DIGITAL
The New Muse for Creatives
CREATIVE PULSE 2016
Asia-Pacific Survey by Adobe
The idea for a great creative concept or design can strike anytime, anywhere. At a café, on a flight, during a vacation, or right in the middle of a briefing meeting. There’s no saying when the synapses of a creative mind connect to send out a stellar creative idea! The good news is that you are in a great place now. These out-of-the-box ideas can be converted into great creatives through digital platforms that can be accessed anywhere, anytime.

What’s even better is that you have access to integrated tools that span the entire creative process, from concept, to creation, to production. We are at the threshold of a new creative environment built around connected assets that can be easily managed, shared and remixed to quickly produce great work. This work can then be seamlessly delivered across a captive audience of over 3.1 billion global consumers who have internet access.

Furthermore, customers today interact with brands through various channels and expect a relevant, compelling experience on each one and the pressure is high on creatives to meet these demands. Consumers’ increased expectations have brought us to a tipping point where experience must be at the centre of everything we do – customers want the best and they won’t tolerate bad experiences.

The playing field for design professionals has changed. They collaborate, have exposure to contemporary trends, refine design to suit individual requirements, create engaging designs and deliver campaigns within a really quick turnaround time. By expanding possibilities and automating a part of the creative process, professionals have become more creative and more productive. They bring to the table a great offering – design as a value differentiator.

Adobe is at the forefront of this changing creative environment, connecting assets and enabling collaborative work-flows so that creatives can quickly deliver consistent, quality experiences across multiple channels.
Creative Pulse – Understanding Creatives

Creative Pulse is a survey conducted by Adobe in the Asia-Pacific region. Through this survey, we aim to analyze the role played by technology in today’s fast changing digital marketplace. We look at opinions that shape current trends in the creative industry. This survey reports the challenges, skill requisites, inspiration and access to new platforms that creatives are faced with in the industry today.
Methodology

Survey included creative professionals from different types of organizations (corporate, government entity, agency) and across disciplines (web design, illustration, UI design, architecture).

Total creative professionals who took the survey:
1709

Survey period:
April 8 to July 20, 2016

Profile of Respondents

Country of Origin

- India: 208
- Australia and New Zealand: 244
- Korea: 234
- Southeast Asia: 220
- Greater China: 803

Gender

- Male: 61%
- Female: 39%
A majority of other respondents were creative professionals including App Developers, Creative Directors, Web Developers, Artists, Print Designers, Motion Graphics Designers and Interactive Designers.
Top Respondents across Regions

**APAC**
- 22% Graphic Designers
- 7% Web Designers
- 6% UX / UI Designers

**Australia and New Zealand**
- 30% Graphic Designers
- 14% Photographers

**Greater China**
- 23% Graphic Designers
- 8% Web Designers

**Korea**
- 18% Graphic Designers
- 13% Web Designers

**India**
- 18% Film Makers
- 13% UX / UI Designers

**Southeast Asia**
- 40% Graphic Designers
- 8% Advertising Professionals
Summary of Key Findings

More and more, creative design is playing a critical role in differentiating brands. The findings of this survey reflect how the creative industry is responding to new market demands and changing realities.
How creatives view the industry

Percentage who strongly agree / disagree

Across Asia-Pacific, a majority of the Creatives who participated in this survey recognize the growing importance of creativity and design to business. They also understand the importance of keeping themselves updated with new tools and technologies.

The impact of a multi-channel, multi-device world is being strongly felt as a majority of them are increasingly working across multiple mediums and disciplines.

With over 1.8 billion unique subscribers in the Asia-Pacific region and nearly 3.8 billion connections, mobile is the heart of the digital ecosystem and is creating new digital societies.

<table>
<thead>
<tr>
<th>Percentage who strongly agree / disagree</th>
<th>2016</th>
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</thead>
<tbody>
<tr>
<td>Design driven companies have a competitive advantage</td>
<td>80%</td>
</tr>
<tr>
<td>Technology is enabling creatives to be more in control of their professional destiny</td>
<td>83%</td>
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<tr>
<td>Mobile is transforming the face of creativity and design</td>
<td>87%</td>
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<tr>
<td>Creativity and design thinking are becoming more important to business</td>
<td>88%</td>
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<tr>
<td>Creatives will fall behind if they don’t stay current with changes in the industry</td>
<td>89%</td>
</tr>
<tr>
<td>Creatives are expected to learn new tools and techniques</td>
<td>92%</td>
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<tr>
<td>Creatives are increasingly working across multiple mediums and disciplines</td>
<td>94%</td>
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</table>
In the APAC region, we see a 6% rise in people who feel that they are having significantly more impact, since the last survey.

Creatives feel that they are having significantly more impact today, than two years ago.

- 56% I am having significantly more impact
- 34% I am having the same impact
- 10% I am having significantly less impact

In the APAC region, we see a 6% rise in people who feel that they are having significantly more impact, since the last survey.
Across the region, creatives are feeling the impact of rapid changes that their industry is undergoing, as they now have to keep up with new responsibilities added to the creative function. This has increased from 78% in 2014 to 90% in 2016.
Devices that creatives use to bring their ideas to life

Majority of the respondents across APAC currently prefer desktops and laptops over the rest. The findings indicate that smartphones and tablets are also fast catching up. However, a number of them continue to rely on traditional pen and paper.

- Desktop: 74%
- Laptop: 66%
- Pen and paper: 51%
- Smartphone: 49%
- iPad - Air or Pro: 27%
- Wacom style tablet: 21%
- Post-it notes: 18%
- Microsoft Surface Pro: 5%
The device that creatives would like to use more in the future

- iPad – Air or Pro: 22%
- Laptop: 21%
- Desktop: 21%
- Smartphone: 13%
- Wacom style tablet: 9%
- Pen and paper: 5%
- Microsoft Surface Pro: 5%
- Not Applicable: 3%

The overall APAC device usage percentages indicate that iPad-Air or Pro will be the preferred device in the future, followed closely by laptops. This indicates that creatives are keen to create content in a mobile and flexible environment.
What motivates creatives today

Creatives are explorers at heart and are keen to learn new things. This is their primary motivator. With all the creative inspiration, they are happiest when they see their ideas brought to life and they get to do great work. Creatives are also keen to master new technologies.

- Desire to learn new things: 72%
- Seeing their ideas brought to life in the real world: 59%
- Doing great work: 53%
- Mastering new technologies: 51%
- Knowing their work is having an impact on causes/social issues: 44%
- Financial rewards: 43%
- Knowing their work is having an impact on business: 42%
- Finding new solutions to design challenges: 41%
- Reaching a broad audience: 31%
- Prestigious awards and accolades: 27%
- Recognition from peers: 21%
- Recognition and advancement from my employer: 21%
- Recognition from family members: 15%
- Recognition from my mentors/teachers: 14%
Skills that creatives feel will be most “in-demand”

Majority of the respondents feel that over the next 12 months, UX / UI Design will be the most in-demand skill, followed by App Development and Digital Storytelling.

<table>
<thead>
<tr>
<th>Skill</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>UX/UI design</td>
<td>27%</td>
</tr>
<tr>
<td>App development</td>
<td>16%</td>
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<tr>
<td>Digital storytelling</td>
<td>11%</td>
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<tr>
<td>Web design</td>
<td>8%</td>
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<tr>
<td>3D modeling</td>
<td>7%</td>
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<tr>
<td>Motion graphics</td>
<td>7%</td>
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<tr>
<td>Graphic design</td>
<td>6%</td>
</tr>
<tr>
<td>Video editing</td>
<td>5%</td>
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<tr>
<td>Visual effects</td>
<td>4%</td>
</tr>
<tr>
<td>Animation</td>
<td>2%</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>2%</td>
</tr>
<tr>
<td>Photography</td>
<td>2%</td>
</tr>
<tr>
<td>Illustration</td>
<td>1%</td>
</tr>
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</table>
What creatives feel is the ultimate measure of success in today’s creative world

Ranked in order from 1, Most Important Factor, to 5, Least Important Factor

1. Business impact
2. Social media feedback and views
3. Recognition from peers
4. Industry awards
5. Personal financial success

Business impact is unanimously recognized by creatives as the ultimate measure of success. This is closely followed by social media feedback and views. Recognition from peers is ranked next after which industry awards play a significant role. Personal financial success is seen as the least important factor.
A majority of creatives across the region are concerned about their skill sets and the resources they have to succeed as a creative. This can be attributed to the increasing pressure they are facing, to constantly update their skills in an ever-evolving digital world.
How creatives feel about the role of digital analytics and metrics in creativity

I need to understand more about what analytics and metrics can do for me as a designer: 74%

I feel empowered by analytics and metrics: 27%

I feel threatened by analytics and metrics: 5%

The convergence of data and creative content implies that today we are relying more and more on technology to deliver more personalised experiences. Across the region, Creatives feel the need to better understand how analytics can help them.
The driving forces behind the changing role of creatives

New technologies that change how they do their work 63%
Challenge of “breaking through the noise” to reach target audiences 42%
The impact of social media on the creative industry 41%
New platforms for reaching their audience 39%
New responsibilities added to the design/creative function 38%
The speed in which they need to create for the client 27%
The use of consumer data and analytics to guide creative strategy 24%
The opportunity to crowd-source projects 7%

Creatives across the region feel that new technologies are changing the way they work. They are also feeling the high impact of social media. Overall, creatives understand that there are new platforms for reaching audiences, and new responsibilities added to the creative function.
Most influential sources of creative sparks and inspiration for the creative community

Films seem to be the greatest source of creative inspiration across APAC, followed by cultural imports from other countries.
Where creatives are finding creative inspiration

The most important source of creative inspiration in the APAC region are the various social media tools. This is followed by online creative communities which has seen an 18% increase since the previous survey. Online media has increased overall, while traditional media has reduced since the 2014 survey.

Social Media (Facebook, Twitter, etc.) 43%
Online Creative Communities (Behance, Dribble, etc.) 36%
Websites / Online 35%
TV Advertising 20%
Print and Magazine Advertising 20%
What's keeping creatives up at night

Losing inspiration and motivation is the primary reason that keeps creatives in the APAC region awake at night. In the digital world, the pressure of delivering more creative ideas and the demand to deliver content faster is yet another reason over which creatives are losing sleep.

- Losing inspiration and motivation: 47%
- Pressure to deliver more creative ideas faster than ever: 43%
- Not being trained sufficiently in new skills: 42%
- Financial or job security: 32%
- Not being original: 31%
- Not meeting the expectations set for them: 27%
- Existing skills becoming irrelevant: 26%
- Losing their artistic authenticity and selling out: 23%
- Never making it in the profession: 16%
- Being misunderstood: 15%
- Losing the respect of their peers: 7%
How creatives feel about the future

Creatives across the region are optimistic about the future.

- 80% believe the best days are ahead
- 20% believe the best days are behind

APAC
Regional Analysis
Asia-Pacific
Sentiments of Creatives: India

How creatives view the industry

- Creativity and design thinking are more important to business: 98% (APAC 89%)
- Creatives are expected to learn new tools and techniques: 96% (APAC 93%)
- Creatives are increasingly working across multiple mediums and disciplines: 95% (APAC 94%)
- Technology is enabling creatives to be more in control of their professional destiny: 90% (APAC 85%)

What keeps them up at night

- Pressure to deliver more creative ideas and content faster: 49% (APAC 43%)
- Insufficient training in new skills: 43% (APAC 42%)
- Losing inspiration and motivation: 37% (APAC 47%)
Sentiments of Creatives: India

The top three driving forces behind the changing role of creatives

- New technologies that change how they do their work
  - APAC 63%

- The impact of social media on the creative industry
  - APAC 41%

- New platforms for reaching their audience
  - APAC 39%

How have mobile devices changed the creative process

- Work is now accessible to a broader audience
  - APAC 53%

- Being able to capture inspiration in the moment and on the go
  - APAC 52%

- Being able to create content anywhere
  - APAC 47%

Main motivators at work

- Desire to learn new things
  - APAC 72%

- Finding new solutions to design challenges
  - APAC 41%

- Seeing their ideas brought to life in real world
  - APAC 59%

The impact of social media on the creative industry

- New technologies that change how they do their work

- The impact of social media on the creative industry

- New platforms for reaching their audience

How have mobile devices changed the creative process

- Work is now accessible to a broader audience

- Being able to capture inspiration in the moment and on the go

- Being able to create content anywhere

Main motivators at work

- Desire to learn new things

- Finding new solutions to design challenges

- Seeing their ideas brought to life in real world

Creative Pulse 2016
Sentiments of Creatives: Australia & New Zealand

How creatives view the industry

- Creativity and design thinking are more important to business
  - APAC 89%
- Creatives are expected to learn new tools and techniques
  - APAC 93%
- Creatives are increasingly working across multiple mediums and disciplines
  - APAC 94%
- Technology is enabling creatives to be more in control of their professional destiny
  - APAC 85%

What keeps them up at night

- Financial or job security
  - APAC 32%
- Pressure to deliver more creative ideas and content faster than ever
  - APAC 43%
- Losing inspiration and motivation
  - APAC 47%
Sentiments of Creatives: Australia & New Zealand

The top three driving forces behind the changing role of creatives

New technologies that change how they do their work APAC 63%

The impact of social media on the creative industry APAC 41%

New platforms for reaching their audience APAC 39%

How have mobile devices changed the creative process

Work is now accessible to a broader audience APAC 53%

Being able to capture inspiration in the moment and on the go APAC 52%

Created more output requirements which makes their job harder APAC 36%

Main motivators at work

Desire to learn new things APAC 72%

Doing great work APAC 53%

Mastering new technologies APAC 51%

Creating more output requirements which makes their job harder APAC 36%
Sentiments of Creatives: Greater China

How creatives view the industry

- Creatives are increasingly working across multiple mediums and disciplines
  - APAC 94%

- Creatives are expected to learn new tools and techniques
  - APAC 93%

- Creativity and design thinking are more important to business
  - APAC 85%

- Technology is enabling creatives to be more in control of their professional destiny
  - APAC 85%

What keeps them up at night

- Losing inspiration and motivation
  - APAC 47%

- Not being trained sufficiently in new skills
  - APAC 42%

- Not being original
  - APAC 31%
Sentiments of Creatives: Greater China

The top three driving forces behind the changing role of creatives

- New technologies that change how they do their work [APAC 63%]
- Challenge of “breaking through the noise” to reach target audiences [APAC 42%]
- The impact of social media on the creative industry [APAC 41%]

How have mobile devices changed the creative process

- They can capture inspiration in the moment and on the go [APAC 52%]
- Work is now accessible to a broader audience [APAC 53%]
- They are using mobile devices to present creative concepts [APAC 39%]

Main motivators at work

- Desire to learn new things [APAC 72%]
- Seeing their ideas brought to life in the real world [APAC 59%]
- Mastering new technologies [APAC 51%]
Sentiments of Creatives: Korea

How creatives view the industry

- Creatives are expected to learn new tools and techniques
  - APAC 93%
- Creatives are increasingly working across multiple mediums and disciplines
  - APAC 94%
- Technology is enabling creatives to be more in control of their professional destiny
  - APAC 85%
- Creatives agree that mobile is transforming the face of creativity and design
  - APAC 87%

What keeps them up at night

- Not being trained sufficiently in new skills
  - APAC 42%
- Losing inspiration and motivation
  - APAC 47%
- Not being original
  - APAC 31%
Sentiments of Creatives: Korea

The top three driving forces behind the changing role of creatives

- New technologies that change how creatives work: APAC 63%, 51%
- New responsibilities added to the design/creative function: APAC 38%, 51%
- New platforms for reaching the audience: APAC 39%, 50%

How mobile devices have changed the creative process

- They use mobile devices to present creative concepts: APAC 39%, 46%
- Created more output requirements which makes their job harder: APAC 36%, 45%
- They can capture inspiration in the moment and on the go: APAC 52%, 44%
Sentiments of Creatives: Southeast Asia

How creatives view the industry

- Creativity and design thinking are more important to business (APAC 89%, 94%)
- Creatives are increasingly working across multiple mediums and disciplines (APAC 94%, 93%)
- Creatives are expected to learn new tools and techniques (APAC 93%, 92%)
- Technology is enabling creatives to be more in control of their professional destiny (APAC 85%, 85%)

What keeps them up at night

- Losing inspiration and motivation (APAC 47%, 54%)
- Pressure to deliver more creative ideas and content faster than ever (APAC 43%, 49%)
- Not being trained sufficiently in new skills (APAC 42%, 38%)

Creative Pulse | 2016
Sentiments of Creatives: Southeast Asia

The top three driving forces behind the changing role of creatives

- New technologies that change how creatives do work: APAC 63%
- The impact of social media on the creative industry: APAC 41%
- New platforms for reaching the audience: APAC 39%

How have mobile devices changed the creative process

- They can capture inspiration in the moment and on the go: APAC 52%
- Work is now accessible to a broader audience: APAC 53%
- They can create content anywhere: APAC 35%

Main motivators at work

- Desire to learn new things: APAC 72%
- Seeing their ideas brought to life in the real world: APAC 59%
- Doing great work: APAC 53%
Regional variations

Creatives feel that their role is changing rapidly
- More creatives in Korea (93%) and India (91%) feel the rapid change that is undergoing in the industry than the rest of the region, higher than the APAC average of 90%

Creatives agree that technology is enabling them to be more in control of their professional destiny
- Creatives in India (90%) and Korea (92%) feel empowered by technology
- Creatives in Greater China lag behind the region at 79%, lower than the APAC average of 85%

How mobile devices changed the creative process
- Creatives across the region are happy that their work is accessible to a wider audience
- In India, Australia and New Zealand, Southeast Asia and China, the need for more creative output had increased the pressure on creatives
- Responses from Korea (46%) however show a deviation from this trend. They are already using mobile devices to present creative ideas higher than the APAC average of 39%

Devices creatives are using for their creative processes
- India and Greater China at 73% each are still very reliant on desktops and laptops.
- While a majority in Australia and New Zealand and Korea are using iPads, traditional pen-paper continue to be a popular option.
- In Korea (65%) the usage of smartphones is as prevalent as the use of laptops and desktops.

Devices creatives would you like to use more, in the future, for their creative activities
- Respondents from Korea seem more keen to adopt smartphones (26%) (APAC – 13%) 
- Southeast Asia shows an increasing leaning towards iPad usage (31%) (APAC - 22%) 
- India (25%) and Greater China (26%) respondents primarily see desktops and laptops as their future choice (APAC - 21%) 
- In Australia and New Zealand, iPad usage (23%) may continue to stay ahead of other devices (APAC - 22%)
Things that motivate creatives

- Creatives across the region are motivated by the desire to do great work and mastering new technologies
- Creatives in Greater China (42%) are also most motivated by Financial Rewards (APAC - 43%)
- Creatives in Southeast Asia (64%) also rank knowing that their work is having an impact on business amongst the top factors (APAC - 42%)

Creative skills that will be most ‘in-demand’ over the next 12 months

- UX/UI design rates as the top skill across APAC followed by App Development
- In the Australia and New Zealand, App Development receives as much importance as UX / UI design
- Digital storytelling finds a close third place in India, Australia and New Zealand and Southeast Asia
- 3D modeling emerges as a one of the top three desired skill-sets in Korea which is unique to the region
- In Greater China, motion graphics is one of the top three preferences provided by respondents

Top three driving forces behind the change in the role of creatives

- New technologies that change how creatives do their work clearly ranks as the key driving force behind the changing role of creatives in the APAC region, with the impact of social media also playing an important role in all the countries other than Korea
- In Australia and New Zealand, India and Korea, new platforms for reaching their audience is a significant catalyst of change
- In Korea and Greater China, new responsibilities added to the design / creative function feature as an important secondary driving force
- The challenge of “breaking through the noise” to reach target audiences is a driving force in Southeast Asia

The most influential source of creative sparks and inspiration for the creative community

- The findings reflect that Film and Cultural imports from other countries feature as the greatest influencers of inspiration across the APAC region
- Indian respondents however, are more inspired by architecture rather than cultural imports
- The creative industry views fashion as the least important inspiration
How creatives feel about their potential for success as a creative of tomorrow

- A higher percentage of creatives in Greater China and Korea feel that they lack the necessary skills and resources for success in the days to come than the rest of the region
- India is ahead of the other regions in feeling optimistic about their skills

How creatives feel about digital analytics and metrics (i.e. big data) as it relates to creativity

- More than 70% of respondents of the survey, across India, Southeast Asia, Greater China, Australia and New Zealand and Korea would like to understand better, how digital analytics and data findings can give direction to design and creativity
- Creatives in India are most optimistic of the value that analytics provides to their creative process

What keeps creatives up at night

- Creatives across APAC have a common fear that keeps them up at night - the fear of losing inspiration and motivation. The idea that they may need more training in new skills compounds these fears
- Creatives in Australia and New Zealand worry about financial or job security more than the rest of the region at 40% (APAC 32%)

- Pressure to deliver more creative ideas and content faster than ever is a concern that creatives in India and Southeast Asia have at 49%, more than their peers in the other countries (APAC- 43%)
- More respondents from Greater China (38%) and Korea (45%) have a greater urge for original thought and creativity (APAC – 31%)

Key takeaways:

- Creatives feel that their work is seen as a game changer today and there is a great future coming up ahead, for them
- Companies that are driven by an understanding of design and its significance in determining market share are the ones that will be successful in the future
- Majority of the respondents feel that UX / UI will be the most in-demand skill over the next year, followed by App development
- Business impact followed by social media feedback and recognition from peers are considered to be the ultimate measures of success in today’s creative world
- This survey reflects the emergence of digital and mobile as powerful platforms for reaching audiences and creating meaningful impact
- There is interest in knowing more about how digital analytics and metrics can influence creativity and design
Using design as a tool to stand apart and reach out to consumers has now become a business mandate. To fulfill this mandate, creatives know they must automate the creative process with new skills, new tools and new digital technology. They believe that proficiency in technology and access to best-in-class tools, combined with intuitive creative excellence will be the difference maker.

Success often comes down to the last millisecond, when customers experience emotionally-charged content that's deeply relevant to their needs. In that moment when digital assets flash across a computer, tablet or in-store screen, it's a creative's job to deliver them with consistency, relevance and creativity. Then, visitors become buyers—and they don't just buy a little. They keep coming back and buying more.

A recent CMO Council survey reported senior marketers around the globe tie rich, personalized content to "higher response and engagement rates," "more timely and relevant interactions" and "greater customer affinity and word-of-mouth." Content is also directly linked to increased conversions and added customer retention.

With more technologies and tools at our fingertips than ever before, digital media and marketing can be the place where a brand's creativity really shines through. With iconic brand experiences and the resulting dividends for creatives, success stories of the future will be built with highly orchestrated digital design tools. By developing experiences that delight customers across websites, smartphones, tablets, wearables, and wherever else they go, creativity can pay off with big, long-term creative dividends.