

# U.S. VIDEO BENCHMARKS

REPORT

FALL 2020 EDITION

INNOVLD



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# Introduction

Ready or not, 2020 has pushed us into a streaming-first era and the rise of Connected TV has reshaped the landscape. The onset of the COVID-19 pandemic has driven massive cord-cutting behavior by audiences who are not likely to revert back to traditional pay TV. In fact, [according to a recent study by Roku](#), not only did nearly 60 percent of U.S. households either reduce, cut, or never bothered to subscribe to linear TV, an overwhelming 92 percent are satisfied with their decision.

And where audiences go, advertisers follow. In April, when marketers were grappling with budget cuts and changes to creative, Innovid saw a 22 percent year-over-year increase in CTV ad impressions even as video overall saw declines as high as 14 percent. This trend has scaled over time, with 58 percent year-over-year growth observed in September.

So what does this ultimately mean for marketers? CTV has become table stakes for advertisers, many of which are finding themselves attempting to navigate a channel that in some ways is still just beginning to blossom.

Brands, agencies, and publishers should be laser-focused on how measurement, identity, interactive formats, and programmatic buying will develop over the next 12 months.

As the [first MRC-accredited company for OTT ad impression measurement](#), Innovid remains committed to helping brands navigate this new streaming-centric, omni-channel world by providing free weekly insights through our [Innovid IQ](#) dashboard, and now with our newly launched quarterly benchmarks that have an added focus on CTV.

We hope you enjoy this fall edition, and please subscribe for updates on [Innovid.com](#) so you never miss a new report.

Best,  
Jessica



**Jessica Hogue**  
GM, Measurement and Analytics  
Innovid

# 90-Day Replay

The holiday season is already upon us, and a lot has happened since we officially put away our summer shorts and bathing suits. Looking ahead, there's certainly a lot on the advertising to do list. For example, [according to the recent Forrester Wave report on creative advertising technologies](#),<sup>1</sup> marketers need to seek out true omni-channel support for rich media formats and think about how they will survive the inevitable cookieless digital environment. But that's just a snippet of what's on the minds of marketing executives. To this end, we've curated five key trends to watch from the previous quarter that should be helpful as you look to finalize planning for 2021.



## 1 TV Is Increasingly Becoming an Option for Performance Marketers

Interactive ad formats on CTV are transforming the channel beyond simply an awareness channel to one that can also address performance strategies.

“The second key trend we've seen is a growth of new advertisers or advertiser categories that want to take advantage of the surge in streaming. We mentioned in our earnings that just came out that our performance brand category, which are sort of DTC and direct response advertisers, grew more than 300 percent year-over-year in the second quarter.”

**Dan Robbins,**  
*VP of Ad Marketing and Partner Solutions at Roku*

 [Watch the Full Video](#)

<sup>1</sup> The Forrester Wave™: Creative Advertising Technologies, Q4 2020



## 2

### Brands Expect Media Partners to Help Develop Campaign Measurement

Omni-channel measurement is still in its infancy. Brands are looking to media and tech partners to help them update, refine, and develop how they measure and evaluate their campaigns.

“We have to find more ways and keep pushing to experiment to understand, to get better signals, and to get more of an illustration of what consumers are thinking and how they’re acting and reacting. **This requires testing and learning, building new ways to measure and actually stack your data and combine it so that you can correlate impact across lots of different touchpoints and behaviors.** I think what we’re all looking to do is test. Test new ways of measurement being pushed into places that we haven’t been able to do it before, and combine

this in an aggregate view that makes it more holistic and valuable. **And I’m not even just talking about media in this case. It could be connecting things with distribution, price points, and promotion information to make things more holistic so that we’re not just looking at one gauge when we have five or six things happening at the same time.”**

**Ron Amram,**  
*Senior Director of Global Media  
at Mars, Inc.*

[Watch the Full Video](#)

# 3

## The U.S. and China Continue to Lead in CTV Adoption and Innovation

While the U.S. and China lead the world in CTV, that doesn't mean marketers should count out other countries and regions. Top marketers are keeping an eye on correlations between geographies, while respecting the nuances and regulations of local markets.

**“The regulatory environment plays a huge role in which tactics end up being able to be deployed,** and how successful different channels are. So for example, in EMEA there are actually 20 or so countries, each with their own regulatory bodies, each with their own rules around privacy and how you can use identity targeting. It plays a big factor in how quickly they can adopt something new like CTV, but the U.K. is really having some fantastic momentum. It's been fascinating for me to see that Australia is actually quite similar to the U.S. in their adoption curve, and you see CTV is

going gangbusters. Many strategies that marketers use in the U.S. work in Australia, and vice versa. Things that are deployed in Australia can be successfully reused in the U.S. So **there are tons of synergies there for global marketers to take advantage of. I would say that of all the countries in the world, China is actually leading the globe in CTV.”**

**Crystal Eastman,**  
*Head of Global Marketing  
at The Trade Desk*

[Watch the Full Video](#)

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## Consumers Are More Willing to Share Their Data for More Personalized Ads—in Specific Circumstances

Personalization remains important to consumers, with 40 percent making purchases as a direct result of seeing a relevant ad. You cannot personalize without data, of course, which not only needs to follow privacy regulations but also has to be freely given in many cases. Luckily there's an upswing in the sentiment for the latter.

23%

say they are more willing to share information with brands than one to two years ago.

Consumers are most comfortable sharing **Likes/Dislikes, Gender, and Location data with brands.**

35%

want to dictate data collection preferences.

[Explore the Full Survey](#)

5

## Passive Messages Produce Passive Results

Creatives are swapping out passive push messaging for more interesting customer experiences. The true challenge is how to use technology to scale these experiences across platforms, devices, and audience segments.

“We know that passive interactions with messages, that's just something that isn't as effective as it used to be. And we need to now lean into something that's more interactive, that generates participation, or in some cases augments what already exists within that client's organization for enabling more commerce, or enabling more community.”

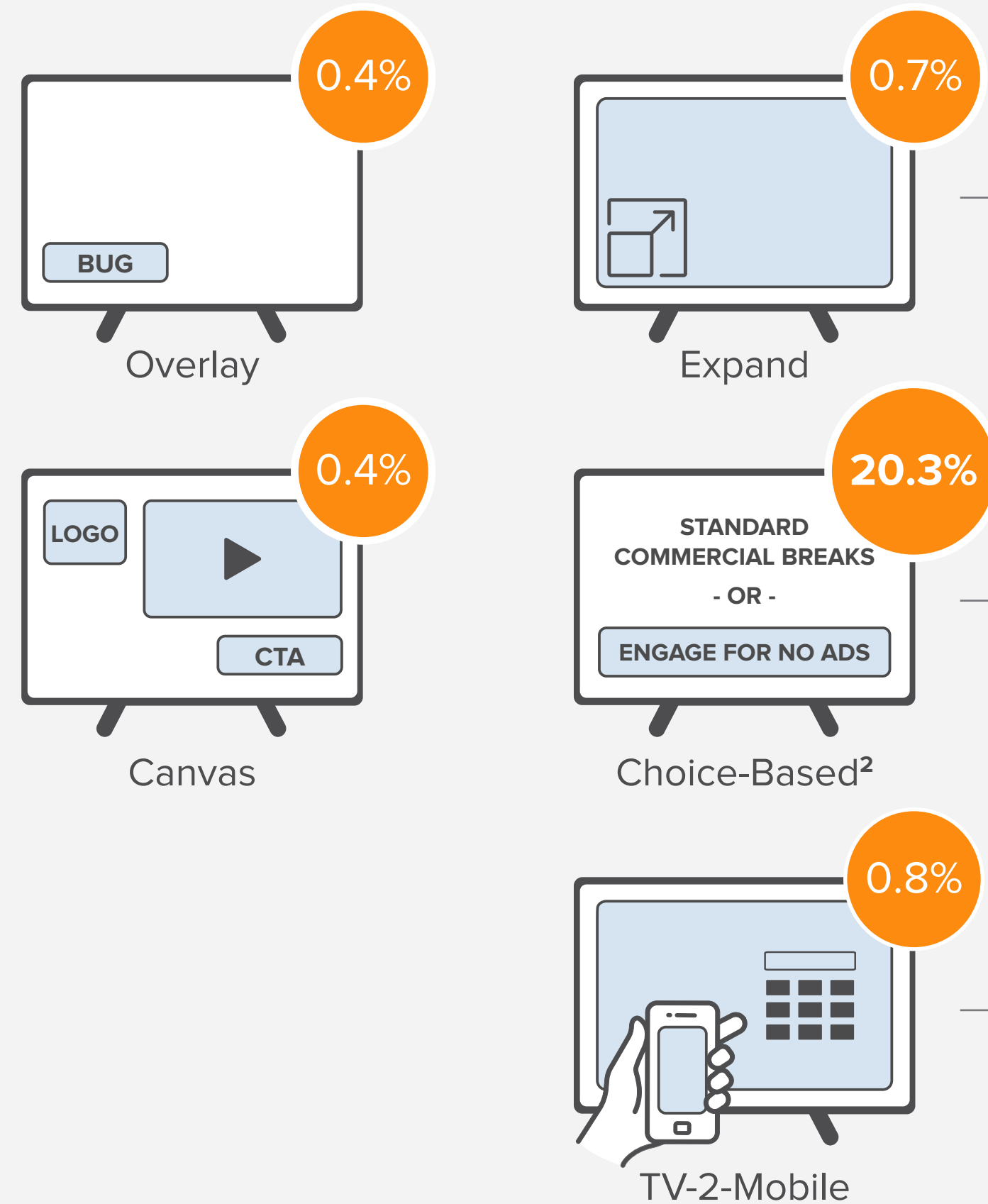
**Bohb Blair,**  
*Chief Experience Officer at Starcom*

[Watch the Full Video](#)

# CTV Interactive Insights

As you can imagine, we get a lot of questions about CTV. Typically there are three main metrics we look at for CTV interactive campaigns: engagement rate, time earned, and video duration.

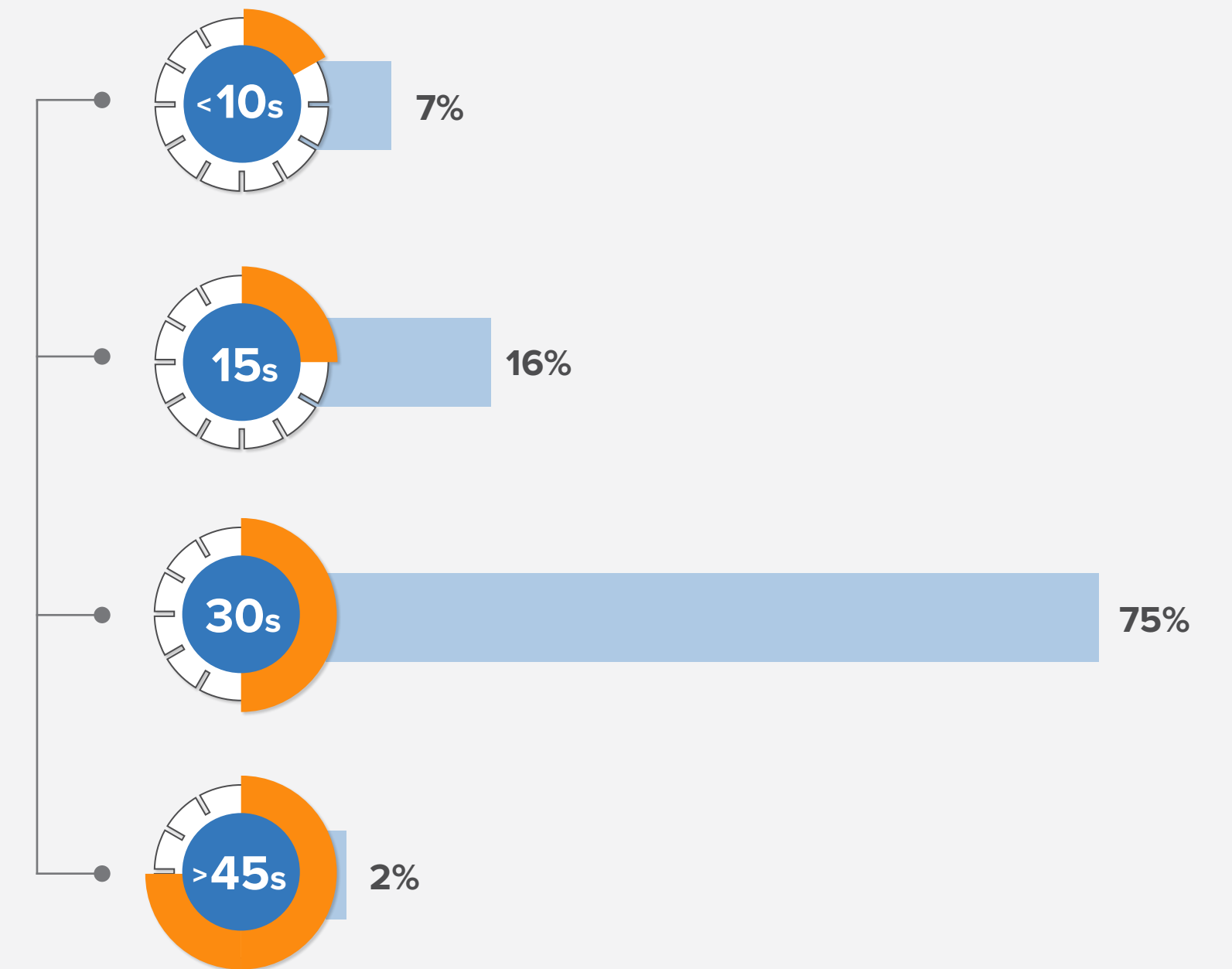
## Engagement Rate by Ad Format



## Time Earned by Ad Format



## Video Duration by Ad Length



<sup>2</sup> Choice-Based: By interacting with an Engagement Ad, viewers are given the ability to watch their content with significantly reduced ad loads while guaranteeing the full attention of the viewer with a marketing message.



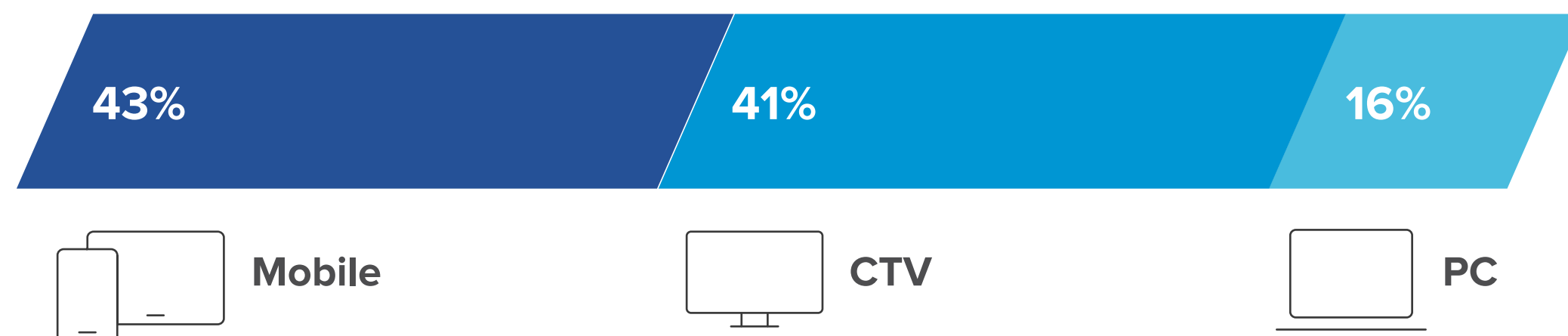
# Video Benchmarks

These quick-hit benchmarks are focused on device, ad format, and impression growth and represent a snapshot of what we've seen over the past 90 days.

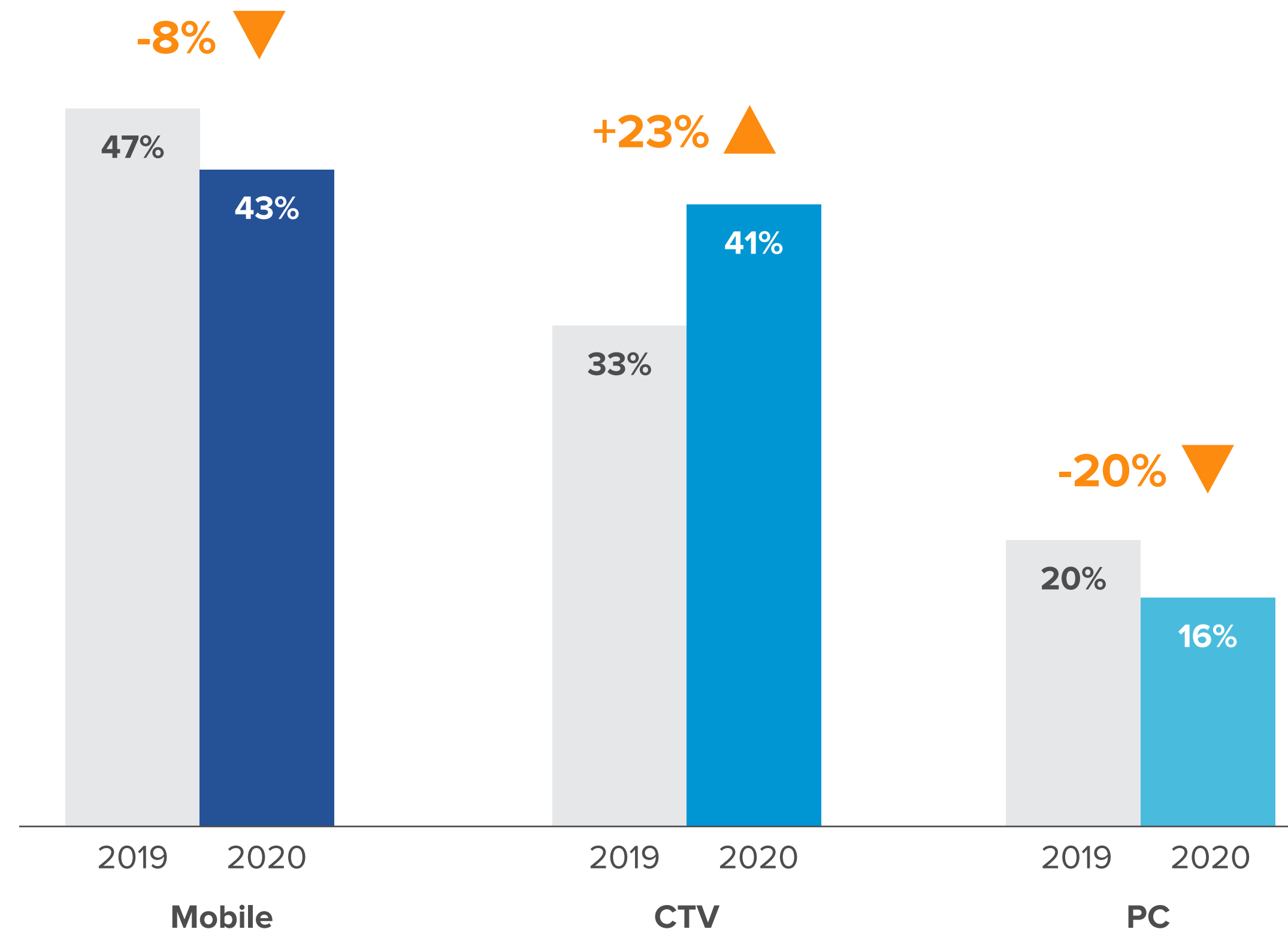
## Mobile Defends a Narrow Lead, While CTV Alone Wins More Impression Share

Looking at video impression share by device, mobile devices defended an extremely narrow lead of 2 points over CTV while PC impressions continue to trend downward. CTV is the only device that gained more impression share, jumping from 33 percent in 2019 to 41 percent in 2020.

### Video Impression Share by Device

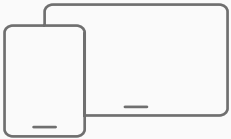




### Video Impression Year-Over-Year Change by Device



When analyzing growth by comparing standard and advanced video impressions, mobile had better growth with advanced video, while CTV dominated standard. We will be keeping an eye on this particular breakout as more marketers adopt CTV interactive formats.

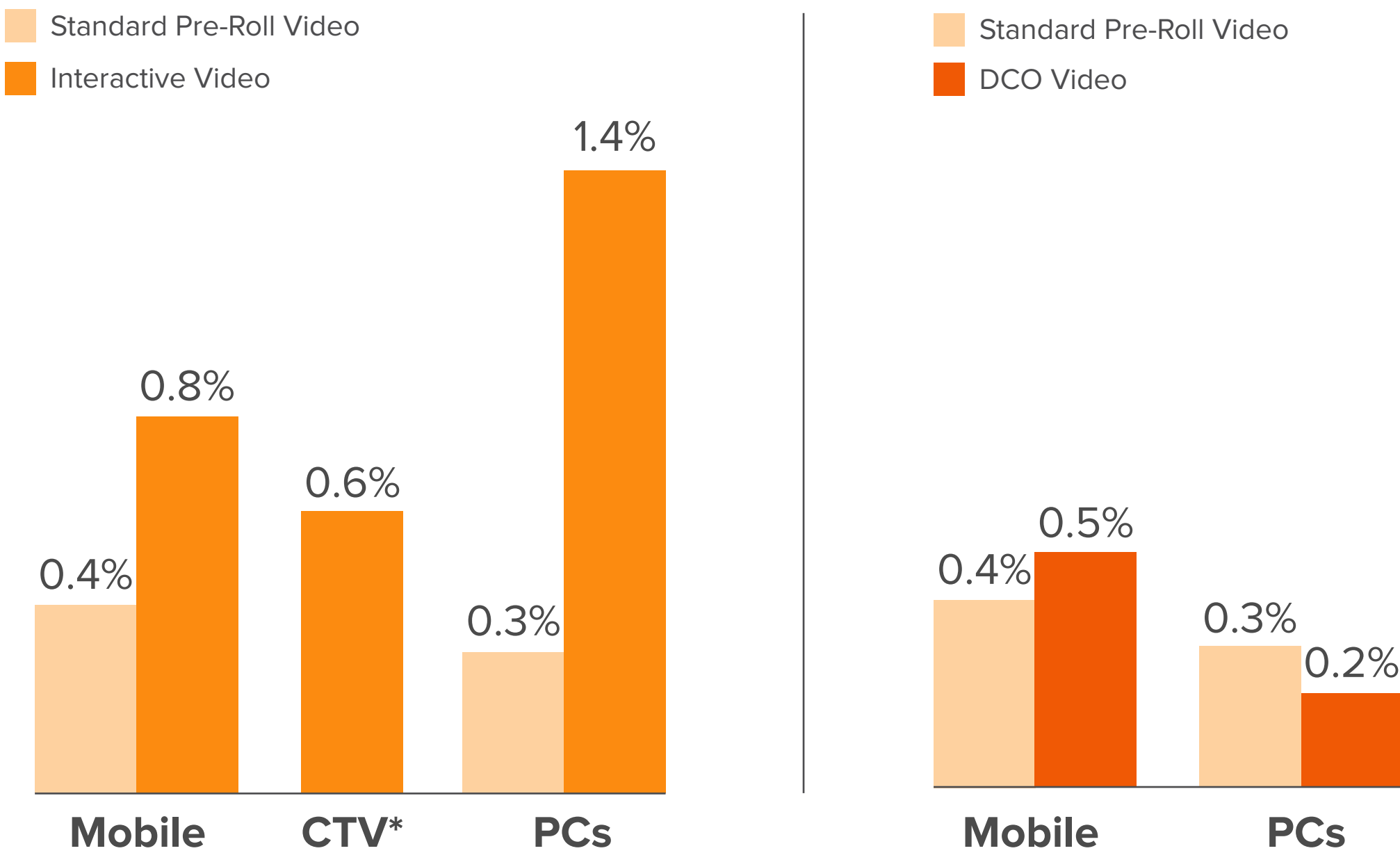
Year-Over-Year Video Impression Growth by Device and Format Type

	 Mobile	 CTV	 PCs
Overall	+17%	+55%	+1%
Standard Video	+17%	+56%	1%
Advanced Video	+27%	+18%	0%

Ads with Interactive Elements Clearly Produce Better Engagement

If there’s anything to take away from these engagement benchmarks, it’s that audiences want more than standard pre-roll and standard ads. Ads with choice and/or interactive elements easily outperformed other formats across each device category.

Engagement Rate by Device and Ad Format



Interactive CTV  
Choice-Based ads  
garnered a  
**20.3%**  
engagement rate

DCO Video performed  
**5x** better on Mobile  
than DCO display  
**2x** better on PCs  
than DCO display

\*Standard Pre-Roll and DCO Video running across CTV devices does not allow for click-throughs and therefore does not have engagement opportunities.



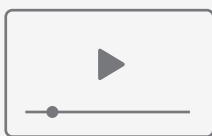
# CTV Boasts Highest Completion Rates, But PCs Surprisingly Come In Second

CTV continues to crush in completion rate, which is unsurprising given that viewers are forced to watch the ad to the end before they can see the rest of their programming. However, in the race for second place, PCs surprisingly managed to outshine mobile across all formats.

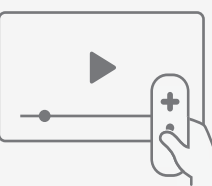
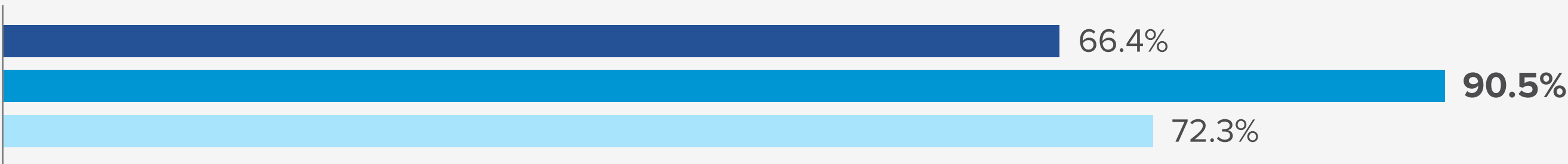


## Completion Rate by Ad Format and Device

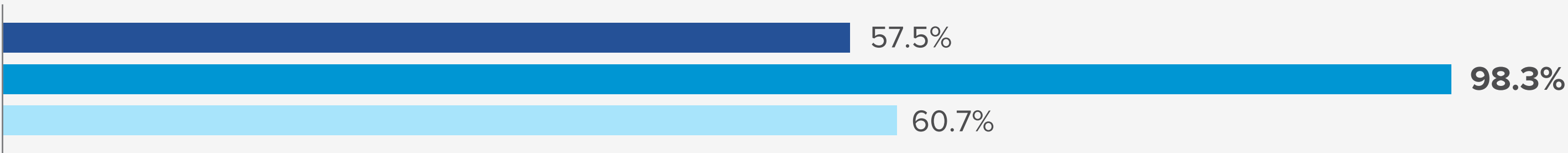
■ Mobile ■ CTV ■ PCs



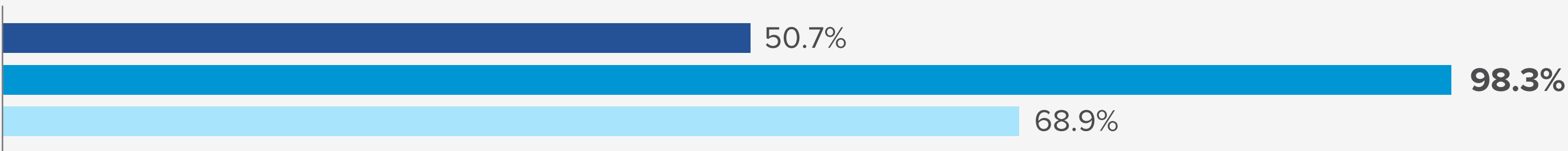
**Standard  
Pre-Roll Video**



**Interactive  
Video**



**DCO Video**



# More from Innovid

Explore more content, best practices, and news below:

## Content



Research & Reports

- [The Brand Marketer Starter Kit: Omni-Channel Personalization Edition](#)
- [The State of Connected TV Report 2020](#)



Video

- [New Tricks for the Marketing Mix](#)
- [An “Old Media” Mindset in a New Media World](#)
- [The Simple Science of Creativity](#)

## Best Practices



- [Innovid Introduces Dynamic Plug & Play Strategies to Simplify Personalization](#)
- [Marketers Need an Integrated Approach to Omni-Channel Personalization: Here's How](#)
- [Without Agility, Personalized Messaging Can't Keep Up with Consumers](#)

## News



- [Innovid Named a Leader in The Forrester Wave™: Creative Advertising Technologies, Q4 2020](#)
- [\[WSJ\] Streaming TV Is Surging, but the Ads Remain on Repeat](#)
- [\[Adweek\] Quibi Faces Uncertain Future as Year 2 Advertising Talks Loom](#)
- [\[Video Ad News\] Google Sizes Up Roku and Amazon with New CTV Products](#)
- [\[MediaPost\] CTV: The Next Walled Garden?](#)



# About This Report

Innovid analyzed over 60 billion advertising impressions served on our platform between July 1 and September 30, 2020. Researchers looked across mobile, desktop, CTV devices, and social platforms to compile the most complete picture of U.S. video advertising.

## About Innovid

Innovid is the only independent omni-channel advertising and analytics platform built for television. We use data to enable the personalization, delivery, and measurement of ads across the widest breadth of digitally enabled channels in the market, including TV, video, display, social, and OOH. Innovid serves a global client base of brands, agencies, and publishers through 12 offices across the Americas, Europe, and Asia-Pacific.

For ongoing video advertising trends, visit [Innovid iQ](#).

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### SOCIAL MEDIA

