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Thoughts from Work / Seeing Tomorrow Too Soon: My Early Bet on Vertical Video

#ProductInsights #Advertising #VerticalVideo #Snapchat #Tiktok
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I remember the skepticism vividly. In the mid-2010s—around 2014, 2015, and even into 2016—conventional wisdom was that if you were serious about video, you had to film horizontally.

Save civilization: Stop vertical video



By: Robb Westaby

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No hotlinking please.

THE WEB — You look at your smartphone top to bottom. You operate apps on your smartphone top to bottom. So, it's understandable to hold your phone vertically to record video.

Stop it!

AD

Ad close

"Vertical video syndrome" was practically a meme, something to be mocked on social media. Holding a smartphone upright was considered amateurish, unprofessional, and unfit for the big screen. Yet, something in my gut told me otherwise. I could see the signs that mobile consumption would dominate. After all, people naturally hold their phones vertically. That simple observation sparked a realization: *Vertical video was the future.*

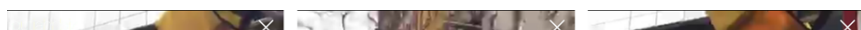
A Pivotal Event on St. Mark's Place

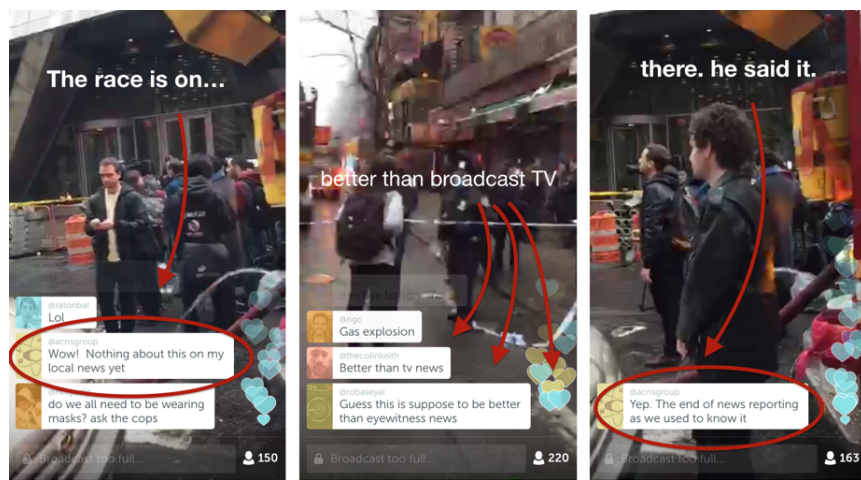
On March 29, 2015, a gas explosion rocked the East Village in New York City.



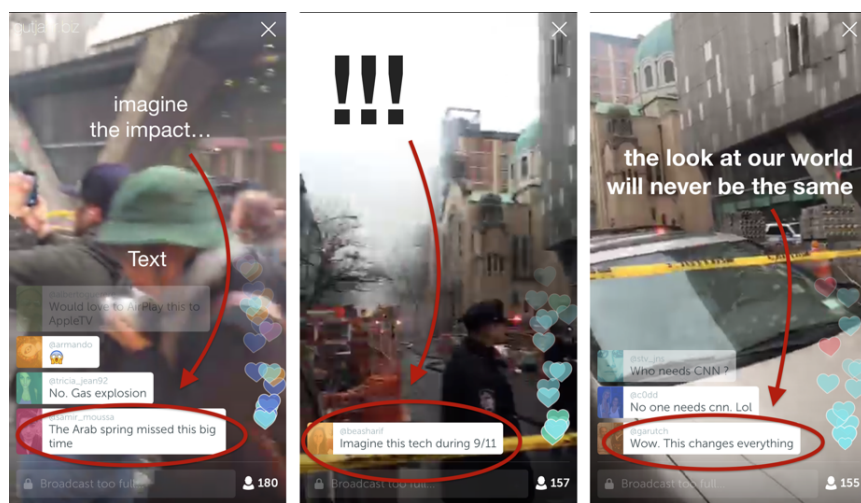
A best news photo still I considered was still taken in the horizontal/pano format

Multiple buildings caught fire, and it was chaos on St. Mark's Place. In the old paradigm, we would rely on local news cameras or broadcast networks to deliver grainy footage after the fact. But this time, everyday people were right there, capturing the fire and its aftermath in real time. They were using live-streaming apps like Meerkat and Periscope on their smartphones, broadcasting the incident vertically to an audience of thousands.

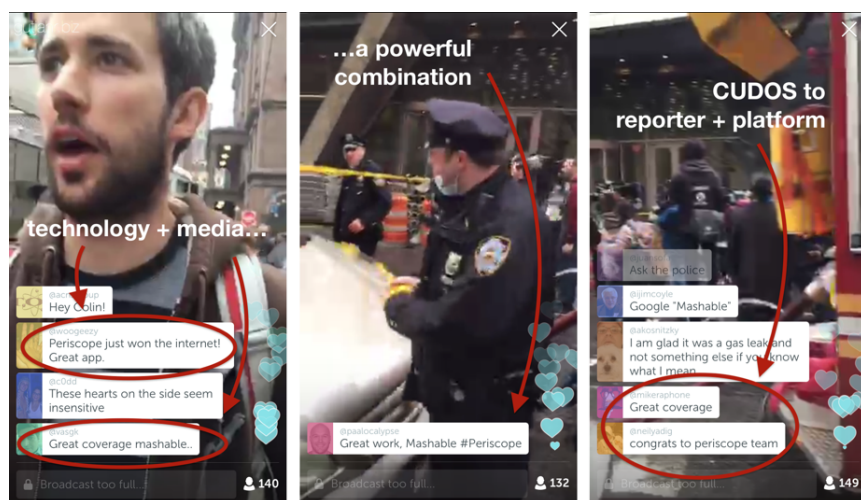




Suddenly, the broadcast lens didn't belong exclusively to major media outlets. **It belonged to everyone.**



That moment was a personal turning point. While mainstream discussions still centered on the “right” aspect ratio for online video, the explosion coverage demonstrated how immediate, compelling, and intuitive vertical footage could be, especially in a live context.



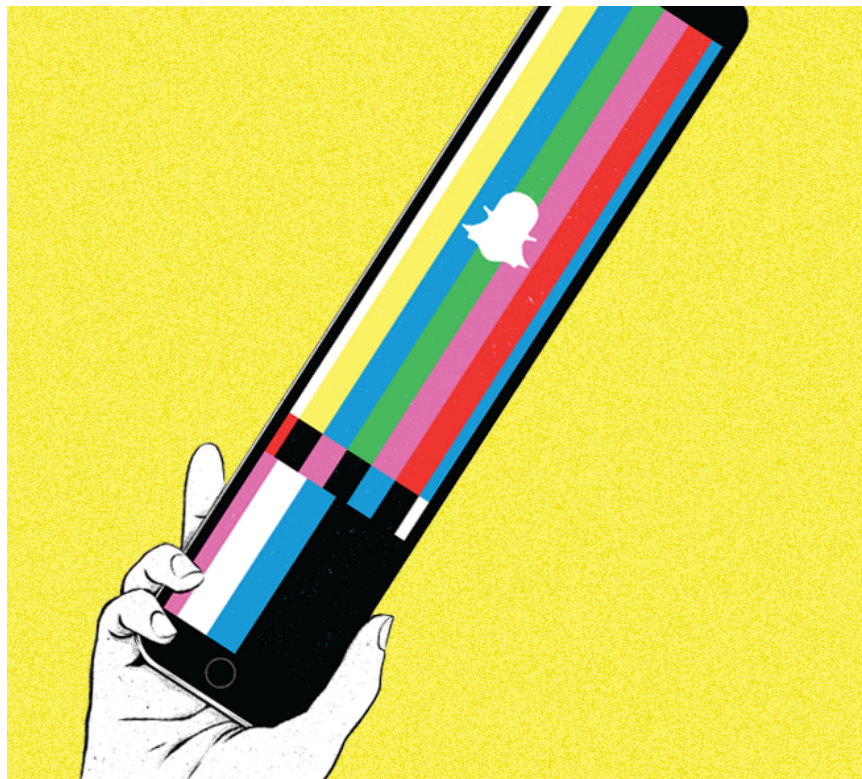
You held up your phone, and you saw the world exactly as the person streaming it did. This was far more than just a casual trend; it was a fundamentally new way of disseminating information, one that married our natural smartphone usage with real-time content creation.

A Missed Opportunity in Advertising

Despite this watershed moment, the broader advertising industry in 2016 lagged behind. At the time, I was working in the ads industry, and the company I was with still concentrated its efforts on traditional publisher networks. Advertisers were paying big money for banner placements and sponsored articles, while “video” typically referred to a handful of pre-roll ads or embedded commercials in horizontally shot clips. The demand for vertical video formats was almost non-existent in mainstream marketing discussions, and many agencies simply weren’t prepared to shift budgets from their tried-and-true methods to something so untested.

Snapchat’s First-Mover Edge

Then along came Snapchat. In 2016, the platform rolled out its vertical ads program, placing short, vertical video commercials between users’ Stories. Snapchat’s audience skewed extremely young—mostly teenagers using the app to send ephemeral Snaps to their friends. Even so, I was convinced that the format itself would be revolutionary. The ecosystem might have been niche in terms of user demographics at that moment, but the vertical ad structure felt like a glimpse into the future. It offered an immersive, full-screen experience that aligned perfectly with how smartphones were held.



So, when Snapchat went public in 2017, I wasted no time. I bought into its IPO because I believed vertical videos—both in content and ads—had nowhere to go but up. And, fundamentally, I was right about the format. Unfortunately, I picked the wrong launchpad. Snapchat’s young user base was still a risk, and the social media landscape was shifting in ways many of us couldn’t have anticipated.

The Wrong Bet

By 2018, my Snapchat stock had lost around 70% of its value. While that hurt, the real heartbreak was watching how vertical video started to explode—but not on the platform I had backed. Something quietly transformative had been happening in China. ByteDance, the parent company of TikTok (known as Douyin in China), acquired Musical.ly in November 2017. By August 2018, they had rebranded it into TikTok for international audiences. The rest, as they say, is history.

What TikTok did was turn into a perfect combination of vertical content, powerful

what TikTok did was tap into a perfect combination of vertical content, powerful recommendation algorithms, and an easy-to-use interface for short, punchy videos. Their success validated everything I believed about vertical video. But they succeeded in ways that Snapchat couldn't replicate, largely because TikTok courted a broader global audience and introduced engaging features like music syncing, editing tools, and a feed that quickly surfaces viral content—even if you're not friends with the creator.

Lessons Learned

As someone who tried to see the future in vertical video back when people were still making jokes about it online, I learned a few invaluable lessons:

1. Timing Is Critical

A great idea can arrive before its market is ready. In 2015 and 2016, the world was still catching up to the notion of vertical content, so the overall ecosystem for wide-scale adoption didn't exist yet. Even if the concept was sound, the infrastructure and user habits weren't quite there.

1. Choose the Right Platform

Betting on a format is one thing; betting on the platform that will steward that format into the mainstream is another. Snapchat had early momentum but was largely confined to a younger demographic. TikTok, with its robust features and global approach, was able to evangelize vertical video to a much broader swath of users.

A hidden timeline:

2016 Snapchat support Vertical Video Format

□ 2017 Mar: Snapchat went to IPO

□ 2017 Nov: China's Douyin Acquired [Musical.ly](#)

□ 2018 Aug: [Musical.ly](#) got rebranded as TikTok

Snapchat was also deviated their strategy pursued on hardware, de-prioritized vertical video discovery page in their App while TikTok was massively gain market share not just in US but globally still till today.

1. Never Underestimate Rapid Innovation

China's fast-moving tech ecosystem became a Petri dish for vertical video experimentation. By the time TikTok arrived in the U.S. market, it had already refined the model abroad. This cross-pollination of ideas and user adoption happened faster than many investors, including myself, had predicted.

A good bet is put not too early nor too late but on the right moment at the right place.

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