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■ THE PLAYBOOK · 06 · YOUTUBE

How to Run a YouTube *Audit*

Packaging, Retention, Discovery and Returning Viewers

YouTube gives you enough data to diagnose the funnel from impression to click to watch to return. The trick is not drowning in it, and knowing which numbers changed meaning this year.

2027 EDITION CHECKED AGAINST OFFICIAL GUIDANCE · OCTOBER 2026

@ACThePlug

ASHLEY "AC" TRYBULA

YouTube is one of my favorite platforms to audit because the data can tell a fairly coherent story if you read it in the right order: **Were we shown? Did people click? Did the video deliver? Did they come back?**

That is why I separate the audit into four layers: packaging, retention, discovery and audience loyalty. YouTube itself connects thumbnail impressions to views and watch time, provides key-moment retention reports, and segments audiences into new, casual, regular and returning viewers [1][2][3].

If you only look at total views, you are skipping most of the diagnosis. That is truer now than it was a year ago, because YouTube changed what a view is.

■ AC'S AUDIT RULE

Audit YouTube as a funnel: **impression → click → watch → next video → return**.

BEFORE YOU START RECENT SHIFTS TO ACCOUNT FOR

- Beginning August 24, 2026, YouTube counts a view the moment a video starts to play across Shorts, long-form and live, while YPP earnings stay tied to engaged views and engaged watch hours [8].
- Test & Compare now covers titles as well as thumbnails: up to three titles, thumbnails or title-and-thumbnail combinations per video, with the winner chosen by watch time [4][7].
- On July 15, 2025, YouTube renamed its "repetitious content" monetization policy to "inauthentic content" and clarified that it covers repetitive or mass-produced videos [9].
- Shorts can now run up to three minutes, but a Short over one minute with an active Content ID claim is blocked globally until the claim is resolved [12].
- YouTube began gradually deprecating the Inspiration tab in August 2026 and points creators to Ask Studio, an AI chat tool inside YouTube Studio, for brainstorming and analytics questions [15][16].
- The living room is now a primary screen: TV passed mobile as the top device for YouTube watch time in the U.S., and viewers watched more than 700 million hours of podcasts on living room devices in October 2025 [18][17].

SECTION 01

Audit the channel destination

Before Analytics, inspect the channel page: banner, profile image, About copy, featured video/trailer, homepage sections, playlists, recent uploads, Shorts vs. long-form mix and visual consistency.

If one video reaches a new person, does the channel make it easy to understand what else to watch? A strong channel page **reduces the next decision**. Decoration comes second.

Check the page on a TV as well as a phone. YouTube recommends a 2560 x 1440 banner specifically for TV, and keeps text and logos inside a 1235 x 338 safe area so they survive every crop [20]. A tagline that lives outside that box is a tagline most visitors never see.

SECTION 02

Packaging audit: impressions, title and thumbnail

YouTube reports thumbnail impressions, click-through rate, views from impressions and watch time from impressions [1]. An impression only counts when more than half the thumbnail is on screen for over a second [1]. This lets you separate “YouTube did not show it” from “people saw it and did not click” from “people clicked but did not stay.”

For every long-form video, audit title + thumbnail as one promise. Do they create curiosity without lying? Do they clearly identify the topic? Is the visual legible on mobile and from a couch? Does the title add information instead of repeating text already on the thumbnail?

Test & Compare now tests titles too. You can run up to three titles, three thumbnails or three title-and-thumbnail pairs, and YouTube serves the option with the highest watch time to everyone once the test ends [4]. YouTube says the thumbnail version had been used more than 15 million times since 2023 before titles were added [7]. I love the watch-time rule. A thumbnail that earns the click but sends the wrong expectation is not actually winning.

Check: Test & Compare runs only in YouTube Studio on a computer, needs advanced features enabled, and excludes Shorts, scheduled lives, Premieres, made-for-kids and private videos [4]. Results come back as Winner, Performed Same or Inconclusive, and the test should finish within two weeks [4]. Log every result, including the ties. “Performed Same” is useful evidence that the variable you changed was not the one holding the video back.

SENIOR STRATEGIST NOTE

Test one variable per round. If you swap title and thumbnail together and win, you have a better video and no idea why. Run title-only tests on your search-led uploads (where the words carry the click) and thumbnail-only tests on Browse-led uploads, then write the winning patterns into the packaging guide so the next editor starts from evidence.

SECTION 03

Retention audit: did the video deliver on the promise?

YouTube's retention report highlights intros, top moments, spikes and dips. The intro metric is the share of viewers still watching after the first 30 seconds, and YouTube notes that a strong result can mean the opening matched the expectation created by the thumbnail and title [2]. The highlights appear only on videos of at least 60 seconds with 100 or more views, and take one to two days to process [2].

Audit top vs. bottom performers of similar length. Where are the biggest early drops? Do long branded intros cause exits? Is context taking too long? Are the best moments buried at minute eight?

Spikes deserve interpretation. Rewatching can mean "that was great" or "wait, what did they say?" Dips can indicate boredom, confusion, a sponsor break, a tangent or the audience getting the answer and leaving. Watch the actual video at the data point. Numbers without editorial context are just colorful lines.

SECTION 04

Discovery audit: how are people finding the videos?

Review traffic sources: Browse, Suggested, YouTube Search, playlists, external and other sources. YouTube suggests finding "ideas for new content in the search terms viewers are using to find you" [5].

A search-led tutorial and a Browse-led entertainment video may need different packaging and may age differently. Do not compare them as if they were trying to win the same race.

For search traffic, inspect the actual queries. Are people finding the video for the topic you intended? Are unexpected queries revealing a new content opportunity?

Note two newer reach levers: collaborations, which add up to 10 creators to a video with revenue staying on the posting channel [14], and automatic dubbing, which offers about 20 languages for English originals [21]. Check whether either changed traffic or geography before crediting the packaging.

SECTION 05

Audience audit: new, casual, regular and returning

YouTube's Audience tab breaks monthly audience into new, casual and regular viewers, and also tracks returning viewers [3]. YouTube defines regular viewers as people "watching your channel consistently for a long time" [3]. That is one of the most useful loyalty views available on any major platform.

A channel can be excellent at discovery and weak at habit. If new viewers are strong but regular viewers are flat, ask whether there is a clear reason to return: recurring series, recognizable host, consistent topic promise, publishing rhythm, playlists or follow-up videos.

Conversely, a loyal core with weak new-viewer growth may need stronger packaging, new entry-point topics or better discovery strategy.

Watch the measurement break. From August 24, 2026, views count the moment a video starts to play across all formats, while YPP earnings remain based on engaged views and engaged watch hours, and eligibility on qualified views [8]. Any view-based trend line that crosses that date is comparing two definitions.

SENIOR STRATEGIST NOTE

Put a dated annotation at August 24, 2026 on every dashboard and client report. For year-over-year reads, lean on watch time, returning viewers and subscribers gained, which the counting change did not redefine. If a stakeholder celebrates a view jump in September 2026, ask what happened to watch time per impression first.

SECTION 06

Audit Shorts as its own funnel

Shorts are now up to three minutes long, and any square or vertical upload of three minutes or less on a standard channel since October 15, 2024 is classified as a Short [12]. A 16:9 upload stays long-form [12]. Audit the Shorts library separately: different swipe behavior, different packaging rules, different job.

Ask: What is each Short for? Discovery for a series, a cut-down of a long-form top moment, or a standalone format? A Short that does not point anywhere is a dead end with a fast frame rate.

Check: Any Short over one minute with an active Content ID claim of any type is blocked globally: it cannot be played, recommended or monetized until the claim is resolved [12]. Audit licensed music and clips in every 1–3 minute Short. Shorts under one minute are not subject to the block [12].

Check: Custom Shorts thumbnails (9:16, 2160 x 3840 recommended) can be added only in YouTube Studio on a computer, and the account must be verified [19]. If the team uploads Shorts from a phone, the thumbnail step is probably being skipped.

If Shorts bring in new viewers who never watch long-form, the bridge is missing: related-video links, matching series names, or a long-form payoff the Short teases.

SECTION 07

Audit for the living room: TV and podcasts

YouTube reported that TV passed mobile as the primary device for YouTube viewing in the U.S. by watch time, with viewers watching more than 1 billion hours of YouTube on TVs daily [18]. Podcasts drive much of that: more than 700 million hours watched on living room devices in October 2025, up from 400 million a year earlier, and YouTube counts 1 billion monthly active podcast viewers [17].

That changes the audit. Thumbnails are read from across a room, and text that works on a phone can be unreadable on a TV grid.

Check: Pull device type for the last 90 days and split the top 20 videos by TV share. Compare average view duration on TV vs. mobile for the same videos. If a format over-indexes on TV, it may deserve longer runtimes, chapters and a podcast-style playlist.

For podcasts: Is the show organized as a playlist with a consistent title format and episode art? Do episode titles name the guest or topic in the first few words? Is there a clip strategy that sends Shorts viewers into full episodes?

SECTION 08

Compare like with like using Advanced Mode

Advanced Mode lets you compare videos, groups, periods and metrics, and build groups of up to 500 videos, playlists or channels to read their combined performance [6]. YouTube is also gradually rolling out an updated YouTube Studio experience starting July 2026, so Analytics may look different from older screenshots and training decks [6].

Create groups for your major content pillars, hosts, formats, video lengths or editing styles. Compare retention, CTR, watch time, subscriber gain and traffic sources.

This is especially helpful when teams argue from anecdotes. “People love interviews” is a hypothesis. A group of 25 interview videos compared with 25 explainers is evidence.

Ask Studio, the AI chat tool inside Studio, can explain metrics and summarize comments in a desktop browser [16]. Use it for the first read, then confirm every number against the report before it goes into a deck.

SECTION 09

Audit the next-video system

A good YouTube strategy should not leave a viewer at a dead end. Audit end screens, cards, playlists, pinned comments, descriptions and verbal transitions to another relevant video.

If somebody finishes a video, what is the most logical next watch? If the answer is "whatever YouTube decides," we are outsourcing too much of the journey.

Include the community layer. Creators can now set up to three channel guidelines that set the tone for comments, and Studio has added comment search by topic or meaning [22]. For eligible channels with 500 to 500,000 subscribers in YPP, Hype lets viewers boost a video during its first seven days onto a country-specific weekly leaderboard [13]. Check whether the team asks for it in the first week of priority uploads.

SECTION 10

Audit AI use, originality and trust

Originality: YouTube's monetization policies now call the old "repetitious content" rule "inauthentic content," clarified on July 15, 2025 to include content that is repetitive or mass-produced, and it describes generic content as material that "looks like it's made with a template" [9]. Audit the library for templated series: same script frame, same stock visuals, different keyword. If 30 videos could be swapped without anyone noticing, that is a monetization risk.

Disclosure: Creators must disclose realistic content that is made or meaningfully altered with AI, such as making a real person appear to say something they did not, altering footage of a real event or generating a realistic scene that never happened [10]. The setting sits under "AI use" in the upload Attributes section [10]. AI help with scripts, titles, thumbnails, captions or beauty filters does not need disclosure, and YouTube says disclosure alone will not limit audience or monetization eligibility [10]. Creators who repeatedly fail to disclose risk penalties up to removal from YPP [10].

Likeness: Likeness detection, in Studio under Content detection, flags videos where a creator's face appears altered or generated by AI and routes removals through the privacy complaint process; setup requires a channel owner or manager over 18, a government ID and a selfie video [11]. For a host-led channel, enroll the host.

Dubbing: If automatic dubbing is on, set it to "Publish manually" for anything sensitive and review the transcript before release [21]. A mistranslated claim is still your claim.

■ SENIOR STRATEGIST NOTE

Write a one-page AI register for the channel: which tools touch scripts, voice, visuals and translation, who signs off, and which uploads were disclosed. Re-check it at every audit. When a brand partner or a policy review asks how a video was made, the team should answer in five minutes from a document, not from memory.

■ SECTION 11

Turn findings into packaging and programming tests

End with two kinds of actions: **packaging tests** and **programming tests**.

Packaging: new thumbnail style, shorter/clearer title pattern, title-only and thumbnail-only Test & Compare rounds, stronger first 30 seconds, TV-legible thumbnail text.

Programming: follow-ups to top moments, recurring series, new search-led topics, host tests, format/length tests, Shorts-to-long-form bridges, podcast playlists, collaborations, sequel strategy.

Optimizing one video into oblivion helps one video. The audit should improve the system that produces the next 20.

■ CREATIVE SPECS

Creative specs and brand consistency on YouTube

Whatever your brand system is, YouTube asks one thing of it: everything has to read at thumbnail size on a phone and from across a room on a TV. Fewer words, bigger type, one idea per frame. On YouTube the thumbnail, the title and the first 30 seconds do most of the brand work, because that is where a viewer decides whether your channel is worth a click and a return.

ASSET	SIZE / RATIO	SAFE ZONE	PRO TIP
Video thumbnail	16:9; 3840 x 2160 recommended, 640 px min width; JPG/PNG; up to 50 MB desktop, 2 MB mobile [19]	Keep headline and face away from the bottom-right corner where the duration stamp sits	One focal point: a claim, a number or a face. Four words max, and don't repeat the title word for word. Check it at the size it appears in Suggested and on a TV grid before publishing.
Shorts thumbnail	9:16; 2160 x 3840 recommended, 640 px min height; desktop Studio only [19]	No pixel safe zone published in YouTube Help; preview in the Shorts feed before posting	Keep text in the vertical center and large enough to read in a grid of Shorts. Use the same series label as the long-form parent so the two read as one franchise.

ASSET	SIZE / RATIO	SAFE ZONE	PRO TIP
Shorts video	Square or vertical, up to 3 minutes [12]	Keep captions and key text in the middle of the frame, clear of the right-side buttons and bottom caption area; check on device	Burn in captions and keep on-screen text to a few words per beat. Number multi-part Shorts consistently (“Part 1 of 3”) so viewers can find the rest.
Long-form video	16:9 (a 16:9 upload stays long-form) [12]	Title-safe margins inside the frame for TV overscan	Use one lower-third template for names and titles and one chapter-card style for sections. Add chapters in the description and upload or review captions instead of relying on auto-captions alone.
Channel banner	2560 x 1440 recommended for TV; 2048 x 1152 min; 6 MB max [20]	1235 x 338 safe area for text and logos [20]	Put your name or logo and one line on what the channel is for inside the safe area. Skip upload schedules you might not keep. Preview on desktop, phone and TV.
Profile picture	Displays at 98 x 98; square crop; 15 MB max [20]	Circle crop: keep the mark centered	Use a simplified mark or a clear face. A full wordmark becomes unreadable at 98 px. Match the avatar you use on other platforms so viewers recognize you across apps.
Video watermark	Square, 150 x 150 min, under 1 MB [20]	Corner overlay	Use a simple single-color mark that stays legible at small size. Keep it out of the area where your on-screen text and lower thirds sit.

Build your own system: Make a thumbnail template with a fixed grid: where the face sits, where the text sits, how much empty space you keep. Set a short type hierarchy (one bold display style for thumbnails and titles, one body style for lower thirds and chapter cards). Pick a limited palette of two or three colors plus a neutral, and check every type-and-background pairing for contrast (WCAG AA, 4.5:1 for small text). Set a minimum size for your logo and a rule for where it appears. Give each recurring series a marker, such as a consistent title format, a color band or an episode number, so returning viewers spot it in the feed.

Voice by surface: Titles lead with the claim, the number or the topic people search for. Descriptions put the specifics and links in the first two lines. The About section and channel trailer say who the channel is for and what they get. Community posts and Shorts captions can be looser and more conversational. Pinned comments and replies should sound like the host. Keep a one-page voice guide with an example for each so editors and producers write in the same voice.

Accessibility: Upload or correct captions on every video, use chapters on anything over a few minutes, keep on-screen text large and on screen long enough to read, and don’t rely on color alone to carry meaning in graphics or charts. Captions also help viewers watching on mute and viewers whose first language is not yours.

Consistency should make a series recognizable, not make every video look like a commercial. Keep the template tight on thumbnails and packaging, where recognition drives clicks, and keep it light inside the video: a branded intro longer than a few seconds is a common place for the retention curve to drop. Save launch-style treatments for real launches so they still mean something.

■ PRO TIP

Build a thumbnail contact sheet: screenshot your last 20 thumbnails as they appear in Suggested and arrange them in a grid at that size. If you can't tell which series each belongs to, or can't read the text, your template isn't doing its job. Fix the template, then run a thumbnail-only Test & Compare round on the next upload to check the change against the old style.

■ DO	■ DON'T
+ Lead the thumbnail with one claim, number or face, readable at TV distance	– Change thumbnail style every upload and expect recognition to build
+ Use one template per series so returning viewers recognize it in the feed	– Put the logo on a busy photo or shrink it below a legible size
+ Check every text-and-background pairing for contrast and preview on phone and TV	– Use launch-style badges on routine weekly uploads
+ Keep intros short and get to the promised payoff fast	– Repeat the title word-for-word on the thumbnail
+ Match series labels across Shorts, long-form and podcast episodes	– Put text outside the 1235 x 338 banner safe area

Copyable audit checklist

- ☐ **Channel destination:** Does the homepage make the next watch obvious, on a phone and on a TV?
- ☐ **Packaging:** Are title + thumbnail working as one accurate promise?
- ☐ **Impressions:** Is weak performance a distribution issue or a click issue?
- ☐ **CTR + watch time:** Are clicks turning into meaningful viewing?
- ☐ **Test & Compare:** Am I testing titles and thumbnails one variable at a time and logging every result?
- ☐ **First 30 seconds:** Does the opening match the packaging and earn continued attention?
- ☐ **Retention:** What do top moments, spikes and dips reveal?
- ☐ **Traffic sources:** Browse, Suggested, Search, playlists, external: what is driving discovery?
- ☐ **Search queries:** What exact terms are bringing viewers in?
- ☐ **Audience loyalty:** How are new, casual, regular and returning viewers changing?

- ☐ **Measurement:** Have I annotated the August 24, 2026 view-counting change and stopped comparing raw views across it?
- ☐ **Shorts:** Does every Short have a job, a bridge to long-form and a clean rights check if it runs over a minute?
- ☐ **Living room:** Which formats over-index on TV, and are podcasts organized as playlists?
- ☐ **Comparisons:** Have I grouped similar videos/hosts/formats in Advanced Mode?
- ☐ **Next watch:** Do end screens, playlists, collaborations and series design move people deeper?
- ☐ **AI and originality:** Are realistic AI edits disclosed, templated series reviewed and the host enrolled in likeness detection?
- ☐ **Creative specs & consistency:** Do thumbnails, banner, lower thirds and Shorts follow the specs and safe zones, use my own templates consistently, and carry captions and readable text?
- ☐ **Testing:** What packaging and programming hypotheses will I test next?

Audit scorecard

AUDIT AREA	WHAT I'M CHECKING	SCORE (1–5)	ACTION / EVIDENCE
Channel destination	Brand clarity, homepage sections, playlists, next watch, TV banner safe area		
Packaging	Title, thumbnail, CTR and watch-time share		
Testing log	Test & Compare rounds, one variable each, results recorded		
Retention	Intro, top moments, dips, spikes and AVD		
Discovery	Browse, Suggested, Search, playlists, external, collaborations, dubbing		
Audience loyalty	New, casual, regular and returning viewers		
Measurement	View-counting change annotated; watch time and returning viewers as trend metrics		
Shorts	Role of each Short, long-form bridge, Content ID on 1–3 minute Shorts, custom thumbnails		
Living room	TV share by format, podcast playlists, TV-legible packaging		

AUDIT AREA	WHAT I'M CHECKING	SCORE (1–5)	ACTION / EVIDENCE
Programming	Series, follow-ups, content pillars, host/format roles		
Navigation	End screens, cards, playlists and next-video logic		
Community	Channel guidelines, comment management, Hype in launch week		
AI and originality	Disclosure, inauthentic-content risk, likeness detection, dub review		
Creative specs & consistency	Specs and safe zones, series templates, contrast and captions, voice by surface		
Testing	Thumbnail and title tests, comparisons, content groups		

DECISIONS

How I'd turn this into action

Finish with a one-page decision summary: **three things to stop, three to start, three to continue and three tests to run.** Assign an owner and a date to every test. An audit without a decision is just organized hindsight.

SOURCES

Official sources and creator resources

Platform features change quickly. This Playbook was checked against official guidance available in October 2026. Verify feature availability inside your own account before treating any tool or metric as universal.

[1] YouTube Help: Check your thumbnail impressions and watch time · https://support.google.com/youtube/answer/9314486

[2] YouTube Help: Measure key moments for audience retention · https://support.google.com/youtube/answer/9314415?hl=en

[3] YouTube Help: Understand your YouTube audience · https://support.google.com/youtube/answer/9314416?hl=en

[4] YouTube Help: A/B test titles and thumbnails (Test & Compare) · https://support.google.com/youtube/answer/13861714

[5] YouTube Help: Content tab analytics tips · https://support.google.com/youtube/answer/12942217

[6] YouTube Help: Learn how to use Advanced Mode for analytics reports · https://support.google.com/youtube/answer/9717005

[7] YouTube Official Blog: YouTube Studio Updates at Made On YouTube 2025 (Sept. 16, 2025) · https://blog.youtube/news-and-events/youtube-studio-made-on-youtube-2025/

[8] YouTube Help: How engagement metrics are counted · https://support.google.com/youtube/answer/2991785?hl=en

[9] YouTube Help: YouTube channel monetization policies · https://support.google.com/youtube/answer/1311392?hl=en

[10] YouTube Help: Disclosing use of altered or synthetic content · https://support.google.com/youtube/answer/14328491

[11] YouTube Help: Likeness detection on YouTube · https://support.google.com/youtube/answer/16440338?hl=en

[12] YouTube Help: Understand three-minute YouTube Shorts · https://support.google.com/youtube/answer/15424877?hl=en

[13] YouTube Help: Hyping videos eligibility, availability & policies · https://support.google.com/youtube/answer/15509925

[14] YouTube Help: Invite collaborators to your video · https://support.google.com/youtube/answer/16554898

[15] YouTube Help: Explore Inspiration tab on YouTube · https://support.google.com/youtube/answer/15575509?hl=en

[16] YouTube Help: Learn about Ask Studio in YouTube Studio · https://support.google.com/youtube/answer/16291691?hl=en

[17] YouTube Official Blog: How podcasts took over the living room in 2025 (Dec. 18, 2025) · https://blog.youtube/news-and-events/podcasts-living-room-in-2025/

[18] Think with Google: From the YouTube CEO, Neal Mohan's big bets for 2025 · https://business.google.com/us/think/search-and-video/2025-youtube-predictions-neal-mohan/

[19] YouTube Help: Add video thumbnails on YouTube · https://support.google.com/youtube/answer/72431?hl=en

[20] YouTube Help: Manage your channel branding · https://support.google.com/youtube/answer/10456525?hl=en

[21] YouTube Help: Use automatic dubbing · https://support.google.com/youtube/answer/15569972

[22] YouTube Help: Creator updates · https://support.google.com/youtube/answer/9072033

OFFICIAL CREATOR RESOURCES TO FOLLOW: YouTube Creators · YouTube Creator Academy · YouTube Official Blog

■ ABOUT

About the author

Ashley “AC” Trybula is an award-winning content and audience executive, journalist and media leader working across media, culture, social and the creator economy. Her work spans content strategy, audience development, editorial leadership, video, original programming and digital distribution. She writes about audience growth, social media, digital culture, media leadership and the business of attention.

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