

LEARNING MADE EASY



# YouTube<sup>TM</sup> Marketing

for  
**dummies**<sup>®</sup>  
A Wiley Brand



Explore ad buying, content marketing, and channels

Build a marketing campaign that works for your business

Evaluate your results and adapt for success

**Will Eagle**

*YouTube Brand and  
Marketing Strategist*





# YouTube™ Marketing

**by Will Eagle**

YouTube Brand & Marketing Strategist

for  
**dummies**®  
A Wiley Brand

## YouTube™ Marketing For Dummies®

Published by: **John Wiley & Sons, Inc.**, 111 River Street, Hoboken, NJ 07030-5774, [www.wiley.com](http://www.wiley.com)

Copyright © 2019 by John Wiley & Sons, Inc., Hoboken, New Jersey

Published simultaneously in Canada

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning or otherwise, except as permitted under Sections 107 or 108 of the 1976 United States Copyright Act, without the prior written permission of the Publisher. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at <http://www.wiley.com/go/permissions>.

**Trademarks:** Wiley, For Dummies, the Dummies Man logo, Dummies.com, Making Everything Easier, and related trade dress are trademarks or registered trademarks of John Wiley & Sons, Inc. and may not be used without written permission. YouTube is a trademark of Google, LLC. All other trademarks are the property of their respective owners. John Wiley & Sons, Inc. is not associated with any product or vendor mentioned in this book.

LIMIT OF LIABILITY/DISCLAIMER OF WARRANTY: THE PUBLISHER AND THE AUTHOR MAKE NO REPRESENTATIONS OR WARRANTIES WITH RESPECT TO THE ACCURACY OR COMPLETENESS OF THE CONTENTS OF THIS WORK AND SPECIFICALLY DISCLAIM ALL WARRANTIES, INCLUDING WITHOUT LIMITATION WARRANTIES OF FITNESS FOR A PARTICULAR PURPOSE. NO WARRANTY MAY BE CREATED OR EXTENDED BY SALES OR PROMOTIONAL MATERIALS. THE ADVICE AND STRATEGIES CONTAINED HEREIN MAY NOT BE SUITABLE FOR EVERY SITUATION. THIS WORK IS SOLD WITH THE UNDERSTANDING THAT THE PUBLISHER IS NOT ENGAGED IN RENDERING LEGAL, ACCOUNTING, OR OTHER PROFESSIONAL SERVICES. IF PROFESSIONAL ASSISTANCE IS REQUIRED, THE SERVICES OF A COMPETENT PROFESSIONAL PERSON SHOULD BE SOUGHT. NEITHER THE PUBLISHER NOR THE AUTHOR SHALL BE LIABLE FOR DAMAGES ARISING HEREFROM. THE FACT THAT AN ORGANIZATION OR WEBSITE IS REFERRED TO IN THIS WORK AS A CITATION AND/OR A POTENTIAL SOURCE OF FURTHER INFORMATION DOES NOT MEAN THAT THE AUTHOR OR THE PUBLISHER ENDORSES THE INFORMATION THE ORGANIZATION OR WEBSITE MAY PROVIDE OR RECOMMENDATIONS IT MAY MAKE. FURTHER, READERS SHOULD BE AWARE THAT INTERNET WEBSITES LISTED IN THIS WORK MAY HAVE CHANGED OR DISAPPEARED BETWEEN WHEN THIS WORK WAS WRITTEN AND WHEN IT IS READ.

For general information on our other products and services, please contact our Customer Care Department within the U.S. at 877-762-2974, outside the U.S. at 317-572-3993, or fax 317-572-4002. For technical support, please visit <https://hub.wiley.com/community/support/dummies>.

Wiley publishes in a variety of print and electronic formats and by print-on-demand. Some material included with standard print versions of this book may not be included in e-books or in print-on-demand. If this book refers to media such as a CD or DVD that is not included in the version you purchased, you may download this material at <http://booksupport.wiley.com>. For more information about Wiley products, visit [www.wiley.com](http://www.wiley.com).

Library of Congress Control Number: 2018968030

ISBN 978-1-119-54134-9 (pbk); ISBN 978-1-119-54135-6 (ePDF); ISBN 978-1-119-54136-3 (epub)

Manufactured in the United States of America

10 9 8 7 6 5 4 3 2 1

# Contents at a Glance

---

<b>Introduction</b> .....	1
<b>Part 1: Getting Started with YouTube Marketing</b> .....	5
CHAPTER 1: YouTube in the Marketing Mix .....	7
CHAPTER 2: Using YouTube for Your Business .....	17
CHAPTER 3: Targeting Your Audience .....	35
<b>Part 2: Advertising Campaigns on YouTube</b> .....	57
CHAPTER 4: Advertising Formats .....	59
CHAPTER 5: Developing Your Ad Strategy .....	75
CHAPTER 6: Ad Creative Fundamentals .....	93
CHAPTER 7: Buying Paid Ad Media .....	109
<b>Part 3: Planning Your Content Strategy</b> .....	135
CHAPTER 8: Exploring Video Content Formats .....	137
CHAPTER 9: Developing Your Content Strategy .....	173
CHAPTER 10: Content Fundamentals .....	197
<b>Part 4: Making Videos for Ad Campaigns and Content</b> ...	211
CHAPTER 11: Creating Video .....	213
CHAPTER 12: Curating, Collaborating, and Outsourcing .....	235
<b>Part 5: Working with YouTube Channels</b> .....	245
CHAPTER 13: Launching Your YouTube Channel .....	247
CHAPTER 14: Publishing Your Videos .....	267
CHAPTER 15: Channel Management .....	283
<b>Part 6: Measuring Success</b> .....	299
CHAPTER 16: Ad Campaign Metrics That Matter .....	301
CHAPTER 17: Content Metrics That Matter .....	321
<b>Part 7: The Part of Tens</b> .....	335
CHAPTER 18: The Ten Biggest Mistakes People Make .....	337
CHAPTER 19: The Ten Most Popular YouTubers .....	345
<b>Index</b> .....	351



# Table of Contents

<b>INTRODUCTION</b> .....	1
About This Book .....	1
Foolish Assumptions .....	2
Icons Used in This Book .....	3
Beyond the Book .....	3
Where to Go from Here .....	4
<b>PART 1: GETTING STARTED WITH YOUTUBE MARKETING</b> .....	5
<b>CHAPTER 1: YouTube in the Marketing Mix</b> .....	7
YouTube Is Important for Marketers .....	7
YouTube is big and growing fast .....	8
The benefits of YouTube's big data .....	8
YouTube's place in your marketing mix .....	9
Using YouTube in Marketing .....	10
Advertising versus content marketing .....	10
Picking a lane .....	11
The Secret Formula for YouTube Success .....	12
Creating a brief to reach the right people .....	12
Harnessing the power of video ads .....	13
Developing your content strategy .....	13
Making great videos .....	14
Mastering YouTube management .....	14
Measuring success .....	15
<b>CHAPTER 2: Using YouTube for Your Business</b> .....	17
Capturing All Your Business Challenges .....	17
Defining Your Campaign Type .....	19
Brand awareness and reach .....	21
Brand and product consideration .....	22
Engagement .....	22
Conversion .....	23
Loyalty and advocacy .....	25
Determining Your Budget for Media and Production .....	27
Breaking down your annual budget .....	28
Taking the 70/20/10 approach .....	28
Calculating your production budget .....	28
Setting your media budget .....	29
The Necessary Nature of the Brief .....	30

Developing the Key Components of a YouTube Brief . . . . .	31
About the campaign . . . . .	31
Campaign or initiative’s needs . . . . .	32
Deliverables and considerations . . . . .	33
<b>CHAPTER 3: Targeting Your Audience . . . . .</b>	<b>35</b>
Creating a Picture of Your Target Audience . . . . .	35
Gaining Insights into Your Audience . . . . .	37
Insights . . . . .	38
Dove’s Campaign for Real Beauty . . . . .	39
Developing Audience Insights . . . . .	40
The Four C Framework for Insights . . . . .	41
Consumer . . . . .	41
Category . . . . .	42
Competitor . . . . .	43
Culture . . . . .	43
The Best Tools and Resources for Insights . . . . .	44
Trending on YouTube . . . . .	45
Google Trends . . . . .	47
Google Surveys . . . . .	52
Social media and comments . . . . .	56
<b>PART 2: ADVERTISING CAMPAIGNS ON YOUTUBE . . . . .</b>	<b>57</b>
<b>CHAPTER 4: Advertising Formats . . . . .</b>	<b>59</b>
YouTube’s Ad Format Offerings . . . . .	59
Display ads . . . . .	60
Image ads . . . . .	61
Skippable video ads . . . . .	62
Non-skippable video ads . . . . .	65
Midroll ads . . . . .	66
Bumper ads . . . . .	66
The YouTube Masthead . . . . .	68
Google Preferred . . . . .	69
The Google Display Network . . . . .	70
Being Aware of the Ad Policy . . . . .	71
Prohibited content . . . . .	72
Prohibited practices . . . . .	72
Restricted content . . . . .	73
Editorial and technical quality standards . . . . .	74



<b>CHAPTER 5: Developing Your Ad Strategy</b> .....	75
Developing Your Marketing Messages .....	75
Discovering Micro-Moments .....	76
“I want to know” moments .....	78
“I want to do” moments .....	79
“I want to buy” moments .....	80
“I want to go” moments .....	80
Buying Paid Media .....	81
Doing it yourself .....	82
Using a media agency .....	83
Exploring Pricing Models .....	84
Cost per thousand (CPM) .....	84
Cost per view (CPV) .....	86
Cost per acquisition (CPA) .....	87
Placing Your Media Buy .....	88
Auction .....	88
Reserve .....	90
Scheduling Campaigns .....	91
<b>CHAPTER 6: Ad Creative Fundamentals</b> .....	93
YouTube Is Not TV .....	93
The story arc of a TV spot .....	94
The story arc of a YouTube ad .....	95
Gathering Your Marketing Essentials .....	96
Your messages .....	96
Your brand assets .....	97
Existing video assets .....	98
Your mandatories .....	99
Following the Rules of a Great YouTube Ad .....	100
Getting attention .....	100
Clearly branding .....	103
Making a connection .....	103
Giving specific direction .....	104
Testing Video Ad Creative .....	105
Testing marketing messages .....	105
Testing video creative .....	106
<b>CHAPTER 7: Buying Paid Ad Media</b> .....	109
Getting to Know Google Ads .....	109
Signing up with Google Ads .....	110
Getting a tour .....	110
Setting Up Video Campaigns .....	110
Driving leads .....	117
Delivering website traffic .....	118

Growing product and brand consideration . . . . .	118
Creating brand awareness and reach . . . . .	119
Designing your own custom campaign . . . . .	121
Navigating the Google Ads Interface . . . . .	121
Overview . . . . .	122
Recommendations . . . . .	122
Campaigns . . . . .	123
Ad groups . . . . .	123
Ads & extensions . . . . .	124
Videos . . . . .	127
Landing pages . . . . .	127
Keywords . . . . .	127
Audiences . . . . .	128
Demographics . . . . .	129
Topics . . . . .	129
Placements . . . . .	130
Settings . . . . .	131
Locations . . . . .	131
Ad schedule . . . . .	131
Devices . . . . .	131
Advanced bid adjustment . . . . .	132
Change history . . . . .	132
Exploring More Google Ads Features . . . . .	132
Tools . . . . .	133
Bulk actions . . . . .	133
Measurement . . . . .	133
Setup . . . . .	134

**PART 3: PLANNING YOUR CONTENT STRATEGY . . . . . 135**

<b>CHAPTER 8: Exploring Video Content Formats . . . . .</b>	<b>137</b>
Educate, Entertain, Inspire . . . . .	138
People Visit YouTube for Education . . . . .	138
Is an educational video the right format for your content? . . . .	140
Types of educational videos . . . . .	140
The distinction between edutainment and how-to . . . . .	148
A checklist for making educational videos . . . . .	149
People Visit YouTube for Entertainment . . . . .	150
Is an entertainment video the right format for your content? . .	151
Types of entertainment videos . . . . .	153
Lean in versus lean back . . . . .	163
A checklist for entertainment videos . . . . .	164

People Visit YouTube for Inspiration . . . . .	166
Case studies . . . . .	166
Is an inspiration video the right format for your content? . . . . .	170
A checklist for making inspirational videos . . . . .	171
Connecting Formats to a Content Strategy . . . . .	172
<b>CHAPTER 9: Developing Your Content Strategy . . . . .</b>	<b>173</b>
Having a Brand Purpose. . . . .	173
Applying Brand Purpose to Your YouTube Channel . . . . .	174
Choosing Your Themes. . . . .	175
Generating theme ideas. . . . .	176
Lowe’s Home Improvement. . . . .	177
Enjoying a Popular Niche . . . . .	180
Benefitting from a popular niche . . . . .	180
Finding a popular niche . . . . .	182
Exploring Trending and Evergreen Videos. . . . .	184
Trending videos . . . . .	185
Evergreen videos . . . . .	185
Making the choice . . . . .	187
Distributing Content . . . . .	187
Giving Structure to Your Content Choices. . . . .	188
Hero videos . . . . .	189
Hub videos . . . . .	190
Help videos. . . . .	193
Mapping Video to Your Marketing Calendar . . . . .	196
<b>CHAPTER 10: Content Fundamentals . . . . .</b>	<b>197</b>
Make Your Videos Shareable . . . . .	198
Take a Conversational Approach . . . . .	200
Involve Your Audience with Interactivity . . . . .	201
Always Be Consistent . . . . .	203
Target Your Audience’s Interests . . . . .	205
Make Sure It’s Sustainable . . . . .	206
Maximize Your Chances of Discoverability . . . . .	207
Make Your Videos Accessible. . . . .	208
Strive for Authenticity . . . . .	208
<b>PART 4: MAKING VIDEOS FOR AD CAMPAIGNS AND CONTENT . . . . .</b>	<b>211</b>
<b>CHAPTER 11: Creating Video . . . . .</b>	<b>213</b>
Gathering Your Gear. . . . .	213
Cameras . . . . .	214
Audio . . . . .	216

Lighting . . . . .	218
Tripods . . . . .	220
Preparing for Production . . . . .	221
Developing your idea . . . . .	221
Storyboarding your vision . . . . .	222
Crafting your script . . . . .	224
Developing your shot list . . . . .	225
Choosing locations . . . . .	226
Creating the call sheet . . . . .	226
Tallying up costs . . . . .	227
Ensuring legal compliance . . . . .	227
Shooting Your Video . . . . .	227
Planning the shot. . . . .	228
Composition . . . . .	228
B-roll . . . . .	229
Continuity . . . . .	229
Editing Your Video . . . . .	230
Editing process. . . . .	230
Exploring Advanced Video Options. . . . .	232
Livestreaming. . . . .	232
360-degree video. . . . .	233
Virtual reality . . . . .	234
<b>CHAPTER 12: Curating, Collaborating, and Outsourcing . . . . .</b>	<b>235</b>
Getting Someone to Make Videos for You. . . . .	235
Advertising and marketing agencies. . . . .	236
Video production companies. . . . .	237
Local freelancers . . . . .	237
Online marketplace services . . . . .	238
Video creation tools . . . . .	240
Collaborating on Videos . . . . .	240
Email a YouTuber directly. . . . .	242
Work with a multichannel network (MCN). . . . .	242
Use a YouTuber marketplace. . . . .	242
Curating Other People’s Videos. . . . .	243
<b>PART 5: WORKING WITH YOUTUBE CHANNELS . . . . .</b>	<b>245</b>
<b>CHAPTER 13: Launching Your YouTube Channel . . . . .</b>	<b>247</b>
Creating Your YouTube Channel. . . . .	247
Customizing Your Channel. . . . .	249
Adding a banner image . . . . .	250
Adding links to your banner. . . . .	251

Editing your channel icon . . . . .	251
Adding your channel description . . . . .	252
Digging Deeper into Channel Customization . . . . .	254
About tab . . . . .	254
Channels tab . . . . .	255
Discussion or Community tab . . . . .	256
Home tab shelves . . . . .	258
Channel trailer . . . . .	260
Making Money from Your YouTube Channel . . . . .	261
The YouTube Partner Program . . . . .	262
Other ways to make money . . . . .	265
<b>CHAPTER 14: Publishing Your Videos . . . . .</b>	<b>267</b>
Writing Compelling Titles . . . . .	267
The hook, explanation, and information . . . . .	268
The question . . . . .	268
The statement . . . . .	268
The clickbait . . . . .	269
Crafting a Quality Video Description . . . . .	269
Adding Tags . . . . .	270
Customizing Your Thumbnail . . . . .	271
Uploading Videos . . . . .	272
Improving Your Videos with Advanced Customization . . . . .	275
Applying enhancements . . . . .	276
Adding audio . . . . .	278
Adding end screen and annotations . . . . .	278
Adding cards . . . . .	280
Modifying subtitles/CC . . . . .	281
<b>CHAPTER 15: Channel Management . . . . .</b>	<b>283</b>
Introducing Creator Studio Classic . . . . .	283
Dashboard . . . . .	285
Video Manager . . . . .	285
Live Streaming . . . . .	285
Community . . . . .	286
Channel . . . . .	289
Analytics . . . . .	291
Translations and Transcriptions . . . . .	291
Create . . . . .	292
Your contributions . . . . .	293
Auditing and Updating an Existing Channel . . . . .	293
Channel art . . . . .	293
Text areas of your channel . . . . .	294
Video organization . . . . .	294

Being in Good Standing . . . . .	295
Copyright strikes . . . . .	296
Community strikes . . . . .	297
<b>PART 6: MEASURING SUCCESS . . . . .</b>	<b>299</b>
<b>CHAPTER 16: Ad Campaign Metrics That Matter . . . . .</b>	<b>301</b>
Getting to Know Google Ads Reports . . . . .	302
Using predefined reports . . . . .	302
Creating a custom report . . . . .	308
Creating a custom dashboard . . . . .	309
Scheduling reports . . . . .	310
Measuring the Metrics That Matter . . . . .	311
Brand awareness and reach metrics . . . . .	312
Brand and product consideration metrics . . . . .	313
Website traffic and leads . . . . .	315
Optimizing Your Ad Campaign . . . . .	317
Tweaking your creative . . . . .	317
Experimenting with ad formats . . . . .	318
Targeting new audiences . . . . .	318
Modifying campaign settings . . . . .	319
Altering bidding and budgets . . . . .	320
<b>CHAPTER 17: Content Metrics That Matter . . . . .</b>	<b>321</b>
Getting to Know YouTube Analytics . . . . .	321
Revenue Reports . . . . .	323
Watch Time Reports . . . . .	324
Watch time . . . . .	324
Impressions and click-through rate . . . . .	325
YouTube Premium . . . . .	326
Audience retention . . . . .	326
Demographics . . . . .	326
Playback locations . . . . .	327
Traffic sources . . . . .	327
Devices . . . . .	327
Live streaming . . . . .	328
Translations . . . . .	328
Interaction Reports . . . . .	329
Subscribers . . . . .	329
Likes and dislikes . . . . .	330
Videos in playlists . . . . .	330
Comments . . . . .	330
Sharing . . . . .	331
Annotations . . . . .	331

Cards . . . . .	331
End screens . . . . .	332
Using Reports to Optimize Your Videos . . . . .	332
Increasing watch time and views . . . . .	332
Growing your audience . . . . .	332
Getting more subscribers . . . . .	333
Maintaining your YouTube Channel . . . . .	333
<b>PART 7: THE PART OF TENS . . . . .</b>	<b>335</b>
<b>CHAPTER 18: The Ten Biggest Mistakes People Make . . . . .</b>	<b>337</b>
Trying to Do Too Much . . . . .	337
Failing to Set Success Criteria . . . . .	338
Forgetting about the Audience . . . . .	339
Neglecting to Make Creative for YouTube . . . . .	340
Thinking Paid Media Is Optional . . . . .	340
Coycatting . . . . .	341
Ignoring the Basics of Quality Video Production . . . . .	341
Making Once, Distributing Once . . . . .	342
Giving Up Too Early . . . . .	342
Slacking Off Optimization . . . . .	343
<b>CHAPTER 19: The Ten Most Popular YouTubers . . . . .</b>	<b>345</b>
PewDiePie . . . . .	346
Dude Perfect . . . . .	346
Smosh . . . . .	346
Markiplier . . . . .	347
Nigahiga . . . . .	347
Ninja . . . . .	347
JennaMarbles . . . . .	348
Logan Paul Vlogs . . . . .	348
Shane . . . . .	348
Jake Paul . . . . .	349
<b>INDEX . . . . .</b>	<b>351</b>





# Introduction

---

**Y**ouTube is one of the most versatile and exciting marketing platforms available today. This book is your guide to putting YouTube to work for you so that you can grow your business, tell the world about your brand, generate leads to sell more products or services, and reach new audiences who want to hear from you.

Chances are, you've already tried traditional marketing approaches, such as print, radio, TV advertising, or digital marketing. Maybe you've run some ads on Facebook or even set up a paid search campaign with Google. YouTube is often one of the last digital channels that marketers tackle. Why? Well, making video seems hard, and YouTube is pretty vast, so where do you start?

With this book, of course! This book demystifies the idea that YouTube is more challenging as a marketing platform and provides you with all the answers to your questions.

One thing is certain: YouTube is an indispensable part of the marketing mix. It's the world's largest video platform, has 400 hours of content uploaded every minute, and more than 1 billion visitors every month. You're a marketer, and the people you want to reach are on YouTube.

## About This Book

---

Even though YouTube offers one of the most sophisticated advertising platforms in the world, this book is a simple explanation of the key concepts, principles, and approaches to using YouTube to your advantage. This book isn't meant to be read from cover to cover (although you can if you want!) but instead used as a reference that you can dip in and out of, depending on what you need to achieve.

I've written this book for all types of marketers, from the marketer who works in the marketing department at a Fortune 500 company, to the independent business owner who wears every hat, to the student of marketing just getting familiar with the landscape.

To help you navigate this book and absorb the key concepts, I did follow a few conventions:

- » If I provide an example of how to say something, I use *italics* to indicate a placeholder, as in *your company name*, which means that you need to replace the italics with your own information.
- » I also use *italics* for terms that are being defined.
- » I also use *italics* for phrases you need to search for on Google.
- » Web addresses appear in monofont. If you're reading a digital version of this book on a device connected to the Internet, you can click the live link to visit a website, like this: [www . youtube . com](http://www.youtube.com)

YouTube is improving the platform every day, and so things may change, but don't worry: The principles stay the same, even if a button has moved. This book is as much about the theory and practical principles behind how to use YouTube successfully as it is about providing a step-by-step guide to navigate YouTube's tools and features.

## Foolish Assumptions

I've made a few assumptions about you as I've written this book:

- » **You're a marketer who has specific goals you need to achieve.** Perhaps you need to sell more of your products, encourage more signups to a service you offer, to get more people to visit your bricks and mortar store, or want to let more people know about your brand.
- » **You've tried other marketing techniques.** Some of these techniques have worked well, while others haven't performed how you'd hoped. You're now considering YouTube to see what it can do for your marketing needs.
- » **You like a plain speaker.** While the industry excels at creating overly complicated terms for simple concepts, you're interested in delivering results. You know that plainly spoken, practical advice with guiding steps is the easiest way to get from A to B. I call out jargon when it's useful to know but keep things as straightforward as possible.

» **You're willing to give YouTube a go.** This last one is the most important assumption I've made. Even though I firmly believe YouTube is a crucial part of the marketing mix and that it offers simple solutions to get started, you can easily feel overwhelmed by all the options YouTube offers. My advice is to start somewhere simple. You don't have to do everything all at once.

## Icons Used in This Book

Icons in this book are used to mark important things along the way:



TIP

The Tip icon calls out my top tips and shortcuts for success.



REMEMBER

The Remember icon identifies key concepts and foundational principles that you'll want to keep in mind.



WARNING

The Warning icon appears to warn you about common mistakes — and the threat of certain doom.



TECHNICAL  
STUFF

The Technical Stuff icon marks high-level information that you don't have to know to understand the concept at hand (but you may be interested in it!). Feel free to skip any text marked with this icon.

## Beyond the Book

In addition to what you're reading right now, this product also comes with a free access-anywhere Cheat Sheet that gives you pointers on responding to comments on your videos, optimizing your SEO, using thumbnails and titles to get more clicks, using YouTube as a marketing channel, and creating viral videos. To get this Cheat Sheet, simply go to [www.dummies.com](http://www.dummies.com) and search for "YouTube Marketing For Dummies Cheat Sheet" in the Search box.

# Where to Go from Here

---

You don't need to read this book from start to finish, although you can. Instead, you can scan the table of contents and pick where it makes sense to start. Here are a few more suggestions:

- » If you're completely new to the idea that YouTube is a marketing tool, check out Part 1.
- » To find out more about YouTube's advertising platform, see Part 2.
- » For help developing a content strategy, go to Part 3 .
- » Check out Part 4 when you're ready to make a video.
- » Make sure you measure the success of your marketing efforts by going to Part 5.

# 1 Getting Started with YouTube Marketing

## **IN THIS PART . . .**

Discover why YouTube is an important marketing channel.

Choose how you'll use YouTube for your business and marketing needs.

Distinguish between advertising and content strategies.

Make campaign choices and determine your budget.

Create your marketing brief to guide all your efforts.

Develop actionable insights about your target audience.

#### IN THIS CHAPTER

- » Finding out about YouTube's power as a marketing channel
- » Deciding how you'll use YouTube
- » Distinguishing between brand, performance, advertising, and content
- » Discovering the secret formula for success

## Chapter **1**

# YouTube in the Marketing Mix

In this chapter, I demystify some misconceptions about YouTube as a marketing tool and explain why YouTube (along with Google search) is probably the most important and sophisticated marketing channel available to marketers today. Few other platforms offer the depth of potential offered by YouTube.

I also ask you to pick your lane to decide how you'd like to use YouTube in a way that's manageable for you, walk through the differences between advertising and content as marketing approaches, and show how YouTube will fit into your marketing calendar.

## YouTube Is Important for Marketers

The first thing to know about YouTube as a marketing channel is that the people you'd like to talk visit YouTube anywhere from several times a month to several times a day.

The second thing to know is that they spend a lot of time on YouTube. People watching videos on YouTube are engaged, sometimes watching one video, sometimes staying for an hour or more watching many videos.

Third, they are receptive to messages. YouTube works hard to provide a great viewing experience while finding ways to provide advertising options to marketers that aren't overly intrusive. People vote with their eyeballs and attention, and poorly targeted ads or disruptive ad formats turn people off. YouTube knows that the ads must be a complementary experience to watching videos, or they risk losing audience.

YouTube is often the last channel marketers tackle because video requires a bit more effort than just an image, some text, and a link, but the potential to reach your audience with compelling video ads and content is well worth the effort.

## YouTube is big and growing fast

YouTube is massive. With more than 1 billion users visiting the site every month and 400 hours of video content uploaded every minute, YouTube is more massive than you may at first think, especially when you consider that both those numbers are increasing. YouTube is also the second largest search engine in the world, after, of course, its big brother Google.

People watch videos on YouTube on their computers at home, their tablets during dinner, on their mobile phones, with friends on a TV screen in the living room, and even on gaming consoles. YouTube is everywhere, and it's set to be (if it isn't already) the most watched format in the United States, beating out TV for time spent viewing.

## The benefits of YouTube's big data

You may have read a lot of articles about the benefits of big data for marketers, but sometimes the term *big data* is used without it being really clear what it means. Big data can mean a few different things:

- » **Volume of data:** A massive volume of data reveals things like audience content consumption habits and confirms them with the sheer volume. Think of YouTube as a giant survey where people are voting for the content they like every day. That's a powerful tool to have access to!
- » **Velocity of data:** Velocity in big data means that enough data over a set period, often a short period, of time reveals when something is trending or emerging. For example, the Center for Disease Control (CDC) uses data from



Google's search engine to help track flu outbreaks in the United States. The YouTube equivalent would be the trending videos pages, which uses data to float to the top the videos with the most velocity of views.

» **Variety of data:** Big data can simply mean variety. If YouTube is a survey tool, it's asking millions of questions every day about everything; what people want to watch, how and where they watch it, what makes it shareable, which devices they use, and more.

YouTube is so big, it has some of the biggest big data around. It has volume, velocity, and variety of data and uses learnings from its data to deliver advantages to marketers.

YouTube's big data helps deliver cost savings to marketers; you have the choice to reach specific audiences who will convert into a click or purchase best, ultimately benefitting from cost savings as you'll only be buying the media that works best for you. It is no longer the case that any part of your marketing campaign's performance is unknown.

You'll find efficiencies in the time it takes to create and execute marketing campaigns, tools, and features that do the thinking for you, such as where media should run, how much money should be spent to give the best return, and analyses of which creative works best and why. These features and options are born from deep research based on YouTube's big data repository. YouTube develops things like advanced audience targeting methods that are so sophisticated and yet easy to action, making your marketing budget work harder and more efficiently.

You also get access to constantly evolving tools that help you uncover insights about your audience, giving you a deeper understanding than in the past. YouTube comes with incredibly sophisticated analytics tools, developed from millions of experiments and tons of feedback, to learn what you can do to deliver more results. YouTube has used its big data to create the simplest solutions for marketers to get the maximum results.

## YouTube's place in your marketing mix

Whether you're an established marketer or just starting out, it's important to regularly review all the channels available to you, decide whether they can help deliver to your goals, and choose how you'll spend your time, efforts, and budget.

Many marketers, especially small businesses and independents, may start with digital channels like Facebook and Instagram. These channels provide easy, self-serve solutions to get started and typically require only simple creative, such as an image, text, and link. This simplicity is great, but sometimes YouTube is left until

last to be explored and exploited by marketers, primarily because creating video takes a bit more work. As evidenced by the fact that Facebook, Instagram, and other social media channels are increasingly turning to video as part of their offering, it's rapidly becoming clear that video is a required component of any marketer's plan. Given that video is becoming an essential in all marketing plans and YouTube is the most powerful video platform available, YouTube needs to be a part of your mix.

Sure, you have to make a lot of choices. You need to make decisions about your media spending and production budget, work through your resources, and decide what video you can make. Fortunately, throughout this book, I break out everything you need to consider into easy-to-manage steps so that you can easily make YouTube a part of your marketing mix.

## Using YouTube in Marketing

As a marketer, YouTube gives you choices. You can use YouTube to create more leads, let people know about your brand, solve your customer service inquiries, and more. The opportunities are endless.

### Advertising versus content marketing

YouTube offers both an *advertising platform*, a place to run ads in paid media, and a *content platform*, a place to post your video content for people to discover and watch.

Think of *advertising* as a classic ad served up when you're watching another video; it may be a short ad, running in paid media, that tells you about a product or service and encourages you to buy or act. You may like the ad; you may not. Part 2 details everything you'll need to know about advertising on YouTube.

Think of *content* as something you may choose to watch, such as a recipe video or a comedy skit. You're probably watching the video because you want to, not because a marketer paid to make you watch it. Part 3 covers content strategy development.

The best way to maximize YouTube as a marketing channel is to tackle both advertising and content. You can simply run ads, or you can make great content, or you can do both. If you do both, they can work in tandem and deliver a marketing channel essentially unlike any other.

With the proliferation of digital channels and the increasing demands from consumers for smart, compelling, targeted ads, the best marketing messages manifest increasingly as formats and creative that feel more like content than ads. Essentially, great ads are more like content. The best advertisers make ads that are so good they don't feel like an ad,; they feel like content, and people choose to watch them

To keep things simple, I break down how to run advertising on YouTube in Part 2 and how to make content for YouTube in Part 3. I treat these topics as two separate things altogether. Just know that the best marketers make ads that are as good as content.

## Picking a lane

You may think the first step in getting started on YouTube is setting up a YouTube channel, but planning how you want to use YouTube can save you time, money, and effort, and should be your first task.

Before you get started, you need to pick a lane. Are you



TIP

» **An advertiser:** The simplest lane a marketer can choose is to be an advertiser on YouTube, meaning that you make ads that run in paid media on YouTube. Advertising is a great place to start, especially if you're a marketer with existing video ad creative who wants to test how YouTube can work for you.

Choose this approach if you have some video ads you'd like to run on YouTube or, want to create some video ads to test. (Refer to Chapter 7 to get your campaign started.)

» **A sponsor:** If you're an advanced marketer who wants to run your ads against specific content, then choose this lane. Some marketers want their ads to be appear in specific placements — for example, only against sports video content or premium content from the top YouTubers. You're still running ads, but you're more selective with your placements because association is important to you. (See Chapter 7 to find out about the extensive placement options available to you.)

» **A content creator:** An even more advanced lane to choose is to be a content creator. As a content creator, you make and run your ads, but you also create content for your YouTube channel. Creating video content takes more time and budget and is often used by marketers to deliver a fuller YouTube strategy. Using YouTube to run ads and deliver content is a sophisticated strategy. (Chapter 8 covers different video content formats. Chapter 9 breaks out how to develop a content strategy.)

» **A publisher:** The most advanced lane to choose is to be a publisher. Think of Red Bull, GoPro, and any brand that has turned content creation into the core strategy of their marketing initiatives. Content has become the focus of almost everything they do in marketing. These marketers have mastered the art of great content, leveraging many of the content fundamentals described in Chapter 10.

## The Secret Formula for YouTube Success

When using YouTube as a marketing channel, you can do certain things that will help increase your video's chances of success. A handful of key components to the secret formula include

- » Creating a brief to reach the right people
- » Harnessing the power of video ads
- » Developing your content strategy
- » Making great videos
- » Mastering YouTube management
- » Measuring success

### Creating a brief to reach the right people

Don't even think about making an ad or a video until you've written a brief. A *brief* is a guiding document that marketers use to collect all the necessary information to create a successful ad or piece of content.

In the brief, you answer questions about what you want to achieve, how you'd like to go about executing your marketing program, and who you want to target — which is perhaps the most important part of a brief. As you create your brief, you'll uncover deep insights about your target audience to inform your marketing. (Chapters 2 and 3 cover everything you need to know about creating a brief.)

When you know who you want to reach and what you want to communicate to them, you'll be able to use the targeting options YouTube makes available to speak to exactly the people you want to reach. You won't have to waste your media spend reaching people you don't want to talk to.

After your campaign or first video is live, something magical happens: Every day you'll be able to learn something new about your audience by looking at the rich analytics available and you'll be able to talk to the people watching your ads and videos, hearing directly from them. (For more on how to use analytics, see Part 6) This information helps you make choices that make your work on YouTube and all your marketing efforts better every day. You can use the gems you uncover in your reports to develop new briefs for your marketing campaigns and content strategies.

## **Harnessing the power of video ads**

It's a competitive time for marketers. With the proliferation of digital channels, the bar has been raised for the quality of ads and content, and because there's so much noise, you need to work harder than ever to stand out. Marketers have many opportunities throughout the course of an average day to reach their audience, but it takes quality work to truly stand out in a sea of messages bombarding people every day.

Decent ads aren't good enough anymore; they have to be great ads. Marketers must work hard to deliver a compelling ad that catches your attention, stands out, has a clear message, and makes some kind of connection with the viewer so that they'll think or feel or do something afterwards. The good news is that video is the best medium to make truly great ads with. Sure, video takes a bit more work than a static image and some text, but if a picture is worth a thousand words, then video must be virtually priceless.

The Google Ads solution, described in Chapter 7, is possibly the most powerful advertising platform on the planet and is your gateway to uncovering what works best in your video ads.

## **Developing your content strategy**

Just like ads, there's a lot of competition for content viewership. Think of all the moments during the day where you reach for your phone to read the news, watch a video, check a social channel, post a photo, comment on something, or message a friend. Hundreds of content moments occur throughout the course of a day, and people have become experts at sifting the wheat from the chaff. Their thumbs and eyes work in perfect partnership to mercilessly scroll past hundreds of pieces of content, slowing to dwell on only the best. The writing of headlines has become an expert skill close to a form of art, designed to catch your eye and maximize the chances of a click and more time spent.

Time spent is the currency of attention, the very thing marketers are trading in. Chapter 9 can help you develop a content strategy that makes sense for your organization.

## Making great videos

It's no surprise that making video is crucially important to success with YouTube! Chapter 11 details how you can get started making videos, avoid pitfalls, and produce something that delivers. Making videos has never been easier as most people have the necessary equipment right in their pockets. Today's smartphones have such capable cameras that you can make movies with them.

If you're not familiar with creating video, head to Chapter 12, which gives you options for how you can get help from others to create content for your channel.

## Mastering YouTube management

Marketers are handling more channels than ever, with the added challenge that digital channels are giving daily feedback, while constantly changing and evolving. Magazines are, for the most part, the same as they've always been, with the basic rules of how print marketing works remaining the same for decades. The only way to succeed with digital channels, especially the most powerful and advanced digital channels like YouTube, is to actively manage them. That process requires understanding them, experimenting with them, and regularly reevaluating and maximizing your usage of all the tools they offer.

I've seen clients, time and again, who think that a small burst of effort to kick-start their YouTube channel will be sufficient. They then move on to other projects, revisiting YouTube a year later. Succeeding on YouTube just doesn't work like that. (What does?)

An even worse crime is a common misconception by even the biggest clients that a good strategy for YouTube is to use it as a repository for their TV ads. Sure, you can post your TV ads to YouTube, but it won't do a lot without a media spend behind them. Even then, creative made for YouTube will always perform better than creative made for TV.

These misconceptions about YouTube mean that many marketers leave a ton of opportunity to effectively reach their audience on the table. Don't neglect YouTube and let it become a wasteland. If you have the time, you can be doing something every day to make your YouTube efforts even better than the previous day. Chapter 15 walks through the key considerations for active channel and community management.