

YOUTUBE: A CLOSE-UP VIEW OF AN ILLUSIONARY GIANT

For no other media is the divide between perceived and actual market size greater than for YouTube. An overview of the facts in Germany.

After listening to or reading the many supposed experts or trade journalists (who should really know better), you could be forgiven for thinking that YouTube is the new yardstick in the world of moving images. Yes, the new challengers to established TV providers market themselves as very clever and self-aware, however, many industry insiders are above-average users of non-linear

providers and at the same time watch TV significantly less often than the average. In this regard, they make conclusions on the rest of the country based on themselves - only human, but unfortunately fundamentally flawed.

With this in mind, it is important, if difficult, for TV marketers, to combat this with sound facts. In reality, YouTube is rather more similar to Mr. Tur Tur from Michael Ende's German children's book "Jim Button" - a character who appears to be a giant from afar. The closer the enormous-looking giant comes, the more he shrinks to a normal size.

YouTube is without a doubt a relevant media, although its use and significance for different target groups varies enormously, with the lion's share of use clearly coming from a very small group of heavy users. YouTube neither plays in the same

league as first and second generation linear television broadcasters, nor is the platform able to significantly increase its incremental net coverage figures over the course of an average month to the level of an ad-funded TV broadcaster. ■



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Sources:

- ¹GfK/Google MEP, Q1/2014, IP Deutschland analysis
- ²IP Deutschland model calculation, based on figures from AGF/GfK, Comscore and YouTube
- ³YouTube, "Global YouTube Audience Study" 2013, results for Germany
- ⁴SevenOne Media/Horizont of 22/04/2014
- ⁵YouTube TrueView, Quisma
- ⁶IP Deutschland, AGF/GfK, VuMA, IP Fourscreen Touchpoints
- ⁷GfK/Google MEP, Q1/2014, IP Deutschland analysis; IP Fourscreen Touchpoints).



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1.

Illusionary giant I:

Believe it or not, over an average month, YouTube does not reach half of all Germans at least once.¹

2.

Illusionary giant II:

Unfortunately there is still no common, directly comparable audience measurement for TV and YouTube & Co. Nevertheless, they can be compared in terms of figures using fair estimates. According to our calculations, YouTube would today, if it was a television broadcaster, have a market share of approximately 1% of the total audience and perhaps 2 to 3% of young viewers.²

3.

No paradigm shift:

76% of YouTube users do not agree with the statement "YouTube is more important than television for my generation".³

8.

Apparent measurements:

In GfK and Google's Media Efficiency Panel (MEP), TV use was only depicted in a rudimentary way. If we transfer the MEP framework parameters we are aware of (basis: only online, depiction of only 11 channels, analysis only of 6 a.m. to 1 a.m., no delayed use etc.) to the AGF/GfK market comparison, our calculations show that up to 40% of TV service is missing as documented by the AGF/GfK panel. All TV figures from the MEP must therefore be viewed with a critical eye.

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YOU SHOULD KNOW
ABOUT THE REAL
SIZE OF YOUTUBE

4.

Super-heavy users:

79% of total YouTube use is accounted for by only 15% of all users. "Normal" users, on the other hand, watch occasionally and for short periods of time.⁴

7.

Barely incremental net coverage figure:

The exclusive net coverage figure YouTube can reach over linear commercial television averages only approx. 1 to 3% per month depending on target group.⁷

6.

Apparent target groups:

YouTube users are generally also TV watchers and vice versa. They therefore do not form an independent target group, and certainly not one that can no longer be reached via television in general.⁶

5.

Advertising unwanted:

Video contact is not equal to ad contact, as 78 to 96% of all TrueView ads on YouTube are skipped by users.⁵