

Peach



Get control of your video asset workflow

A report by Peach and CoLab identifying seven critical issues
June 2020

Introduction

Video ad revenues are forecast to reach nearly \$64 billion in 2020. Even accounting for a downgrade to this figure in the face of severe recessionary pressures, the unerring rise of what is increasingly the digital format of choice is going to continue shaping digital media plans for years to come.

Video ads drive campaign effectiveness, prompting nearly double the increase in purchase intent than a standard banner does according to On Device Research.

However, sales opportunities are lost, products go unsold and campaigns start late because a staggering 41% of all video ads failed in a variety of ways in Q1 2020.

Digital video advertising is hampered by numerous behind-the-scenes workflow challenges that make the distribution of creative from agency to consumer a far from simple process.

These challenges — which relate to file sourcing, distribution, formatting, and stakeholder communication — are in many ways a reflection of the broader issues that the entire media industry is grappling with: time-poor agencies, declining trust in advertising and budgetary pressures are all taking their toll on video asset workflows.

This report will outline the key challenges faced by practitioners in the world of video asset workflow. It will draw on insight from qualitative and quantitative interviews with key players in the market and will offer recommendations to digital planners, client-side marketers and ad ops teams on how to navigate these challenges while bringing renewed efficiency to video asset workflow processes so that the burgeoning demand of consumers and brands can be met effectively.

Thirty-three interviews were conducted in early 2019 by the media and technology consultancy specialists CoLab Consulting. Additional qualitative data from a further seven interviews conducted by Peach in early 2020 has also been drawn upon.

COLAB
MEDIA CONSULTING



Executive summary:

7 critical issues



Seven critical issues have been identified which have a profound impact on video asset workflow. Their consequences are far reaching, with financial, legal, reputational and staff satisfaction knock-on effects widespread across the media landscape.

Critical issue

#1

Sourcing creative is far from a simple task **= Costs as campaigns are delayed**

70% of media buyers say sourcing creative is frustrating and nearly three quarters report that the resulting delays to campaign launch dates cost their business money. Systems which instantly create and distribute the correct files for online, social, TV, VoD, DSPs and ad servers will improve existing video workflows by reducing errors, speeding up asset deployment and ensuring that campaigns are activated on time.

Critical issue

#2

Communication between stakeholders is chaotic **= Slow processes**

78% of agencies send time consuming updates back and forth via email. Reducing the communication chaos will ensure that the right files are delivered first time - improving transparency among stakeholders while speeding up campaign activation and mitigating against the cost of campaign delays.

Critical issue

#3

Distribution inaccuracies delay campaigns **= Inefficient manual workarounds**

85% of agencies experience issues with getting campaigns live on time. Costs are on the rise associated with the inefficient and complex manual workarounds dealing with issues like the wrong technical data or video file. With the volume of assets increasing year-on-year, investment in video workflow automation is essential to improving distribution issues upstream.

Critical issue

#4

Video quality and formats are not given the attention they deserve **= Poor brand experience**

85% of agencies say they manually determine that correct assets have been submitted. Low quality creative reduces consumer trust in advertising. All players in the supply chain need to take responsibility for quality to ensure the sustainability of the digital video ecosystem.

Critical issue

#5

Lack of campaign tracking and measurement **= Harder to optimise campaigns**

41% of video ads were unfulfilled or failed to start in Q1 2020. Agencies have limited visibility on the causes of these technical fails yet often shoulder the burden. The knock-on effects are numerous, with agencies unable to optimise campaign performance at the individual asset level or produce quality data that can be used for critical campaign decisioning.

Critical issue

#6

Complexity introduced through poor collaboration and multiple systems **= Campaign errors and inefficiencies**

76% of all respondents log in to between two and five systems for each campaign. Not only is this time consuming, but it also makes it nearly impossible to get a consolidated view of campaign delivery, making errors that much more likely. Technology vendors who can reduce complexity by creating smoother internal workflows while easing the lines of communication are essential as the video ecosystem expands.

Critical issue

#7

Negative impact on staff retention and professional development **= Low-value work and staff churn**

Media agency staff turnover is twice the UK national average. It is widely reported that agency staff are involved in time-consuming, manual low-value work which takes the focus away from activities which add genuine value for clients. Investment in video workflow systems must be viewed through a lens of wider long term company pay back through both staff and client satisfaction.



Sourcing creative is far from a simple task

Hardly has the video asset workflow process begun before challenges are identified. The critical issue of sourcing creative has been cited as a slow and complex process with clients often unaware of the creative specs required, creative delivered late, and cross-platform incompatibility resulting in every placement being handled in a different way.

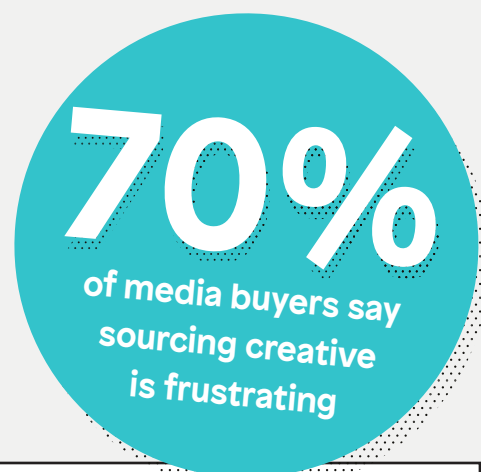
As **Anthony McGregor Clarke, Senior Integrated Producer at Oliver**, says

"I find the biggest obstacle in taking creativity within digital video to the maximum level is the inherent inefficiency between the places where the users are found and the assets that are made to reach them. A user engaging on a mobile device will respond more positively if the creative they see has been created for their device and the creative is for them. Supplying what is needed rather than what we think is needed saves time and improves effectiveness."

Joseph Harake, Digital Director at OMD, speaking specifically to the issue of competing vendor and DSP specs, suggests that nothing is interoperable so video asset management takes time and frequently goes wrong:

"For us creative specs can be a huge issue if we've got a number of different suppliers or vendors or demand side platforms that we're using, how we serve the video creative often means very big files, whether or not we're sending that piece of creative directly to a supplier."

The knock-on effect of campaign delays are inevitably related to the cost of both wasted time and wasted budget with challenges in delivering campaign effectiveness across the entire media plan – both on and offline. Time sensitive campaigns related to seasonal offers, promotions or events will feel the impact of delays even more keenly than longer term brand building pieces.



ISSUE

Sourcing creative is frustrating and can result in campaign delays

70% of media buyers say sourcing creative is frustrating

IMPLICATIONS

Media agency teams should consider working more closely with upstream partners such as the creative agency well in advance to avoid sourcing issues further down the line.

ISSUE

Inaccuracies cost time and money

For agencies KPI-ed with a 24 hour turnaround from an approved media plan, delays outside of their control are hugely frustrating

IMPLICATIONS

Systems which instantly create files in the right format for online, social, TV, VoD, DSPs and ad servers across multiple aspect ratios would transform the existing complicated and manual workflows from an efficiency point of view.

ISSUE

Sourcing creative assets is not a simple task

94% of agencies report issues in sourcing assets¹

IMPLICATIONS

Codifying the experience for the media agency teams means anyone can rely on file accuracy before they are uploaded to different ad-servers.

¹Source: CoLab Consulting Video Ad Hub Research 2019

Communication between stakeholders is chaotic

78%

of agencies email time
consuming updates
back and forth

While it may have fundamentally changed the way we do business in the 21st century, email as a channel for communicating complex technical specifications, delivering large file formats, and keeping track of the ever shifting nature of digital media plans, is far from ideal. Four fifths of interviewees claim that video ad workflow is managed by time consuming email communications, with some reporting overflowing inboxes numbering several hundred emails after just two days spent out of the office.

Email systems have no versioning history. Their usage is only as effective as the discipline of their users and they constantly fall foul of the trap that sees multiple stakeholders cc-ed with no clear workflow action being assigned to each recipient. Email security is an ongoing issue for many businesses and where accountability falls down, critical information and assets are lost and delays and inaccuracies are pervasive.

The majority of agencies have reported the use of manual processes, including email and Slack to establish that the correct campaign assets have been submitted, conversely only 15% have an audit trail system in place. Email is an inadequate audit trail tool and the risk and consequences – both in terms of time, finances and from a legal perspective – are potentially huge.

Far from getting any simpler as agencies grow accustomed to the challenges in video campaign workflows, it is likely that communication issues will only be exacerbated over the coming years. The growth in Dynamic Creative Optimisation (DCO) alongside with the natural organic growth of online video will place an even greater burden on communication systems that are not fit for purpose.

ISSUE

Email is used as the primary communications channel for campaign management
78% of agencies email time consuming updates back and forth²

IMPLICATIONS

Video asset management systems that provide full visibility across the entire workflow will be essential pieces of kit – enabling planners to know the status and location of every ad before, during and after campaigns go live.

ISSUE

Email presents a major security issue
Globally 92% of malware is delivered via email

IMPLICATIONS

Security breaches reduce trust in the client / agency relationship. As regulation from Ofcom and the EU continues to tighten its grip on the digital space, systems which minimise security risks should be a key consideration for agencies.

ISSUE

Audit trail system usage is not pervasive
15% of agencies have no audit trail system in place²

IMPLICATIONS

Audit trail systems should be baked into video asset workflow. Related cost and legal issues from lost communication trails will only be compounded by the growth of the channel.

² Source: CoLab Consulting Video Ad Hub Research 2019



Distribution inaccuracies delay campaigns



As video continues its meteoric rise as the digital ad format of choice, so do the chances of inaccurate distribution of ads to their intended target.

Common problems can include:

- Technical data being incorrect
- Files and data sent to the wrong person or destination
- Poor video quality
- File issues including the wrong aspect ratio, duration, format or client

If digital is to deliver on its promise of offering near real-time campaign planning and distribution, the speed at which agencies must get multiple executions up and running is a constant source of pressure. Although most are under increasingly stringent Service Level Agreements (SLAs), the likelihood of human error causing the wrong ad to appear in the wrong place or targeting the wrong audience are higher than you might expect in a programmatic world which – externally at least – appears to be highly automated.

The consequences of distribution inaccuracies are often severe when looked at in aggregate. The overwhelming majority of agencies interviewed reported that distribution issues cost their business money – either indirectly through time wasted or directly through the media and creative costs required to fix the problem. If supply path inefficiencies mean that a campaign takes a long time to get to air, it is invariably the media agency that shoulders the blame. One interviewee reported on the frustrations of the thousands of hours spent preparing a campaign, only for one mistake to cause the whole thing to collapse amidst diminishing levels of trust between agency and client.

The trust issues prompted by incorrect creative distribution also spill over to the consumer space, with digital audiences becoming highly frustrated with poorly targeted, low quality and irrelevant advertising – fracturing the fragile ad-funded digital ecosystem and boosting the adoption of Ad Blocking technologies. As **Bob Carley, Head of Media at ISBA** says:

“There’s a lot of change needed in order to ensure that we’re getting the right ads in the right places in the right formats. To secure consumer trust we must ensure that they are getting the messages that are supposed to be delivered to them.”

ISSUE

Inaccurate creative asset distribution causes campaign delays

*85% of agencies experience issues with campaign transmission³
88% agree that this delays campaigns³*

IMPLICATIONS

Human error is almost inevitable as the volume of video creative continues to grow. Systems which remove friction in video campaign workflows are necessary for reducing distribution inaccuracies.

ISSUE

Campaign delays incur direct and indirect costs for agencies

*73% of agencies say that distribution issues cost their company money³
Half say that delays can cause legal issues³*

IMPLICATIONS

Historically, ad tech investment has been focused on the buy-side. However, with direct costs and indirect costs on the rise, investment in end to end campaign fulfilment systems is essential.

ISSUE

Distribution inaccuracies have a negative impact on consumer trust

Consumer favourability towards advertising currently sits at 25% - half the level of the early 1990’s

IMPLICATIONS

To stop the continued erosion of consumer trust, the right creative needs to be served to the right consumer at the right time. Accuracy is of paramount importance.

85%

of agencies experience issues with campaign transmission

³ Source: CoLab Consulting Video Ad Hub Research 2019



Video quality and formats are not given the attention they deserve



As [Nielsen reports](#), ad creative accounts for nearly half of all campaign impact – exceeding reach, targeting and context in its importance. Reducing the quality of creative through file size and format issues will reduce ROI for advertisers, yet very little attention is paid to it in existing video advertising workflows.

Typically it has been observed that the supply chain is more concerned with file size, tagging and format issues, whereas media owners (who of course ultimately own the relationship with the audiences who will be exposed to ads) are influenced by the creative quality. Either way, incorrect file formats cause delays along with all of the associated direct and indirect costs, while file size issues have knock-on effects for the distribution of assets and quality control.

Joseph Harake, OMD, speaks to the challenges of the multiple creative variables that have to be considered in video asset workflows:

“I think it’s the sheer number of variables in a video ecosystem. Right from formats, the level of data that we can apply, the type of device that the user is experiencing or has exposure to - trying to manage all those different variables.”

With third-party cookies on their way out, creative quality will take on even greater importance in the future. A digital ecosystem less reliant on third party audience targeting will require high quality video creative executions that compliment context in premium environments.

ISSUE

Media owners care more about creative quality than buyers

“Quality is, overall, of a lower priority and concern than expected; the supply chain is fragmented and practitioners are more concerned with file size, tagging and format issues”

IMPLICATIONS

Low quality creative reduces consumer trust in advertising. All players in the supply chain need to take responsibility for creative quality to ensure the continued sustainability of the digital video ecosystem.

ISSUE

File sizes and incorrect formats cause campaign trafficking delays

Two thirds of respondents say resolving an incorrect submission is a manual process⁴

IMPLICATIONS

Investment in systems that automate the creation of the correct file format for every media owner, channel and platform with perfect quality (i.e. broadcast grade transcoding) will have both immediate and long term pay-off for agencies and clients.

ISSUE

Agencies have to check video assets manually

85% of agencies say they manually determine that correct assets have been submitted⁴

IMPLICATIONS

The supply chain rarely, if ever checks video assets. Removing the task of manual checking with instant quality checks will reduce rejection rates and create huge time efficiencies for agencies.

⁴ Source: CoLab Consulting Video Ad Hub Research 2019

Critical
issue
#5

Lack of campaign tracking and measurement

Campaign asset tracking in the digital space has always been operating below par – both in terms of verifying campaign delivery, but also in terms of measuring campaign effectiveness.

For advertisers the lack of consistency in measurement between digital platforms, and furthermore between online video and linear TV means that it's extremely hard to know whether you've delivered the campaign you paid for. A video view on Facebook looks different to a video view on YouTube, looks different to a video view on ITV.

Existing video workflows are complicated and propagate the risk of inaccurate campaign tagging. In a highly manual world, as already established, this will only exacerbate the measurement issue.



The measurement of campaign effectiveness on the other hand has been hampered by an over-reliance on basic behavioural metrics like clicks, likes and shares for years – metrics that tell advertisers nothing of true ROI or longer term brand impact.

Planners and ad ops professionals who are weighed down by manual video asset workflow processes have no time to focus on higher value campaign measurement and optimisation, and in so doing focus on the most basic behavioural metrics which contribute to the profound short-termism that plagues the digital marketing ecosystem at the moment.

"The biggest challenge at the moment is a lack of consistent measurement across platforms..."

– Bobi Carley, ISBA

ISSUE

Campaign tracking hampered by tagging mistakes made through largely manual workflow practices

37% of video **ads failed** in Q4 2019

IMPLICATIONS

Video asset workflow systems that reduce the chances of manual errors in the tagging process will help improve the accuracy of tagging campaigns.

ISSUE

Campaign delivery measurement is inconsistent between digital platforms and between media channels

Lack of consistent measurement across platforms is one of the biggest challenges of the moment according to ISBA

IMPLICATIONS

The industry needs a common currency for both measurement AND deployment of video campaigns. This will reduce complexity and give advertisers greater assurance about campaign delivery.

ISSUE

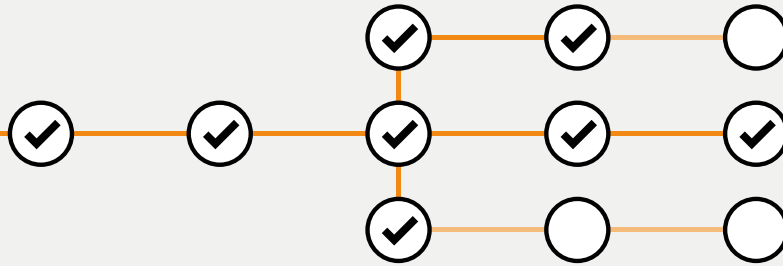
Digital campaign impact measurement focused on basic behavioural metrics that say nothing of true campaign performance

Three quarters of digital brand campaigns are being assessed only using behavioural metrics

IMPLICATIONS

Removing manual workflow processes will allow agencies to focus on higher value tasks - tasks that add genuine value to their clients.

Complexity introduced through poor collaboration and multiple systems



Video ad budgets are forecast to reach \$64 billion in 2020. Video audiences are forecast to watch a [hundred minutes of online video a day by 2021](#) as linear TV viewing continues to decline. DCO is set to take off as a mainstream digital solution of choice while 5G connectivity is set to further fuel the explosion in connected device usage. If video ad workflows are considered to be complicated now, then things are only set to get harder over the next five years.

Advertisers will move spend to where the eyeballs are and the eyeballs are moving to cord cutting options and platforms which are often extremely hard to bring together into one coherent digital media plan.

As Natalie Burton, Head of Investment Operations, PHD says:

“As video touches so many different media channels, it can be really difficult sometimes to bring all that together. That’s not helped by lots of walled gardens in the video ecosystem from a media owner perspective, with different specifications, different platforms and different ways of working. Sometimes it can be quite difficult to bring those things together, holistically.”

Complications in video ad workflows are further compounded by the sheer numbers of stakeholders to align, and the multiple ad and creative systems that planners and ad ops professionals must log in to with differing levels of interoperability.

Wayne Blodwell, Founder of The Programmatic Advisory says:

“[The challenge of] lots of different stakeholders to align... Everyone gets pretty stressed towards the launch of the campaign. So the challenge really is the process and delivery, more than anything ... [agencies] haven’t necessarily thought about efficiencies that can be made through their processes and the way that they work. So if there’s one thing I would ask them to do is to think a bit more about how they do things.”

ISSUE

Agencies have to log in to multiple systems to get video campaigns up and running

76% of all respondents log in to between 2 and 5 systems for each campaign; 15% log in to up to 10⁵

IMPLICATIONS

Agencies have to give careful consideration to investment in systems and processes that make marketing easier to control. Rationalising the number of systems present in a single workflow is key.

ISSUE

The number of stakeholders combined with the manual nature of the make delays and failure likely

87% of agencies said that a shared content library would be helpful or game changing⁵

IMPLICATIONS

A single collaborative platform like a shared content library would go a long way to harmonising stakeholder communications and accountability.

ISSUE

Negative impact on media planning

Planner vs ad ops disconnect often results in internal friction and like of alignment on campaign delivery goals

IMPLICATIONS

Technology vendors who can reduce complexity by creating smoother internal workflows while easing the lines of communication are essential as the video ecosystem expands.

⁵Source: CoLab Consulting Video Ad Hub Research 2019



Negative impact on staff retention and professional development

According to [the IPA's Annual Agency Census](#), media agency staff turnover sits at just below 28% - way in excess of the UK cross-industry average of 15%. With agencies under pressure from the digital supply chain on one side and increased client demands on the other, it is no secret that the average agency worker is increasingly time poor and stretched in their role.

Agencies report that the promise of automation in the programmatic world has in fact led to a mountain of manual processes. New graduates focus their energies on low value administrative work that are bad for morale and do nothing for their professional development. Little is being done to future proof agency talent pools.

As the world moves towards more flexible working patterns and a greater tendency to allow staff to work from home, there is more than ever a need to allow planners to focus on higher value work while removing the manual and repetitive tasks that lead to errors in incorrect submissions, tagging and transcoding - which as established have a cost in time, money and reputation.

Manual spreadsheets and email based campaign management are even less optimal in the virtual working environment, heightening the need for automated, streamlined video asset workflows.

ISSUE

Focusing agency staff on manual and repetitive tasks leads to increased chances of errors in campaign workflows

Two thirds of respondents say resolving an incorrect submission is a manual process⁶

IMPLICATIONS

As digital matures, there are lots of ways to do things better. Automating manual repetitive processes will lead to a reduction in errors – e.g. with transcoding and incorrect submissions.

ISSUE

Focusing agency staff on manual and repetitive tasks leads to low staff morale

Media agency staff turnover is twice the UK national average

IMPLICATIONS

Most media agencies are willing to pay to provide internal operational efficiencies directly impacting company performance. Investment in video workflow systems must be viewed through a lens of wider long term company pay back through staff satisfaction and development.

ISSUE

Higher value campaign reporting goes missing where the focus is on lower value administrative campaign management

Three quarters of digital brand campaigns are being assessed only using behavioural metrics

IMPLICATIONS

Media agencies see value in both improved campaign effectiveness and cost savings when it comes to implementing video asset workflow systems.

⁶ Source: CoLab Consulting Video Ad Hub Research 2019



Conclusions

While the **seven critical issues** that have been identified have a handful of process driven solutions, the fundamental implication is that technology will be the key driver in bringing efficiency and accuracy to the video asset workflow process. These issues and their implications can be summarised as follows:

Critical issue
#1

Sourcing creative is far from a simple task = Costs as campaigns are delayed

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Lack of campaign tracking and measurement = Harder to optimise campaigns

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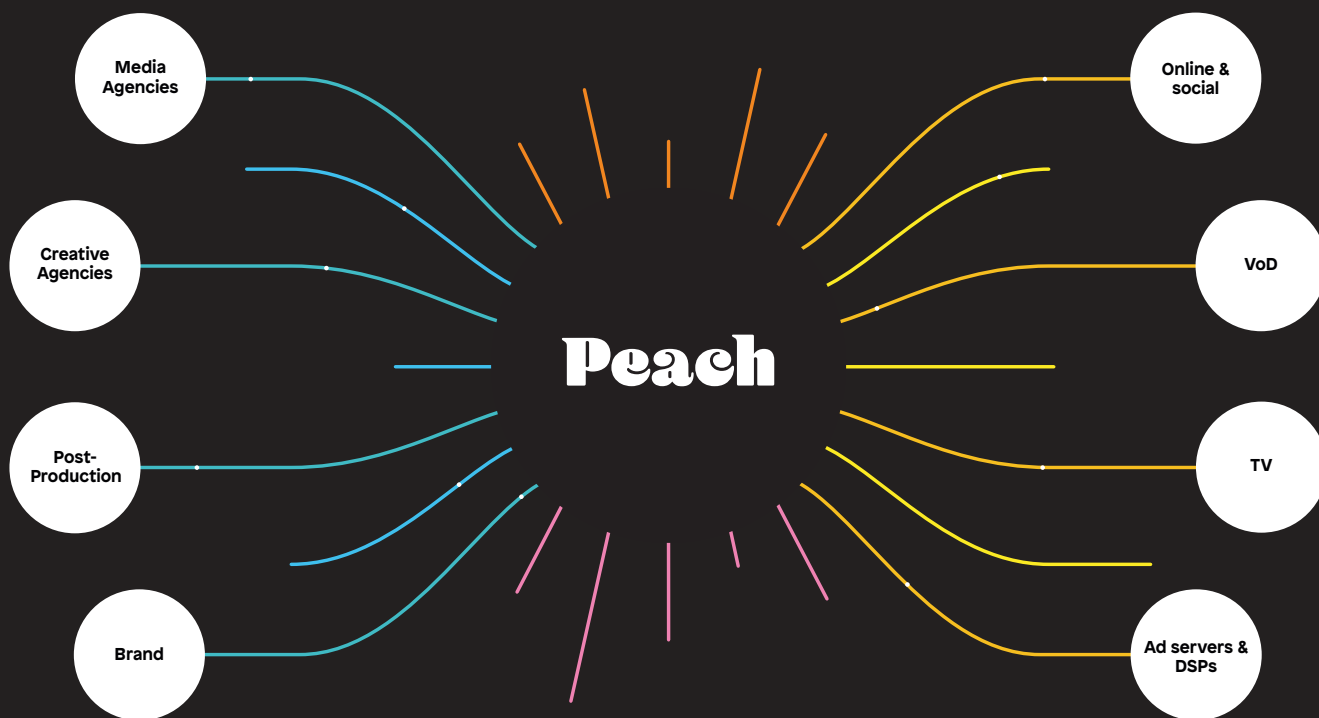
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Through both the proliferation of content and increased client demands for the most effective formats, video ad workflows are only going to become more complex in the future. The challenge of dealing with these complexities cannot not be met with increased headcount alone. Now is the time for all players in the video asset supply chain to grasp the opportunity to do things differently and set up their businesses for future success.



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"Connecting agency and production suppliers on Peach improves workflow and communication. Online asset management, fast delivery and 24/7 service means our advertising can be more agile and there is less risk to our valuable media schedule."

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Research methodology

Thirty-three interviews were conducted in early 2019 by the media and technology consultancy specialists CoLab Consulting.

The objective of the interviews was to test business assumptions and assess demand for Peach solutions within the digital advertising supply chain - in particular within the agency community, especially ad traffickers and ad operations staff, and also other relevant players, including: production, DSPs and media owners.

The agreed approach involved conducting a number of qualitative interviews with senior decision makers in these target groups and also an anonymous online quantitative survey distributed to the CoLab database, Group IMD contacts and, most successfully, by direct communication with personal CoLab Consulting contacts.

Additional qualitative data from a further seven interviews conducted by Peach in early 2020 has also been drawn upon.



CoLab is a specialist media consulting and market research business.

We provide insights and leadership at the intersection of media and technology. Our consultants are digital media veterans based around the globe who have held senior positions at major media organisations including the BBC, The Guardian and Microsoft.

We work collaboratively with our clients to deliver deep sector knowledge, an impartial view on the best way forward, and a plan rooted in practise not theory.

Find out more at colab-consulting.com



Peach radically simplifies and automates video advertising workflow connecting creative with media. Peach improves the effectiveness and efficiency of video campaigns across TV, social media and online helping advertisers reach billions of consumers in over 100 countries.

Peach is the #1 player in most major economies, working with the world's leading media owners and advertisers including Unilever, L'Oreal and Universal Pictures.

Find out more at peachvideo.com

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