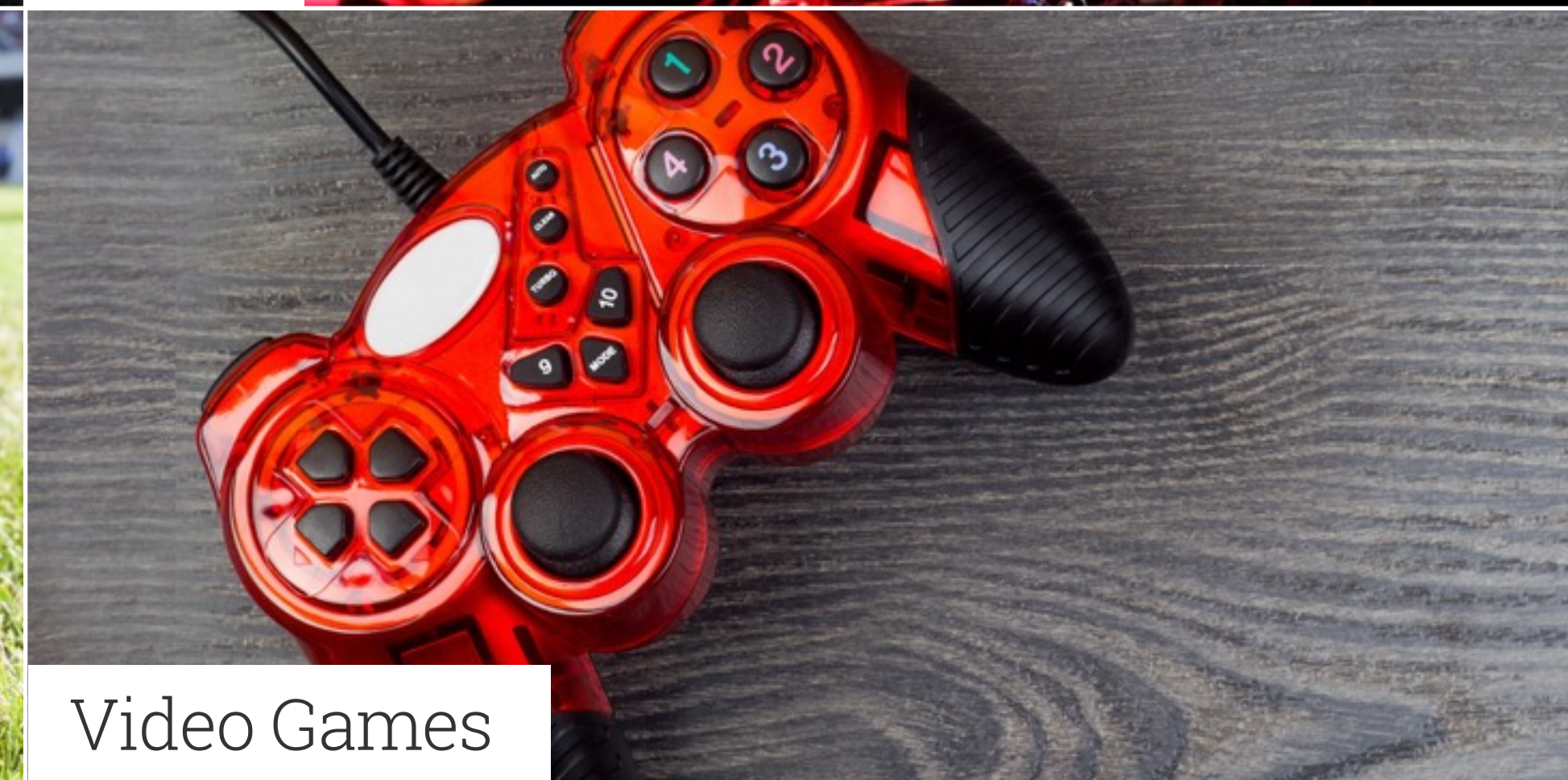
Food & Recipes



Music



News & Highlights



Video Games

Advertising

(i.e., commercials from the big game)

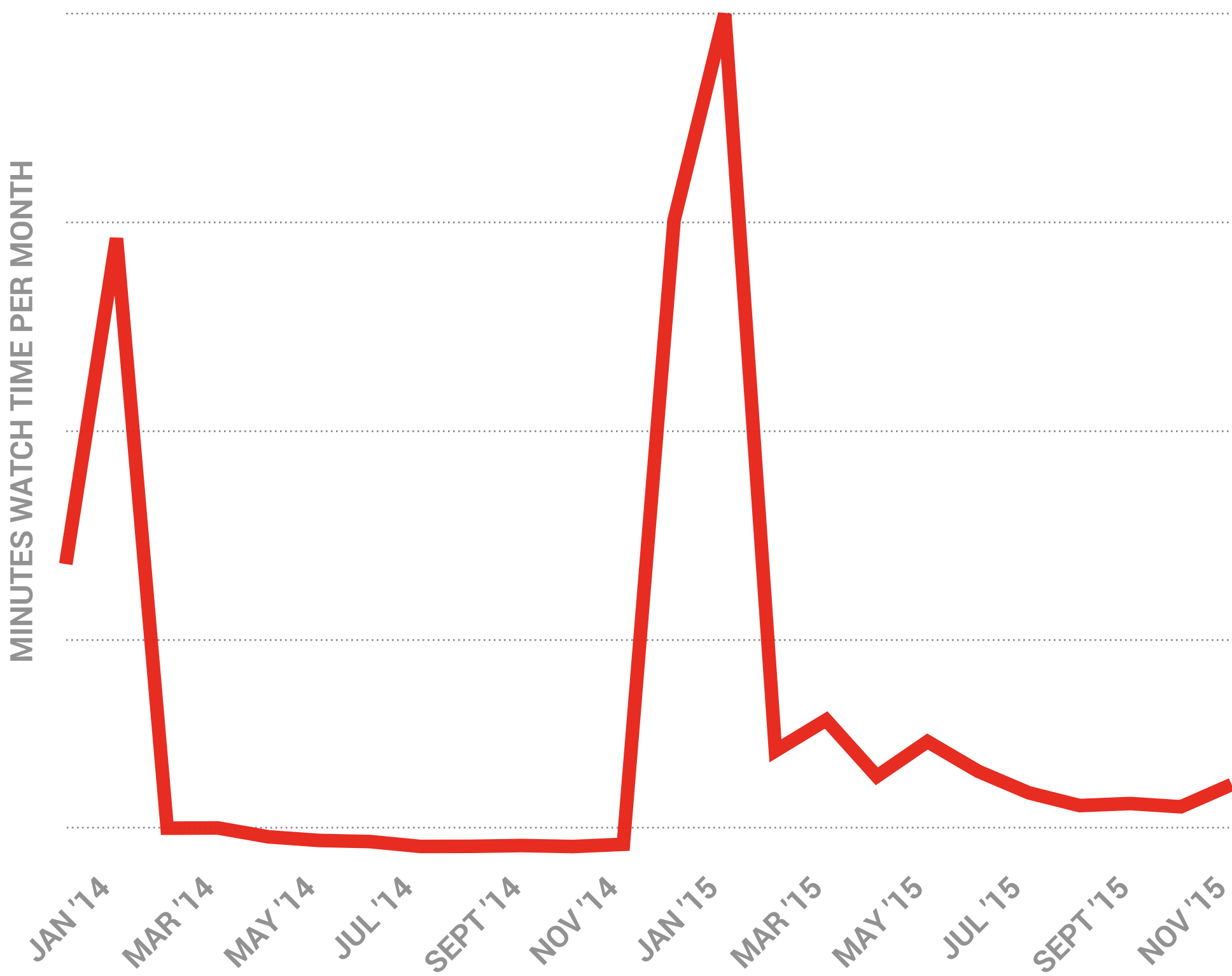
Second only to football content itself, watch time for game day ads remains strong and is growing, representing 840 million minutes of watch time in 2015, a 127% year-over-year increase.

127%

GROWTH YEAR OVER YEAR

840M

MINUTES WATCHED IN 2015



Source: YouTube data, January 2014–December 2015, global. Classification as a "big game ad," "music video," "comedy video," "news and highlights video," "food and recipes video," and "video game video" was based on public data such as headlines, and tags, and may not account for every such video available on YouTube.

Top YouTube Search Examples

Super Bowl Commercials 2015

Kim Kardashian Super Bowl Commercial

Budweiser Puppy Commercial 2015

Jurassic World Super Bowl Trailer

Fast and Furious 7 Trailer Official 2015

Liam Neeson Clash of Clans

Google data, January–February 2015, United States. Classification as a football related "food," "video game," "news and highlights," "comedy," "advertising" and "music" search was based on public data such as headlines, and tags, and may not account for every such video available on YouTube.



Comedy

(i.e., football pranks, bloopers, parodies)

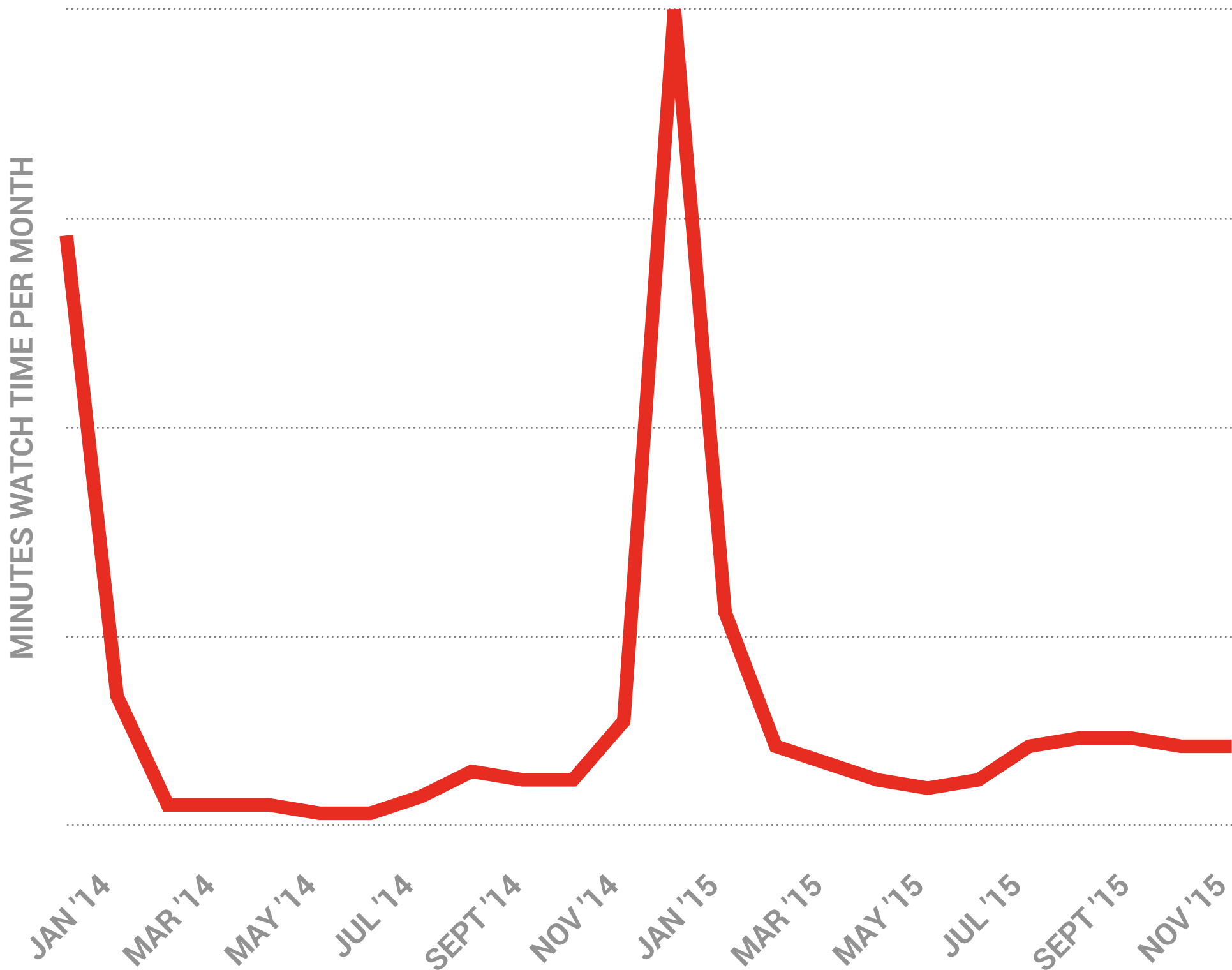
Watch time for football-related comedy videos grew 47% year over year in 2015. We see watch time start to rise in November, coinciding with the final race to the playoffs.

47%

GROWTH YEAR OVER YEAR

230M

MINUTES WATCHED IN 2015



Source: YouTube data, January 2014–December 2015, global. Classification as a "big game ad," "music video," "comedy video," "news and highlights video," "food and recipes video," and "video game video" was based on public data such as headlines, and tags, and may not account for every such video available on YouTube.

Top YouTube Search Examples

- Key and Peele
- Bad Lip Reading NFL
- East West Bowl 3
- Tosh.O
- Key and Peele Super Bowl
- Key and Peele Football Names

Google data, January–February 2015, United States. Classification as a football related "food," "video game," "news and highlights," "comedy," "advertising" and "music" search was based on public data such as headlines, and tags, and may not account for every such video available on YouTube.



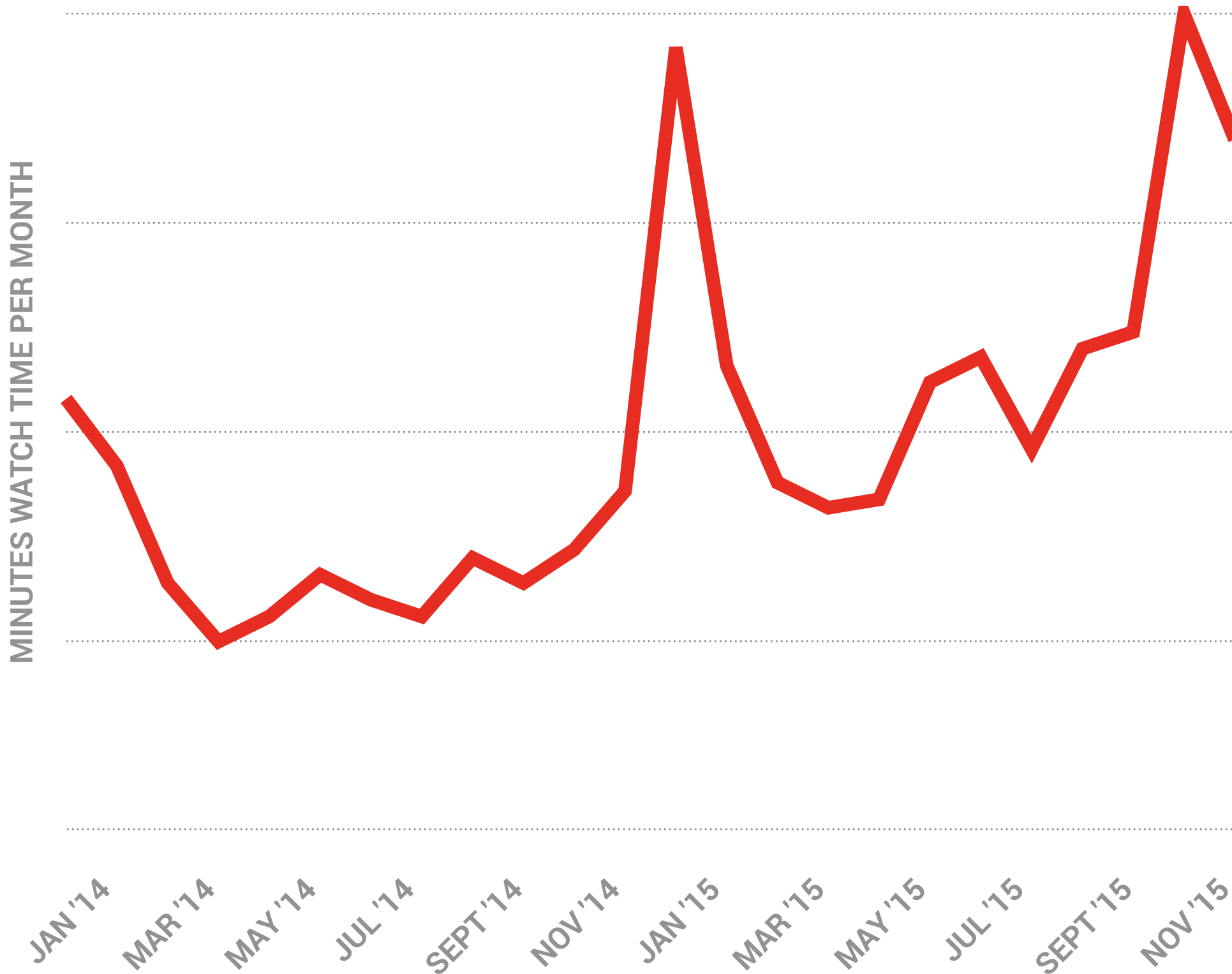
Food & Recipes

(i.e., tailgating recipes, party menu ideas)

It's not just entertainment that's driving football fans to YouTube. We've also seen more evergreen, established categories, like football-related food and recipes, continue to rise, with video watch time growing 77% in the last year. Category watch time spikes in January, as people begin to plan their game day parties.

77%
GROWTH YEAR OVER YEAR

88M
MINUTES WATCHED IN 2015



Source: YouTube data, January 2014–December 2015, global. Classification as a "big game ad," "music video," "comedy video," "news and highlights video," "food and recipes video," and "video game video" was based on public data such as headlines, and tags, and may not account for every such video available on YouTube.

Top YouTube Search Examples

Tipsy Bartender

Nachos Recipe

Chicken Wings Recipe

Spinach Dip

Buffalo Chicken Dip

Hot Wings

Google data, January–February 2015, United States. Classification as a football related "food," "video game," "news and highlights," "comedy," "advertising" and "music" search was based on public data such as headlines, and tags, and may not account for every such video available on YouTube.



Music

(i.e., halftime entertainment, pump-up songs)

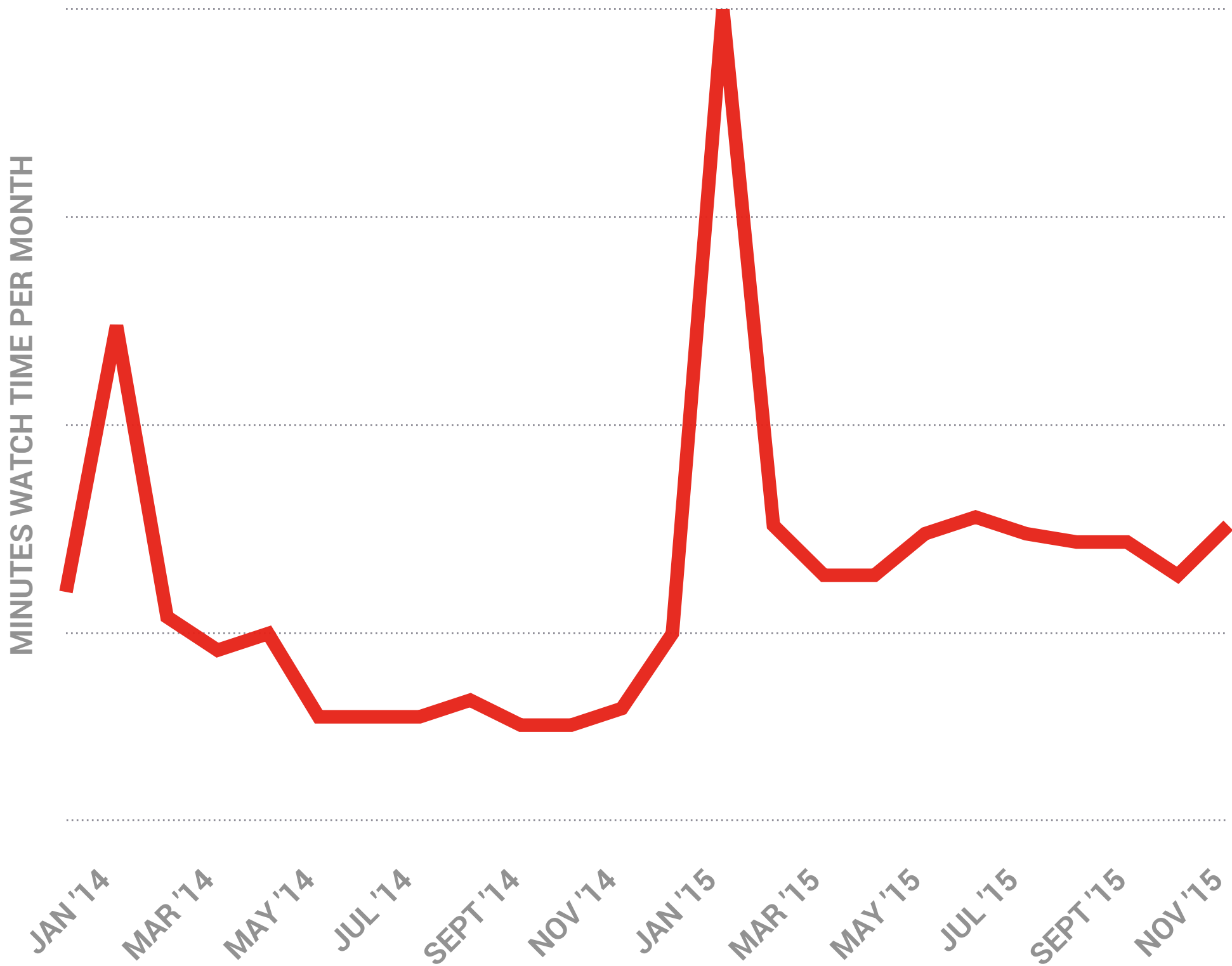
While football-related music includes everything from pump-up songs to “The Super Bowl Shuffle,” it’s no surprise that many of the top YouTube searches are for videos of the halftime show, as people turn to YouTube after the game to rewatch their favorite moments from the show.

78%

GROWTH YEAR OVER YEAR

820M

MINUTES WATCHED IN 2015



Source: YouTube data, January 2014–December 2015, global. Classification as a “big game ad,” “music video,” “comedy video,” “news and highlights video,” “food and recipes video,” and “video game video” was based on public data such as headlines, and tags, and may not account for every such video available on YouTube.

Top YouTube Search Examples

Katy Perry Super Bowl 2015

Beyonce Super Bowl

Missy Elliott Super Bowl

Left Shark

Katy Perry Halftime Show

Super Bowl Halftime Show

Google data, January–February 2015, United States. Classification as a football related “food,” “video game,” “news and highlights,” “comedy,” “advertising” and “music” search was based on public data such as headlines, and tags, and may not account for every such video available on YouTube.



News & Highlights

(i.e., replays, highlight reels, commentary, trick shots)

From football tricks to replays of football’s greatest moments, the big game isn’t the only time of year people tune in to football content. In the fall and spring we see watch time rise respectively with the start of the football season and the NFL draft.

202%

GROWTH YEAR OVER YEAR

1.4B

MINUTES WATCHED IN 2015



Source: YouTube data, January 2014–December 2015, global. Classification as a "big game ad," "music video," "comedy video," "news and highlights video," "food and recipes video," and "video game video" was based on public data such as headlines, and tags, and may not account for every such video available on YouTube.

Top YouTube Search Examples

Super Bowl 2015 Highlights

Dude Perfect

Dude Perfect Odell Beckham

Malcolm Butler Interception

Super Bowl 49

Patriots vs. Seahawks

Google data, January–February 2015, United States. Classification as a football related "food," "video game," "news and highlights," "comedy," "advertising" and "music" search was based on public data such as headlines, and tags, and may not account for every such video available on YouTube.



Video Games

(i.e., football-related playthroughs, reviews)

In this category, we see two unique spikes—the first coincides with game day and the second coincides with the release of the newest Madden video game in August. Given the overall growing popularity of the video game category, we also see strong year-over-year growth for this specific subsegment.

175% **475M**

GROWTH YEAR OVER YEAR MINUTES WATCHED IN 2015



Source: YouTube data, January 2014–December 2015, global. Classification as a "big game ad," "music video," "comedy video," "news and highlights video," "food and recipes video," and "video game video" was based on public data such as headlines, and tags, and may not account for every such video available on YouTube.

Top YouTube Search Examples

- Madden 15
- AntoDaBoss
- Madden 15 Super Bowl
- Madden 16
- Career Mode Madden 16
- Madden Mobile Super Bowl Champion Pack

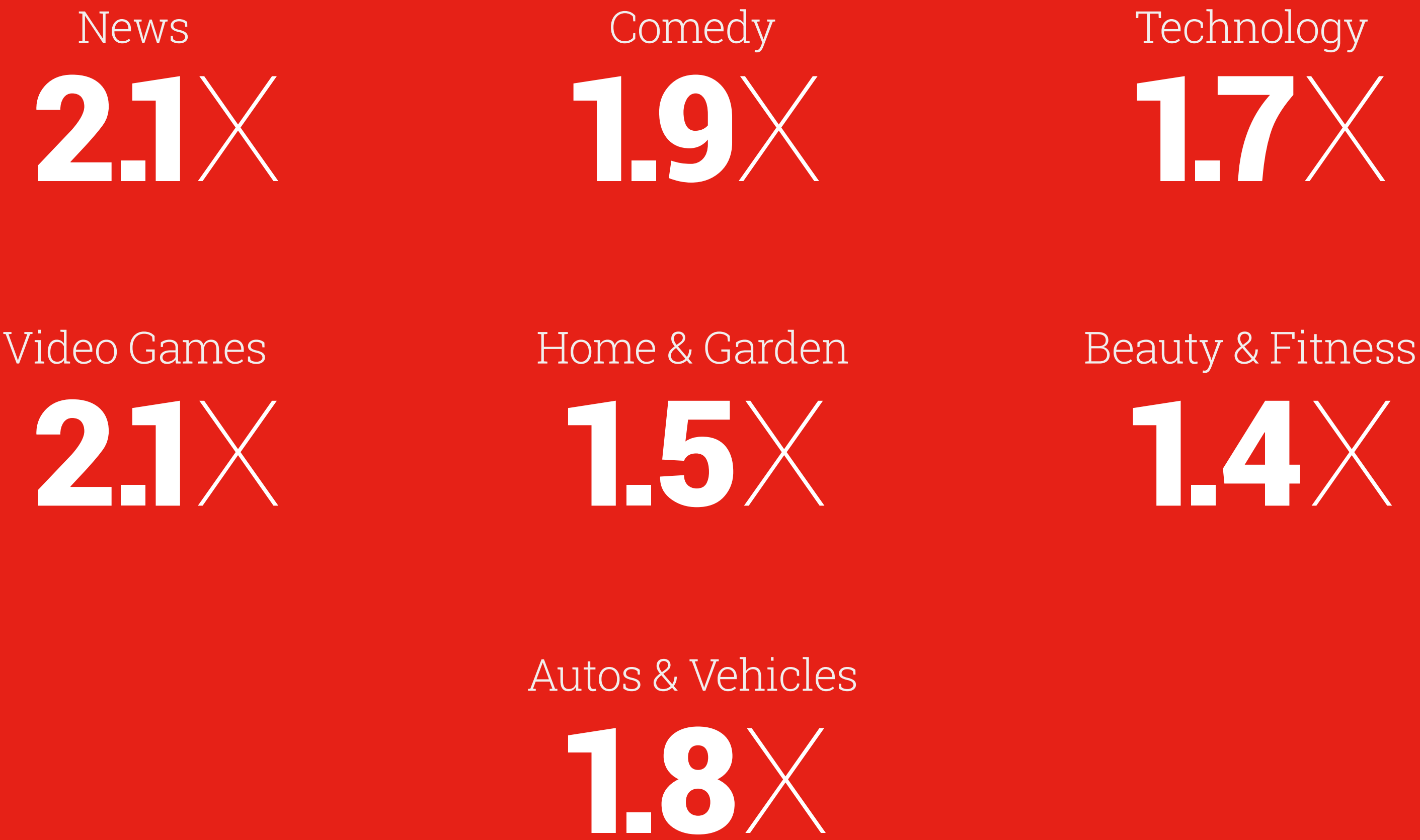
Google data, January–February 2015, United States. Classification as a football related "food," "video game," "news and highlights," "comedy," "advertising" and "music" search was based on public data such as headlines, and tags, and may not account for every such video available on YouTube.



What Else Fans Watch

Football fans aren't only watching football content. Their interests span far and wide. Looking at viewership patterns across different categories gives us some insight into what else football fans are watching.

Football fan likelihood to watch YouTube videos in each category, compared to the the average YouTube user.



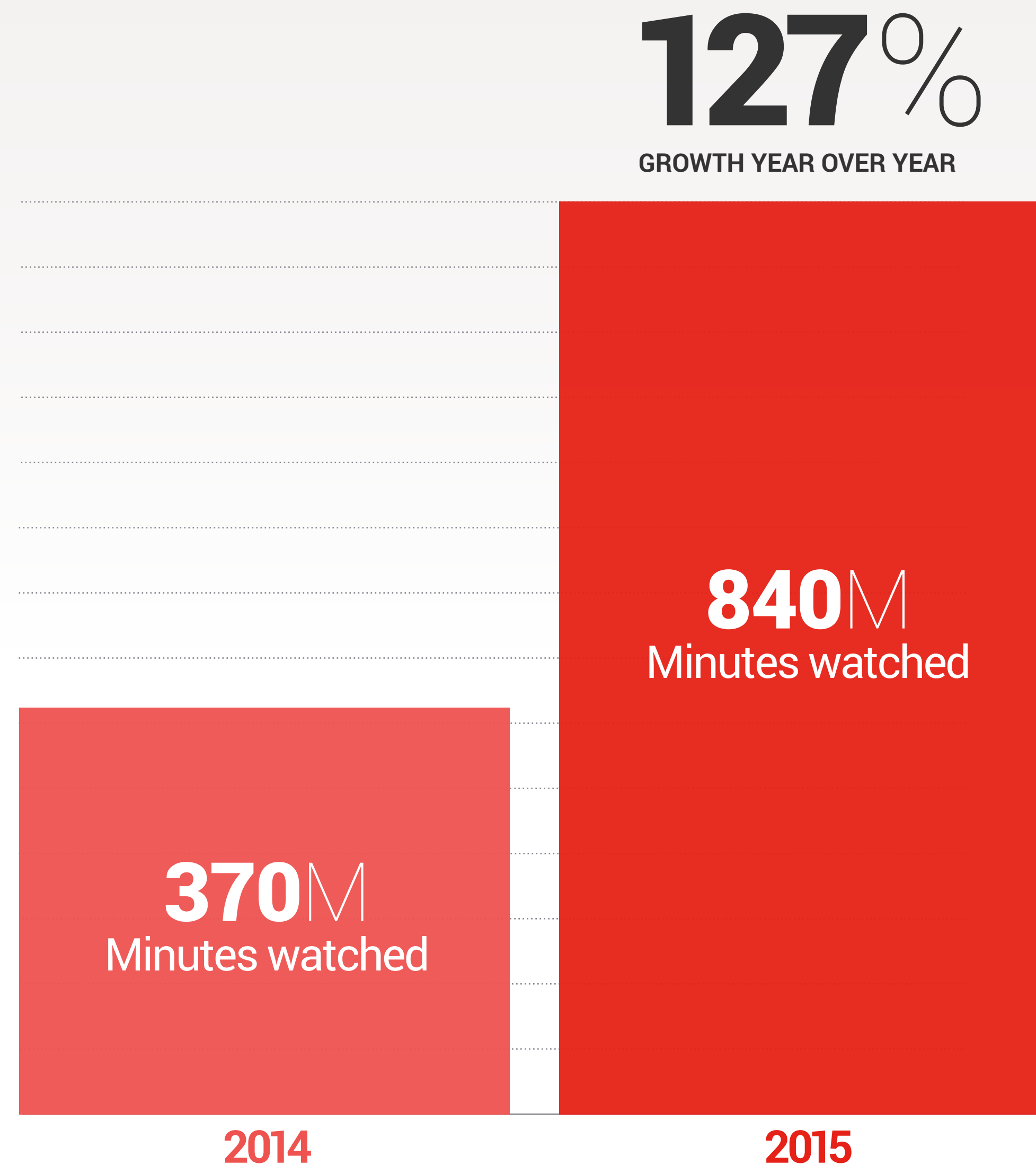
Source: Google data, December 2015, United States. Google-defined lifestyle, psychographic, and behavioral audiences based on anonymized, aggregated user browsing behavior on the Google Display Network.



2. Ad Watch-Time Trends

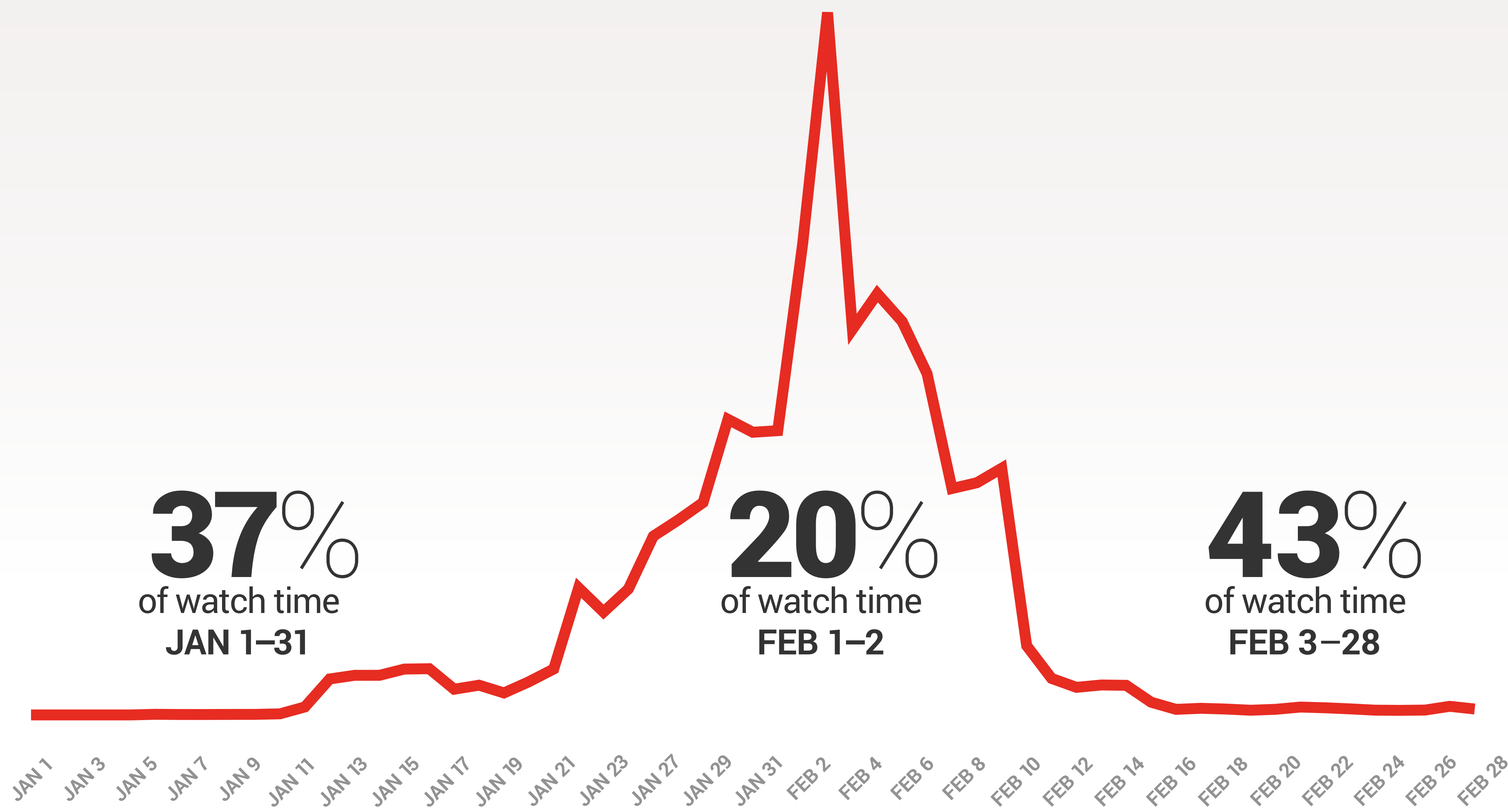
People are increasingly turning to YouTube to watch ads from the big game—watch time grew 127% from 2014 to 2015.

Source: YouTube data, January–December 2015 vs. January–December 2014, global. Classification as a "big game ad" was based on public data such as headlines and tags, and may not account for every big game ad available on YouTube.



Jan–Feb Ad Watch Time

Watch time of big game ads starts rising in January, peaks the day after the big game, and remains strong for the next 1–2 weeks. Fully 20% of watch time happens over the course of 48 hours.

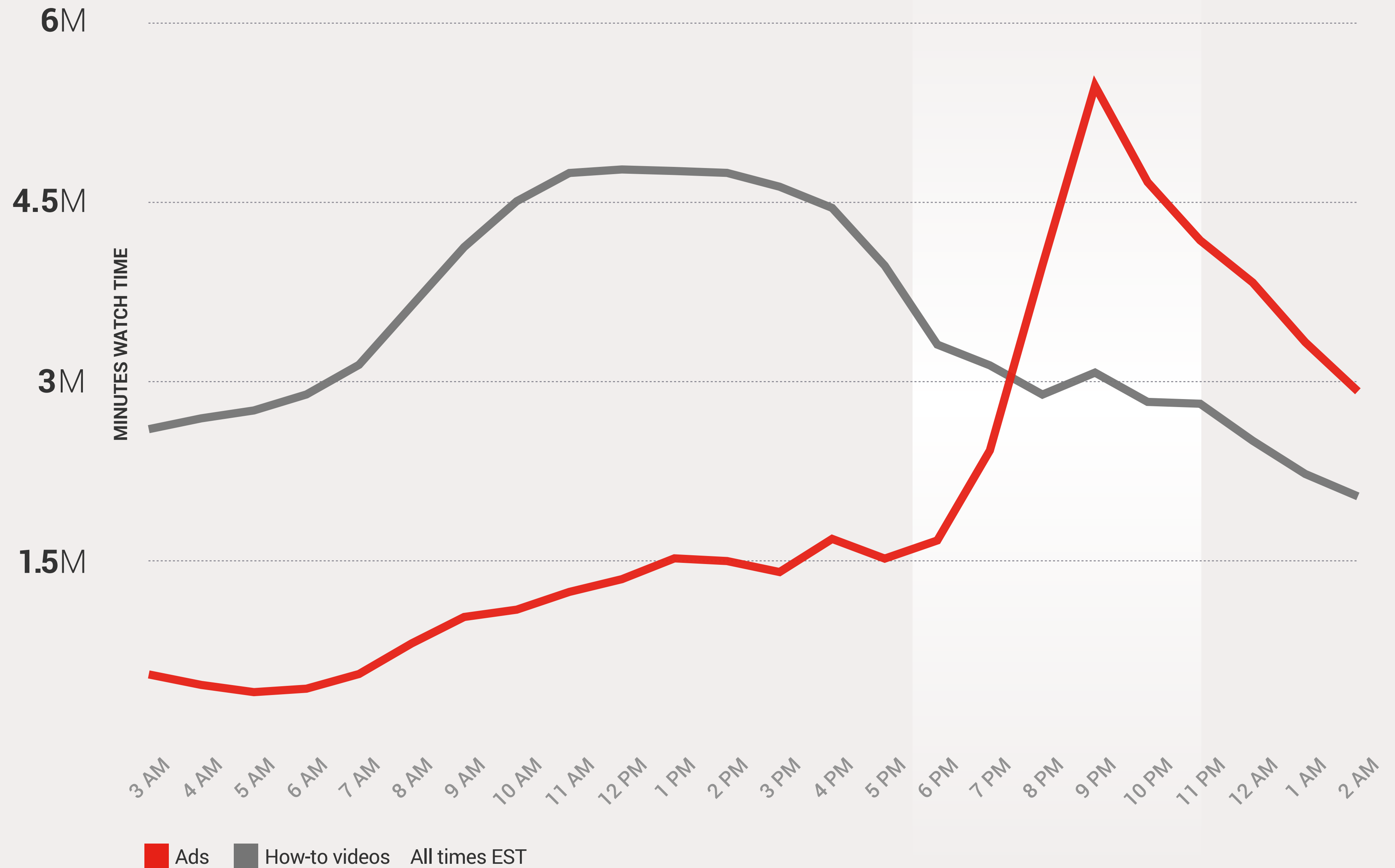


YouTube data, January–February 2015, global. Classification as a "big game ad" was based on public data such as headlines and tags, and may not account for every big game ad available on YouTube.



Ad Watch Time During the Game

Consumers will often turn to YouTube while the game airs to rewatch their favorite ads. While the game is live (6–10 p.m. EST) over 300,000 hours of big game ads are watched on YouTube, surpassing well-known YouTube genres like how-to videos.



Source: YouTube data, February 1 2015, global. Classification as a "big game ad" and "how-to video" was based on public data such as headlines and tags, and may not account for every such video available on YouTube.

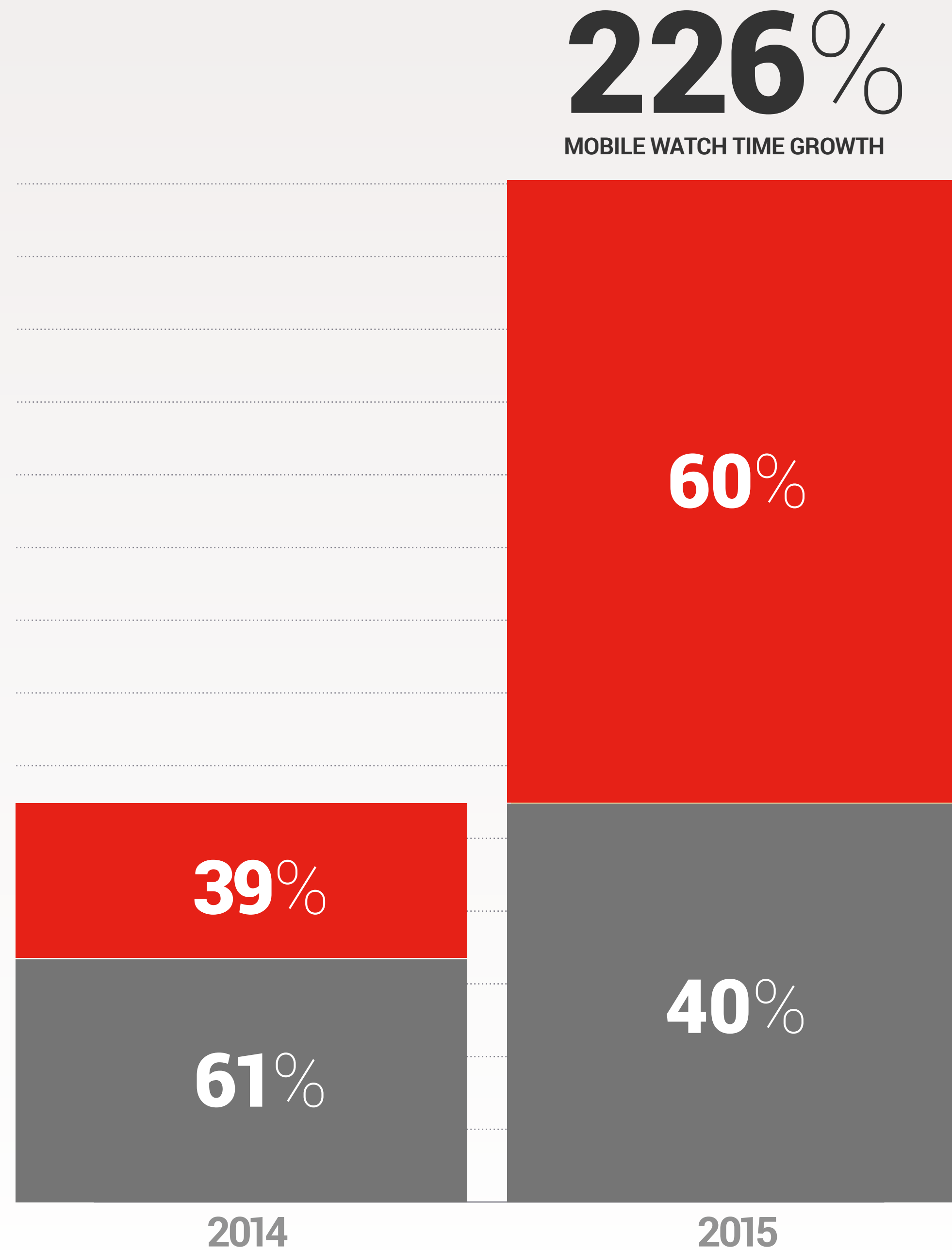


3. Mobile as the First Screen

Mobile is dominating the game, with ad watch time on mobile devices growing 226% year over year.

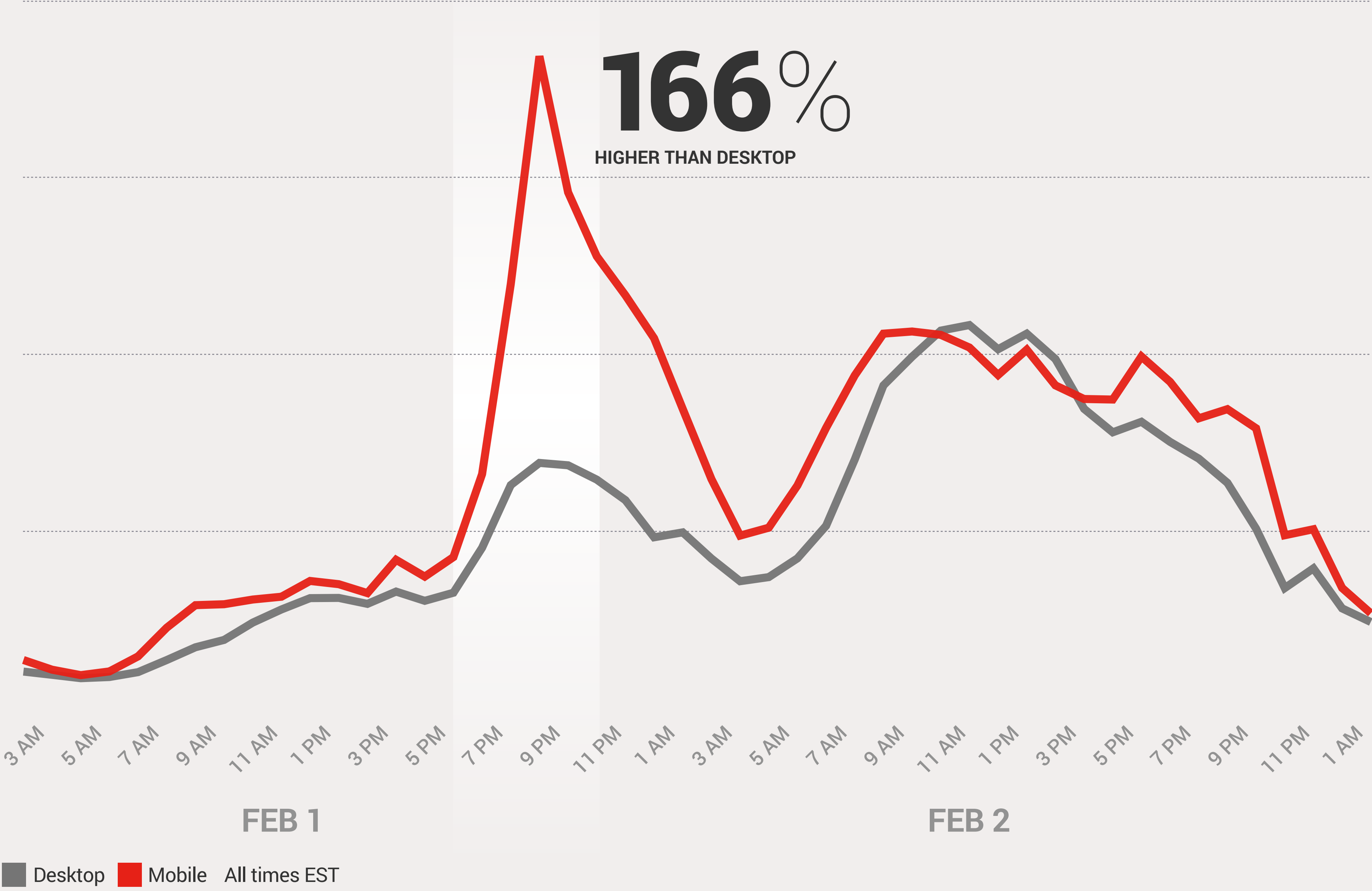
■ Desktop ■ Mobile

Source: Google data, 2014 vs 2015, global. Classification as a "big game ad" was based on public data such as headlines and tags, and may not account for every big game ad available on YouTube.



Mobile Trending

Mobile ad watch time spikes while the game is live, and peaks near the end of the game—166% higher than desktop watch time.

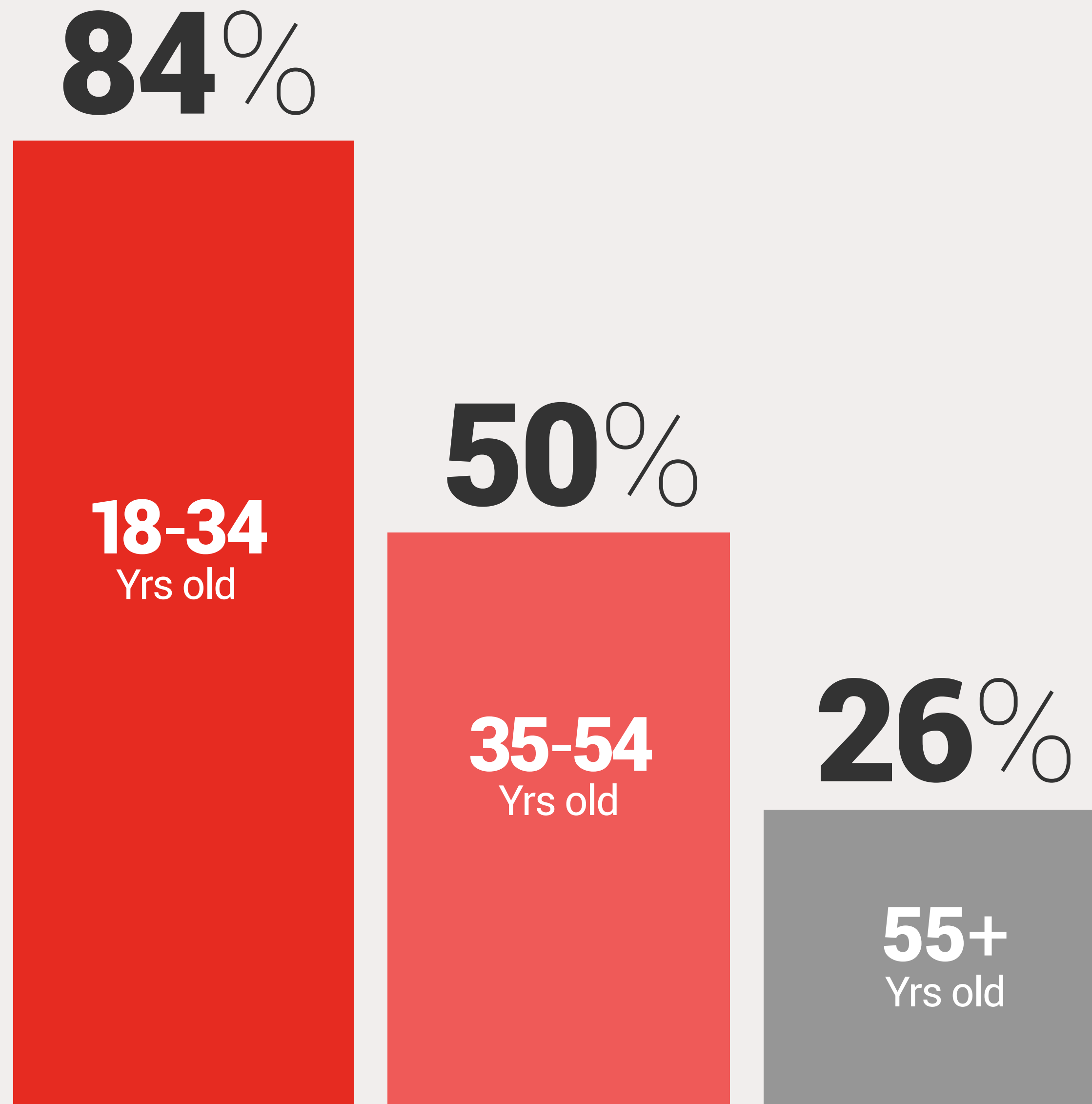


Source: Google data, February 1, 2015–February 2, 2015, global. Classification as a "big game ad" was based on public data such as headlines and tags, and may not account for every big game ad available on YouTube.



Mobile Usage by Age During the Big Game

84% of millennials use their smartphone while watching the big game—significantly higher than other age groups.



Sourcing: Q: Do you ever use a smartphone while watching the Super Bowl?, Google/Ipsos MediaCT, November 2015, n=2,014, U.S. online respondents 18+ representative of the online population.

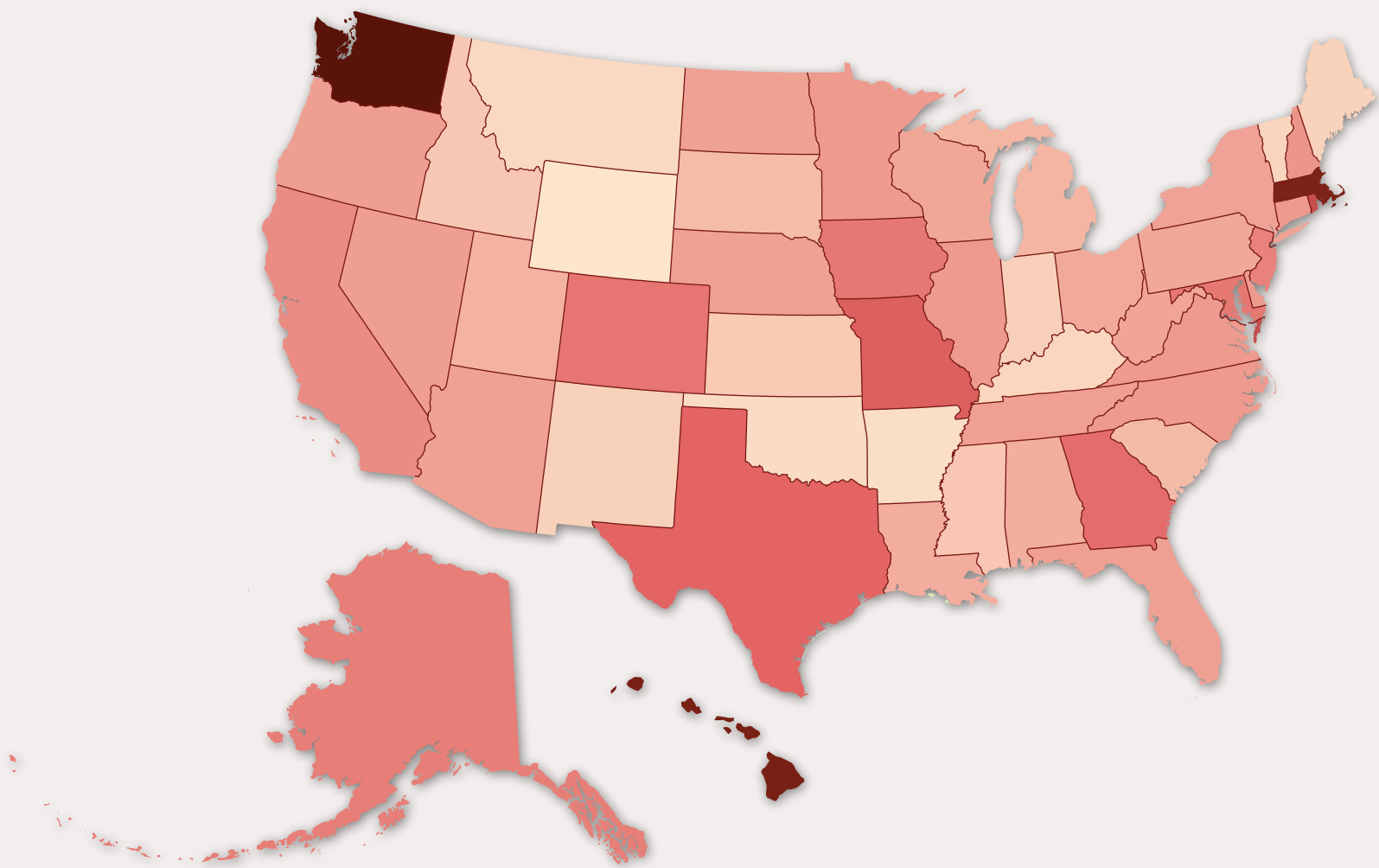


Football Content vs. Big Game Ads

In 2015, audiences in the Midwest were among those most interested in watching big game ads. But the home states of the teams that faced off—Massachusetts and Washington—saw the highest watch time for football content.

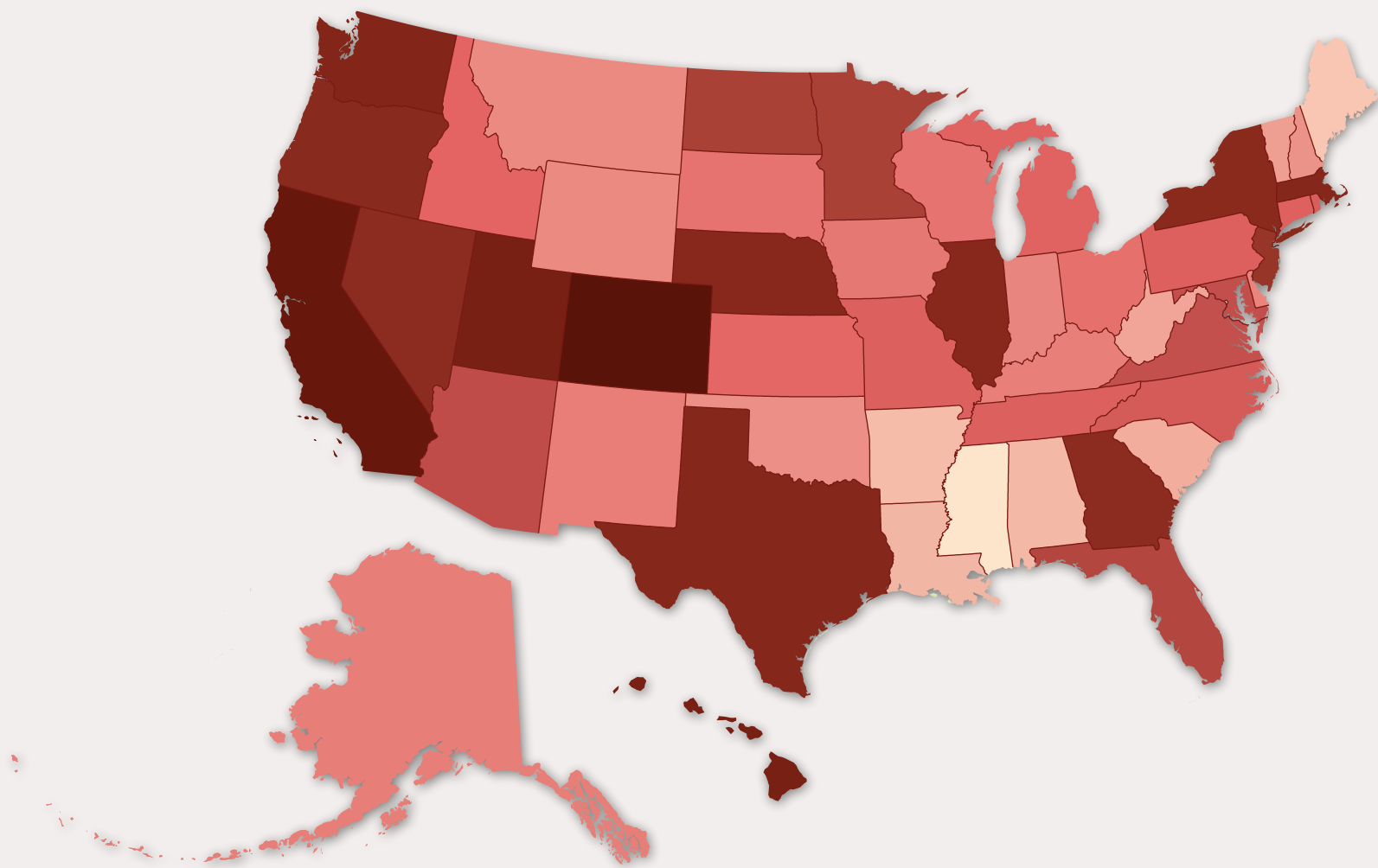
Football content was most watched last year where the two winning teams lived—Massachusetts and Washington—2X as much as the average state.

WATCH TIME ACROSS THE COUNTRY



2015 Top 5 States for Football

- Washington
- Massachusetts
- Rhode Island
- Texas
- Hawaii



2015 Top 5 States for Ads

- Colorado
- California
- Hawaii
- Utah
- Washington

Google data, January–February 2015, global. Classification as "football-related content" or a "big game ad" was based on public data such as headlines and tags, and may not account for every big game ad available on YouTube.



