



Why We Watch 2.0

Beyond The Frame:
How viewers perceive
content quality





About Why We Watch

We love watching online video because the content feels like something that belongs to us.

That was the conclusion of *Why We Watch: Co-creating Culture*, an investigation into the psychology of audio-visual media consumption we published last year. That report looked into the underlying neuroscience, revealing insights into everything from the psychological motivations that drive viewing behaviour to viewers' feelings about the economic model that supports the creative ecosystem. And now we're back with fresh research, exploring the relationship between content quality and emotional impact, and showing why YouTube is a great place for advertisers to connect with a receptive audience.



Introduction

Recent years have seen a significant shift in the media landscape. Traditional gatekeepers have had to move over and make room, with viewers now having an equal seat at the table, setting the course of popular culture as they search, subscribe, comment, and ultimately curate their own personal media universes.

We choose what we want to watch based on age-old desires: to feel connected, informed, entertained, or relaxed. But we also want to see quality. **Quality is a critical variable in media. It's what makes the difference between time that feels wasted and time well spent.** It isn't always an easy thing to define, but we seem to instinctively know it when we see it. And when we find quality content, we tend to want to spend more time watching it, making the platforms that provide it even more valuable.

Over time, the amount of content available to viewers has skyrocketed. There are now more channels, more talent both behind and in front of the camera, and more opportunities for people from diverse backgrounds to tell their own stories.



In the past two decades, platforms like YouTube have democratised content production and distribution for individuals, independents, and media companies alike. This has exponentially increased the content available with a new generation of creators empowered to make video content across a vast range of subjects. In 2023, more people created content on YouTube than ever before,¹ and at any given time, countless new ideas are emerging on the platform, meaning there really is something for everyone.



“On a big scale, creators are directors and producers, but on a small scale, it can be any of us. We are all walking around with cameras in our pockets. The times have changed with YouTube and smartphones.”²

While marketers could once keep track of everything on the broadcast schedule, it's now impossible to stay ahead of every new trend and episode, let alone the full breadth of content being viewed. So in this report we want to suggest an alternative. The YouTube content library is vast, and getting bigger every minute of every day. But while the content itself is endlessly diverse, our research shows strong commonalities between viewers in how they react to factors such as creator authenticity, relatability, and technical skill. In a world where the audience calls the shots, understanding how they think about quality is essential for marketers who want to find broad, suitable coverage.

Content quality has traditionally been assessed on purely technical or financial criteria. Good visuals, booming sound, big budgets, and a star-studded cast. But new creators, devices, and viewing experiences have flipped all of that on its head. Smartphones and other low-cost tools have made the technical bar far easier to reach — a trend that AI tools are already accelerating. And beyond that technical baseline, there's now a host of additional factors that influence perceptions of quality. The time is right for marketers and creators to understand these new factors and how to leverage them, especially as opportunities in traditional media become more scarce and expensive.³ So in this report we're going to home in on a question we think is increasingly vital for everyone involved in online video:

How has the diversification of content changed the way viewers perceive content quality and value?

What is quality?

To begin with, let's state the obvious: quality is subjective. But while it might be tempting to leave it at that, there's plenty more to say.

Quality is a compound, made up of many different value judgments. How we assess content depends on criteria that are individual to each of us: we might be drawn in by the performances, the people, the plot, the special effects, or the music. Likely, it's a combination of all of these — and more — that reflects our unique preferences.

Further complicating matters, these criteria evolve as new technologies and trends emerge. Consider the early days of cinema: the introduction of both colour and sound fundamentally reshaped audience perceptions of quality. Similarly, the emergence of photorealistic CGI in films like "Jurassic Park" and "Independence Day" had a significant impact on moviegoers' expectations from the 1990s onwards. But a note of caution: technical innovations don't always move the quality needle with viewers, as electronics brands found out with 3D TVs a decade or so ago.

High-definition phone cameras, cheap audio equipment, and platform-provided tools have all lowered barriers for independent creators, **but the emergence of online video is categorically not just a story about technology.** Viewers and creators now forge bonds on platforms like YouTube that were unimaginable in the era of passive media consumption. Today's fans aren't simply watching; they're engaging in direct, collaborative relationships with the creators they admire.

Once we start thinking about quality as more than just audio-visual fidelity, some recent media trends start to make sense. Recently, and for the first time in over a decade, a prominent cinematic universe saw less-than-heroic returns at the box office. Elsewhere, numerous big-budget movies and shows have failed to connect with audiences on streaming platforms.

Likewise, the fall of prime-time or appointment viewing on TV speaks to the declining power of schedulers to set the viewing agenda, in favour of a shift towards viewer convenience and agency. Of course, there are numerous other factors that play into the success of any given piece of content, such as rising subscription costs and platform accessibility (the enduring negative effect of COVID-19 on cinema admissions is just one example). But beyond this, what's clear is that viewers can feel when something is missing from even the highest profile productions, and our research suggests it probably has little to do with the number of explosions or effects shots. Of course, cultural touchstones like "Barbie" and "Oppenheimer" still resonate and inspire passionate engagement, and that's pretty much the point.



Technical excellence helps to sell the story, but only if the story is worth telling. And the stories we want to be told have human connection at their core.

Quantifying emotional engagement isn't easy — not compared to counting camera angles or tallying cost per episode — but we're going to give it a try. For the first time, we'll be sharing insights from a brain imaging study, focused on memory creation and other neural activity, as well as surveys, interviews, and literature reviews conducted by our research partners at MTM, The Behavioural Architects (TBA), and Neuro-Insight. Together, this new body of data and analysis will illustrate the remarkable bond that exists between video creators and their audiences, and why this relationship makes their content so valuable.

The death of the watercooler

The media we consume is governed by our individual tastes and interests, but our research suggests that watching high-quality content can ultimately contribute to a sense of something greater. **Across all platforms, more than half of viewers agree that their content selections collectively create a sense of belonging,**⁴ while a majority of younger viewers say that watching content on platforms like YouTube and Twitch makes them feel seen and understood.⁵ Surprisingly, the platform least likely to make people feel this way was broadcast media. With only slightly more than a third of viewers saying that TV makes them feel part of something bigger,⁶ the days of appointment viewing may already be behind us.

55%

of viewers agree that the content choices they make collectively create a sense of belonging⁷

In contrast, YouTube viewers excitedly count down to new episodes, rewatch old ones, and typically rush to their favourite channels in the 24 hours after new content is released. For just one example of this, consider former NASA engineer Mark Rober, who posted a video last year about the science behind wiffle ball.

The video received 5 million views in its first 24 hours, going live on the same day as the much-lauded “Succession” series finale, which drew 2.9 million viewers when it premiered on HBO.⁸ The sheer regularity of moments like this on YouTube presents an ideal opportunity for brands to engage.

A circular inset image shows two young women lying down, smiling and taking a selfie with a smartphone. One woman has blonde hair and is wearing a yellow sweater, while the other has brown hair in a bun and is wearing a grey shirt. A large, glowing pink sphere is positioned to the left of the women. The background of the entire page is a gradient of pink and purple.

CHAPTER

01

CONNECTING WITH EMOTION

Chapter 01

Connecting with emotion



Creators have always been storytellers. But the rise of open platforms has brought a new emotional immediacy to audio-visual media, changing many storytelling rules in the process.

That openness not only allows for new forms of storytelling, easy dialogue, engagement between creators and users, and creative experimentation at a huge scale. It also allows new talent and new voices to emerge – voices that always deserved a stage, but back in times past would never have had a chance. As a result, user expectations of video in general have been transformed, with viewers demanding more than just superficial markers of quality.

A study with 12,000 video viewers conducted for this report shows that emotional aspects are, in fact, valued even more than technical markers. But the overwhelming majority expect the content they watch to exhibit both, with over 90% of respondents saying that high-quality content needs to deliver on both a technical and emotional level.⁹

Emotive markers

High-quality video content means it has emotive markers of quality

96%

People who feel emotive markers are the only indicators of quality: 5%

Technical markers

High-quality video content means it has technical markers of quality

92%

People who feel technical markers are the only indicators of quality: <1%¹⁰

Markers of quality

Emotive markers of quality

High-quality content means content that ...

- Captures my attention throughout
- Tells a compelling story or narrative
- Is original or creative, or offers a unique perspective
- Teaches me something new or useful
- Really means something to me personally
- Enhances or helps me in everyday life
- Is relevant to my interests and preferences
- Is authentic and relatable
- Helps me reflect or clarify my thoughts
- Is emotionally engaging

Technical markers of quality

High-quality content means content that ...

- Has clear visuals and good audio
- Exhibits technical excellence in terms of camera work, editing, aesthetics, and overall production
- Includes features (such as video filters) or elements that set it apart from content without these features

Where once people might have looked forward to the next big special-effects bonanza, our data suggests that the number of viewers who only care about visuals is now vanishingly small, at less than 1%.

Audiences have come to crave a deeper connection with the content they consume, and even the most traditional media has had to adapt. Vogue’s makeup tutorials on YouTube are filmed in celebrities’ own homes with minimal gloss and editing, offering a level of authenticity and access that was previously unthinkable. And even a genre as enduring as true crime has felt some of this influence, with the intimate, first-person storytelling of podcasts bleeding through into streaming documentaries like “Burden of Proof” on HBO Max and “The Octopus Murders” on Netflix.

This hunger for connection is evident in the responses to our survey of video viewers in EMEA. Overall, 86% of viewers agreed that high-quality content is emotionally resonant. And when we drill down further, the specific emotional characteristics people are looking for show a high degree of consistency, with 91% agreeing that high-quality content should be meaningful, and 90% agreeing that it should be relevant and relatable.¹¹

High-quality content means content that is ...¹²
% among weekly users who were asked about the service (Top 2 box: Strongly/Slightly agree - closed-ended answer list)



Looking at this question along age lines does reveal some generational differences, despite high aggregate scores across the board. **All viewers agreed that the most important emotional marker is that content should capture and hold attention. But beyond that, viewers older than 35 valued trustworthiness and compelling storytelling, while younger viewers prioritised creativity and personal relevance.** The capacity to teach viewers something new or useful was ranked similarly for both groups, falling just outside the top five for older respondents.

High-quality video content means content that ...¹³
% among all respondents (Top 2 Box: Strongly/Slightly agree - closed-ended answer list)

Top 5 quality markers among 18-34-year-olds

Rank	Statements
1	[Technical] Has clear visuals and good audio
2	[Emotive] Captures my attention throughout
3	[Emotive] Is original or creative
4	[Emotive] Is relevant to my interests
5	[Emotive] Teaches me something new or useful

Top 5 quality markers among 35+-year-olds

Rank	Statements
1	[Technical] Has clear visuals and good audio
2	[Emotive] Captures my attention throughout
3	[Emotive] Provides accurate or trustworthy information
4	[Emotive] Tells a compelling story
5	[Emotive] Is relevant to my interests

In contrast, the responses around technical considerations revealed no such uniformity. While 86% of viewers said that clear visuals and good audio are essential for high-quality content;¹⁴ the numbers for other technical aspects were much lower, with only 54% valuing the use of distinctive visual effects.¹⁵ This reflects the reality that since good visuals and clear audio can now be achieved with nothing more than a mobile phone – without the need for expensive equipment or editing software – there’s no excuse for producing content that falls short. Viewers expect this as a baseline, and on YouTube **76% of people** said that content has clear visuals with good audio.¹⁶



The message is clear: viewers expect more. They want stories that capture their attention, that make them laugh, that relate to their lived experiences, or that simply move them. And this is really no surprise – as we’ll see later, content that engages our emotions can literally light up our minds.

Creating with trust

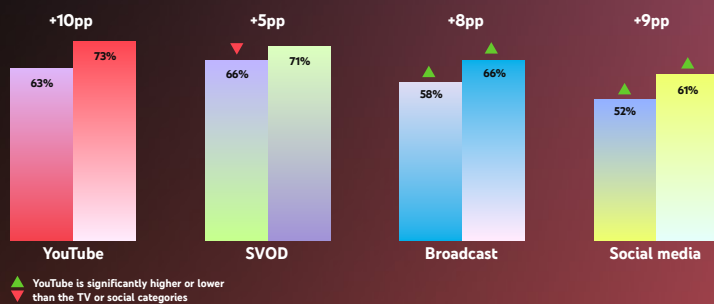
Our survey also highlighted an additional quality signal that is becoming increasingly important: trustworthiness. Across all platforms, 82% of respondents indicated that they expect high-quality content to be trustworthy.¹⁷ This finding underscores the growing significance of trust in the digital age, where misinformation and disinformation can spread rapidly.

When comparing different sources of video content, YouTube is ranked second for providing accurate and trustworthy videos, just behind SVOD platforms.¹⁸ Moreover, it ranked #1 for trustworthiness among younger viewers aged 18-34. In comparison, social media trustworthiness trailed behind that of all other platforms.¹⁹

One of the most surprising insights from these responses was a reported gulf in trustworthiness between digital-first channels like YouTube and SVOD, and broadcast media, with the latter lagging significantly behind. It may be that viewers prefer the less filtered immediacy of user-generated content over editorialised broadcasts from traditional outlets. However, more research is needed to uncover if this reflects a growing preference for on-demand news or a growing distrust of mainstream media.

Difference between video content in general (left) and high-quality video content (right) on this service²⁰
% among weekly users who were asked about the service (Top 2 box: Strongly/Slightly agree - closed-ended answer list)

"Provides accurate and trustworthy information"





CHAPTER

02

INVESTING IN EMOTION

Chapter 02

Investing in emotion

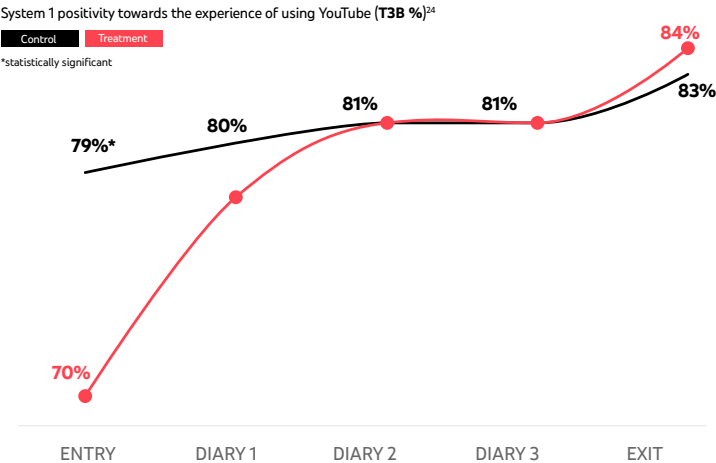


As viewers, part of our sense of ownership arises from the time and effort we invest in curating our personal media universes. But how does this translate into perceptions of quality? In our survey, 79% of viewers agreed that high-quality content means content that makes them feel like their time was well spent.²¹ And according to a survey by TBA/Cint, 60% of Gen Z in EMEA agree that the more effort they put into customising video platforms, the more quality content they get.²²

To further explore this hypothesis and to understand whether curation and ownership of content drives emotional investment, we conducted an experiment with 600 users. Half of the participants were asked to create a new YouTube account, which they used for the 2.5-week duration of the study. The other half acted as a control group by continuing to use their existing accounts. Surveys were conducted at regular intervals, digging into participants' behaviour, sentiments, and usage patterns.



To begin with, there was an immediate and significant difference between the level of positivity towards YouTube expressed by the control and treatment groups. **Positive sentiment among the treatment group who created new accounts was 9 percentage points lower than the control group. In other words, viewers didn't enjoy being evicted from their personal media universes!**²³



In this initial assessment, the treatment group also reported that content seemed less relevant to them,²⁵ and said that they found YouTube significantly less entertaining than the control group.²⁶ However, as the experiment progressed, the behaviour and responses of the treatment group soon began to change. They performed more searches, browsed more channels, and interacted more with suggested videos and comments compared to the control group. And as the algorithm learned their viewing preferences, the need for extensive searching decreased.²⁷ They began to perceive YouTube as more personalised and relevant, leading to increased enjoyment and a stronger desire to return to the platform.²⁸

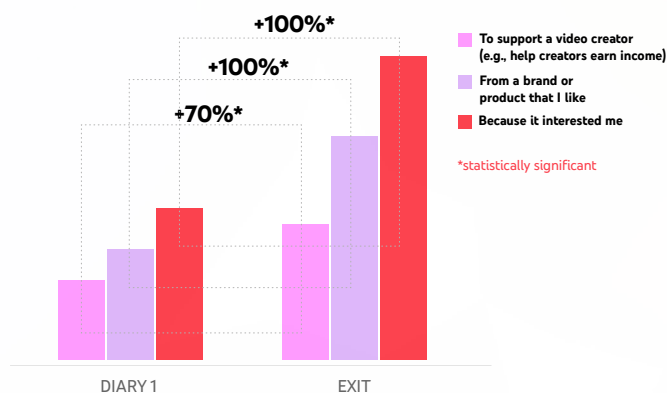
By the end of the experiment, both groups reported nearly identical levels of positivity toward YouTube. It took only one week for the treatment group's responses to reach parity with the control group. This remarkable turnaround, with the treatment group's positivity increasing by 14 percentage points from start to finish, underscores how intentional curation leads to improvements in overall experience.²⁹

From previous research, we knew that 58% of people say they want to support the creators they relate to by watching ads alongside their content.³⁰ So in this experiment we also looked at how participants' responses to advertising changed as they spent more time building out their new accounts.

And just as positivity and other sentiment scores improved, so did participants' willingness to support creators by viewing ads, increasing by 70% over the course of the experiment. Additionally, receptiveness to ads based on brand or product affinity, as well as general interest, doubled during the experiment.³¹

Treatment group: % difference between DIARY 1 and EXIT³²

I watched the ad ...



The fact that sentiment for both content and ads increases in lockstep as viewers invest time and effort in YouTube is good news for marketers. YouTube has billions of monthly logged-in users.³³ They are deeply engaged, and the more time they spend, the deeper that engagement becomes, as does their receptiveness to ads.



CHAPTER

03

BONDING THROUGH EMOTION

Chapter 03

Bonding through emotion



The more time users invest in curating quality content, the happier they are with their viewing experience.

That's because high-quality content is often emotionally satisfying, inspires trust, demonstrates relevance, and speaks to individual preferences. Meeting all of these criteria for a diverse audience is no small feat,³⁴ but the creator community regularly delivers all of this and more.



Millions of people are actively creating content on YouTube, helping to provide something for everyone, across every interest and every individual definition of “quality content”. The freedom to go deep on narrow subjects allows creators to produce content that truly connects with viewers on a personal level. And this dynamic is clearly something that viewers recognise and value, with 72% saying that their content choices collectively influence the new content that creators choose to make.³⁵ Moreover, younger viewers appear to have a significantly stronger perception of their role as co-creators, scoring higher than their peers aged 35+ across a range of questions related to how their content choices shape and enrich the cultural landscape.³⁶



“The content I connect most deeply with is when it relates to me or my interests. If the content is meaningful to me, it stays with me for longer than most videos.”³⁷

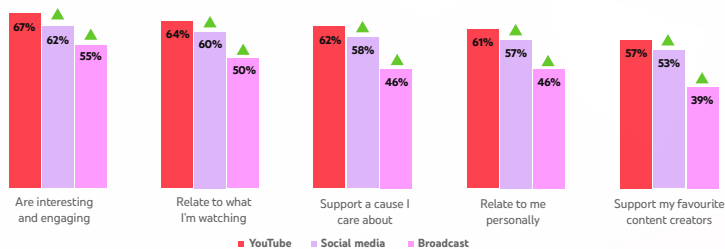
FEMALE, 25-34

The strength of relationship between creators and audiences is also reflected in how viewers respond to the economic models that support these platforms. **Viewers on YouTube were the most open to ads of all the platform types examined in our survey — as long as certain quality criteria were met. If advertising was interesting,³⁸ related to the content being watched,³⁹ personally relevant,⁴⁰ and supportive of either a favourite creator⁴¹ or cause,⁴² viewers were more likely to say they didn't mind ads on YouTube than on either social media or broadcast.**⁴³ This suggests that viewers are more accepting of ads when they have a function and purpose, and may be more receptive to advertising that meets their quality expectations around interest and relevance.

I don't mind adverts on this service if they ...⁴⁴

% among weekly users who were asked about the service
(Top 2 box: Strongly/Slightly agree - closed-ended answer list)

▲ YouTube is significantly higher than the TV or social categories



“Most of the time ads on YouTube don't really bother me at all. With some creators [...] I'll watch the ads because I want them to get the revenue and because I really appreciate the effort and time they put into their content.”⁴⁵

MALE, 25-34

How authentic content lights up our minds

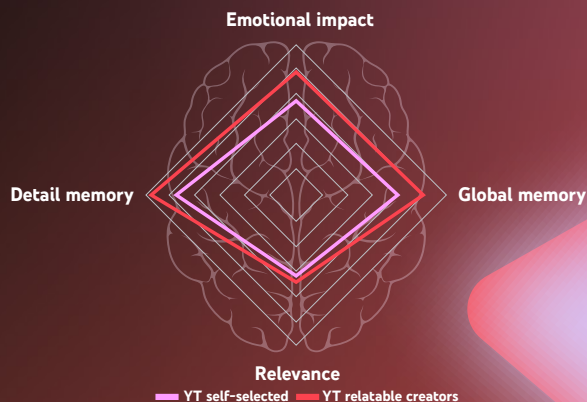
With such powerful sentiments at work, we wanted to understand more about what was going on beneath the surface. To do this, we undertook a brain-imaging study with over a hundred participants from the UK and Germany, led by Neuro-Insight, a leading neuroscience consultancy. With their help, we measured second-by-second, non-conscious neurological responses to video content using a technique known as Steady State Topography (SST™).

Media content that sparks emotion and creates a sense of relevance is ultimately more likely to be remembered. This is critical both for creators trying to build a dependable audience and for advertisers seeking to influence product choices. In other words, ad-supported media only works when content is memorable enough to prompt future decision-making.

In the study, YouTube viewers were asked to watch a series of self-selected videos from their preferred YouTube channels. Participants' feelings about the self-selected content were captured in a post-lab survey that noted the specific emotions they'd felt, as well as their perception of characteristics such as authenticity and relatability. More than 400 types of content were viewed by participants from over 350 different creators, again attesting to the variety, diversity, and personalisation potential of YouTube.

During the exercise, we measured neural activity in the brain across various metrics, capturing emotional intensity (temporal lobe), personal relevance (anterior medial prefrontal cortex), global memory (right frontal cortex), and detail memory (left frontal cortex). Together, these recordings allowed us to understand people's depth of emotional engagement, the degree to which they relate to the people or ideas on screen, how themes and ideas create long-term connections, and how informative or interesting content is encoded in memory.

Young adults' (18-34) neurometrics while watching self-selected content and creators they related to⁴⁶



The results of the study were striking, revealing the strength of emotion viewers feel when watching YouTube creator content. Videos from their usual YouTube channels elicited a very high brain activity level at a 0.74 mean score (>0.7 indicates very high SST™ speed of brain activity) in terms of emotional impact.⁴⁷

The emotions consistently reported by participants after watching creator content were: happiness, inspiration, relaxation, and feeling informed.⁴⁸ This matches findings from our survey, where participants said they felt informed (87%), relaxed (86%), inspired (85%) and happy (83%) when watching YouTube creator content.⁴⁹



The study also revealed a fascinating correlation between relatability, authenticity, and emotional impact. When viewers watched creators they felt close to, their emotional response was amplified, with relatability also linked to enhanced global memory encoding,⁵⁰ indicating that viewers were more likely to remember content from creators they felt they could relate to.

Emotional response was strongest of all with creators that participants considered to be authentic⁵¹ and relatable.⁵² This suggests that authenticity plays a crucial role in fostering deeper connections – a finding reinforced by our survey, where 61% of respondents said they perceive the creators they follow on YouTube as authentically themselves.⁵³

The creator community is vast and varied, but, much like their audience, they are united in some key respects. Authenticity is a characteristic many creators have in common, as they share their unfiltered passions, perspectives, and expertise on YouTube. With very few direct correlates in commercial media, this authentic communication is something that today's audience values and craves.





CHAPTER

04

WHY ALL THIS MATTERS

Chapter 04

Why all this matters



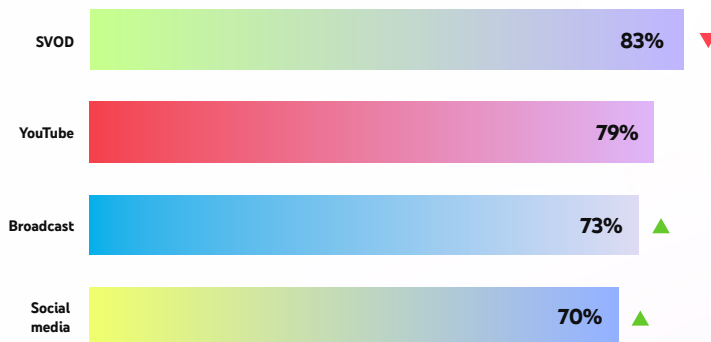
Psychologists have long understood that the more we feel, the more we remember.⁵⁴ If we experience a positive emotion, we're likely to create a positive association in memory,⁵⁵ whether it's with a person, a brand, or a piece of content. This matters in media because **it's the content and ads we remember watching that have the best chance of influencing our future behaviour.**⁵⁶

Today's viewers have high expectations, demanding content that meets technical standards and resonates with them on an emotional level. But as our neuroimaging data shows, when content meets those expectations — as it does with viewers' favourite YouTube creators — the brain lights up. **Marketers want to speak to consumers when they are at their most receptive, and no platform has more engaged viewers than YouTube.**

Powerful sentiments like these give creators and marketers a lot to work with. And while it might once have been only big-budget commercial channels that could deliver content that hit the mark both technically and emotionally, this is no longer the case. Our survey suggests that commercial and user-generated platforms have now reached near-parity in terms of their ability to deliver high-quality content that fulfils both emotional and technical needs.

High-quality video content on this service means content that has both technical and emotive quality markers⁵⁷

% among weekly users who were asked about the service (Top 2 box: Strongly/Slightly agree - closed-ended answer list)



The gap between professionally produced media and creator content has narrowed, with both forms capable of delivering compelling experiences. Confirmation of this can be found by looking at where creator content is now being watched: between 2021 and 2023, the number of top YouTube creators who received the majority of their watch time on the big screen increased more than 400%.⁵⁸

But a key differentiator remains. While even the biggest streaming services must craft content that caters to a wide audience, creators on open platforms like YouTube are able to address an enormous variety of passions, niches, and communities, delivering quality content to all of them. And what's more, they can deliver this content on any device, big or small, and with storytelling that encompasses both long-form and Shorts, offering even more opportunity for viewers to find their version of quality.



So what does this all mean for marketers?

At a high level, it suggests that video ads should aim to hit the same emotional and technical markers as other high-quality content. And with barriers to entry for technical excellence now being so low, advertisers can focus even more on exploring the emotional and storytelling potential of new formats and surfaces. Plenty of resources are available, like the creative guidance Google provides for YouTube video ads through the [ABCD framework](#).

Beyond that, it's probably fair to say that quality has always been a fast-moving target. And that's OK! Viewers know quality when they see it, and they're more than happy to invest time curating their personal media universes so they can see more of it.

Needless to say, blockbusters like "Barbie" and "Oppenheimer" will always make waves. But YouTube is where people can dive deeper. Today, the biggest and most expansive "worlds of content" can only be found on YouTube. This is where viewers go to immerse themselves in the Barbieverse, watch interviews with the real Robert Oppenheimer, or enjoy all the wonderfully mutated Barbenheimer mash-ups.

The modern audience contains multitudes, and YouTube is where they come to explore their passions in all their endless variety. This combination of rich engagement and unparalleled breadth is a huge opportunity for brands to find audiences where they are most deeply engaged.





APPENDIX

Methodology



Research agency: MTM

Study name: Why We Watch: Indispensability

1: Large-scale validation

Google quant survey across nine EMEA markets (UK, DE, FR, ES, IT, NL, PL, SE, KSA), main sample n=12,000 (n=2,000 in UK, DE, FR, n=1,000 in ES, IT, NL, PL, SE, KSA). Weekly users of video content services aged 18+ years.

Method: 15-minute mobile-friendly online survey in local language.

Services: Respondents were asked up to a maximum of two services when required. These included YouTube, [social media platforms] Instagram, TikTok, X, Facebook, Snapchat, Twitch, [streaming services] Netflix, Amazon Prime Video, Disney+, Apple TV+, [broadcast services] broadcast TV channels (e.g. local services shown), and broadcast on-demand (e.g. local services shown).

Definitions: When we say "creators", respondents in the survey were shown two definitions of creators. Those who were asked about YouTube and social media platforms were shown the definition for "social media content creators", meaning people on social media platforms who regularly share videos about their daily lives or specialised content. Some examples include people who share travel experiences, gaming skills, workouts, artwork tutorials, or other interesting content. Those who were asked about streaming and broadcast services were shown the definition for "TV or streaming service content producers", meaning people who host shows or perform on TV programmes (whether on broadcast channels, broadcast on-demand, or on streaming services), such as presenters, actors, or comedians.

MTM and Neuro-Insight study in Germany and the UK

Research agency: MTM & Neuro-Insight

Study name: Why We Watch: Indispensability

Neuroimaging experiment

Neuro-Insight's proprietary SST™ brain measurement technology was used to conduct experiments in the UK (London) and DE (Munich) to explore the relationship viewers have to creator content on YouTube. Experiments in each location measured second-by-second responses on a statistically robust sample of 72 YouTube users recruited in each market.

During the experiments, respondents were prompted with a series of tasks on YouTube while wearing Neuro-Insight's SST™ neuro-imaging technology that uniquely leverages high temporal resolution and high signal-to-noise ratios from distinct regions around the brain.

Content consumption exercises included the general browsing of the YouTube homepage, watching pre-selected videos (consistent throughout each respective market), and self-selected creator videos from those who a) they really like to watch, b) they feel a sense of closeness to or relationship with, c) they can relate to/feel represented by and d) who share their authentic real self.

Following the capture of neuro-responses, all were asked to complete a short survey which included a series of validation checks and delved further into content chosen and rational expressed feelings towards content and creators.

For all data that was collected, rigorous checks were conducted to remove incorrect data which included participants incorrectly following prompts, delays in internet (lags or loading errors), disruptions due to phone calls, watching repeat videos, etc. After data cleaning, data from 119 participants (63 UK and 56 in DE) were used for data analysis.

The final dataset was analysed using Neuro-Insight's patented SST™ neuro-imaging visualisation software. Specifically, aggregated data from various regions of the brain was assessed at a second-by-second level to explore respondents' collective neuro-responses to each piece of content, where the metrics of interest included detail memory, global memory, engagement (personal relevance), and emotional intensity.

During data processing Neuro-Insight analyses the brain activity seen per exercise tested, which is compared against their existing framework, which shows the average speed brain processing SST™ at <0.4 as low, 0.4-0.6 as moderate, >0.6, as high and >0.7 as very high performance. This threshold value of 0.7 SST™ has consistently been shown to produce an impactful response in the brain, as evidenced across a series of scientific papers showing memory encoding, memory performance, and higher recall rates.

TBA Experiments in the UK

Research agency: The Behavioural Architects

Study name: Why We Watch: The IKEA Effect

Field trial experiment

Over 600 YouTube users engaged in a longitudinal field experiment to reveal the relationship viewers form with YouTube as they use the platform over time.

In the experiment, participants were randomly assigned to two groups: the control group or the treatment group. Participants in the control group were tasked with using their own personal YouTube account as they normally would for the duration of the experiment. Participants in the treatment group were tasked with creating a new YouTube account and had to use this new account for the duration of the study. Thus, users in the treatment group had to "reset" their relationship with YouTube.

All participants answered surveys at regular intervals across a period of 2.5 weeks. In total, participants completed five surveys.

Participants answered questions about platform positivity, content relevance, and ad relevance. Participants also reported the platform behaviours they carried out when using YouTube. Finally, participants also stated their level of agreement with a range of attitudinal statements about the YouTube platform.

Sample: 600 participants in the UK, ages 18+, gender, age, and regionally representative. All regular internet users and regular users of YouTube (at least a few times a week).

Method: 5 x online surveys of 2–4 minutes in length. Conducted in local language by The Behavioural Architects in cooperation with Beam and Cobalt Sky.

Sources



- 1** YouTube Internal Data, Global, Dec. 2023.
- 2** Google/MTM, UK, Why We Watch: Indispensability, open-ended question on viewers' own definition of creator. People who claim to use video content services at least once a week: n=2,000, 2024.
- 3** ECI Media Management, Media Inflation Report, issue 35, Q1 2024.
- 4** Google/MTM, EMEA, Why We Watch: Indispensability. Base: DE, ES, FR, IT, KSA, NL, PL, SE, UK: People who claim to use video content services at least once a week: n=12,000, 2024.
- 5** Google/MTM, EMEA, Why We Watch: Indispensability. Base: DE, ES, FR, IT, KSA, NL, PL, SE, UK: People aged 18-34 who claim to use video content services at least once a week: n=2,975, 2024.
- 6-7** Google/MTM, EMEA, Why We Watch: Indispensability. Base: DE, ES, FR, IT, KSA, NL, PL, SE, UK: People who claim to use video content services at least once a week: n=12,000, 2024.
- 8** Google, Global, 1P/3P, May 2023.
- 9** Google/MTM, EMEA, Why We Watch: Indispensability. MTM survey question B2. Thinking about any video content that you watch in general, to what extent do you agree or disagree with the following statements? This could be any video, film or TV content from short form (a few seconds) to long form (30 min+). "In my opinion, high quality video content means ..." T2B [Strongly/slightly agree – closed-end answer list].
Emotive markers include answers Captures my attention; Tells a compelling story; Is relevant to my interests and preferences; Is authentic and relatable; Teaches me something new or useful; Enhances or helps me in my everyday life; Really means something to me personally; Helps me reflect or clarify my thoughts; Is emotionally engaging; Is original, creative, and offers a unique perspective. Technical markers include the answers Has clear visuals and good audio; Exhibits technical excellence (e.g. camera work, editing); Includes features (such as video filters) that set it apart from content without these. Trust includes content that provides accurate and trustworthy information.
Base: DE, ES, FR, IT, KSA, NL, PL, SE, UK: People who claim to use video content services at least once a week: n=12,000, 2024.
- 10** Google/MTM, Why We Watch: Indispensability. MTM survey questions: B2. Thinking about any video content that you watch in general, to what extent do you agree or disagree with the following statements? "In my opinion, high quality video content means ..." Base: Weekly users of any video content service (DE, ES, FR, IT, KSA, NL, PL, SE, UK, n=12,000), 2024.
- 11** Google/MTM, Why We Watch Indispensability. MTM survey questions: B2. Thinking about any video content that you watch in general, to what extent do you agree or disagree with the following statements? "In my opinion, high quality video content means ..." Base: Weekly users of any video content service (DE, ES, FR, IT, KSA, NL, PL, SE, UK, n=12,000), 2024.
- 12** Google/MTM, Why We Watch: Indispensability. MTM survey questions: B7. To what extent do you agree or disagree with the following statement? "In my opinion, high quality video content on [PLATFORM] means ..." Base: DE, ES, FR, IT, KSA, NL, PL, SE, UK: Weekly users who were asked about the service (YouTube=6,311, social media=6,171, SVOD=4,670, broadcast=3,531), 2024.
- 13** Google/MTM, Why We Watch: Indispensability. MTM survey questions: B2. Thinking about any video content that you watch in general, to what extent do you agree or disagree with the following statements? "In my opinion, high quality video content means ..." Base: Weekly users of any video content service (DE, ES, FR, IT, KSA, NL, PL, SE, UK, n=12,000 (18-34s=2,975/35s=9,025), 2024.
- 14-18** Google/MTM, EMEA, Why We Watch: Indispensability. Base: DE, ES, FR, IT, KSA, NL, PL, SE, UK: People who claim to use video content services at least once a week: n=12,000, 2024.
- 19** Google/MTM, EMEA, Why We Watch: Indispensability. Base: DE, ES, FR, IT, KSA, NL, PL, SE, UK: People aged 18-34 who claim to use video content services at least once a week: n=2,975, 2024.
- 20** YouTube Indispensability: "Quality" redefined. MTM survey questions: B6. To what extent do you agree or disagree with the following statements? "In my opinion, video content on [PLATFORM] is ..." B7. To what extent do you agree or disagree with the following statements? "In my opinion, high quality video content on [PLATFORM] means ..." Base: DE, ES, FR, IT, KSA, NL, PL, SE, UK: Weekly users who were asked about the service (YouTube=6,311, social media=6,171, SVOD=4,670, broadcast=3,531), 2024.
- 21** Google/MTM, EMEA, Why We Watch: Indispensability. Base: DE, ES, FR, IT, KSA, NL, PL, SE, UK: People who claim to use video content services at least once a week: n=12,000, 2024.
- 22** Google/Cint, Why We Watch Quant, Online Population Gen Z (18-26 yo) who claim to use the following media services at least once a week: n=722 YouTube; social media n=2,111 (n=795 Instagram; n=358 Facebook; n=958 TikTok); OTT streaming n=1,558 (n=458 Netflix; n=454 Amazon Prime Video; n=646 Disney+); n=370 broadcast on-demand services; Fielded from 23 February–01 March 2024 and 05 April–08 April, 2024.
- 23-24** TBA/Google Survey, n=623 UK YouTube users (18+ nat rep, all claiming to use YouTube at least a few times a week), March–April 2024, Q1: Thinking about the last few days only, how was your experience of using YouTube? T3B Positivity, Control (n=313), Treatment (n=310), 2024.
- 25** TBA/Google Survey, UK, n=623, YouTube users (18+ nat rep, all claiming to use YouTube at least a few times a week), March–April 2024; Q6: Thinking about the videos you saw on YouTube over the last few days only, how relevant were they to you? (T3B Content relevance), Control (n=313), Treatment (n=310), 2024.
- 26** TBA/Google Survey, UK, n=623 YouTube users (18+ nat rep, all claiming to use YouTube at least a few times a week), March–April 2024; Q2: Still thinking about the last few days, which one of the following words best describes the experience you had using YouTube? Control (n=313), Treatment (n=310), 2024.
- 27** TBA/Google Survey, UK, n=623 YouTube users (18+ nat rep, all claiming to use YouTube at least a few times a week), March–April 2024; Q3: Which, if any, of the following activities have you done when visiting YouTube over the last few days? Control (n=313), Treatment

(n=310), 2024.

28 TBA/Google Survey, n=623 UK YouTube users (18+ nat rep, all claiming to use YouTube at least a few times a week), March–April 2024; Thinking about your experience of using YouTube over the past few weeks whilst taking part in this study, to what extent do you agree or disagree with the following, T2B Attitudes, Control (n=313), Treatment (n=310), 2024.

29 TBA/Google Survey, UK, n=623 YouTube users (18+ nat rep, all claiming to use YouTube at least a few times a week), March–April 2024; Q1: Thinking about the last few days only, how was your experience of using YouTube? Control (n=313), Treatment (n=310), 2024.

30 Google/MTM, AE, DE, EG, ES, FR, GB, IT, NL, SA, Mirrors and Windows, n=10,484 people who claim to use YouTube at least once a month, n=1,456 people who claim to use YouTube at least once a month in UK, n=1,466 people who claim to use YouTube at least once a month in DE, n=1,596 people who claim to use YouTube at least once a month in ES, n=1,425 people who claim to use YouTube at least once a month in FR, n=1,544 people who claim to use YouTube at least once a month in IT, n=1,381 people who claim to use YouTube at least once a month in NL, n=1,616 people who claim to use YouTube at least once a month in MENA. All ranking, in each market, is based on brands with a base of over n=300, 2023.

31 TBA/Google Survey, UK, n=623 YouTube users (18+ nat rep, all to use YouTube at least a few times a week), March–April 2024; Q4: Thinking about the last few days only, which of the following did you do when watching ads on YouTube? Control (n=221–252), Treatment (n=232–248), 2024.

32 TBA/Google Survey, UK, n=623 YouTube users (18+ nat rep, all to use YouTube at least a few times a week), March–April 2024; Q4: Thinking about the last few days only, which of the following did you do when watching ads on YouTube? Control (n=221–252), Treatment (n=232–248), 2024.

33 YouTube Internal Data, Global, June 2023.

34 <https://www.thinkwithgoogle.com/intl/en-emea/future-of-marketing/management-and-culture/diversity-and-inclusion/mirrors-windows-identity-media/>

35 Google/MTM, Why We Watch: Indispensability, EMEA, 2024. Base: DE, ES, FR, IT, KSA, NL, PL, SE, UK: People who claim to use video content services at least once a week: n=12,000.

36 Google/MTM, EMEA, Why We Watch: Indispensability, 2024. Base: DE, ES, FR, IT, KSA, NL, PL, SE, UK: People aged 18–34 who claim to use video content services at least once a week: n=2,975, 2024.

37 Google/MTM, Mirrors and Windows EMEA exploration, qualitative depth interviews with UK media service viewers, 2023.

38–42 Google/MTM, EMEA, Why We Watch: Indispensability. Base: DE, ES, FR, IT, KSA, NL, PL, SE, UK: People who claim to use video content services at least once a week: n=12,000, 2024.

43 Google/MTM, Why We Watch: Indispensability, MTM survey questions: B8. To what extent do you agree or disagree with the following statements? “I don’t mind adverts on [PLATFORM] if they ...” Base: DE, ES, FR, IT, KSA, NL, PL, SE, UK: Weekly users who were asked about the service (YouTube=6,311, social media=6,171, broadcast=3,531), 2024.

44 TBA/Google Survey, n=623 UK YouTube users (18+ nat rep, all to use YouTube at least a few times a week), Mar–April 2024; Q2: Still thinking about the last few days, which one of the following words best describes the experience you had using YouTube? Control (n=313), Treatment (n=310), 2024.

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47–48 Neuro-Insight and MTM. Why We Watch: Indispensability, UK and Germany, NeuroImaging Study. N=119. 18+, 2024.

49 Google/MTM, EMEA, Why We Watch Indispensability. Base: UK, FR, DE, ES, IT NL, PL, SE, KSA: People who claim to use video content services at least once a week and were asked about the service: YouTube n=6,311, Social media n=6,171, SVOD n=4,670, Broadcast n=3,531, 2024.

50 Neuro-Insight and MTM, DE. Why We Watch: Indispensability, NeuroImaging Study. N=33. Aged 18–34, 2024.

51–52 Neuro-Insight and MTM. Why We Watch: Indispensability, UK. and Germany, NeuroImaging Study. N=69. Aged 18–34, 2024.

53 Google/MTM, EMEA, Why We Watch: Indispensability. Base: DE, ES, FR, IT, KSA, NL, PL, SE, UK: People who claim to use video content services at least once a week: n=12,000, 2024.

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57 Google/MTM, EMEA, Why We Watch: Indispensability, MTM survey questions: B7. To what extent do you agree or disagree with the following statements? “In my opinion, high quality video content on [PLATFORM] means ...” Base: DE, ES, FR, IT, KSA, NL, PL, SE, UK: Weekly users who were asked about the service (YouTube=6,311, social media=6,171, SVOD=4,670, broadcast=3,531), 2024.

58 YouTube Internal Data (channels w/100k+ monthly WT hours), Global, 2021–2023.

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