

Peach



Take Control of Video Advertising

A Report On The State of Video Advertising in India

From Peach, Kantar & Aidem

March 2023

KANTAR

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Key findings

1. Brands, advertisers and agencies in India spend 60% on manual tasks when creating and delivering advertising campaigns.
2. The digital advertising market spend in India is predicted to rise by 15% CAGR from 2022 (USD 11.09 Bn) to 2024 (USD 14.69 Bn).

Background

In 2022, a recovery year post COVID-19 pandemic, global ad spend grew by 8.7%¹. Comparatively, the growth of ad spend in India has been much higher. According to Digital Advertising Report released in 2023², in 2022, the ad spend in India stood at INR 85,769 Crores (USD 11.09 Bn). It is predicted to grow by a compounded annual growth rate (CAGR) of 15% to INR 1,13,575 Crores in 2024 - making it the fastest growing market.

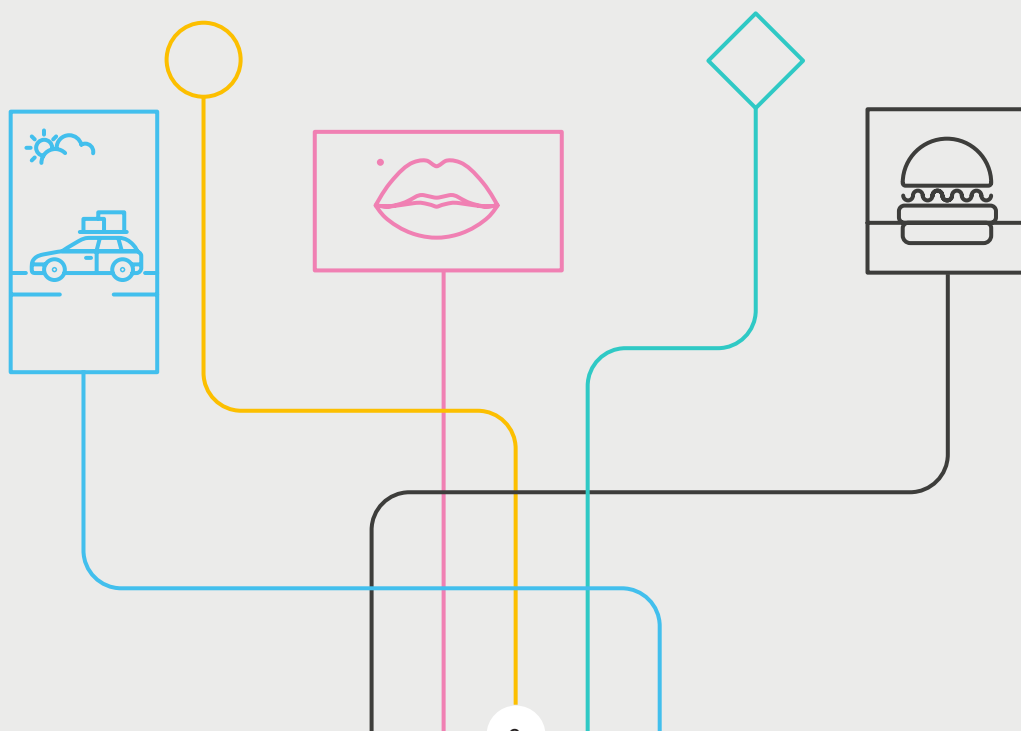
Approximately 40% of advertising spend in India is via the medium of television, with 35% focussed on digital media, while online video forms 28% of the overall digital advertising spend. In effect, spending on video as a format across digital or linear platforms amounts to nearly USD 5 Billion a year.

Video asset management spawns a flurry of activities that involves multi-stakeholder interaction to ensure that adverts are released on time, with no errors, in correct formats, and via planned avenues. While simultaneously delivering on marketing objectives, ensuring adherence to content and brand safety measures, and accommodating continued performance measurement.

Managing and ensuring a smooth workflow and automation of tasks can therefore be a challenge. This report outlines a number of challenges that are presented to agencies, advertisers, and brands in India when creating a video advertising campaign.

¹ WARC: Ad Spend Outlook 2022/2023: Impacts of the Slowdown

² Source: Digital Advertising Report 2023 by Dentsu and Exchange4Media released in February 2023





Challenges

1

Complex Workflow

The video asset exchange and management workflow is inherently complex, requiring timely and streamlined coordination among stakeholders.

3

Asset Management

As the need to publish video assets on different platforms increases, so does the need to accommodate disparate formats requiring error-free storage, content safety, and smooth dissemination.

5

Consolidated Reporting

As newer platforms are continually being introduced, it is imperative that the reporting evolves to consolidate campaign results across all platforms and present details in a cohesive manner.

2

Stakeholder Collaboration

Since there are multiple stakeholders involved in the workflow, there needs to be a balance of collaboration and control.

4

Performance Measurement

Absence of real-time or near real-time measurability, related to the performance of the video advertisement, across various dimensions leads to opacity in achieving marketing objectives.

Complex Workflow

The video asset exchange and management workflow is inherently complex, requiring timely and streamlined coordination among stakeholders.

Issue: Stakeholders consumed in manual work

Our research shows that brands, advertisers, and agencies in India spend over 60% of their time on manual video asset management tasks while creating and delivering advertising campaigns. This is a very high percentage as it exposes the whole workflow to the possibility of severe errors.

Respondents indicated a need to define the workflow in a more structured way. They cite the involvement of stakeholders and the number of platforms, channels, and publishers involved in delivering ads — and referencing the need for a streamlined and automated workflow.

For instance, video ad content meant for digital platforms is uploaded on a Demand-Side Platform (DSP). However, the video ad content for Television might have to be altered for different channels to accommodate their requirements.

Additionally, Over the Top (OTT) platforms present content to users in different ways, thus requiring content in various formats. This all leads to increased manual work for creative agencies.

Solution: A technology solution that enables stakeholders to clearly define a detailed workflow. One that involves different levels of project management and stakeholder interaction at all the levels associated with creating and delivering video ad campaigns.

Issue: Turn-around Time (TAT)

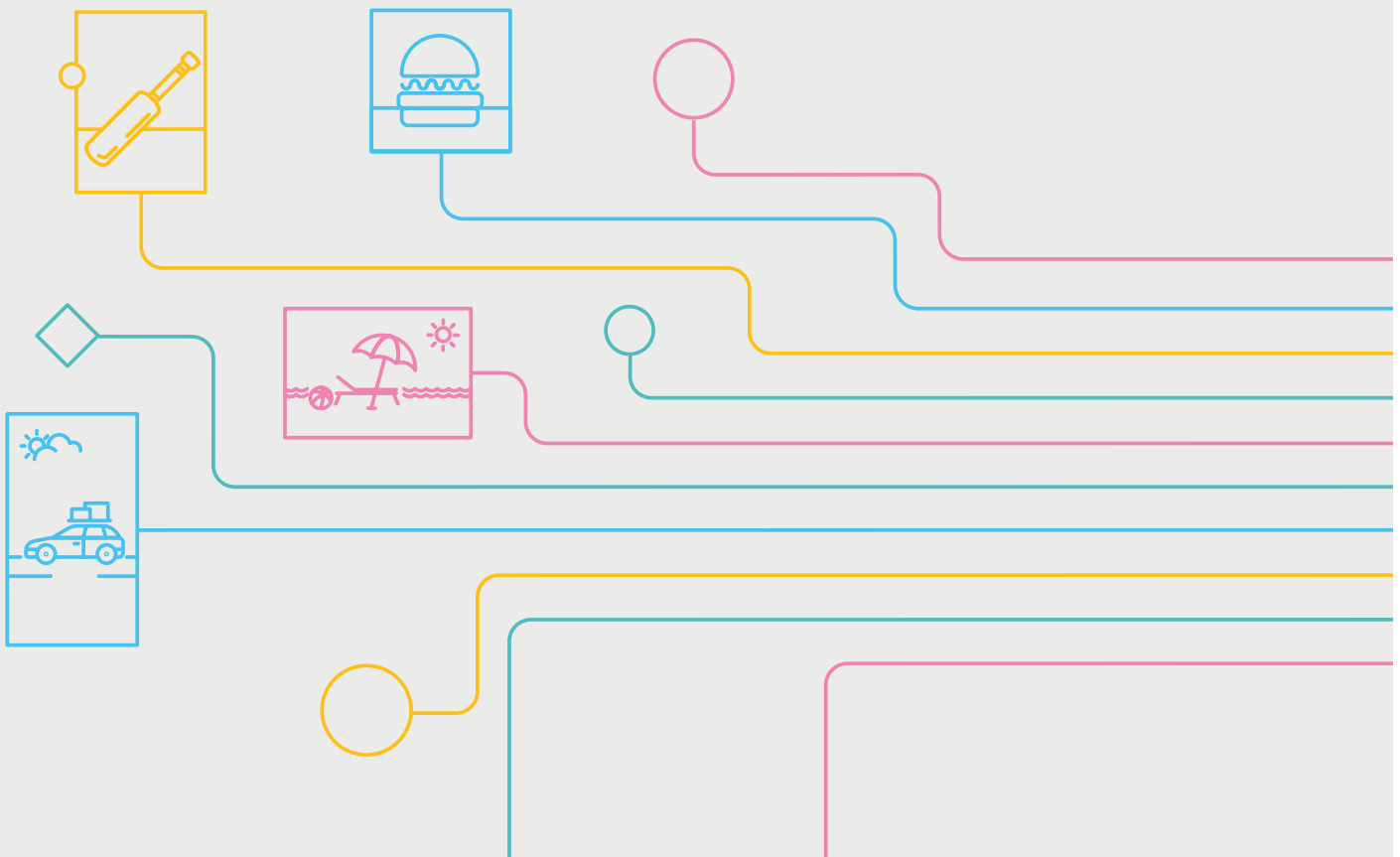
Video adverts must be delivered on time to their destinations to ensure that financial investment in the campaign is not wasted. Maintaining an efficient turnaround time for stakeholder tasks at every workflow stage is equally important.

Suppose, for any reason, a disproportionate amount of time is spent on a specific workflow stage. This might jeopardise any tasks and deadlines down the line and the overall delivery of the brand campaign — causing a negative ripple effect and a potential lag in the workflow due to the variables and expectations of specific platforms and channels.

“I would say there is definitely lag in the process at the moment ... Generally we see the TV campaigns have already launched and the delivery campaigns are still in the making. If we are asking digital agencies or the creative agencies that I need 9×16 of this particular creative or probably 5 seconds of this creative or 6 seconds of this creative, it generally takes a very long time at this moment. So that needs to cut down...”

— Mid-size agency, Mumbai

Solution: A practical approach would be to provide specific workflow timelines and set clear lead time expectations for all stakeholders. Any deviations from these specifications could indicate a delay in the eventual release of the video advertisement.



Stakeholder Collaboration

With multiple stakeholders involved in the workflow, a balance needs to be struck between collaboration and control.

The practice of video asset management varies based on the industry category, company size, technology maturity, number of stakeholders involved, and market size of the brand. Consequently, there is a need for a balance of collaboration and control in video asset management. Making content accessible in a central repository helps ensure simpler distribution leading to faster activation and transparency among stakeholders.

Issue: Transparency and stakeholder feedback across the workflow

Many of the activities in the current video advertising workflow do not integrate well. There is a pressing need to provide a holistic view of the whole process.

It is extremely important to.. *“...take a holistic view, (and)... that all of your platforms provide transparent data...”*

— **A media agency, Mumbai**

Providing a holistic view of the workflow based on contributions made by individual stakeholders increases transparency. It helps identify and plug any gaps to minimise slip-ups, but rules around access and permissions need to be carefully established. Most digital platforms claim that their interface allows for transparency, but they have their own definition of the term, which is not standardised across the market.

“...the very important step, whenever let’s say the first cut comes in, there’s feedback that’s involved from the internal as well as the external stakeholders...”

— **A Luxury brand, Delhi**

Solution: A holistic solution would reveal all the workflow activities, identify stakeholder responsibilities and show progress (including active and inactive assets) at each stage of the campaign. Features for viewing and delivering feedback on assets would improve collaboration with stakeholders.

“... there could be a common platform – then there will be no need for any permission or approval from the stakeholder. All will be aware of it that these files are being shared with so and so people so that everyone is in loop...”

— **Agency, Mumbai**

Issue: On-schedule activation

There is increased importance in the effective and efficient distribution and activation of ads in the market. As it stands, broadcasters and publisher platforms expect video assets to be delivered in correct formats as per their specified requirements.

Agencies share a broad lead time of *“48 hours to 72 hours”* for ad activation to accommodate for disparities and manage client expectations. However, this can be problematic even with a long deadline: realistically, stakeholders must work backward from the activation time to ensure complete activation, which can eat into campaign planning time and add further pressure to the supply chain.

Solution: The focus should be on enabling streamlined distribution of ads to ensure efficient and on-time activation; instead of allowing for different lead times.

Issue: Centralised and secured repository

Brands typically require access to a central repository where assets are stored using specific terminology and IDs.

Respondents identified several reasons why assets would want to be accessed:

- Easy and faster distribution of ads
- Persistence storage for logistics and future access
- Clarity and specificity for enabling cross-channel distribution

However, a centralised library of assets is only sometimes available. Stakeholders share assets in various ways, such as through email and cloud services, but knowing what the most up-to-date one is can sometimes take time and effort.

Solution: An appropriately annotated central asset repository is a must-have helping avoid back-and-forth communications, saving time and improving TAT.

“...in a central system, you just need to write a comment about the changes, and everybody can see it who has access to it. And I will get an update about the video being changed and I can just go and download. It makes the workflow process easier and regular...”

— **Brand, Mumbai**

Asset Management

As the need to publish video assets on different platforms increases, so does the need to handle disparate file formats requiring content safety checks and smooth error-free distribution.

Issue: Quality Control (QC) activities are done just before the release

All agency respondents indicated that Quality Control (QC) is the most important part of the workflow. As indicated by an agency based out of Delhi:

"...if the QC is not completed then the campaign goes into a complete hole..."
 — Agency, Delhi

While QC entails a very defined set of activities, perception towards it is often misplaced.

QC is considered as "a fail-safe" – a critical activity that acts as a catch-all for any issues before release. Activities can get backed-up since stakeholders have a tendency to push the pending activities to the QC stage and therefore delay campaign activation.

At QC stage, the content in the video asset is examined against multiple sets of compliances:

- To double check communication issues (such as pricing, discounts, offers)
- Brand and content safety
- Maintain campaign objectives – including "...sequences associated with multiple videos..."
- Checking pre or post-roll content (black screen, clocks, etc.)

Solution: QC activities should be clearly defined to address aspects with video assets. Elements of the QC process should be spread out evenly across the workflow stages to ensure efficiency – avoiding bottlenecks before release and delivery. Additionally, QC should be signposted throughout the activation process to ensure compliance at all stages is addressed.

Issue: Error-free Formats

A single video ad, generally, requires multiple versions to support formats/ratios for different media avenues. While the design for TV is mainly specific to duration, digital platforms have come to demand other forms, for example, formats for OTT platforms are different from mobile-specific video platforms. Social media platform formats also vary with short formats where the target is to ensure "thumb-stop" – content and format can undergo drastic changes.

"...I would rate the requirement for error-free format as 5/5 because as we have seen, the entire form of media is changing. People are moving. Mobile is now changing to their first screen. If we are not changing content that is adaptable to users, I think we are going to lose them..."
 — Agency, Mumbai

Solution: A provision that specifies formats/ratios for different platforms (digital or linear) with optional automated processes for converting the videos into required formats could streamline the overall workflow and ensure audiences are captured effectively on every platform.

Performance Measurement

Absence of real-time or near real-time measurability of video ad performance, across various dimensions, leads to opacity in achieving marketing objectives.

Issue: Campaign objectives

The report indicates multiple objectives that brands drive for with video ad delivery, all working towards longer-term marketing goals. Some of these objectives include:

- Establishing awareness
- Building consideration
- Increasing opportunity-to-see for specifically targeted groups

Currently, there needs to be more consideration of marketing objectives when video assets are disseminated. There must be an adequate foundation to measure and track performance, as the goals are rarely specified.

Issue: Provision for A/B Testing

Conducting A/B testing of ads is a regular practice among marketers. However, there are no avenues that allow for evaluating results of such testing and then prioritising video assets on a real-time basis.

Solution: Campaign tracking and measurement of campaign performance across platforms. Brands and agencies are still looking for a unified view of reach and frequency for their video ads. An integrated solution that accommodates video asset upload and then prioritisation based on estimated or forecasted success metrics would be an effective solution.



Consolidated Reporting

As newer platforms are continually being introduced reporting needs to evolve to consolidate campaign results and data.

Issue: Fragmented reporting

A standardised and automated reporting procedure is necessary for brands to gain a deep understanding of their performance to help make better data-driven decisions. With good metrics and insights, brands can adjust campaigns as needed.

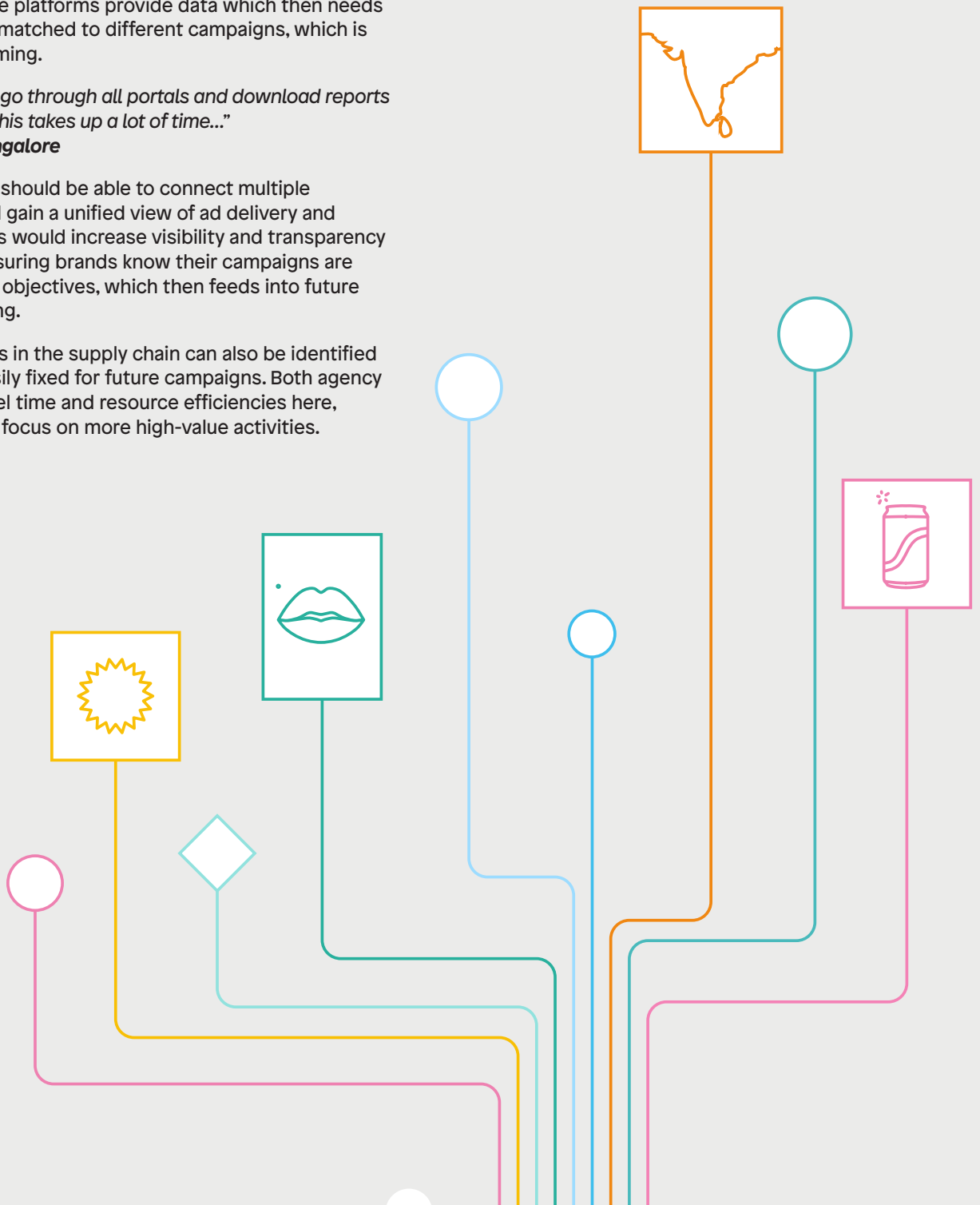
Currently, multiple platforms provide data which then needs to be separately matched to different campaigns, which is very time-consuming.

"...one has to go through all portals and download reports one by one. This takes up a lot of time..."

— **Brand, Bangalore**

Solution: Brands should be able to connect multiple data sources and gain a unified view of ad delivery and performance. This would increase visibility and transparency of campaigns ensuring brands know their campaigns are working towards objectives, which then feeds into future campaign planning.

Problematic areas in the supply chain can also be identified faster and be easily fixed for future campaigns. Both agency and brand will feel time and resource efficiencies here, allowing them to focus on more high-value activities.



Take control of your ad workflow

Peach is the global market leader in video advertising workflow and delivery. Previously known as Ebus in India, we have over 26 years of industry knowledge and are the video masters in delivering advertising campaigns to converged TV, social, digital and display.

Collaboration, distribution and automating workflow is what we do best. Our suite of products ensures quality, ease of collaboration, distribution and delivery at speed and efficiency of workflow: eliminating complexity, delays and costly mistakes associated with campaigns.

About the Research

Stakeholders	Delhi	Mumbai	Bangalore	Total
Brands	2	9	3	14
Media agency	4	5	2	11
Total	6	14	5	25

Qualitative in-depth interviews were conducted among stakeholders that lasted for 40-45 minutes. The questionnaire was designed to cover various aspects in management of video assets. The research design and the execution was done by Kantar, a leader in the market research industry.

Recruitment Criteria

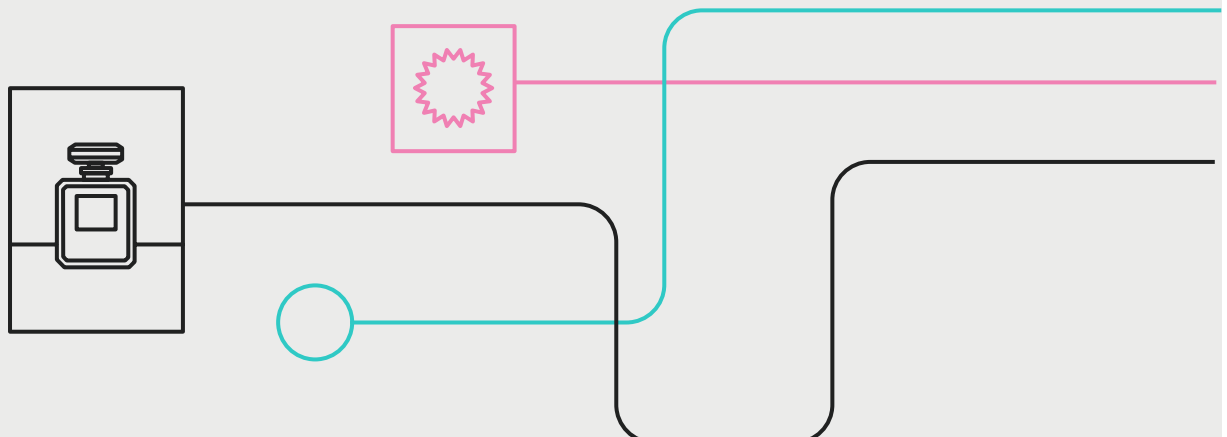
Brands

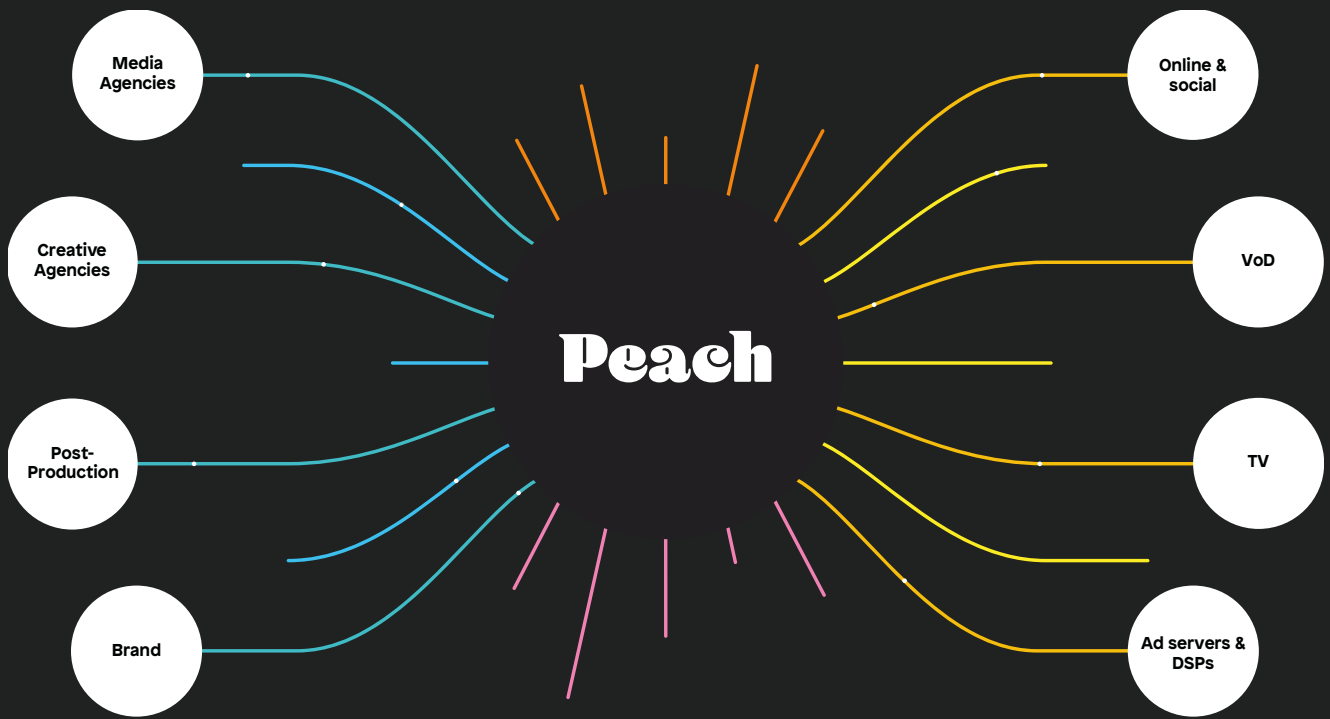
- Respondents should be part of campaign execution team
- They need to manage media agencies and/or media platforms
- Initially only Brand Group heads/Marketing heads were being targeted. Later, we shifted to relatively junior roles who are involved in execution to get relevant inputs
- Possible Designations
 - Media Planning Manager
 - Group Head- Brand
 - Marketing Head
 - Performance Marketing Manager
 - Associate Marketing Manager

Senior Manager – Media

Media Agencies

- Respondents with minimum 5-6 years of experience
- Handling client accounts directly and one of the key contacts for clients/brands
- Involved in regular and key communications
- Possible Designations
 - Associate Planning Director
 - Media Group Head
 - Account Manager – Digital
 - Senior Manager – Media
 - Director – Paid Media





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