Fragmentation Is The Greatest Frustration

Empowering Creative Professionals Through Integrated Tools

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ABOUT FORRESTER CONSULTING

Forrester Consulting provides independent and objective research-based consulting to help leaders succeed in their organizations. Ranging in scope from a short strategy session to custom projects, Forrester's Consulting services connect you directly with research analysts who apply expert insight to your specific business challenges. For more information, visit forrester.com/consulting.

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Executive Summary

Collaboration drives modern organizations and fuels their push to elevate design and customer experience. Unfortunately, creative and design professionals face greater time and energy demands now than ever before, which makes collaboration harder. Customers expect personalized content and stakeholders expect more speed and a higher volume of creative output. As we move toward greater participation in the design process, creative professionals must easily and effectively collaborate with both internal and external stakeholders as well as with fellow creatives.

However, obstacles in workflows and tools hinder creative professionals from collaborating effectively and delivering with the speed, volume, and craft expected. To address these challenges, creative and design organizations should invest in a comprehensive and flexible creative and collaborative solution that empowers creative and design professionals to do what they do best: understand customer needs and create content that meets it.

Adobe commissioned Forrester Consulting to evaluate the current state and barriers creative professionals face in their workflow. To explore this topic, Forrester conducted an online survey with 466 respondents and interviewed five creative/design professionals and managers in the United States, Japan, and Germany. Fielding occurred from April 10 to 28, 2020, during the COVID-19 global outbreak. Respondents were asked to answer as they would have before the outbreak, and to discuss their expectations post-outbreak. Results showed that while fragmented tools and workflows cause the most frustration for creative professionals, forward-thinking creative organizations have an opportunity to evolve collaboration solutions to drive growth.

KEY FINDINGS

› **Content needs evolve.** Most creative professionals (81%) believe customers demand custom content more now than ever. To this end, creative professionals are charged with working on many more assets and collaborating with more stakeholders than ever before. As these needs and expectations continue to grow, creative professionals' collaboration needs are evolving rapidly. Many of today's creative professionals are expected to meet larger content demands by juggling numerous tools and executing various creative outputs within their organizations.

› **So many tools, so little time.** Time is limited, yet it's repetitive organizational and collaboration activities — not content creation — that are foremost in the creative workflow. Most respondents (64%) believe administrative/collaboration tasks take "too much of their time." However, as creatives are increasingly stretched for time, their tools have not kept up. Most (53%) believe it is challenging to keep track of all the tools and platforms they use to align with stakeholders.

› **A comprehensive creativity solution is needed for tomorrow.** Creative professionals require solutions that work for them. The solutions need to be comprehensive enough to support cohesive and efficent workflows and flexible enough to allow integrations with new tools and capabilities. The majority of respondents (86%) believe having a cohesive suite of services that offers tools to help creative professionals do their jobs is a high or critical priority. Creative professionals would turn to a cohesive suite of services that offers components and assets, built-in analytics tools, and AI features that save time on organizational tasks.

> "The number of assets is skyrocketing. There are loads more content than before. Ideally you do special versions for every channel. . . . It's not only the creative part of content [that has changed], but you also have to know about the organizational process and how to set up projects."
>
> *Senior content editor, SMB creative agency*

79% of those surveyed believe it is "challenging to meet the demands for content creation today."

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Collaboration Needs Evolve

Today's creative professionals face escalating customer content and brand expectations. As customer demand for content continues to surge, so too have the demands on creative professionals. The increased demands and workloads have made it so most creative professionals must wear many hats within their organizations. But with many hats come many tools and many points of collaboration. Creative professionals are stretched to their limits when it comes to delivering content, and they're burdened with a plethora of tools, revealing gaps between what they need to collaborate effectively and the tools they have today. In surveying 466 creative and design professionals and managers, we found that:
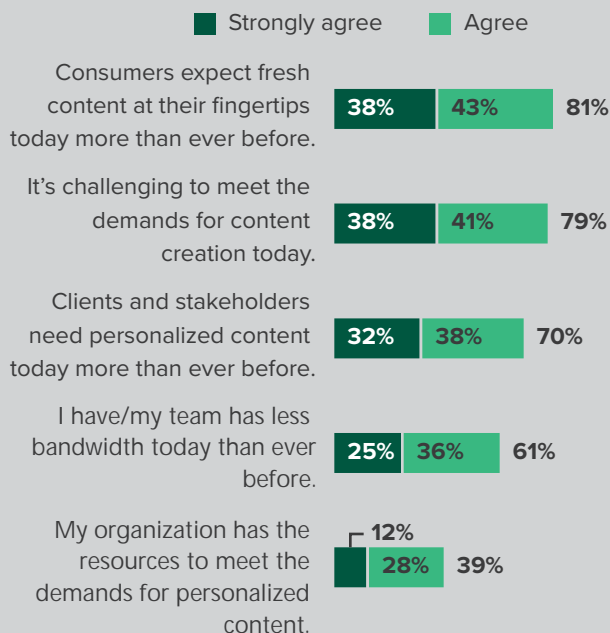
› **Personalized content needs are higher than ever before.** Most respondents (81%) reported that consumer expectations for content is at an all-time high. Additionally, 70% said that the need for personalized content has also risen among both clients and stakeholders. With these high customer expectations and personalized content demands, 79% of creative professionals find it challenging to meet the demands for content creation today (see Figure 1).

81% believe "consumers expect fresh content at their fingertips today more than ever before."

Figure 1: Creative Content Expectations

"Please indicate the extent to which you agree or disagree with the following statements." (Showing "Strongly agree" and "Agree")

■ Strongly agree   ■ Agree

Statement	Strongly agree	Agree	Total
Consumers expect fresh content at their fingertips today more than ever before.	38%	43%	81%
It's challenging to meet the demands for content creation today.	38%	41%	79%
Clients and stakeholders need personalized content today more than ever before.	32%	38%	70%
I have/my team has less bandwidth today than ever before.	25%	36%	61%
My organization has the resources to meet the demands for personalized content.	12%	28%	39%

Base: 466 global creative professionals
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, May 2020

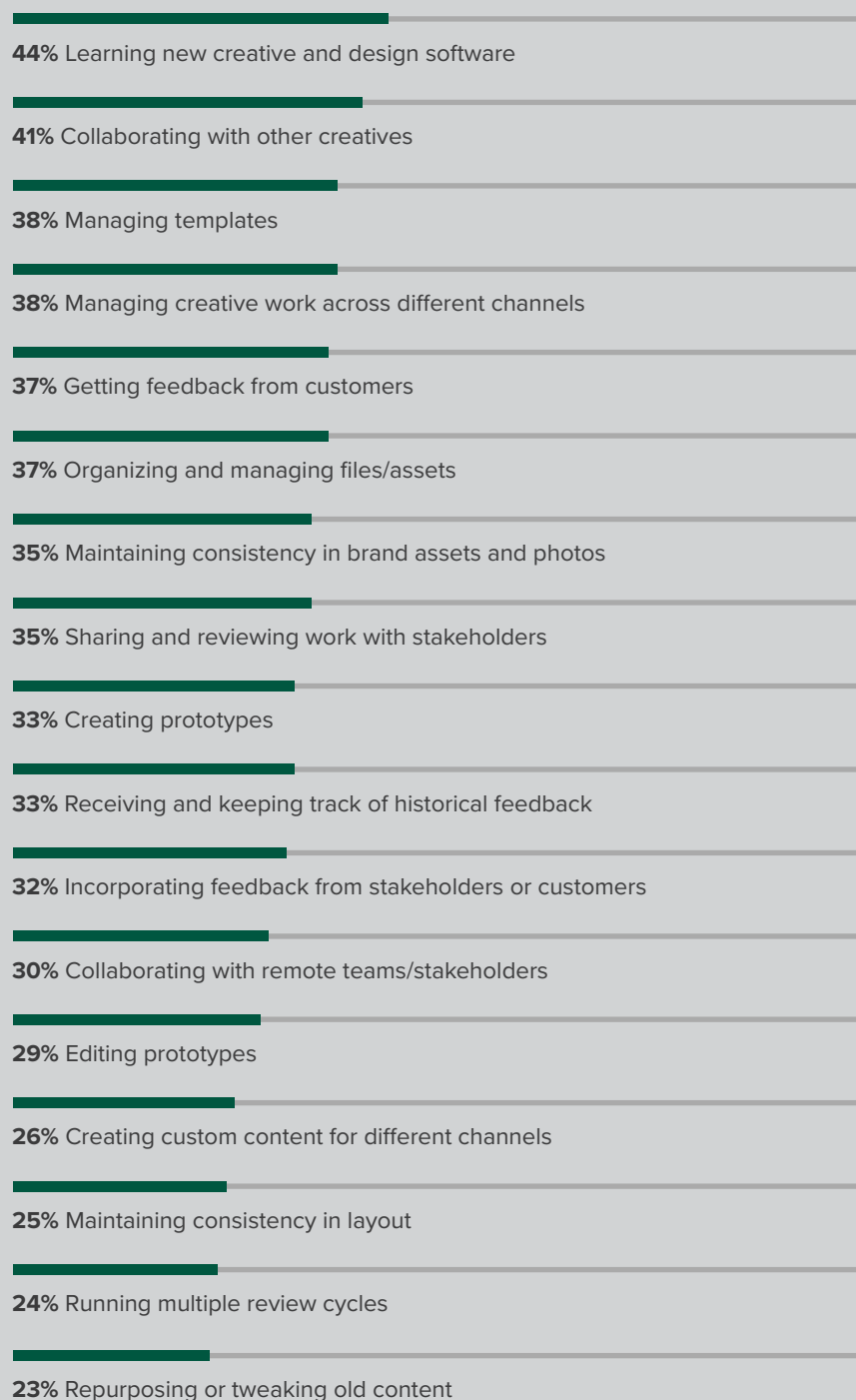Only 39% of respondents believe their organization has the resources to meet demands for personalized content.

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› **Collaboration needs are evolving rapidly.** With these expectations and increased demands, how (and how often) creative and design professionals collaborate has changed. According to 41% of respondents, the amount of time spent running multiple review cycles has undergone the most significant changes in the past two to three years. This is clearly demonstrated in the ways creative professionals spend their time each day. Various collaboration and organizational tasks done daily point to fragmentation in the workflow, as only 26% of creatives said they create custom content on a daily basis (see Figure 2). Instead, they are using their time day-to-day on a number of activities: 44% are learning new creative and design tools, 41% are collaborating with other creatives, and 38% are managing templates. This suggests a move toward greater participation in the design process, but it also means there are more hoops for creative professionals to jump through.

› **Creative professionals wear many hats.** On average, creative professionals are tasked with working on 3.5 types of creative outputs within their organization. These outputs include promotional content on social media (77%) and graphic design for print (67%), followed by online video content, enterprise-level training videos, commercials, photography, and user experience (UX)/user interface (UI). The rise in the amount of creative outputs professionals work on makes it so they wear many hats and switch off between activities to meet content demands.

› **Limited bandwidth and organizational resources challenge professionals.** Besides rising content demands, 61% of creative professionals find that they have less bandwidth today than ever before (see Figure 1). Limited bandwidth and limited resources make it difficult for creative professionals to keep up with the needs of their stakeholders. Only 39% believe their organization is equipped with the resources to meet their content demands. This suggests organizations could be better equipped and more prepared to meet demands of today or the future. As bandwidth and resources get tighter, creative and design professionals are challenged with adapting and evolving how they work and collaborate.

61% of creative professionals find that they have less bandwidth today than ever before.

Figure 2: Day-To-Day Creative Design Activities

"Which of the following creative design activities, if any, do you perform in your day-to-day?"

44% Learning new creative and design software

41% Collaborating with other creatives

38% Managing templates

38% Managing creative work across different channels

37% Getting feedback from customers

37% Organizing and managing files/assets

35% Maintaining consistency in brand assets and photos

35% Sharing and reviewing work with stakeholders

33% Creating prototypes

33% Receiving and keeping track of historical feedback

32% Incorporating feedback from stakeholders or customers

30% Collaborating with remote teams/stakeholders

29% Editing prototypes

26% Creating custom content for different channels

25% Maintaining consistency in layout

24% Running multiple review cycles

23% Repurposing or tweaking old content

Base: 466 global creative professionals
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, May 2020
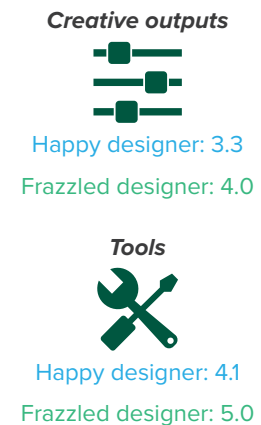
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🍃 *DID YOU KNOW?*

DESIGNERS EXPERIENCE FRAGMENTATION DIFFERENTLY

Organizations struggle to support their creative professionals. To determine if there are differences in how these professionals experience fragmentation in their workflow, we asked them a question about pain points in their organization's design process.[1] This question included pain points such as review cycles, collaboration, and centralizing assets and components. From those results, we identified two unique groups of designers: the "frazzled designers" and "happy designers." To further examine these sets of designers, we examined key characteristics of both.

We found that frazzled designers work on more creative outputs and use more tools in their organizations than their counterparts (see Figure 3). Just over half of happy designers are from small and medium-sized businesses (SMBs) and, similarly, just over half of frazzled designers come from enterprise companies. Not surprisingly, we found that frazzled designers have more to juggle as their day-to-day responsibilities are overrun by more organizational and collaboration tasks than those of happy designers (see Figure 4).

Figure 3: Average Number Of Creative Outputs And Tools

Creative outputs

Happy designer: 3.3
Frazzled designer: 4.0

Tools

Happy designer: 4.1
Frazzled designer: 5.0

Base: 466 global creative professionals
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, May 2020

Figure 4: Day-To-Day Creative Activities

"Which of the following creative design activities, if any, do you perform in your day-to-day?"

■ Frazzled   ■ Happy

| Activity	Frazzled	Happy
Maintaining consistency in brand assets and photos	50%	27%
Creating prototypes	49%	24%
Managing creative work across different channels	46%	33%
Managing templates	44%	35%
Getting feedback from customers	44%	33%
Organizing and managing files/assets	44%	33%
Collaborating with remote teams/stakeholders	37%	27%
Editing prototypes	36%	25%
Maintaining consistency in layout	32%	22%
Running multiple review cycles	32%	20%

Base: 466 global creative professionals
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, May 2020

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So Many Tools, So Little Time

The increased demands and responsibilities on creative and design professionals makes it so time is one of their scarcest resources. These professionals need to create and collaborate more with limited time. Whether they're relatively "frazzled" or "happy," juggling outputs and daily collaboration and organizational activities not only takes time away from creatives, but it also brings other frustrations to the surface, and that includes tooling. Our data suggests that keeping track of reviews, versioning, and centralizing inputs causes some of the greatest headaches for creative professionals. While collaboration is understood to be essential, creative professionals seek tools that will decrease organizational pain points.
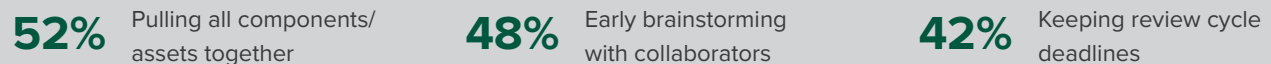
> › **Too little time in their day.** Creative professionals' limited bandwidth underscores the need for increased efficiency. When asked to assess the time spent on tasks during an average project, 64% of creative professionals said administrative/collaborative tasks take "too much" of their time. Additionally, creative professionals reported they spend less than half their time creating original content during their standard day. They also said that while organizing and managing assets is essential, it's also one of the worst uses of their time. Collectively, creative professionals would prefer to see tooling that increases efficiency and extends the time they can spend on creative tasks.

> › **Review, review, review.** For creative professionals, pulling all components and assets together, brainstorming early with collaborators, and keeping review cycle deadlines are some of the biggest pain points in their organization's design process (see Figure 5). In the words of a senior content editor at an SMB creative agency:

"Review, review, review. If you don't have a good process, it's more time organizing than actually doing the stuff."
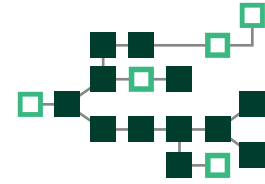
64% find that administrative/ collaborative tasks take "too much" of their time.

Figure 5: Top Pain Points In Design Process

52% Pulling all components/ assets together

48% Early brainstorming with collaborators

42% Keeping review cycle deadlines

Base: 466 global creative professionals
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, May 2020

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› **Tooling multiplies the issue.** Creative professionals utilize numerous tools in their organization, with an average of 4.4 tools supplied for use in their creative/design workflow and an average of five tools for frazzled designers (see Figure 3). However, 53% of respondents find it challenging to keep track of all the tools and platforms they use to align with stakeholders (see Figure 6). For creative professionals, many tools multiply the issue. Seventy-five percent believe their productivity would increase if they had access to the "right" tools. As one creative director at a global enterprise company said:

"We have so many partial solutions that don't really work. There's this influx of 'kinda' tools: one tool where we keep a Gantt chart, one where we keep a priority list, one where we can chat, one where we can chat and upload . . . I don't know how we could get to a world where one tool solves everything, but I just think we jump from tool to tool and we create these tools that we think are going to work and help, but we're just creating others."
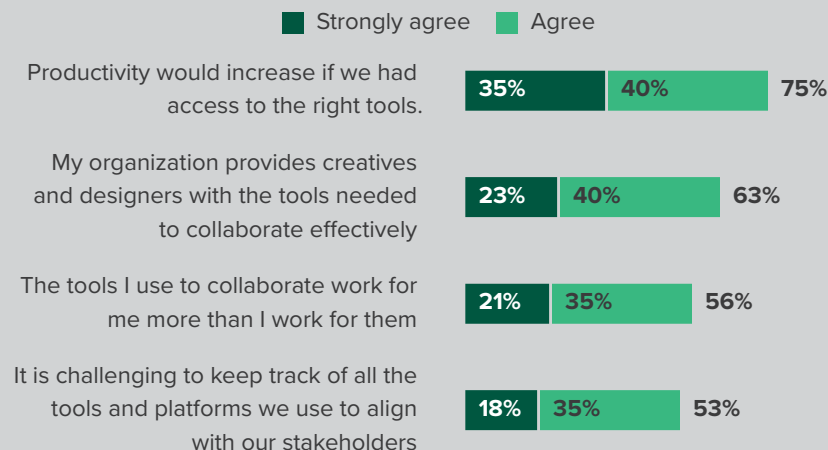
"We have so many partial solutions that don't really work. There's this influx of 'kinda' tools."

Creative director, global enterprise company

Figure 6: Tooling Multiplies The Issue

"Please indicate the extent to which you agree or disagree with the following statements." (Showing "Strongly agree" and "Agree")

■ Strongly agree ■ Agree

Productivity would increase if we had access to the right tools.
35% **40%** **75%**

My organization provides creatives and designers with the tools needed to collaborate effectively
23% **40%** **63%**

The tools I use to collaborate work for me more than I work for them
21% **35%** **56%**

It is challenging to keep track of all the tools and platforms we use to align with our stakeholders
18% **35%** **53%**
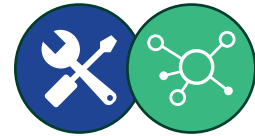
Base: 466 global creative professionals
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, May 2020

75% of respondents believe their productivity would increase if they had access to the right tools.

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Comprehensive Creativity Solution For Tomorrow

Collaboration needs are rapidly evolving along with the expectations creative and design professionals have for an ideal collaboration solution. With increased demand for content, fragmentation in tooling and workflows, and productivity concerns, forward-thinking creative organizations should look for efficient tooling for today's creative professionals. We found:
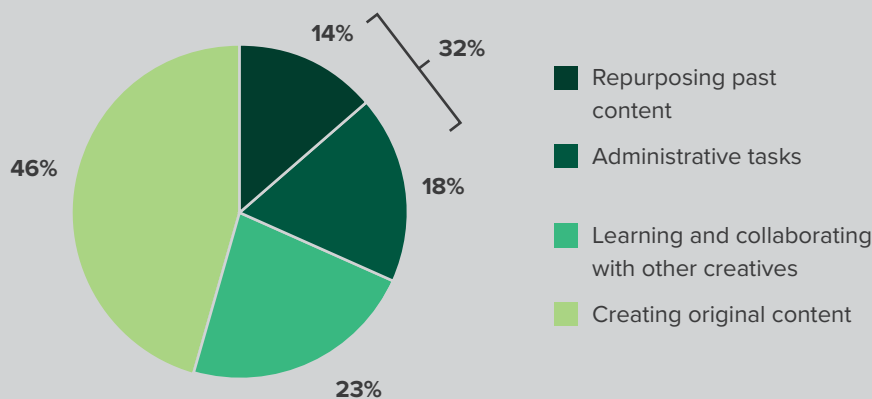
› **Comprehensive solutions are of high interest.** Most creative professionals (86%) believe having a cohesive solution that offers tools to help creative professionals do their job is a high or critical priority. Besides using a cohesive solution, professionals also require integration capabilities. When asked to rank a list of features that are most important to have in this cohesive solution, respondents ranked integrated collaboration workflows (e.g., project management/organizational tools) as most important.

› **Time saving features are key.** An ideal solution should include components/assets, templates, version tracking, and review management to give creative professionals more time back in their day-to-day (see Figure 7). Additionally, respondents ranked "components/assets to reduce time-to-market" as the top feature they'd be interested in seeing in a cohesive solution (see Figure 8).

86% find a cohesive platform of services that offers tools to help creative professionals do their jobs a high or critical priority.

Figure 7: Time Spent In Their Day

"In general, what percentage of your day is spent on the following?" (Showing mean %)

14%
32%
46%
18%
23%

- Repurposing past content
- Administrative tasks
- Learning and collaborating with other creatives
- Creating original content

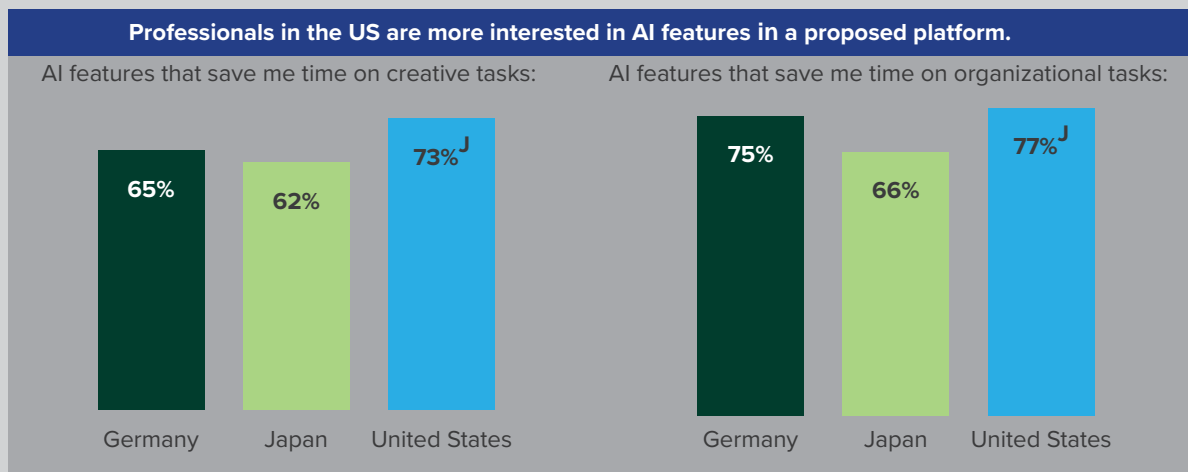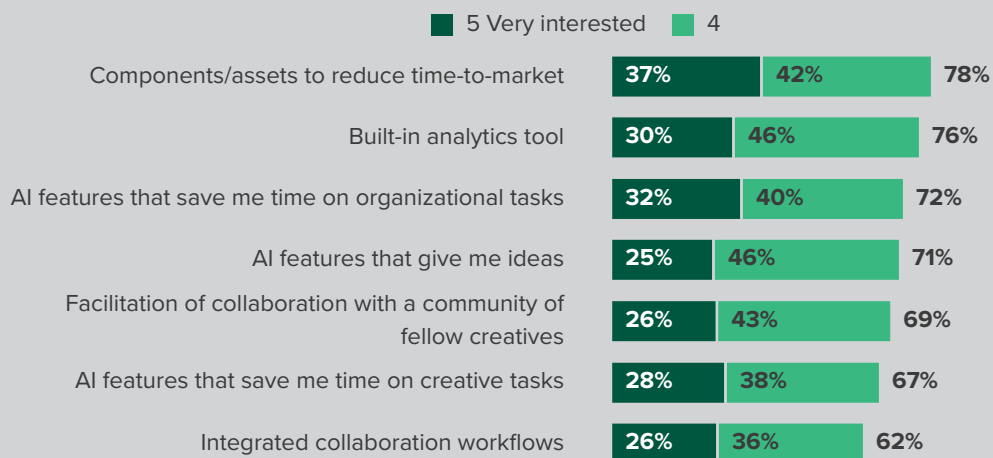Base: 466 global creative professionals
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, May 2020

Repurposing past content and administrative tasks takes about one-third (32%) of respondents' time each day.

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› **Professionals seek built-in analytics tools and AI features.** Most creative professionals would turn to a cohesive suite of services that offers built-in analytics tools (76%), has AI features that save time on organizational tasks (72%), and helps them ideate (71%) (see Figure 8). In particular, we found that creative professionals are interested in AI features that are the right combination of agentive (e.g., organizing files for them) and assistive (e.g., suggesting changes). The ability to leverage tools to inform ideation and creativity was key among professionals we interviewed. All the while, efficiency and time management remain key for creative professionals considering a solution.[2] When asked what an "ideal solution" would look like, the idea of augmented collaboration surfaced. Here is what a creative director at a global enterprise company would like to see:

"[In an ideal] world, we can use machine learning and AI to strip out things that could cause client/partner breach of use and have a hive of creative assets that we can all look at as a creative community. . . . [It would] create a place where we can look at trends [and be] a place where we can create a visual library of work that is happening right now that informs us at a very high level. . . . There [would be] a dashboard you can see, and you can dig in as you need in real time."

Figure 8: Interest In Features In Potential Cohesive Platform Of Services

	5 Very interested	4	Total
Components/assets to reduce time-to-market	37%	42%	78%
Built-in analytics tool	30%	46%	76%
AI features that save me time on organizational tasks	32%	40%	72%
AI features that give me ideas	25%	46%	71%
Facilitation of collaboration with a community of fellow creatives	26%	43%	69%
AI features that save me time on creative tasks	28%	38%	67%
Integrated collaboration workflows	26%	36%	62%

Professionals in the US are more interested in AI features in a proposed platform.

AI features that save me time on creative tasks:

Germany	Japan	United States
65%	62%	73%[J]

AI features that save me time on organizational tasks:

Germany	Japan	United States
75%	66%	77%[J]

Base: 466 global creative professionals
Note: Letters denote statistically significant differences at the 95% confidence interval (J=Japan, G=Germany, U=US)
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, May 2020

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THE "NEW NORMAL" ONLY AMPLIFIES NEED FOR A COMPREHENSIVE CREATIVITY SOLUTION

Fragmentation is only amplified in our "new normal" following the spread of COVID-19. The need to collaborate digitally and seamlessly was already at the forefront for many creatives, and changes in workflows because of the pandemic only amplified it. The majority of respondent professionals agree/strongly said the top implications of the pandemic are the need to have visibility into the creative's process (80%), followed by the need for access to the creative community (72%) (see Figure 9). Though most agree there will be clear long-term implications for their industry, some of the creative professionals we interviewed said the pandemic is heralding needed change.

"I think in a few years there will be less offices, more remote working, and more collaboration with good tools."
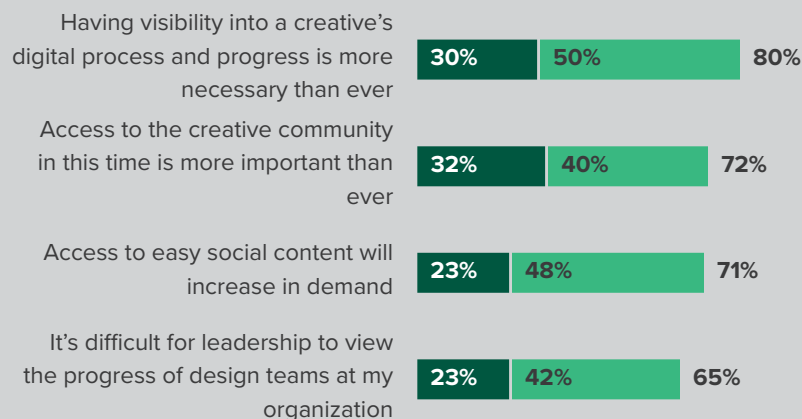
Senior content creator at a global agency

"It has forced everyone to use new ways of working. . . . Before the COVID-19 pandemic, some senior leaders were reluctant to use email, work on a chat tool, or work remotely. . . . But it's been good for our organization. I think, in a few years, there will be fewer offices, more remote working, and more collaboration with good tools. [Good tools] speed us up and leave us more time for the real creative part."

Senior content creator, global creative agency

Given the impact and implications of the pandemic, many organizations feel a heightened sense of urgency when it comes to addressing creatives' fragmented workflows and simplifying collaboration through tooling.

Figure 9: Implications Of The COVID-19 Pandemic On Creative Organizations

"Thinking about the potential implications of COVID-19 to you, to what extent do you agree or disagree with the following?"
(Showing "Strongly agree" and "Agree")

Having visibility into a creative's digital process and progress is more necessary than ever
30% | 50% | 80%

Access to the creative community in this time is more important than ever
32% | 40% | 72%

Access to easy social content will increase in demand
23% | 48% | 71%

It's difficult for leadership to view the progress of design teams at my organization
23% | 42% | 65%

Base: 466 global creative professionals
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, May 2020

72% of respondents believe access to the creative community is more important now than ever.

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Key Recommendations

Forrester's in-depth survey of creative professionals and managers about the current industry landscape and their workflows yielded several important recommendations:

Invest in integrated creativity tools that support collaboration and reuse. The trend toward using existing assets to create something new will not stop, and neither will the need for collaboration. Seek ways to work efficiently through integrated collaboration tools, build workflows, and upgrade software to enable these efforts.

Seek extensibility in creativity and collaboration solutions. Combatting fragmentation in tooling requires a comprehensive and cohesive solution with flexibility. Invest in solutions that both deliver on the comprehensiveness that a creative and design professional requires today and plays well with other software. Not all creative organizations look alike, so plan for an extensible solution that connects to your unique and necessary third-party tools.

Don't expect *more* tools to solve your problems. Having more tools does not lead to happier, more productive creative and design professionals. Adding yet another piece of new software won't improve an uncollaborative workflow, disorganization, or understaffed teams. Look for deeper changes like different collaboration practices, better prioritization, or even education through collaboration. Then identify the technology solution that will promote those kind of behaviors — preferably one with many integrations between teams and tools.

Augment creative professionals' capabilities with AI. Humans excel at generating new and creative ideas, but they often don't enjoy performing monotonous or repetitive tasks like removing backgrounds, creating many similar iterations of the same visual, or generating automated workflows. And many creative professionals would draw inspiration from AI suggestions if they're done right. Expect your teams to value AI-enhanced features that boost productivity and avoid monotony, as well as those that smartly inspire them to overcome creative blocks.
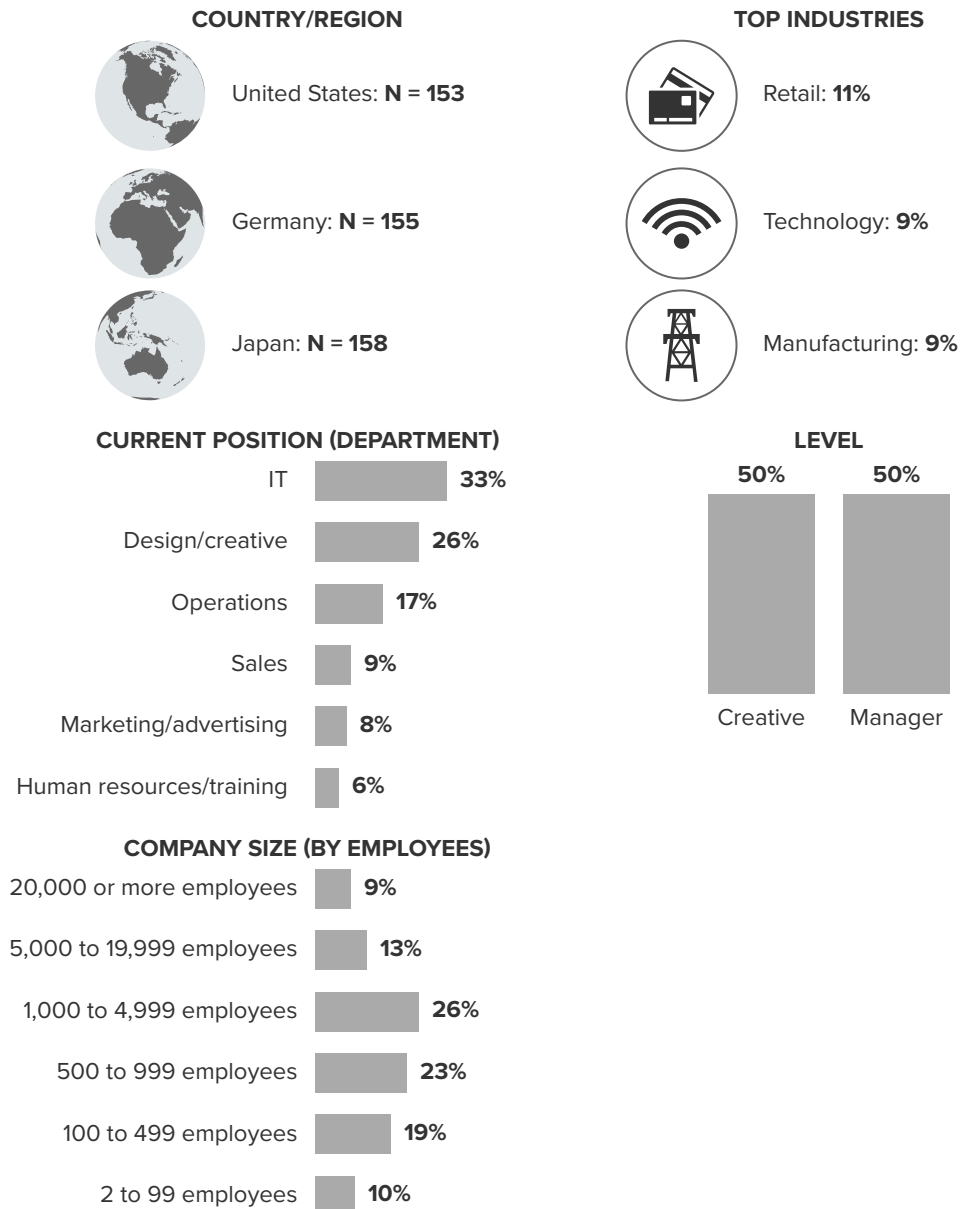
Support creative professionals' creativity and productivity. Creative and design professionals are caught between generating new ideas and efficiently executing. One task might require quickly creating a new version of existing content while another demands a new and imaginative idea. Ensure tools and processes support both modes. Judge success not just on volume of content produced, but on how well that content supports business outcomes.

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Appendix A: Methodology

In this study, Forrester conducted an online survey of 466 cross-industry creatives and their managers in the United States, Germany, and Japan, and interviewed five creative and design professionals and managers or to evaluate the current state and barriers creative professionals face in their workflows. Survey participants included creative/design professionals and creative/design managers and above with responsibility for purchasing creative solutions at their organization. Questions provided to the participants asked about their typical work environment, the tools they use, and pain points. The study began and was completed in April 2020, during the COVID-19 global outbreak. Respondents were asked to answer as they would have before the outbreak, and to discuss their expectations post-outbreak.

Appendix B: Demographics

COUNTRY/REGION

United States: **N = 153**

Germany: **N = 155**

Japan: **N = 158**

TOP INDUSTRIES

Retail: **11%**

Technology: **9%**

Manufacturing: **9%**

CURRENT POSITION (DEPARTMENT)

IT	**33%**
Design/creative	**26%**
Operations	**17%**
Sales	**9%**
Marketing/advertising	**8%**
Human resources/training	**6%**

LEVEL

Creative	Manager
50%	**50%**

COMPANY SIZE (BY EMPLOYEES)

20,000 or more employees	**9%**
5,000 to 19,999 employees	**13%**
1,000 to 4,999 employees	**26%**
500 to 999 employees	**23%**
100 to 499 employees	**19%**
2 to 99 employees	**10%**

Base: 466 global creative professionals
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, May 2020

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Appendix C: Supplemental Material

RELATED FORRESTER RESEARCH

"Digital CX Trends, 2019," Forrester Research, Inc., April 22, 2019

Appendix D: Endnotes

[1] "Frazzled" vs. "happy" designer calculation: We used the number of pain points in the design process at respondents' organizations to determine placement in one of these two groups. Those who selected four to eight pain points were identified as "frazzled" designers. Those who identified zero to three pain points were identified as "happy" designers.

[2] Source: "Three Takeaways From Adobe's MAX Conference — About AI Design And Creativity," Forrester Research, Inc., November 14, 2019.

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