

# What Is...

Clarifying marketing topics and terms



# The Social Video Ecosystem

A Look Into The Evolving Landscape

July 2023



## The Social Video Ecosystem

*Untangling and simplifying marketing topics and terms*

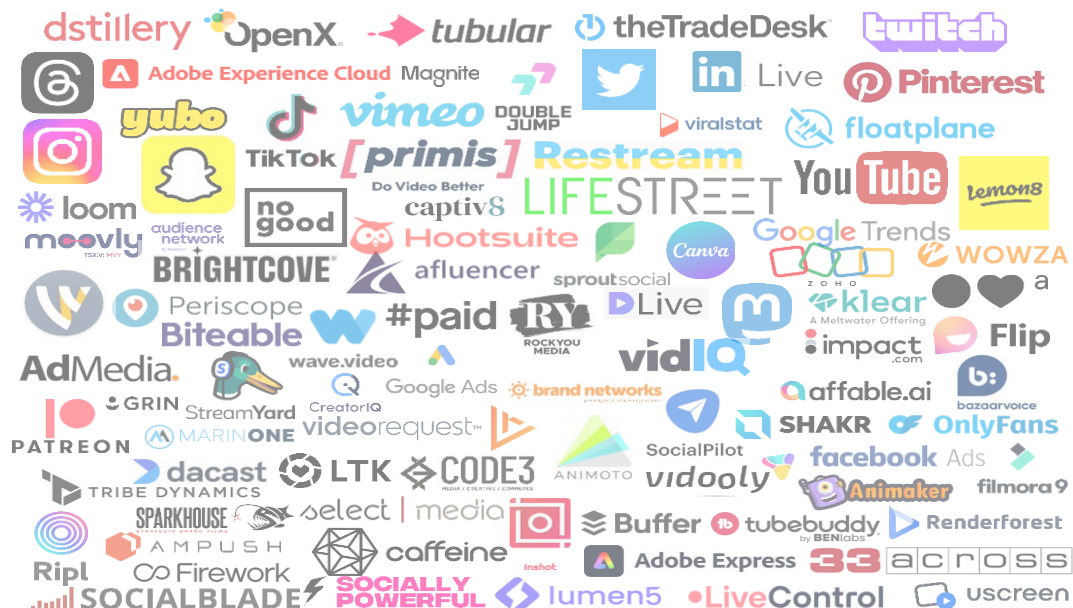
Social video encompasses typically short-form videos meant to drive viewer engagement on social networks which are produced by professional, digital-native creators, online and offline media brands or 'everyday' social media users.

Social video has experienced significant growth recently with advertising dollars more than tripling over the last four years, to almost \$40 billion, as brands look to align with, or produce, relevant content that engages their target consumers.

**Since social video is an ever-evolving ecosystem, we have created this short piece to provide marketers an overview of the following:**

- Social video advertising estimated spend and future projections
- A list of consumer-facing social video platforms by type
- U.S. social video quadrant visualization (platforms & networks, content creation & management, marketing & monetization, and analytics & optimization)
- An overview of the social video feedback loop
- Advertising opportunities through different social video ad formats

### Sampling of Companies within the Social Video Ecosystem



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## U.S. Social Video Ad Spending

Social video ad spending has more than tripled since 2019 and will soon represent a \$40 billion marketplace

### U.S. Social Video Ad Spending

\$ in Billions



Source: eMarketer, 'Social Video Ad Spending Forecast 2023,' 1/24/23. Note: excludes spending by marketers that goes toward developing or maintaining organic social video content; **excludes YouTube**; includes paid video advertising appearing within social networks, social network games and social network apps. Ad Spend Forecast based of October 2022 data. Note: YouTube advertising revenues, from eMarketer: 2019 - \$3.4B, 2020 - \$4.5B, 2021 - \$6.5B, 2022 - \$6.9B, 2023 - \$7.4B, 2024 - \$8.5B

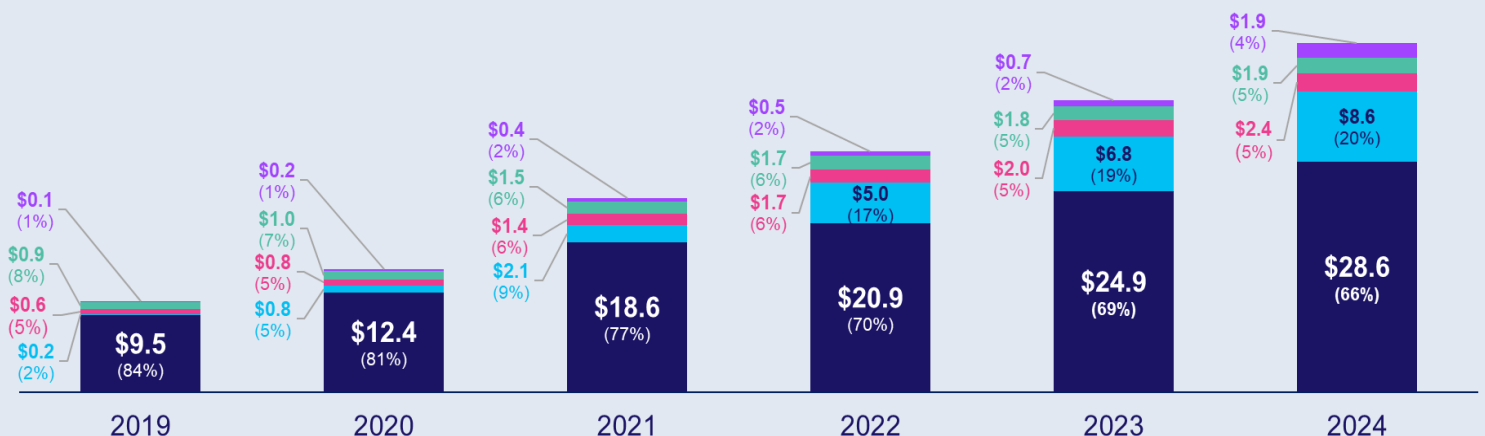
## U.S. Social Video Ad Spending by Platform

The 'Big Four' (Meta, TikTok, Snapchat and Twitter) currently represent 98% of social video ad dollars, while 'other' platforms will account for almost \$2 Billion by 2024

### U.S. Social Video Ad Spending

\$ in Billions

■ Meta ■ TikTok ■ Snapchat ■ Twitter ■ Other



Source: eMarketer, 'Social Video Ad Spending Forecast 2023,' 1/24/23. Note: excludes spending by marketers that goes toward developing or maintaining organic social video content; **excludes YouTube**; includes paid video advertising appearing within social networks, social network games and social network apps. Ad Spend Forecasts based on October 2022 data. Note: 'Other' was calculated from the remaining ad spend (as referenced in 'U.S. Social Video Ad Spending' chart) less the 'big four' ad revenues. Meta includes Facebook & Instagram.

## Consumer-Facing Social Video Platforms by Type

There are a wide range of digital platforms and services that enable professional creators and 'everyday' users to upload, discover, and engage with video content

### Social Video Platforms by Type – Consumer Facing

represents a *sampling* of platforms by type

#### Social Networks

- [Facebook](#)
  - [FB Live](#)
- [Instagram](#)
  - [IG Live/IGTV](#)
  - [Threads](#)
- [Twitter](#)
  - [Twitter Live](#)
  - [StockTwits](#)
  - [Chirpify](#)
- [LinkedIn](#)
  - [LinkedIn Live](#)
- [TikTok](#)
- [Snapchat](#)
- [Polywork](#)
- [Lemon8](#)
- [Mastodon](#)
- [Flipgrid](#)
- [Tagged](#)
- [Skout](#)
- [Nextdoor](#)

#### Social Media / Digital Focused Companies

- [Vevo](#)
- [Vice](#)
- [Buzzfeed](#)
- [Nowthis](#)
- [Barstool Sports](#)
- [Flipboard](#)
- [Bleacher Report](#)
- [UNILAD](#)
- [The Dodo](#)
- [Complex Networks](#)

#### Live Streaming Platforms

- [Twitch](#)
- [Jwplayer](#)
- [Restream](#)
- [IBM Cloud Video](#)
- [Wave Video](#)
- [Stream Yard](#)
- [Dacast](#)
- [Wirecast](#)
- [Yubo](#)
- [Wowza](#)
- [Brightcove](#)
- [Periscope](#)
- [Younow](#)

#### Social Video / Image Sharing / Video Hosting Platforms

- [Vimeo](#)
  - [Vimeo-Livestream](#)
- [YouTube](#)
- [Dailymotion](#)
- [Caffeine](#)
- [Video Genie](#)
- [DLive](#)
- [Imgur](#)
- [Smugmug](#)
- [Pinterest](#)
- [IPlayerHD](#)
- [VSCO](#)

#### Social Messengers

- [WhatsApp](#)
- [Facebook Messenger](#)
- [WeChat](#)
- [Telegram](#)

#### Video Supply Side Platforms

- [Sharethrough](#)
- [Telaria \(Magnite\)](#)
- [Dashbid](#)
- [Positive mobile](#)
- [Ad intelligent \(Verta Media\)](#)
- [Blinkx](#)
- [Positive Mobile](#)

#### Popular Multi-Channel Networks on YouTube

- [Fullscreen](#)
- [Enfinity](#)
- [Jelly Smack](#)
- [Media Cube](#)
- [Air.io](#)
- [Omnia media](#)
- [Bviral](#)
- [NetworkN](#)
- [TGN](#)
- [BBTV](#)
- [Team Whistle](#)
- [Ritual Network](#)
- [Studio 71](#)
- [Subsub](#)
- [Scalelab](#)
- [Viso.TV](#)
- [Rapt Media](#)

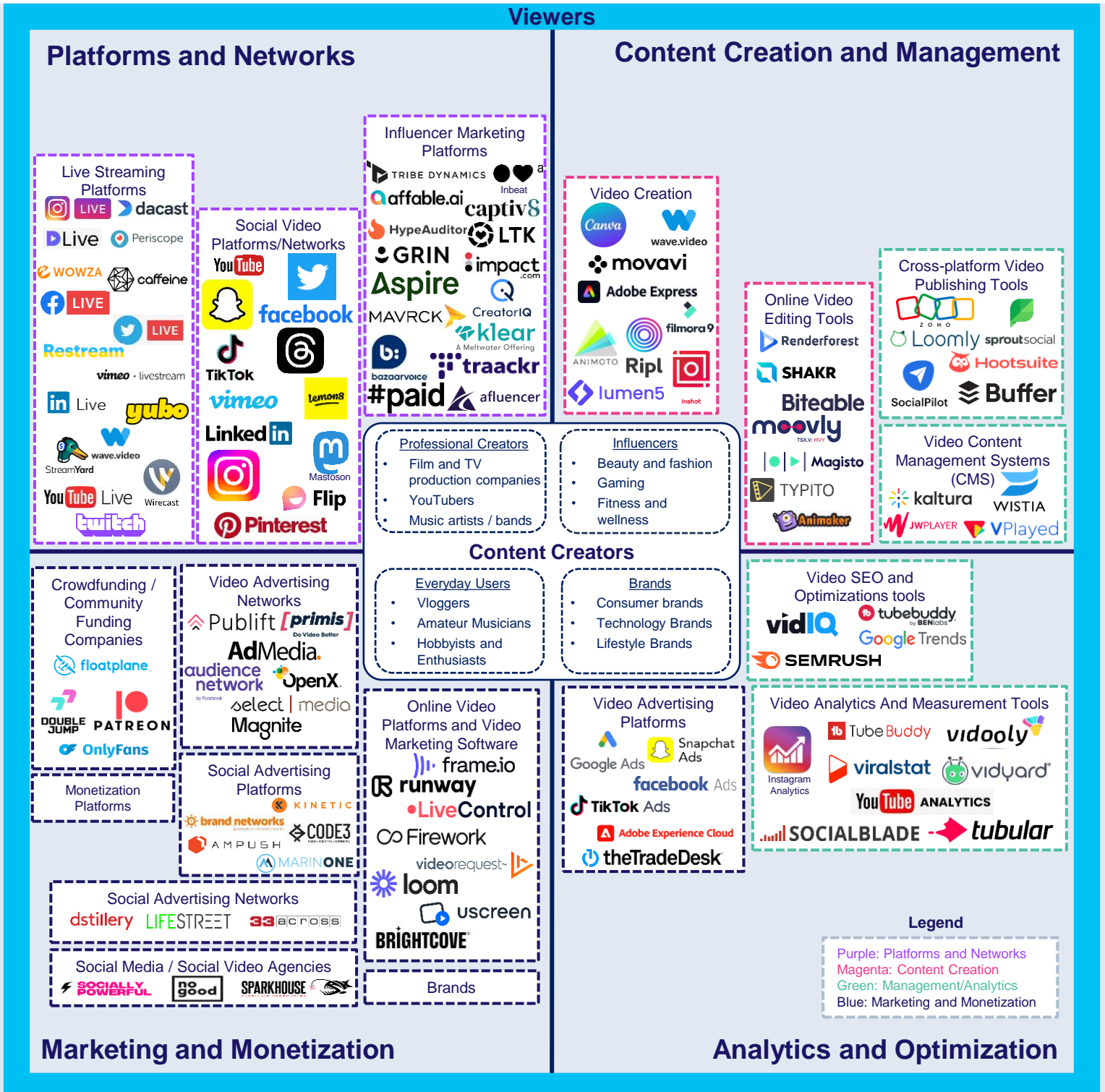
Click on company names to visit their websites (underlined are companies or products are hyperlinks)

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## U.S. Social Video Ecosystem

The social video ecosystem is continually evolving as new platforms emerge, existing platforms expand and consumer behaviors change



Note: Companies illustrated are only a sampling; many companies can represent multiple categories

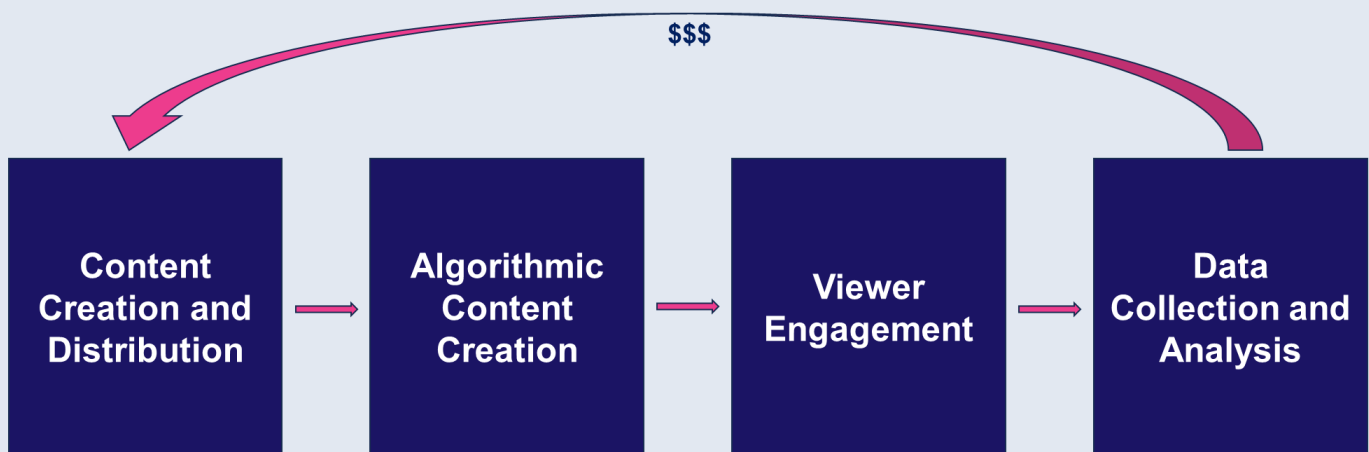
Click on company logos to visit their websites

## Social Video Algorithm Feedback Loop

The feedback loop is a cycle where viewer actions and preferences shape the algorithms used by platforms to serve social videos

- Content creators upload a post, the algorithm shows a video to people most likely to view it (based on their viewing history, interests, who they follow, etc.), viewers interact with the post, the content creator gets data about the post to optimize their monetization

Social Video Algorithm Feedback Loop



## Social Video Ad Formats

Marketers can reach audiences across a variety of ad formats which can vary by social video platform

Social Video Ad Formats (as of July 2023)

Ad Format						
<b>In-Feed</b> Appear interspersed throughout a user's feed	✓	✓	✓	✓	✓	✓
↳ <b>Carousel</b> Group two or more videos or images into a single ad	✓	✓		✓		**
↳ <b>Collection</b> Shoppable photos and videos under one featured video	✓	✓	*	**	✓	✓
↳ <b>Takeover</b> Served at the top of a user's feed when they first open an app			✓	✓	✓	✓
<b>In-Stream</b> Appear before, during, or after longform video content	✓		✓		✓	✓
<b>Stories</b> Appear between Stories from accounts a user follows	✓	✓			✓	
<b>Short Video</b> Appear between user-generated short-form videos (e.g., Reels, YouTube Shorts)	✓	✓	✓		*	✓

\* : In Development  
\*\* : Limited Offering

Source: eMarketer, Social Video Ad Formats 2023. Note: TikTok Collection ads are currently being tested and are not available in all markets. Twitter's Collection ads do not support video assets. Snapchat has begun testing ads on its short-form video platform, Spotlight. YouTube's Discovery Carousel ads do not support video assets.

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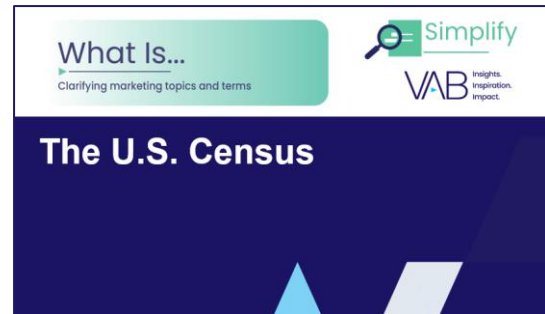
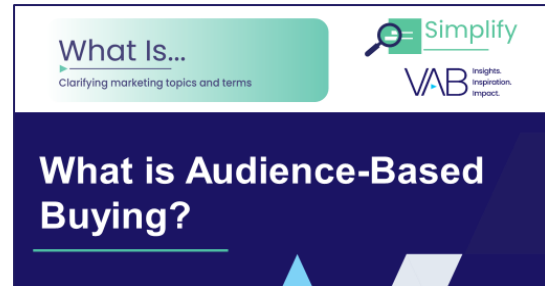
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## About VAB

VAB is an insights-driven organization that inspires marketers to reimagine their media strategies resulting in fully informed decisions.

Drawing on our marketing expertise, we **simplify** the complexities in our industry and **discover** new insights that **transform** the way marketers look at their media strategy.

We are committed to your business growth and proud to offer VAB members, brand marketers and agencies **complimentary access** to our continuously-growing Insights library. **Get immediate access at theVAB.com.**