

Hello. We are

screen dragon | 

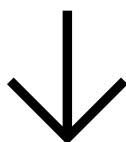


2023

Creative Operations Report

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Introduction

Welcome to Screendragon's latest audit of the creative operations industry. After a brief hiatus last year, we are back with the fifth edition of The State of Creative Operations.

In Q1 2023, we surveyed more than 100 people to see how creative workers are faring after a turbulent period for the industry. How are companies and individuals impacted by macroeconomic factors? Are creatives now leveraging AI for operations? What does a creative team look like in 2023?

Like previous editions, we also examine what tools are being utilised by creative teams. In view of that, you might be surprised at some of the gaps in the tech stack!

Lastly, we'll reveal what companies are setting the bar for creative work in 2023. This will include a collection of ads that were highlighted this year by the creative community for being most memorable and impactful.

If you'd like to discuss the contents of the report, then please feel free to contact me at fergal@screendragon.com. Otherwise, you can learn more about Screendragon at www.screendragon.com.

Thanks for downloading The State of Creative Operations 2023 and I hope you enjoy the report!



Fergal O'Shea

Head of Marketing at Screendragon

Executive Summary

There are many challenges facing creative teams in 2023 but the mood is still upbeat. The pandemic panic has ceased, and marketing teams are significantly more likely to grow this year rather than downsize. Most creative teams are now working in their environment of choice too! Whether it's in the office, at home, or hybrid.

Although the outlook is bright there are several challenges facing creative teams in 2023. Many creative teams grew in 2022 but most respondents still feel their team is under-resourced. Could this be related to another recorded increase in workloads compared to the previous year?

Lastly, there are notable gaps in tech stacks that are potentially making life difficult for creative workers in 2023. As noted above, many teams struggle to manage resources but less than half utilize a resource management tool.

Key Findings:

72%

Of creatives are working in their location of choice

66%

Saw an increase in workload in 2023 compared to 2022

58%

Feel their creative team is under-resourced

< 50%

Less than half of creative teams utilize workflow software



The #1 challenge for software buyers is finding a tool that meets requirements



The #1 blocker to software adoption is time (or lack of!)

82%

Plan to invest in a new creative software in 2023

Some of the companies that participated in our research:



Workplace of Choice

In the last edition of The State of Creative Operations in 2021, we surveyed a workforce that was slowly migrating towards a hybrid model. However, 58% were still working from home every day. We can reveal that **fully remote workers are now a minority** in the creative industry as less than 24% base themselves at home daily. Hybrid work is now the norm for creatives as 64% of our community switch between home and hub on a weekly basis.

An interesting revelation from our workplace study is that most creatives, 72% to be exact, are working in their location of choice (whether it be at home, office, or hybrid). It seems like many companies are now willing to trust their creative staff to choose a work schedule that best supports them.

3/4

Almost three-quarters of Creatives are working in their location of choice



64%

of Creatives are Hybrid Workers in 2023



Only

9%

of Creatives want to return to the office everyday



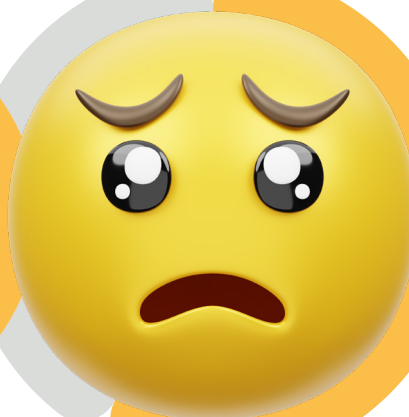
More Resources Please!

Amidst talk of recession and downsizing it was encouraging to learn that 54% of creative teams increased in size last year. However, **more than half of creatives still feel their team is under resourced!** When we surveyed the creative landscape in 2021, we found that 66% of creatives experienced an increase in workload during the year. In 2023, this has increased to 78% as creatives take on more work but without necessarily having the appropriate resources in place.

Increasing workloads and a possible lack of resources may explain why **55% of creative teams needed to use freelancers more** during the last year. While creative teams are comfortable introducing freelancers, offshoring seems to be a model that is yet to fully take off. Only 6% of creative teams implemented an offshoring process during 2022.

58%

of Creatives feel their
team is under
resourced



55%

Used Freelancers
more in 2023

78%

Saw their
workload increase
in 2023

A solution on the horizon?

Creative teams may be looking at respite from workloads and resourcing gaps in 2023.

Of those that admitted to having too few resources, **60% expect to expand their creative team in 2023** and take on more resources!
(pheew)



60%
of Creative teams are
looking to expand
in 2023



Time to turn to tech?

With workloads increasing and creative teams struggling with resources it's interesting to note that teams are still slow to implement software to help relieve pressure.

Only **34% of creative teams are currently using resource management software.**

This increases to 50% for teams of 50 or more creatives.

A marketing resource management solution will help creative teams organise resources, creative processes, marketing operations, content workflows, and data — into a single unified system!



34%

**only 34% of teams
use Resource
Management
Software**

Old Habits Die Hard.

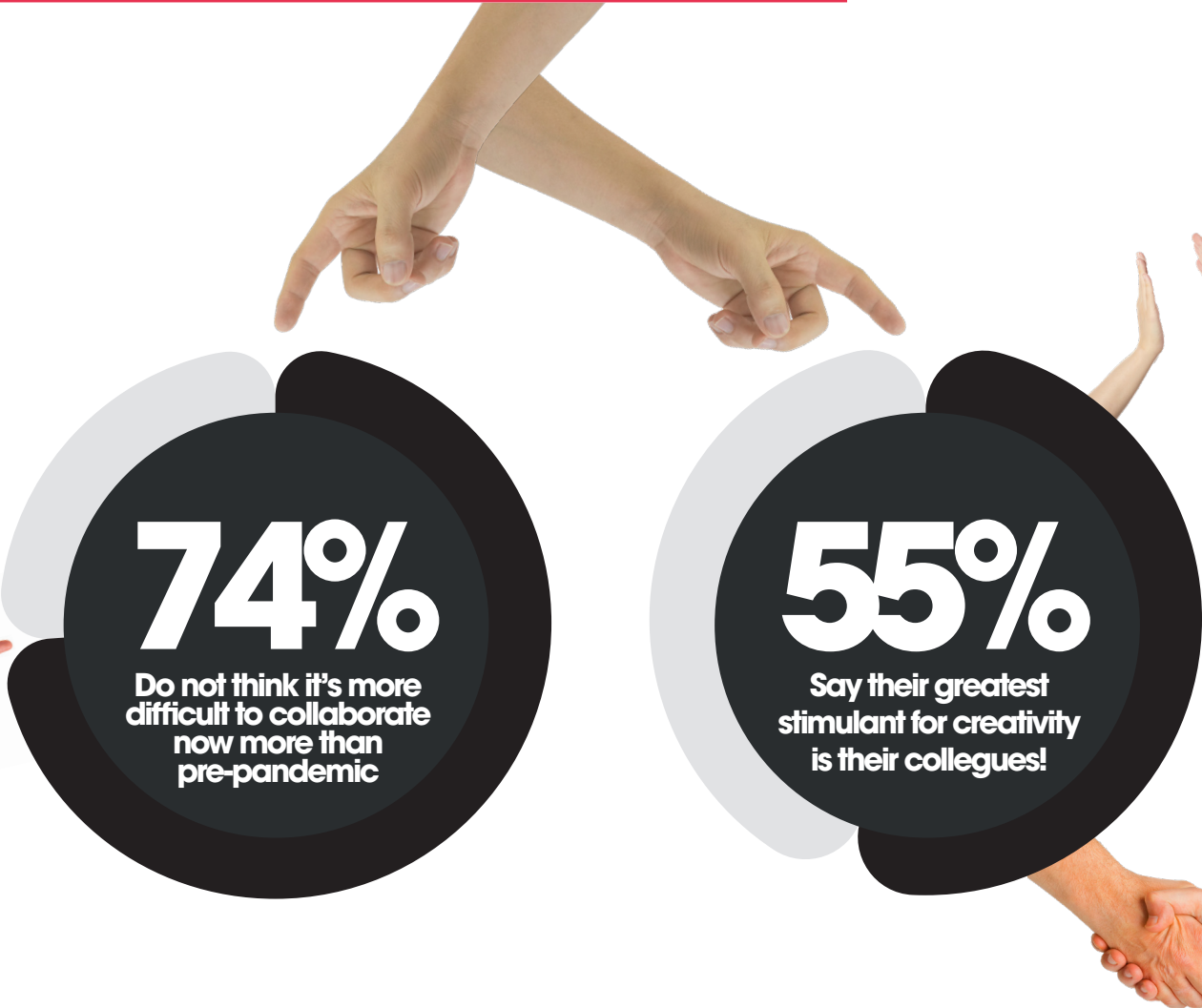
How do you measure and track estimates and costs of projects?



While creatives are often at the forefront of marketing innovation, we sometimes lag behind when it comes to implementing modern technologies. Like trends identified in previous creative operations reports, many teams are still using old school methods to manage creative work.

More than half our respondents did not have a tool for managing briefs and **37% still use email to manage the intake and distribution of creative work**. This trend continues when we look at how many use brand compliance workflows (34%) and creative automation (13%). Later in the report we will see what tools are priority investments for creative teams in 2023. Based on the above, it could be a long list!

Keen to connect



74%

Do not think it's more
difficult to collaborate
now more than
pre-pandemic

55%

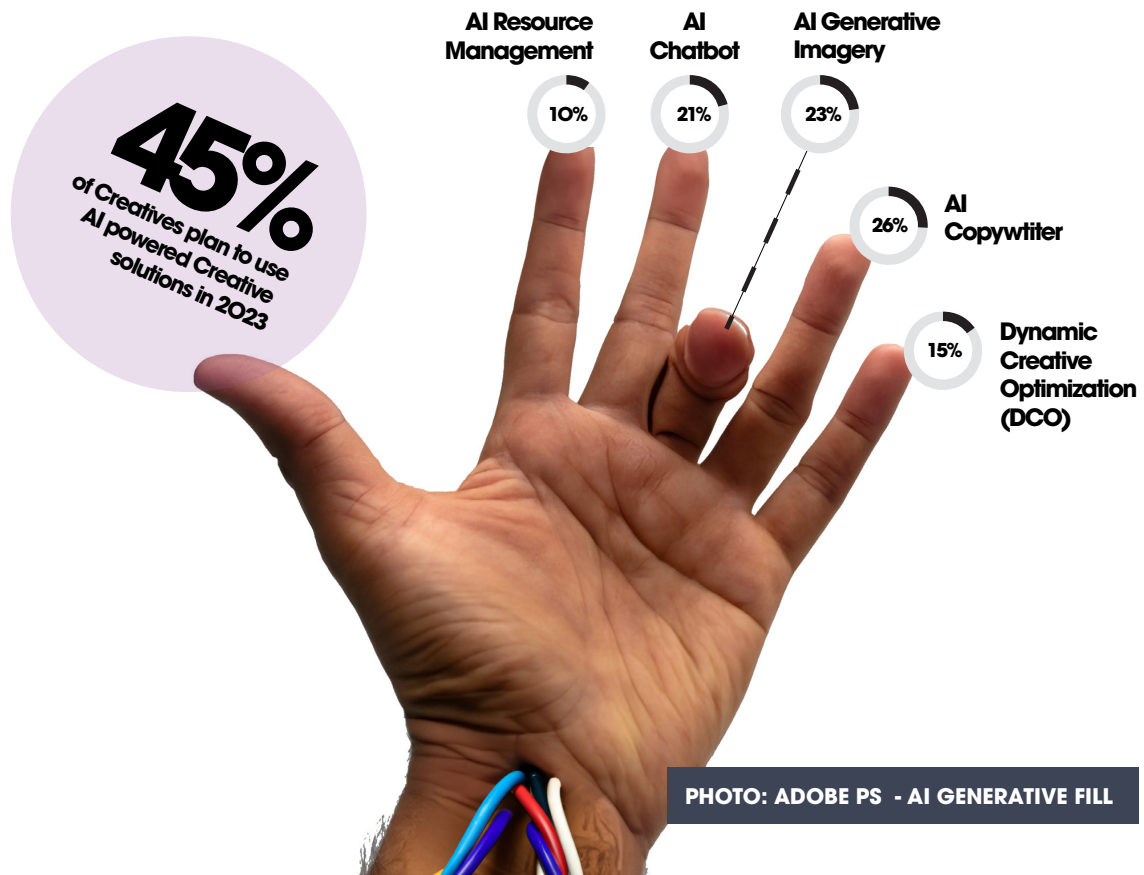
Say their greatest
stimulant for creativity
is their colleagues!

When we surveyed the creative operations community in 2020, we discovered the #1 challenge for creative teams was collaboration. This was unsurprising as creative teams were in lockdown and seemingly struggling to communicate with colleagues.

Fast forward three years and creatives seem to have adapted to the remote / hybrid environment as only 26% think it's more difficult to collaborate now than it was in 2019. It looks like hybrid work is not inhibiting the ability to work together.

The importance of collaboration could not be overemphasized in this year's report. When asked about what stimulated creativity the most, more than half of our creative community said it was their colleagues!

AI in Creative Ops



Artificial Intelligence has firmly become part of the creative lexicon since our last edition of The State of Creative Operations in 2021. AI in creative operations used to be a futuristic idea, maybe even an idealistic notion. The explosion of ChatGPT and AI generative imagery in 2022 forced all creatives to think about accepting AI in their role.

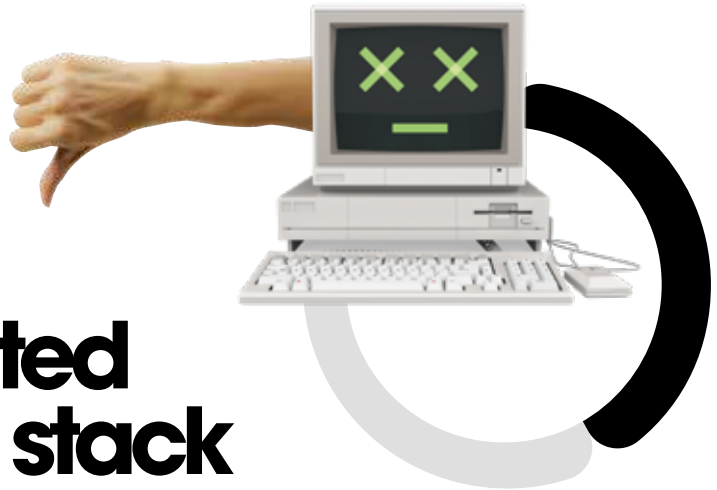
In The State of Creative Operations 2023, we found that almost half of creatives are using AI in some form today. However, it looks like those who are predicting that robots will replace us (we've heard that one before) will probably have to wait. Only ¼ of creatives trust ChatGPT for writing blogs, social posts, and other forms of marketing copy. Furthermore, even less are leaning on AI for image creation in 2023. AI is here to stay but it may take a while to be fully endorsed by the creative community.

What is AI powered Resource Management?

AI can help identify the best candidate for a project, predict future bottlenecks, and suggest optimum work schedules.

The 2023 Creative Tech Stack

42%
of creatives
are disappointed
with their tech stack



Managing a tech stack and maximising technology's impact is a huge part of the modern marketer's role. In the 2023 MarTech map, there were more than 11,000 vendors offering marketing solutions. Even though there's never been more tools to choose from, 42% of our creatives are still dissatisfied with their tech stack.

It's not surprising to see that most creatives (91%) are using software in some form to support creative work. Project Management Software is the most used solution with more than three quarters of creatives currently utilizing it.

While most are using project and work management tools, there are clear gaps in the 2023 creative tech stack. Less than half our respondents have a system in place for resource management, time tracking, financial software, or proofing. Is this why almost half of creatives feel inadequately supported when it comes to technology?

What tools are creatives using in 2023?

75%	Project Management Software
34%	Resource Management Software
45%	Workflow Management Software
28%	Online Proofing Software
13%	Creative Automation Software
47%	Digital Asset Management Software
35%	Financial Software
48%	Time Tracking Software
9%	None

The Creative Buyer in 2023

Although 32% of our creatives revealed they have less budget in 2023, more than 90% plan to invest in at least one supporting solution for creatives this year. While most respondents have a project management solution in place already, 42% of those who are currently employing a project management tool are looking for a new one in 2023.

Creative automation is an interesting inclusion on the priority list with almost 30% ready to adopt the model. Currently, only 17% have a creative automation tool in place which would suggest many first-time buyers will be generated in 2023.

What % of creatives are in the market for new tools in 2023?



38%

Project
Management
Software



31%

Resource
Management
Software



36%

Workflow
Management
Software



16%

Online
Proofing
Software



29%

Creative
Automation
Software



30%

Digital Asset
Management
Software



17%

Financial
Software



17%

Time
Tracking
Software

Finding the right solution.



Challenge when buying software is...

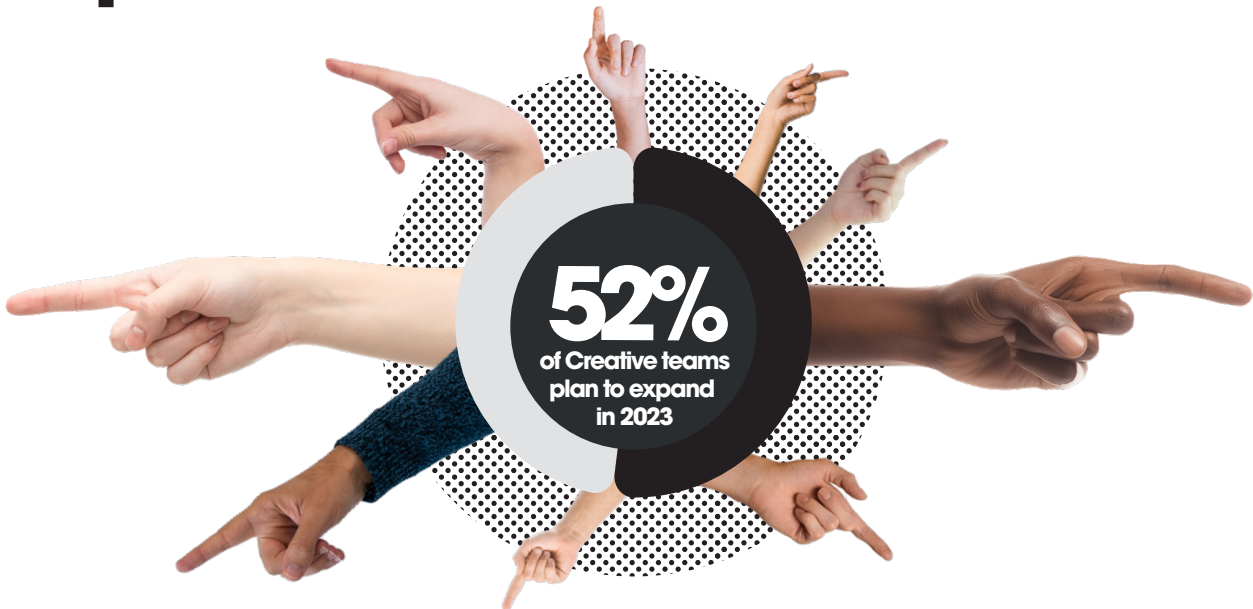
Finding one that meets all requirements.

Navigating the marketing technology market can be overwhelming. As mentioned earlier, there are several thousand vendors offering solutions for every pain point you can imagine. But what do creatives think are the main challenges when it comes to buying technology?

Looking at the closeness of the results, it seems like this is quite subjective and personal. We can see that 42% of creative struggle to find a solution that meets their unique requirements. Almost the same number, 40%, think they just don't have enough time to properly research and procure new technology.

Internal decision-making issues (30%) are also a big blocker for creative buyers while budget is the #1 challenge for just 13% of our respondents!

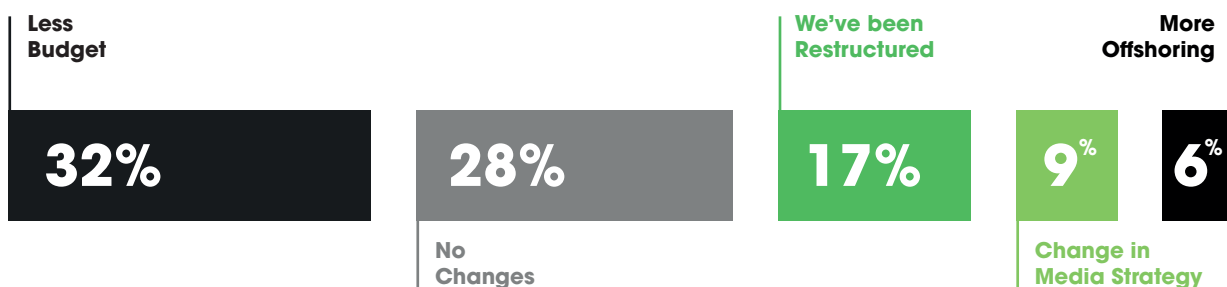
Expand or Contract



Despite the negative headlines, it looks like the outlook for creative operations is much more positive than you'd be led to believe. Last year, 55% of teams increased in size and almost the same number expect their creative resources to grow in 2023 again!

While 32% of our creatives saw a reduction in budgets for 2023, only 10% plan to downsize as a result. When asked about 2022, we found that 17% of creative teams had decreased in size. Let's hope that the trend of layoffs and restructuring has passed and that it's all blue skies ahead!

How has the current economic climate impacted on your work?



Creative Work The Verdict

62%
of creatives rate the standard
of work in the industry as
good or very good

We have seen that creative teams are continuing to increase in size and that workloads are growing year on year. But what about the standard of work? Is it increasing too? Or do we think standards are slipping due to workloads, reductions in budgets, or more pressure?

Evidently, the creative community considers the industry to be blossoming amidst the bedlam. More than 60% of our respondents deemed the standard of work in the industry as good or very good. In addition, it's encouraging to see that only 5% considered current standards to be poor. Thus, it looks like creative teams are continuing to be able to block out the noise and produce high quality content.

Here are some of the organisations that our respondents recognized as doing creative operations particularly well!



Top Ads in 2023

Lastly, we asked our community if there was a particular ad or campaign that caught their eye in 2023. It was noticeable that most suggestions related to socially conscious campaigns. Purpose-driven marketing is becoming ubiquitous inside big brands, and it seems like consumers are welcoming this development. Here is a sample of some of the top campaigns in 2023 as voted by our creative community!



Dove (thru Ogilvy) -
Reverse selfie campaign
in North America



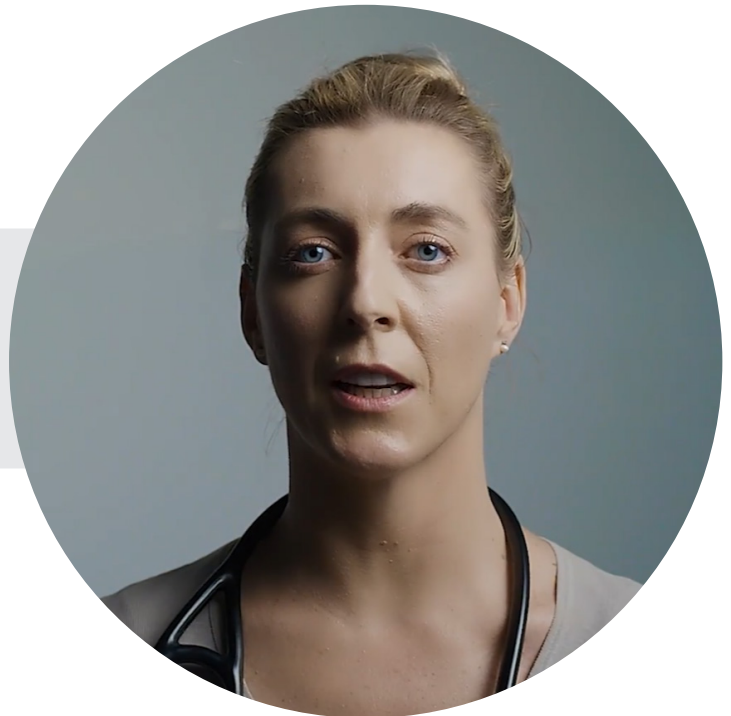
Dunkin'® (thru Artists Equity)
Drive Thru commercial with
Ben Affleck for the Super Bowl

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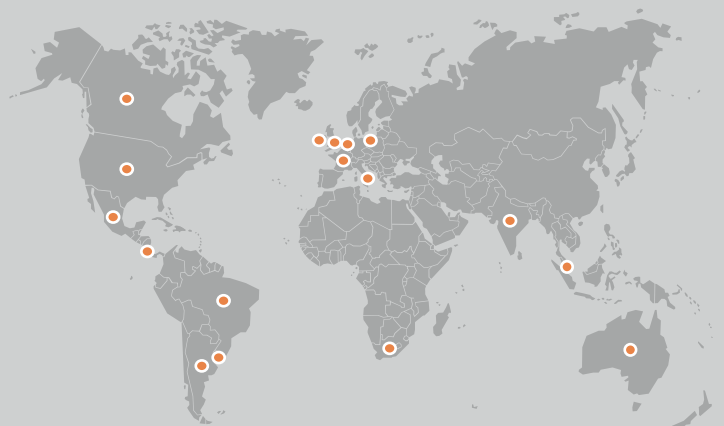
Shelter (thru Yonder Media
and Imagen Insights)
**Homelessness Awareness
Campaign** in UK

**Breakthrough Cancer
Research UK** (thru The Brill)
Fundraising drive in UK



An Post (thru Folk
Wunderman Thompson)
Tin Man Christmas
Campaign 2022

101
Respondents

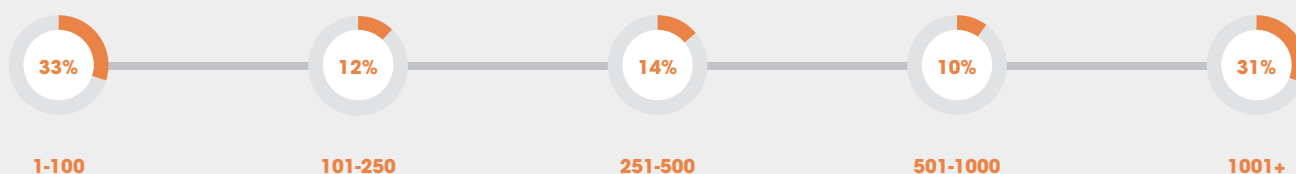


C-Level Executives Creative Directors Creative Services Directors Project Managers
Heads of Operations Heads of Design Marketing Directors Heads of Accounts Studio Managers

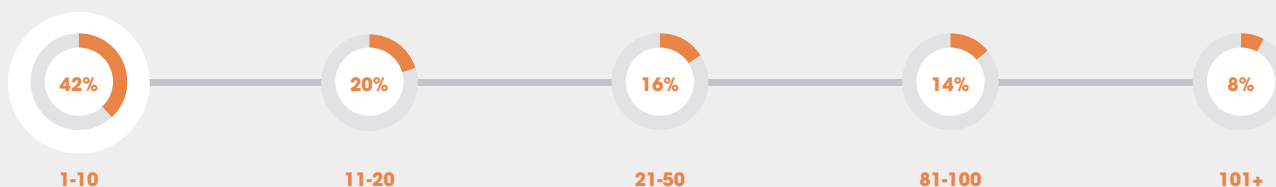
What type of organisation do you work for?



What size company do you work for?



What is the size of your creative team?



About Screendragon

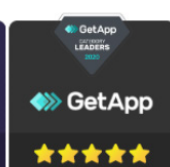
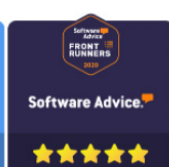
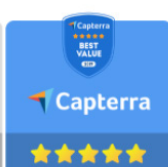
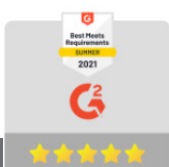
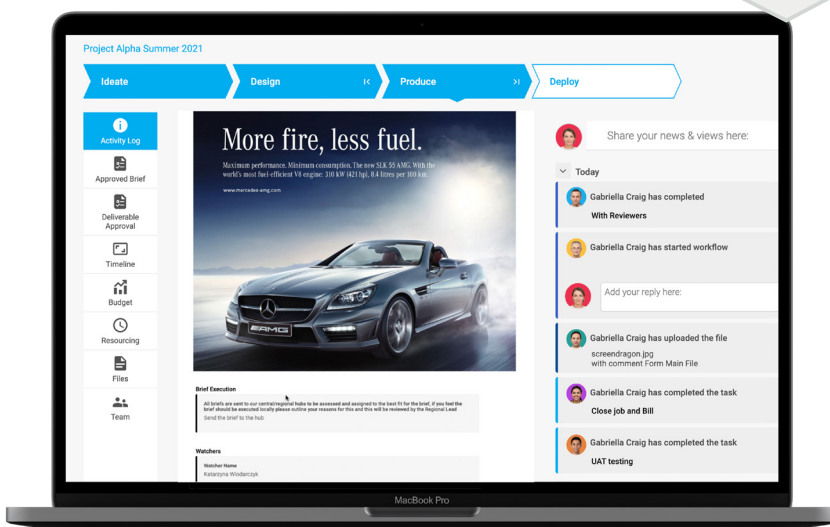
Screendragon is a leading work management solution designed for the needs of marketing, agency and professional services teams. We have been working in the creative operations space for over 15 years, driving efficiency and cost-saving gains for global brands and agencies like Kellogg's, Keurig Dr Pepper, TBWA and McCann World Group.

Screendragon provides high-performing teams with a single software solution to manage their entire creative process – from project initiation to execution and delivery – combining project, resource, workflow and budget management. It is proven to scale for the needs of global Fortune 100 companies, helping them to solve big complex operational challenges. Design thinking is at our core and our unique UX enables fast adoption by all.

Book a demo today or get in contact with our experts to discuss your unique use case.

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Email: sales@screendragon.com



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