



**HOW COMPLEXITY,
JOB SATISFACTION,
AND AUTOMATION
INTERSECT IN
DIGITAL MEDIA**



INTRODUCTION

The rapidly expanding digital advertising industry is filled with complexity and disconnection. New channels and formats, supplemental technologies, and solutions all demand new skill sets, guidelines, rules, and standards for marketers. It is becoming even more challenging to get a holistic view of the landscape. And while the marketplace has long been expanding, it has never been clearer how the resulting friction points decrease workplace efficiency, satisfaction, and professional commitment.

The national uptick in voluntary turnover, known as “the Great Resignation,” has not missed marketers. **More than one-third of advertising professionals plan to leave their current positions within the next two years.** Dissatisfied

marketers cite a lack of training across the breadth of tools and knowledge they are required to leverage, and inefficiencies where processes could and should be automated.

Both brand and agency-side professionals often need to cobble together a significant number of disparate, point solutions to effectively buy and optimize across the broad spectrum of media outlets, each with their own unique specifications and pricing methodologies. As pandemic conditions and shrinking teams are driving longer work hours and steeper climbs to campaign success, both marketers and their organizations must look for solutions that provide a greater return on marketing efforts.

Methodology

Basis Technologies collaborated with Advertiser Perceptions to conduct a study in October 2021 on the top workflow pain points that have emerged from the complexity of the advertising, point-solution marketplace, and identify opportunities to improve outcomes for marketers and their organizations by addressing those pain points. The survey panel consisted of 150 U.S.-based digital advertising decision-makers from the Advertiser Perceptions Ad Pros Community and trusted third-party partners.

50%
AGENCY

50%
MARKETER

150
RESPONDENTS

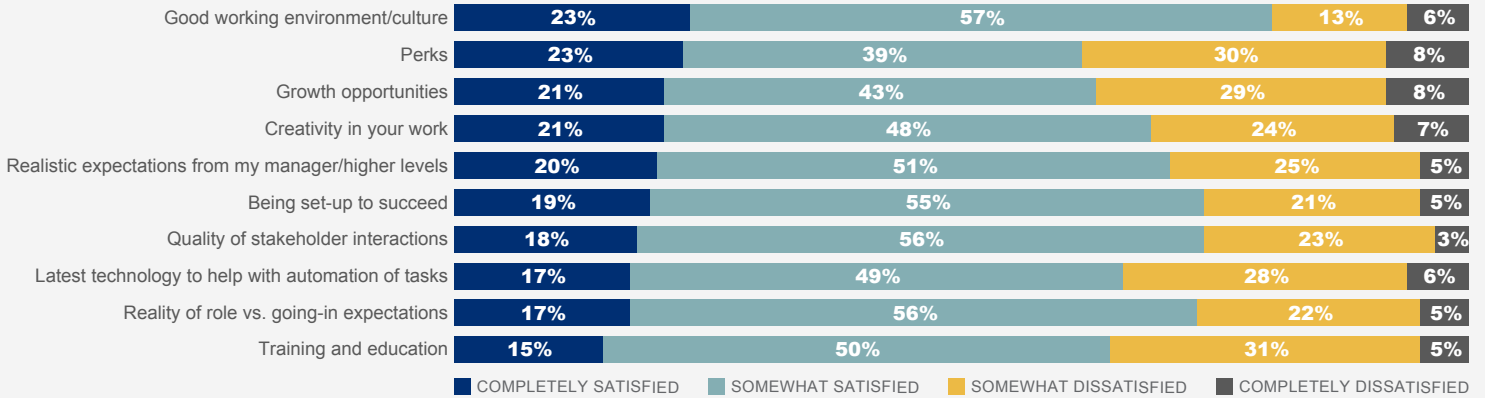

U.S

\$5M+
ANNUAL DIGITAL SPEND

THE GREAT RESIGNATION DEMANDS A STREAMLINED WORKFLOW

The expanding marketplace of advertising solutions and the lasting effects of the pandemic have intensified strains on marketing organizations. The results, among other increasingly expensive challenges, are higher labor costs and an increase in voluntary workforce turnover. Employees are reevaluating the quality and value of their work experience. Less than 1 in 4 advertising professionals are completely satisfied with any one aspect of their job. They are particularly dissatisfied with the available training and continuing education, and the lack of automation.

JOB SATISFACTION



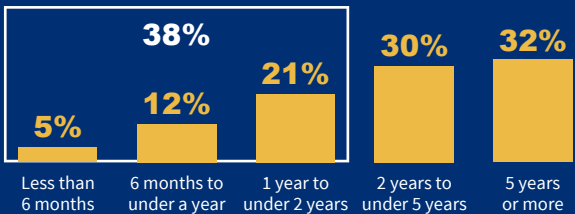
How satisfied are you with the following aspects of your job? | Base: Total Respondents (n=150)

Marketers Are Dissatisfied by Three Key Pain Points

- 1 A frustratingly complex matrix of point-solutions
- 2 A lack of high-quality role-related education
- 3 A feeling of underemployment or an inability to meet goals due to time spent on low-value tasks.

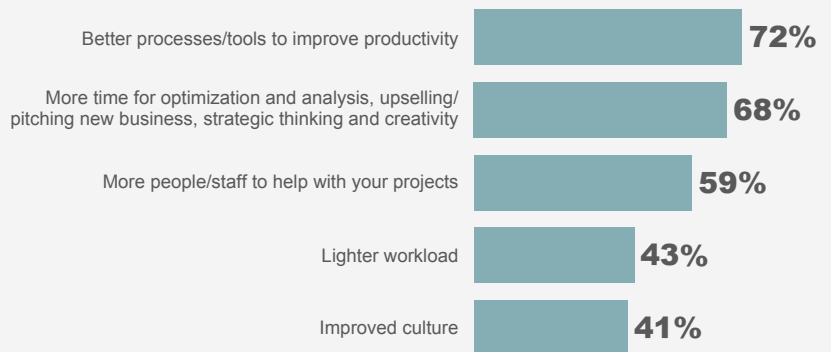
Solving for the difficulties and inefficiencies marketers identify in their workflows has the potential for exponential returns, including job satisfaction and retention. **Marketers want better processes and tools to improve productivity, and more time to focus on high-value tasks like optimization, strategic thinking, and engaging new opportunities.** A significant number of employees are willing to seek new employers for better work quality.

More than one-third of advertising professionals plan to leave their current positions within the next two years



How long do you expect to stay at your current job? | Base: Total Respondents (n=150)

Top Improvements Advertisers Would Like to See



Which of these changes would you most like to see at your organization? | Base: Total Respondents (n=150)

ON AVERAGE, ADVERTISERS CAN FOCUS ON A TASK FOR ABOUT 35 MINUTES BEFORE BEING INTERRUPTED, WITH MOST (87%) SAYING NO MORE THAN AN HOUR.

ENABLING & ENGAGING MARKETERS DRIVES RESULTS

Leadership concerned with employee retention, or even empowering already short-handed teams, can look to minimize friction points from campaign planning to financial reconciliation. Marketers face the challenge of identifying and vetting point solutions across multiple dimensions, including but not limited to whether a point solution: solves for the primary business need; replaces or enhances existing software solutions; is interoperable with existing software and systems; protects proprietary data; minimizes duplication in reporting results; provides access to training resources and – finally – improves business results.

ACCESS TO TRAINING IS ESSENTIAL & IN-DEMAND

The complexity and challenges of executing and managing digital advertising campaigns has grown exponentially over the years. Despite the increased necessity for guidance, nearly half of advertising professionals work at organizations with no or low-quality training programs.

In Their Own Words.

Respondents shared where they would turn their attention if more time opened up in their typical workday.

“ Staying up to date on emerging trends and platform updates to provide innovative recommendations to clients.
—MANAGER, BRAND

“ More training on new platforms or having time to get certified even on current platforms. More training and education.
—DIRECTOR, BRAND

“ Continue professional education/ courses/ learning about new aspects of this field.
—EXECUTIVE, BRAND

Turnover exacerbates the training gap and could compound dissatisfaction for remaining team members. **Marketing professionals report that training new employees and hiring quality employees are the top challenges when someone leaves their company.** Without a centralized, accessible source of training, some team knowledge and efficacy are lost.

Top Challenges When Someone Leaves Their Company

58% Training new employees

57% Hiring quality employees

51% Loss of client-related knowledge

50% Loss of institutional knowledge

Which of the following are challenges when someone leaves your company?
Base: Total Respondents (n=150)

STRATEGIZING AND PROGRAMMATIC MEDIA BUYING REQUIRE THE MOST TRAINING

Areas of Media Buying

Percent Ranking #1-3 | (Sorted by rank 1)



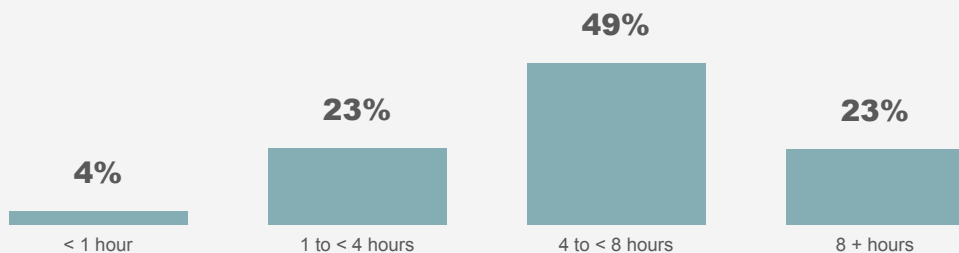
Which parts of the media buying process require the most training?
Base: Total Respondents (n=150)

Programmatic advertising is an area that calls for even more guidance and education than others; **programmatic and ad tech roles rank second as being most difficult to staff and require the most training.** Without training on programmatic activation, management and best practices, a plan cannot benefit from programmatic’s high reach, plentiful targeting options, and real-time decision-making.

AUTOMATION INCREASES PRODUCTIVITY & SATISFACTION

For most marketers, time spent working outside of official hours increased during the pandemic. But where does the time go? Advertising professionals report spending an average six hours per week on low-value, repetitive tasks. About one in four report even less efficiency, diverting 8+ hours per week from higher-level, strategic work

NUMBER OF HOURS SPENT ON LOW VALUE REPETITIVE TASKS



 **AVERAGE 6 HOURS**

How many hours per week do you spend on low value, repetitive tasks like cleaning data, merging sources, data entry, checking pacing, etc.?
Base: Total Respondents (n=150)

Without automation, workflows are fraught with repetitive and mundane tasks from planning through billing reconciliation leading to decreased productivity. Marketing professionals report that **successful workflow automation would allow more time for strategic thinking and creativity, more time for optimization and analysis, and an overall increase in productivity**

9 AVERAGE HOURS

in a typical week that could be saved through automation of redundant and low value tasks.

What would be the top benefits of successful workflow automation at your job?
Thinking about your typical week, how many hours do you think you could save through automation of redundant and low value tasks?
Base: Total Respondents (n=150)

Top Benefits of Successful Workflow Automation

63%

More time for strategic thinking and creativity

54%

Increased productivity

47%

More time for optimization and analysis



INTELLIGENT PROCESS AUTOMATION

Intelligent Process Automation involves self-learning systems that improve through data mining, pattern recognition, and data analysis to make better decisions. As the digital advertising industry continues to evolve with next-generation mediums, formats, and channels, there may be an increasing need to consolidate, streamline, and automate media purchasing processes.

END-TO-END STREAMLINING FOR HOLISTIC VIEWS AND CONSOLIDATION

For a typical campaign, marketers need to reach across point solutions in an attempt to optimize, and measure across their entire plan. Furthermore, each solution has its own unique specifications and pricing methodologies which need to be tracked and accounted for. The majority of advertising professionals use an average of nine platforms for a typical ad campaign, and touch seven of those platforms in a day. Virtually all respondents work with outside tech vendors, employing an average of six ad tech/media partners on a typical campaign

SOFTWARE/PLATFORMS USED IN A TYPICAL DAY

9 AVERAGE SOFTWARE/PLATFORMS

used for a typical campaign.

1	Social media buying platforms	71%
2	Search platforms	69%
3	Media buying/activation	66%
4	Communication tools	66%
5	Campaign measurement	64%
6	Media research	57%
7	Data analysis and visualization	55%

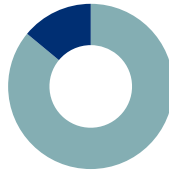
What types of software/platforms do you use during a typical day?

For a typical campaign, how many different software/platforms (media research, planning tools, DSPs, analytics, agency: client communication brand: internal communication, billing, etc.) do you use (excluding email and other MSFT/Google productivity tools)?

Base: Total Respondents (n=150)

Percent of Advertisers Who Work with Outside Tech Vendors

14%
NO



86%
YES

Do you work with outside ad tech vendors (i.e., The Trade Desk, DoubleVerify, Magnite, Google, Facebook, Centro)?

Base: Total Respondents (n=150)

6 AVERAGE NUMBER

of ad tech and media partners used on a typical campaign.

How many ad tech and media partners do you work with on a typical campaign?

Base: Working with Outside Ad Tech Vendors (n=129)

Agency professionals in particular rate the increase in different transaction methods for buying media as the #1 contributing factor to ad industry complexity. When selecting a programmatic partner, pricing transparency and the lack of fully integrated technology are the biggest pain points in the selection process. One campaign can use a variety of combined buying methods. While 2 in 5 dollars are transacted via direct IOs, programmatic ad dollars are transacted programmatically via PMPs, RTBs, and increasingly programmatic direct.

9 in 10 advertising professionals agree that the advertising industry has become significantly more complex

FACTORS CONTRIBUTING TO AD INDUSTRY COMPLEXITY

72%

Increase in the different transaction methods for buying media

65%

Increase in the number of media channels

63%

Walled gardens

60%

Inconsistent media measurement tools across a campaign

57%

Consumer technology

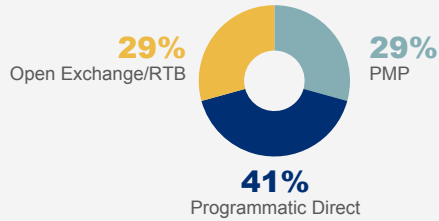
51%

The number of media buying tools necessary to complete a campaign

What factors, if any, are contributing to the increased complexity in the advertising industry? | Base: Completely/Somewhat Agree (n=137)

DIGITAL ADVERTISING BUYING METHODS

Average Percent of Digital Advertising Purchased Through Each Programmatic Channel

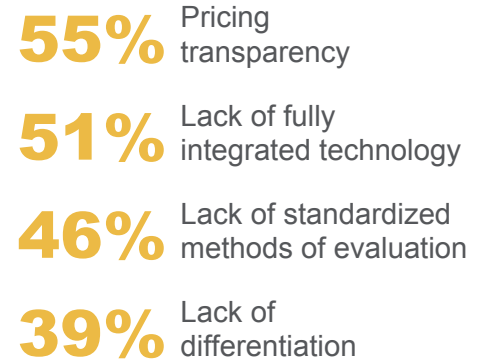


What portion of your company's programmatic digital advertising was purchased through these programmatic buying channels over the past 12 months?

What percentage of your company's digital advertising budget was transacted using an insertion order that is sent to publishers, DSPs, trading desks and ad networks over the past 12 months?

Base: Total Respondents (n=150)

Pain Points When Selecting a Programmatic Partner



What do you consider to be pain points in the programmatic partner selection process?
Base: Total Respondents (n=150)



43% is the average portion of budget transacted using an insertion order over the past 12 months. Programmatic ad spending will represent 91% of US digital display ad spend by 2023 (eMarketer). That segment will continue to gain market share within digital advertising due to the inherent benefits it offers such as enhanced audience targeting, attribution, measurement, and improved customized campaign management workflow solutions.

More than 2 in 3 advertising professionals have media plans broken out by channel. Only 1 in 4 respondents approach their media plans holistically. Those respondents who do have a holistic perspective are utilizing that advantage--3 in 4 check the overall performance of their ad campaigns at least weekly.

Media Plans That Are Holistic vs. Broken Out by Channel

Are the media plans you work on holistic or broken out by channel?
Base: Total Respondents (n=150)

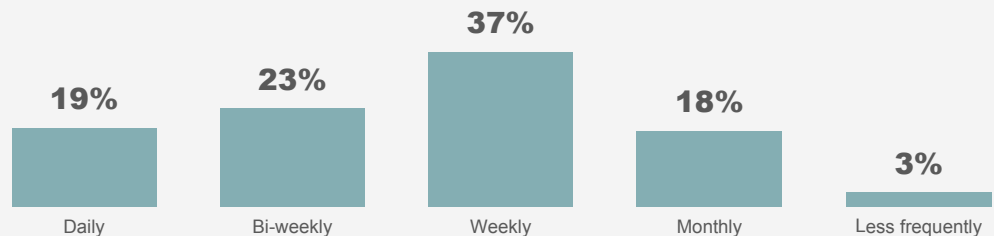
68%
Broken out
by Channel

26%
Holistic

6%
Don't Know

FREQUENCY OF LOOKING AT THE HOLISTIC PERFORMANCE OF A CAMPAIGN

2 IN 5
monitor campaign
performance multiple
times a week



How often do you look at the holistic performance of a campaign, as opposed to channel-based performance (e.g., DSP performance, search performance, etc.)?
Base: Total Respondents (n=150)

The importance of programmatic technology to the growth of the digital advertising ecosystem is obvious, but it is just one of the numerous elements to account for in holistic media buying and planning needed for a healthy digital advertising business.

CONCLUSION

The media planning and buying marketplace is so disconnected that inefficiencies are bound to arise. These various stages and people involved cause advertisers to seek solutions that improve daily output. There is an increasing and urgent need to consolidate, streamline, and automate media planning, buying, optimization, reporting, and financial processes to deliver on business goals. And it's imperative to do so in a way that retains, enables and empowers team members.

KEY TAKEAWAYS

- 1** The proliferation of point solutions has muddied the marketplace, as well as increased the breadth of skills and tasks required to be a successful marketer. Organizations should make every effort to streamline processes and reclaim time for teams to strategize toward business goals.
- 2** Access to high-quality training and education is paramount due to the convoluted nature of the advertising marketplace, and the need for continuity when a marketer transitions off of a team.
- 3** Marketers don't feel empowered to do their best work, often undermined by the sheer volume of tools of the trade. Automating tasks recaptures time for strategic thinking and optimization, from the planning phase forward.
- 4** Comprehensive software solutions that integrate a range of media choices, creative executions, buying methods, and pricing models enable holistic campaign planning, implementation and measurement with significantly less friction.



ABOUT ADVERTISER PERCEPTIONS

Advertiser Perceptions is the global leader in research-based business intelligence for the advertising, marketing, and ad technology industries. Our expert staff delivers an unbiased, research-based view of the advertising market with analysis and solutions tailored to clients' specific KPIs and business objectives. These insights provide clients with the confidence to make the very best organizational, sales and marketing decisions, driving greater revenue and increased client satisfaction.



ABOUT BASIS TECHNOLOGIES

Basis Technologies, formerly operating as 'Centro,' is a provider of cloud-based workflow automation and business intelligence software for marketing and advertising functions within enterprises. Its SaaS platform is composed of a suite of integrated applications that automate manual operations, standardize business processes, and improve marketing and advertising performance. The technology provides a comprehensive selection of buying methods across all channels and devices, utilizing all major creative types and formats.

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