Everest Group Content Supply Chain – Revolutionizing the Content Development Lifecycle

Focus on Adobe

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Contents

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01

Introduction and overview

- Research methodology
- Background of the research

Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

01

Robust definitions and frameworks

Function specific pyramid, Total Value Equation (TVE), PEAK Matrix®, and market maturity

02

Primary sources of information

Annual contractual and operational RFIs, provider briefings and buyer interviews, web-based surveys

03

Diverse set of market touchpoints

Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership

04

Fact-based research

Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and providers

Proprietary contractual database of over 680 experience-focused IT contracts (updated annually)

Year-round tracking of 35+ IT service providers and design agencies

Large repository of existing research in Interactive Experience (IX) services

Over 30 years of experience advising clients on strategic IT, business services, engineering services, and sourcing

Executive-level relationships with buyers, providers, technology providers, and industry associations

Background of the research

In today's hyper-connected world, where customers interact with brands across multiple touchpoints, the demand for seamless experiences and 1:1 personalization has reached unprecedented levels. The increasing demand for content, coupled with rising customer expectations, poses a challenge for marketers to create, share, and track quality content at scale.

Content Supply Chain (CSC) enables marketers to seamlessly integrate the various processes in a content ecosystem. It can help spearhead both technological and organizational transformation by encompassing people, processes, and technology dimensions. Through an effective CSC implementation, marketers can gain a competitive advantage by streamlining the workflow, deliver content at scale, and track their market success.

In this research, Everest Group has taken the opportunity to highlight the potential benefits that marketers can expect by adopting a content supply chain. We also emphasize the future implications of it for both enterprises and service providers

Scope of this report

Geography
Global

Industry
Content Supply Chain (CSC)

02

Building a case for a content supply chain

- The evolution of the content ecosystem
- Content supply chain life cycle
- Content supply chain from a product perspective
- Fragmentation and challenges pertaining to the content supply chain

As we trace the evolution of content, we see the slow and steady maturing content ecosystem and the evolving consumer content preferences

The inception of digital content

The 1990s saw the emergence of the internet, which led to a surge in primarily text-based content creation (with limited interactivity).

The dawn of Web 2.0

Web 2.0 brought along with it the possibilities of dynamism and user generated content. The rising popularity of blogging platforms in the 2000s further enhanced the content ecosystem.

The high dominance of social media

The 2010s experienced the social media revolution, providing a big boost to the content ecosystem. The proliferation of smartphones further led to an increased strategy building around the content life cycle

The changing content consumption preferences

Consumer preferences began shifting from text-heavy content to other forms such as videos and podcasts. The advent of the COVID-19 pandemic further led to a rise in the popularity of short-form engaging and snackable content.

We are here

We are presently experiencing different content formats, ranging from text, to videos, to virtual and AR/VR content. The ever-changing dynamics of the ecosystem will keep redefining our behavioral shifts in content consumption.

Era of connected experiences

As we step into the connected future, omnichannel content consistency might not only define which form survives, but also, might lead to the emergence of newer content forms.

Source: Everest Group (2023)

A marketer's dream of experiencing a seamless content journey cannot be truly realized without incubating a CSC at the earliest

Defining the CSC life cycle

Asset type	3D	Image	Audio/Video	GIF	Text

Life cycle	Proposal layer	Production layer	Activation layer	Insights layer
Processes	Ideation	Review	Tagging and archiving	Analytics
	Creation	Refinement	Publishing	Feedback collection
	Refinement	Approval	Delivery and promotion	Optimization

Cloud infrastructure

Emerging technologies (such as gen AI and blockchain)

Omnichannel distribution

Privacy and security

Workflow automation

Source: Everest Group (2023)

Adopting the right set of tools across the CSC is essential to ensure the effectiveness of the solution

Defining the CSC life cycle

Asset type: 3D | Image | Audio/Video | GIF | Text

Life cycle: Proposal layer → Production layer → Activation layer → Insights layer

Processes

Proposal layer	Production layer	Activation layer	Insights layer
Content creation tools		Digital Asset Management (DAM)	Content analytics tools
Content Management System (CMS)		Content publishing tools	Feedback collection
Content Marketing Platform (CMP)			

Cloud infrastructure

Emerging technologies (such as gen AI and blockchain)

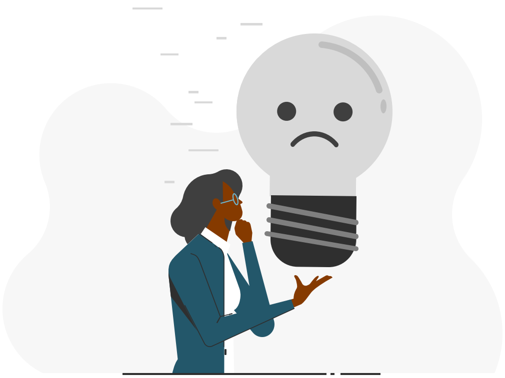
Omnichannel distribution

Privacy and security

Workflow automation

Source: Everest Group (2023)

Existing inefficiencies surrounding the fragmented CSC landscape will need fast resolution to experience the full potential of adopting a CSC at scale



Content challenges

- Content overload
- Lack of quality content
- Copyright challenges
- Plagiarism detection
- Misinformation and fake news

Enterprise challenges

- Lack of modular integration
- Siloed communication
- Lack of strategy-led business objective
- Excess manual involvement around non-creative and laborious tasks

Technological challenges

- Maintaining omnichannel brand consistency
- Fast evolving technology landscape
- Lack of content organization
- Archiving and retrieval difficulties

As the fragmentation and challenges keep stacking up against each other, stakeholders across the content journey life cycle will be impacted at different levels.

Content developers

Lack of sufficient information and feedback on their content; no KPIs to gauge the effectiveness of content

Marketers

Unable to target the desired audiences precisely; lack of relevant content

Enterprises

Untapped potential leads; inability to manage and scale content quickly

Consumers

Excess of irrelevant and annoying unrelated information; lack of personalized content

Source: Everest Group (2023)

03

Gearing up for a content supply chain

- How CSC mitigates marketer's worries
- Pre-requisite before adopting a CSC
- High-risk challenges faced by marketers while managing a CSC

Adopting a CSC at scale is the need of the hour, allowing marketers to achieve key benefits and effectively meet their business KPIs

Measure RoI and success
CSC can help combine business objectives with key metrics to ensure multi-channel performance insights to optimize the process, meet targets, and measure effective RoI.

Content security and reusability
CSC will help protect content from unauthorized use, while maximizing the value of content by repurposing it for different platforms, formats, or audiences at scale.

Omnichannel consistency
CSC will allow a consistent and seamless brand voice and messaging across various types of content and channels.

More personalized and localized content development
Adopting a CSC will aid in translating and localizing the content by adapting the message, tone, and cultural references for varying consumer preferences.

Decreased costs and lower time-to-market
CSC will reduce the multiple to-and-fro among siloed teams, save costs by reducing the high manual intervention, and speed up the time-to-market.

Quantity and quality-led scalability
CSC will allow enterprises to scale at ease, meet the growing requirements for content, and help meet the quality standards along with the increased content quantity.

The content supply chain helps free up monotonous and manual labor. This helps transfer productivity into high-impact work and skill-based tasks.

Source: Everest Group (2023)

Marketers need to define a clear vision and strategy before adopting a CSC, failing which it can turn out to be yet another marketing tool

Lay out a definitive content strategy

Marketers need to clearly define their key business objectives and target demographics. This enables optimization and development of personalized content at scale.

Investments in content creation solutions

Marketers need to strategically invest in the right tools and technologies that can significantly improve the effectiveness and efficiency of not only content creation and collaboration, but also automate routine tasks.

Optimize the activation and delivery pipeline

Proper investments are needed toward building capabilities to not only distribute the content, but also effectively manage the omnichannel content delivery processes.

Redefine the metrics to measure effectiveness

There is a need to define proper KPIs and adopt analytical tools to track the effectiveness of the desired business objectives. These will then help optimize and further refine the content and help in experimenting with strategies.

Source: Everest Group (2023)

In the journey to manage the CSC at scale, marketers will need to be ready to resolve several high-risk challenges

High-risk challenges faced by marketers

Complexity

As the CSC grows, there are high chances of it becoming more complex and difficult to manage between the multiple stakeholders, teams, and departments involved in the process. There are also the chances of an increased volume of content and channels for distribution.

Resource constraints

In order to effectively manage the CSC, there is a need for an increased number of resources, including time, money, and personnel. This can be a challenge for smaller organizations or those with limited budgets.

Quality control

It is challenging to control the quality of large-size content. It is important to establish clear guidelines and processes for content creation, review, and approval.

Consistency

It can also become difficult to maintain consistency in messaging, tone, and branding in the content, especially if multiple teams are involved in the content creation process.

Scalability

The CSC needs to be designed to scale as the organization grows by including agile processes, using flexible tools and technologies and anticipating future needs and challenges.

Source: Everest Group (2023)

04

The future of the content supply chain

- How marketers are using gen AI
- Gen AI solutions complementing the CSC
- Key CSC offerings, SI capabilities, and enterprise IPs
- Adobe and its products across the CSC
- Market success stories
- Framework for SIs to build capabilities around the CSC

Marketers have taken cognizance of gen AI tools; their rapid adoption is providing us a glimpse into the future of gen AI-powered content supply chain

Use cases

>70%
Content ideation

>75%
Content creation

>55%
Market data analysis

43-47%

Marketers are using/experimenting with gen AI during their course of work[1]

Use cases

>75%
Develop marketing campaigns

>50%
Personalization at scale

>60%
Automate manual tasks

Underlying concerns related to gen AI adoption

- Operational costs
- Accountability
- Hallucinations
- Biasness
- Quality and accuracy of data
- Privacy

1 Data true to date (2023)
Source: Everest Group (2023)

Gen AI tools have the potential to reshape the CSC by combining human skill with artificial improvisation at scale

Ideation

OpenAI

OpenAI's ChatGPT tool helps in generating creative suggestions, content completion, topic insights, and brainstorming assistance based on a wide variety of inputs.

Adobe's Firefly is a set of gen AI models that integrate with Adobe's Creative Cloud suite of apps and helps generate images based on simple text inputs.

Made On YouTube

YouTube's Dream Screen allows users to create AI-generated video or image background by just typing in what one wants to see.

Creation

WRITER

This AI tool helps fine-tune the data, fact-checks the output, and generates data for new contexts.

SURFER

This tool helps with content suggestions to match search hits, boost SEO and SEM rankings, and act as a content planner by identifying gaps.

letterdrop

This content operations platform helps repurpose content, optimize SEO rankings, generate content ideas, and drive leads.

Activation

mailchimp

It is an AI-powered, real-time marketing, automation, and email marketing platform that aids in content delivery.

albert BY ZOOMD

Albert is an AI-powered marketing platform that enables the rollout of advertising campaigns at scale.

Concured.

It is a content promotion and distribution tool that automates promotion efforts and helps drive engagement.

Analytics

SparkToro

It is an audience intelligence tool that provides audience intelligence data around demographics, behavior, and social usage.

BRAND24

It is an AI-powered social listening tool that delivers customer insights, identifies sales leads, and improves customer service.

Parse.ly Part of WordPress VIP

Parse.ly focuses on content analytics and optimization resources, providing real-time and aggregated data view.

Source: Everest Group (2023)

As the adoption of CSC picks up pace, product vendors are ramping up their CSC offerings across the value chain

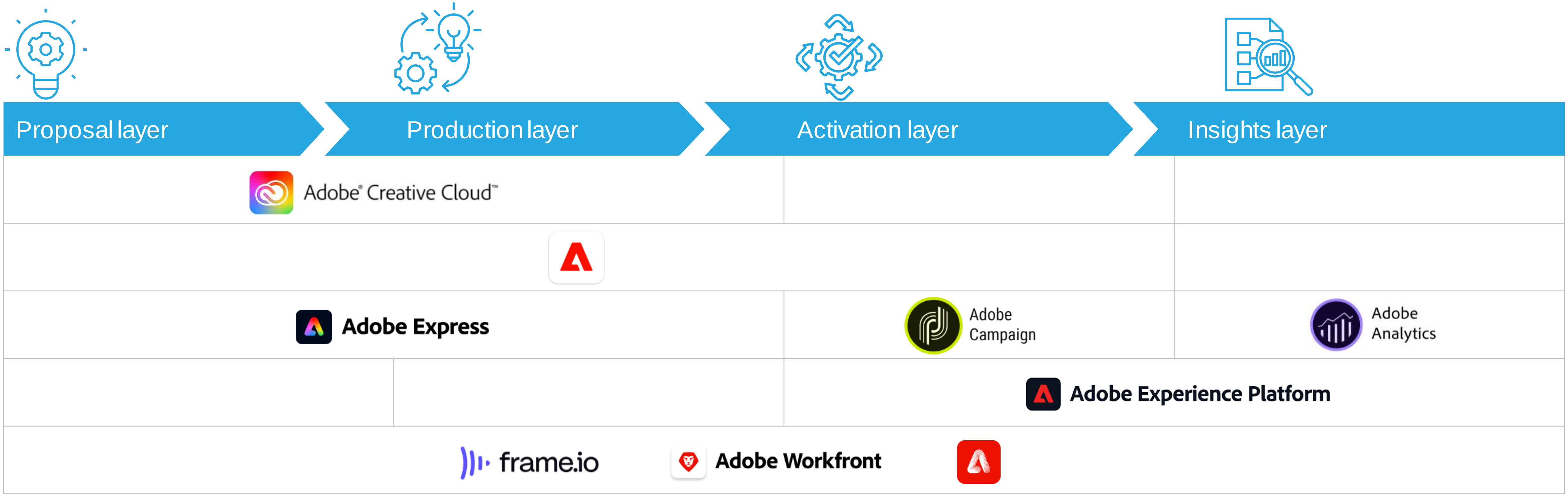
Level of maturity: High · High-medium · Medium · Medium-low · Low

Content creation tools · CMS · DAM · Content publishing tools · Analytics tools · CMP · Workflow management and automation

Tech vendor	Offerings[1]	Level of maturity	
Adobe	Content creation tools, CMS, DAM, Content publishing tools, Analytics tools, CMP, Workflow management and automation	Adobe offers a rich suite of offerings around the content ecosystem, with its products available across all stages of the CSC.	High
Celum	Content creation tools, DAM, Content publishing tools, Analytics tools, CMP, Workflow management and automation	Celum's solution portfolio for the CSC provides clients with multiple tools that enables them to build a CSC at scale.	High-medium
Contently	Content creation tools, Analytics tools, CMP	Contently is mainly into content creation, marketing, and analytics to aid clients with their requirements.	Medium
Bynder	Content creation tools, DAM, Analytics tools, Workflow management and automation	Bynder has a greater focus on DAM, though it has products surrounding content creation, analytics, and workflows.	Medium
Wrike	Content creation tools, CMP, Workflow management and automation	Wrike provides tools surrounding a host of use cases, though the product maturity is still in a nascent stage.	Medium-low

1 Data true to date (2023)
Source: Everest Group (2023)

Among the CSC product players, Adobe is the undisputed market leader in terms of the maturity and features of the CSC tools ecosystem[1]



1 Data true to date (2023)
Source: Everest Group (2023)

Enterprises across industries are increasingly adopting CSC solutions to meet their business outcomes and refine their internal workflows

	Objectives	Results
T Mobile	Centralize the marketing workflow and streamline the collaboration workflow by connecting strategy, creation, distribution, and performance	Increased marketing productivity by 47%, and saved more than US$2 million; enabled a reduction in time spent on manual reporting tasks, leading to enhanced data-driven decision-making
Under Armour	Consolidate multiple tools into a central repository, track asset usage, and share the developed assets effectively across the organization	Reduced file duplication, automated the process of content tagging, and simplified the asset search process for internal and external stakeholders
asics	Ensure seamless access to digital assets, eliminate duplication of content, speed up the search process, and ensure omnichannel consistency	Accelerated access to all assets via a centralized hub and enabled the reduction of usage of outdated assets; strengthened the brand narrative via consistent omnichannel delivery
voestalpine ONE STEP AHEAD.	Ensure consistency in the usage and exchange of digital assets, meet the increased demand for content, and mitigate issues related to the search and duplication of assets	Enabled a central hub integration to upload, manage, and distribute assets internally while also ensuring demand-based scalability

Source: Everest Group (2023)

Service providers need to develop end-to-end capabilities across the CSC ecosystem to cater to the growing appetite of enterprises' needs

<table>
<tr><th>Strategy and planning</th><th>Design and implementation</th><th>Run and operate</th><th>Measurement, maintenance, and support</th></tr>
<tr><th>Proposal layer</th><th>Production layer</th><th>Activation layer</th><th>Insights layer</th></tr>
<tr><td>• Build business strategies and KPIs for marketers
• Formulate multi-stakeholder input mechanisms</td><td>• Help streamline the review, refinement, and approval processes
• Automate non-creative manual work</td><td>• Metadata tagging, easy content search, and archiving
• Aid in personalization and promotional processes
• Enable seamless omnichannel delivery of content</td><td>• Track and analyze the data metrics
• Data-led optimization and enhancement of content
• Modify KPIs and strategies dynamically based on market sentiments</td></tr>
<tr><td colspan="4">Workflow and collaboration management services</td></tr>
<tr><td colspan="4">Content asset management services</td></tr>
<tr><td colspan="2">Content creation services</td><td>Digital publishing services</td><td>Analytics and insights services</td></tr>
<tr><td colspan="2"></td><td colspan="2">Campaign management, personalization, and delivery services</td></tr>
</table>

Source: Everest Group (2023)

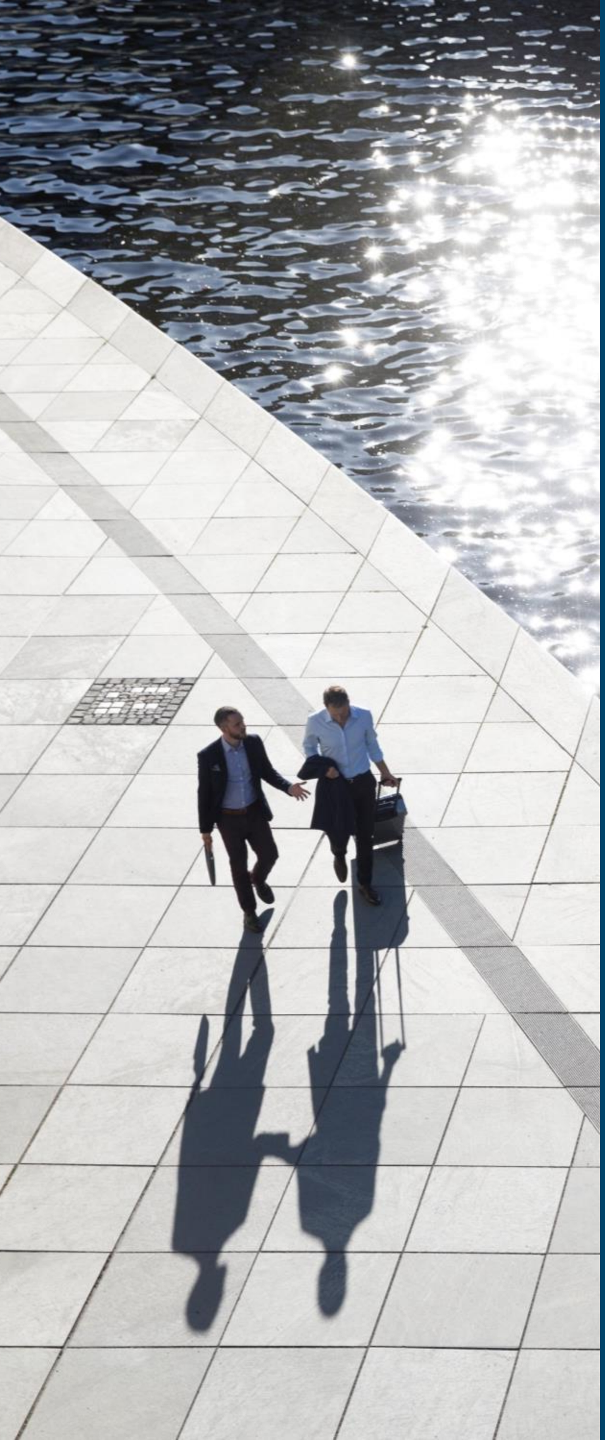
05

Appendix

Glossary

Glossary of key terms used in this report

CSC	Content supply chain is the end-to-end process of ideation, creation, distribution, and analysis of digital content of any types
CMP	Content marketing platform can be a tool or a solution that helps marketers develop, distribute, and manage their content across various channels
Gen AI	Generative artificial intelligence is a disruptive technology that can create content through human-led prompts
1:1 personalization	1:1 personalization is a practice of delivering unique experiences to customers at an individual level through the analysis of collected/provided customer data



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