

2024 DIGITAL VIDEO AD SPEND & STRATEGY REPORT

FULL REPORT

JULY 2024



iab.



Advertiser
Perceptions

Strategic Market Intelligence. ACTIVATED.



Guideline



FOREWORD

IAB's *Digital Video Ad Spend & Strategy* report provides a lens into the TV/digital video market and offers guidance for buyers and sellers on how to position and differentiate their strategies based on the market opportunity.

IAB partnered with Guideline, which leveraged its proprietary ad billing data, other market estimates, and an IAB-commissioned Advertiser Perceptions quantitative survey of TV/digital video ad spend decision-makers to generate these results.

This full study rounds out part 1, published in May, which reported that total digital video advertising spend is projected to grow 16% in 2024 – nearly 80% faster than total media overall*. Within digital video, CTV, online video and social video are all projected to see double-digit spend increases in 2024.

Now revealed are insights into the buy-side's selection criteria for investing in digital video channels, platforms, and media properties. Spoiler alert: although reach, ad quality, and measurement matter most, "business outcomes" is the most important KPI. As buyers continue to place a premium on performance, they are focused on measurement – yet two-thirds cite issues across nine key areas of measurement.

To mitigate these issues during times of data signal loss, buyers are adopting measurement approaches less reliant on big data and more so on modeled data including AI, data-driven optimization, multi-touch attribution, and media mix modeling. Also percolating on the measurement front is the fact that adoption and interest in alternative currencies is now industry-wide.

This research is designed to inform and inspire the market to seek innovation and solutions that will propel the fastest growing channel in media to reach its full potential for both the industry and viewers.



*IAB's 2024 Ad Spend Outlook report





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KEY INSIGHTS



01

Increased spend across each digital video channel is driving spend across all video content types.

From short-form to long-form to creator to immersive, more buyers are investing across all digital video content formats. Short form and vertical-oriented account for the largest share of buyers at 69% and 68%, respectively.

02

Accounting for three-fourths of transactions, programmatic is the go-to method for CTV activation.

Within programmatic CTV, activation is roughly equal among the open exchanges/RTB (36%), PMP / preferred deals / programmatic guaranteed (34%), and ad networks (30%). Key drivers are performance and functionality.

03

“Business outcomes” is the top KPI to determine success at the digital video channel level.

Including sales, store/site visits, and leads, business outcomes is the most important KPI for buyers of social video, online video, and CTV. Social exceeds online video, and CTV at 64% vs. 58% and 54%.

04

Digital video measurement issues are most acute with the long tail of small advertisers*.

Though two-thirds of buyers cite issues across measurement, small spenders are significantly more likely to cite issues with viewability, standardized targets, currency, and obtaining sell-side data.

05

Adoption and interest in alternative currencies is now widespread.

Whether transacting, testing, or researching, nine in ten buyers are embracing alternative currencies -- 28% are transacting. Further adoption hurdles are cost, complexity, and industry alignment.

SECTION

1



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AD SPEND PROJECTIONS, CONTENT FORMATS, AND PROGRAMMATIC

Digital video is projected to surpass linear TV in ad spend in 2024

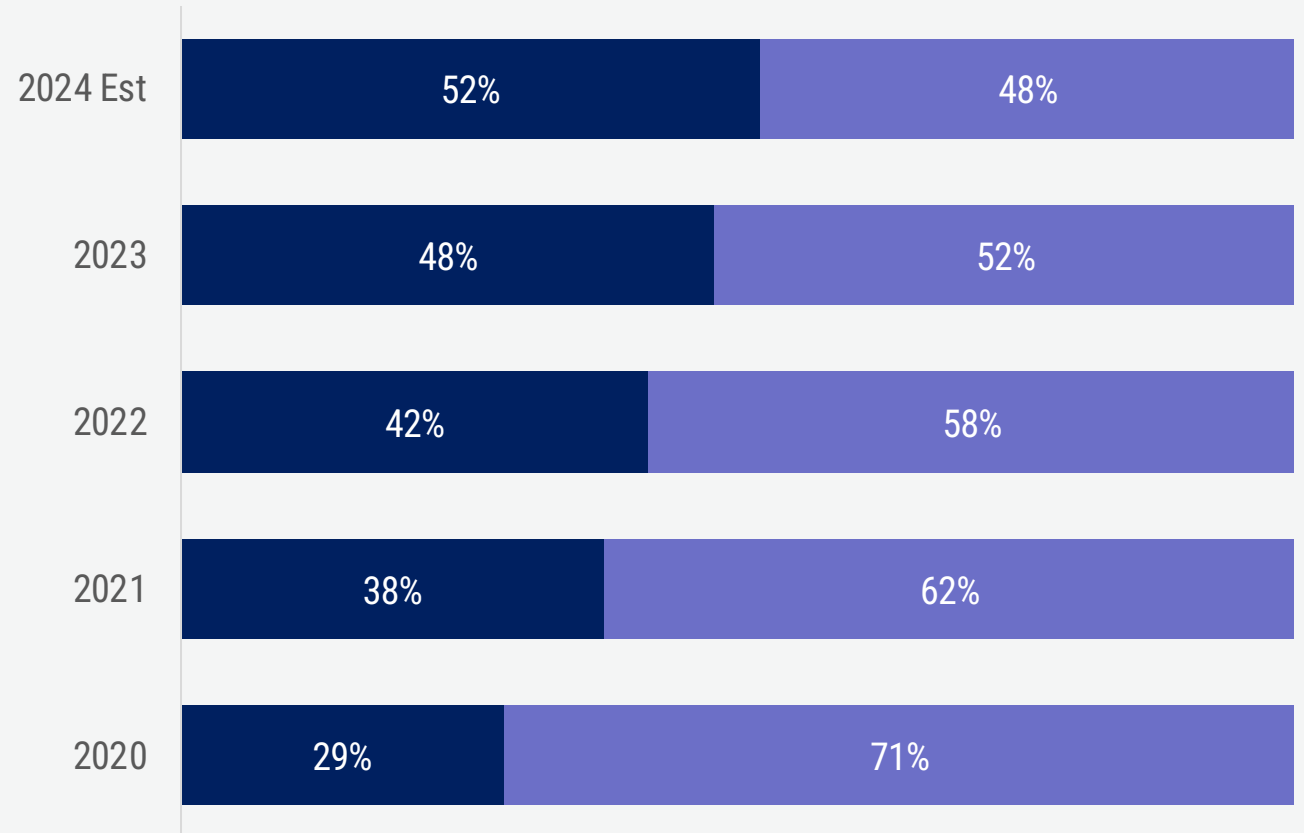
Since 2020, ad spend share has shifted nearly 20 percentage points from linear TV to digital video*.

As the shift in viewership from linear TV to streaming accelerates, ad spending is also transitioning. E.g., the largest pay TV providers lost 5M subscribers in 2023, adding to the 4.6M lost in 2022. This reflects an ongoing annual decrease in subscribers of approximately 6%**.



U.S. TOTAL ANNUAL TV/VIDEO SPEND SHARE

■ Digital Video* ■ Linear TV

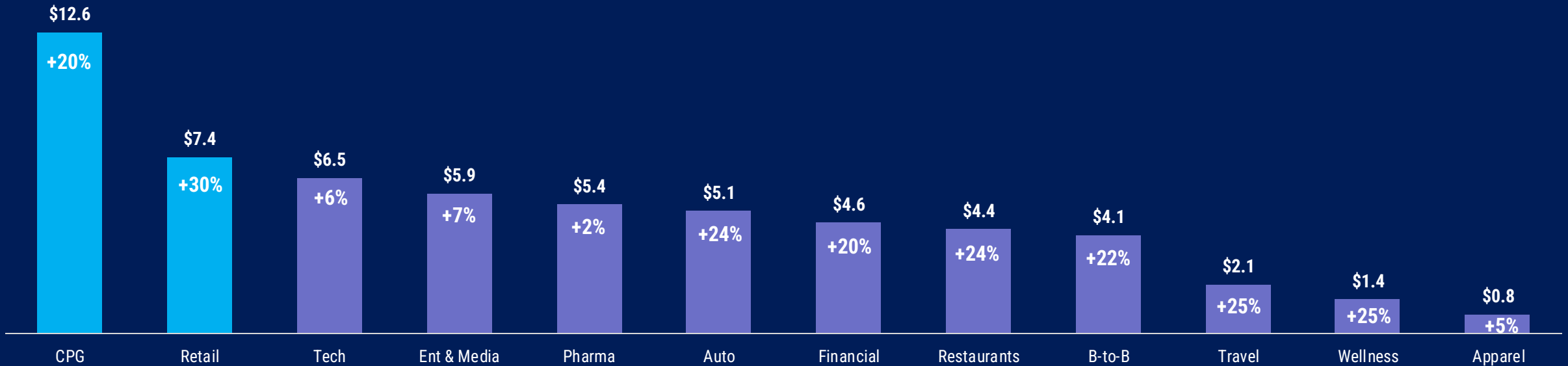


Led by CPG and retail, most categories will increase digital video ad spend by double-digits in 2024

CPG brands are leveraging CTV's increased scale, ability to connect with consumers directly, and streaming companies' partnerships with retail media networks. Retail, auto, and restaurant brands are finding significant value in the ability to personalize messaging based on geography.

U.S. 2024 ESTIMATED DIGITAL VIDEO AD SPEND BY CATEGORY (\$B)

YoY Estimated Growth (2024 vs. 2023)



Each digital video channel is projected to post double-digit spend increases in 2024

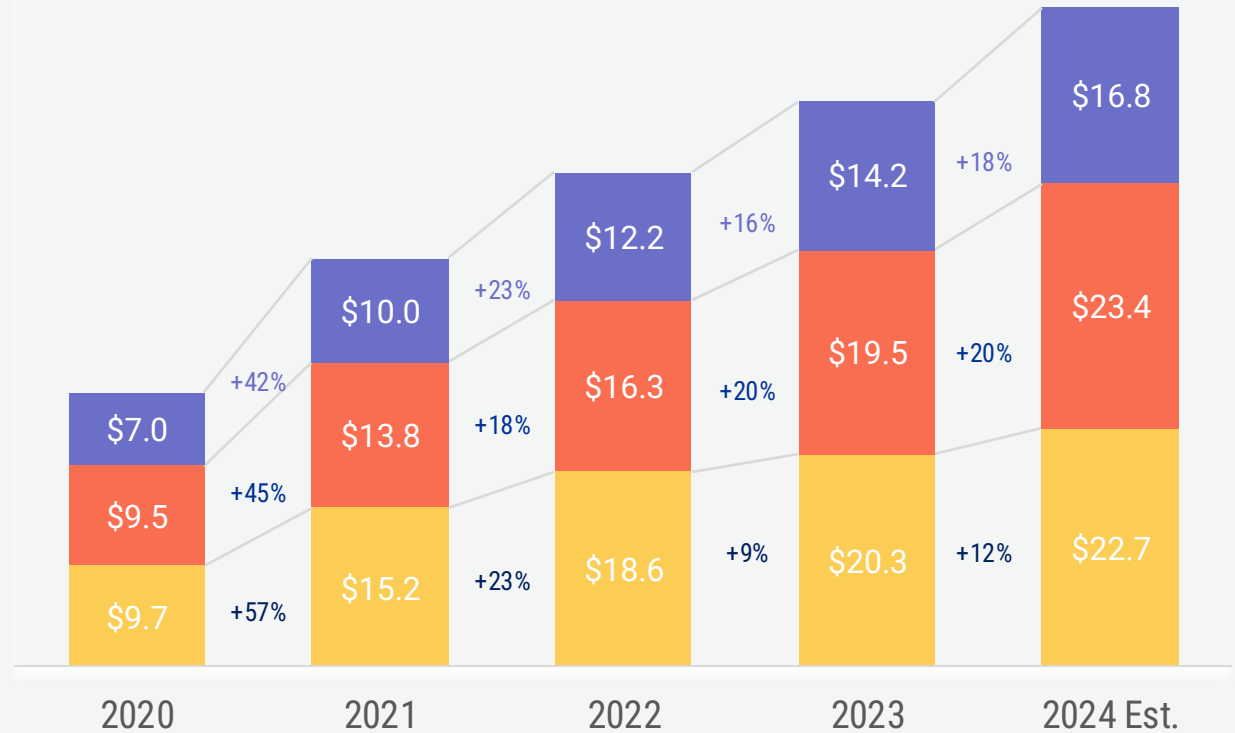
CTV ad spend exceeded \$20B for the first time in 2023 and is projected to grow 12% in 2024 — 32% faster than total media overall*.

Investment within FAST services has increased 7pts YoY (51% vs. 44%) and is now in line with ads bought on vMVPDs (55%) and streaming platforms (53%).



U.S. ANNUAL DIGITAL VIDEO AD SPEND BY TYPE (\$B)

CTV Social Video Online Video



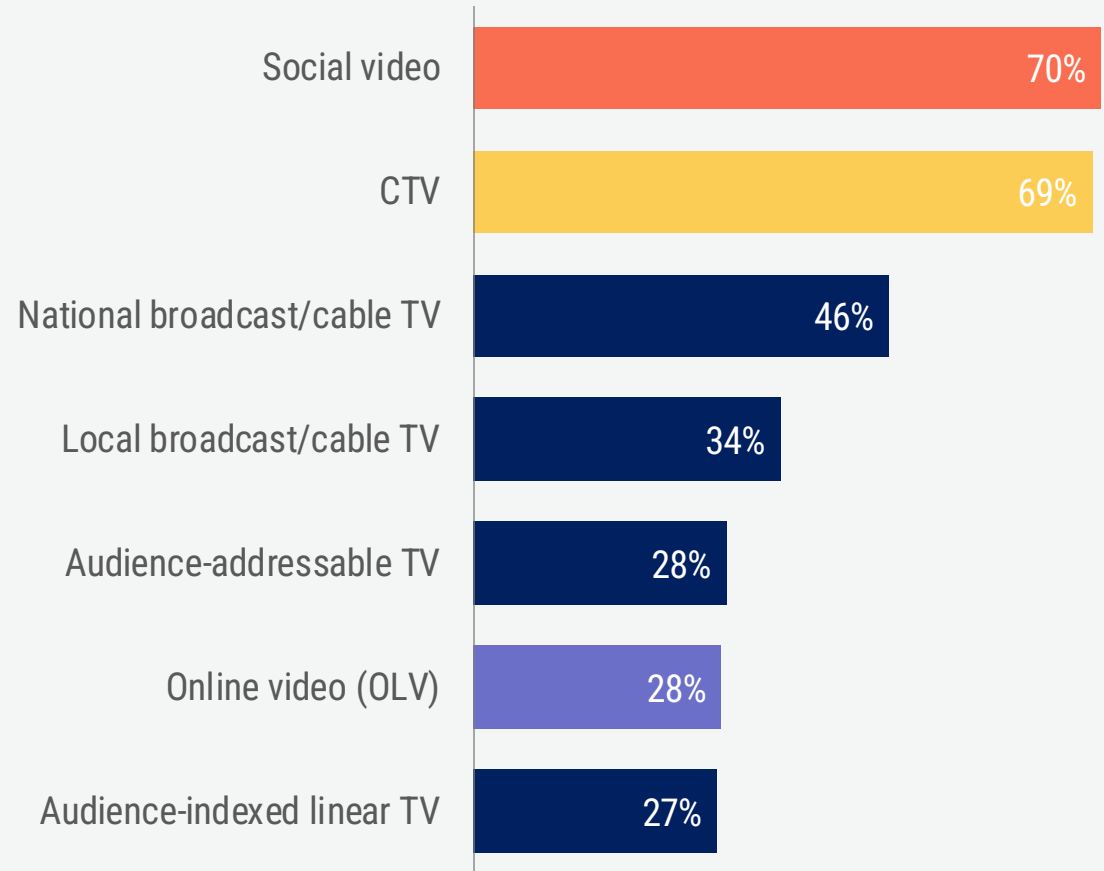
CTV along with social video continue to be the top 'must buys' among the largest ad spenders*

CTV and social video continue to be valued as audience-addressable channels that deliver both scale for branding at the top of the funnel and performance outcomes at the bottom of the funnel.



% THAT CONSIDER A "MUST BUY" (NECESSARY FOR MEDIA PLAN)

*BASE: \$50M+ IN ANNUAL US MEDIA SPEND



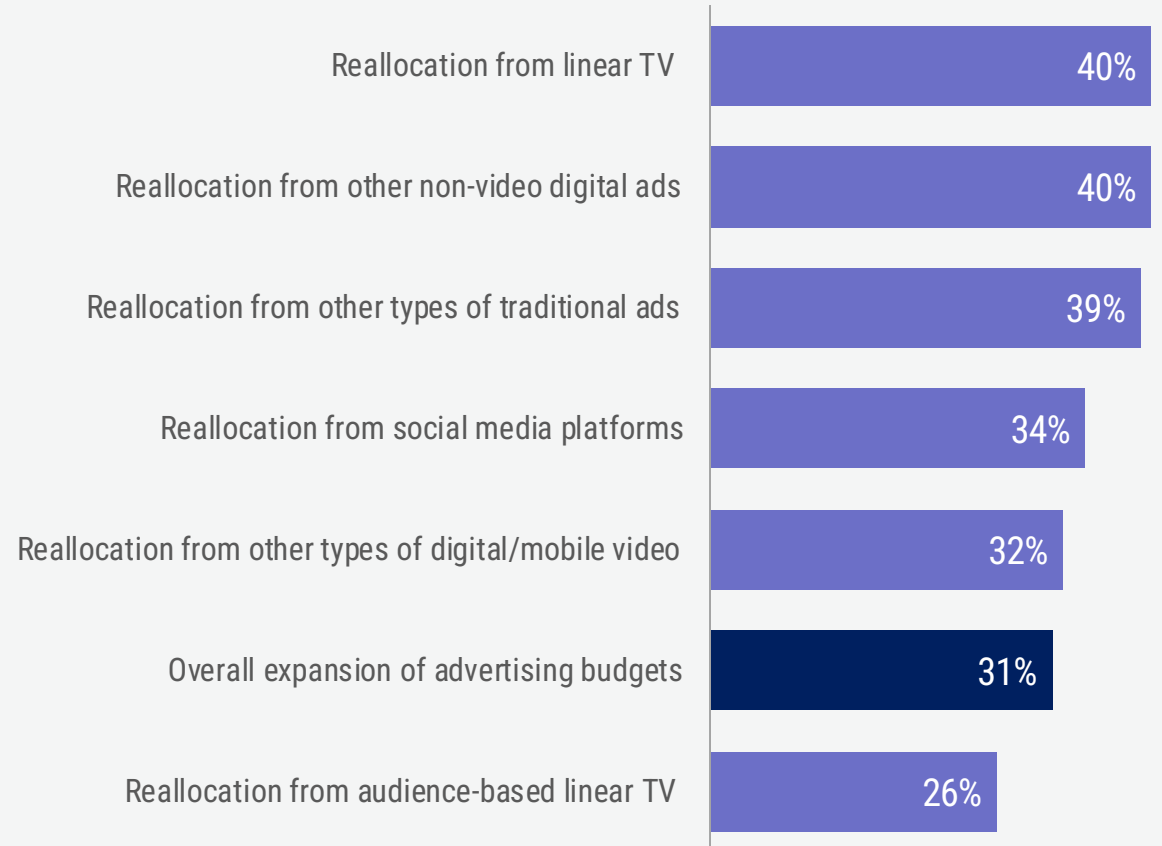
Dollars flowing into CTV primarily come from reallocations – particularly linear TV and other traditional media

Reallocation to non-video digital channels increased by nine percentage points YoY. Per a 2024 Advertiser Perceptions study, one-third of advertisers identify their “general digital budgets” as a key funding source for CTV.



FUNDING SOURCES FOR INCREASED CTV SPENDING

BASE: THOSE INCREASING CTV SPENDING IN 2024



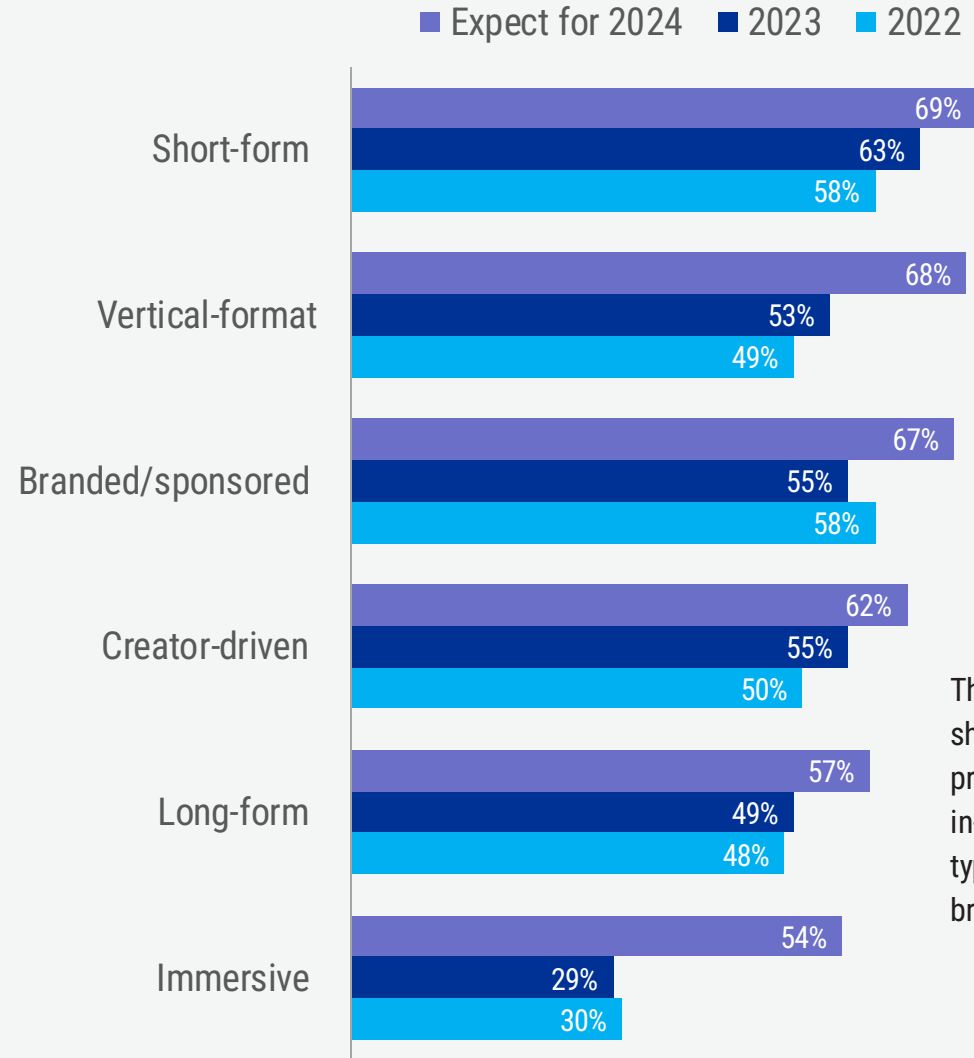
More buyers are advertising against every major type of digital video content

Though the fragmentation of video content adds complexity, it also enables buyers to serve multiple consumer demos, mindsets, and interests.

The prevalence of short-form and vertical-format videos reflects how consumers are most likely to watch social video.



TYPES OF CONTENT/FORMATS ADVERTISERS RUN AGAINST



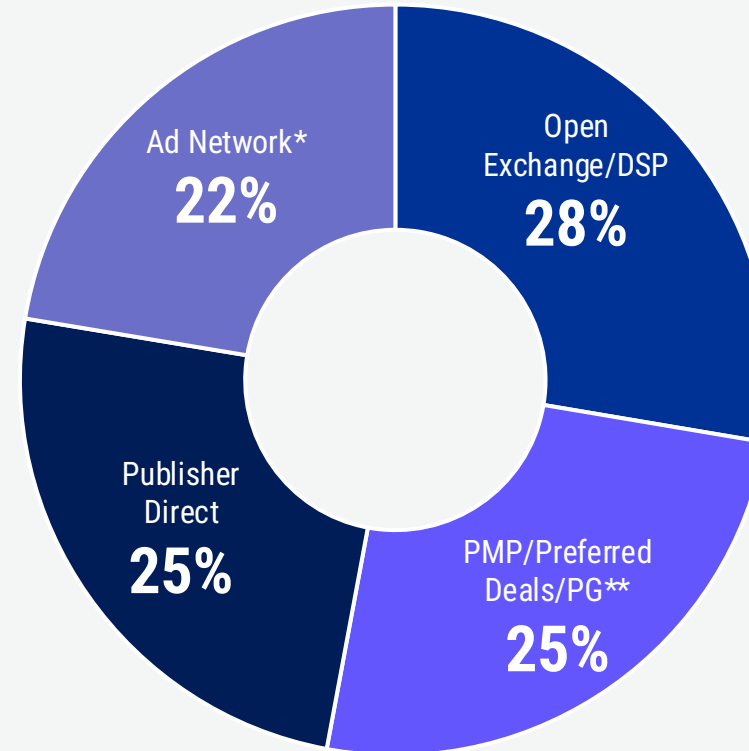
The rise of QR codes, virtual shopping –including test drives, product try-ons, etc. – as well as in-game experiences are the types of immersive content that brands are increasingly using.

Three-fourths of CTV transactions are occurring programmatically

The industry is increasingly adopting programmatic buying, with a particular focus on ad-supported streaming TV. As programmatic proficiency increases, more CTV dollars will flow to these automated channels.



% of CTV ADVERTISING BY TRANSACTION TYPE (EXPECTED FOR 2024)



Those increasing CTV spend in 2024 are 61% more likely to use programmatic vs. those keeping spend flat (58% vs. 36%).

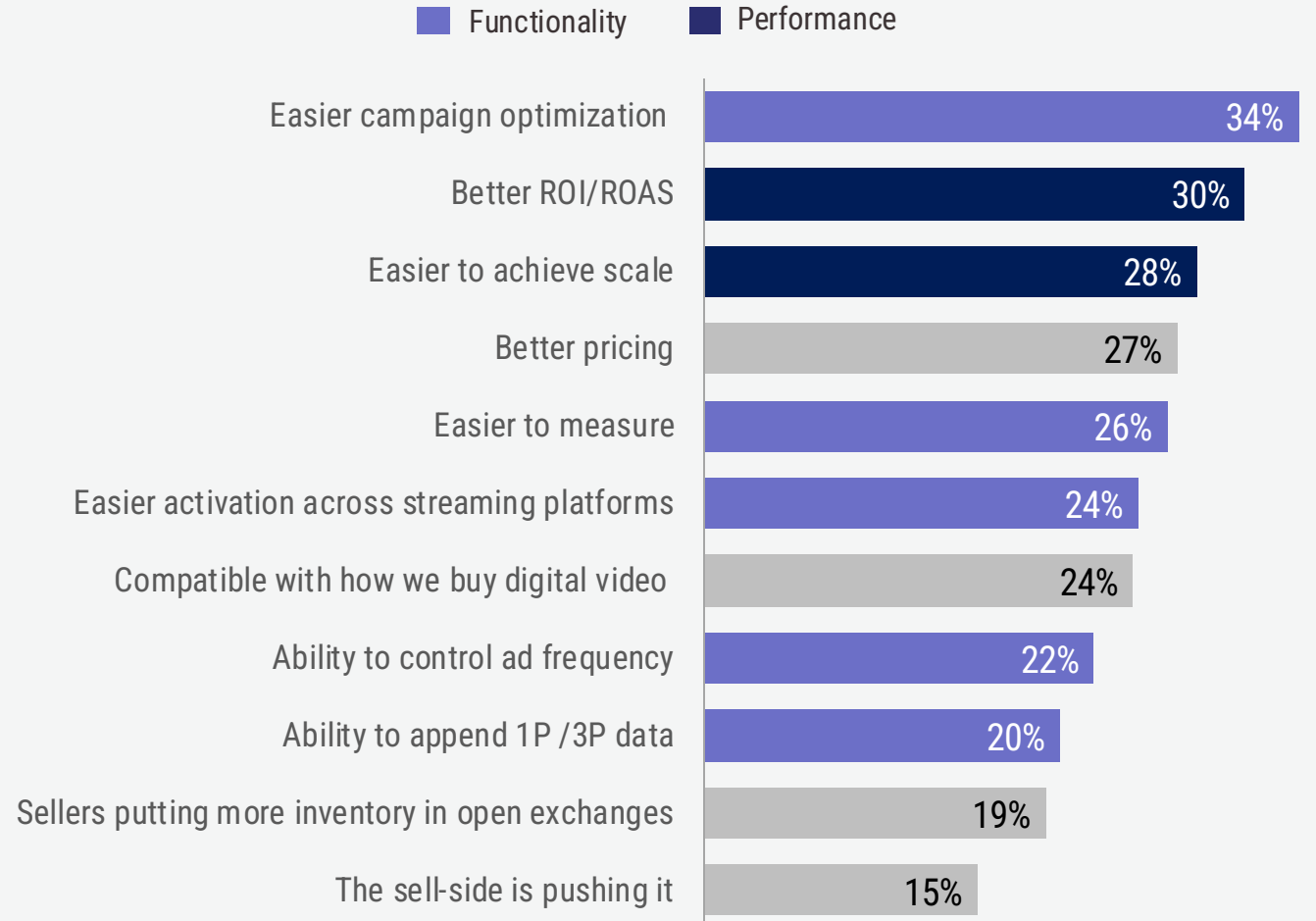
Leveraging programmatic for CTV enhances efficiency and ROI while providing buyers more functionality

The functionality that programmatic offers, including the ability to optimize, measure, and active across multiple streamers, control frequency, and append data, are key features that buyers of all spend levels desire.



TOP THREE REASONS TO BUY CTV PROGRAMMATICALLY

BASE: THOSE TRANSACTING CTV PROGRAMMATICALLY



SECTION
2



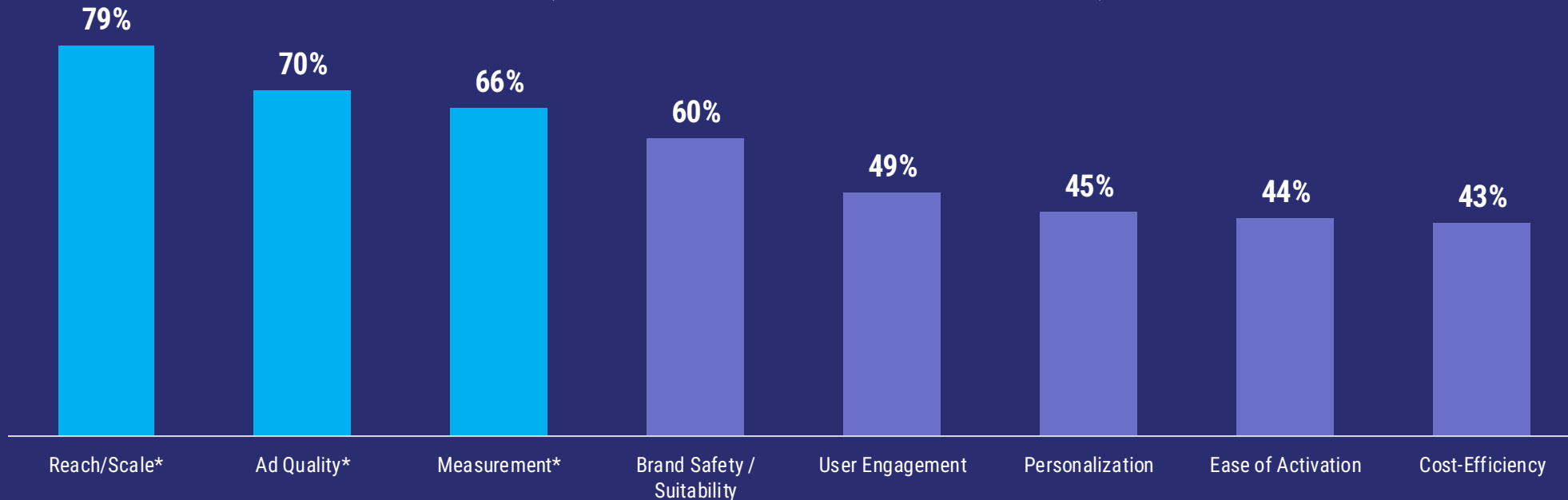
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BUYER SELECTION CRITERIA: CHANNELS, PLATFORMS AND AD PARTNERS

Reach, ad quality, and measurement are the most important criteria when buyers decide to invest across digital video channels

Despite issues with measurement (see slides 21-22), heightened concerns with brand safety, and a focus on making every investment dollar work in a competitive market, buyers prioritize reaching as many consumers as possible.

TOP 3 MOST IMPORTANT CRITERIA WHEN INVESTING IN DIGITAL VIDEO CHANNELS (Incl. Social Video, CTV, and Online Video)



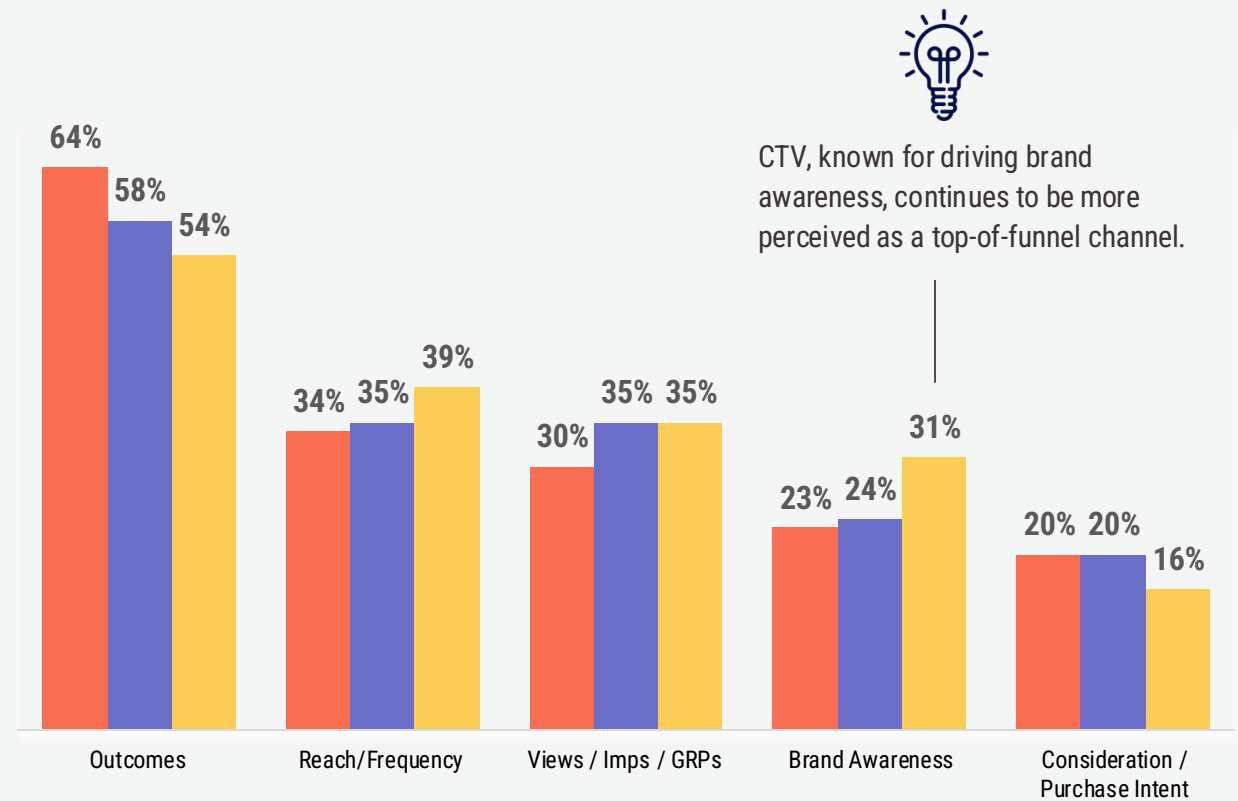
In determining success with a digital video channel, “business outcomes” is the most important KPI

Business outcomes, including sales, website actions, store visits, lead generation, and customer acquisition, are more likely to be assigned to social video due to its inherent nature to engage users in customized feeds and the ability to shop directly within the platforms.



TOP KPIs FOR ASSESSING SUCCESS

■ Social Video ■ Online Video ■ CTV



- ⋮ **When selecting ad partners within each channel (e.g., a specific social platform, streaming network, or publisher) buyers prioritize finding the right audience**

66%

of buyers cite audience personalization capabilities as the most crucial criteria when selecting a partner



An ad partner's selection criteria varies by channel for ROI, brand safety, and placement transparency

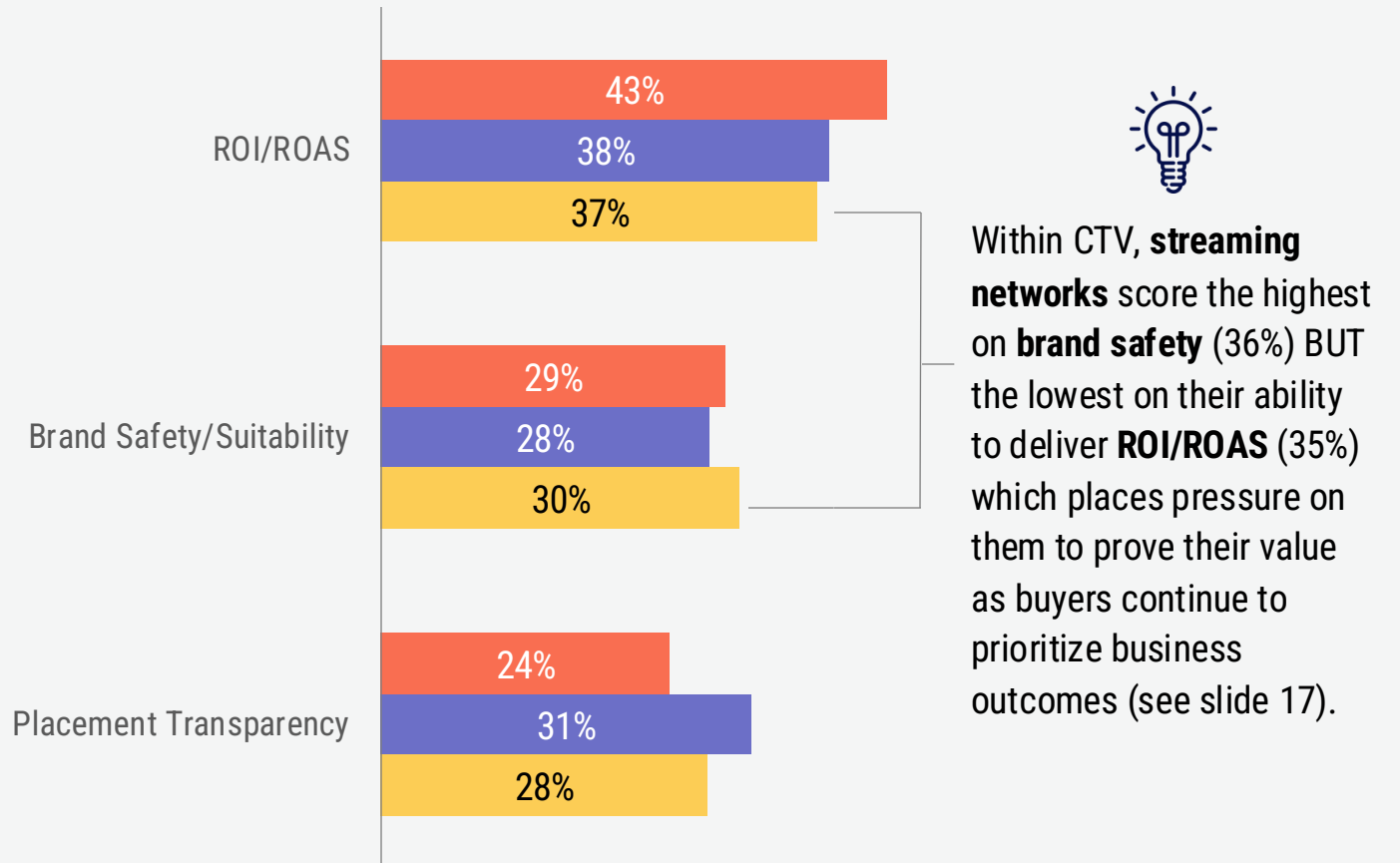
Social media's built-in, AI-based performance tools and commerce capabilities enable brands to better understand ROI/ROAS.

Online video's need to prove transparency stems from its presence across the open web, exacerbated by unknowns around in-stream vs. out-stream placement and the content surrounding the video.



TOP CRITERIA WHEN CHOOSING TO ADVERTISE WITH A PARTNER

Social Video Online Video CTV



SECTION

3



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MEASUREMENT CHALLENGES AND MITIGATION TACTICS

Roughly two in three buyers cite issues across nine key areas of measurement

Per IAB’s 2024 Ad Spend Outlook report, more than half (56%) of buyers are increasing performance advertising in 2024. This places pressure on the sell-side and measurement companies to improve measurement capabilities, particularly for co-viewing, transparency, and brand safety/suitability.

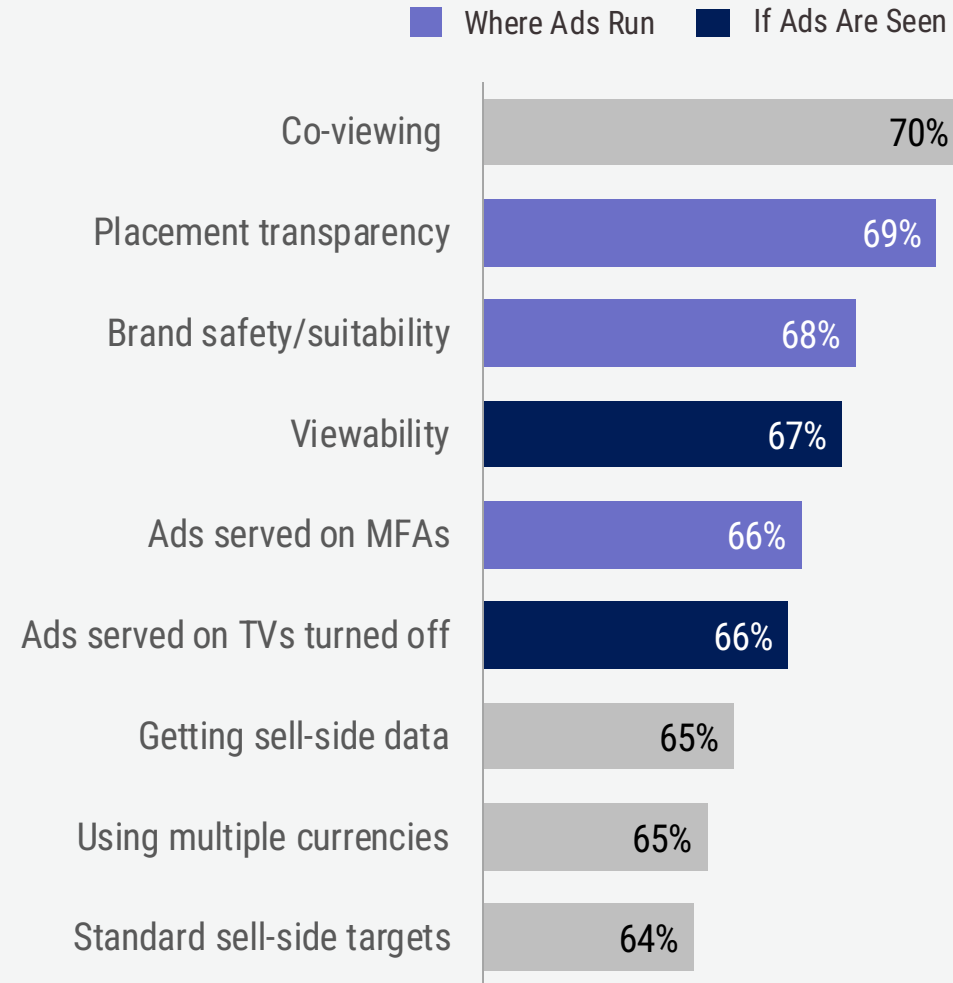
“Measuring co-viewing behaviors is particularly important because it directly affects our understanding of audience engagement and audience reach. Without accurately capturing who is watching content together, we risk misinterpreting viewership data and making false assumptions about the preferences and behavior of our target audience.”

-Director, Small Spending, Agency



ISSUES MEASURING THE EFFECTIVENESS OF TV/VIDEO CAMPAIGNS

% SAYING THE FOLLOWING IS VERY MUCH OR SOMEWHAT AN ISSUE

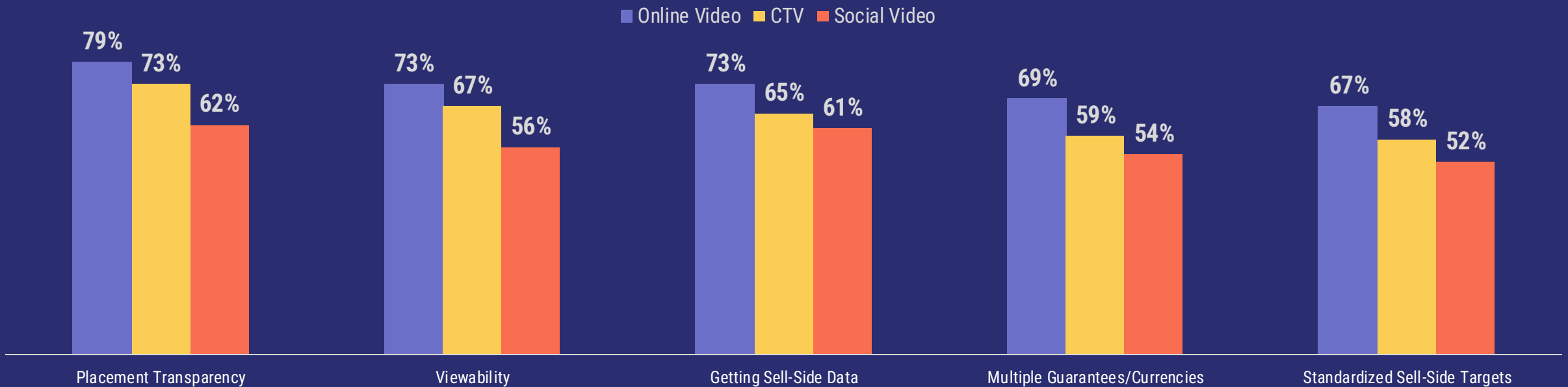


Placement transparency and viewability were nearly 30% more likely than co-viewing to be cited as “very much” an issue.

Issues with measurement vary significantly by channel – particularly with online video and CTV

Online video struggles with inconsistent publisher-level measurement frameworks, making it hard for buyers to understand placement, viewability, and guarantees. CTV faces similar issues due to a lack of shared show-level data and inconsistent measurement approaches.

ISSUES AFFECTING THE EFFECTIVENESS OF TV/VIDEO CAMPAIGNS



From viewability to brand safety, small spenders cite issues much higher than their larger competitors

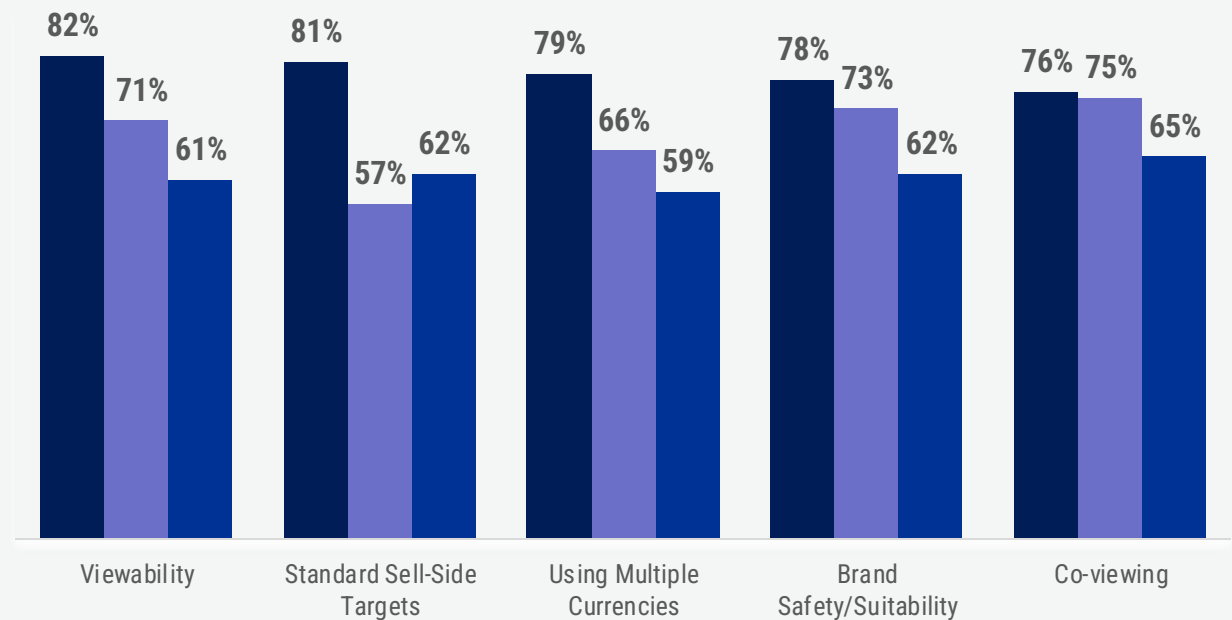
Small spenders typically prioritize targeting specific audiences vs. achieving mass reach which requires precise measurement. However, they often lack the resources to enlist measurement partners and face limited transparency from social platforms.

Streaming networks wanting to further tap the “long tail” of small spenders will need to establish confidence in these areas.

“Brand safety is most concerning because it is the brand’s image which is at stake. We want to control where our ads should be shown, whom to be shown to, what audiences to target, etc.”
-Director, Small-spending, Agency

ISSUES AFFECTING THE EFFECTIVENESS OF TV/VIDEO CAMPAIGNS (BY AD SPEND LEVEL*)

■ Small Spenders ■ Mid-Tier Spenders ■ Large Spenders



From viewability to standardized targets, brands cite issues much higher than the agencies

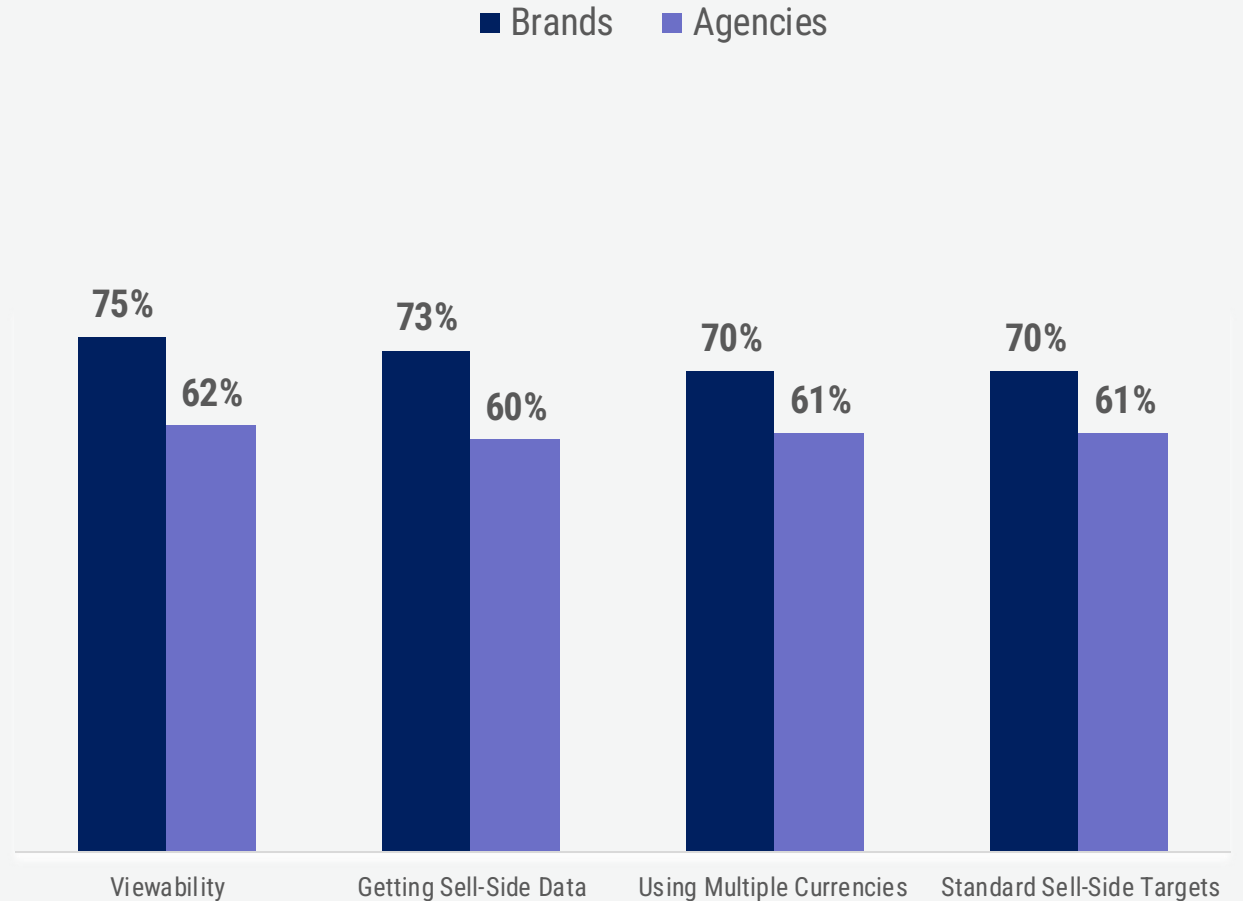
Key drivers include a lack of resources within small to mid-tier agencies to enlist measurement partners, having less expertise in measurement, and less exposure to performance which is typically handled by their agencies.

“A brand that can demonstrate that its visible impression is positive, professional and attractive is more likely to stand out in a competitive marketplace.”

-Manager, Large Spender, B-to-B Brand



ISSUES AFFECTING THE EFFECTIVENESS OF TV/VIDEO CAMPAIGNS (BY BRANDS VS. AGENCIES)



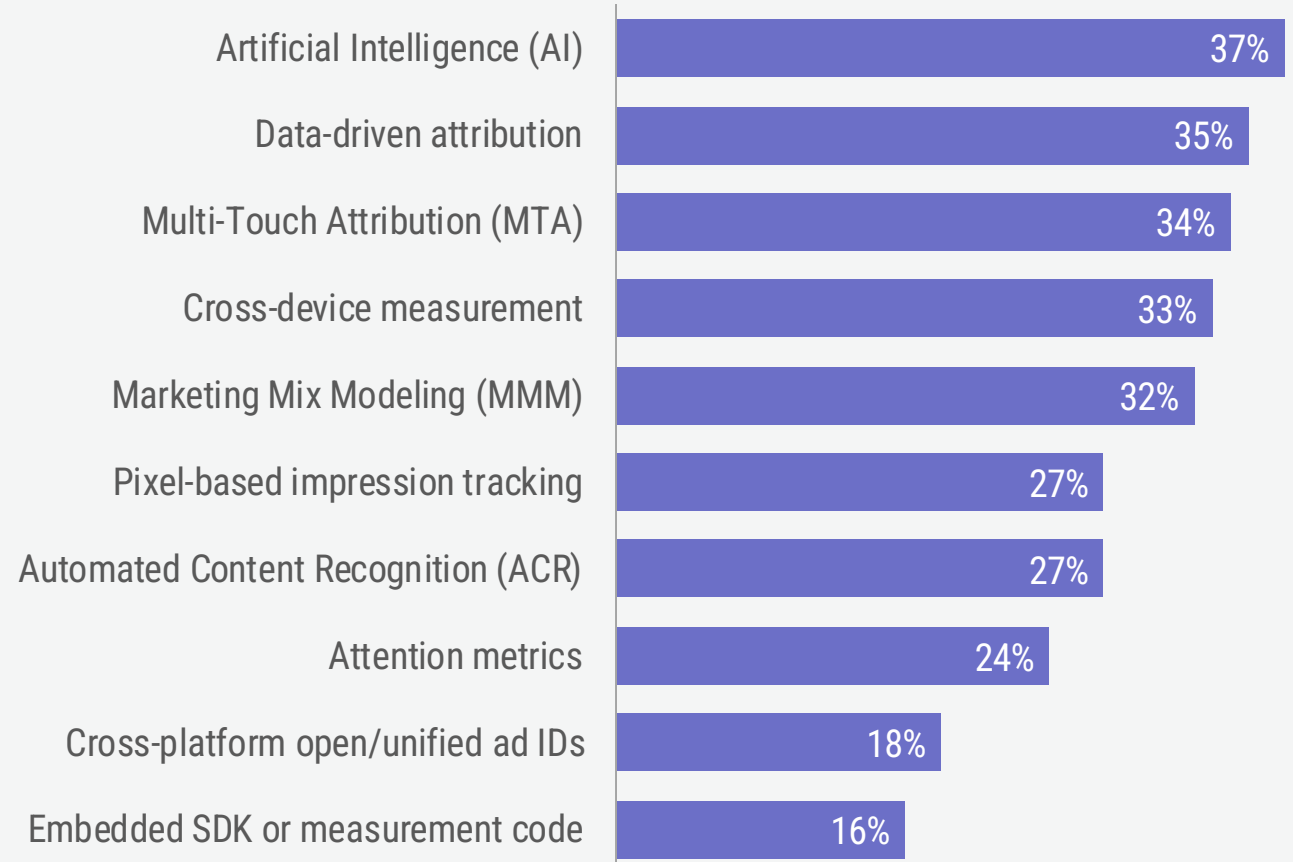
As privacy-by-design proliferates, buyers are turning to measurement tools less reliant on data signals

AI, data-driven optimization, MTA, and MMM enable buyers to understand performance based on modeled data as signal deprecation continues to decrease the pool of available data.

Beyond helping power the tools above, AI is being used to measure brand safety/suitability/fraud (41%), and outcome prediction (32%).



TACTICS USED TO MITIGATE MEASUREMENT ISSUES





Adoption and interest in alternative currencies is now widespread

89%

of advertisers have embraced alternative currencies in some form – either via **transacting**, **testing**, or having **discussions with vendors**.

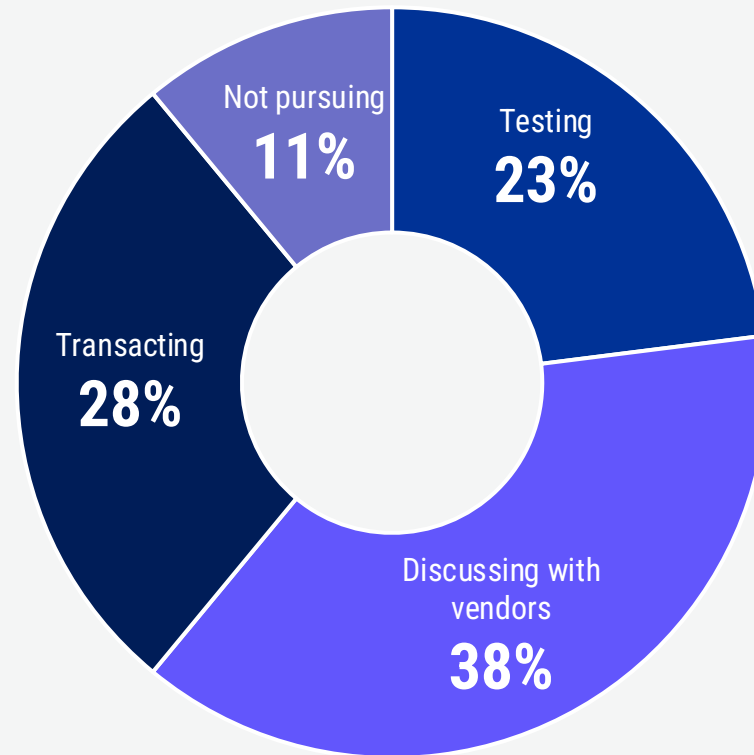


Nearly 30% of TV/Video buyers are already transacting on alternative currencies

Buyers are now transacting or testing on average 3 different alternative currencies –they expect that to climb to 4 by 2025.



APPROACH TO ALTERNATIVE TV/VIDEO BUYING CURRENCIES



Multi-screen attribution and real-time reporting are the top reasons for using alternative currencies

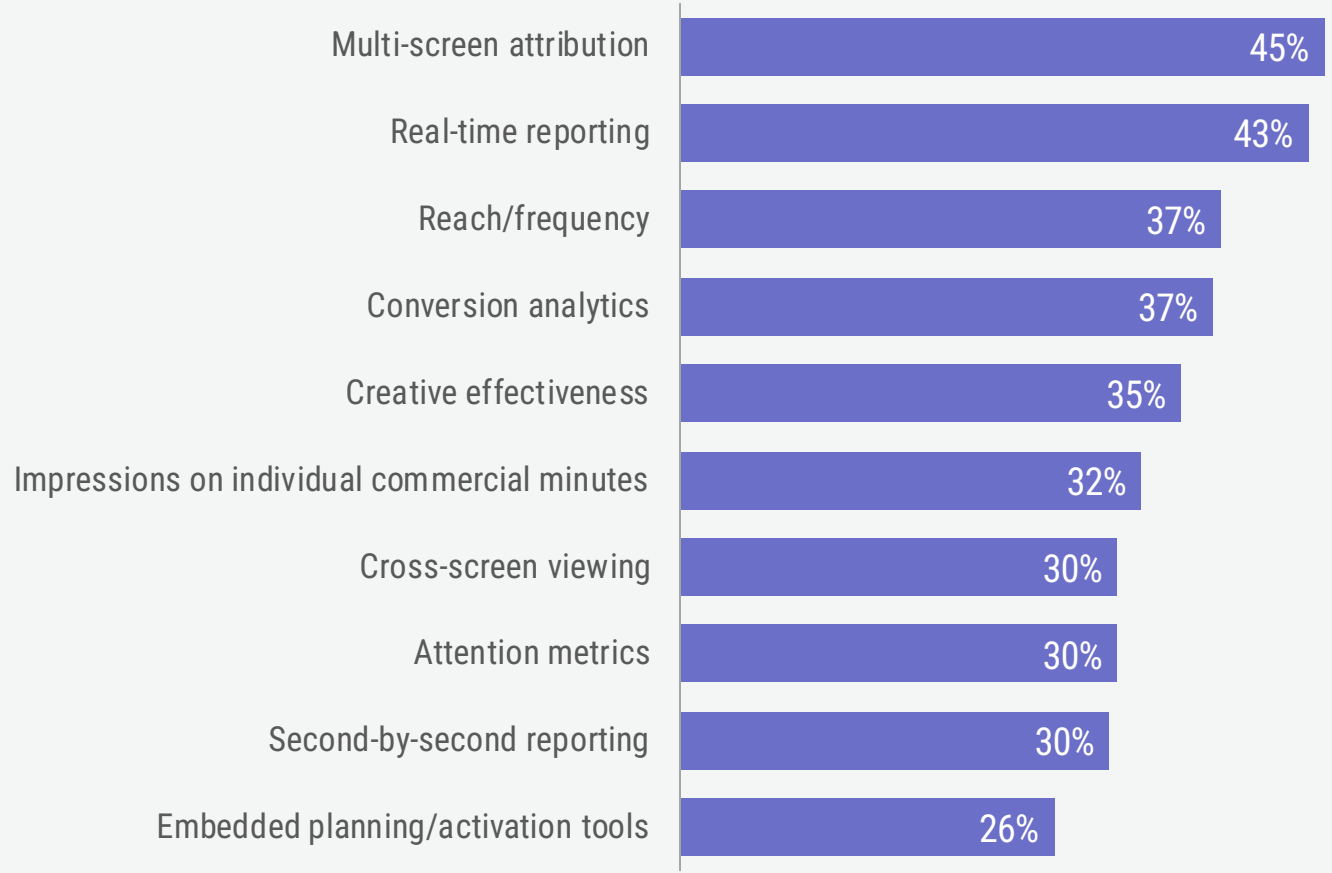
“Real-time audience measurement metrics that capture cross-platform viewership, engagement, and demographic data are needed to adapt to evolving viewing habits and technologies.”
 -Department Head, Small Spender, B-to-B Brand



Small spenders are more likely to leverage alternative currencies for creative effectiveness (57%), conversion analytics (51%), and second-by-second reporting (51%).
 (Data not shown)

MEASUREMENT THAT ALTERNATIVE CURRENCIES ARE BEING USED FOR

BASE: USING/TESTING MULTIPLE CURRENCIES



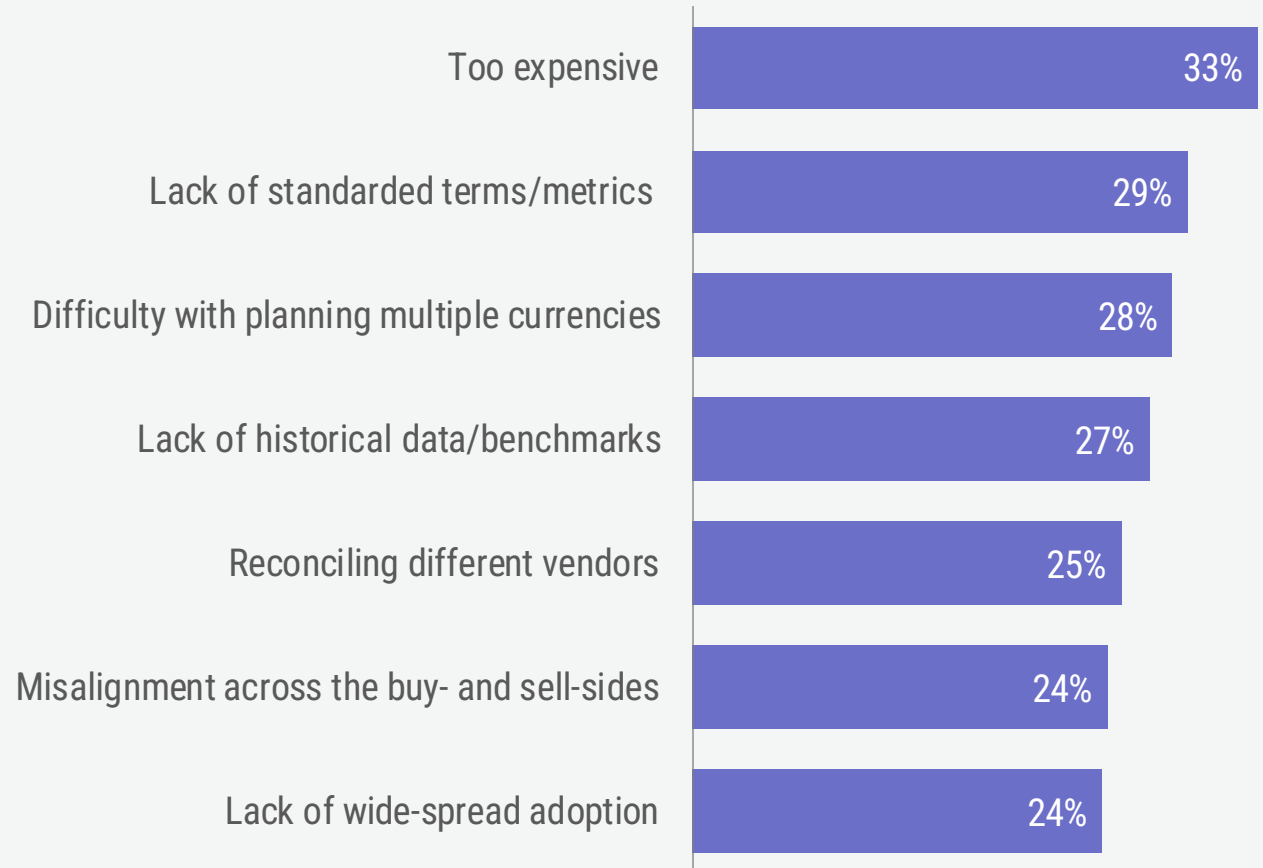
Despite the potential benefits of using alternative currencies, full adoption faces hurdles

The adoption of alternative currencies is challenged by cost, complexity, and cross-industry alignment.

“Currency reconciliation can be challenging since different currencies may use different valuation techniques and exchange rates.”
-Department Head, Small Spender, Agency



CHALLENGES TO USING ALTERNATIVE CURRENCIES



SECTION

5



RECAP



It is evident from this report that digital video will continue to be a go-to channel for advertisers looking to reach engaged audiences at scale across the purchase funnel.

Also evident is that the market is currently in a period of transition, moving from panel data to big data and onto modeled data for understanding performance, and from transacting with a single currency to using multiple currencies.

Additionally, although reach, ad quality, and measurement capabilities are top buyer considerations, the industry is heading towards one that places a higher premium on the ability of media partners to deliver business outcomes. Foundational to all of this is the need to improve and standardize approaches to measurement.

Innovation and collaboration are the keys to propelling Digital Video, the fastest growing channel in media, to reach its full potential for both the industry and viewers. This report is designed to inform and inspire the market to take the necessary steps to reach that potential.

SECTION
4



RECOMMENDATIONS

☰ Key Focus Areas (1 of 3)

DIVERSIFY VIDEO INVESTMENTS ACROSS FORMATS AND CHANNELS

KEY FINDING

The digital video landscape is increasingly fragmented, with substantial growth across short-form, long-form, creator-driven, and immersive content formats.

RECOMMENDATION

Advertisers should diversify their investments to encompass a wide range of video formats and channels. This includes short-form and vertical-oriented videos, which are seeing significant investment increases (accounting for 69% and 68% of buyers respectively). Advertisers can maximize reach and engagement by leveraging the unique strengths of each format and channel.

- Diversify video investments across CTV, OLV, and social video, incorporating short-form, long-form, immersive, and creator-driven content to cater to diverse audience interests and maximize reach.
- Utilize data-driven insights to allocate budgets dynamically across CTV, OLV, and social video channels.
- **Coming in 2025:**
 - IAB's Unified Media Planning Across Online Video, CTV, OTT, and FAST Best Practices Report, that will discuss strategies for creating cohesive media plans that integrate various video platforms.
 - IAB's best practices report on how to ignite a full funnel strategy with video shoppable ads.

☰ Key Focus Areas (2 of 3)

FOCUS ON BUSINESS OUTCOMES KPI

KEY FINDING

"Business outcomes" are the top KPI for TV/video buyers across social video (64%), OLV (58%), and CTV (54%).

RECOMMENDATION

Align video strategies with measurable goals and prioritize channels offering robust capabilities for outcome-based measurement, such as sales, website actions, and customer acquisition.

- Set clear outcome based KPIs for all video campaigns.
- Use advanced analytics to track and measure the impact of campaigns on business outcomes.
- Get involved in the conversation: Join IAB's [Digital Video Committee](#) which advocates for digital video and helps the industry grow, evolve, and innovate in shared issues and challenges.

EMBRACE PROGRAMMATIC FOR EFFICIENCY AND SCALE

KEY FINDING

Programmatic buying is the preferred method for CTV transactions, with 75% of buys being activated programmatically.

RECOMMENDATION

Leverage programmatic buying to enhance efficiency, optimize campaigns, and achieve scalable results. Programmatic buying provides better ROI, easier optimization, and more control over variables such as frequency capping.

- Increase programmatic adoption, especially for CTV, to streamline processes, optimize campaigns, and control frequency capping.
- Look for programmatic platforms offering granular audience targeting, real-time bidding, and robust optimization tools.
- Ensure high-quality data feeds into your programmatic campaigns for accurate targeting and measurement.
- **Coming in 2025**
 - IAB's Programmatic Standards to Measure CTV ad performance.

☰ Key Focus Areas (3 of 3)

ADDRESS MEASUREMENT CHALLENGES PROACTIVELY

KEY FINDING

Measurement issues remain prevalent, particularly with CTV and OLV, affecting placement transparency, co-viewing, and viewability.

A minimum of three out of four buyers requested that sellers provide greater transparency, offer performance-based solutions, grant access to first party data, help set new measurement standards.

RECOMMENDATION

Implement robust measurement frameworks and technologies. Use AI for campaign optimization, measurement, and fraud detection.

- Invest in advanced measurement tools and technologies, such as AI-driven analytics and cross-device measurement solutions.
- Establish standardized metrics and collaborate with industry stakeholders to improve measurement accuracy and transparency.
- Get involved in the conversation: Join IAB's [Advanced TV Committee](#) to help define, prioritize, and execute initiatives to facilitate the modernization of the TV/video ecosystem.

ADAPT TO THE RISE OF ALTERNATIVE CURRENCIES

KEY FINDING

Alternative currencies are gaining widespread interest, with 28% of buyers already transacting on them.

RECOMMENDATION

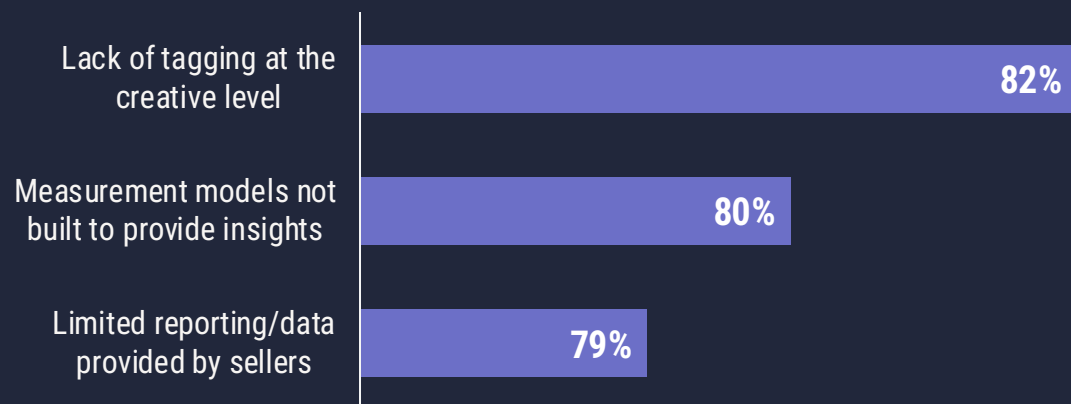
Embrace alternative currencies to gain a comprehensive view of digital video performance and improve multi-screen attribution. Experimenting with and adopting new currencies can provide more accurate and real-time reporting.

- Evaluate and test various alternative currencies and leverage the benefits of multi-screen attribution and real-time reporting offered by these currencies.
- Collaborate with measurement partners to integrate alternative currencies into your media planning and buying processes.

Work to establish ad creative tracking uniformity and standardization across the ecosystem to unlock higher ROI

A lack of tracking and structure of Ad IDs is driving the inability to tie ROI back to specific ad creatives. Currently, only 14% of buyers register all ad creatives, and 32% do so when required.

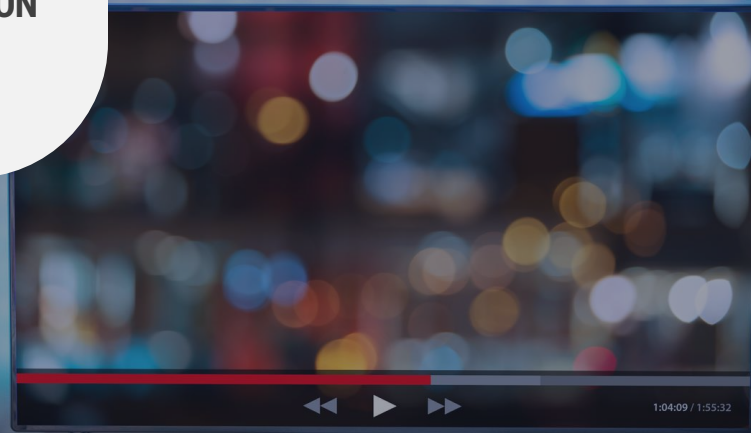
CHALLENGES TYING ROI BACK TO AD CREATIVE



86%

of advertisers believe that the ability to tie campaign performance to specific ad creatives could increase ROI by at least 10%

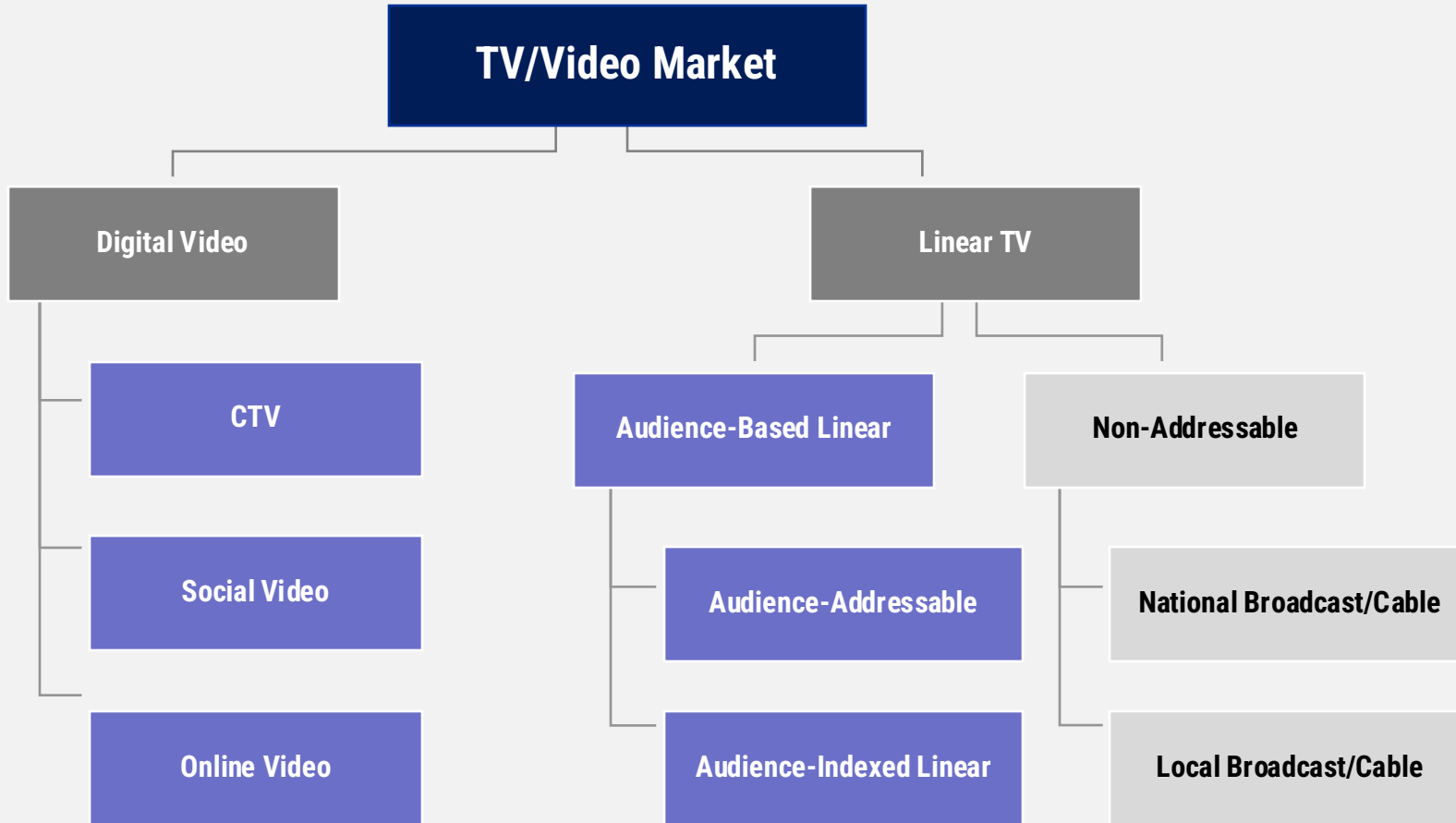
SECTION
5



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APPENDIX

TV/Video Classification Guide



TV/VIDEO TYPE KEY

- Audience-Based Addressable
- Non-Addressable

For detailed definitions, see the next slide

TV/Video Classification Guide: Detailed Definitions

DIGITAL VIDEO

- **CTV:** TV-like Internet-delivered content, typically long-form and delivered via a Smart TV or OTT device, via subscription or non-subscription streaming video services. Some inventory may be distributed in the mobile or desktop environments and includes the following:
 - **AVOD** or advertising-based video on demand:
 - Free ad-supported streaming TV services, aka FAST (e.g., Pluto TV, Tubi, Xumo)
 - Ad-supported paid subscription video services (e.g., Hulu, Paramount+)
 - **vMVPDs** or virtual multichannel video programming distributor (e.g., Hulu Live TV, YouTube TV, Sling)
- **Social video:** Short-form video shared on social platforms, including TikTok, Instagram, Facebook, Snap, Twitter, YouTube, and others
- **Online video:** Short-form video from web/app-based publishers

TELEVISION

- **National broadcast/cable TV:** Traditional linear TV, bought for distribution nationally. Households viewing the same shows see the same ad. This includes any data-driven linear TV bought for distribution.
- **Local broadcast/cable TV:** Traditional linear TV, bought for local (metro-level) programming; aka Spot TV. Households viewing the same shows see the same ad.
- **Audience-based linear TV**
 - **Audience addressable TV:** Allows advertisers to dynamically serve specific ads to specific households during scheduled linear TV programming, based on first-, second-, or third-party data such as location, behavior and demographics.
 - **Audience indexed linear TV:** Enables buyers to identify programs, networks, and dayparts with a high composition of the advertiser's target audience and build a buy more likely to reach that audience.

Methodology

Now in its eleventh year, IAB's *Digital Video Ad Spend & Strategy Report* provides a lens into the trends within the U.S. TV/video market and offers guidance for buyers and sellers on how they can position and differentiate their strategies based on the market opportunity.



Advertiser Perceptions Quantitative Sample Generated and Execution

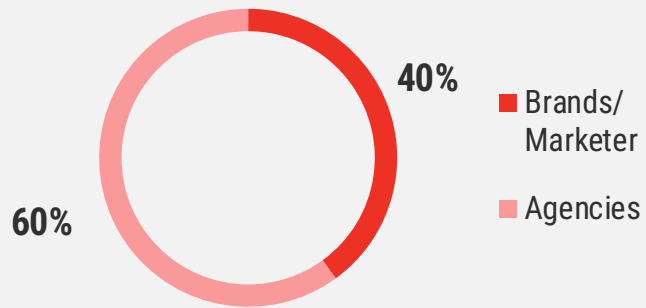
- 15-minute anonymous online survey, n=364
- Advertiser Perceptions leveraged its Ad Pros community and trusted third-party partners to recruit verified industry leaders, identified as those who:
 - Are involved in recommending, specifying, or approving advertising spending in digital video
 - Spent at least \$1 million on advertising in 2023
 - Work at agencies or directly for a brand marketer
- Fielded: February 15, 2024 – March 1, 2024

Guideline's Digital Video Ad Spend Market Size and Growth Rate Methodology

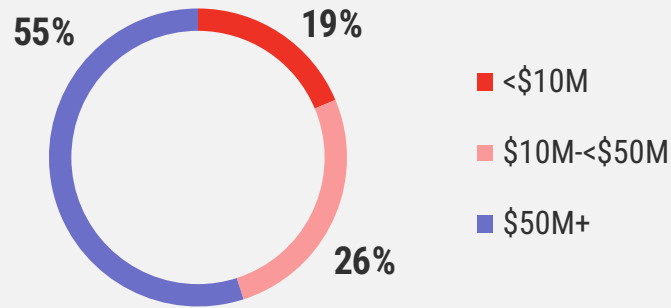
- Guideline's digital video ad spend market size and growth rate estimates are based on Guideline's Pool of ad billing data, including Forward Bookings (i.e., future, pre-booked media), the IAB-commissioned Advertiser Perceptions quantitative survey, interviews with industry leaders, and other market estimates.
- The Guideline pool's coverage of the U.S. advertising market is based on deterministic, census-level total media billings for all spending by the largest ad agencies, includes all six U.S. major holding groups and most of the largest independents.

Respondent Profile

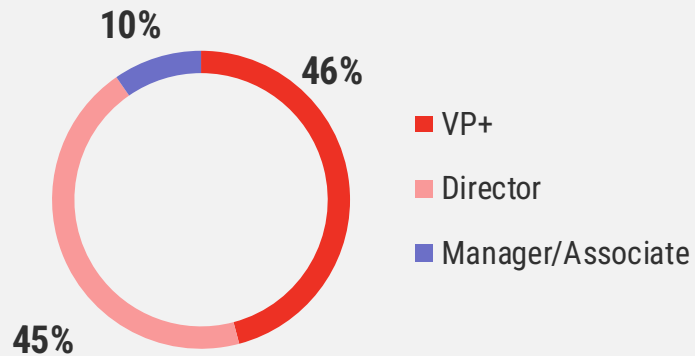
COMPANY TYPE



COMPANY SIZE (BASED ON ANNUAL MEDIA SPEND)



JOB TITLE



MARKET SECTORS

MARKET SECTORS	%
Technology	9%
Retail	9%
Health and Wellness	9%
Automotive	8%
CPG	8%
Financial Services	8%
Telecommunications	8%
Entertainment and Media	8%
Apparel/Fashion	8%
Home and Appliance	8%
Travel	8%
Other	8%

ABOUT IAB



The Interactive Advertising Bureau empowers the media and marketing industries to thrive in the digital economy. Its membership comprises more than 700 leading media companies, brands, agencies, and the technology firms responsible for selling, delivering, and optimizing digital ad marketing campaigns. The trade group fields critical research on interactive advertising, while also educating brands, agencies, and the wider business community on the importance of digital marketing.

In affiliation with the IAB Tech Lab, IAB develops technical standards and solutions. IAB is committed to professional development and elevating the knowledge, skills, expertise, and diversity of the workforce across the industry. Through the work of its public policy office in Washington, D.C., the trade association advocates for its members and promotes the value of the interactive advertising industry to legislators and policymakers. Founded in 1996, IAB is headquartered in New York City.

www.iab.com



ABOUT THE MEDIA CENTER



IAB Media Center's mission is to accelerate the seamless transition from traditional analog media channels to dynamic digital platforms.

By doing so, we aim to empower innovative business models while fostering a captivating and consumer-centric media and advertising experience. This includes:

- Continuing the development of the CTV marketplace: Supporting the evolution of programmatic CTV and use of data with standards and best practices.
- Enabling video measurement and collaboration: Evangelize/developing a Creative ID directory & guidelines (with Tech Lab) including legal/regulatory best practices
- Creating a cohesive video landscape: Standardizing the classification of video creative formats across platforms with key value metrics
- Fostering the development of digital audio and podcasting via the establishment and standardization of best practices related to creator-advertiser partnerships, integration of audio campaigns into omnichannel media plans, and ad creative.

IAB Media Center Video Board of Directors Member Companies

Amagi	Horizon Media	Publicis Media
Amazon Ads	Infillion	Roku
Butler Till	Initiative	RPA
Carat	Integral Ad Science	Quigley-Simpson
Comcast	Intuit	Samsung Ads
dentsu	LiveRamp, Inc.	Spark Foundry
Digitas LBI	Magnite	Spark Networks
Disney Advertising	National Football League	Spectrum Reach
Dotdash Meredith	NBCUniversal	TelevisaUnivision
Effectv	Netflix	The Coca-Cola Company
EssenceMediacom	Nexstar	TikTok
FreeWheel	Omnicom Media Group	Unilever
General Motors	Papa John's Pizza	VIZIO
Google	Paramount	VMLY&R
GroupM	Pfizer	Voya Financial
Harmelin Media	Publica	Warner Bros. Discovery

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We combined the leading media planning and data companies to create the world's most trusted set of solutions to help shape mission-critical advertising decisions. Though we already provide guidance to the world's leading brands, agencies, and media owners; we are just getting started.

We are busy innovating, expanding existing capabilities, and leveraging AI to offer automated, intelligent solutions to age-old industry processes.

As the industry leader, 25 out of the world's 30 largest brands and 9 of the top 10 most valuable global media owners rely on our solutions. Guideline provides critical data to the largest media measurement companies, demand-side platforms, and institutional investors. We partner with all six of the biggest agency holding companies, as well as several of the largest independents, analyzing over \$150 billion in annual media spend globally.

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