



A CMI MARKET GUIDE

The Rise of Digital Brand Compliance

By: Robert Rose – Chief Strategy Advisor, Content Marketing Institute

The growing need for solutions that orchestrate and automate the complexities of legal, licensing, compliance, and aspects of brand quality for rich media across a multi-channel digital ecosystem.



Why This Market Guide: Key Findings

In today’s modern marketing and brand management strategies, business leaders across every industry are charged with creating and managing an exponentially growing number of digital media assets.

This responsibility is more complex than ever because these assets must be created and managed with a consistent, differentiated voice along a thoroughly fragmented spectrum of media types and channels. Further, they must comply with increasingly complex legal, usage, licensing, and even individually customized brand standards.

Creating, managing, activating, and retiring digital media assets to maximize their value for marketing and customer experience is a complex and growing challenge.

This new CMI Market Guide defines, sizes, and provides recommendations around a newly formed market need called *Digital Brand Compliance*. It is a market we project to grow at a CAGR of 18% over the next five years and is an ever more critical component of a modern content management strategy for product and services companies.

“It is a market we project to grow at a CAGR of 18% over the next five years...”



Key Findings:

- ▶ **Digital media is pervasive and continues to grow.** Managing digital content now encompasses everything communicated by brands to their audiences. Digital content operations have become a core, strategic function, including holistic ways to manage access rights, licensing, and digital asset compliance across internal and external channels.
- ▶ **Managing digital compliance is more complex in a rapidly changing ecosystem for marketing and advertising teams.** The challenge has evolved from a one-to-many relationship to a many-to-many relationship. Digital Brand Compliance now includes both access and usage rights for digital media across myriad platforms. Rendered Digital Media may now be comprised of multiple digital assets and elements (e.g. images, video, music, voiceover, product placements, talent, location...). Each of these may themselves come with their own contracts, granted rights, and restrictions. Deciphering these usage rights by channel, territory or even audience is no simple task. Brands require a “single source of the truth” for these digital assets, and that means harnessing the vast amounts of complex data that these relationships between creator and content will produce.
- ▶ **Digital content management systems are increasingly becoming an on-demand service delivered through a suite of systems of engagement.** They serve dynamic experiences directly to end customers. For example, vendors of product information management systems (PIMs) have increasingly added digital asset display functions. Digital Asset Management systems (DAMs) have increasingly added personalization and audience targeting to their platforms. Content Marketing Platforms (CMPs) are employed as editorial platforms that serve different - and extensive - new types of digital media assets to broader audiences.

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Additionally, all these types of platforms have capabilities to automate the manipulation of digital assets. This automation may have unintended consequences, altering context or affecting overall compliance. Finally, all these systems have different ways to manage governance, compliance, access control, and management of global digital asset standards, making ease of use more challenging.

The result is that a more holistic, layered service is needed to create consistency, harness the entirety of the data being generated, and mitigate the risk of brand equity, legal, or financial damage.

- ▶ **Automation and artificial intelligence rapidly increase the quantity and speed at which digital assets are created, managed, or activated.** Content operators must “keep up” and add solutions that enable them to have much more rapid insight and measurement of digital asset compliance, quality, and rights management.

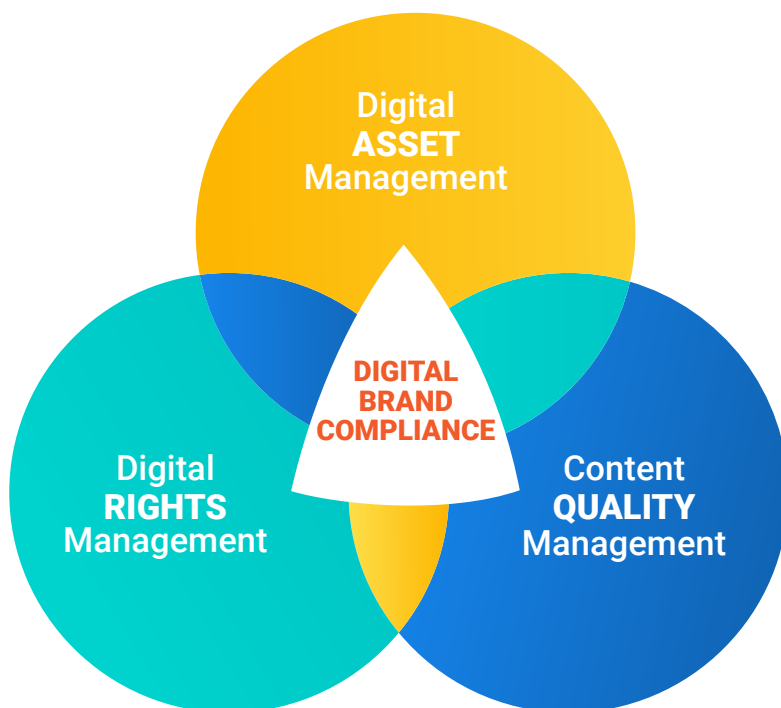


FIGURE 1: DIGITAL BRAND COMPLIANCE
Digital Brand Compliance sits at the center of managing digital media, the rights and usage to them, and their quality against standards.



INTRODUCTION:

Digital Media Becomes A Corporate Asset Worth Managing Well

Is every company now a media company? The answer to that question is still ongoing. However, it is not an overstatement that a critical component of every successful company's marketing strategy is a functioning media management operation.

Even as few as thirty years ago, the idea of becoming organized and scalable in managing digital assets was thought to be only a challenge for traditional media companies.

But in this modern digital world, it isn't just media companies that have recognized the need to manage digital assets in an organized fashion. Product and service brands across just about every industry have similar challenges. The rise of multi-channel digital marketing and advertising has combined with the increased productivity made possible by advancements in digital content software. The net result of this combination means that brands are adopting Digital Asset Management (DAM) systems not just to archive internal creative imagery, photography, and video but to create active portals for sharing all manner of creative assets with distributors, retailers, other partners, and even customers.

In the earliest stages of DAM, these software solutions were known as a System of Record – a “single source for the truth” for storing and archiving what was “okay to use” and what was kept for historical posterity.

These DAMs were then coupled with other Systems of Record such as a PIM (Product Information Management) system to act as another storage and retrieval repository for more technical product content, such as SKU#, labeling information, ingredients, product photography, and other more basic information.

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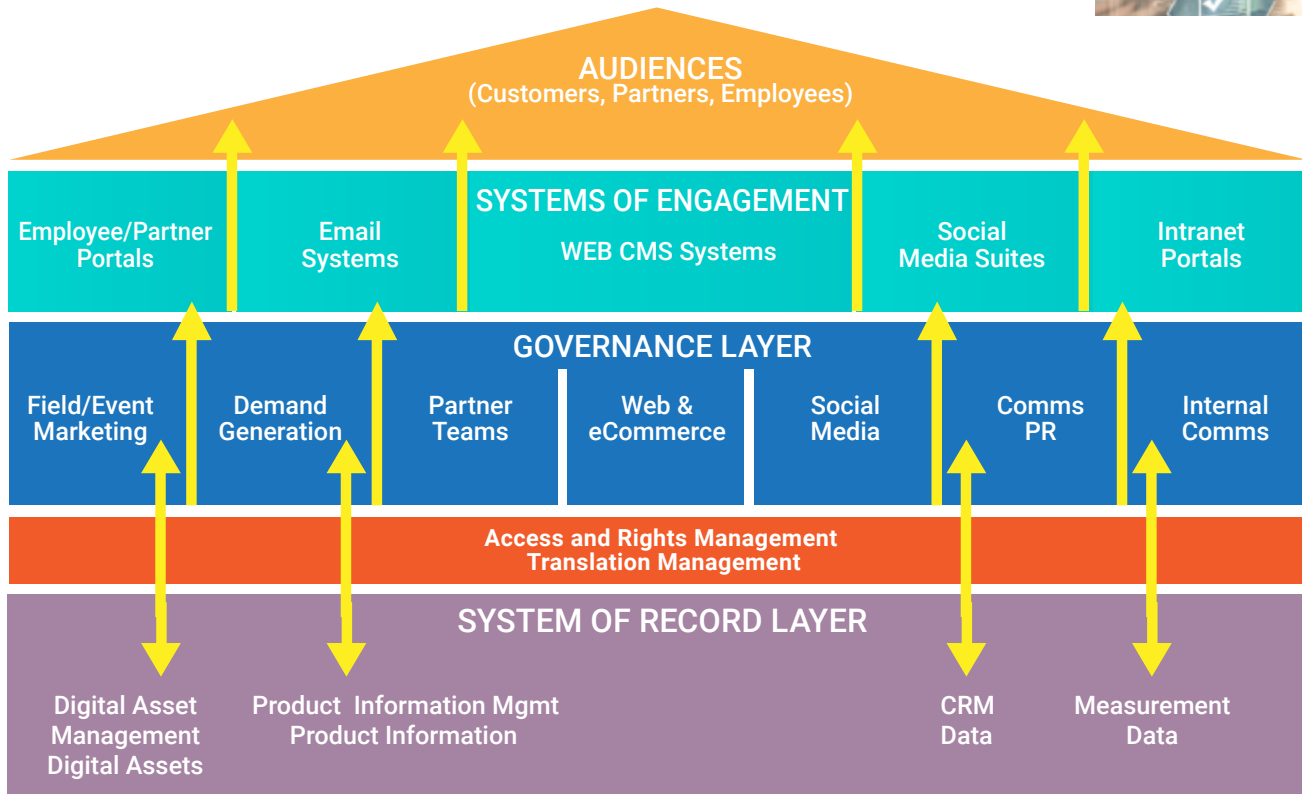


FIGURE 2 – EARLY DAYS OF DIGITAL ASSET MANAGEMENT

Enterprise assets and data made accessible by team and utilized separately across systems of engagement separated by digital media channels

The overriding goal: **ensure the consistent availability of the correct assets, and consistent use by managers at the time they are needed.**

However, over the last decade, DAM and PIM systems have evolved from simple repositories to join content management systems as systems of engagement. As the management and consumption of digital content became more real-time, both DAM and PIM systems required a more core integration not just to manage but also to present what was legal, compliant, and accessible to both internal teams and consumers. This made the access layer more complex and gave rise to more dynamic and cloud-based digital rights management solutions.

“...brands have now begun to act more like media producers and have created a 'next generation' of digital rights management.”



Dynamic Digital Rights Management

As the digital world emerged in the early 2000s, the term “digital rights management” began as simply a means of protecting and securing digital media to ensure that it couldn’t be copied, distributed, or accessed in an unauthorized fashion. Simply put: it became the mechanism that digital media product creators used to protect unauthorized access to their creations.

However, for traditional product and services companies, brands have begun to act more like media producers and have created a “next generation” of digital rights management. For the marketing and advertising teams that make this media, digital rights management has become a more complex strategy and process for ensuring that all the digital assets they create comply with usage rights, copyright regulations, and all licensing agreements.

Additionally, just as DAM systems have become more systems of engagement – serving live content to audiences, so too have DRM solutions become more sophisticated and dynamic – where usage rights, licensing agreements, regional availability, and other compliance standards are maintained live and in real-time.

Then finally, as brands have integrated easy access, availability, and display to digital assets, along with structured rights management, a third element has entered the digital media management ecosystem: the need to manage an expanded definition of digital assets against all new sets of brand compliance rules.

Automated Content Quality Management (CQM)

One of the primary drivers of the exponential growth of digital content has been the rise of more branded content platforms and content marketing programs. As more brands “act like media companies,” the definition of a brand’s digital media assets, usage, and monitoring types have also expanded. For example, market influencers are now routinely engaged in creating digital assets that may need to comply with usage rights but may never enter the company’s internal content systems. Brands may create different media products like online streaming

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shows, podcasts, and other formats that require an exponential expansion of brand media asset types (such as logos, editorial photographs, designed imagery, etc....). Brands may also utilize consumer-generated assets such as “unboxing videos” or other digital media developed across various social media that may also end up as marketing materials. These assets must also be maintained to ensure usage, contractual and other qualitative measures.

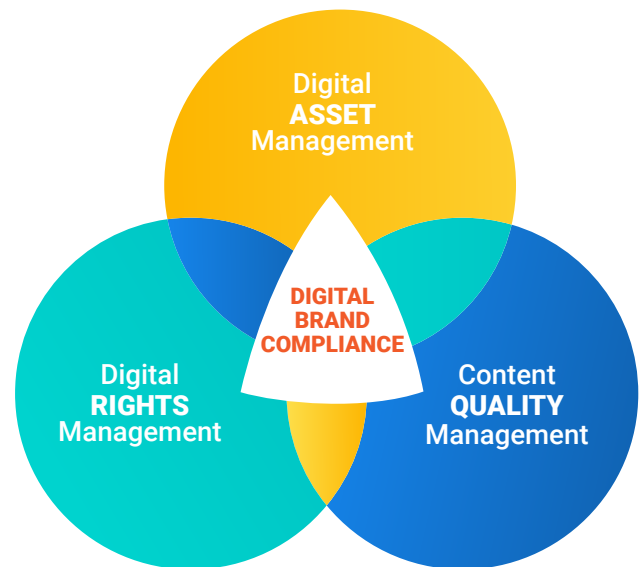
According to recent reports, 97% of brands now employ content marketing as a crucial part of a marketing strategyⁱ. Over half of companies use at least eight digital channels to interact with customers.ⁱⁱ

To meet the overwhelming demand for content, companies utilize a significantly higher number of creators in their approach. The number of people responsible for creating brand content has exponentially increased from internal teams to executives, agencies, freelancers, engaged influencers, and even customers.

New solutions have been emerging to help monitor digital content both before it is published and after it has reached its final destination for display to various audiences. This market is currently small, and most existing solutions monitor essential digital asset quality and conformance to existing repositories of assets. However, a rapidly growing segment of this market is also beginning to monitor rich media assets against more sophisticated content usage standards such as resolution, aspect ratio, colors in an image or video, and of course, usage violations, expirations, and royalty or other payment measurements.

The intersection of all three of these areas has created a new category of solution:

Digital Brand Compliance.





MARKET DEFINITION:

What is Digital Brand Compliance, And Why Does It Matter

Three key trends now include expanded elements of monitoring digital media for compliance and quality:

- ▶ DAM systems are becoming much more real-time systems of engagement
- ▶ DRM systems have become more complex and part of an active brand management strategy
- ▶ CQM systems are growing in complexity and popularity for myriad content marketing programs and extending to rich media monitoring across diverse third-party platforms

These trends have given rise to a new market for an innovative set of emerging solutions in content management: **the real-time capability to manage compliance across digital assets on multiple channels.**

Perhaps the most important trend for brands around content and digital asset management has been the move to in-house creative.

Nearly 80% of Association of National Advertisers (ANA) members have some form of in-house agency.ⁱⁱⁱ

Their study found that the number has grown substantially over the last five years.

The number one service that has spurred the move to in-house agency services is “content,” specifically content marketing. Brands are increasingly taking the reins regarding content management, digital asset management, and the quality of their digital content.

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In the ANA research, “cost efficiencies” and “better knowledge of brands” were the top two benefits noted from moving services in-house.^{iv} Brands, both big and small, have reduced creative production expenses by as much as 30%^v as they shift the creative, strategy, and production of digital media from external agency partners to in-house production teams.

But, it’s more than just efficiencies. Brands have also been moving more digital content creation to local marketing groups. Local marketers in different regions, teams, and even functions in the business are being encouraged toward the “self-service” model of creating, managing, and activating digital assets.

A great example of this is Whirlpool. They recently moved the entirety of their content and content creation management in-house into a new internal agency. This move includes digital asset management, digital rights management, and content quality.

The combination of the three major trends in digital assets and the market growth in all areas has created a new market segment for solutions that focus on managing the holistic nature of digital media compliance. **This is Digital Brand Compliance.**

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MARKET SIZING:

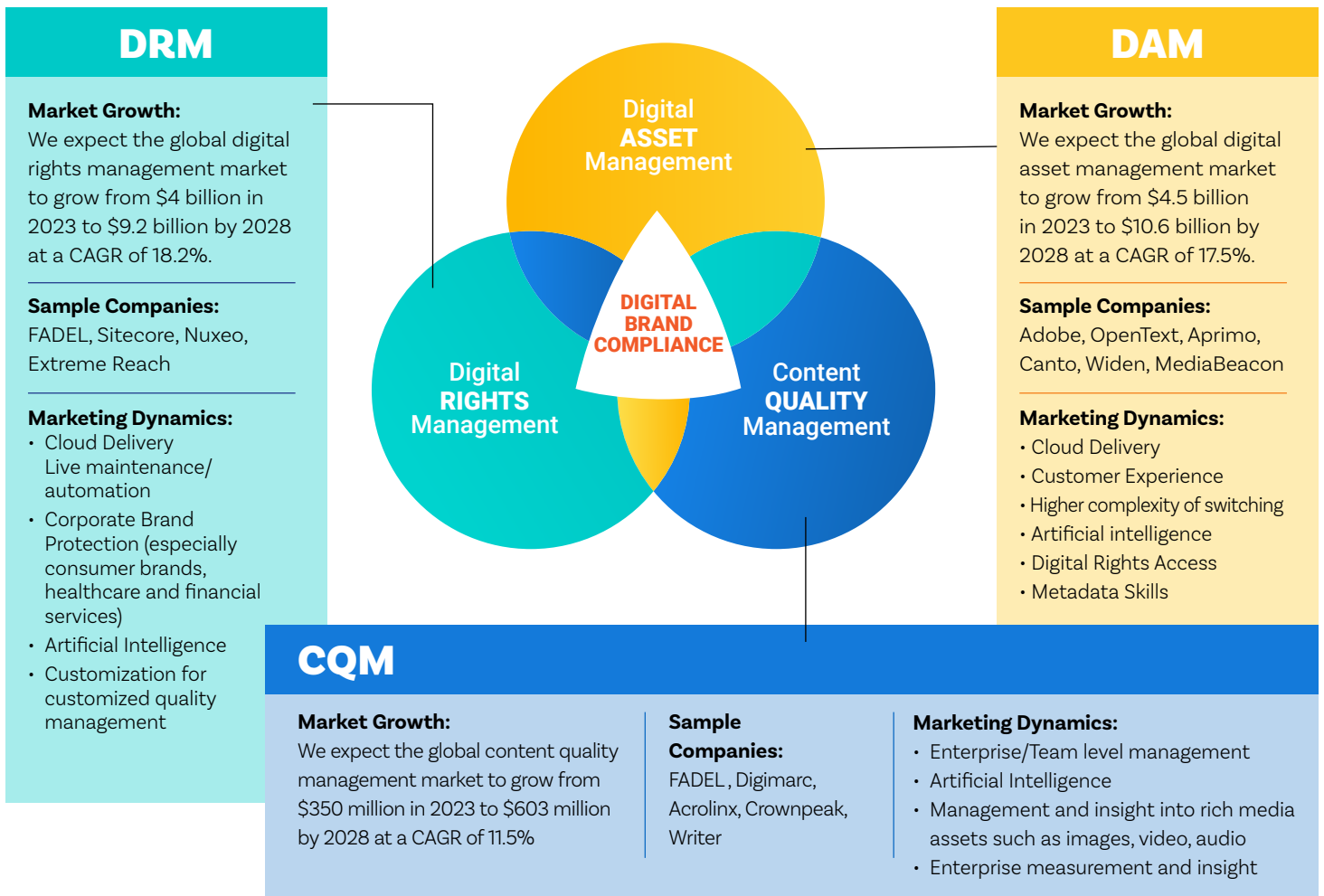
Digital Brand Compliance

A New but Growing Segment of a Media Management Strategy

There is no question that the three core segments of Digital Asset Management, Digital Rights Management, and Content Quality Management are growing.

Across all three market segments, we see vital players and dynamic new startups providing for a diverse, competitive marketplace. The exponential growth of digital media management as a growing concern for product and service brands suggests we will see considerable new investment in the next five years.

Across the three segments, CMI sees the growth and market dynamics of each as follows:



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We project the Digital Brand Compliance market will primarily reflect the size and growth of both the DAM and DRM for advertising and marketing market. We expect the value of the market to be approximately \$4 billion in 2023. We project that Digital Brand Compliance will grow at a CAGR of 18% over the next five years. It is an ever more critical component of a modern content management strategy for product and services companies

CMI’s Market Definition: Digital Brand Compliance

CMI defines Digital Brand Compliance as **a solution that helps orchestrate and automate the complexities of digital media assets’ legal, usage, compliance, and custom brand standards across a multi-channel ecosystem.**

Digital Brand Compliance solutions are a subset of technology solutions that span across three elements of what CMI calls the Digital Experience Technology Stack (Fig 3).

The standard foundation of these solutions is the ability to harness the overwhelming amount of data generated by governing the proper usage of digital assets – and how to use that data to gain insight, trigger automation, and inform engagement systems about the right content to display.

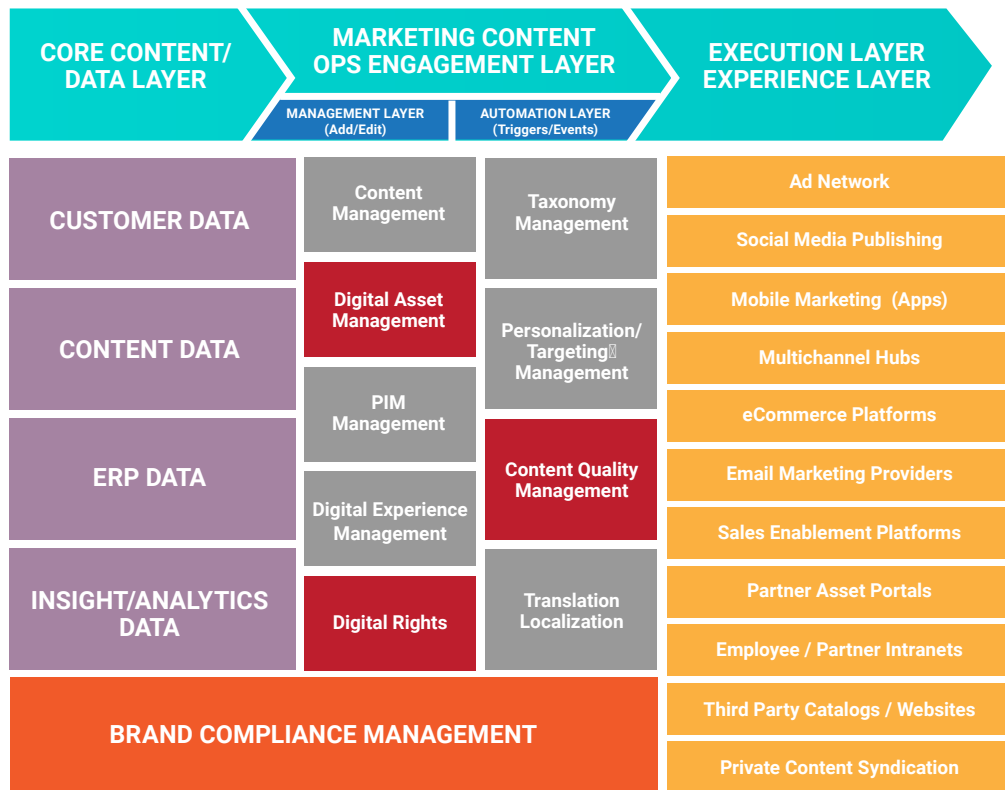


FIGURE 3 - MODERN CONTENT OPERATION ACROSS THE DIGITAL EXPERIENCE TECHNOLOGY STACK



The four foundational elements are:

1. Access to Content Data
2. Access to Customer Data
3. A Centralized Management Layer
4. Automated Triggers/Events for Insight and Analytics

Enterprise Brand Compliance Solutions focus on bridging the needs of larger enterprises with rules and automation to take control of their own digital asset media data concerning optimization, compliance, quality, licensing, and access.

These Solutions contain:

- ▶ **Added Value to Content Data** – Digital Brand Compliance tools bridge core content data and add significant insight into the entirety of digital media being stored. These solutions provide a repository of content attributes not captured by traditional asset management systems. This may include talent profiles, stock agencies, freelance workers, and influencers. They also charge and manage agreements and rights for digital asset creators such as designers, models, videographers, subject matter experts, or influencers. These separate repositories create more accessible access to a many-to-many relationship so that if one (or multiple) agreements change, all assets associated with or related to those agreements are updated in real-time.
- ▶ **Added Value to Customer Data** – Digital Brand Compliance solutions enhance customer data for targeting purposes. These solutions help ensure that assets used across multiple channels can be used to enhance or personalize customer experiences appropriately. Brand Compliance Solutions look at trends across channels and can identify which assets are most popular, specifically in which context this popularity is achieved. These solutions also generate the contextual attributes that enable other systems to target the right content to the right audience at the right time. For example, they can help determine which assets should be available to a particular retailer, or a range of employees or partners.



- ▶ **Centralized Management and automation of content tracking and compliance.** These solutions provide a centralized way to manage and automate the identification of legal, compliance, or brand standards defined as digital asset attributes across any channel. They also offer to create rules to detect if published assets have usage violations across channels, territories, and time frames. They also provide automated crawling for individual digital asset recognition and automated matching against standardized, managed content. Additionally, content quality rules can be set for digital assets against unique attributes.
- ▶ **Automation of content tracking and compliance - complete insight/analytics -** Digital Brand Compliance solutions provide enhanced insight and analytics. Brands can assess risk exposure (for rights violations) across channels, territories, or even time-based horizons. They can also identify lists of assets that are expiring or “near expire,” allowing brands to either replace assets or renew agreements. Additionally, reports for third-party usage of assets provide digital asset recognition without watermarks or digital fingerprints.

Digital Brand Compliance solutions sit in context with systems of engagement such as Digital Asset Management or Enterprise Content Management. They are a new layer to manage and orchestrate content quality, access, and compliance to usage agreements.

Enterprise Brand Compliance Solutions focus on bridging the needs of larger enterprises with rules and automation to take control of their own digital asset media data concerning optimization, compliance, quality, licensing, and access.



MARKET DIRECTION: Digital Brand Compliance

Content Marketing Institute sees three main drivers for adopting new Brand Compliance Management solutions.

- ▶ Digital Content Transformation
- ▶ Artificial Intelligence and Automation
- ▶ Digital Content-As-A-Service (CaaS)

■ Digital Content Transformation

In today's digital-dominant world, more and more business stakeholders play a crucial role in marketing and customer satisfaction. Today's content-driven digital experiences are managed and fed by uncontrolled content from influencers, executives, marketing, sales, customer service managers, and even other customers.

The myriad digital content experiences created by the business are inexorably connected and directly reflect (good or bad) the business's ability to develop cohesive, integrated value.

To meet this tsunami of demand for rich content creation and distribution, businesses have begun to democratize the entire process of digital content. This results in multiple and differently scoped content management platforms such as Digital Asset Management Systems, Digital Experience Management Systems, Social Media Suites, eCommerce Platforms, and Content Marketing Platforms.

There is a need for an enterprise layer across all of these content management solutions and insight into who, where, what, and how the usage of this content is allowed. Any of these solutions may cover internal content properties, and any one or multiple may handle digital access rights or brand-specific use of content.

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■ **Artificial Intelligence and Automation**

Different technology sectors have seen the growth of artificial intelligence (AI) and automation for decades. However, AI has now evolved to profoundly affect how digital content is created, managed, activated, and measured for marketing.

New artificial intelligence solutions are:

- **Providing visual search capabilities for digital assets.** Helping enhance metadata (or the lack thereof), new AI solutions can provide a more accurate search for the right digital assets simply by allowing users to describe the asset they want to see visually.
- **It enables automated content creation**, multiplying exponentially the number of digital assets produced by a brand. From automatically generated stock images to logos to multiple versions of videos – the sheer quantity of rich media that will be made by artificial intelligence in the coming years is staggering. Harnessing this onslaught of new digital media will be critical for mitigating financial risk.
- **They are powering intelligent content analysis and categorization.** New AI solutions are enabling companies to create scalable personalization, enable automatic digital asset tagging, and even levels of automatic routing for approvals and publishing. Brand Compliance Solutions will be needed to monitor assets wherever they are in the development lifecycle.
- **Providing predictive analytics** to the creators and managers of content even before they publish or activate it.

As AI increases the quantity and speed by which content is dynamically created, managed, and measured, there will be a correlative need to ensure that content can be protected and monitored simultaneously. Modern content operations will rely heavily on AI and automation – and Digital Brand Compliance will be an influential part of the current Content Operations approach.



■ Digital Content-As-A-Service (CaaS)

The number of digital channels on which brands want to display their digital content continues to rise exponentially. There are external publishers for advertising, online retail for product catalogs and marketing assets, distributors for product imagery and videos, mobile and desktop apps for editorial, shopping, customer assistance, and all other new interfaces.

Content-As-A-Service (CaaS) has begun to address this challenge by replacing enterprise content management platforms with the ability to serve “raw” content and digital assets out to all of these platforms from a centralized place. These “headless” CMS systems are often additive to the existing ecosystem to more efficiently manage the content that is distributed in this way.

However, many brands still choose to create multiple versions of assets for specific destinations. Product photos available to one retailer may be restricted to another. How-to videos that go to one distributor should be in one format for one goal and another for a second, third, or fourth destination. Licensing and royalty rights to one external channel in one region may be much different in another region.

A Digital Brand Compliance approach will need to bridge all the content being fed out to these external destinations and monitor those external platforms separately. They must also be able to help provide insight across external destinations about where there may be usage challenges, upcoming deadlines (such as rights), and the ability to create rules to automate such display challenges.



Conclusions

Undoubtedly, the societal disruptions of 2020 – 2022 have accelerated the need for larger organizations to take a more dynamic approach to digital experiences. Modern marketers are more focused on different channels, media types, and content contributors than ever before.

We have seen investments in Digital Brand Compliance become more prioritized over the last two years as the impact of risk in mismanaged or misappropriated digital assets becomes more pronounced.

And while the existing legal, compliance, and standards-based content monitoring solutions have been adequate for some needs, the sophistication of content distribution, the nature of rich media types, the complexity of licensing and usage agreements, and the nature of targeted customer experiences leave a growing number of visibility gaps for the modern marketing department.

Digital Brand Compliance is poised for tremendous growth in the next five years. CMI's recommendations for brands looking to bolster their capabilities in this space are:

- ▶ Look for a DBC solution that can provide the unique mix of external and internal asset monitoring and management as a cloud-based service. Best-of-Breed solutions in this space will not replace pureplay digital asset management solutions, digital rights management, or content quality management solutions. Instead, they will integrate into these solutions to provide an effective layer to harness ALL the data generated around digital asset compliance and quality.
- ▶ Evaluate these DBC solutions with an ability to provide ease of use for marketing and content operations staff. Creative agencies, internal, finance, and IT professionals will naturally use these solutions. Look for solutions that offer easy-to-use interfaces to create the functionality that will be needed.



- ▶ When considering other solutions such as DAM, PIM, DRM, or even Digital Experience Management, assess the vendor’s ability to address the business requirements mentioned here. Can these vendors manage both internal and external asset repositories? Can they provide for customizations, complex licensing, access, or other brand-specific needs? These are often not legal considerations for solutions like Digital Asset Management – to ensure they aren’t forgotten.
- ▶ Leverage this dynamic marketplace by being responsive to new offerings in this space. There will be innovative and new ways to tackle this challenge in the coming months and years, and these features and solutions may begin to emerge from non-traditional points.

Methodology

Content Marketing Institute identifies market categories within the practice of content strategy for analysis based on the trends we can observe within companies. Our research focuses on providing the insights that can help our clients with the planning and investment into the best methods for creating, managing, measuring, and scaling their strategic content efforts.

Exhaustive secondary research is performed to collect information on the DAM, DRM, and CQM spaces – precisely segment the DRM space to those companies focused on DRM for marketing and advertising media within product and services companies. Secondary sources include annual reports, press releases, investor presentations, and thought leadership materials from vendors.

Following our secondary research, we validated many assumptions with industry experts across the different verticals. We estimated market sizing and growth using both a bottom-up and top-down perspective.



About Content Marketing Institute

Content Marketing Institute is the leading global content marketing education and training organization, teaching enterprise brands how to attract and retain customers through compelling, multichannel storytelling. CMI's Content Marketing World event, the actual content marketing-focused event, is held every fall in Cleveland, Ohio. The ContentTECH Summit event is held every spring in San Diego, California. CMI publishes Chief Content Officer for executives and provides strategic consulting and content marketing research for some of the best-known brands in the world.

About Robert Rose & The Content Advisory

Founded in 2010, TCA is the leading content strategy consulting, research, advisory, and education company. Our clients rely on us for valuable insights on content strategy, marketing, digital transformation, data privacy, and customer experience. Since our launch, we've worked with more than 500 organizations, including 15 of the Fortune 100. We've consulted directly with organizations such as Adidas, Anthem Insurance, Capital One, NASA, Microsoft, LinkedIn, Facebook, CVS Health, 3M, and The Bill & Melinda Gates Foundation.

TCA provides business insights, advice, and tools through our on-demand subscription platform, customized consulting, training, and research assignments.

Robert Rose is the CEO and Chief Strategy Officer for The Content Advisory- and as such, is responsible for the organization's strategic advisory, education, research, and consulting services.

About FADEL

FADEL®, innovator of brand compliance, rights management, and royalty billing software, has worked with some of the biggest names in media, life sciences, fast-moving consumer goods, publishing, high-tech and advertising. By automating talent and content rights management across videos, photos, ads, music, products and brands, and streamlining the processing of licensing royalties, FADEL's cloud-based solutions have empowered businesses to significantly maximize revenues and increase process efficiencies. Founded in 2003, FADEL is headquartered in New York City, and also operates offices in Los Angeles, Montréal, London, Paris and Lebanon. For more information, visit fadel.com.

i [*SEMRush State of Content Marketing 2022 Global Report*](#)

ii [*Aberdeen Strategy & Research Omni-Channel Customer Care: How to Deliver Context-Driven Experiences*](#)

iii [*MediaPost: ANA: Over Three-Quarters Of Our Members Have In-House Agencies*](#)

iv [*The Continued Rise Of The In-House Agency*](#)

v [*Unilever Claims To Have Saved 30% On Production Costs After Taking Work In-House*](#)

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