Making the case for digital asset management in retail

Using technology to manage digital assets effectively

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Executive Summary

- Ovum carried out a survey of retailers on behalf of DAM vendor WoodWing, to better understand retailers' current practices and attitudes to the management of digital assets, as well as their understanding of DAM.
- The majority of retailers communicate via a broad range of channels including print, Web, mobile, and social media.
- This inevitably leads to a sharp rise in stocks of media files such as photos, video, audio, layouts and more commonly referred to as digital assets.
- Digital assets can be described as any digital material, which can take the form of photos, drawings, graphics, video, audio, diagrams, presentations, catalogues, PDF files, Word documents, layout files, and more.
- Digital assets need to be managed differently from text-based documents that are managed and stored in an enterprise content management (ECM) repository.
- Digital assets should be stored in a dedicated digital asset management (DAM) system.
- DAM is a specialized area; ensure that a dedicated system is used, either from a specialist DAM vendor, or as part of a web experience management (WEM)/customer experience management (CX) implementation.
- Take care if using the DAM capabilities of a larger product as some WEM/CX vendors only provide lightweight DAM capabilities and not a fully featured system. If in doubt ask the vendors whether their product can be used as a standalone DAM system.
- Most retailers think they understand what DAM is and believe that they have deployed DAM. The reality is different, as the majority of retailers waste hours each week searching for files. In fact, some employees are spending in excess of 10 hours per week searching for digital assets.
- Many retailers are using internally built systems to manage digital assets. Consider whether an internal system can provide the ability to locate assets speedily, if it includes version control, supplies a complete audit trail of all actions taken on an asset, and allows the asset to be repurposed and reused easily. If it does not then consider a commercial DAM system.
- Retail organizations are struggling to build the infrastructure required to manage digital assets.
- With millions of digital assets, in a variety of formats to be managed, repository sizes can grow extremely quickly. Scalability in a DAM system is considered to be very important by retailers yet clustering, a mechanism to achieve unlimited scalability, is surprisingly not seen as being as important.
- Organizations should examine the feasibility of adopting a cloud model, which will provide high availability, scalability, and redundancy if they have problems putting in place and managing the infrastructure required for an on-premises system.

Introduction

- A majority of retailers will encounter issues of managing assets in multiple languages for multiple sites.
- The majority of retailers sell between 501 and 50,000 products.
- More than half of the retailers manage between 2 and 10 websites, with a few managing between 50 and 100 sites.
- 56% provide content in two to five languages, with a further 22% providing content in between six and ten languages.
- All retailers are candidates for DAM systems and should have a dedicated repository for these assets.

In the survey, 250 retailers were interviewed via telephone, with an even split between the US and the UK. The retailers fall into a number of types, which are: department stores, supermarkets, discount retailers, warehouse, specialist retailers, convenience retailers, and e-tailers. Out of the 250 retailers, only two do not have a website at all, and the majority of retailers have more than one website.

However, despite this, slightly more retailers sell products nationally than internationally. In terms of international markets, UK retailers have a huge lead over their US contemporaries with 61% of UK companies selling internationally compared with only 31% of US retailers. Despite this, only 14% of retailers create material in a single language, indicating that even US retailers that sell products to the domestic market only are still creating content in more than one language. This means that a majority of retailers will encounter issues of managing assets in multiple languages for multiple sites.





Source: Ovum's Making the case for Digital Asset Management Survey 2015

The majority of retailers interviewed for this survey sell between 501 and 50,000 products. Nearly half (46%) describe themselves as being part of a chain, with just over a third (34%) a franchise, and the remaining 20% a subsidiary. More than half of the retailers manage between 2 and 10 websites, with a few managing between 50 and 100 sites. In terms of language 56% provide content in two to five

languages, with a further 22% providing content in between six and ten languages. The channels to market are online pure-play (11%), physical stores (14%), and multichannel (74%). Almost all retailers create their own web content, rather than relying on an agency for this purpose.

From the results of the survey, Ovum believes that it is likely that some of the pure-play online retailers are smaller in size than the other types of vendors as they are more concerned about having the expertise required to implement and manage a DAM system than the other categories of retailers. This suggests that they, in particular, are suited to the cloud model of deployment for DAM. However, the results suggest that all retailers are candidates for DAM systems and should have a dedicated repository for these assets.

Users waste a lot of time searching for assets

- 38% of employees spend between five and ten hours per week searching for assets.
 A further 17% spend in excess of ten hours on this task.
- As the file size of these assets can be very large, storing them alongside content in a ECM system will result in a very large, unmanageable repository, which will not provide the features that are required to manage and manipulate digital assets.
- Incomplete metadata make it difficult to locate assets.
- Without a central location in which to store digital assets, users may end up having to recreate assets.

An indication of the scale of the task of finding and using digital assets comes from the Ovum survey, which indicates that 38% of employees spend between five and ten hours per week searching for assets. A further 17% spend in excess of ten hours on this task. A person who spends 7.5 hours per week searching for assets is losing an entire day. Taken over a year, this equates to about 45 days per year of lost productivity. Using a dedicated repository that also manages the detailed metadata associated with digital assets, and includes an extensive search capability, digital assets can be located in seconds.



Source: Ovum's Making the case for Digital Asset Management Survey 2015

Retailers face issues creating content for multiple channels

Retailers have multiple websites in different languages

The Ovum survey shows that a majority of retailers have between 2 and 50 websites to manage, in multiple languages (in some cases in excess of 10), with many thousands of pages to support, and millions of digital assets. In addition, more enlightened retailers will want to serve up specific content to individual website visitors according to the profiles they have built using web analytics. Most WEM/CX products systems have the ability to build and deliver web content on-the-fly, which means being able to access digital assets as well as textual content instantly.

In addition, a high proportion of visitors now access web content via mobile devices, which can be problematic as digital assets will need to be rendered differently for each device. For example, assets will need to be delivered at a different resolution and size for display on small-screen mobile devices than those delivered to a large-screen desktop PC. The WEM/CX system needs instant access to digital assets; therefore it is important that they are stored in an appropriate system from which they can be speedily accessed.



Retailers need to create multi-channel content

However, it is not just websites that content needs to be created for. Although an increasing proportion of consumers interact with retailers solely via online methods, retailers still need to produce material for delivery though multiple channels including, print, direct mail, email, online advertising, television, print advertising, and social media such as Facebook, Twitter, Pinterest, and Instagram. Even apps for tablets and smartphones and, most recently, messaging platforms such as WhatsApp are used.

They also have multiple types of content that needs to be managed, including general marketing flyers, flyers with personalized content, brochures, web content/images, point of sale materials,

banners, redeemable vouchers, loyalty program promotions, direct mail content, SKU pictures, promotional messages, and product specifications.

From the Ovum survey, it is clear that every category of retailer creates content of every type. The below graph (Figure 4) shows the overall percentage use for all types of content.



Figure 4: Types of content that retailers create, 2015

These marketing collateral types contain digital assets such as photos, video, audio files, graphics, catalogues, diagrams and drawings, PDF files, Word documents, and layout files, as well as usergenerated content.

Figure 5 below, shows the different types of digital assets used by retailers. Considering this alongside the wide variety of material they produce, it is clear that there will be a high degree of repurposing and reuse of digital assets.

Source: Ovum's Making the case for Digital Asset Management Survey 2015



Source: Ovum's Making the case for Digital Asset Management Survey 2015

Assets need to be reused and repurposed

Reusing assets across different channels can be problematic if individual teams work on content for each channel. An issue that arises when using a general repository to store digital assets is that once an asset has been found, there may be multiple versions resulting in confusion on the part of the user as to which is the correct one to use.

This can be critical if digital assets such as product images have start and expiry dates assigned to them. In addition, there may be no controls to prevent multiple users from working on and changing an asset at the same time. It then becomes impossible to know which the most recent version is, and there is nothing to stop one user undoing changes another user has made. Incomplete metadata can also make it difficult to locate assets. Without a central location in which to store digital assets, users may end up having to recreate assets, resulting in yet more lost productivity.

A more worrying concern is that there are no checks in place to ensure that the appropriate licenses are in place for the use of specific assets. This can have litigation issues, and can result in a retailer being faced with legal action and possibly a fine, with the inevitable brand damage that this causes.

DAM systems provide specialized functionality to manage digital assets

DAM deals with the ingestion, annotation, cataloging, storage and retrieval as well as sharing and distribution of digital assets. Although the capabilities of DAM differ between products, DAM systems are expected to have a number of standard capabilities. These are:

- Ability to organize and manipulate digital assets
- Search capability and metadata management
- Verification of the integrity of digital assets
- Delivery, sharing, and distribution of digital assets
- Ability to secure assets, including copyright
- Backup of digital assets.

DAM systems provide features not available in other systems

- The large file sizes of some digital assets such as video would make them difficult to manage within ECM repositories.
- Business systems that DAM systems should integrate with include product information management (PIM) and customer relationship management (CRM), in order to streamline processing and to increase the ROI of content.
- It is important that any DAM system provides easy integration with a wide range of other applications.
- Almost half of all retailers (49%) believe that integration is a very important DAM feature with a further 41% believing it to be important.
- 42% of retailers believe it is very important to be able to deliver digital assets to mobile devices, with a further 47% considering it to be important.
- Content must be rendered into different formats and resolutions, and have the ability to be shared or syndicated.
- Access rights and permissions are incredibly important in DAM systems for controlling who has access to assets and what they are able to do with them.
- Ensuring that assets are secure and not accessible to unauthorized users is the top priority to all categories of retailer.
- Good quality metadata is a vital element of DAM, as accurate and detailed metadata aids the search process.
- A good DAM system will support industry-specific taxonomies and will also allow organizations to create their own categories.
- Retailers must not be afraid to add their own metadata fields, the more information there is about a digital asset, the easier it will be to locate in the repository.
- An effective search engine must be available that allows digital assets to be located in seconds. For scalability, a search engine approach offers significant performance advantages over integrated databases.
- Also important is having the ability to track licenses to ensure that digital assets are being used appropriately. This should be a top priority to all organizations.

It is important that DAM systems are able to integrate with other applications to increase the ROI of digital assets and to streamline business processes. The most obvious platforms using digital assets are ECM/WCM applications as well as workflow systems for multi-channel publishing. In many organizations, the integration of DAM systems with other business systems including product information management (PIM) products and customer relationship management (CRM) is required.

The Ovum survey suggests that the ability to integrate with other systems is an important DAM feature for retailers, yet it is also often perceived as a prohibitor to the implementation of DAM. Therefore it is important that any DAM system provides easy integration with a wide range of other applications. Overall, almost half of all retailers (49%) believe that integration is a very important DAM feature with a further 41% believing it to be important. However, the breakdown of retailer types shows that warehouse retailers regard integration to be less important, whereas for other retailers it has a much greater level of importance, as depicted in figure 6 below.



Figure 6: The importance of integration as a feature of a DAM system, 2015

Source: Ovum's Making the case for Digital Asset Management Survey 2015

Standard features of a DAM system include the ability to view assets as thumbnails, allowing users to quickly locate or select the image they require. Some systems save on storage requirements by compressing assets in storage. This is an important consideration at a time when digital assets are becoming much more important to organizations that are creating more-visual websites that rely heavily on digital images, and the number of film, video, and music libraries is growing.

DAM systems are ideally suited to managing assets for delivery to mobile devices

An increasingly mobile population demands content on the move through a variety of channels, such as smartphones and tablets. In the Ovum survey, 42% of retailers believe it is very important to be able to deliver digital assets to mobile devices, with a further 47% considering it to be important. Therefore, a DAM system must be able to address this requirement by enabling digital content to be distributed through multiple channels. To achieve this, the content must be rendered into different formats and resolutions, and have the ability to be shared or syndicated. The most efficient DAM systems maintain a single copy of the file in the repository and render it into different formats on the fly for distribution via multiple channels to a plethora of devices, including PCs, smartphones, tablets, and other mobile devices.



Figure 7: Importance of the ability to deliver digital assets to mobile devices, 2015

Source: Ovum's Making the case for Digital Asset Management Survey 2015

Access rights and permissions are incredibly important in DAM systems for controlling who has access to assets and what they are able to do with them. This is borne out in the Ovum survey as ensuring that assets are secure and not accessible to unauthorized users is the top priority to all categories of retailer.



Figure 8: Importance of access rights and permissions, 2015

Source: Ovum's Making the case for Digital Asset Management Survey 2015

Other extremely important features that commercial DAM products provide include metadata, taxonomies, and classifications. Good quality metadata is a crucial prerequisite, the lifeblood for DAM, as accurate and detailed metadata enable the efficient and targeted search process.

There are specific metadata types for different kinds of digital media. Content that was created digitally will have far more metadata relating to it than content that has been digitized. For example, digitally taken photographs store the time and date that the image was created, and also information about the settings that were used to create the image, as well as allowing users to enter additional information such as the location. By contrast images that were not created digitally will often need to have metadata added manually when they are digitized.

A good DAM system will support industry-specific taxonomies and will also allow organizations to create their own categories. The ability to classify digital assets is vital in making assets searchable. Metadata issues are important to retailers as the Table 1 below shows.

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|----------------------------|----------------------------|------------------------|------------|
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| Tuble 1. Importance o | metadata reatares (an r | iguies are in percent | |

| | Very important | important | Not important | Least important |
|--|----------------|-----------|---------------|--------------------|
| Being able to import metadata with the image | 47 | 41 | 8 | 4 |
| Being able to embed metadata in files | 47 | 36 | 10 | 6 |
| Having pre-defined metadata fields | 47 | 34 | 11 | 8 |
| Support for a wide range of metadata standards | 43 | 39 | 13 | 5 |
| Being able to add extra metadata | 42 | 46 | 6 | 6 |
| Being able to use metadata to control/expedite/automate workflows | 40 | 41 | 12 | 7 |
| Being able to define metadata fields | 38 | 46 | 10 | 6 |

Source: Ovum's Making the case for Digital Asset Management Survey 2015

All of the metadata questions that were asked in the survey are features that should be present in a good quality DAM system. Having pre-defined metadata fields was regarded to be a high priority for retailers, yet being able to define metadata fields themselves was less important overall, suggesting a reluctance amongst some retailers to add their own metadata fields. However, metadata is extremely important and on occasions even a system with extensive pre-defined fields will be missing information that needs to be associated with an asset. Retailers must not be afraid to add their own metadata fields, the more information there is about a digital asset, the easier it will be to locate in the repository.

In order to speedily access digital assets an effective search engine must be available that allows digital assets to be located in seconds, not the hours that many users in the retail industry currently take. It must offer a range of search options and be able to search on all metadata fields. In addition, it must adhere to access rights and permissions so that assets that a user conducting a search is not authorized to view will not be returned in the results list. The ability to find assets quickly is a high priority for retailers as can be seen in Table 2 below.

Often a single version of a digital asset will be stored in the DAM system to save on space and users will be able to resize and change the resolution of assets when they access them. However, on occasion it may be important to store different versions of the same asset so that it can be reused within a timeframe, or in a particular scenario. It is here that version control becomes important in ensuring that users always access the correct version of a digital asset. An audit trail provides a complete history of every asset, showing when changes were made to an asset, by who, and when they were made, as well as details of when an asset was accessed. A check-in and -out feature prevents multiple people working on, and changing, an asset simultaneously. These features address many of the pain points faced by retailers

Some assets will need to go through an approval process, and for this to work effectively a workflow capability is required. Although this is not a top priority for most of the respondents in the Ovum survey, it is nevertheless an important consideration when selecting a DAM system.

Also important is having the ability to track licenses to ensure that digital assets are being used appropriately. This should be a top priority to all organizations that use assets from a number of different external sources, as license breaches are likely to be high profile, resulting in expensive litigation.

The ability to share and collaborate on assets is another feature that can be expected in a DAM system. Users will often need to share assets, and add annotations and comments. Often the collaboration will need to extend to external parties, and a DAM system must be able to accommodate this.

Table 2 below shows the importance of DAM features to the retailers surveyed. All numbers are in percentages, and have been rounded to whole numbers. Although all features are very important or important to the vast majority of respondents, it is interesting that a check-in and -out feature is the least important, as this is a very important feature for the management of digital assets.

Table 2: The importance of DAM features to retailers (all figures are in percentages), 2015

| | Very important | Important | Not important | Least important |
|---|----------------|-----------|---------------|--------------------|
| Assets are protected from unauthorized access | 52 | 48 | 8 | 3 |
| Assets can be easily and quickly found by all authorized users at any time and from any location | 52 | 37 | 8 | 3 |
| Assets are kept in a central repository | 46 | 44 | 8 | 2 |
| Assets can be easily and efficiently shared with internal and external stakeholders | 46 | 40 | 8 | 5 |
| Tracking of licences | 44 | 46 | 8 | 2 |
| Tracking which file has been used for what purpose | 44 | 44 | 9 | 4 |
| Assets can be viewed on any type of device | 43 | 47 | 7 | 2 |
| Approval workflows | 33 | 52 | 9 | 6 |
| A check-out/-in facility | 32 | 52 | 11 | 4 |

Source: Ovum's Making the case for Digital Asset Management Survey 2015

DAM should be regarded as a must for retailers

Most retailers already think they are using DAM

- 64% of retailers are either using a system developed by a partner, or are using an internally built system.
- Users should ask themselves the following questions:
 - Does the system they are using allows them to locate assets speedily and accurately?
 - Are they confident that they are using the correct version of an asset?
 - Do they know who has been working on an asset and what they have done to it?
 - Are they sure that no one else is currently making changes to the asset?
- If they cannot answer yes to all of the above questions, then their current system is not providing DAM capabilities.
- By centrally managing all digital assets it is easy to maintain control over the way in which they are used on local sites.
- As a web page can have an extremely short life, assets need to be located and used quickly. Hours spent looking for individual assets is not acceptable in the age of dynamic, personalized, highly relevant web content.
- DAM systems have been designed to support a wide range of formats and resolutions.
- A DAM system allows multiple versions of assets to co-exist.
- Retailers regard the ability to store assets such as flyers, catalogs, and other types of digital content combining text and images in a DAM system as being important.

Although most of the retailers in the survey believe they are using DAM, when asked what type of system they are using, their responses suggest that the reality is somewhat different. More than half of the retailers surveyed are either using a system developed by their IT department or partner, or are using an internally built system. When asked what they understood a DAM system to be, nearly 40% believed it to be a file management system, a central repository for digital assets, or an image archive. While all of these systems may provide a dedicated repository in which to store digital assets, they may not provide all of the capabilities required to manage and use them. Figure 9 below shows the type of systems being used to manage digital assets.





Management Survey 2015

If organizations do manage to create a homegrown DAM there can be difficulties when systems that the DAM integrates with are upgraded, as this may result in code within the DAM having to be rewritten each time other systems are upgraded, or new systems implemented.

Users should ask themselves: whether the system they are using allows them the locate assets speedily and accurately; that they are confident that they are using the correct version of an asset; that they know who has been working on an asset and what they have done to it; and they are sure that no one else is currently making changes to the asset. If they cannot answer yes to all of the above questions, then their current system is not providing DAM capabilities.

The management of digital assets can be made easy

Most retailers will have large libraries of digital assets, which will be used in a variety of ways. The first point of contact for many customers is the retailer's website. This will contain a large number of digital assets and documents including photos, catalogs, branding components and logos, and possibly video and audio. When creating web content the users will need to select the digital assets they need to use. They will most likely be using a template which already contains the branding elements, so they will just need to create or select the text, and add the images, which will most likely be photos or video. The ability to quickly select the image from the DAM repository, resize it, and drop it onto the page is an important requirement when creating web pages that may have a short lifecycle.

Most retailers have multiple websites to manage in a variety of languages. In the Ovum survey the majority of retailers have to support content in between 2 and 10 different languages as can be seen in figure 10 below. By centrally managing all digital assets it is easy to maintain control over the way in which they are used on local sites, most of which will contain a combination of local and global content. Digital assets can be made to go through an approval process using the workflow capabilities built into DAM systems. Assets can also be selected "on-the-fly" according to the profile of the site visitor, through the ability of WEM/CX systems to be able to dynamically build pages. Integration

between WEM/CX and DAM systems allows digital assets to be selected to help build these personalized pages.



Management Survey 2015

DAM renders and formats digital assets for a wide range of document types and channels

Organizations are taking a mobile-first approach when providing customers with content, and this is especially true for retailers. Geo-location capabilities built into WEM/CX systems identify the location of a site visitor if they are using a mobile device. This allows extremely granular, personalized content to be targeted at visitors, which means that digital assets not only need to be accessed on-the-fly to help build relevant content, but they must also be rendered into the appropriate format for the device they are being viewed on.

Retailers also realize that while mobile devices may now be the most commonly used device to access web content, it is important to support other form factors for viewing web content. Figure 11 below shows the importance to retailers of being able to view digital assets on any device. DAM systems have been designed to support a wide range of formats and resolutions. In addition, auto-sizing capabilities allow images to automatically fit the space assigned to them on the web page.



Figure 11: The importance of being able to view assets on any device, 2015

Source: Ovum's Making the case for Digital Asset Management Survey 2015

Retailers will also need catalogs, which can be managed in the DAM system. They will combine text and images, but the content may need to be repurposed for different markets. For example, different prices may be applicable to different types of customer. They will also need to be translated into different languages. Catalogs may need to be printed as well as being distributed and used via electronic channels. An electronic version may include hyperlinks, while the print version will have references. A DAM system allows multiple versions of assets to co-exist.

Retailers may also want to create a variety of other types of content such as flyers, brochures, and loyalty vouchers that will also need to be delivered via multiple channels in a variety of formats. A brochure may be printed, it may be sent as an attachment via email, or it may be available on a website.

Although the content in each version may be identical, the resolution, size, and format of the digital assets will be different, meaning that the assets need to be rendered and reformatted for each channel that these materials are delivered through. The Ovum survey highlighted that retailers regard the ability to store assets such as flyers, catalogs, and other types of digital assets combining text and images in a DAM system as being important as seen in figure 12 below.



Figure 12: The importance of storing documents such as catalogs and flyers in a DAM system, 2015

Source: Ovum's Making the case for Digital Asset Management Survey 2015

The use of digital assets can be time sensitive

One of the biggest headaches for any retailer is ensuring that assets are used at the appropriate time. Start dates can be assigned to new assets, meaning that they cannot be used until the appropriate time. Catalogs and other marketing collateral can also be time-sensitive with start and expiry dates. Managing different versions of assets is made easier by using the version control feature in DAM.

Table 3 below shows the major pain points faced by retailers. The retailers were asked to rank their three biggest pain points from the list in Table 3, with 1 being the most painful and 3 the least painful. The Total column refers to the total percentage of retailers that ranked each pain point in their top 3., All numbers are shown as percentages.

| | Total rank 1 | Total rank 2 | Total rank 3 | Total no in top 3 |
|---|--------------|--------------|--------------|----------------------|
| Ensuring assets are secure and not accessible by unauthorized users | 16 | 14 | 9 | 38 |
| Ensuring that an assets is of the appropriate resolution for various channels (web, social media, mobile, tablet) | 14 | 9 | 14 | 37 |
| Ensuring that the correct version of an asset is used | 11 | 14 | 8 | 33 |
| Digital rights management | 13 | 8 | 11 | 32 |
| Multiple, unmanaged versions of the same image | 8 | 11 | 11 | 30 |
| Searching for assets | 8 | 12 | 8 | 28 |
| Sharing files with external marketing agencies and other stakeholders | 9 | 10 | 9 | 28 |
| Different people working on the same image simultaneously | 6 | 7 | 13 | 26 |
| Resizing assets to fit the space available (e.g. in a layout) | 6 | 7 | 10 | 26 |
| Sharing with colleagues and external partners (workflow) | 7 | 8 | 7 | 22 |

Table 3: Major pain points faced by retailers (all figures are in percentages), 2015

Source: Ovum's Making the case for Digital Asset Management Survey 2015

Every one of the pain points above can be resolved by using a DAM system.

Access rights and permissions ensure that unauthorized users are not able to access digital assets. Assets can be rendered into the appropriate format, resolution, and size for the channel they are being delivered to. Version control ensures that the correct version of an asset is used, and there are not multiple unmanaged versions of the same asset. While digital rights management is a feature that not all DAM systems have, users do have a degree of control over assets by using access rights and permissions and by applying license information in the metadata.

Integration with a separate digital rights management system may be required to control the actions that can be taken on content, such as audio files or video. The search capability built into DAM systems makes searching for assets a simple and speedy process.

DAM offers flexible deployment options

On-premises, SaaS, and hybrid models are available

- Organizations have a choice between on-premises, cloud, or hybrid options.
- The major advantages of the cloud are that there is no hardware requirement on the part of an organization, and the implementation is fully managed, although the product will still need to be set up and may need to be customized to address specific requirements.
- 80% of respondents believe it to be very important or important that the DAM solution is on-premises, 84% regard a SaaS-based DAM to be very important or important, with a further 84% feeling that a combination of both is preferable.
- Having a highly scalable solution is most important to retailers, closely followed by high availability features.
- A SaaS solution provides a highly scalable architecture with high availability, clustering, and built-in redundancy.

Inhibitors to DAM systems, according to the Ovum survey, are factors such as a need to integrate with other systems, being complex to implement, and too expensive and not cost effective enough. Less important are a lack of internal skills to implement and run the system. But these factors need not deter retailers from using a DAM system. There is now much more flexibility around the deployment models available than there were a few years ago. Organizations have a choice between on-premises, cloud, or hybrid options. Table 4 below shows the inhibitors to implementing DAM. The retailers were asked to list their top 3 inhibitors in order of importance, with 1 being the most important and 3 the least important. The Total column refers to the total percentage of retailers that placed each inhibitor in their top 3.

| | Total rank 1 | Total rank 2 | Total rank 3 | Total no in top 3 |
|---|--------------|--------------|--------------|----------------------|
| Need to integrate with other business systems | 21 | 14 | 16 | 50 |
| Complex to implement | 17 | 13 | 16 | 45 |
| Too expensive/not cost-effective | 14 | 14 | 16 | 43 |
| Already storing digital assets in other systems | 15 | 12 | 14 | 41 |
| Too much customisation required | 10 | 12 | 12 | 34 |
| Requires too much new hardware | 9 | 15 | 10 | 34 |
| Does not have the internal skills required to implement | 7 | 11 | 9 | 27 |
| Do not have the internal skills required to administer the system | 8 | 9 | 8 | 26 |

Table 4: Inhibitors to implementing DAM (all figures are in percentages), 2015

Source: Ovum's Making the case for Digital Asset Management Survey 2015 However, there is some confusion amongst retailers over their understanding of DAM in the cloud, which may lead some retailers to believing they are already running a cloud system when in fact they are not. Figure 13 below shows what retailers believe constitutes cloud-based DAM.



Management Survey 2015

DAM in the Cloud overcomes the inhibitors to DAM implementations

SaaS-based DAM allows organizations to store, retrieve, and share digital assets via a web browser. The SaaS model takes advantage of technologies such as service oriented architectures (SOAs), virtualization, continuous data protection, faster delivery speeds, wider bandwidth, and larger capacity servers and storage devices, which have improved the service model. Most providers offer multitenancy, which means that multiple organizations including internal departments and global subsidiaries can use the same application instance.

This reduces the costs for the service providers and allows them to offer more favorable prices for customers, but it decreases the flexibility and opportunities for customization of the product for organizations. This could have repercussions if the organization is deploying an on-premises solution alongside the hosted one where the functionality needs to be identical in both versions. However, there is often an option to have a single instance of the application – for a premium.

The major advantages of the cloud are that there is no hardware requirement on the part of an organization, and the implementation is fully managed, although the product will still need to be set up and may need to be customized to address specific requirements. However, most DAM vendors are able to provide support to help with the deployment, either directly or via partners. Another benefit is that it is a fully managed system, with organizations benefiting from updates as soon as they are released.

Table 5 below shows the importance of architecture features to the retailers who took part in the survey. Most of these features can be addressed by implementing a SaaS solution, without upfront cost to the retailer. Although 80% of respondents believe it to be very important or important that the DAM solution is on-premises, 84% regard a SaaS-based DAM to be very important or important, with a further 84% feeling that a combination of both is preferable. This indicates that there are concerns among retailers about storing all of their digital assets in the cloud. However, the cloud can be more secure than internally run systems if the host encrypts data in transit and at rest, with the customer retaining the encryption keys.

| | | | ,,, | |
|------------------------------------|----------------|-----------|---------------|--------------------|
| | Very important | Important | Not important | Least important |
| Highly scalable DAM solution | 50 | 34 | 8 | 8 |
| Built in high availability | 46 | 44 | 8 | 2 |
| The solution is on-premise | 42 | 38 | 16 | 4 |
| Combination of on-premise and SaaS | 39 | 45 | 10 | 6 |
| The solution is SaaS | 37 | 47 | 11 | 5 |
| Ability to cluster the solution | 34 | 51 | 10 | 5 |
| Built in redundancy | 31 | 50 | 14 | 6 |

Table 5: The importance of architecture features (all figures are in percentages), 2015

Source: Ovum's Making the case for Digital Asset Management Survey 2015

Having a highly scalable solution is most important to retailers, closely followed by high availability features. A problem for organizations with an on-premises system is the constant need to add extra storage as the repository grows. This can result in a high level of underutilization, particularly when redundancy is built in. A SaaS solution provides a highly scalable architecture with high availability, clustering, and built-in redundancy. It will also store multiple copies of the repository in different data centers to ensure availability as well as enabling disaster recovery.

Another important factor that needs to be taken into consideration is that digital assets need to be protected with backups which should be supplied by the service provider. Data sovereignty requirements may also dictate where, geographically, assets need to be stored, although this is less likely to be an issue with digital assets than other types of data.

Although a cloud model may be preferable in terms of manageability, there may be concerns at trusting certain types of assets to the cloud. In these circumstances a hybrid model may be preferable, where some assets are stored internally, while others are stored in the cloud. This will require running the software on-premises as well as in the cloud, but it does offer flexibility as assets can be moved between the cloud and on-premises. Hybrid clouds are also defined as the integration of private clouds with public ones. Public cloud vendors offer a variety of hybrid options to meet various requirements in areas such are security or performance, but retailers that feel that this is not secure enough may opt to run a private cloud on top of a public cloud.

WoodWing Software

Vendor Profile

WoodWing Software, founded in 2000, has its headquarters in Zaandam, The Netherlands, and has regional sales offices in Europe, the Americas and Asia Pacific. The company is an expert in communication and publishing process efficiency. WoodWing develops and markets premier, cost-efficient workflow systems for content creation and analytics as well as for digital asset management. Its solutions are used by well-known <u>brands</u>, <u>agencies and publishers</u> worldwide to streamline content processes and to achieve their goals for quality, economy and time to market. Customers are served locally by over 80 selected <u>partners</u> in more than 100 countries. WoodWing's long-standing relationship with Adobe as a Technology Partner and its close cooperation with a large number of other technology vendors worldwide, confirm WoodWing's position as one of the leading suppliers of publishing software. WoodWing is a privately owned company. Additional information regarding WoodWing's products and services can be found at <u>www.woodwing.com</u>.

Elvis DAM

Elvis DAM enables users to manage rich media files of virtually any format. Its ease of use means that extensive training is not required to use the product. Users are able to search, browse, preview and share digital assets with a choice of web, mobile, or desktop clients. Its extensive search capabilities leveraging a database approach based on Elasticsearch include the use of facets to refine searches.

Assets can be added to the repository by drag-and-drop. Additional metadata can be attached to assets as they are imported into the system, with support provided for all major metadata standards. A sample taxonomy is provided out-of-the-box, but organizations can also create their own taxonomy. Using the lightweight previews the most appropriate item can easily be selected. Assets are organized in folders, and can be arranged into collections, which are virtual containers that can be used to organize groups of assets. Users are able to share links to allow colleagues to view collections and collaborate on assets. Relations provide an alternative view of assets, and they can be applied manually as well as automatically inherited through import, archive, or check-in processes. Elvis has powerful tools to share, comment and approve on work in progress on any device.

Users are able to open files straight from the Elvis client in any application including the applications of the Adobe Creative Cloud, Microsoft Office, Keynote, video tools, and more.

Thanks to the open architecture and support for open standards, the system can be integrated with practically all business applications. Due to the cluster architecture and the use of Elasticsearch, Elvis offers virtually unlimited scalability – the company says that Elvis enables the efficient management of up to 1 billion assets.

Elvis is available as an on-premises application and as a SaaS, subscription-based offering. The cloud version is hosted on Amazon S3.

More information on Elvis is available here.

Appendix

Methodology

This white paper was sponsored by WoodWing and includes results from an extensive primary research survey comprising responses of 250 senior IT decision makers and C-level directors in the retail industry (125 each from the US and the UK) having significant influence over the use of systems to manage digital assets. The views expressed in this white paper are based on Ovum's ongoing research into the digital asset management market, which takes into account the opinions of vendors and retailers.

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