cape.io

PROPRIETARY RESEARCH · EDITION ONE · 2026

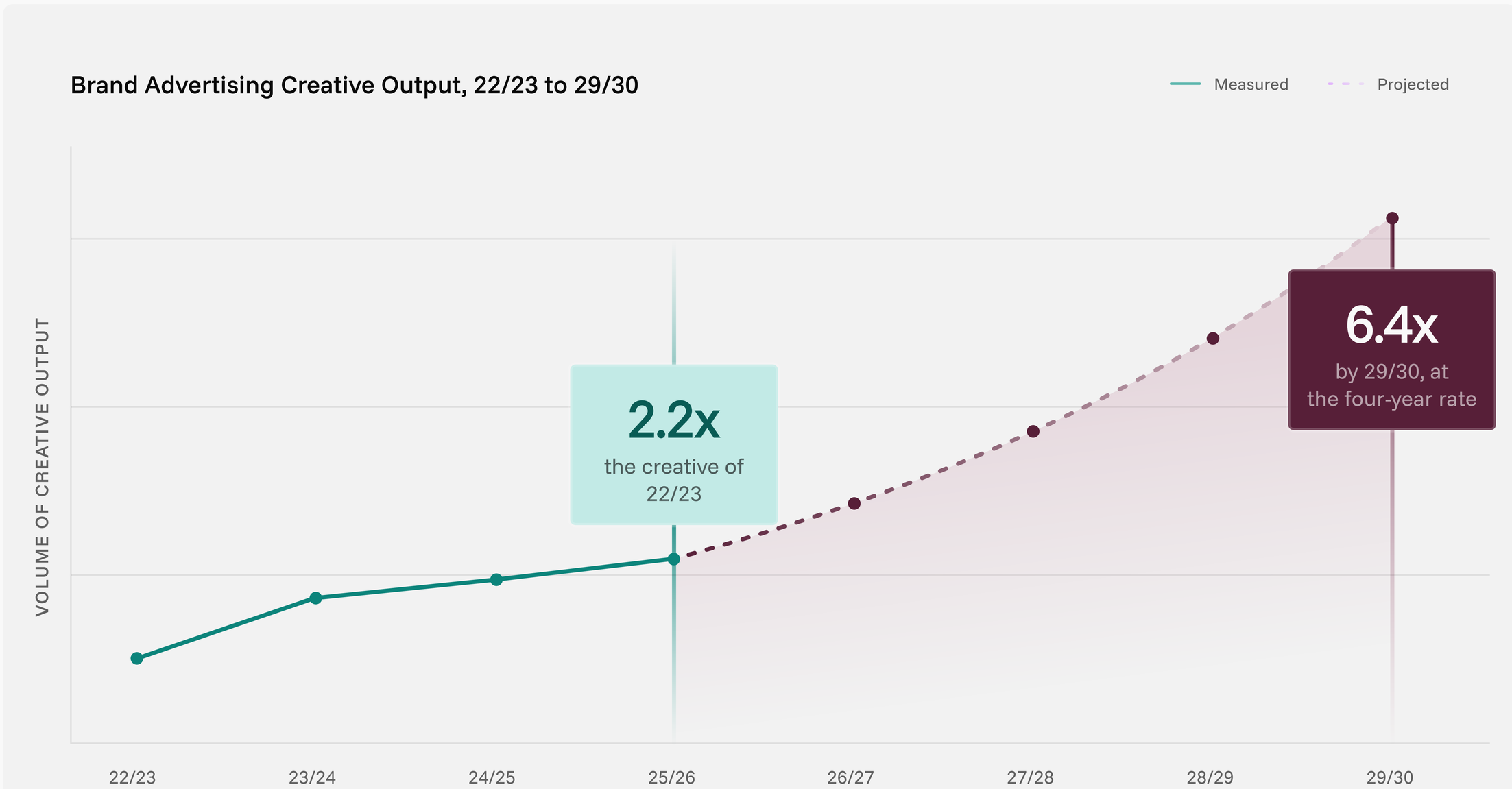
The Creative Burden Index 2026.

An analysis of the true cost of advertising creative demands on brands

Proprietary research from 700,000+ creative files, 215,000 distinct variations and 54,000 campaigns, 2022–2026.

The Creative Burden is real.

Four years of production data, 22/23 to 25/26. Campaigns grew by less than half. Marketing teams grew by a few per cent a year. Creative output more than doubled.



Global brands on the Cape.io platform, years to August. Measured to 25/26. Projected 26/27 to 29/30 at 30% a year, the compound growth across the four index years.

22/23 → 25/26

+44%	10 → 16	3 → 3.5	3.9x	3.4x
more campaigns	files per campaign	formats per message	static image output	video output

Audiences are increasingly smarter about being advertised to. Platforms are increasingly smarter about audiences.

Every scroll, pause and skip is a signal, and the platforms analyse all of them and then keep changing what they ask of advertisers – more formats, more ratios, more versions, served by the algorithm to whoever is most likely to respond. To keep an ad performing, a brand has to feed it. **That is a significant reason behind why creative has doubled since 22/23, while campaigns and teams have not.**

Cape.io's inaugural Creative Burden Index measures that load for the first time, using four years of production data from the Cape.io platform. The typical brand now produces 2.2 times the creative files it did three years ago. Its campaign count grew 44% and the files inside each campaign grew 54%, all while marketing teams grew by only 2.5–5.5% a year.

By following that growth trajectory into the future, we see a burden that increasingly becomes unsustainable. This report shows where the burden came from, where it's heading, and what brands can do about it.

MARKET VOICE

74% of CMOs agree "more assets doesn't always mean more impact".

Dentsu Creative 2026 CMO Report

BEHIND THE NUMBERS

A 'creative output' is every file a brand produces for a message, across every format, size and language.

Why is this happening?

1

Audiences want more, everywhere

People don’t want to be advertised at. They want to be recognised, and they switch off the moment they see the same ad twice. Their attention is spread across more channels than ever, and every scroll, pause and skip leaves a signal.

2

Platforms are watching

Those signals add up to more behavioural data than ever before. Platforms read it in real time and learn what keeps an ad performing as audiences shift: which format, which ratio, which version, for which person.

3

Platforms change the rules

They turn what they learn into algorithm and product updates. Almost every update asks advertisers for more: more formats, more ratios, more versions, all framed as the price of performance.

4

Brands make more creative

Brands produce more to keep up. Not to grow, but to hold the results they already had. More versions reach more people in more places. Audiences see them, adjust, and the loop turns again.

Audiences move.
Platforms follow.
Brands pay the bill.

MARKET VOICE

Companies now market across 10 channels on average.

Salesforce, State of Marketing, 10th edition

MARKET VOICE

85% of marketers say expectations among existing customers are rising.

Salesforce, State of Marketing, 10th edition

MARKET VOICE

The two biggest social media challenges: keeping up with new trends (32%) and with changing features and algorithm updates (30%).

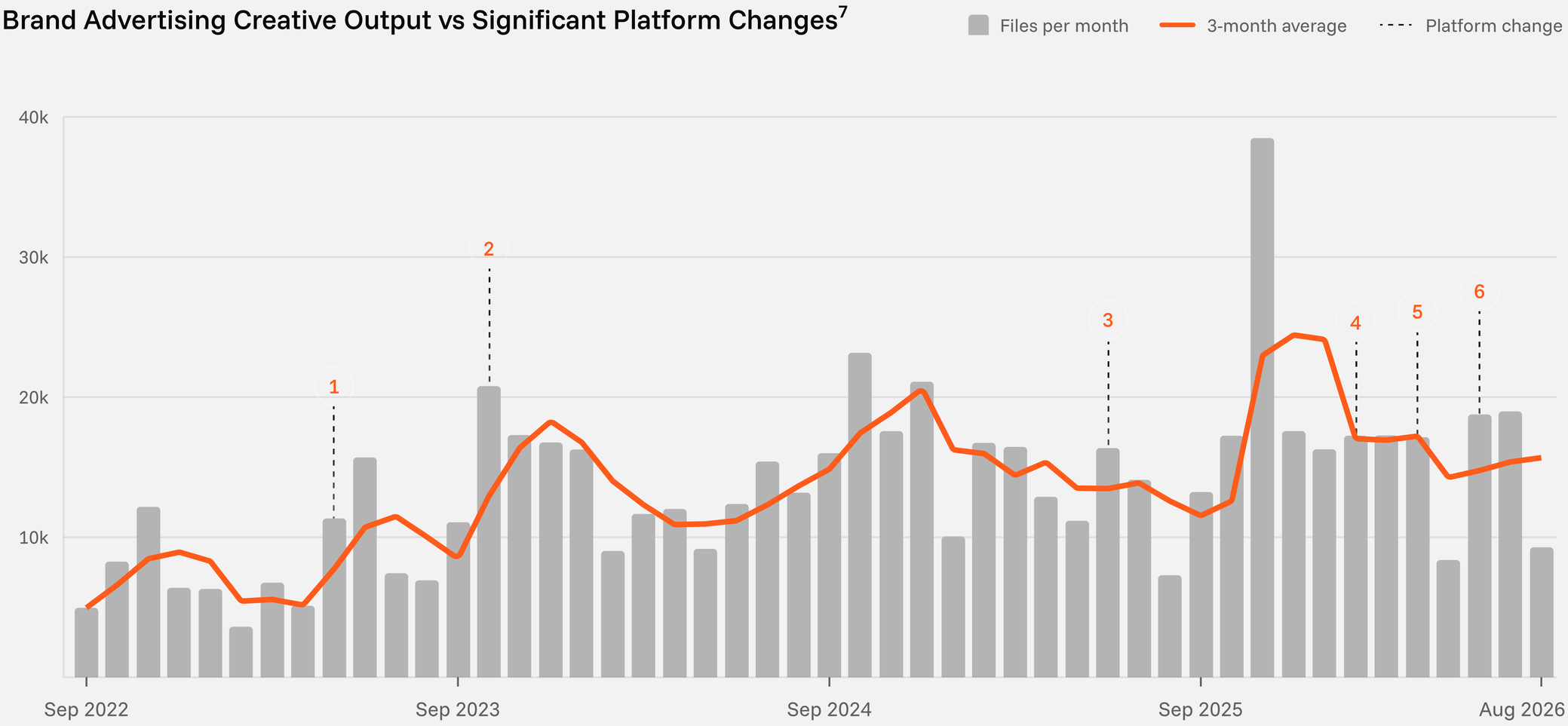
HubSpot, State of Marketing 2026

→ Turn the page for the dates. Six platform changes in four years, and each one asked for more.

Six changes in four years. Every one asked for more.

Over the last four years, leading ad platforms have made six pivotal changes requiring advertisers to increase the amount of ad formats and variations supplied. Brands have had no choice but to meet this need in order to keep up with the platforms' optimisation best practices for optimal results.

Brand Advertising Creative Output vs Significant Platform Changes[7]



1 May 2023 – Google Ads blog

Shorts join YouTube Video Reach Campaigns

A vertical video of 60 seconds or less now sits alongside every other asset.

2 Oct 2023 – Google Ads Help

Google Demand Gen rolls out to all advertisers

Short-form video, carousels, portrait and square images, across YouTube, Shorts, Discover and Gmail.

3 Jun 2025 – Meta for Developers

Meta unifies the Advantage+ campaign experience

No more choosing between an Advantage+ Shopping campaign and a manual one. Automated placements become the default.

4 Feb 2026 – Meta for Developers

Advantage+ becomes the default for Sales, Leads and App

Legacy campaign APIs are deprecated, with remaining campaigns to be migrated during 2026.

5 Apr 2026 – Google Ads Help

Video Action campaigns finish moving into Demand Gen

New Video Action campaigns ended in April 2025. Automatic upgrades ran from July 2025.

6 Jun 2026 – Google Ads Help

Display begins moving into Demand Gen

After the rollout, new Display campaigns can only be created inside Demand Gen.

MARKET VOICE

Dentsu forecasts that 71.6% of global advertising spend will be algorithm-driven in 2026.

Dentsu, Global Ad Spend Forecasts, December 2025

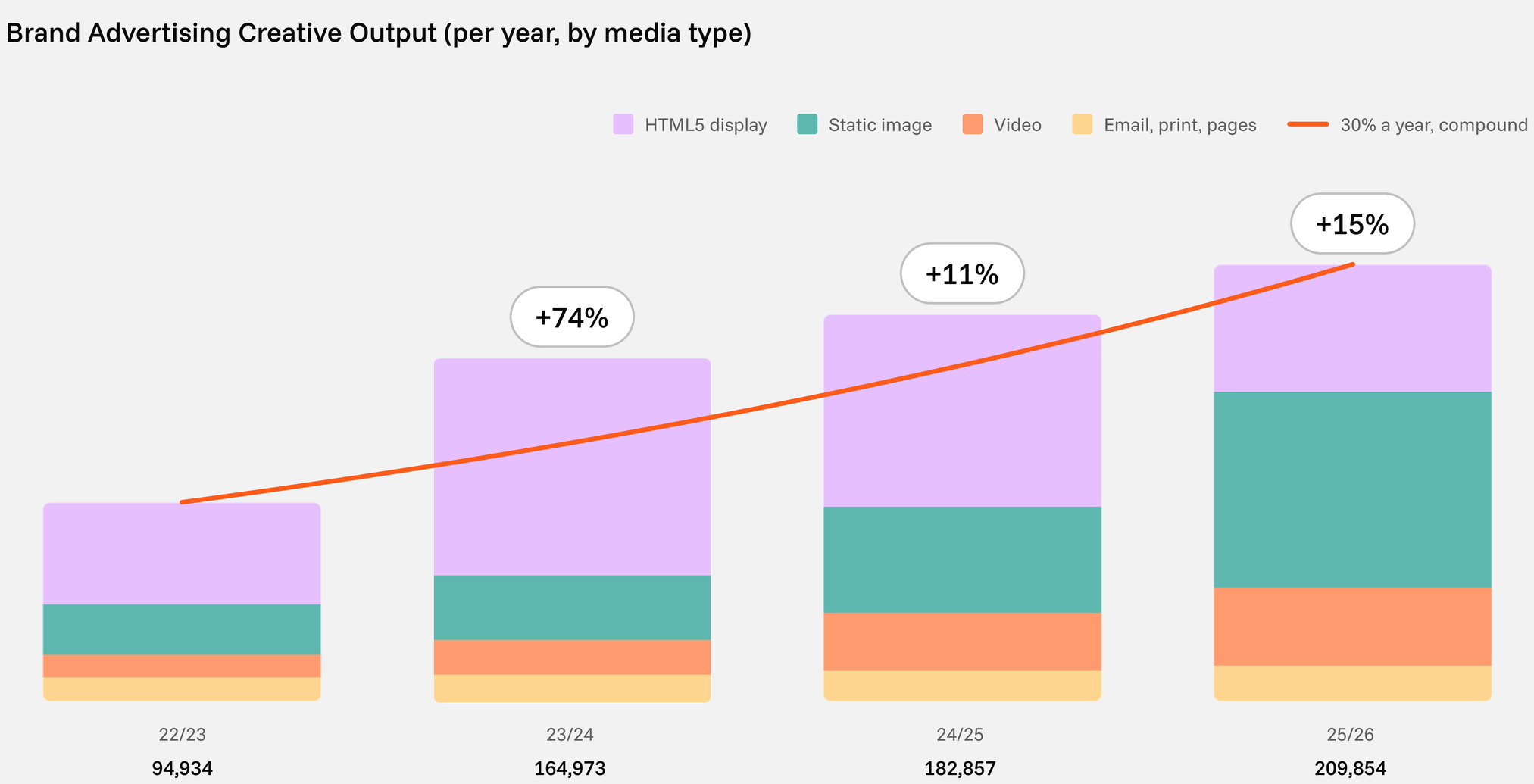
BEHIND THE NUMBERS

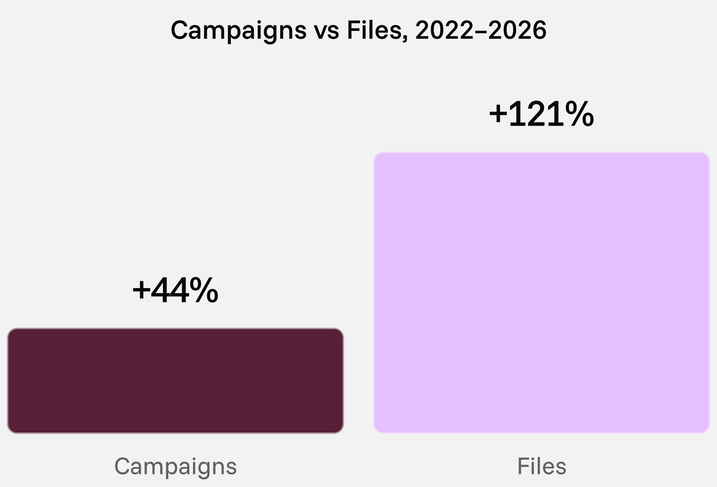
The chart shows when the platform changes occurred, but doesn't reveal an immediate impact on variation volumes. Instead, we see the impact hit several months later as brands respond and then stabilise or rationalise to accommodate.

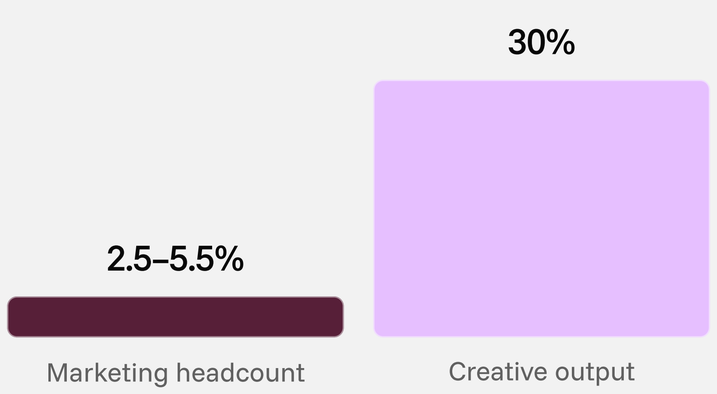
WHAT THIS MEANS FOR YOU

You don't get to choose the formats that suit you best because you must meet the platform requirements. What you do get to choose is your production process.

Same team. Twice the files.







5.5–12X FASTER

Headcount: The CMO Survey, 2026.

Since 2022, the number of campaigns grew by 44%. The number of files inside them rose by 121%. That gap is the Creative Burden that brands now find themselves under.

The same campaigns now need more sizes, more ratios and more media types, with the team that made ten files per campaign in 22/23 now making sixteen today. While the biggest jump in creative output occurred between 22/23 and 23/24, the burden is still increasing year on year. Over the past four years, this growth trend has averaged 30% year on year.

Compare that against the people making the creative and the contrast becomes distinct. Marketing headcount only grew between 2.5% and 5.5% a year over the same period.[5] The work is compounding at 5.5 to 12 times the rate of the teams producing it, with no signs indicating that this is likely to change.

BEHIND THE NUMBERS

'Files' is total creative output for the year. Files per campaign divides that by the number of campaigns in the same year.

WHAT THIS MEANS FOR YOU

If your campaign count feels flat but your team feels flattened, this is why.

MARKET VOICE

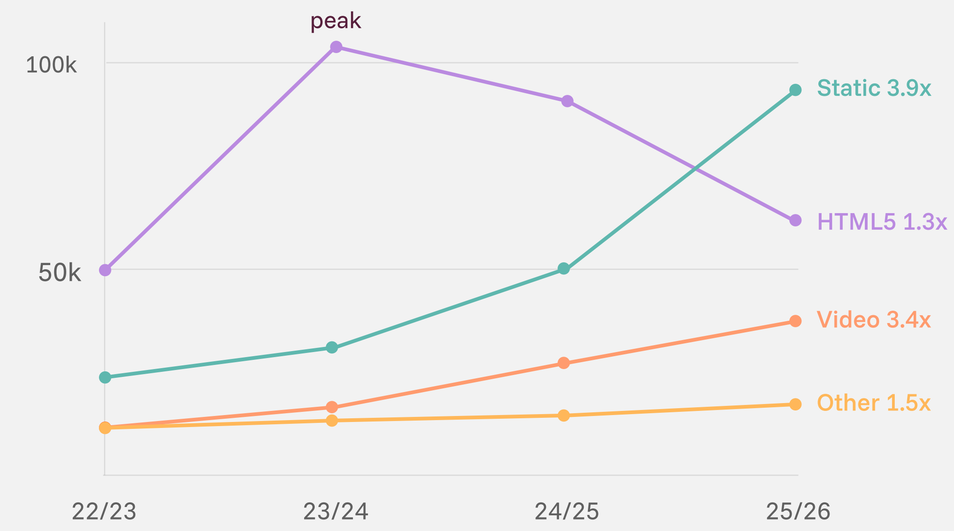
"With a 93% surge in content needs, teams struggle to produce enough high-quality, channel-specific assets at scale."

"Content demand has outpaced human production capacity. As personalisation across channels has exploded, marketing teams and budgets have not grown at the same rate."

Deloitte, Digital Marketing Trends 2026

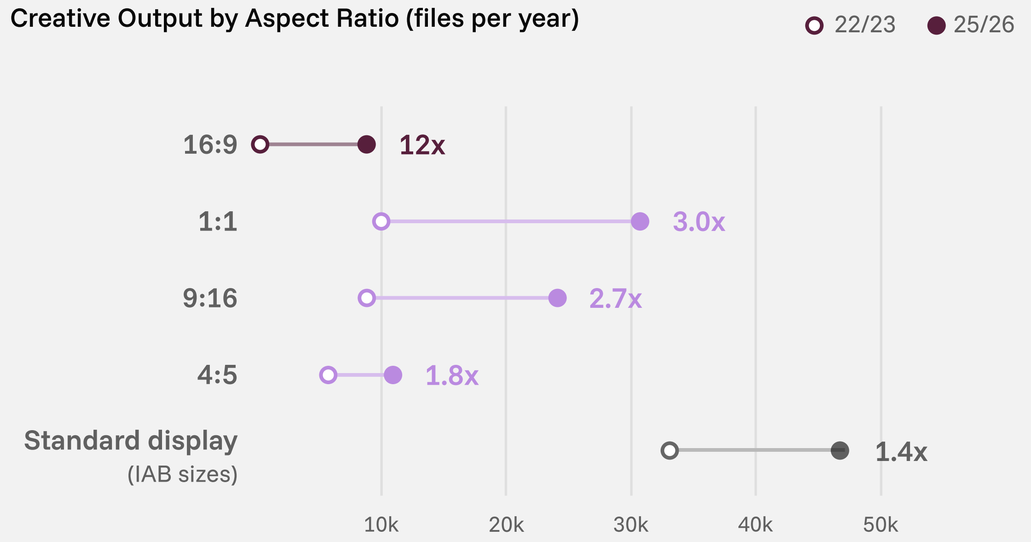
More sizes, more ratios, more versions of everything.

Brand Advertising Creative Output (per year, by media type)



Static image overtook HTML5 display in 25/26. HTML5 peaked in 23/24 and has fallen 41% since.

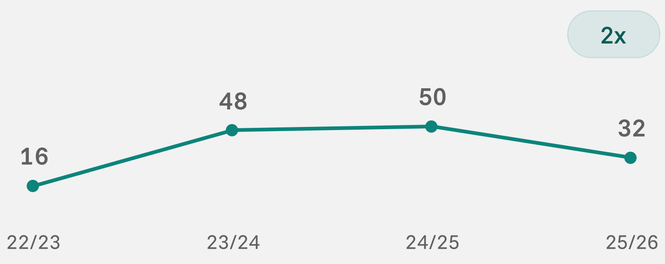
Creative Output by Aspect Ratio (files per year)



Social and video ratios together: 31% of output in 22/23, 41% in 25/26. Standard display sizes grew least. The five most common ratio groups are shown.

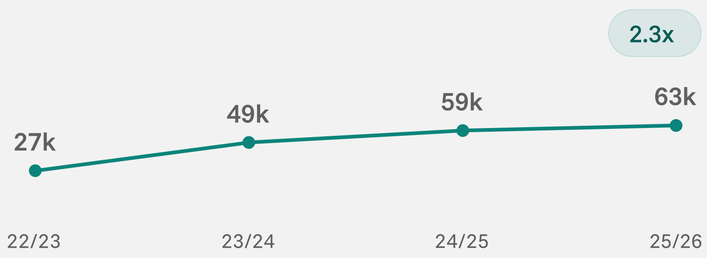
HOW THE LOAD BUILT, YEAR BY YEAR

Distinct formats, typical brand



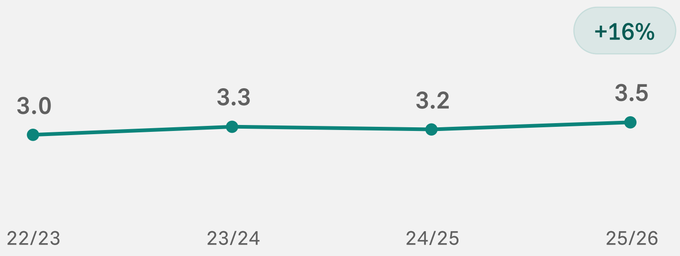
Brands went wide first, then standardised. 25/26 still carries twice the 22/23 demand.

Distinct messages, all brands



Variations have more than doubled, and are still rising.

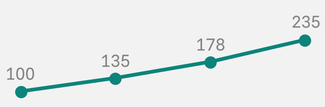
Formats per message



Every message is now produced in half a format more than it did.

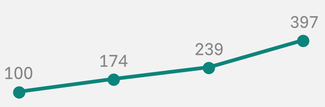
Creative Burden growth by sector, 2022-2026

2.4x
Travel



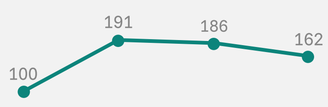
Many markets, many languages. Steady climb every year.

4.0x
Telecom and media



The fastest growth, with the big step in 25/26.

1.6x
Consumer and services



The largest base. Nearly doubled in one early step, then eased.

Campaigns, messages, formats and versions all grew between 2022 and 2026. However, one took the prize for the most extreme growth.

Campaigns grew by less than half. The messages inside them doubled, and each message now goes live in slightly more formats than it did. The extreme growth can be seen in versions: more messages per campaign, more formats per message, more sizes per format.

Static image is now the largest media type, at 3.9 times its 2022 volume, with video at 3.4 times. HTML5 display, once more than half of all output, peaked in 2024 and has fallen 41% since. Every ratio the platforms now ask for by default grew faster than standard display. 1:1 is the biggest social format, 16:9 output grew twelve-fold from almost nothing, and the standard display sizes grew least, at 39%.

The typical brand went wide first, trying around 50 distinct formats in 24/25 before settling on 32, still twice its 22/23 set. Sectors took different routes to the same place: travel climbed steadily, telecom and media jumped in the last year, and consumer brands nearly doubled early and have eased since. And new sizes keep arriving from nowhere: the 1200 by 1200 square barely existed in 22/23 and is now one of the most produced sizes in the cohort.

MARKET VOICE

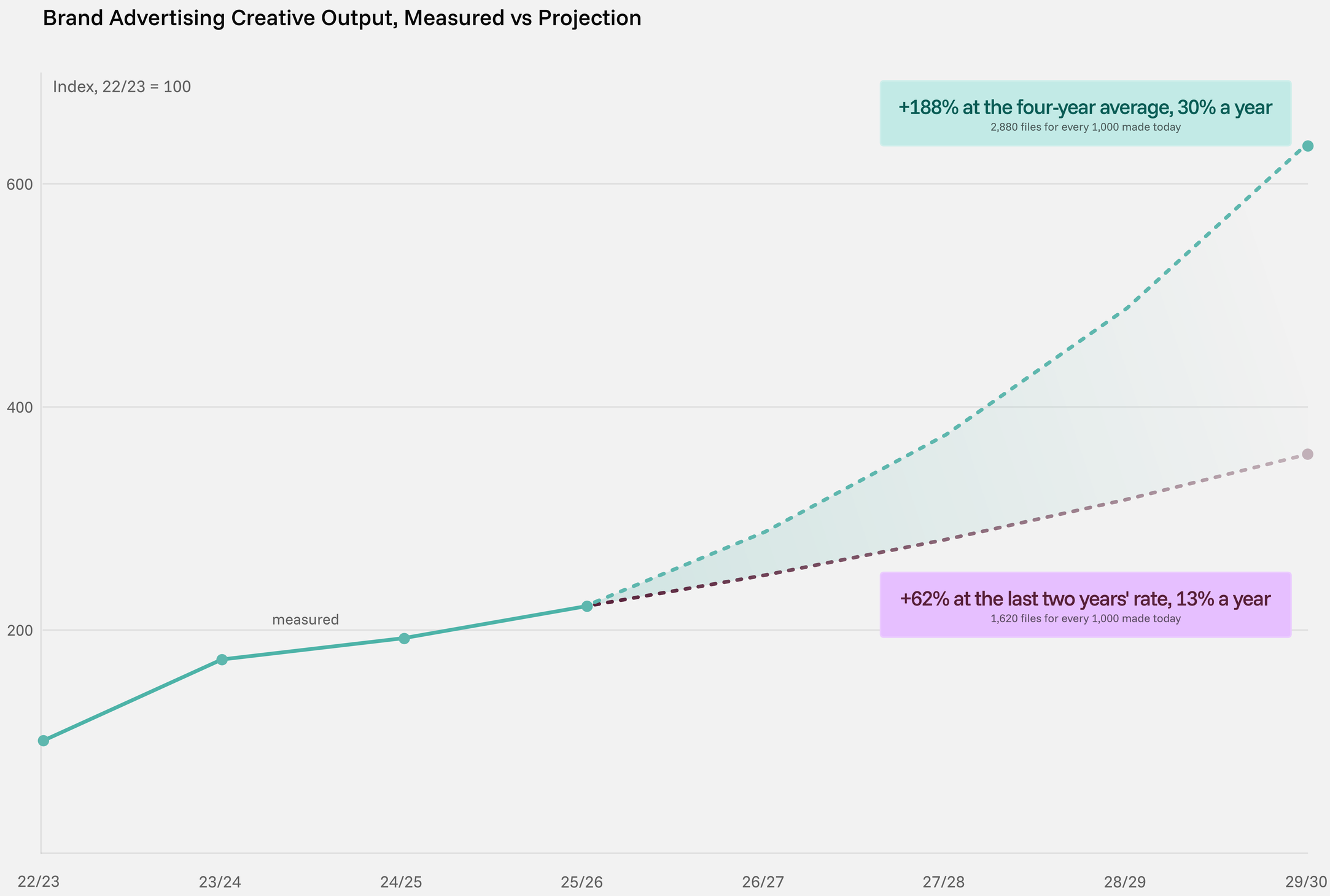
78% of marketers say they need more personalised content than they are currently able to produce.

Salesforce, State of Marketing, 10th edition

WHAT THIS MEANS FOR YOU

Wondering where your team’s hours have been going? Start counting your formats instead of your campaigns.

Follow the line. It doesn't flatten.



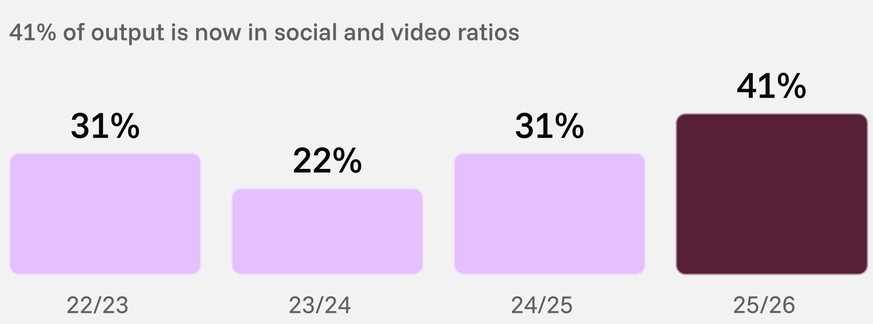
Modelled on the cohort's own growth. We may not be able to predict the next platform change, but what we do know is that more change is always on the horizon.

This Creative Burden Index reveals two insight periods.

It measures the state of play over the past four years, and allows us to show the direction of travel for the next four. The last four years explain how the burden arrived, while the next four tell you what to plan for. The lower line carries forward the conservative growth rate of the last two years, 13% a year.

The upper line carries forward the four-year average, 30% a year, which includes the step change of 23/24. The true growth trajectory could land anywhere between these two, or above them if the platforms adapt in more extreme ways to changing user behaviour.

Either way, the question isn't whether the creative load grows. It's how steep the slope will be and whether your production model is built for it.



Up from 31% in 22/23, with all of the gain in the last two years.

MARKET VOICE

81% of CMOs agree they will need to produce "far more" content going forward.

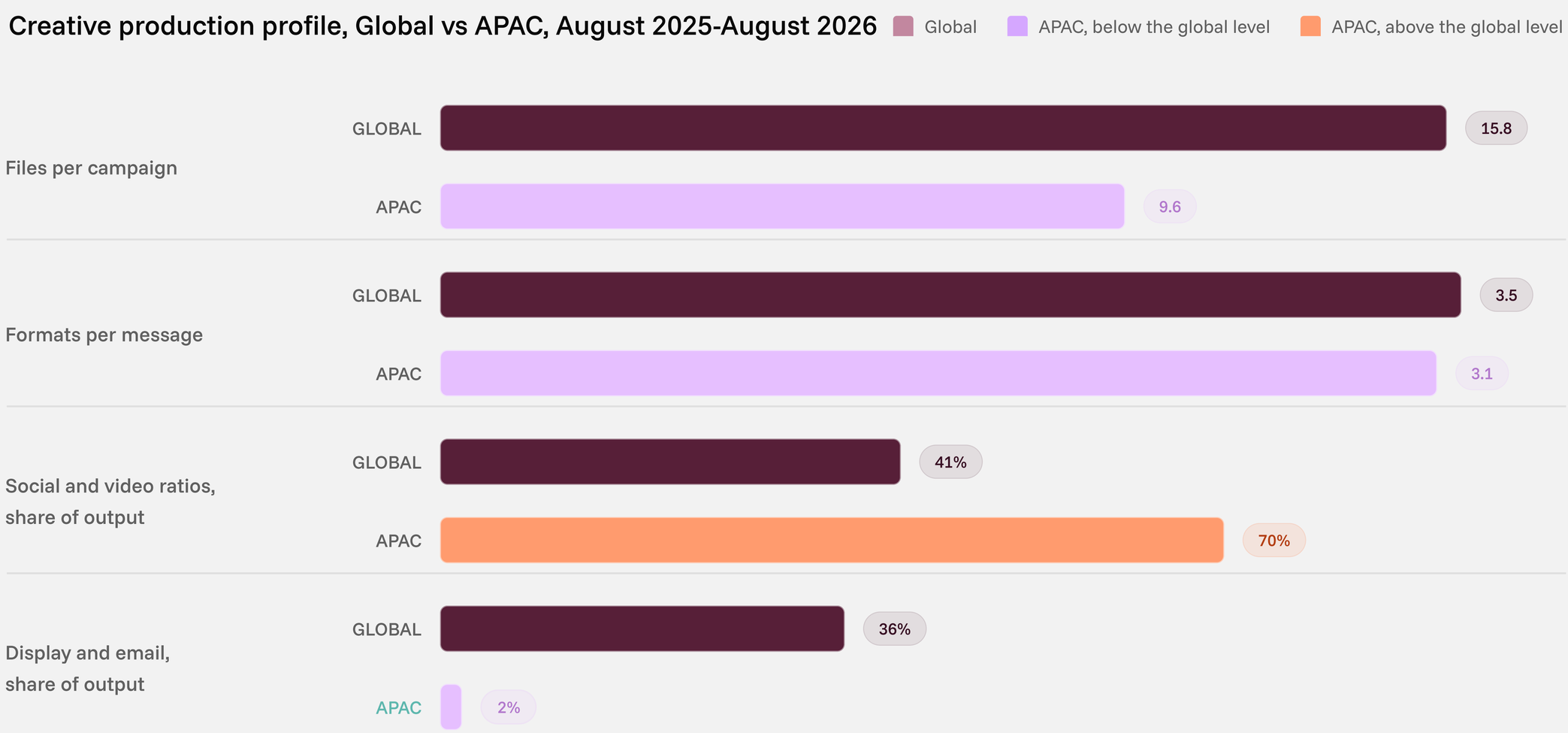
Dentsu Creative 2026 CMO Report

WHAT THIS MEANS FOR YOU

Plan production for 2030, not for 2026.

APAC against the 25/26 global baseline.

The index sets a global baseline. Here is where APAC production sits against it today, and where it lands if it follows the global trend.



LIGHTER BURDEN, FOR NOW

Fewer files per campaign. Fewer formats per message. Lower share of output for Display and Email. This lighter burden has more to do with market maturity than desire. APAC is catching up fast.

CONCENTRATED WHERE CHANGE IS FASTEST

70% of APAC output is in social and video ratios, the formats growing two to twelve times globally. Whatever the platforms change on social disproportionally affects APAC brands first.

MARKET VOICE

72% of businesses in Australia already use AI to personalise experiences and tailor messaging and content, 13 points above the global average.

Dentsu Creative 2026 CMO Report

BEHIND THE NUMBERS

APAC figures are the current-year profile against the global baseline. Catch-up estimates apply the global rate of change to APAC's current position.

At the global rate of change, APAC's production load per campaign reaches today's global level by 29/30, and its format load per message by 27/28.

Modelled on global rates of change applied to APAC's current position.

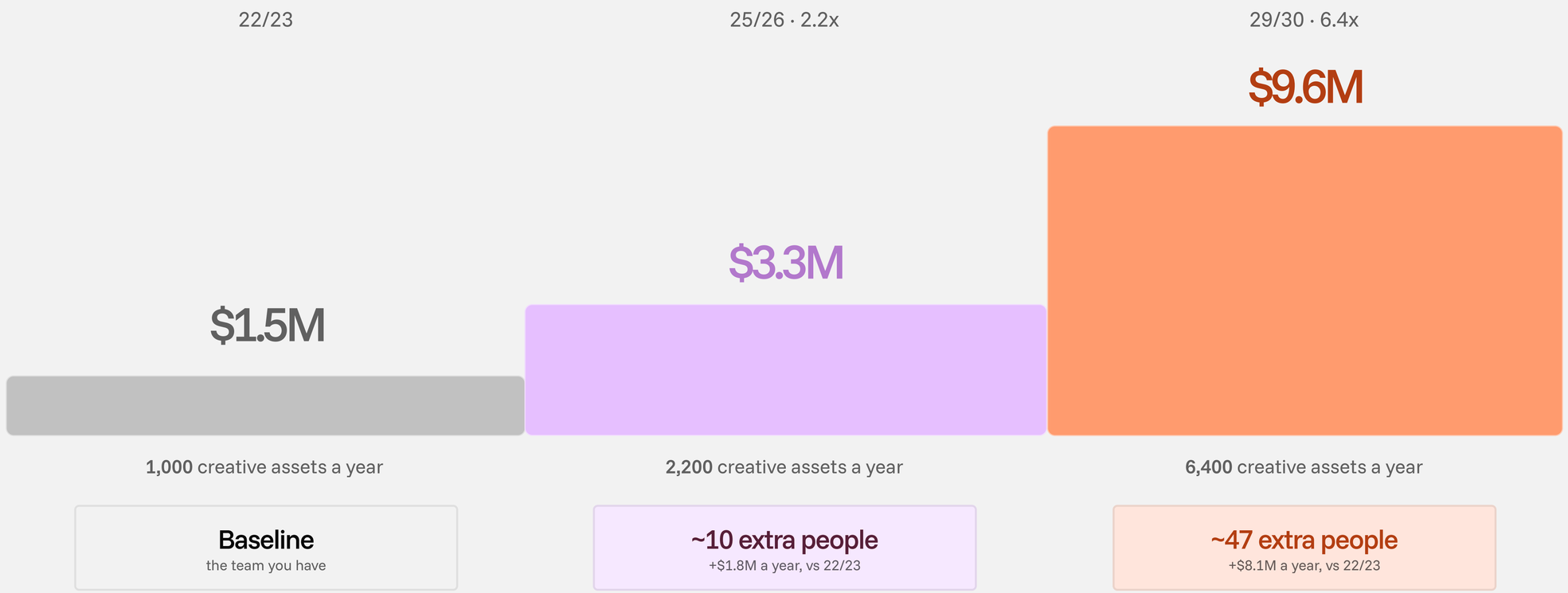
APAC brands lean hardest on the exact formats growing fastest everywhere else, and their appetite for personalisation is already above the global average. Personalisation demands more variations which puts even more pressure on brands to create more.

Based on the global rate of change, APAC has between two and four years until it catches up. The brands that will come out on top are those that choose to use these years to build a production model that's capable of dealing with the burden coming down the line.

It's not a talent problem.
It's a production problem.

What the Creative Burden costs a typical brand

Annual production cost, if nothing about how the work is made changes



Pressure breeds errors.

A variation that isn't right first time comes back for rework, and rework lands on the same team that was already behind. Stretched reviewers miss things. Creative that is off-brand, off-spec or off-regulation gets waved through accidentally, and the cost arrives later as a platform rejection, a compliance query or a scramble the night before launch. The usual fix is more people. Freelancers, an extra agency, a bigger studio. It works for a quarter. Then the next platform change lands and the queue is longer than before, because the load didn't grow by a fixed amount. It doubled, and it's still growing. Marketing teams aren’t short of talent. They’re short of a production model built for the volume the platforms now hand them.

MARKET VOICE

"Difficulty scaling quality control" ranks among the top five blockers of AI-driven personalisation.

30% of marketers using AI name "high-stakes errors" as a concern about AI in marketing.

Salesforce, State of Marketing, 10th edition

ONE BRAND'S OWN NUMBERS – AN ANECDOTAL EXAMPLE

One brand in the index saw a jump from 734 to 4,412 variations in two years. In resourcing alone, it was going to cost them $5.5M more a year. They knew they had to change *how* the work was produced.

WHAT THIS MEANS FOR YOU

Headcount can't close this gap. Your CFO already knows it.

ASSUMPTIONS

A brand making 1,000 creative assets in 22/23, grown at the index's measured rate to 25/26 and projected rate to 29/30 · 12.55 hours per asset creation lifecycle and $120 an hour, held at 22/23 levels on purpose · 30 hours of productive capacity per week · 48 weeks · illustrative

YOUR NUMBERS, NOT THE TYPICAL BRAND'S

What's your Creative Burden?

Book a session with the Cape.io team and we'll map your Creative Burden with you, showing where your assets multiply, how much of the work repeats and exactly how much time and money it's costing you.

Discover your Creative Burden →

So what should you do about it?

The answer isn't more hands. It's a different way of making the work. Media, email and measurement were automated years ago. Creative production is still done by hand, one file at a time, and the platforms have made that impossible to sustain. The fix is automation built for creative, not automation borrowed from somewhere else.

1 **Map the burden you have**

Trace one campaign from brief to live ad. Every handover, every file a person opens, every check done by eye. Most teams have never seen the whole chain in one place.

DO THIS › Run the calculator on page 9. Then walk one real campaign through the chain and list every step a person touches.

2 **Find the repetition**

Mark every step that is the same creative in another size, ratio, language or market. That is the automatable share, and in this index it is seven files in every ten. Then decide what one source means for you: one master, one set of rules, one library.

DO THIS › Rank the repeated steps by hours. The top three are your starting point, and your business case.

3 **Automate in the order that pays back fastest**

Start where the hours are. Add control before volume outruns it. Then connect the output to the channels.

DO THIS › Pick two workflows and automate them end to end in 90 days, with no manual steps left in.[3] Make them the top two from step 2.

A) OUTPUT
Every variation generated from the master and the rules. Where the hours go, so where they come back.

B) GOVERN
Brand, specs and compliance checked by the system before anything is published.

C) DELIVER
One flow into every channel, naming and tracking applied on the way.

D) LEARN
Performance feeds the next round. Fading creative is refreshed early.

WHAT IT LOOKS LIKE WHEN ALL THREE STEPS ARE DONE

Around 78% of production time saved locally, and up to 90% in other markets.

Cape.io client results

The next page shows what the three steps look like when they run on one platform.

From first creative to live media.

One connected platform that unites creative and media teams to plan, create, validate and activate across every channel. Campaigns have become too complex to manage manually. Humans define the strategy. Cape.io handles the complexity.

Three ways brands use Cape.io

Creative Automation

Produce, personalise, and launch high-performing ads for every channel: from social and display to video and DOOH.

- True omnichannel production: generate every asset from a single source of truth
- Build from intelligent, modular templates that guarantee brand consistency while enabling infinite variation
- One-click cross-channel activation: publish campaigns across more than 10 platforms at once
- Brand governance: ensure every ad is 100% on-brand and market-ready before it goes live

Advanced TV

Formerly Peach Connect: get control of your ad delivery and management across linear TV, CTV and digital video.

- Right files. Right format. Right where you need them
- Integrated with 18,000+ broadcasters and platforms
- No more hunt the specs: a maintained database of media owner and platform video file specs, with the files created for you
- Supports every aspect ratio and screen, including 1:1, 2:3, 16:9, 9:16 and 4:5

Validation

Automatically review ads against the latest rules, specs, safe zones, and more.

- Smarter checks. Fewer delays. Faster launches
- Compliance check: scan more than 32 rule types against regulations for the UK, USA, France, Australia, Germany and Italy
- 5x faster creative QA across linear, CTV, DSPs and ad servers, including safe zone checks
- Powered by AI, trained and tested by global compliance experts

The modules behind them

Creative Studio
Create and collaborate on high-quality, on-brand ads at scale, faster than ever.

Dynamic advertising
Automate hyper-personalised, data-driven campaigns with live content so every viewer sees what's most relevant.

Publishing
Simplify cross-channel campaign activation: launch smarter, faster, and at scale.

Campaign management
Simplify how you plan, build, and launch campaigns across every channel, team, and market.

Digital Asset Management
Unify your asset library with your campaign ops, enabling your team to move fast and stay on brand.

Campaign Analytics
Close the loop between creative production and multi-platform campaign performance.

CAPE.IO AT A GLANCE

110+
countries where leading brands trust Cape.io

18,000+
global destinations across social, display, CTV and linear TV

10+
platforms published to at once, from Meta and Google to display DSPs

32+
ad regulation rule types scanned automatically

NEXT STEP

See how Cape.io can ease your Creative Burden

Book your demo →

Chat with our Sydney or Singapore-based team to see exactly how Cape.io will automate your creative workflow.

Meta Business Partner. Google Partner. Offices in Sydney, Singapore, London, Amsterdam, Tilburg, Tokyo, Santiago and São Paulo.

How we built the index.

THE DATA BEHIND THE INDEX

700,000+	215,000	54,000	480+	60+	150+
creative files	distinct variations	campaigns	formats and sizes	language variants	markets

DEFINITIONS

The data	Cape.io platform data covering more than 700,000 creative files, 215,000 distinct creative variations and 54,000 campaigns across 480+ formats and sizes, 60+ language variants and 150+ markets, September 2022 to August 2026.
Variation	A distinct version of a message.
Campaign	A brief's worth of creative, produced and published together through the Cape.io platform, counted for each channel and media type it is produced for.
Creative output	Every file produced or uploaded for publishing through the Cape.io platform (variations x formats x languages), including its campaign designer. Format and ratio views use files produced on the platform, which carry size data.
Excluded	Test and template campaigns, and unchanged copies of earlier campaigns, which are counted once.
Years	September to August, written as 22/23 for September 2022 to August 2023. The index compares 22/23 with 25/26 for the brands with four full years of data on the platform. Brands that joined later appear in the APAC lens on page 8 and in the headline totals.
Privacy	Data is anonymised and aggregated. Sector views are broad groupings.
Actual vs modelled	Growth figures are actuals. The typical brand is the median. Projections and APAC catch-up estimates are modelled on the cohort's own rates and labelled as such wherever they appear.
Cost model	12.55 hours per creative file, $120 an hour, a 30-hour week and a 48-week year, with production time and cost per file held flat. Illustrative.

ADDITIONAL SOURCES

1 **Dentsu Creative, 2026 CMO Report: Making It Real**
1,950 senior marketers across 14 markets, April 2026

2 **Dentsu, Global Ad Spend Forecasts**
December 2025

3 **Deloitte Digital, Digital Marketing Trends 2026**
March 2026, drawing on the Deloitte CMO Survey 2025

4 **Salesforce, State of Marketing, 10th edition**
4,450 marketers across 26 countries, 2025

5 **The CMO Survey, 35th edition**
Duke University Fuqua School of Business, 308 US marketing leaders, 2026

6 **HubSpot, State of Marketing 2026**
1,505 marketers including Asia and Australia, 2025

7 **Platform timeline, primary sources**
Google Ads Help, Google Ads blog, Meta for Developers, PPC News Feed

cape.io

This is the first edition of The Creative Burden Index.

From 2027 we'll report how the creative load is tracking against the projections in these pages, and what the platforms changed in between.

Learn more about Cape.io

Book a demo