

2014

Top 500 Brands on YouTube

The Top 500 Brands on YouTube have grown average monthly views by nearly 70% in the past year

SUMMARY STATS FOR TOP 500 BRANDS

722 million

Total Monthly Views

1.4 million

Average Monthly Views

41 million

Total Subscribers

82,000

Average Subscribers

136,000

Average Views Per Video

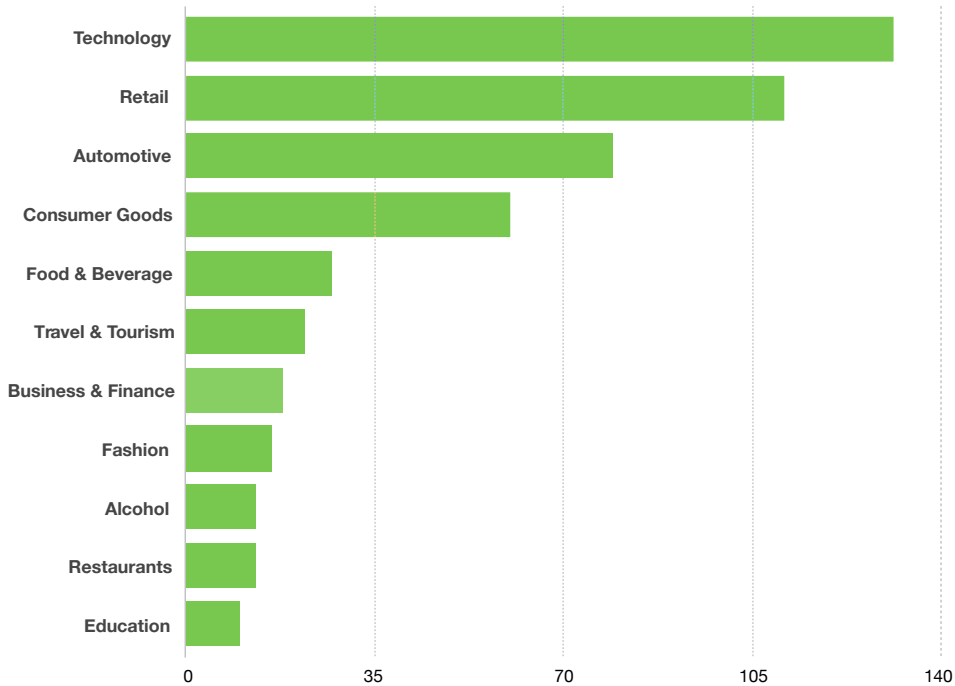
In our second annual report about the top brand channels on YouTube, there is no mistaking the macro trend: Brands are increasing their commitment to marketing on YouTube and recognizing a substantial return.

Our report analyzes OpenSlate data on the Top 500 non-entertainment brands on YouTube. These are marketers who aren't typically required to be in the content creation business by nature, but have chosen to do so largely based on the "earned media" opportunity offered by YouTube and its monthly US audience base of more than 120 million.

The most successful brands in our report have adopted audience development strategies employed by the most successful YouTube channels overall: They're consistent, on brand and very focused on growing their YouTube subscribers. As a result, the Top 500 brands on YouTube have seen their average subscriber base skyrocket from 37,000 to more than 82,000 in the past 12 months.

Top 500 Brands selected based on OpenSlate data, week of March 24, 2014, and *excludes* Entertainment category brands.

The Top 500 Brand Channels by Industry



Our top three marketer categories – Tech, Auto and Retail – account for nearly two-thirds of the Top 500 channels. There are 131 channels in Tech alone, with Google accounting for 24 of them, including successful channels for Chrome, Mobile, Developers, Glass and a recruiting channel called *Life at Google*.

Samsung boasts 17 channels in our Top 500 report – the second highest for a single brand – with their main mobile channel clocking in at over 800,000 subscribers alone.

The top 5 brands in each category typically account for 50% of the measured category overall. They are listed below, in order of subscribers.

TOP 5 BRANDS IN EACH INDUSTRY

By Subscribers

Alcohol

Budweiser
Corona (Music)
Heineken
Bud Light
Dewars (India)

Automotive

Audi
BMW
Chevrolet
Mercedes-Benz
Ford

Business & Finance

SpaceX
Boeing
Geico
GE
Lockheed Martin

Consumer Goods

Luxy Hair
Old Spice
Orabrush (CureBadBreath)
Real Techniques
L'Oréal Paris (Spain)

Education

TED Talks (Director)
Stanford University
NASA (Explorer)
Harvard
Harvard Business

Fashion

CHANEL
Dior
Burberry
Ford Models
Louis Vuitton

Food & Beverages

Red Bull
Pepsi
Monster Energy Drink
Coke (StudioAtMTV)
Coca-Cola

Restaurants

Burger King
Starbucks
Chipotle
McDonald's
Taco Bell

Retail

Nike (Football)
DC Shoes
Blendtec
Victoria's Secret
LEGO

Technology

Google
Apple
GoPro Camera
Samsung Mobile
Google Chrome

Travel & Tourism

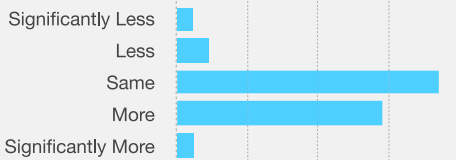
Disney Parks
LonelyPlanet
Downtown Dubai
Turkish Airlines
WestJet

The huge success of TED Talks in the context of our Education channels (just 10 of the Top 500) drove that industry to the top spot for average subscriptions. With over 2.2 million subscribers, TED ranks third overall for this metric in our report.

The Food & Beverage category dominated view counts in early 2014, with a combination of sustained momentum from omnipresent players like Red Bull and excellent campaigns from the likes of PepsiMax (feat. Jeff Gordon) and Lipton Tea (feat. The Muppets).

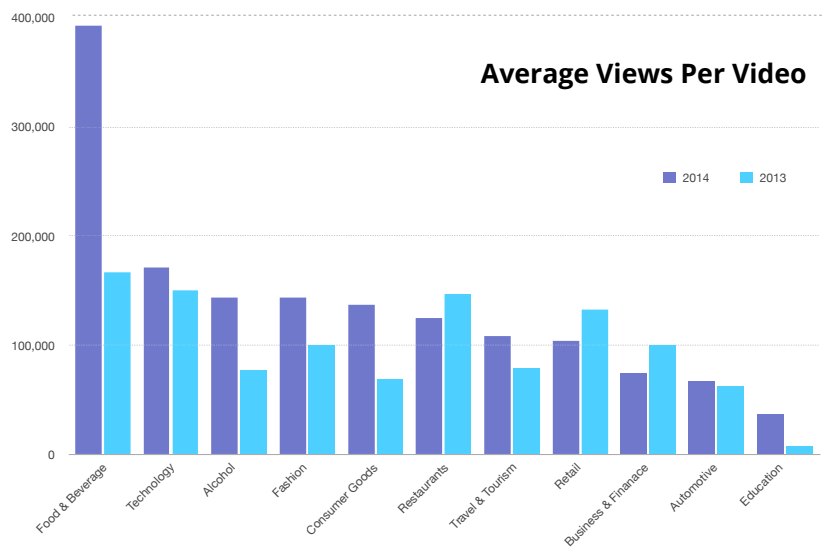
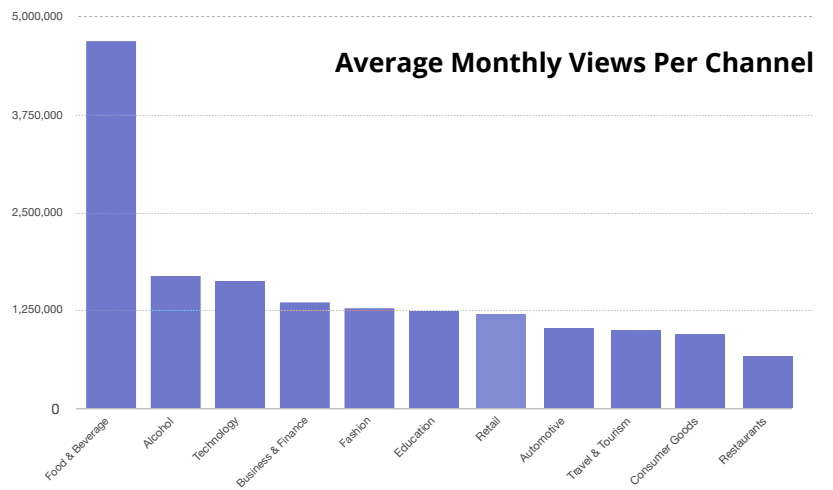
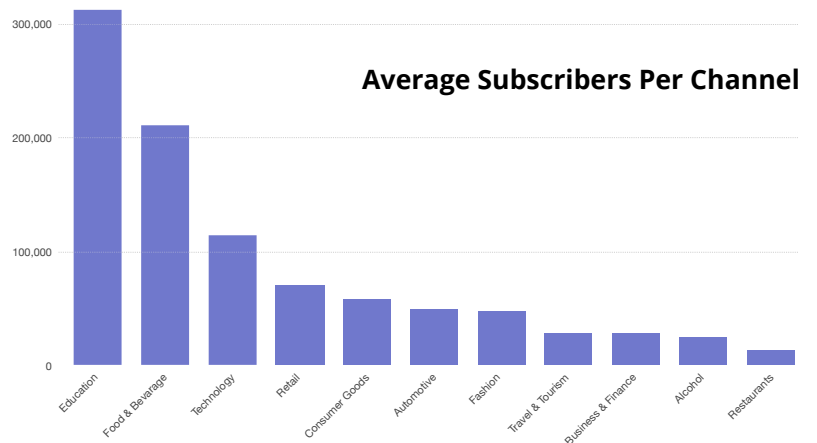
YOUTUBE MEDIA BUYER SURVEY

In a survey of 313 online media planners and buyers conducted between March 6 and March 22, 2014, 208 had planned or bought media on YouTube in the past 12 months. Of those buyers, 41% planned to increase their YouTube spend in the next 12 months.



Consistent with a sales strategy that appeals to Television budgets, YouTube media buyers were **49% more likely to claim that their online video dollars were transitioning from traditional TV budgets.**

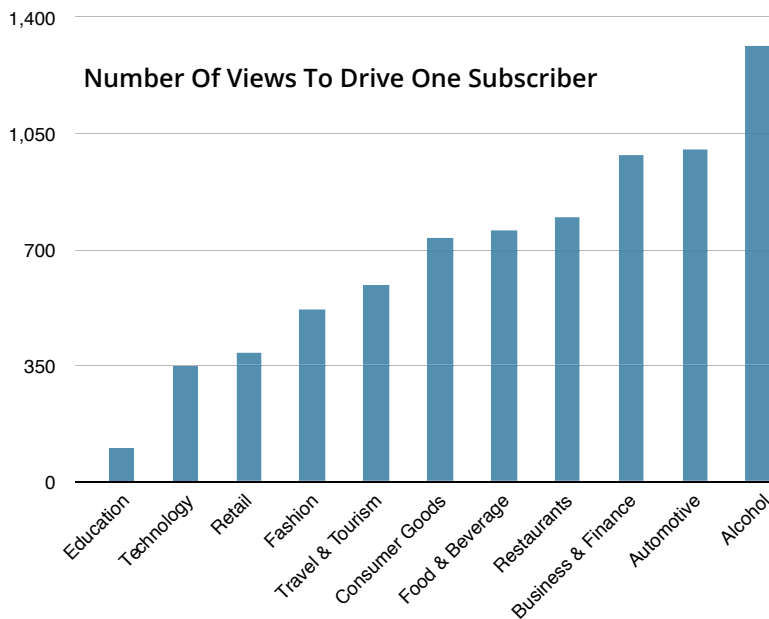
Our online survey was conducted between March 6 and March 22, 2014, and included 208 completed responses from US-based individuals who have been directly involved in the planning or buying of YouTube media in the past 12 months. Of those respondents, 96% are employed by ad agencies, and more than 60 individual agencies were represented in our results.



Converting Views to Subscribers

Like any social network, YouTube offers brands the opportunity to convert a view to a connection – one that will see the brand and its content more frequently and reliably in their future YouTube experience. While views can be bought using YouTube’s highly effective TrueView ad unit, subscribers must be earned. And doing so is a science mastered by every successful channel on the platform.

The most successful content channels on YouTube overall convert views to subscribers at a rate of 0.5% meaning, on average, every 200 views results in a new subscriber. Brands are far less successful in this endeavor, generally needing close to 750 views to draw just one new subscriber. There are many factors working against brands in this regard, including an inconsistent content and publishing strategy and the likely impression by a viewer that whatever drew them to the brand’s content in the first place will not be repeated. A high percentage of TrueView driven (paid) views by brands also has a large impact.



Shortcomings aside, one real driver of this discrepancy may simply be that brands haven’t found enough utility in their YouTube subscriber base. Compared to a Facebook friend or a Twitter follower, YouTube channels are offered no direct or targeted connection to their subscribers. Since brands are concerned with selling product or service, and not ads on their YouTube channel, there’s a completely different value proposition at work on this front.

YOUTUBE MEDIA BUYER SURVEY

Paid Media Subscriber Growth

In a recent survey of more than 200 YouTube media buyers, we found that adding subscribers to a brand’s channel page was rarely a priority:

Is YouTube Subscriber Growth a KPI when you buy media on YouTube?

Yes **20%**

No **80%**

However, buyers that do consider subscriber growth an important KPI are

4x more likely

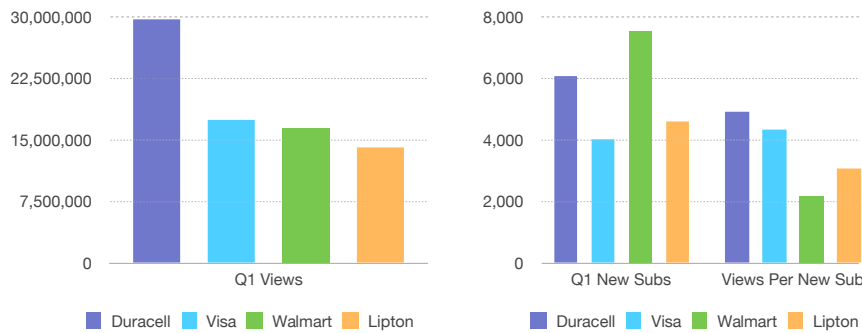
to develop ad creative especially for their YouTube media buys. They’re also

26% less likely

to demand audience guarantees from comScore or Nielsen.

Missing an Opportunity

With a combination of beautiful campaigns, viral success and big media budgets, Duracell, Visa, Walmart and Lipton cut through the clutter to deliver big views in Q1.

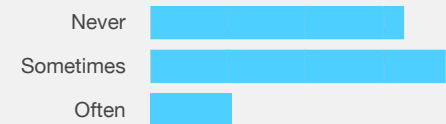


But these same four brands pulled up well short of the *potential* of that success, converting views to subscribers in the bottom 1% of our study.

YOUTUBE MEDIA BUYER SURVEY

YouTube Content Strategy

Just 13% of YouTube media buyers in our survey “often” create content specifically for YouTube campaigns.



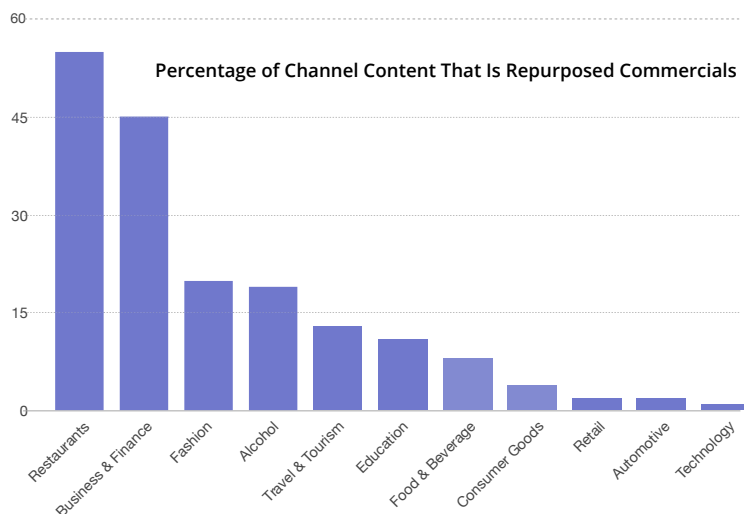
But those buyers were

2x more likely

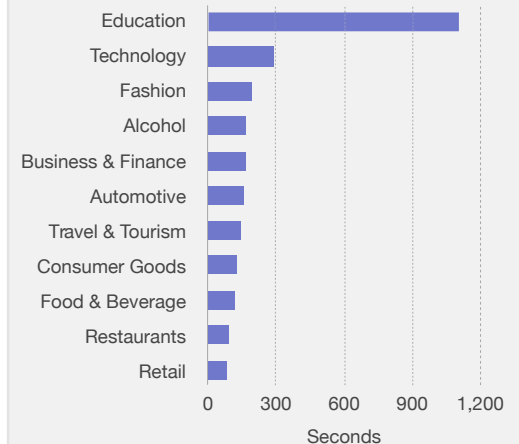
to increase their spend with YouTube in the next 12 months.

Repurposed TV Commercials

Our survey of YouTube media buyers found that 33.2% “always” repurpose TV commercials in their YouTube media buys. These repurposed commercials often represent a significant amount of the overall content on a brand’s channel page.



Average Video Length by Industry



The **SlateScore** measures quality and is calculated from data about a channel's Engagement, Consistency, Influence, Momentum and Reach.

Audi of America

SlateScore: **574** Monthly Views: **881K** Subs: **63K**

Challenger brand no more. Audi (U.S.) introduced the "Stay Uncompromised" A3 campaign in Q1 2014 with the help of Doberhuahua and brand endorsers like actor Ricky Gervais, chef David Chang and boxer Claressa Shields. The luxury auto brand has maintained a consistent and engaged audience and it's clear they're committed to creative and original content.

Target

SlateScore: **563** Monthly Views: **429K** Subs: **24K**

Just like its stores, Target's YouTube channel has something for everyone. The American retailer repurposes commercial spots, which boosts channel views, but they don't rely on these ads alone. Target's content includes instructional beauty and DIY style features, how-to home decorating and entertainment tips, plus music and movie content. A playlist dedicated to its Spanish-speaking audience shows a brand that is in tune with its digital audience.

Dell

SlateScore: **523** Monthly Views: **809K** Subs: **31K**

Some of the best technology brands on YouTube blend storytelling alongside promotional product videos and the PC giant does just that with its recent "Beginnings" campaign focused on reinvention. The Dell Vlog channel organizes content into playlists of industry events, product launches, case studies and an entrepreneur help center. Dell's consistent publishing keeps its 30,000+ subscribers engaged and returning for more inspiration.

The North Face

SlateScore: **556** Monthly Views: **1.33 MM** Subs: **44K**

The North Face Video channel has amassed a following on YouTube by appealing to outdoor enthusiasts and weekend warriors while capturing extreme athletic endurance feats and the training it took to get there. The high-quality content is grouped into playlists around series focused on one sport and/or location. While this type of publishing (and content) does not lend it self to consistency, The North Face has an influential channel thanks to its adventurous appeal.

Cover Girl











SlateScore: **546** Monthly Views: **2.1 MM** Subs: **25K**

Beauty brand Cover Girl engages make-up enthusiasts with their how-to, beauty tips, and DIY content. The Procter & Gamble brand has ambassadors including Ellen DeGeneres, P!NK, Katy Perry and Sofia Vergara to help spread the message of female empowerment in its "Girls Can" campaign, and they have also recognized Seventeen Magazine's Beauty Smarties as instructional content collaborators for their younger audience.

Top 10 Brands by SlateScore

TOP 500 BRANDS
ON YOUTUBE

OpenSlate is a video analytics platform that tracks more than 160,000 ad-supported channels on YouTube and measures their ability to attract and engage an audience. Our data about quality, brand safety and subject matter expertise is used by brand marketers to target the most effective and appropriate YouTube inventory at scale. For more information, visit: openslatestudios.com.

	781	Red Bull	8.6 ENGAGEMENT	7.8 CONSISTENCY	9.7 INFLUENCE
	737	TED Talks (Director)	7.6 ENGAGEMENT	7.8 CONSISTENCY	9.6 INFLUENCE
	728	GoPro	8.6 ENGAGEMENT	7.6 CONSISTENCY	9.4 INFLUENCE
	692	Luxy Hair	8.1 ENGAGEMENT	7.3 CONSISTENCY	9.3 INFLUENCE
	683	Samsung Mobile	8.1 ENGAGEMENT	7.6 CONSISTENCY	8.5 INFLUENCE
	671	Coca-Cola	8.5 ENGAGEMENT	7.6 CONSISTENCY	9.1 INFLUENCE
	666	Nike (Football)	7.1 ENGAGEMENT	7.5 CONSISTENCY	9.4 INFLUENCE
	663	Victoria's Secret	7.1 ENGAGEMENT	7.7 CONSISTENCY	9.3 INFLUENCE
	655	Pepsi	7.4 ENGAGEMENT	7.3 CONSISTENCY	9.3 INFLUENCE
	647	Nokia	7.2 ENGAGEMENT	6.9 CONSISTENCY	9.3 INFLUENCE

The SlateScore™ is on a scale from 1-1000 with higher being better. Scores of 500 or higher are in the top 7% of all channels in OpenSlate.

Engagement, Consistency and Influence are calculated on a scale of 1-10 with higher being better.