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According to IHAF's latest research, 25% of in-house agencies are actively using Generative AI which is a significant increase from the 4% using it the previous year.

EMILY FOSTER, DIRECTOR
IHAF, IN-HOUSE AGENCY FORUM

We primarily offshore production graphic design. This allows us to efficiently handle high volume, fast turnaround work, ensuring our in-house team can remain agile and focus on strategic and creative initiatives.

LEEANNE BRIERLEY, OPERATIONS DIRECTOR,
MARKETING COMMUNICATIONS
ASHFIELD MEDCOMMS, AN INIZIO COMPANY



The 2025 Global Benchmark Report for Content Production

In-House, Offshore & Automation



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Introduction

As we embark on the 5th industrial revolution, with greater collaboration between humans and advanced technology, we are now more connected, more integrated and more automated than ever before.

In a world of hyper-digitalization, companies are rapidly exploring how best to use AI agents combined with resource models that can scale, in order to create seamless and personalized experiences for customers, and to streamline business processes. This, in turn, opens a chasm of opportunity to shift their focus to creative strategy and higher-level creative services, working in partnership with marketing to find the balance between creative excellence, marketing performance and an uplift in brand equity.

2024 saw many significant global shifts in technology, working practices, sustainability, the geo-political landscape and economic growth, all of which directly affected consumer behavior and brand engagement. For many in-house agencies and marketing teams, it's

been both exhilarating and exhausting, with many coming through the challenges more resilient and willing to lead the charge in 2025. Experimentation and adoption of AI will transition to functional and operational change, with tangible, demonstrable benefits.

As we move through the gears of 2025, content volumes continue to increase; the ROI demands are at an all-time high; the pace of production is at breakneck speed, but the necessary change needed to facilitate the growing consumer demand is underway.

80%

of C-suite executives globally believe AI will kick-start a cultural shift where teams are more innovative.

WORLD ECONOMIC FORUM

1 out of every 2 companies, doesn't currently have an AI strategy for content production.

In 2025, automation adoption will become omnipresent. We'll see greater investment in the skills needed to embrace AI and resource modeling will drive up offshore volumes, as the industry finds ways to stay on top of the insatiable content demands.

With AI driven automation reducing turnaround times by up to 90%, and offshore production underpinning automation with resource savings on average at 40%, combining these two models will give in-house teams and marketers their greatest 'bang for buck'.

33%

of companies are saving between 40% and 60% through offshore production.

With every facet of content development moving at pace, leaders are creating processes, practices and building teams around 'composable change'. This business approach encourages organizations to 'change often, change to grow and readily adapt and respond quickly to market shifts and opportunities'; this approach moves change from an 'unknown risk' to a 'known tool'.

People and talent strategies will dominate both investment and efficiency conversations in 2025. As in-house teams reposition themselves as full-service agencies, taking on significantly more strategic, planning and tier 1 creative responsibility.

Greater investment in people skills around MarTech, AI and automation will be a necessity to overcome the lower tier production needs. In parallel, the reliance on offshore production teams will continue to grow, as short-medium term commercial efficiencies are needed as the automation and AI change programmes bed in.

We're delighted that this year, as well as publishing results from our global survey, we have interviews with in-house, agency and technology leaders, from industry bodies, healthcare, retail, advertising, telco, publishing, sports betting, gaming, banking and financial services. Our spotlight interviews span North America, UK, Europe and Australia. These interviews provide the latest insights and thoughts on 2025 challenges, budgets and spend, production models, AI, automation, offshore production and sustainability.

We hope you enjoy the various insights from this year's report and, as always, we're very grateful to everyone who contributed to The 2025 Global Benchmark Report for Content Production: In-House, Offshore and Automation.



Methodology

TKM Consultants work with brands and agencies around the globe to understand and share the latest business insights and consumer trends impacting marketing, advertising, creative services, technology solutions and AI, in all it's forms!

This year's 2025 global benchmark report delivers the most up to date and unique insight relating to how content production models are evolving to keep up with the pace of demand. The advertising industry is experiencing significantly higher volumes of content to keep up with complex buying journeys, more sophisticated content (including immersive and extended reality) and the rapid shift to utilizing technology, processes and content underpinned by AI.

This report has been developed in partnership with **We Are Amnet**, pioneers in global offshore creative production and the **leader in Smartshoring®**; a progressive hybrid model of offshore creative productions hubs and regional client services teams that deliver commercial value and flexible resource while ensuring culture, communication, speed and quality are always on point.

As the total marketing spend allocated to production continues on its upward trajectory to thirty percent and beyond, having access to a variety of resource models to extend capacity, flexibility, agility and skills is a high priority for both in-house teams and agencies looking to keep up with demand.

Production eco-systems are more dynamic and multi-faceted than ever before, but success is often based on a sense of interconnectedness, strong communication and collaboration, an ability to flex, adapt and scale and well as the effective use and integration of existing and emerging technologies, from automation to Generative AI to DAM and brief optimization.

Finding the balance between creative automation and flexible resource models will be paramount to success in 2025, as brands look to capture ongoing value, and create new value

for the brands they are building and markets they are addressing.

This report unveils a host of observations and brings to the surface the latest industry insight and analysis relating to:

- **The biggest challenges for in-house and marketing teams in 2025, in relation to producing content**
- **Where production budgets are being spent and with whom**
- **From Creative Ideation to Post-Production, where are the disciplines most commonly managed?**
- **If you had more budget, where would you spend it?**



- **What percentage of content production is being managed through automation?**
- **What are the biggest challenges around the use of AI, and where is AI being used most frequently?**
- **Which assets are most commonly produced offshore and what are the percentage savings you should expect?**

This year's report is a combination of both qualitative and quantitative analysis, based on:

1. A 25-question survey completed by industry experts representing in-

house agencies, marketing and brand teams, independent agencies, network agencies, procurement teams and consultancies working across marketing production, operations and technology.

2. A selection of interviews with directors and in-house industry leaders, including those in financial services, telco, retail, publishing, sports betting and healthcare. For the external viewpoint, we also spoke with specialist consultants.
3. Thoughts and opinions provided from industry bodies representing the in-house community, including the In-House Agency Forum (IHAF) and the Inside Out® community.

**47% of all responses
were from in-house and
brand teams**



**36% of all responses
were director-level**

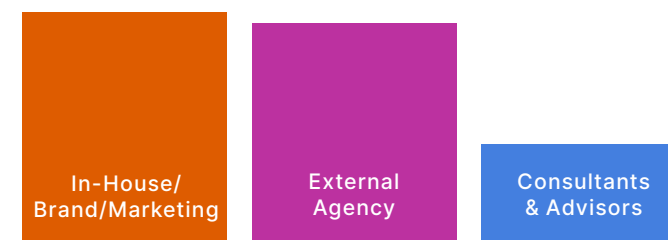


Who completed the survey?

This year 42% of the responses came from in-house Agencies, brand and marketing teams. 40% came from external agencies and 18% came from industry specialists and consultants working alongside creative, production, digital, performance, data and media teams.

In-House, Brand and Marketing teams were the most represented community for the 2025 Global Benchmark Survey.

HOW WOULD YOU BEST DESCRIBE YOUR BUSINESS/DEPARTMENT?



Diverse roles across the content eco-system

Managing Directors from in-house and external agencies made up 33% of responses and were the most represented role, followed by Studio Directors, Production Leads and Operations Directors.

Marketing Directors and Marketing Operations accounted for 16% of the survey.

HOW WOULD YOU BEST DESCRIBE YOUR ROLE?

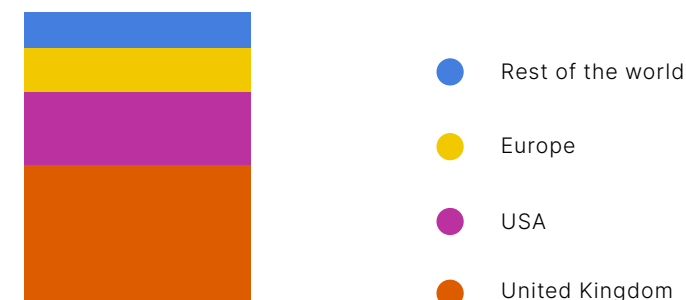


Participants locations

To fully understand the challenges associated with content production, at scale, we needed to ensure global representation. We were keen to delve into the challenges and common threads from one region to another, especially among the in-house community, as in-house teams mature.

UK (48%) and US (25%) were the most represented of all countries followed by ROW (15%, including Australia, South Africa, UAE, New Zealand and Argentina) and Europe (12%, including Spain, France, Sweden, Denmark and The Netherlands).

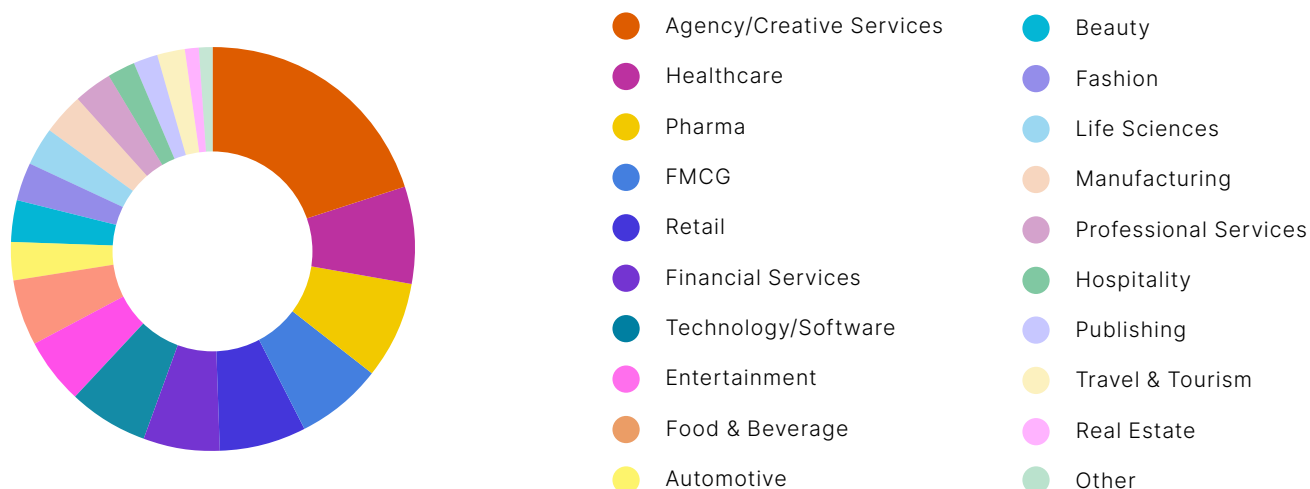
WHERE IS THE HQ OF YOUR COMPANY?



Industries represented

This year's report showcases a diverse and dynamic mix of industries. Brands and in-house teams participated from sectors including healthcare and pharma, FMCG, retail, financial services, technology, entertainment, food & beverage, automation, beauty, fashion, life sciences, hospitality, and publishing. Complementing this variety of sectors were teams specifically representing agency and creative services, providing a robust foundation for the report's insights.

RESPONSE BY INDUSTRY



As in previous years, we conducted 'spotlight' interviews with senior in-house leaders across various industries, including financial services, healthcare, telecommunications, sports betting, gaming, and publishing.

These discussions offered valuable perspectives and ideas on the macro challenges in-house teams are likely to face in 2025.

To ensure a well-rounded view, we also engaged specialist consultants with expertise in creative operations, AI, MarTech, and automation, contributing additional insight to this year's report.

Lastly, we are thrilled to include the thoughts of Emily Foster, Director of the In-House Agency Forum (IHAF) and Emma Sexton, Founder of the Inside Out® Community.

IHAF (In-House Agency Forum)	THREE
POPULAR BANK	ENTAIN
ASHFIELD MEDCOMMS INIZIO MEDICAL	i-h-a-r in-house-agency-review dahling
INSIDE OUT® COMMUNITY	CENGAGE
MANMACHINE	THE HALLWAY



“

We currently utilize a mix of production models to fulfill our project requirements. Our internal team focuses on creative tasks and brand consistency, while we also engage freelancers for additional support and expertise when needed.

As our marketing efforts grow, we are looking for more cost-effective and scalable solutions. We are considering the option to employ offshore teams for specific Tier 2 and Tier 3 production tasks such as artwork adaptation, localization, and high-volume content versioning.

This strategy will enable us to prioritize essential creative work, optimize resources, and enhance content production efficiency.

ALBERTO ERAZO
VP, CREATIVE DIRECTOR
POPULAR BANK
(November 2024)

NEW
YORK

A 60 Second Summary...

People and talent strategies dominate the most significant challenges facing in-house teams this year. 'Access to lower cost skills and resource', 'access to additional talent and resource' and 'access to flexible resource models for seasonal changes' were highlighted as the priorities for 2025.

The repositioning of in-house teams to full-service agencies. In-house teams are starting to dominate ownership and budget for insight, strategy and ideation as well as content creation & production, post-production and distribution. Media buying continues to be the preserve of external agencies. Typically, 60% of production spend is now attributed to in-house teams and up to 20% is managed offshore.

Talent over technology is still preferred if additional budget was available. Many organizations' ability to adopt technology swiftly and push through effective change is limited due to cultural resistance, a skills deficit (especially around AI) and adequate time. Finding the balance between talent and technology in 2025 will be paramount.

Expertise and turnaround times are the most important criteria. Expertise and turnaround times are considered the most important assessment criteria when evaluating an offshore partner. Digital and social content are the services that are most regularly offshored and average savings are between 40% and 60%.

A 60 Second Summary...

Automation of content has risen to 20% of total production for almost half of all companies. Speed of production is positioned as the single biggest advantage of automation. 22% of companies have not yet started their automation journey.

A change in internal culture was considered the primary obstacle for the effective adoption and utilization of automation. The successful adoption of automation should be anchored in a cultural shift, while technology limitations should be understood and accounted for.

AI strategies are in their infancy.

Over 50% of businesses stated that they don't have an AI strategy for content production. Primary reasons included culture, expertise, legal & regulatory frameworks and availability of time.

Social sustainability (equity, inclusion & wellbeing) is considered the most important of all sustainability issues when assessing a production partner. Closely followed by environment and economic sustainability.

8 Key Predictions for MarTech, Automation & AI within Production

BY GARETH CHILTON, FOUNDER, MANMACHINE

1 A shift in the AI story with the initial hype surrounding gen AI to subside somewhat. This should lead to a more measured and practical application of AI technology in marketing strategies.

2 Speeding up of the move towards a united creative and marketing ecosystem which joins creative production and automation tools with larger MarTech eco-systems. This will shift Creative Operations from being a standalone function to a more integrated part of the marketing funnel.

3 More emphasis on automated compliance and brand governance, automating checks for regulatory compliance, legal approvals such as claims management, and adherence to brand guidelines.

4 Rise of always-on production pipelines. Global 'follow the Sun' creative workflows will dominate, allowing in-house and offshore teams to seamlessly produce content on a continuous basis.

5 Insights-driven production will enable continuous optimization, where creative teams (both in-house and offshore) make data-backed decisions for iteration and scaling.

6 Continued evolution of generative AI becoming more intuitive, resulting in a greater ability to augment and empower creatives.

7 Continued shift to modular creative production, where assets are broken into reusable components, will become more ubiquitous.

8 Decentralization of product ownership, empowering offshore hubs with greater autonomy. Advances in MarTech are allowing them to function as near-independent creative eco-systems.

Read the full interview on page 63.

Key Findings

Q1: What are your biggest challenges for producing content this year?

A significant technological evolution has transformed industries, processes and society in general, and has meant an even greater need for commercial adaptability and production agility, especially for brands looking at their resource models, technical skill sets and creative talent pools to enable content production at scale.

Marketers, agencies and in-house teams have moved from exploratory mode into rebuilding their content eco-systems to align with consumer demand and a complex consumer journey, fueled by continuous socio-economic changes and technology advancement.

According to Gartner's CMO spend survey, marketing budgets took another hit in 2024, at 7.7% of company revenue, down from 9.1% of company revenue in 2023. With ad spend fast approaching \$1 trillion, audiences are demanding greater personalization and more relevant content, that resonates regionally and demographically, to help overcome content saturation and audience fatigue.

Organic reach has seen a significant decline over the past 12 months; Facebook is down to less than 5%, in some cases closer to 2%, Instagram is between 5 and 10%, and X is hovering at just above 1.5%. To counter declining organic visibility, brands are investing more in paid promotion to ensure their content is seen.

Consumers are now spending 12.5 trillion online per year. Using an average of 7.5 social media platforms per month, with 4.62 billion active social media users.

Companies spend between 11% and 16% of their marketing budget on social media and expect a sharp rise over the next 5 years.

CMO SURVEY 2024



Brands are looking at creating high-value, differentiated content to stand out and build meaningful relationships with their audience. Balancing quality, speed and scale with talent shortages and significant time pressures remains a challenge for most content and in-house teams.

Whilst AI tools promise efficiency, integrating them in existing workflows can be a challenge. Automation also continues to be a clear area of focus for many organizations in 2025, looking to harmonize creative craft and production at scale. Automating repetitive production and workflow tasks to free up resources and time for strategy, planning and creativity is a priority for 2025.

The pace of production is faster than it ever has been, and is unlikely to slow, putting pressure on resource models & lead times.

WHAT ARE YOUR BIGGEST CHALLENGES FOR PRODUCING CONTENT THIS YEAR?





In this year's survey, the top-scoring challenges align closely with broader macro issues that organizations are working to solve, specifically around **'people and talent strategies'**. The most significant challenge identified was **'access to lower-cost skills and resources'**, highlighting the growing dependency on offshore production, coupled with a greater reliance on automation to alleviate the resource pressure. This trend is especially noticeable among **in-house agencies**, reflecting a strategic shift to optimize production capabilities while managing costs effectively. Four additional challenges scored highly:

1. Resource: access to additional talent is a challenge, due to the increasing volume of content across platforms. Companies need to hire more creative talent, despite the growing competition for talent across in-house, independent and network agencies. In-house teams are using a variety of techniques to retain talent, including career pathways and prioritizing career development, mentor programs, flexible working practices, mental health support, comprehensive benefits packages,

addressing burnout, being purpose driven and a positive work culture.

2. Access to flexible resource models to manage content production during seasonal changes is an ongoing challenge. Probably the most common of all the models currently being used is the **hybrid model of in-House with offshore and freelance** for peaks and troughs. Other models include **project-based**, where resources are used on a project-by-project basis. The **on-demand** model where agency/offshore partners or freelance platforms are used to facilitate an unpredictable workload. The **global delivery model** where work is distributed across geographic regions and the **technology-augmented** model, which focuses on integrating AI and automation tools into the workflow to scale production efficiently. These models aren't mutually exclusive, and offshore production teams can feature fairly heavily in all of them, as either flexible resource options or enablers of technology. Determining the cadence of your content and business culture, will help define which model is most suitable for you.



Staffing will continue to be a challenge in 2025.

We have enough work to employ more, but managing headcount is extremely important.

We need to keep the wheels turning and we need to attract the right talent but also work within the process and respect the procurement framework defined by the business.

JAMES MATHERS
HEAD OF OPERATIONS
THREE, IN-HOUSE CREATIVE AGENCY

3. Delivery of shorter lead times: the pace of production is faster than it ever has been and is unlikely to slow. The sheer volume of content creation due to the proliferation of social media and streaming platforms has meant daily asset generation has increased in pace to keep up with consumer behavior, resulting in shorter lead times.

An ability to find production models that can deliver assets overnight through multiple studios, facilitated by 24/7 shift patterns and automation will be necessary to shorten lead times.

4. Ensuring the brief, creative and production are working together effectively: this was the standout challenge in the 2024 Benchmark Report and is ranked in the top three again this year.

It is essential to include representation from creative, art direction and production teams early on in any creative process. Devising the strategy, vision and ideas in conjunction with how best to bring those ideas to life, will mitigate any risks round misinterpretation and ensure final outcomes match the intended vision.

Spotlight Interview: Banking & Financial Services



ALBERTO ERAZO
VP, CREATIVE DIRECTOR

POPULAR BANK
(November 2024)

What are the three biggest creative and content challenges you see for your business/team in 2025?

In 2025, my team will face three main challenges.

First, the growing demand for personalized content across different channels. The ongoing need to produce quality content to meet the demands of multiple stakeholders and target and engage multiple audiences. The challenge is to deliver personalization at scale without losing the authenticity that makes our brand stand out.

The second challenge is demonstrating creative

efficacy and its impact on the company's bottom line. Operating in a budget-constrained environment prioritizes proving the value that we bring to the table. That means that all creative work, but especially content, must perform consistently well, remain authentic and compelling, and contain a measurable element that ties it to the business goals.

The third challenge is limited resources. While we embrace creative innovation, limited budgets restrict our ability to invest in the latest technologies or experiment with newer approaches. We need to be strategic in allocating our resources that focus on impactful creative work.

Are your content budgets increasing, decreasing or about the same as last year? If you had extra budget, where would you spend it?

Our budget has remained steady compared to last year. Currently, we are focused on showing the effectiveness of marketing efforts across

the business. If additional budget were to become available, I'd give priority to two main areas:

1. Prioritizing staff development and recruitment. The creative landscape is always changing, so it's important to keep our skills up-to-date. Investing in training programs to up-skill our existing staff, particularly in such areas as advertising, production, and data analytics. Moreover, I'd hire talent with expertise in these fields to ensure that we have the capabilities to execute innovative campaigns to set our brand apart from competition.
2. Enhancing content optimization and analytics, with a focus on brand activations. We do currently track content performance, but there's room to improve, especially in measuring our brand activations. I would invest in advanced analytics tools to gain deeper insights into audience behavior and engagement. Such data will allow us to refine our strategies and maximize the impact of our efforts.

Spotlight Interview: Banking & Financial Services



ALBERTO ERAZO
VP, CREATIVE DIRECTOR

POPULAR BANK
(November 2024)

To what extent are you incorporating automation and AI into your content production? Any lessons learned so far?

We've incorporated automation and AI into our content production process to boost efficiency and creativity. For project management automations, we rely on Monday.com, which has streamlined our workflow and simplified project and time tracking for our team. As a result, we successfully managed more than 700 projects last year with a relatively small team.

On the creative side, we leverage Figma's auto-layout feature to resize digital assets at scale, drastically accelerating our production speed. Figma's collaborative tools have improved collaboration between our writers and designers, resulting in more cohesive and impactful content.

We're also delving into the potential of AI for content creation. We've been experimenting with secure AI tools, primarily during the ideation phase, and have found that the key to unlocking the true potential of these tools lies in the art of prompting. Through effective prompts, we've overcome creative blocks, generated engaging social media posts, and even sparked grand creative concepts. While we're still in the early stages of AI adoption, we're excited about its potential to enhance our creative process and drive innovation. However, we have to be mindful of how much we can push within a more conservative, compliance-heavy industry.

Which production models do you utilize within your business? Is it primarily an in-house team? Do you outsource to offshore teams/external agencies/freelancers? Which services do you outsource?

We currently utilize a mix of production models to fulfill our project requirements. Our internal team focuses on creative tasks and brand consistency, while we also engage freelancers for additional support and expertise when needed.

As our marketing efforts grow, we are looking for more cost-effective and scalable solutions. We are considering the option to employ offshore teams for specific Tier 2 and Tier 3 production tasks such as artwork adaptation, localization, and high-volume content versioning. This strategy will enable us to prioritize essential creative work, optimize resources, and enhance content production efficiency.

When working with an external production partner how do you measure success?

First and foremost, the quality of the work is key. It must be outstanding, meeting the brief's requirements and aligning with our brand's aesthetic and messaging. Secondly, the strength of the relationship we cultivate with our partners is crucial. Open communication, mutual respect, and a collaborative spirit are fundamental for a productive and enjoyable working dynamic. Lastly, the partnership must make sense from a business perspective. We should see a return on our investment, whether through cost savings, increased efficiency, or the ability to scale our content production without compromising quality.

Q2: Across your marketing and content ecosystem, where are the following disciplines primarily managed?

The disciplines we surveyed were: insight and strategy, ideation, production, post-production, delivery, media buying and data.

The rapid rise of the in-house agency is set to continue, with many teams strengthening their skills base and extending their reach across the creative and production eco-system. With the exception of media buying, in-house teams are now a dominant force from strategy and creative ideation to CRM, content production, post-production and delivery. This aligns with insight from IHALC, with the majority of in-house teams identifying as a 'Creative Agency' as a oppose to a 'Studio', activating large campaigns across channels and developing tactical campaign ideas. For many in-house teams, competing with the lead agency is fast becoming a reality. Navigating this complex relationship will undoubtedly come with many challenges, for both the in-house team and the marketing stakeholders.

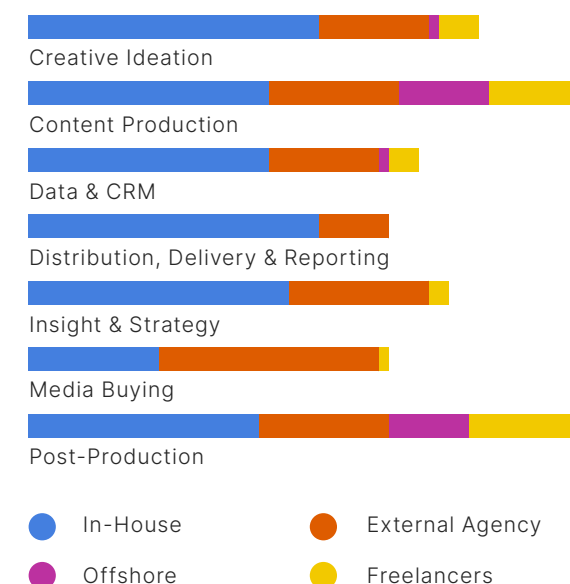
Offshore teams continue to play a crucial role in content production and post-production, often serving as an extension of the in-house

team or external agency, freeing those teams to focus on creative strategy, ideation and planning, in turn raising the creative bar. They typically handle all **tier 3 production**, such as repurposing, versioning, and edits, and some tier 2 including UX and transcreation. A growing trend in the market is the global consolidation of tier 3 production offshore, driven by organizations seeking substantial cost savings and enhanced brand consistency. Offshore production has also expanded into **tier 2 tasks**, including adaptive design, regional advertising, and branded content for social media and email marketing. Offshore production plays a vital role in meeting the increasing demand for higher production volumes.

The importance of the freelance community for the creative industry is clear. The growing gig economy, remote working and maturing freelance platforms, has provided an opportunity for freelancers to build professional networks quickly. However, for many freelancers, sustained work is a challenge. There is an element of over-saturation in a market which swelled following

the great resignation. Competition for work has intensified and the ongoing shift to offshore production for lower-cost production at scale will drive the freelance market to become more specialized, more personalized and more focused than ever before.

ACROSS YOUR MARKETING & CONTENT ECOSYSTEM, WHERE ARE THE FOLLOWING DISCIPLINES PRIMARILY MANAGED?





How are in-house production models changing and evolving as we enter 2025?

The question many of our Inside Out® community members are asking is ‘how do we influence everything, but not DO everything’. Technology, AI, Automation and offshoring all play a role here, and it really is dependent on the assets and the markets you need to reach.

I am always reluctant to generalize as the make-up of in-house creative teams varies so widely and are custom built for the business needs. What is right for one team is wrong for another. But what is a common focus for all of them is the need to keep creative strategy and thinking in-house, which is a complete 180-degree turn from where in-house teams started decades ago, which was usually to serve the creative production needs of the business.

EMMA SEXTON
FOUNDER & PARTNERSHIPS
INSIDE OUT® COMMUNITY



Q3: What percentage of your production budget goes to the following: in-house, offshore, external agency, freelance?

The share for in-house teams has the most balanced distribution, and in some cases is allocated up to 100% of production spend, reinforcing the maturity and exponential growth of the in-house team.

The most common scenario would be for **up to 60% of production spend allocated in-house, with the remainder split between offshore production, freelance and external agencies.**

Offshore production dominates the 0-20%

allocation, indicating potentially high volumes of lower cost services.

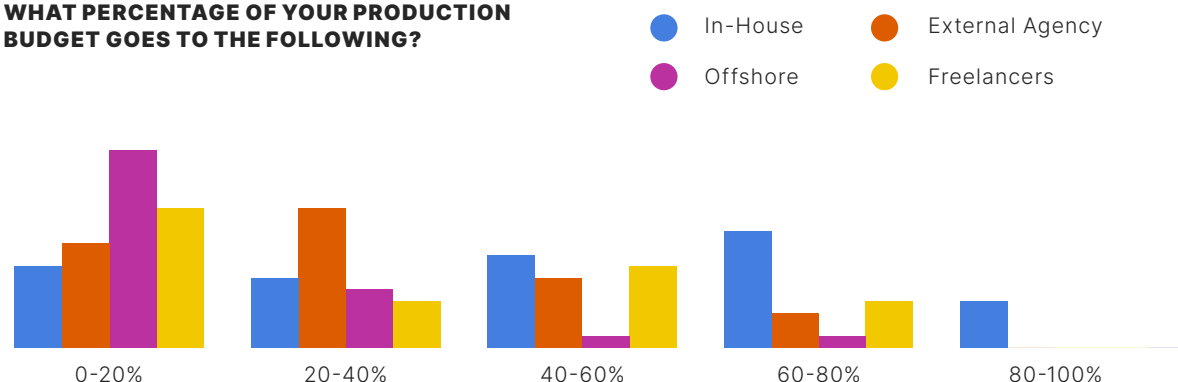
External agencies, dominate at the 20-40% allocation, and then this decreases significantly as the percentage budget range increases. This could be down to a number of factors:

- External agencies could be cost prohibitive at higher volumes and are more focused on higher tier production.
- Beyond a certain point, additional spend

with external agencies may not be commercially viable.

- Companies have a preference for in-house control with dedicated offshore set-ups.
- An increased reliance on offshore, offering similar expertise at lower rates, with an ability to scale.
- Automation tools and platforms are reducing the need for external agency support.
- External agencies are used for more creative, niche, specialist or emerging technology and innovation projects.

WHAT PERCENTAGE OF YOUR PRODUCTION BUDGET GOES TO THE FOLLOWING?



Offshore production is the most common model utilized for up to 20% of total production spend.



How are in-house production models changing and evolving as we enter 2025?

Most of our members rely on a variable labor model to extend the capacity on their teams.

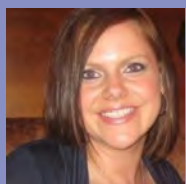
Some have a bullpen of freelancers they work with regularly. Some contract with staffing agencies for specialized talent. Some use external agencies and production teams to balance the load. And some go offshore for cost and turn-time advantages.

There are a lot of options teams employ that help them flex successfully.

EMILY FOSTER
DIRECTOR, IHAF
IN-HOUSE AGENCY FORUM



Spotlight Interview: Healthcare & Medical Communications



LEEANNE BRIERLEY
OPERATIONS DIRECTOR,
CREATIVE

ASHFIELD MEDCOMMS,
AN INIZIO COMPANY

What do you see as the three biggest content challenges for your business and team in 2025?

- 1. The rise of AI:** Ensuring we remain relevant, but authentic! We are very mindful we do not want to lose the human touch which is so important when developing creative ideas.
- 2. Accessibility:** In a world where everything is evolving, accessibility in content is certainly a hot topic. We are working hard as a team to ensure we develop assets that ensures content is accessible to everyone but more so people with disabilities and language barriers.

- 3. Diverse talent:** We are keen to attract and do a great job of retaining a diverse creative team, with wide reaching skill-sets. Ensuring we have people wanting to push the bar.

Are your content budgets increasing, decreasing or about the same as last year? If you had extra budget, where would you spend it?

Our budgets have been stable. However, there's a clear emphasis to maximize the value we extract from these budgets. Ensuring we demonstrate ROI is vital as clients seek to minimize costs. As a team, we're focused on allocating resources to align client objectives and maintain a high level of creative output.

To what extent are you incorporating automation and AI into your content production? Any lessons learned so far?

We're currently in the exploratory phase of integrating AI and automation into our workflow. While AI is undoubtedly a hot topic,

we're approaching it with a measured and strategic mindset.

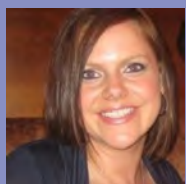
As we continue to explore the potential of AI and automation, we're committed to a responsible and ethical approach that prioritizes data privacy, security, and the quality of our content. We believe that by carefully considering these factors, we can leverage AI to enhance our capabilities and drive business growth.

Which services do you mostly offshore and why?

We primarily offshore production graphic design tasks. This allows us to efficiently handle high-volume, fast-turnaround work, ensuring that our in-house team can remain agile and focus on more strategic and creative initiatives.

By leveraging our offshore partner's expertise in production design, we're able to maintain a high level of quality while complementing our internal resources.

Spotlight Interview: Healthcare & Medical Communications



LEEANNE BRIERLEY
OPERATIONS DIRECTOR,
CREATIVE

ASHFIELD MEDCOMMS,
AN INIZIO COMPANY

Outside of the commercial benefits, what are the primary success factors of an offshore/Smartshoring model?

In addition to the commercial benefits, the primary success factors of an offshore model are scalability, flexibility, and access to dedicated teams of skilled designers.

For Inizio, partnering with our offshore partner has been instrumental in achieving these goals. Their ability to scale their resources to meet our fluctuating demands has allowed us to maintain a high level of productivity. Additionally, our offshore team's expertise in specific areas of production artwork has freed up our in-house team to focus on more creative and strategic initiatives.

If a company or in-house team was considering moving to an offshore/Smartshoring model, what advice would you give them?

If a company is considering moving to an offshore model, my advice would be to focus on building a strong and collaborative relationship.

This is crucial for ensuring seamless communication, understanding of your specific needs, and a high level of quality in the delivered work.

At Inizio, we've found that by treating our offshore partner as an extension of our in-house team, we've been able to collaborate efficiently which has significantly benefited our operations.

Our offshore team's deep understanding of our clients' demands and needs, combined with their flexibility to handle our fluctuating workload, has been invaluable.



We've found that by treating our offshore partner as an extension of our in-house team, we've been able to collaborate efficiently which has significantly benefited our operations.

Our offshore team's deep understanding of our clients' demands and needs, combined with their flexibility to handle our fluctuating workload, has been invaluable.

Q4: If you had more budget, what would you spend it on?

The two areas where additional budget would be spent, if available, are **'talent and technology'**. Defining the right mix of talent and developing existing talent are high priorities for in-house leaders.

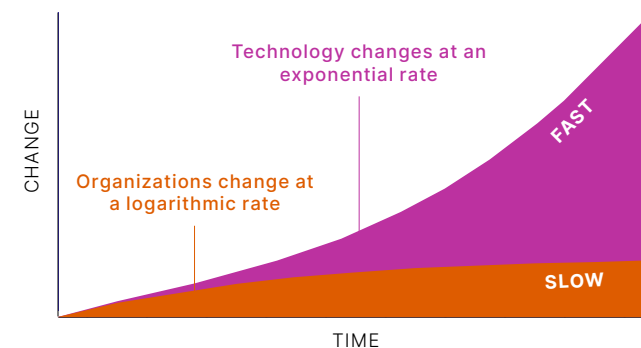
The need for more creative talent, including planners, creative directors, designers, art directors and copywriters is a natural evolution for the in-house agency, and a retention challenge for lead agencies who have historically owned these disciplines.

The salary levels for these roles in-house, is not yet at the same level as the lead agencies, but the gap is closing. Budget is freeing up, as more production is moved offshore or managed through automation ensuring in-house leaders can 'capture ongoing value' from their existing creative teams while 'creating new value' through 'savings-based investment'.

The requirement to invest any additional budget in more technology is highly nuanced. Investing in technology, whilst critical, is only part of the challenge. A large percentage of

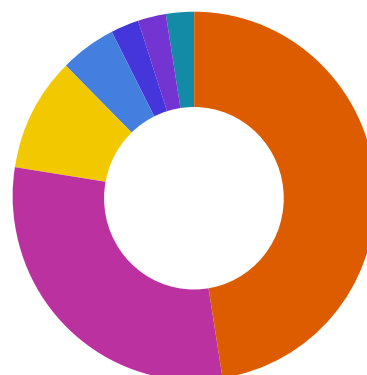
any budget should focus on managing change and adoption, whether it's automation, digital asset management, campaign management, project management, briefing, approvals, content distribution or reporting and performance.

Martec's Law, which has been in existence for many years now, still holds true. Technology in itself is not a silver bullet, our ability to adapt to change is where we succeed or fail with technology.



Martec's Law: Technology changes quickly; organizations change slowly. This change gap widens over time, eventually requiring a 'reset' of the organization. (Source: Scott Brinker @chiefmartec)

IF YOU HAD MORE BUDGET WHAT WOULD YOU SPEND IT ON?



- Talent & Resource (creative, production)
- Technology/MarTech/Automation/AI
- External Production (offshore, freelance, agency)
- Change Management & Process Optimization
- Equipment & Facilities
- Data Analysis
- Sustainability



If in-house teams had extra budget, they should consider spending it on strategy. Planning is the cornerstone of great creative work, yet it's often underrepresented in IHAs.

Many brands rely on insight teams, but strategic planning goes deeper-crafting briefs that unlock creative potential and evaluate work effectively. This role delves into audience, brand, and product truths to ensure every campaign addresses business challenges directly. Including strategists, in-house would elevate the creative output and align it with business goals.

EMMA TURNER, FOUNDER
i-h-a-r
in-house-agency-review
dahling

When evaluating technology, composable technology is fast becoming a must-have. This is a rapidly evolving design structure, with an emphasis on interchangeable, independent components that can be easily combined, scaled and adapted.

This approach enables greater flexibility and more interoperability. Coupled with composable technology, content teams

looking to invest in technology must do so with 'composable thinking'. This ensures companies focus on building technology stacks that can change rapidly, change often and change to grow.

Composable thinking supports leaders in mixing and matching business functions, models and technologies to orchestrate the outcomes they desire.

TRADITIONAL THINKING

DON'T FIX WHAT AIN'T BROKE

DELAY, CONTROL CHANGE

CHANGE TO KEEP UP

DESIGN TO LAST

STABILITY BY HABIT

THINK & BUILD LARGE SYSTEMS

CHANGE IS AN UNKNOWN RISK

COMPOSABLE THINKING

EVERYTHING IS CHANGEABLE

CHANGE OFTEN

CHANGE TO GROW

DESIGN TO CHANGE

STABILITY/FLEXIBILITY BY CHOICE

THINK & BUILD MODULAR

CHANGE IS A KNOWN TOOL

Source: Gartner

“

There has been a significant focus on AI-Driven Tools in the past 12 months, with 77% of the 3,000 new MarTech tools introduced in 2024 being AI-centric, particularly those focused on content-related tasks...2025 is shaping up to be an exciting year.

With the maturity level across many organizations reaching a tipping point, we anticipate seeing more strategic investment into internal teams and how they manage and utilize their MarTech to deliver.

GARETH CHILTON
FOUNDER
MANMACHINE



Q5: How long have you utilized offshore production as part of your production eco-system?

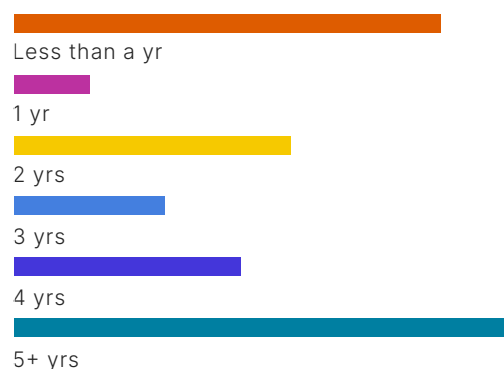
5+ years is now the most common length of time organizations have been using offshore production. Early adopters include external agencies who have been investing in offshore production for many years to drive down their own cost base.

Some of the largest network and independent agencies in the world, are investing heavily in their offshore studios. This facilitates volume and scale. In-house teams are moving to more progressive offshore models, including Smartshoring to ensure culture, communication and quality are on point, alongside the commercial benefits, which have become somewhat of a hygiene factor.

As well as external agencies, industries that were early adopters (5+ years) of offshore production and more recently Smartshoring, are often the more regulated industries. The necessity for greater compliance provides a backdrop of structure, governance and process optimization to facilitate remote global

production. Financial services (for PowerPoint and infographics), healthcare (for scientific drawings, infographics and PowerPoint) and FMCG (for packaging artwork and adaptive design) are industries that generally have the greatest levels of offshore production experience. More recently these same industries are now managing large volumes of social content, video post-production and CGI offshore, as consumer demands evolve.

HOW LONG HAVE YOU UTILIZED OFFSHORE PRODUCTION AS PART OF YOUR PRODUCTION ECO-SYSTEM?



If a company is considering moving to an offshore model, my advice would be to focus on building a strong and collaborative relationship.

This is crucial for ensuring seamless communication, understanding of your specific needs and a high level of quality in the delivered work.

LEEANNE BRIERLEY
OPERATIONS DIRECTOR, CREATIVE
ASHFIELD MEDCOMMS, AN INIZIO COMPANY

An Agency Point of View

INDEPENDENT PRODUCTION AGENCY

Offshore production has certainly come a long way. From what started as a means to reduce costs, offshoring now stands as a proven model of value optimization. As a production company, it is a given or you don't stand a chance.

We see Smartshoring® as an enhanced model of offshoring, where the original driver of costs (and turn times, quality) continues to be sacrosanct. Add serious technology enablement, communication at the speed of thought, and onshore client services and you have a very potent offering.

AASHISH AGARWAAL, CEO
WE ARE AMNET

NETWORK AGENCY

Today, we have over 4,000 people in India in Global Centers of Excellence in four major cities supporting our clients around the world. We are rapidly scaling and expect to triple these capabilities over the next 18-36 months.

JOHN WREN, CEO
OMINCOM

REF: BWMARKETINGWORLD.COM

Offshoring does not mean cheaper. It means qualified people at scale on a flexible model. It's about scaling...and making sure we have a flexible model that can adapt.

ARTHUR SADOUN, CEO
PUBLICIS

REF: CAMPAIGN ASIA

A significant proportion of responses indicated they had been using offshore production for 'less than a year' and are relatively new to offshore production. The content at scale challenge coupled with greater levels of personalization, is operating as a catalyst to brands embracing changing production models.

The likelihood is that a large percentage of these 'late(ish) adopters' are in-house teams, who have reached saturation in terms of tier 3 production. With freelance

costs increasing, and greater levels of localization, an alternative solution is needed, reflecting a growing trend for businesses to deploy offshore production as part of their creative operations.

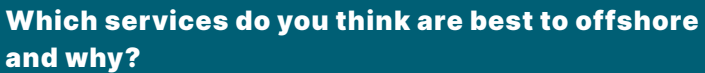
Industries where we have seen a recent significant uptake in offshore production due to content volumes, personalization and channel complexity, include retail (both online and high-street), leisure & hospitality and technology (software/e-commerce/streaming).

55%

of companies are using India as their primary offshore production hub. India ranked number one for the 6th consecutive year.

South Africa & Philippines (offshore), Costa Rica, Argentina (US nearshore) and Estonia (Europe nearshore) were also represented.





Offshoring is now becoming another option for teams who are not able to increase head count and need support with the ebbs and flows in the demands of their team across the year. Offshoring can really power your creative capabilities up at times of need.

33 | KEY FINDINGS



Spotlight Interview: In-House Community, IHAF



EMILY FOSTER
DIRECTOR

IHAF
IN-HOUSE AGENCY FORUM

In relation to producing content, what are the biggest challenges you see for in-house agencies in 2025?

Content is a significant focus of IHAs with our members expressing challenges in three key areas.

First, is coming up with new and different ways to connect with audiences who are supersaturated by content that's coming at them from all directions. So, creating content that resonates.

Second is keeping up with the demand for content by the corporate marketing partners.

And third is measuring how their efforts are impacting audiences. Dedicating resources to content creation only makes sense if there's a return on that investment.

If in-house agencies had extra budget, where do you believe they would spend it?

If budget was added, it would likely be invested in talent and resources. Our state-of-the-industry research tells us that 57% of IHAs are not staffed to meet the current demands of the business. Some of this is capacity, some is capability so budget for added headcount to keep pace with workload and skill-set demands is something we often hear as a pressing need.

Many in-house teams now view offshore partners as an important part of their production eco-system, a model that external agencies have adopted for a number of years, do you agree?

Most of our members rely on a variable labor model to extend the capacity on their teams. Some have a bullpen of freelancers they work with regularly. Some contract with staffing agencies for specialized talent. Some use external agencies and production teams to balance the load. And some go offshore for cost and turn-time advantages. There are a lot of options teams employ that help them flex successfully.

To what extent do you see in-house agencies incorporating automation, AI and personalization into their content production? Any lessons learned so far from your members?

According to IHAF's latest research, 25% of in-house agencies are actively using Generative AI which is a significant increase from the 4% who reported using it the previous year. Those using AI cite speed and productivity as key drivers of adoption. As for lessons learned, most teams are still in the early stages of exploring how best to deploy AI and its impact on the work, the team, and the creative culture.

Finally, for in-house teams how important is sustainability both internally and when selecting a production partner?

More and more of our member companies have sustainability practices that include environmental, social, and economic concerns. I would imagine that extends to sourcing. IHAs are certainly mindful of the importance of sustainability and are often tapped to develop the narrative to promote ethical, responsible corporate practices.

Q6: Of all the tier 2 and 3 services, which do you feel is most suited to being produced offshore?

Many global brands now utilize social media localization as their primary tactic for generating awareness and engaging with regional and local audiences.

This approach ensures content can be re-used and repurposed, whilst driving up brand equity and delivering a consistent user experience from one market to the next.

However, utilizing pure-play creative resource for re-versioning social and digital content, especially at the volumes now being briefed in, is both commercially inefficient and a waste of creative talent.

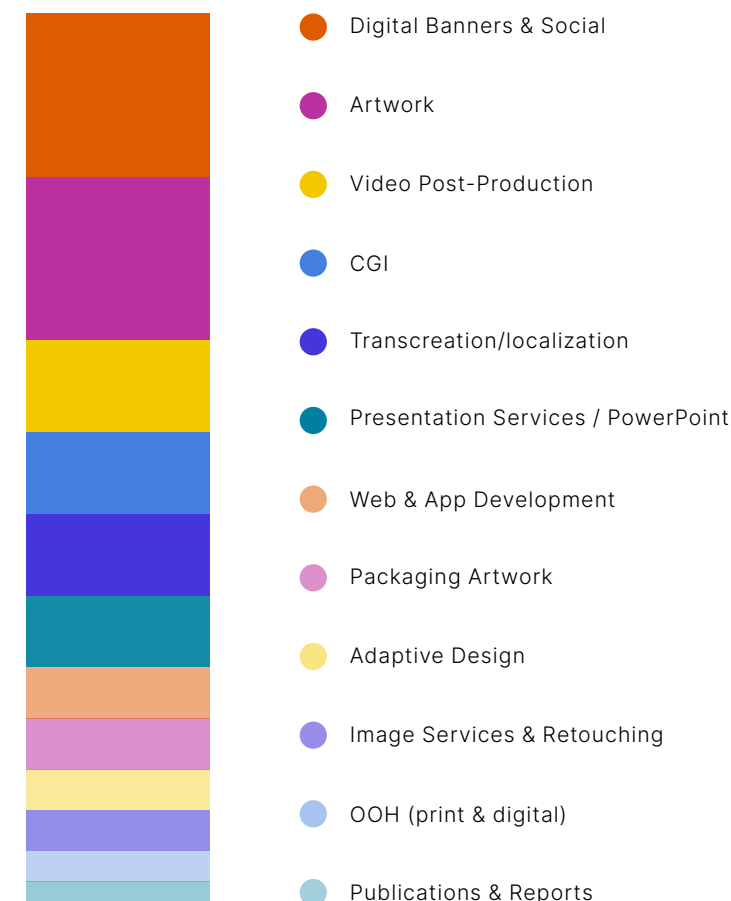
Talent retention is hard enough, without over burdening creative teams with tier 3 digital and social production. With over 5 billion social media users worldwide and the spend on social media advertising close to \$220 billion in 2024 (ref: sproutsocial.com), the need to find resource and automation solutions for digital and social re-versioning has never been greater.

An increased investment in social media content and the need to execute digital and social content localization at volume, has meant this service ranked number 1 as the service most suited to being offshored.

45%

of participants ranked Digital Banner Production and Social Content Localization as the service most suited to being produced offshore.

SERVICES MOST SUITED TO BEING OFFSHORED





Video post-production has been steadily moving up the ranks over the past 3 years, and has landed in the top 3 this year. The rise of video content is undeniable, with 89% of consumers confirming they'd like to see more videos from brands (Hubspot) and 52% of consumers more likely to share video than any other type of content (Hubspot).

The most popular forms of video content include product demo's, reviews and FAQ's and when it comes to branded content, relatable and authentic wins over high-production or over-polished.

Despite these numbers, many content marketers feel their organizations aren't using video to it's full potential, and a recent survey from socialshepherd.com suggested that 43% of companies may not have the skills or resource in-house (for filming and editing). As a result, external agencies for production, coupled with offshore post-production, are being used in tandem to support in-house teams.

This model is being adopted to facilitate greater levels of video content for brands to keep up with consumer demand and stay culturally relevant.



Services we would offshore include social content creation and production and website content creation and production, as we have limited bandwidth to support these areas effectively internally.

JENNIFER RAND, SENIOR DIRECTOR, BRAND STRATEGY,
MARKETING COMMUNICATIONS & SALES L&D
CENGAGE



Which progressive production models are enabling the growth of in-house teams?

With the rise of in-house agencies and the decoupling of production from creative, we're finding the biggest demand is in-house teams who need Producer support either because they lack certain skills in-house or because they are unable to scale fast enough. Secondly, we're seeing creatives who want to partner with Producers to enable them to offer a scalable, full service to their clients. In the case of in-house agencies, increasing volume demands means they value an external partner who's able to plug into their team with a scalable solution, especially in an increasingly global marketplace where clients need to make content or produce experiences and events in multiple markets simultaneously.

The other trend I'm noticing with IHA's is that many of them are taking on more of the level of work that was previously entrusted to an AOR, and they need to rely on an external Producer partner to plug the skills gap that their previous agency partner may have filled. We're finding that our unique model fits perfectly in this new era where production and creative are increasingly being decoupled, clients are making significantly more assets and doing so across multiple markets, and they see Producers as a unique discipline, able to help navigate the complexities of this new era.

DAN BANNISTER, VICE PRESIDENT, MAKERS



Q7: What are the most important assessment criteria when selecting an offshore partner?

1st

Level of expertise & capability

has ranked first for the third year running, with 39% of participants

ranking it as the number one assessment criteria. Expertise and capability should be fully assessed prior to formal on-boarding, through rigorous pilot and test projects, with a selection of multi-channel assets and pre-defined KPIs agreed. To set the teams up for success, training around brand guidelines, briefing and approval processes, technology and workflows should be established, documented and agreed through the phases of discovery, planning and testing, prior to roll-out.

2nd

Turnaround times have moved up the rankings, from fourth in 2024 to second in 2025. With 29% of participants ranking it

as the second most important criteria, when selecting an offshore partner. The sheer pace of production has increased significantly in recent years, due to the demand for 'rapid turnaround' content, a greater emphasis on localized content, the growth of the 'attention

economy' and a need for high-speed creative iterations to stay relevant and competitive.

Technological advancements of creative software powered by AI, more efficient and streamlined workflows and superior project management software have significantly lowered production times. With offshore studios, content creators also benefit from time-zone advantages, larger talent pools, production capacity scale-up and specialized teams all of which ensure tight deadlines and turnaround times can be met.

3rd

'Quality' & 'Communication'

both ranked equal third in this year's survey. Quality for all brands is non-negotiable,

and is seen as the number one factor when measuring overall success later in the report. There is now a pragmatic approach to offshore production and a recognition that quality will improve as the relationship beds in. 'Quality assessment' is therefore ongoing and quality should be monitored closely, but as long as the 'level of expertise' is available from day one,

quality standards should be achieved. Ensuring consistent design and production standards, colour profiles, regulatory compliance, accessibility and full alignment to brand guidelines is a 'must have' to build trust and long-term success. Effective feedback loops and robust QA checklists, will ensure continuous improvement. Excellent verbal and written communication, as with any external partner, whether offshore or onshore, is paramount to success.

Embracing Smartshoring, with local client service teams can ensure communication and cultural alignment. Smartshoring can mitigate risks with onboarding, campaign briefing and approvals management.

Setting up communication KPIs, using collaboration platforms, effective file sharing, project management platforms (e.g. Aasana, Trello, Workfront, Monday.com) alongside daily stand-ups or weekly huddles, as well as being clear on roles, responsibilities and providing recognition for great work can all assist with communication and building trust.



When working with external or offshore teams, key performance indicators include:

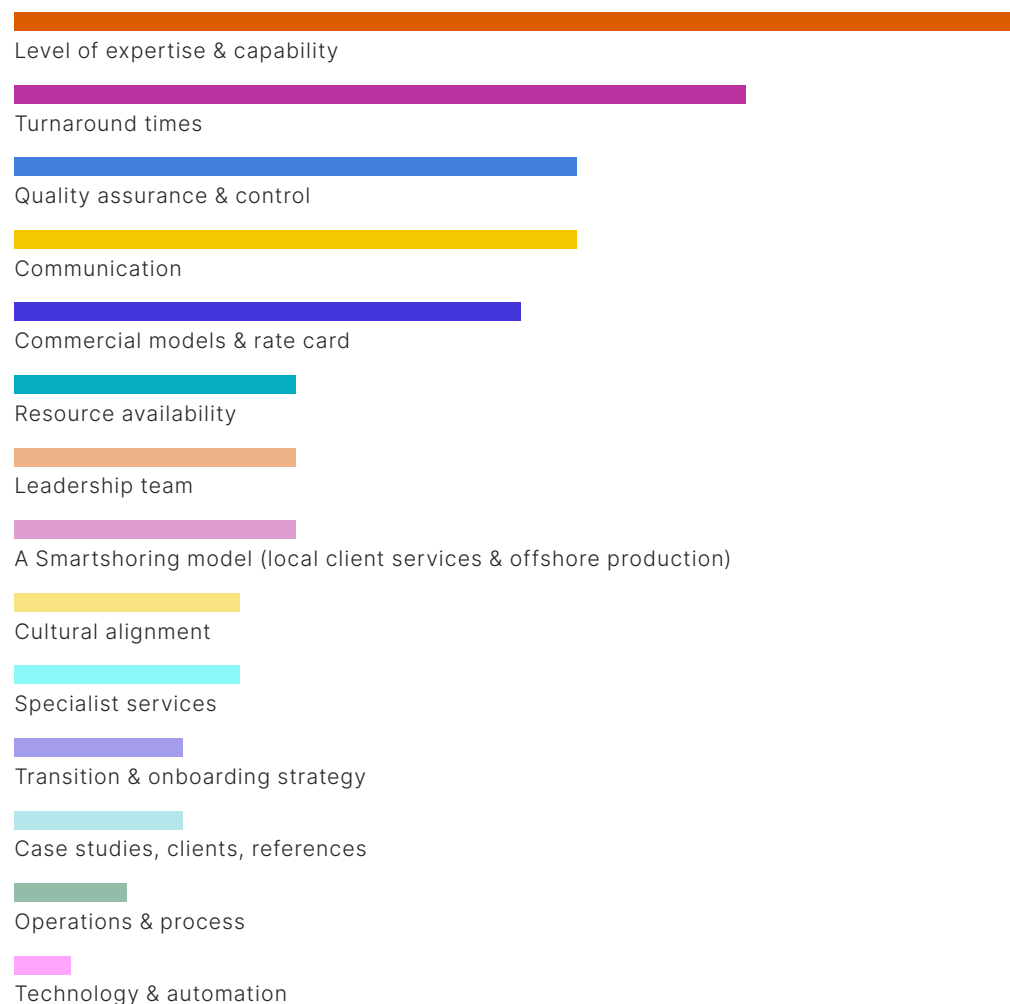
1. Response Times: timely delivery is crucial for maintaining workflow efficiency.

2. Accuracy: high-quality outputs that meet brand standards.

3. Customer Service and Seamless Integration: effective communication and collaboration.

EMMA TURNER, FOUNDER
i-h-a-r
in-house-agency-review
dahling

WHAT ARE THE MOST IMPORTANT ASSESSMENT CRITERIA WHEN SELECTING AN OFFSHORE PARTNER?



Spotlight Interview: Telecommunications & Retail



JAMES MATHERS
HEAD OF OPERATIONS,
IN-HOUSE CREATIVE AGENCY

THREE

What do you see as the three biggest content challenges for your business and team in 2025?

The first challenge, I see, and this is true for a lot of in-house agencies, is the relationship we're looking to build with the wider business functions that enable the agency to operate effectively, especially from a resource perspective.

If resources are stretched and we need to change the shape of the team, or we need to partner with other agencies, we need to ensure we respect the processes in place to set ourselves up for success, as we're not a separate P&L.

The second challenge is effective prioritization. A theme throughout 2024 and moving into 2025 is our workload. Demand is high, which is great, we're definitely not short of work, and our profile internally has built well so we're in a fortunate position. We're very lucky to have really great talent within the team and across all areas, from account management, right through to production.

We do have a big demand for work though, especially as we work on both the UK and Irish markets. So effective prioritization and positioning that back to key stakeholders is an ongoing conversation. Myself and our head of client services work very closely, and we're constantly testing and learning to find the right prioritization approach.

Thirdly, staffing will continue to be a challenge in 2025. We have enough work to employ more, but managing headcount is extremely important. We need to keep the wheels turning and we need to attract the right talent but also work within the process and respect

the procurement framework defined by the business. The industry is moving quickly, so recruitment needs to work at a pace that matches this.

Are your content budgets increasing, decreasing or about the same as last year? If you had extra budget, where would you spend it?

Budgets in 2025 will more than likely stay the same. I don't foresee any increases, potentially a decrease, but this is dependent on the wider business.

We have some people at the moment that we could very easily extend, we could grow the team by 10% quite quickly based on volume, maybe even 20% - we need to consider this when budgeting.

Spotlight Interview: Telecommunications & Retail



JAMES MATHERS
HEAD OF OPERATIONS,
IN-HOUSE CREATIVE AGENCY

THREE

To what extent are you incorporating automation and AI into your content production? Any lessons learned so far?

This question comes up often. AI is quite prevalent. We have tried to get in front of AI and are educating our teams on the possibilities of the use of AI in our business. We have an agency management system that we're currently implementing that has an element of AI, which will help with efficiency, and take away some of the admin that producers and account managers have when costing up projects. But as far as AI for content production we're not using it in day-to-day production.

There's a slight nervousness as it's still early days, personally I don't see a humongous issue as long as they're using it in the right way – for example pumping briefs into ChatGPT; I wouldn't encourage a copywriter to do that.

Using it for idea generation, while the actual creative work is still human, is okay. In terms of automation, we have some suppliers that have used automation for online banners, and some other areas of creative production. There's certainly a use case for it, and we're also exploring this area. The worst thing is when there is a wave of technological advancement, you don't want to be left behind. You need to be on the boat with everyone else, and this includes AI.

What are the macro trends changing how your studio, how will your agency look maybe in two to three years-time?

We have a big production element, but as a conscious effort are pushing for more creative work. The production element won't change any time soon, but we're now working on sponsorship opportunities and pushing for bigger briefs. The landscape will evolve and change over time.

How do you measure success when working with an external partner?

Culture and collaboration are equally important. We have to fully integrate with an external

partner. We'll always send an in-house producer and client services member to the shoot, for example, to ensure we can work collaboratively and be involved creatively and in the edit.

We often bring partners in that have a very different skill set to us, so when on-boarding that partner culture, collaboration and I would also add communication, are the foundations to a strong, successful partnership.

How does your in-house team engage with sustainability?

We don't have a specific sustainability policy within the agency, but of course the wider business has an ongoing sustainability effort and sustainability policy which we align to when we're running shoots. This ensures we always have small, tight teams in order that we're more sustainable as a business.

We do a lot of print production, as part of our retail point of sale, so we work closely with our print suppliers to ensure there's a sustainable supply chain. Sustainability is a very important subject, and if we can make an impact through our working practices, we should.

Q8: What percentage of savings would you expect to make across the following services if using an offshore model?



AI and advanced production models are reshaping spending, driving efficiency and cost reduction.

While the objective has always been to work smarter, the focus now is sharper than ever: delivering impactful results that maximize every pound spent.

EMMA TURNER, FOUNDER
i-h-a-r
in-house-agency-review
dahling

When it comes to budgets, the clear direction of travel as illustrated by this year's 'Spotlight Interviews' is that budgets are set to stay relatively stable this year. In some cases, budgets will tighten with a greater emphasis on delivering commercial value and demonstrating an ROI, while delivering greater volumes of impactful content.

We'll of course come to automation and AI later in the report, but when it comes to resource management, this year's survey indicates that offshore production continues to offer substantial savings across all service lines.

The consolidation of tier 3 and in some cases tier 2 production offshore, ensures businesses are maximizing the economies of scale that offshore production brings. When using pure-play offshore studios, that don't offer any 'western' infrastructure, the offshore commercial savings passed back to a client can be significant, and the value of offshore production can be truly optimized. Large talent and resource pools, fixed costs distributed across multiple clients, consolidated specialist

skills, fast technology adoption, and flexible commercial models all add to the narrative that offshore production models can deliver meaningful commercial savings. However, it's important to add, that commercial savings alone, are not the primary driver for many companies embracing offshore production, but only part of the wider business case, with access to flexible resource models to facilitate shorter lead times continuing to be the number one driver.

Over 1 in every 3 companies (37%) are saving 40-60% with an offshore model. This was the most common 'expected saving'. In some cases savings were as high as 80%, especially for video post-production and web development.

WHAT PERCENTAGE SAVINGS WOULD YOU EXPECT TO MAKE ACROSS THE FOLLOWING SERVICES?



Adaptive Design



Artwork



CGI



Image Services & Retouching



OOH (Print & Digital)



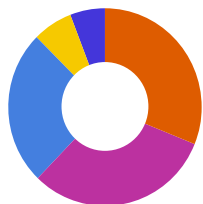
Packaging Artwork



Print Advertising



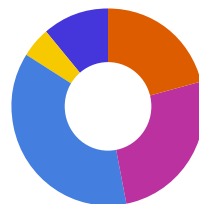
Presentation Services & PowerPoint



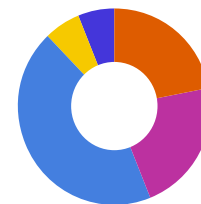
Publications & Reports



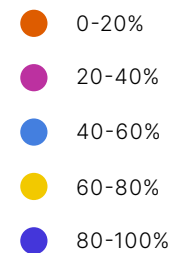
Transcreation & Localization



Video Post-Production



Web & App Development



89%

**expected savings of at least 20%
for retouching**

47%

**expected savings of 40-60%
for CGI**

50%

**expected savings of 40-60%
for transcreation & localization**

27%

**expected savings of 40-60%
for artwork & design**

60%

**expected savings of 20-60% for
presentation services/PowerPoint**

53%

**expected savings of at least 40%
for video post-production**

44%

**expected savings of 40-60%
for packaging artwork**

27%

**expected savings of 40-60%
for artwork & design**



A host of commercial models exist when engaging with offshore production including:

- 1. Transactional pricing:** based on hourly rates for the skills/resource being used. It allows simple commercial comparison, and you pay for the time taken/effort to produce an asset, ensuring high levels of transparency. Companies can scale production up and down as needed without being locked into long-term contracts, with no monthly fixed fee. Resource planning can be more of a challenge, but with the scale of offshore talent pools, this can be mitigated by retaining teams on 'the bench' and using multiple hubs. For higher volumes, many companies should consider a FTE/retained model.
- 2. Unit pricing:** where assets are priced individually, this can include fixed costs per asset and standardized pricing tiers (simple, moderate, complex), again providing high levels of transparency and flexibility, based on asset type and complexity. Unit pricing may not be suitable for highly integrated campaigns where different skills are needed, and a clear understanding on the complexity of an asset and what tier it falls in, should be understood.

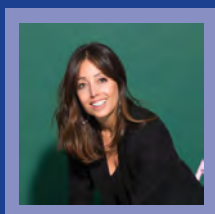
- 3. Retainer/Dedicated Resource, FTE (Full Time Equivalent):** Dedicated resource working exclusively for the client is hired/established, for an agreed number of hours a month. Costs are based on resource time and the level of expertise of that individual. FTEs work continuously on client work, rather than on specific projects, providing availability throughout a month. This model provides cost predictability and often at a lower rate, due to the dedicated nature of the resource. There is a continuous workflow as all costs are agreed up front. Dedicated team members ensure consistency, standardized communication and process familiarity.

- 4. Project-Based Pricing:** is based on a project scope and often includes the number of assets and expected turnaround time. In the case of web development, it would be based on project scope, complexity and time. A clear cost estimate is provided, with defined timelines and milestones.

Any scope creep should be carefully managed and additional pricing provided if relevant. This approach is ideal for short-term, one-off projects where specialist skills are required, or a separate budget has been created.

PRICING MODEL	DESCRIPTION	BEST FOR
Transactional Pricing	Pay per asset or service	Businesses with irregular content needs
Unit Pricing	Fixed price per asset with bulk discounts	Companies producing high-volume assets
Retainer Pricing	Fixed monthly fee for ongoing creative services	Brands with consistent creative needs
Project-Based Pricing	Custom pricing per project	Large-scale, multi-asset creative campaigns

Spotlight Interview: In-House Creative Community



EMMA SEXTON
FOUNDER & PARTNERSHIPS
INSIDE OUT® COMMUNITY

What do you see as the three biggest challenges for in-house teams in 2025?

Firstly, dealing with the ever-increasing opportunities for brand encounters and creating the assets needed to support those interactions.

Secondly, evolving a brand fit for the future where it is impossible to be static and police all the materials being created. Add to that all the other opportunities that now exist for a brand, such as responding to cultural moments, or influencer partnerships for example, where there is no existing brand playbook.

And lastly, being able to move yourself into a position where you can take full advantage of all that technology can bring. In-house creative teams are always in demand by the rest of the business so making space and time to implement new technology or ways of

working is going to be difficult. Being able to be proactive instead of reactive will remain an ongoing challenge.

Do you see budgets increasing, decreasing or staying about the same going into 2025?

Last year our Inside Out® community was really suffering the effects of redundancies and budget cuts, but this year has started with much more optimism and budgets unlocked for hiring and building up those teams again.

With all the recent business stories debating the longer-term impact of businesses who focus too heavily on brand performance rather than brand building. For example, the recent struggle with Nike focusing too much on performance marketing, versus the success McCain's Oven Chips have had with brand building that helped them keep market share while allowing them to increase their prices, has been well documented in the business press. It is proof that lack of investment in brand building has consequences.

Investment in brand building versus performance marketing needs to be an equal balance and budgets will need to be adjusted accordingly, so I am hopeful that this year the

C-Suite will start to understand the value of brand to their business in a way they haven't before.

If in-house teams had extra budget, where would they spend it?

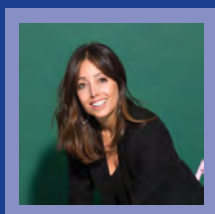
It has to be these top three priorities.

The first being on resources, as I don't know a single in-house creative team who is expected to deliver less this year.

The next would be training. Soft skills are in as much demand as technical expertise, and we have a real industry gap right now in understanding the craft of the execution. Just because you have great talent in your creative team, they will not always have all the right skills and experience for the ever-changing needs of the brand.

Lastly, it would be creative testing. There are so many accessible tools out there, so we no longer need to guess if the creative work is going to land with your audience or cause a catastrophic fall out. The added benefit is that it really helps to manage complex stakeholder feedback too.

Spotlight Interview: In-House Creative Community



EMMA SEXTON
FOUNDER & PARTNERSHIPS

INSIDE OUT® COMMUNITY

To what extent are you seeing teams incorporating automation and AI into their content production and any lessons learned?

A lot of this technology is baked into the tools they are already using rather than being something separate that they are implementing. AI and automation are big topics in their own right so it is difficult to generalize. Whilst AI and automation brings a huge opportunity to the table, it is not always the right thing to do, nor does it always make something better or more efficient.

The hype is over; now it is time to be smart with the tech. When it comes to creative craft the technology is not really there yet. The question that is emerging for me is will the technology ever replace the craft? In-house creative teams are restricted by the existing technology and decisions happening within the business, so they do not have the flexibility that an agency

may have to implement fast changes to systems and processes. But with this comes time to really experiment and play with these new tools outside of the day-to-day by forming their own 'tiger' teams. Sometimes, not being an early adopter can be an advantage. The rate of change for all of these technologies is moving phenomenally quickly. It is not always a bad thing to be a 'laggard' in the adoption, as you get to learn from others' mistakes.

How are in-house production models changing and evolving as we enter 2025?

There has been a growing theme for a while for in-house creative teams to move as much of their 'business as usual' assets away from the team. Many of our Inside Out® community members have a focus this year on finding ways to enable the rest of the business with creative support.

The question they are asking is 'how do we influence everything, but not DO everything'. Technology, AI, Automation and Offshoring all play a role here, and it really is dependent on the assets and the markets you need to reach. I am always reluctant to generalize as the make-up of in-house creative teams varies so widely.

But what is a common focus for all of them is the need to keep creative strategy and thinking in-house, which is a complete 180-degree turn from where in-house teams started decades ago, which was to serve the creative production needs of the business.

Which services do you think are best to offshore and why?

It is fair to assume that an in-house creative team would outsource the low value work such as resizing and versioning, but offshoring is becoming far more sophisticated. Offshoring is now another option for teams who are not able to increase head count and need support with the ebbs and flows in the demands of their team across the year. Offshoring can really power your creative capabilities up at times of need.

How important is sustainability/DEI when selecting an external partner?

We have to remember that in-house creative teams are part of bigger businesses and with that comes the rules and regulations that corporations have to follow including being ESG compliant. As these organizations start to integrate ESG reporting, they will be demanding vendors and suppliers are compliant too.

Q9: How do you measure the success of your offshore content production partner?

Quality, time, expertise, cost and communication are the top five criteria for success, around which your 'measurement and KPI metrics' should focus.

As Alberto Erazo, of Popular Bank states, "when working with an external production partner, the quality of the work is key. It must be outstanding". For those considering or utilizing offshore production, the following are important steps:

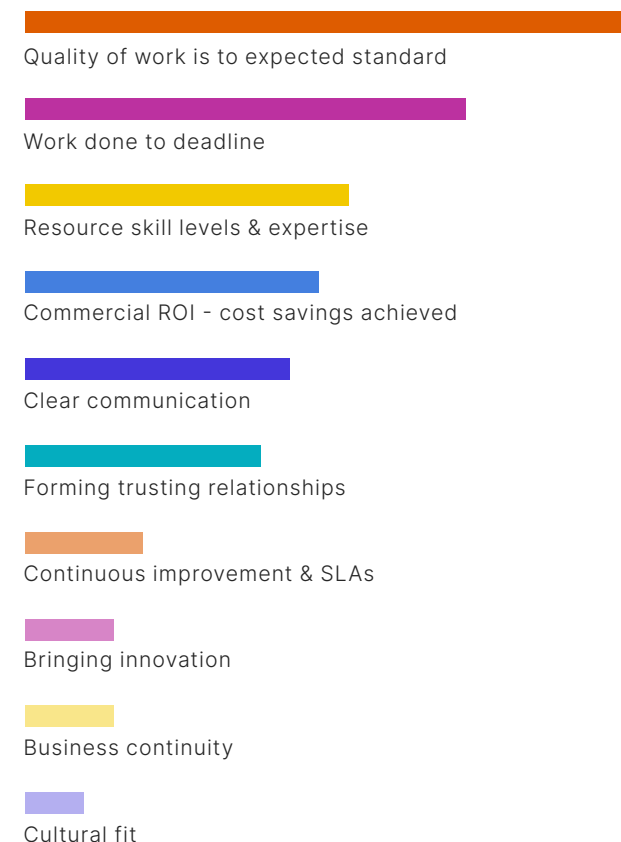
1. Establish clear quality standards during the pilot, in relation to brand guidelines, style guides and file specifications.
2. Implement a structured briefing, review and approval process, using project management software, wherever possible, so an audit trail exists and teams can work towards a standardized process.
3. Utilize quality control check lists and ensure compliance/accessibility.

4. Ensure feedback loops, regular testing and open communication channels are in place, so teams are comfortable discussing any possible misunderstandings.
5. Leverage automation for efficiency and consistency, especially for repetitive tasks. Also reuse and repurpose content wherever possible, by utilizing an effective DAM, for simple search, retrieval and templating.

47%

of responses had 'quality of work is to expected standard' as the number one measurement of success.

HOW DO YOU MEASURE THE SUCCESS OF YOUR OFFSHORE CONTENT PRODUCTION PARTNER?



“

**When working with an external production partner
how do you measure success?**

Culture and collaboration are equally important. We have to fully integrate with an external partner. We'll always send an in-house producer and client services member to the shoot, for example, to ensure we can work collaboratively and be involved creatively and in the edit. We often bring partners in that have a very different skill set to us, so when onboarding that partner culture, collaboration and I would also add communication, are the foundations to a strong, successful partnership.

JAMES MATHERS
HEAD OF OPERATIONS, IN-HOUSE CREATIVE AGENCY
THREE





**When working with an external production partner
how do you measure success?**

First and foremost, the quality of the work is key. It must be outstanding, meeting the brief's requirements and aligning with our brand's aesthetic and messaging. Secondly, the strength of the relationship we cultivate with our partners is crucial. Open communication, mutual respect and a collaborative spirit are fundamental for a productive and enjoyable working dynamic. Lastly, the partnership must make sense from a business perspective. We should see a return on our investment, whether through cost savings, increased efficiency or the ability to scale our content production without compromising quality.

ALBERTO ERAZO
VP, CREATIVE DIRECTOR
POPULAR BANK
(November 2024)

Spotlight Interview: Education - Content Technology & Publishing



JENNIFER RAND
SENIOR DIRECTOR, BRAND
STRATEGY, MARKETING
COMMUNICATIONS & SALES
L&D

What do you see as the three biggest content challenges for your business/team in 2025?

The three biggest content challenges relate to:

1. Generating and allocating budget to produce content
2. Always creating quality content
3. Ensuring brand consistency

Are your content budgets increasing, decreasing or about the same as last year? If you had extra budget, where would you spend it?

Currently, our budgets are decreasing; however, if we had additional budget, I would invest in our website and our social media.

To what extent are you incorporating automation and AI into your content production? Any lessons learned so far?

In relation to the translated content on our global sites, we'll use AI to assist with social media posts/content, email headlines and copy.

Unfortunately, currently, content created by AI cannot be trusted for facts/figures. Imagery generated by AI is getting better, but it isn't usable most of the time. AI is definitely helpful to get the ball rolling, generate ideas or to shorten and revise copy.

Which services would you offshore and why?

I'd use offshore teams for the following:

1. Website content creation and production. We have limited bandwidth to support our multiple channels internally.
2. Social strategy, content creation and production, again, we have limited bandwidth and knowledge to support this area as effectively as it should be.

Outside of the commercial benefits, what are the primary success factors of an offshore model?

I'd say, support from a large team/pool of creative resources that can flex in/out of projects as needed.



The three biggest content challenges relate to:

1. **Generating and allocating budget to produce content**
2. **Always creating quality content**
3. **Ensuring brand consistency**

Q10: Which technology should be provided by your production partner?

The Creative Project Management software market continues to scale rapidly. This is a direct result of a remote hybrid working culture, as businesses and content teams look for platforms with real-time updates, agile project management and fluid communication.

North America dominates the market, with more than half of all software providers coming out of the US.

Composable technologies with MACH architecture are increasingly popular, as organizations look for integration paths with Adobe Creative Cloud, Canva, Figma, Google Workspace and a variety of CRM and DAM platforms.

Many of the Creative Project Management software solutions include the following primary features:

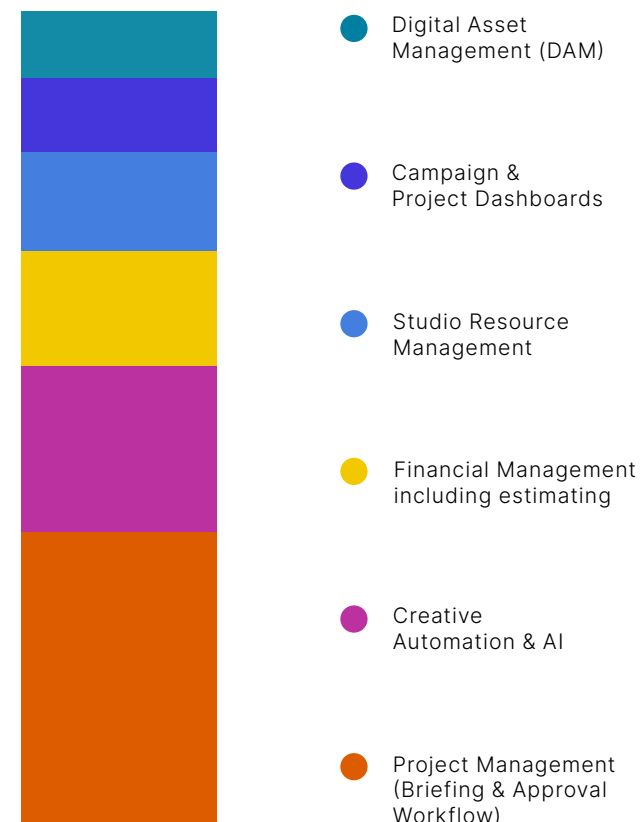
- **Project Management**
- **Briefing Approvals, Digital Workflow Management**

- **Time Tracking**
- **Digital Asset Management**
- **Resource Management**
- **Budget Management**
- **Dashboards & Reporting**

'Project Management software, including briefing and approvals workflow' was selected by 36% of participants, as the technology that should be made available by a production partner.

Followed by 'Creative Automation and AI', with 20% and 'Financial Management and Estimating' with 14%.

WHICH TECHNOLOGY SHOULD BE PROVIDED BY YOUR PRODUCTION PARTNER?



Some of the most widely adopted Creative Project Management software solutions include:

- Adobe Workfront
- Airtable
- Aprimo
- Asana
- Basecamp
- Bynder
- ClickUp
- Encodify
- Hive
- Joule
- Lytho
- Monday.com
- Podio
- ProjectPlace
- Robohead
- Screendragon
- Smartsheet
- Trello
- Workamajig
- Workzone
- Wrike

The successful implementation of these technologies is often owned by Creative Operations. The focus of Creative Operations is to deliver efficient processes,

skilled people and supportive technology within a creative services team. It sits at the intersection of operations, project management, resource management and client services. The creative operations function has enabled Creative Project Management software to be deployed with greater urgency and high levels of adoption. This category of software has now become a must-have technology within the MarTech ecosystem for all content producers.



The global Creative Project Management software market is projected to reach \$19.51 billion by 2031, reflecting a compound annual growth rate of around 14.6%.

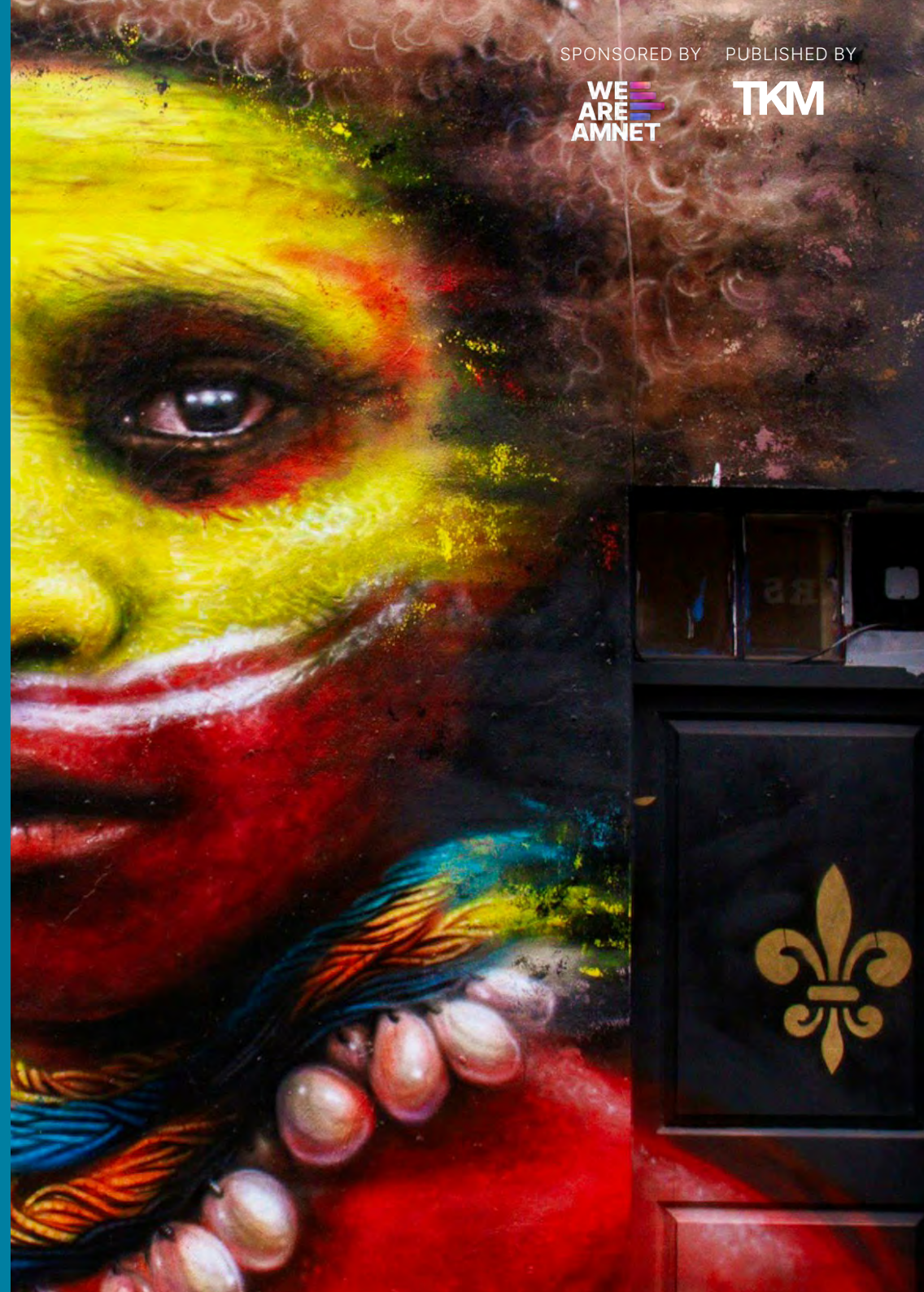
MARKET RESEARCH INTELLECT

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To what extent are you incorporating automation and AI into your content production? Any lessons learned so far?

We are currently using AI and automation, but it's only the tip of the iceberg. It is helping with research and strategic thought gathering, document collation, creative 'resizing', personalization and much more. We want our staff to be strategic thinkers and creative, so we need to continue to streamline our processes to remove all the barriers that stop that. Our learning so far is that you can't learn quick enough. Our issue is having the time to dig deeper and to fully understand what it can do.

MILES JOYCE, COO
THE HALLWAY



Q11: What percentage of your content production is managed through automation?

2025 is undoubtedly the year that creative automation becomes a reality for many in-house and content producers. Creative automation is technology that streamlines the creative production process to produce more impactful digital ads at scale.

When it comes to tier 3 production, the mantra **'automate first, offshore second, hire third'** is more relevant now than ever, as creative automation offers fast and efficient content production at scale, while also delivering greater brand equity, through consistency and cultural relevance.

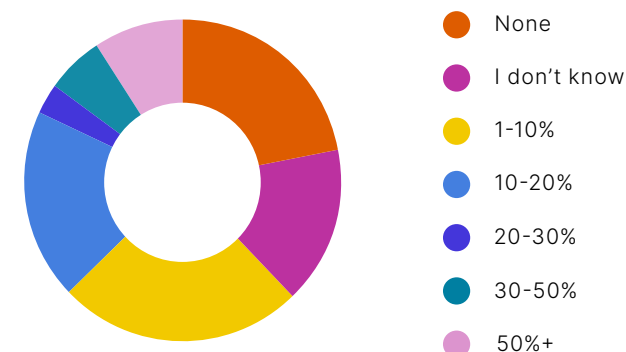
Industry leader, Kelly McConville at Fourthline said in the Drum in 2024:

"Creative automation has allowed me to let my creatives be creative and not just sit there versioning for days...it gives that extra peace of mind that every asset will go out exactly as it should, which is essential for building and maintaining brand value".

44%

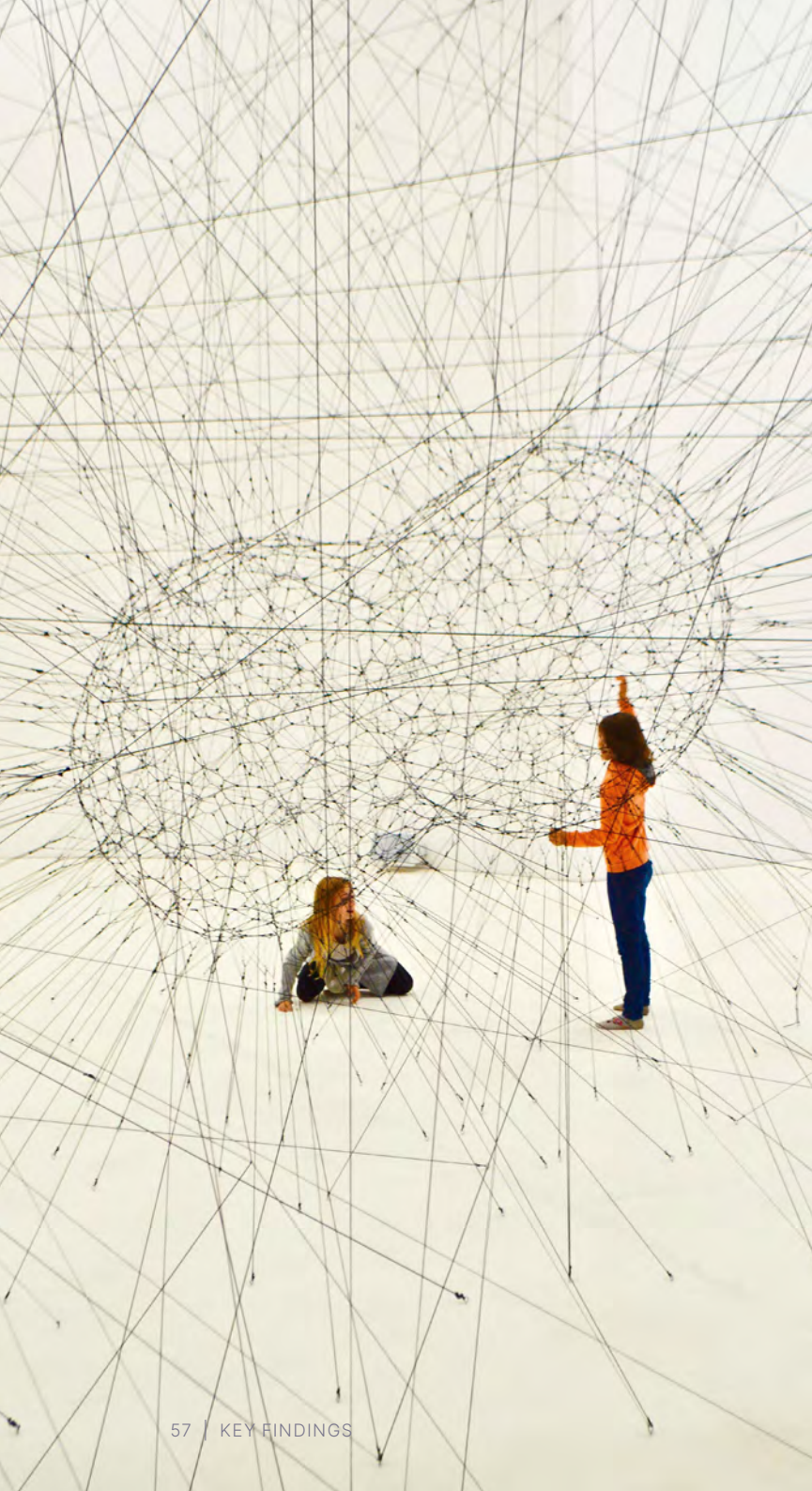
of content producers, are automating up to 20% of their total production output. 22% have not yet started to automate production.

WHAT PERCENTAGE OF YOUR CONTENT PRODUCTION IS MANAGED THROUGH AUTOMATION?



When implementing campaign automation, it's important to:

1. Conduct a content audit to assess the scope and scale of your creative requirements.
2. Assess existing and future campaigns to identify opportunities for automation.
3. Review ways of working and culture, to determine inefficiencies and resistance to change.
4. Move to a template-based approach for your design team.
5. Select a software platform that supports multiple formats, has a strong UX and integration pathway as well as excellent customer support.
6. Start small and pilot, ensure you have budget for training and change management.
7. Monitor, measure performance, optimize and scale-up.



Features that many of the leading creative automation tools offer include:

- Template based design, with dynamic templates for images, video and HTML5 banners
- Standard brand elements (logos, fonts, colors) and customizable content
- AI background removal
- AI dynamic layout and content adaptation (e.g. smart resizing, auto layout adjustment)
- Bulk editing, batch uploading
- Drag and drop design editors
- A digital asset library
- Approval systems
- Integration with ad platforms

Some of the most widely adopted Creative Automation software solutions include:

- Abyssale
- Adacado
- AdCreative.ai
- Artflow
- Bannerflow
- Bynder
- Celtra
- Chilli Publish
- Create Totally
- Creatomate
- Cube
- Hunch
- MadgicX
- Marpipe
- Plainly
- Placid
- ReMake
- Rocketium
- Smartly.io
- Storyteq
- SundaySky



We've incorporated automation and AI into our content production process to boost efficiency and creativity. For project management automations, we rely on Monday.com, which has streamlined our workflow and simplified project and time tracking for our team. As a result, we successfully managed more than 700 projects last year with a relatively small team.

On the creative side, we leverage Figma's auto-layout feature to resize digital assets at scale, drastically accelerating our production speed. Figma's collaborative tools have improved collaboration between our writers and designers, resulting in more cohesive and impactful content.

ALBERTO ERAZO
VP, CREATIVE DIRECTOR
POPULAR BANK
(November 2024)

Spotlight Interview: Creative Operations and In-House



EMMA TURNER
FOUNDER

i-h-a-r
in-house-agency-review
dahling

What do you see as the three biggest challenges for in-house teams in 2025?

For brands exploring or optimizing in-house agencies (IHAs), three critical challenges emerge:

- 1. Ambition & Scope:** Clearly defining the type of work the IHA will handle is crucial. Additionally, brands must assess their current and future agency partnership models to ensure alignment and efficiency.
- 2. Operating Model:** A well-structured and tool-supported operating model is the backbone of success. It fosters seamless integration between marketing and creative teams, ensuring operational fluidity.
- 3. Talent & Partnerships:** Even with the right model and scope, success hinges on

people. It's essential to build internal teams strategically and supplement them with external partners for specialized skill sets or workstreams beyond the IHA's scope.

Establishing a strong foundation ensures IHA's deliver sustainable, best-in-class work while safeguarding against team burnout. Poor planning or an ill-defined scope can erode credibility and limit long-term impact.

At IHAR & Dahling LDN, we collaborate with brands to design tailored IHAs—from building the business case to operationalizing the model and assembling the perfect team for today's needs and tomorrow's ambitions.

Do you see budgets increasing, decreasing, or staying the same going into 2025?

Overall, budgets are tightening, with creative agencies bearing the brunt as brands increasingly invest in in-house solutions. AI and advanced production models are reshaping spending, driving efficiency and cost reduction.

While the objective has always been to work smarter, the focus now is sharper than ever: delivering impactful results that maximize every pound spent.

If in-house teams had extra budget, where would they spend it?

On strategy. Planning is the cornerstone of great creative work, yet it's often underrepresented in IHAs. Many brands rely on insight teams, but strategic planning goes deeper, crafting briefs that unlock creative potential and evaluate work effectively. This role delves into audience, brand and product truths to ensure every campaign addresses business challenges directly. Including strategists, in-house teams would elevate the creative output and align it with business goals.



The lesson is clear: leverage AI and offshore resources for routine work to free up in-house teams for high-value creative tasks.

Spotlight Interview: Creative Operations and In-House



EMMA TURNER
FOUNDER

i-h-a-r
in-house-agency-review
dahling

How are in-house and offshore teams incorporating automation and AI into content production?

Automation and AI have revolutionized content creation, enabling faster, more cost-effective and highly personalized outputs. Offshore solutions, combined with AI, excel in BAU (business-as-usual) tasks, transcreation and repetitive processes.

However, while these tools enhance efficiency, they remain part of the creative toolbox; big ideas still demand human ingenuity.

The lesson is clear: leverage AI and offshore resources for routine work to free up in-house teams for high-value creative tasks.

How are in-house production models evolving as we enter 2025?

Production teams now require a seat at the strategic table. Gone are the days of lengthy shoots with minimal deliverables. Today, content must be channel-specific and multifaceted, addressing diverse touchpoints from social and performance marketing to experiential and retail environments.

Integrated, targeted and agile production models are essential to ensure the right work reaches the right audience at the right time. Advanced systems and tools further optimize resource allocation, minimizing redundant efforts and maximizing impact.

Which services are best suited for offshoring, and what savings can you expect?

Template-driven BAU work is ideal for offshoring. The true value of an IHA lies in driving creative strategy and developing content that defines and differentiates brands. Offshoring and AI not only deliver cost savings but also free up in-house teams to focus on

strategic, high-impact work that resonates deeply with audiences and builds brand love.

When working with external or offshore teams, how do you measure success?

Key performance indicators include:

- **Response Time:** Timely delivery is crucial for maintaining workflow efficiency.
- **Accuracy:** High-quality outputs that meet brand standards.
- **Customer Service and Seamless Integration:** Effective communication and collaboration.

How important are sustainability and DEI when selecting an external partner?

Sustainability and DEI are no longer optional; they're fundamental. It's essential to align with partners who share your brand's values and aspirations. Building long-term relationships with purpose-driven partners ensures mutual growth and reinforces your brand's commitment to doing business responsibly.

Q12: What are the top advantages of automation?

The advantages of automation are clear and diverse. All options provided in this year's survey, received some share of the vote. Speed of turnaround ranked highest with 53%, followed by agility, quality/reduction in errors, volume production and reduced cost (ROI).

When deploying creative automation key metrics should be established in relation to the benefits:

- 1. Speed of production;** what is the reduction in turnaround time of asset creation, including the setting up of the templates.
- 2. Cost efficiency;** to what extent does the time saving and redundant manual work result in cost savings.
- 3. Scalability;** with existing resource and budget, how many more campaigns can be localized, and how many more markets can be addressed.

- 4. Brand consistency;** right first time and on-brand measurements.
- 5. Data-driven insights;** how can content be further optimized to monitor performance and potential.

'Speed' with 53% of votes was considered the single biggest advantage of automation.

This was closely followed by 'agility' with 47%, 'increased quality control' and 'repurposing of content', both with 40%.

WHAT ARE THE TOP ADVANTAGES OF AUTOMATION?



Q13: What is the primary obstacle for effective utilization of automation?

It is imperative that organizations looking to bring in creative automation, ensure there is a **cultural transformation aligned to the emerging technology**. This responsibility resides with the leadership team, and will help maximize the ROI potential of the technology, irrespective of the final objective, be it increased speed, more agility or greater volume.

A culture of adaptability, curiosity, upskilling, reskilling and internal training is paramount and needs to be communicated and reinforced continuously.

Companies that have anchored their culture around innovation include:

GOOGLE: THE INNOVATION MINDSET

At Google, employees are encouraged to explore unconventional ideas, encourage creativity and risk-taking, that can lead to 10x improvements.

Google strives for continual innovation, not instant perfection. Think big, but start small.

SALESFORCE: COMMITTED TO INNOVATION

Employees share responsibility for innovation, invest in innovation regardless of the economic climate and embrace the ongoing evolution of innovation.

AMAZON: THE DAY ONE MINDSET

A culture and operating model that prioritizes customers, innovation and agility. It's based on the idea that everyday Amazon should be treated like the first day of the company, as if it was a start-up.

The single biggest challenge for any studio adopting automation is a change in culture. 39% stated this was the single biggest factor. Ongoing limitations around what can be automated, was second, with 19% of the vote.

WHAT IS THE PRIMARY OBSTACLE FOR EFFECTIVE UTILIZATION OF AUTOMATION?

A change in internal culture



Limitations of what can be automated



A change in production software traditionally used



Volume commitment to deliver an effective ROI



A change in the production model



Spotlight Interview: Technologist, MarTech, Automation, AI Specialist



GARETH CHILTON
FOUNDER

MANMACHINE

As well as 2025, we also interviewed Gareth for the 2024 Benchmark Report, as we were keen to explore how the market has matured over the last 12 months in terms of automation and AI.

What are the key changes in content automation adoption over the past 12 months?

From an organizational perspective more of the customers we interact with are leaning into automation, not only for content but also workflow automation. Organizations investing in content generation and automation have experienced notable transformations which only buoy their confidence, including:

- **Enhanced Efficiency & Productivity** by streamlining content workflows, recurring manual tasks and accelerating production timelines.
- **Scalability & Personalization** enabled by the rapid generation of personalized content at scale to meet diverse audience needs and improved engagement.
- **Cost Reductions** brought about by minimizing labor and optimizing resource allocation delivering significant cost savings.
- **Improved Compliance and Consistency** supported by automated processes that adhere to brand guidelines and regulatory standards.

Lastly, AI is becoming more pervasive, and more and more teams are using this to generate content at scale across multiple formats such as video, imagery and text - albeit at differing levels of maturity.

Why have some companies moved quicker than others?

There are a number of reasons that organizations are at different levels of maturity across the journey based on a host of factors.

The primary reason we see is always a limited insight into the benefits and solutions available; however, this is just the first part (and often led by the gap in knowledge in executive leadership).

This is closely followed by the ability of organizations to be agile and have a culture of adaptability to evolve and support the technologies being touted.

Coupled with resource availability, technology infrastructure strategy and lastly, but by no means least, the lack of understanding of the levels of investment required make it a complex eco-system to navigate.

Spotlight Interview: Technologist, MarTech, Automation, AI Specialist



GARETH CHILTON
FOUNDER

MANMACHINE

How has the Technology evolved and the ability to adopt this?

The relentless growth of functionality has not slowed over the past 12 months, however, this has expanded to encompass a broader set of tooling than just pure play automation platforms, as well as a broader move across MarTech into micro integrations.

Seamless workflow automation for distributed teams is growing with platforms like Wrike, Aprimo, and Workfront being enhanced to bridge the gap. These tools now provide automated task delegation, capacity forecasting, and milestone tracking tailored for global operations. Tools have become more user friendly, and have a large list of integrations into existing stack components such as DAM and CRM. This has led to an improvement in adoption, while MarTech

efficacy in organizations still hovers around the 40% mark. Generative AI capabilities such as automated versioning, dynamic ad templates and video and content localization have advanced significantly, with teams relying on these more for tier 2 and tier 3 work.

MarTech tooling in creative operations has also evolved, with additional features and interoperability allowing it to integrate more tightly with creative automation tools.

DAM tools such as Bynder and Brandfolder now sync directly with product management and production pipelines, automating assets usage and reporting. Platforms like Celtra, Chili, and Sesimi continue to add connectivity options to support large scale template-based automation.

While the uptake of tooling is improving, there is a proviso that this is split into forced maturity and adoption. Most organizations are on the forced maturity track, where the demand from their organizations and brand teams is driving this, making it reactive. On the other hand, teams that are aligned to a bold strategic vision aligned to company strategy are seeing great adoption and, in turn, they are extracting the results mentioned by taking a proactive stance.

Where is the investment, where has it gone or is going to, and who owns it?

Investment in MarTech for Creative Operations has been dynamic, reflecting shifts in organizational priorities and technological advancements. MarTech spend has dropped by around 2% from 2023 to 2024.

The CMO or senior marketing leaders still oversee the MarTech budget, especially concerning tools that directly impact creative operations. However, there is also a diminishing influence over MarTech, as other enterprise leadership such as IT take more control.

There has been a significant focus on AI-Driven Tools in the past 12 months, with 77% of the 3,000 new MarTech tools introduced in 2024 being AI-centric, particularly those focused on content-related tasks.

Overall, projected growth in the sector is still strong, with spending expected to surpass \$215 billion annually by 2027. This highlights the sheer demand for operational efficiencies driven by technology in the space.

Spotlight Interview: Technologist, MarTech, Automation, AI Specialist



GARETH CHILTON
FOUNDER

MANMACHINE

Who is responsible for the budget (and what's the impact)?

To start, there are a lot of organizations who do not even have ring-fenced budget dedicated to Marketing Technology, as this is still treated as IT and procured and managed in this way.

For more mature organizations, budgetary responsibility sits with the senior leadership team and primarily the CMO, but this brings some complexity as the spending is done based on a strategic vision and not an operational understanding of requirements. This means tooling that may not be fit for purpose is procured as the underlying problem to be solved at an operational level is not well understood.

Where a more segmented budgetary responsibility is seen, this brings additional challenges. While it puts the power of choice in

the hands of the user, implementation team, or operational lead, it's generally done in isolation from a broader MarTech strategy. This means there is often duplication of functionality across multiple toolsets and limited ability to leverage suppliers at scale both on price and on influence over feature set.

That being said, we are also seeing IT evolving and leaning into this space more and more, as technology in larger organizations is still funded centrally from an IT perspective. This brings its own complexities and unique challenges, mostly born from limited knowledge and the fact that IT is generally responsible for workplace technology not operational tools.

Overall budgetary ownership is still divided, and this presents a challenge for marketers and creative operations resources alike – and we don't anticipate this changing anytime soon.

Are the same failure points still present from a year ago?

Beyond the exponential uptake and growth both in the number of vendors and in consumer adoption, we are still seeing the same principal problems cropping up:

- Limited knowledge of Marketing Technology and its operational integration hindering organization's ability to leverage the tools procured to extract maximum value.
- Fragmented strategies causing duplication of tools and an inability to build a lean and efficient technology stack that delivers outside results.
- AI has still not reached its grail moment with the hype starting to get tired.
- Budgets are still on the decline with the expectation that resources should be able to do more with less because the 'tech' will solve the problem.
- Lack of understanding that technology is no longer a tool but a fundamental part of your operating model. When making changes to your MarTech, invariably changes to your operating model should follow swiftly for success.
- It's not the technology, it's you. There is still this overwhelming belief that the technology will solve underlying strategic and operational problems with no investment both tactical and strategic to support this.

Q14: What would you expect to be automated/partially automated by your production partner?



We use both Storyteq and Bannerflow currently, for automation. AI and automation is a huge focus for next year, as it probably is for most in-house creative teams, but the volume of content we produce, we need to ensure we can produce content efficiently.

Some of the challenges we've had to address include the level of human/manual input required, which often negates the automated element, and can reduce the levels of efficiency, but still, these tools help hugely to enable content at scale.

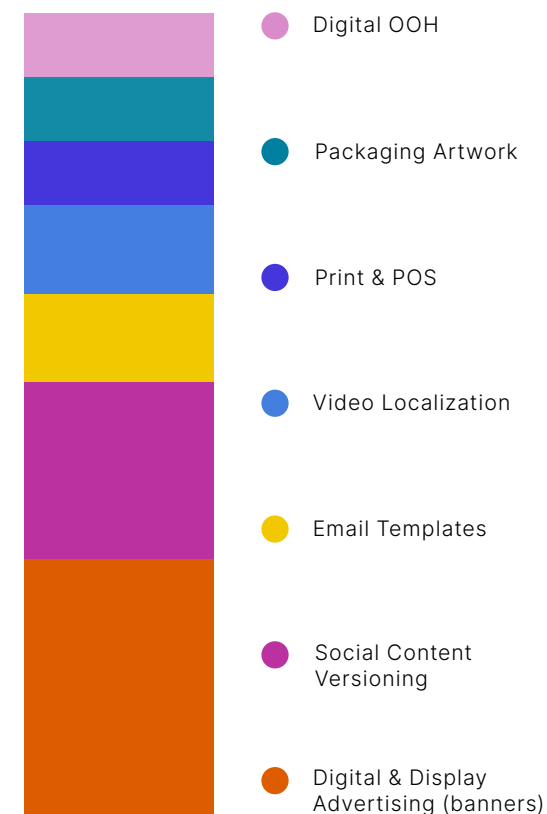
JULIA RODINO HIGGINS
HEAD OF ACCOUNT MANAGEMENT, ENTAIN

Digital, social and video content, are all candidates for high levels of automation, from re-versioning to reformatting, with ads often produced with an estimated impact of:

- Speed; an 80% faster turnaround
- Cost savings; 50-70%
- Scalability of 10x asset creation for the same budget
- Consistency; should be aiming for 100% compliance
- Personalization performance metrics should increase by 30% with more engagement

Digital Banners (32%) is the number one asset that content producers expect to be automated, followed by Social Content Versioning (22%) and Video Localization (11%).

WHAT WOULD YOU EXPECT TO BE AUTOMATED/PARTIALLY AUTOMATED BY YOUR PRODUCTION PARTNER?



Q15: Do you have an AI strategy for content production?

It's no surprise that AI remains at the forefront of the agenda, but given the speed of evolution and the amount of disruption we're seeing in marketing and content teams across all businesses, the number of organizations lacking an AI strategy is considerable.

The reasons cited in the survey for a lack of strategy included:

1. A lack of expertise and knowledge within the leadership team.
2. Concerns around regulatory and legal risk preventing adoption at scale.
3. Culturally behind the curve when it comes to technology.
4. Dedicated resource and team bandwidth to explore potential solutions.
5. Not a priority for the existing business model.
6. The tech is moving faster than our ability to strategically plan.

1 out of every 2 companies, doesn't currently have an AI strategy for content production.

Some experts believe that by 2026, up to 90% of online content could be AI generated, with humans initiating the prompts. At the end of last year, ChatGPT held 59% of 'Generative AI Chatbot' market share, with Microsoft Copilot on 14%, Google Gemini on 13%, Perplexity on 6% and Claude AI on 3% (Ref firstpagesage.com)

In Meltwater's recent 'Marketing Trends to Watch in 2025' guide, they state 'AI generated content is also cluttering search results, with estimates indicating around 14 percent of Google's top 20 results now contain AI generated content'. Unique insights, subjective points of view, human creativity, human relatable experience and emotional intelligence will ensure content can stand out and be more authentic.

DO YOU HAVE AN AI STRATEGY FOR CONTENT PRODUCTION?



● No ● Yes ● Don't know

The Generative AI market is projected to reach US\$62.72bn in 2025.

The market size is expected to show an annual growth rate (CAGR 2025-2030) of 41.53%, resulting in a market volume of US\$356.10bn by 2030.

STATISTA

The lack of AI adoption in many organizations is also compounded by organizational culture, and the readiness to embrace AI. In a recent Gallup 'Culture of AI Benchmark Report', they stated 'Creating a safe environment for experimentation is also crucial for successful AI deployment.'

Despite discussions about 'failing fast,' only 1 in 10 leaders felt their organizations truly foster such an environment where people can try, fail, and learn from mistakes. An additional major challenge cited in Gallup's report, is the digital capability gap around AI strategy and adoption, particularly among leadership.

One-quarter of executives noted that a lack of understanding at the senior level hinders progress, with 6 in 10 reporting insufficient digital skills among their senior teams.

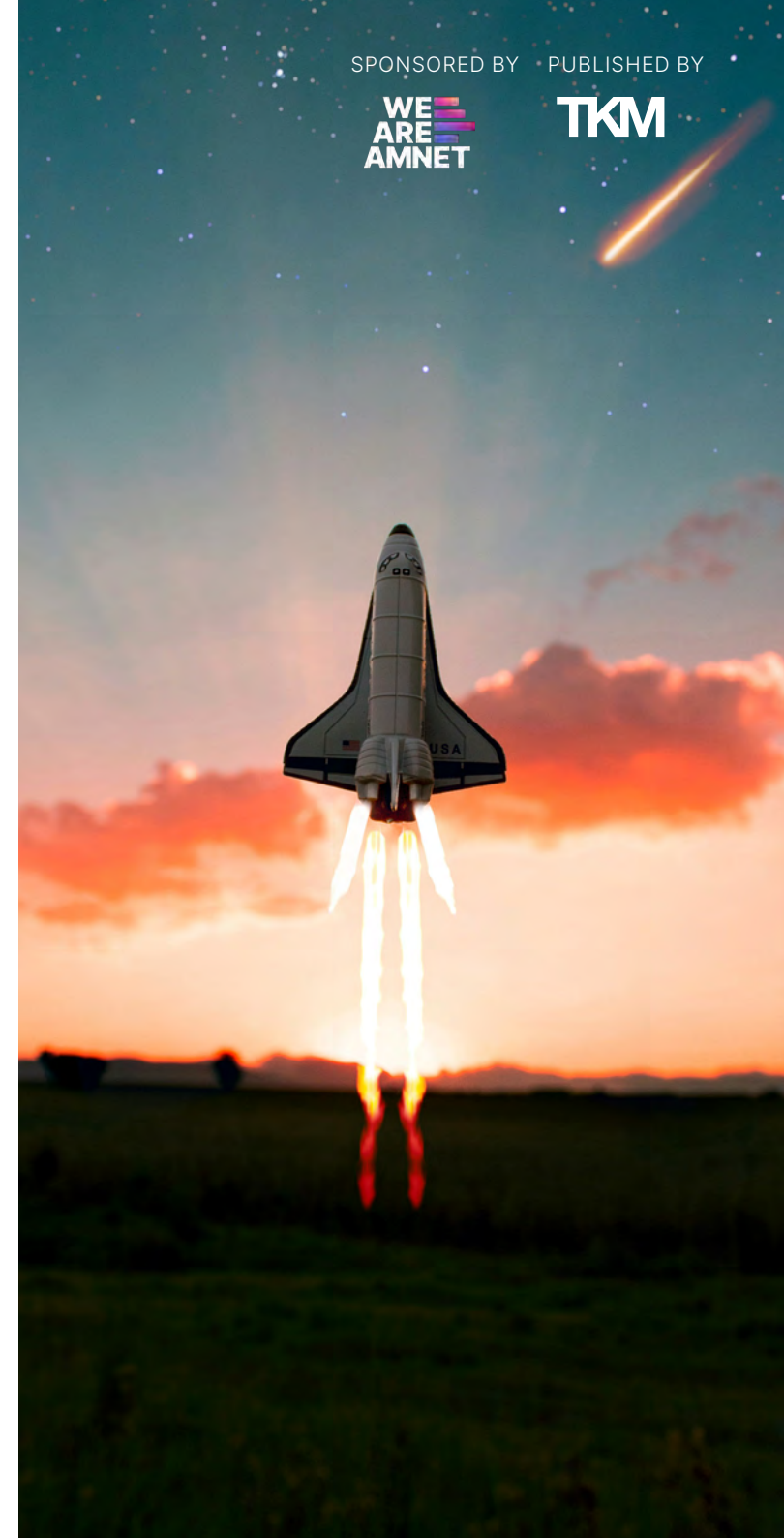
This issue is even more pronounced among frontline managers, where 8 in 10 leaders believe their capabilities are lacking.



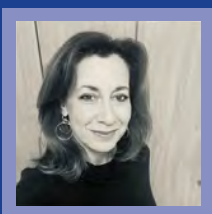
We're currently in the exploratory phase of integrating AI and automation into our workflow. While AI is undoubtedly a hot topic, we're approaching it with a measured and strategic mindset, given our induct.

As we continue to explore the potential of AI and automation, we're committed to a responsible and ethical approach that prioritizes data privacy, security, and the quality of our content. We believe that by carefully considering these factors, we can leverage AI to enhance our capabilities and drive business growth.

LEEANNE BRIERLEY
OPERATIONS DIRECTOR, CREATIVE
ASHFIELD MEDCOMMS, AN INIZIO COMPANY



Spotlight Interview: Sports Betting & Gaming



JULIA RODINO HIGGINS
HEAD OF ACCOUNT
MANAGEMENT

ENTAIN CREATIVE

What do you see as the three biggest content challenges for your business/team in 2025?

For an organization like ours, the three big challenges are:

1. **Speed of delivery;** the pace of content production is increasing, and we need to respond to this requirement.
2. **Managing high volumes;** consumer demand and content consumption is continually driving content volumes. This shows no signs of slowing.
3. **Resource management;** as with all in-house teams, we need to respond to

changing demands and ensure we have the right resources, skills and expertise in place. This requires a level of flexibility and agility when it comes to effective resource management and capacity planning.

To what extent are you incorporating automation and AI into your content production? Any lessons learned so far?

We use both Storyteq and Bannerflow currently, for automation. AI and automation is a huge focus for next year, as it probably is for most in-house creative teams, but the volume of content we produce, we need to ensure we can produce content efficiently.

Some of the challenges we've had to address include the level of human/manual input required, which often negates the automated element and can reduce the levels of efficiency, but still, these tools help hugely to enable content at scale.

Which production models do you utilize within your business? Is it primarily an in-house team?

We primarily in-house with some Tier 1 (TVCS/strategy) handled externally by agencies.

Do you offshore any production?

Whilst we don't currently offshore, we are always looking at production solutions that would complement our large content volumes and the increasing demands around speed of production.

What savings would you expect from offshore production? Outside of the commercial benefits, what are the primary drivers of an offshore/Smartshoring model?

The primary driver would be the cost-savings, but this would need to be balanced with quality output, which is non-negotiable.

Q16: What are your biggest concerns and challenges around the use of AI by your production partner?

2024 saw the introduction of the Artificial Intelligence Act in the European Union, which will take effect in 2025. This legislative framework is aimed at regulating the development, deployment and use of artificial intelligence systems within the EU. It is considered the world's most comprehensive effort to create legal standards for AI technologies, ensuring they are safe, ethical and aligned with fundamental rights, including privacy, non-discrimination and fairness.

The US doesn't have an equivalent act, and has adopted a more decentralized approach, with specific guidelines introduced with State-level initiatives and sector specific regulations to foster innovation. The 2023 Executive Order outlines the administrations policy goals for AI, emphasizing competition and consumer protection.

The thriving **creator economy**, fueled by AI, also poses a further risk to misinformation,

copyright infringement, and ethical/bias risk associated with AI.

AI is empowering a new wave of creators and influencer marketing, disrupting and reshaping the content/consumer relationship, but with regulation at such an early stage brands are navigating the complexity of AI generated content with caution, as the process of exploration, training and upskilling gathers pace.

The top 3 biggest concerns around the use of AI for creative production were:

1. Originality of creative work
2. Quality of creative work
3. Intellectual Property safety and concerns

WHAT ARE YOUR BIGGEST CONCERNS AND CHALLENGES AROUND THE USE OF AI BY YOUR PRODUCTION PARTNER?



Q17: Where are you most comfortable using AI?



In relation to the translated content on our global sites, we'll use AI to assist with social media posts/content, email headlines and copy.

Unfortunately, currently, content created by AI cannot be trusted for facts/figures. Imagery generated by AI is getting better, but it isn't usable most of the time. AI is definitely helpful to get the ball rolling, generate ideas or to shorten and revise copy.

JENNIFER RAND, SENIOR DIRECTOR,
BRAND STRATEGY, MARKETING
COMMUNICATIONS & SALES L&D, CENGAGE

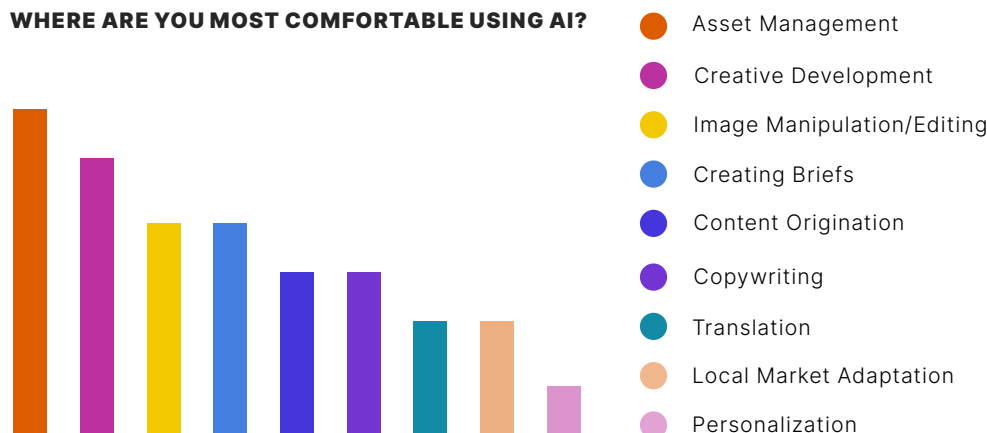
Teams are most comfortable using AI within the more operational processes, with Digital Asset Management and Image Manipulation both scoring highly. However, the more creative processes including creative development, copywriting and content origination are starting to emerge as AI based tools are embraced as part of the creative process with trust, familiarity and skills starting to build.

AI can significantly enhance Digital Asset Management, through AI powered tagging, metadata generation, natural language processing, context aware results, semantic

search, predictive analytics and licensing. AI is undoubtedly propelling the value of a DAM and is enhancing the commercial ROI that a brand can now derive from its DAM implementation.

For creative development and content origination, Generative AI is pushing the market forward at real pace and, according to Bloomberg, the market will be valued at over a trillion dollars by 2032. OpenAI, Microsoft, Meta Platforms and Nvidia are recognized as significant contributors to the generative AI landscape.

WHERE ARE YOU MOST COMFORTABLE USING AI?



17% of responses had Creative Development as the service they were most comfortable using AI for today.

Some of the most common solutions used by content teams include:

IMAGE GENERATION

- MidJourney
- DALL-E
- Adobe Firefly
- Stable Diffusion
- Runway ML

COPY GENERATION

- ChatGPT
- Gemini
- Grammarly
- Copilot
- Claude
- Copi.AI

EXTENDED REALITY & VFX

- Unreal Engine
- Unity
- Godot
- CryEngine
- Nuke
- Maya

TEXT-TO-VIDEO

- Synthesia
- Runway
- Pictory
- Sora
- Veo2.ai
- Canva

IMAGE EDITING

- Adobe firefly
- Canva
- Pixlr
- Luminar Neo
- Topaz

Spotlight Interview: Full Service Agency



MILES JOYCE
COO

THE HALLWAY

What do you see as the three biggest content challenges for your business/team in 2025?

Our biggest 3 challenges this year are not that different from last year or the year before that.

Making money: Clients are wanting more for less. What I mean by that is they are demanding more tangible outputs with less people running around managing that output. In a world of 1-on-1 communication, we need to automate personalization at real scale in a cost-effective manner. We need to bring our costs down and utilize offshore more, and we need to invest in automation both for us internally and also for our clients.

Growing: Budgets are being even further fragmented, as we see lots of new agencies enter the market. Never in my 30 years of working in agencies have I seen so many

newcomers entering the market. The cost of entry, and the cost of exit, are virtually zero making it easy for people to venture out on their own. In the old days of needing an office and infrastructure have completely gone, so we need to find a way to reduce our fixed overheads to compete.

Doing great work: Talent is always on our list. We need to double down on attracting and retaining great talent.



Great people do great work, which attracts great clients, which attract great people who do great work, which attracts great clients... and the circle continues.

Are your content budgets increasing, decreasing or about the same as last year?

We're generally seeing that client overall budgets are remaining the same, but they are needing to do a lot more with the same budget.

This has a downward effect on our ability to service that client and therefore make a profit. So, while their budgets are remaining stable, our revenue from existing business is becoming harder to maintain.

Clients are very open to splitting parts of the budget out to different specialists (which is not a new thing), which again has the downward effect on the ability to profitably service that business.

If you had additional internal budget, where would you spend it?

I would invest it in people and software for proactive learning & training in AI. This is the most critical area for agencies to understand and implement correctly.

Spotlight Interview: Full Service Agency



MILES JOYCE
COO

THE HALLWAY

To what extent are you incorporating automation and AI into your content production? Any lessons learned so far?

We are currently using AI and automation, but it's only the tip of the iceberg. It is helping with research and strategic thought gathering, document collation, creative 'resizing', personalization and much more. It's also helping shape our internal systems and processes. We want our staff to be strategic thinkers and creative, so we need to continue to streamline our processes to remove all the barriers that stop that.

Our learning so far is that you can't learn quickly enough. We run Gemini across our Google Workspace, which is like having an endless team of junior account managers doing the basics for you. Our issue is having the time to dig deeper and to fully understand what it can do.

Which services do you mostly offshore and why?

We currently offshore the lower funnel, but we are seeing that move to a greater part of the production process. This has been driven mainly by clients, as they don't really understand 'offshore' and sometimes require local production.

We're seeing a change away from that stance, as clients understand that their budgets need to work harder and the stigma around offshoring is definitely shifting. It's also always a challenge to change the status quo, so we often find ourselves just doing the 'same as last time'.

Outside of the commercial benefits, what are the primary success factors of an offshore/Smartshoring model?

The ability to scale immediately. We often get clients who need things straight away, so to have the access to extend production hours really helps. To also have access to cost effective resources for internal prototypes and proactive production ideas for clients or pitch work is a game changer.

If an agency was considering moving to an offshore/Smartshoring model, what advice would you give them?

You need to fully commit to a plan and have the most senior person you can in charge of that plan. There is no doubt that the initial move will have its pain points. Doing things how they've always been done is an easy default position. You'll find that people will look for the issues and the differences.

You need people to work through any teething issues, as with any change comes discomfort. What you do not need is the CEO questioning the process and undermining the plan.

I'd also suggest talking to existing reference clients to fully understand the benefits and some of the pitfalls. It will not be a seamless transition, so be prepared to play a longer game.

Treat offshore as just another 'department', not an offshore team.

Q18: Do you assess your offshore partner on their sustainability measures and goals?

Which areas of sustainability are most important?

Social sustainability, environmental practices and economic sustainability were considered the most important areas to assess in relation to sustainability.

Social Sustainability would include:

- Inclusive hiring practices
- DEI in leadership
- Workforce diversity
- Pay equity
- Education and skills development
- Promote physical and mental well being

Environmental Sustainability would include:

- Carbon footprint
- Energy efficiency
- Waste management
- Eco-friendly practices

Economic Sustainability would include:

- Efficient resource use
- Fostering long-term economic growth
- Social equity
- Environmental responsibility

Costa Rica is a true front-runner when it comes to creating a more sustainable future and ranks highly in sustainability.

It enjoys approximately 6% of the world's biodiversity, is 98% deforestation-free, produces all its electricity from renewables and has committed to net zero emissions by 2050.

WHICH AREAS OF SUSTAINABILITY DO YOU RANK AS MOST IMPORTANT WHEN ASSESSING A PRODUCTION PARTNER?





More and more of our member companies have sustainability practices that include environmental, social, and economic concerns. I would imagine that extends to sourcing. IHAs are certainly mindful of the importance of sustainability and are often tapped to develop the narrative to promote ethical, responsible corporate practices.

EMILY FOSTER
DIRECTOR, IHAF
IN-HOUSE AGENCY FORUM

Sustainability and DEI are no longer optional—they're fundamental. It's essential to align with partners who share your brand's values and aspirations. Building long-term relationships with purpose-driven partners ensures mutual growth and reinforces your brand's commitment to doing business responsibly.

EMMA TURNER, FOUNDER
i-h-a-r
in-house-agency-review
dahling





Conclusion

As in-house teams mature and evolve into full-service agencies, **people and talent strategies** remains the greatest challenge and the first area any additional investment is allocated. The ambition of in-house teams, alongside changing priorities, new skills (including strategy, planning and ideation) and market complexity means the in-house teams are having to redefine their relationships and value with key marketing stakeholders. Coupled with the ever-present growth of production, with up to 60% of production spend typically allocated in-house, the reliance on offshore production and automation is becoming a strategic imperative.

By the end of 2025, **automation should be omnipresent**, as the technology becomes more sophisticated, and workflows evolve to embrace automation platforms. **Almost 1 in 2 content creators are automating up to 20% of their total production output.**

In turn, Generative AI and AI to drive operational efficiency, is moving from exploration to implementation. However, the need to build an effective strategy, address ongoing cultural resistance and tackle the growing skill gaps, is paramount. In fact, our survey shows 1 in every 2 companies doesn't have an AI strategy for content production; this is an area that requires swift resolution as investment levels increase. It's also imperative we don't overestimate marketing and in-house team's **AI readiness** for asset production and avoid blindly copying competitors AI strategy or chasing shiny new technologies. With **AI strategies still in their infancy**, businesses face concerns around **originality, quality, and intellectual property**, reinforcing the need for a more structured approach.

Offshore production is playing a crucial and growing role in content production, offering

both flexible resource models and **cost savings of up to 60%**. Low-cost production hubs, are enabling faster turnaround times, especially for localization, with **45% of participants ranking digital banner production and social content localization** as the services most suited to being managed offshore.

Finally, **social sustainability**, focused on equity, inclusion, and well-being, is emerging as a priority when selecting production partners, signaling a shift towards more responsible business practices.

To succeed in 2025, in-house teams must find the right balance between **talent and technology**, embrace **cultural transformation with a focus on automation**, and integrate **sustainable, efficient, and agile production models, including offshore production** to stay ahead in an increasingly competitive landscape.

About Us



We Are Amnet is a **global leader in creative production**.

We Are Amnet deliver unmatched expertise in omni-channel content production and post-production.

We Are Amnet are **pioneers in Smartshoring®**; a hybrid model of global production hubs and regional client services teams to ensure quality, communication, culture, and cost are all on point. Smartshoring® has become essential for marketing teams, in-house teams, and agencies to produce content at scale, while delivering unparalleled quality at speed.

www.weareamnet.com



TKM is a **growth consultancy**.

Specializing in growth strategy anchored in marketing excellence, efficiency, and effectiveness. We advise, select, and implement the right marketing strategy, creative operating model, creative innovation, AI, acquisition strategy and MarTech to deliver revenue and growth targets.

We enrich this process by capturing market leading B2B insight and provide a platform for thought leadership.

www.tkm-consultants.com



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TKM CONSULTANTS,
BOARD ADVISOR & NED

Anil supports businesses with the right marketing strategy, positioning and production models. He advises clients on how best to achieve their growth targets by applying the latest creative innovation, AI, automation and offshore/nearshore models.

He is a regular speaker at industry events, providing insight around the changing landscape and the latest trends affecting both the modern marketer and in-house agencies.

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