The State of Work in 2023:

A radical rethinking of work is underway.

Commissioned by

Adobe

S&P Global
Market Intelligence

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Introduction

Work is undergoing the most rapid and substantial transformation it has ever experienced. An aggregation of work-related challenges is clashing with demands from leaders for more operational agility and growing expectations from employees regarding their day-to-day experience. Resolution of those clashing forces will require more than piecemeal change. Work transformation will require new operational cultures; a more nuanced understanding of what constitutes modern, effective collaboration; and more intentional technology strategies to underpin all work processes. Navigating this shift will require significant change management efforts, and technology will be integral to how businesses redefine the value they create for both employees and customers. Work has changed. Expectations around it have changed. What defines the optimal ways of working is being defined right now.

Methodology

This report was commissioned by Adobe and conducted by S&P Global Market Intelligence. It references data from two sources. In February and March 2023, S&P Global Market Intelligence surveyed 803 business leaders at director level and above about how work happens in their organization. Respondents came from a range of vertical industries and business domains in organizations in Australia, Canada, France, Germany, New Zealand, the US and the UK. In April and May 2023, S&P Global Market Intelligence conducted in-depth interviews with senior leaders in IT and marketing functions, diving deeper into key themes that emerged in the survey responses. A more detailed breakdown of the firmographics and respondent demographics from the survey can be found at the end of the report.

Challenges in modern work

Multiple hurdles impede businesses' efforts to reimagine work across the organization. None of them are easy to resolve, and collectively, they create a context that demands a less piecemeal, more radical rethinking of work. The survey results highlight the following four key challenges.

Pervasive friction

Many employees feel overwhelmed after the last few tumultuous years, and much of what makes work effective is now harder to achieve. The research shows, for example, that 62% of employees find it harder to understand their company strategy, articulate their own goals or stay informed about what their colleagues are doing. More than half (59%) find it more difficult to maintain a positive work-life balance or stay on top of growing workloads. Nearly half (48%) struggle to build trusted relationships or to work effectively in cross-functional capacities.

Many of the fundamentals of effective work are now more difficult to get right

- Being "on the same page" with colleagues
- Having clarity in my own goals and responsibilities
- Understanding my organization's strategy
- Understanding the status of projects I am working on
- Finding and sharing the information I need

62%

- Keeping on top of a growing workload
- Keeping a positive work-life balance

59%

- Developing trusted relationships with colleagues
- Collaborating cross-functionally with colleagues in other teams

48%

Q. Which of the following, if any, have become more challenging over the past three years?
Base: All respondents (n=803).
Source: S&P Global Market Intelligence and Adobe custom State of Work survey.

Crisis of leadership

A second challenge is that leadership expects change but often does not know how to lead change. In our survey, a majority of respondents report that senior management is not providing the right technologies to support day-to-day work (70%), not showing consideration for the general well-being of their teams (70%), not distributing work appropriately across teams (69%) and not being transparent (65%) or providing enough clarity regarding goals and responsibilities (63%). This shortfall in credibility indicates a deficit of strategy, focus and skills. If not addressed, this could further corrode productivity and engagement; consequently, it also risks damaging the customer experience (CX). Leadership must consider how to lead the significant change management that is necessary to drive workforce transformation.

Organizational leadership is struggling to meet core workforce expectations

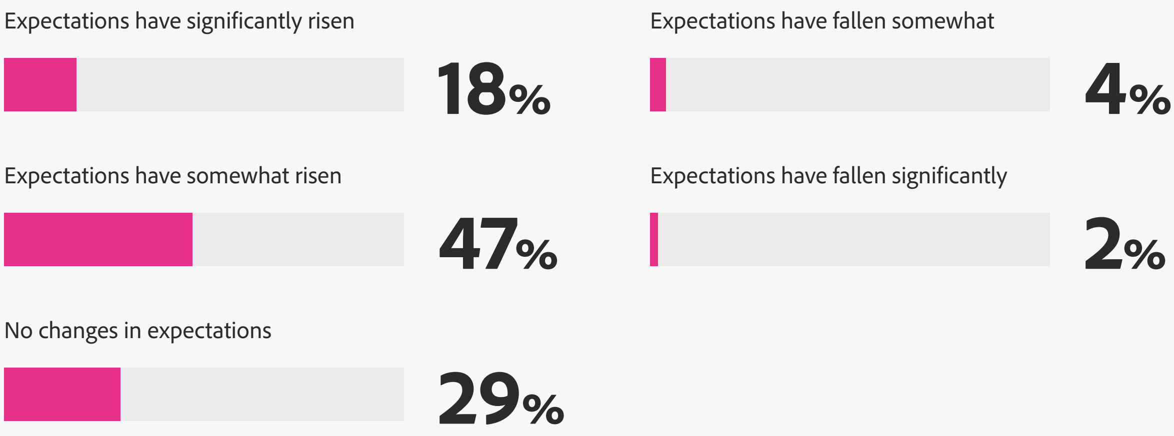
Q. Which of the following statements describe your experience with management in your organization?
Base: All respondents (n=803).
Source: S&P Global Market Intelligence and Adobe custom State of Work survey.

Siloed and underfunded technology strategies

A third challenge businesses face is that they need more joined-up thinking in their technology strategies to create and support the experience-led outcomes that customers increasingly expect. Yet employees are struggling as they work in and out of too many technology and operational silos. Businesses need to see their employee and customer experiences as an infinity loop, each continually impacting the other, not as a separate series of outcomes.

Businesses need technology to reduce friction across work and make room for the creativity and collaboration that will power growth. Employees want better experiences — 65% of our survey respondents say their expectations for the tools they use have risen in recent years. They want more automation; better ways to collaborate, create their own workflows and manage key projects; and more data to inform best practices. And yet, 41% of senior managers are concerned that the economic downturn will mean a smaller budget for technology to make these important changes.

Employees are expecting more from their day-to-day technology experiences



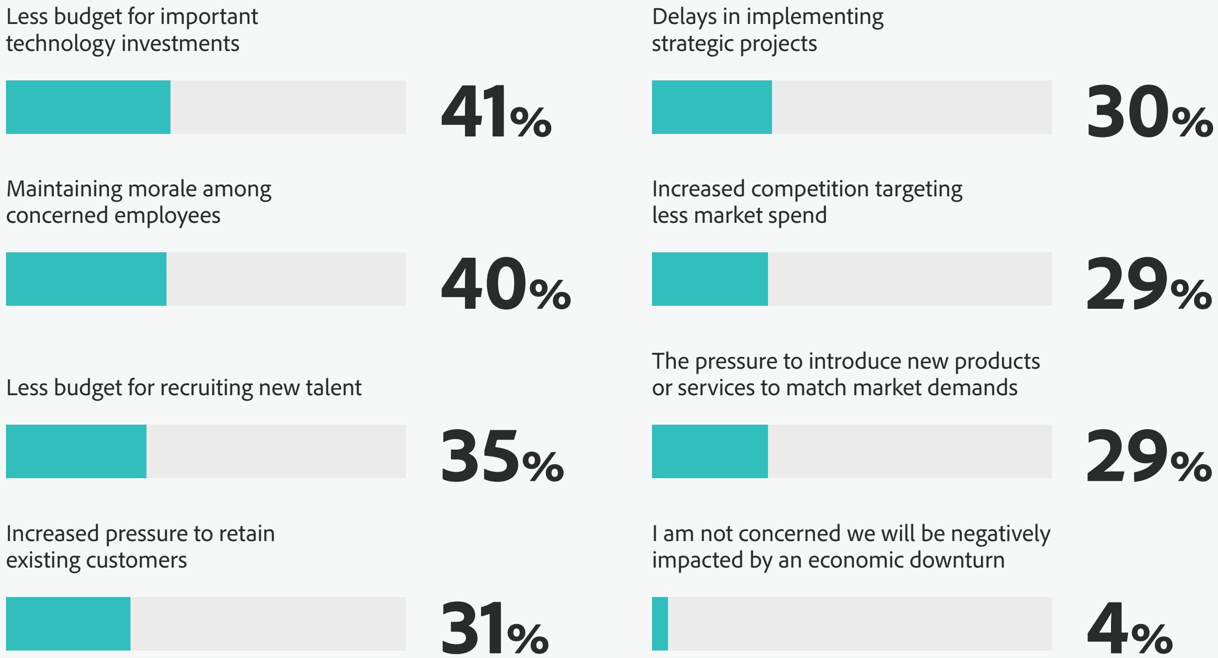
Q. Over the past few years how have your expectations changed, if at all, when it comes to working with different applications and other technologies day-to-day?
Base: All respondents (n=803).
Source: S&P Global Market Intelligence and Adobe custom State of Work survey.

An uncertain external environment

The fourth main challenge is continued external uncertainties. More than half (56%) of survey respondents are concerned about the economic downturn impacting their ability to execute on their goals. A smaller budget for technology investments is the primary worry, followed closely by weak morale across the workforce, less of a budget to hire new talent, more competition for less market spending overall and delays to strategic projects.

These four challenges constitute strong headwinds for businesses. They need to respond with new operational cultures to create more satisfying experiences for employees, so that employees in turn can create experience-centric customer innovations to drive the growth of their organizations.

There are significant concerns about the consequences of the economic downturn



Q. Which of the following are your biggest concerns when it comes to an economic downturn impacting your ability to execute on your goals and responsibilities?
Base: Respondents who said "very concerned," "somewhat concerned" or "not really concerned" about an economic downturn impacting their ability to execute on your goals and responsibilities. (n=713)
Source: S&P Global Market Intelligence and Adobe custom State of Work survey.

New operational cultures and values

Alongside these challenges, new ones are emerging, such as how to adjust to impactful new technologies such as generative AI. This rapid change is making traditional ways of organizing, equipping and motivating workforces less relevant. Organizational hierarchies are flattening as companies search for more operational agility to compete in volatile markets that are shaped by digital and other kinds of transformation. With each year, employees expect more autonomy and flexibility in how they work — in the location, hours, practices and technologies they use. But at the same time, employees want more direction around their target outcomes. New operational cultures need to embody "aligned agility" — providing maximum flexibility around the "how" of work, with tight consensus on the "what" and "why."

Autonomy

In our survey, 75% of respondents said at least one of the following things: that they want to make more decisions outside of hierarchical chains of command; that they want more say over their responsibilities or how they go about getting their work done; or that they want the opportunity to provide more input regarding divisional goals. Employees want to act more quickly, and their organizations want them to do so, but leaders need to realize that preserving established hierarchies and rigid practices will not deliver that result. Instead, employees need to be empowered to determine the ways they work best and to shape how they deliver against their goals.

Employees want more autonomy regarding decision-making and goal setting

- Making more decisions outside a hierarchical chain of command
- Having more say over my goals and responsibilities
- Having more say over how I go about getting my different tasks done
- Inputting more into divisional or organizational goals

75%

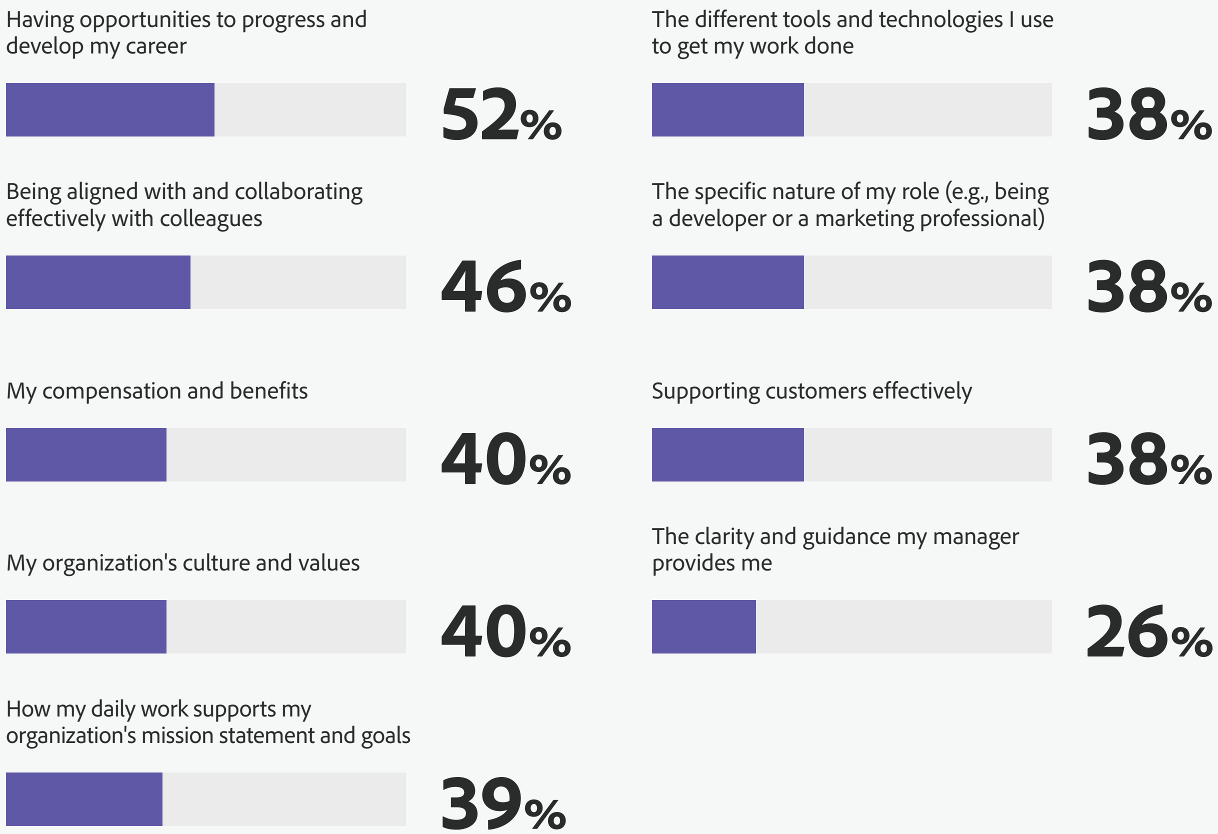
Q. If you could have more autonomy in how you get your work done, which of the following would be most impactful to you?
Base: All respondents (n=803).
Source: S&P Global Market Intelligence and Adobe custom State of Work survey.

On the technology front, businesses face a dilemma. Employees outside of IT are generally not getting the experiences they want from the tools they are given — as noted above, 70% do not believe leadership is ensuring that the right technologies are in place. Yet employees don't see it as their responsibility to determine a better arrangement. In fact, only 27% of our survey respondents want more say over what technologies they use. This shows how important it is for operational cultures to facilitate conversation between decision-makers and users about how technology, culture and outcomes weave together.

Alignment

Employees want more autonomy, but they also want a tight consensus around the "what" and "why" of work. This requires that managers and leaders provide direction. One of the factors that makes employees feel engaged at work is being aligned and collaborating effectively with colleagues (46%), behind having opportunities to progress and grow their careers (52%). Other factors that positively affect employee engagement are organizational culture and values (40%) and compensation and benefits (40%). Lack of alignment is a common obstacle across employees' day-to-day work — on important projects, for example, the main challenges are lack of shared visibility into plans, difficulties reaching agreement on priorities, and people working in functional silos. Employees want to act fast, but alignment is a prerequisite.

Feeling aligned with colleagues positively impacts engagement more than compensation and benefits



Q. Which of the following have the biggest positive impact when it comes to how engaged you feel at work?
Base: All respondents (n=803).
Source: S&P Global Market Intelligence and Adobe custom State of Work survey.

Experience-led growth

In addition to giving employees more autonomy and fostering stronger alignment around goals, organizations need to drive profitable growth by delivering the personalized experiences their customers expect, at scale, while keeping up with an ever-evolving digital landscape. This requires more intentional collaboration between business functions to increase internal agility and efficiency. Businesses need to run a single thread through strategy, portfolio, project and process management to tie together the various teams and their individual tasks. This is the new battleground for workforce transformation: bringing strategy and execution much closer together in a more predictable relationship to close the gap between customer expectations and experiences. Accomplishing this, however, is difficult; only 22% of respondents in our research say they both understand their organization's goals and know how to prioritize across their own work.

This is a big issue — brands cannot afford for their initial vision of products and services to get lost in translation by the time those offerings reach customers. As businesses increasingly compete in an experience economy where success is defined by positive emotional engagement among consumers, the life cycle from initiation through planning, execution, feedback, optimization, and back to initiation, needs to be managed at a high level of complexity, with precision, and at high velocity. This challenge of ensuring that product experiences match customers' expectations is exemplified by the following sentiment from an interview participant:

> "[From] a planning standpoint, for me, the biggest challenge that I have for myself and for our team as we think about the planning cycle is to try to not just rinse and repeat of everything from the year before... we can often sometimes miss just a fundamental shift that is happening in the market, whether it be a consumer dynamic or a governmental dynamic.

Senior vice president of global marketing
Healthcare
United States

Poor execution on getting a basic product to market may be rectified with minimal negative impact. But if a business fails to meet customers' rapidly evolving expectations, it may miss the mark altogether and damage its brand in the process.

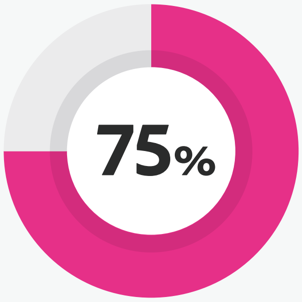
Value streams

Businesses need to find the right ways to bring together the various stakeholders involved in crafting those customer experiences. As one interview participant remarked:

> “ [The] organization is so big that the only way to find who to collaborate with is to go back to org charts, and that is ridiculous in my opinion because there's a lot of wasted time trying to find a name in our chart, send a random email and see if we find the right person.
>
> **Marketing director**
> IT consulting
> United States

A lack of collaboration between CX, product and engineering teams is a top-three friction point in improving the customer experience, according to S&P Global Market Intelligence's Voice of the Enterprise: Customer Experience & Commerce, Budgets & Organizational Dynamics 2023 survey. The data also shows that 75% of CX leaders see improving on this as strategically important, and that organizations are prioritizing investment in technologies that enable data interchange and workflows across those teams.

Bringing product and engineering teams closer to CX teams is a growing priority for businesses



of respondents say **improving alignment and collaboration with product design and engineering teams** is very important for improving the customer experience

Top 3 customer experience platform technologies that would most help organizations meet rising customer expectations over the next three years.

35%
Real-time customer collaboration and engagement tools

33%
Customer experience analytics and intelligence platforms

31%
Using customer experience data for product-led innovation

Top 3 friction points regarding improving the customer experience.

29%
Complexity of existing legacy applications

28%
Collaboration across departments

26%
Keeping up with rising customer expectations

Q. On a scale of 0-10, how important are each of the following strategies for improving the customer experience?
Q. Which of the following customer experience platform technologies, if any, would most help your organization meet rising customer expectations over the next three years?
Q. In your opinion, which are the main friction points your organization faces regarding improving the customer experience?
Base: All respondents (n=500)
Source: 451 Research's Voice of the Enterprise: Customer Experience & Commerce, Budgets & Organizational Dynamics 2023

Operationally progressive organizations are mapping their wider value streams and developing technology, planning and work strategies that bring in data from across their business functions. There is a lot of complexity in doing this well; one challenge is ensuring that a common language is spoken in cross-functional collaborations.

> “[We] really try to ensure that we are speaking the language of the business… through our financial, R&D, operations or the others that will be making either the executional decisions on our product pipeline, or the alignment of funding as we go forward.

Senior vice president of global marketing
Healthcare
United States

Data-driven operations

Bringing stakeholders together across different parts of the business is about more than aligning on goals. It is about having data-driven operations whereby stakeholders can continuously evaluate goals, budgets, workloads, resources and execution in a collective context as well as from their own domain’s standpoint.

Being data-driven also has a positive impact on engagement. In organizations where most or nearly all decision-making is data-driven, 47% of employees say they feel more engaged now compared to three years ago. Working in data-driven organizations has helped employees overcome many of the frustrations that have plagued work in the past few years. In organizations where decisions are less data-driven, fewer employees (35%) are feeling optimistic.

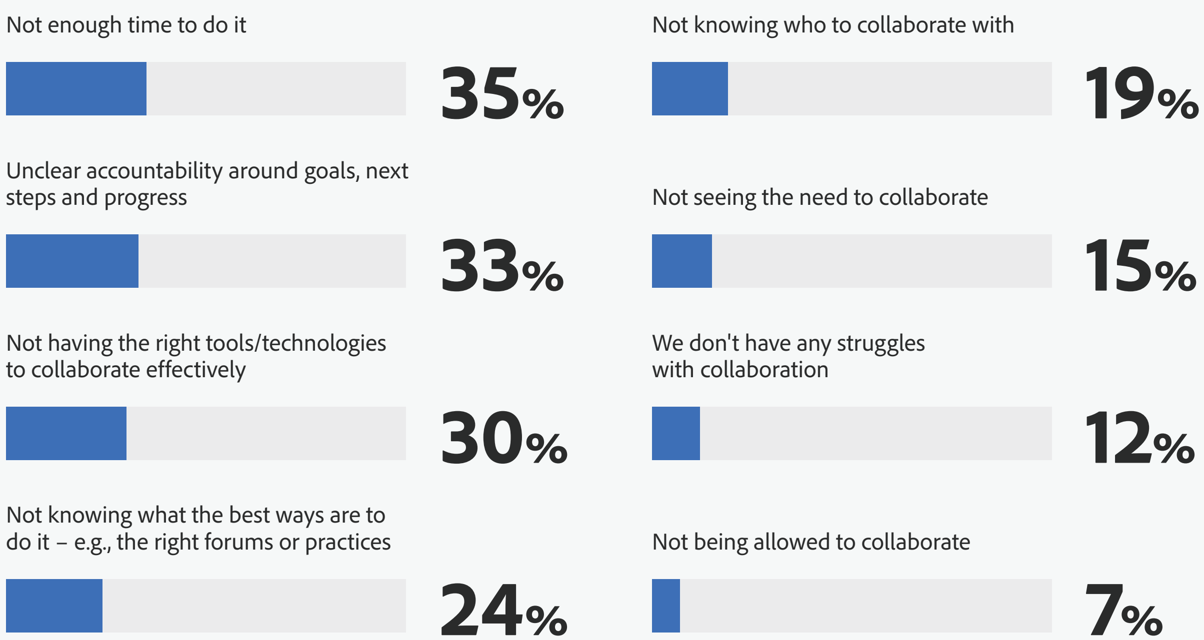
New operational cultures designed to bring the business together in data-driven operations also require new thinking about how collaboration happens.

Rethinking collaboration

Too much of the mindshare regarding collaboration has focused on transactional conferencing, messaging and task management tools. These generate a lot of conversation but can’t be easily used to connect people to their goals and progress, to support creativity and provide workflows that support execution. And yet in the shift to remote work over the past three years, employees have been diving further into these tools with predictable increases in distraction and burnout.

Unsurprisingly, 88% of employees in our survey struggle with collaboration. The main challenges they report are lacking time to do it; having unclear accountability around goals, next steps and progress; not having the right tools to collaborate effectively; and not knowing the best ways to collaborate.

Most employees struggle to effectively collaborate



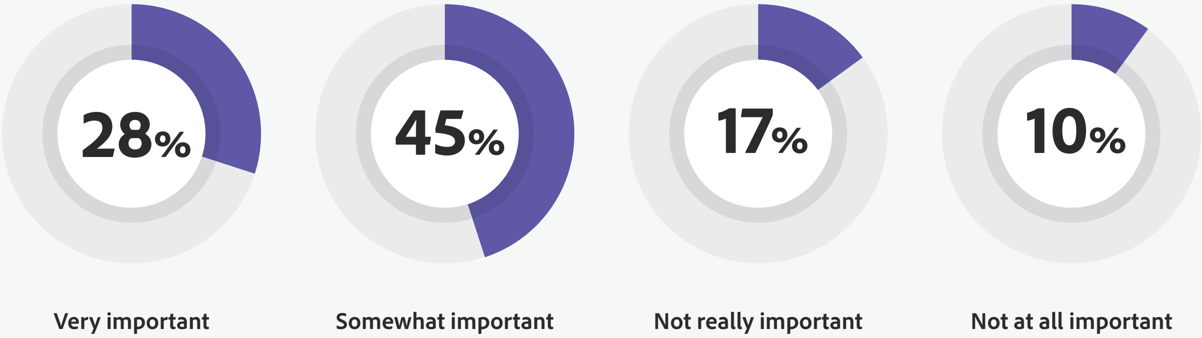
Q. Which of the following, if any, do you commonly struggle with when it comes to generally collaborating with others?
Base: All respondents (n=803).
Source: S&P Global Market Intelligence and Adobe custom State of Work survey.

While these transactional tools can be great supplements for work, they should not be considered the primary venues for valuable collaboration. Instead, organizations should reorient around the following principles and think more intentionally about what tools and practices can support them.

Persistent connection to plans and execution

Persistent connection means having more structure and method for how to track plans, goals and progress; maintaining ongoing awareness of the difference between current and desired states; and more quickly identifying areas for operational improvements. Illustrating this, 73% of respondents in our survey want to see methods such as Agile, Lean or Hybrid reflected in their workflow tools. More than one-third (37%) also say that automated workflows providing updates and notifications across projects is the best technology contributor to successful collaborations. Asynchronous and more structured collaboration can replace much of the low-value conversation. Allowing employees to determine when they provide input makes it easier to continually surface new information and manage important context around key initiatives, and in turn more purposefully shape the actions that are needed to drive work's progress.

Most leaders want methodologies like Agile, Lean or Hybrid to be reflected in their workflow technologies



Q. How important is it for the different applications you use to be able to integrate processes like Agile, Lean or Hybrid into your workflows?
Base: Line-of-business respondents (n=402).
Source: S&P Global Market Intelligence and Adobe custom State of Work survey.

Inclusivity and creativity

Employees are looking for more engaging tools, including those supporting visual collaboration, that are more inclusive of how they think and like to work. Visual forms of collaboration can often better support creativity and can blend structured and unstructured work to satisfy higher-order collaboration scenarios such as ideation and strategic planning. About two in five respondents (38%) say improving their team's creativity in the next year is very important, and an additional 48% say it is somewhat important. Empowering creativity is becoming a key cultural and technology priority for businesses. As one interview participant remarked:

> "[People] are the most creative when their brain is not preoccupied with answering the next email and answering the next project and attending the next meeting; there's no way creativity will grow just out of the box because of the day-to-day that everybody has.
>
> **Marketing director**
> IT consulting
> United States

As shown by this additional quote, creativity is no longer considered relevant for only the “creative” professions:

> “I went to the Cannes advertising awards in France last year on behalf of my company, and I was surprised to see the pivot of how they communicate: They call it the world’s largest international festival of creativity, and creativity is not just for marketers; creativity is for R&D, creativity is for operations teams, for example.
>
> **Senior vice president of global marketing**
> Healthcare
> United States

Non-linear outcomes

Organizations are increasingly seeking collaboration for use cases beyond specific projects or work streams, such as supporting knowledge transfer across teams, improving skilling, building culture, driving engagement and promoting internal mobility. For example, as employees seek more autonomy in their roles, the desired opportunity they mention most often is to work with different teams to both contribute and learn (35%). As we highlighted earlier, almost half of leaders are finding it harder to build trusted relationships and work effectively in cross-functional capacities. Therefore, there is significant value in thinking of collaboration not just as project-centric but also as critical to building relationships, developing skills across the workforce and driving stronger engagement.

New technology strategies

Establishing new operational cultures and rethinking collaboration requires a different technology outlook — one that supports people working together effectively. Employees want fewer silos, more integration across their key tools, more data-driven insight into best practices and more automation as a natively delivered part of their experience as they work with different systems.

Scaling the content supply chain

The experience economy is driving demand for more personalized content, which requires more sophisticated ways of managing the "supply chain" of content from ideation through its delivery and the measurement of its impact as part of a specific customer's experience. Doing that with velocity and at scale is greatly frustrated by having that life cycle fragmented across technologies that may or may not integrate well with one another. As one interview participant noted:

> "[To] this day, the building of marketing content is completely disconnected and separate from the leads and opportunities that marketing content generates, a need that is completely separated from the actual reporting on the results of those leads and opportunities that the content created… there's no consistent way or a standard way that everybody can go through for the whole project.

Marketing director
IT consulting
United States

To illustrate the scale of the problem, 87% of respondents say they struggle with managing content through the life cycle. This indicates significant potential for new generative AI approaches to remove some of the friction and convert laborious and disjointed tasks into much more streamlined and automated workflows. It can expedite how high-quality content is generated and streamline how it is managed across the content supply chain. This will help bring stakeholders together and make valuable content more easily accessible across a business's value streams, which in turn could significantly support alignment across them. However, many businesses are understandably cautious about generative AI, as reflected in one of our in-depth interviews:

> " Regarding generative AI, there's interest in that technology… we are currently assessing its potential, but we won't do anything about it 'til we have understood better the concerns around data privacy, security and safeguarding the data that goes into those models compared to the value they provide.

IT director for enterprise architecture
Consumer products
United States

Significant friction exists across the content supply chain

33%
Measuring the impact of content

31%
Coordination to prevent duplication of content

27%
Customizing content for different audiences and channels

25%
Updating stale content

25%
Unclear roles and responsibilities

23%
Governance around all your content assets

17%
Format changes

13%
I don't struggle with any of these

Q. When it comes to managing different content assets through their life cycle, which, if any, of the following do you struggle with most?
Base: Line-of-business respondents (n=402).
Source: S&P Global Market Intelligence and Adobe custom State of Work survey.

Mitigating technology silos

The desire to increase integration across the content supply chain speaks to the wider issue of fragmentation. Our survey shows that most employees are struggling to work across too many apps (68%), and many report a lack of automation across tools (25%), as well as difficulties in creating the right workflows (21%). We asked respondents what would most help employees collaborate effectively, and the two factors they mentioned most frequently are having automated workflows and updates to streamline processes and having a consolidated application where more of their work happens.

It is little surprise, then, that collaborative work management (CWM) tools are regarded as having the strongest game-changing potential over the next one to two years, among a list of 11 technologies that we asked respondents to rank. This is the case across the board — respondents in CX roles, in back-office and support roles, in IT and in production and engineering all ranked CWM first. Enterprises are increasingly implementing CWM tools beyond discrete users in marketing or project management to support the more strategic kinds of workforce transformation that need to happen to drive experience-led growth.

Interest in CWM tools points to a wider shift in the technology landscape toward more consolidated software offerings. This means organizations are moving away from the best-of-breed focus that characterized much of the first era of SaaS to more of a best-of-suite decision. The following interview response illustrates this shift:

> “Every organization struggles between centralization and decentralization down to area and country levels. We need more centralization and more standardization of some of those tools, some of those aspects, at a central level and one where the governance of intentionally integrated together versus what are Frankenstein tools that do not connect and do not speak to each other and can contradict each other. So, for me, that is an area of significant opportunity.

Senior vice president of global marketing
Healthcare
United States

Correspondingly, we see technologists in enterprises begin to develop new digital workforce technology strategies based on a "hub and spokes" model with strategic platforms supporting key workflow, data, content and information management requirements, and ecosystems of niche applications continuing to integrate into these platforms.

This should also go some way to satisfying IT's concerns — 34% are concerned about the security implications of the growing number of applications their workforce is using. As one interview participant noted:

> "[In] a traditional siloed environment, you believe that you are following [international regulations], but you do not know. But as you pull things into a single source of truth, you have a higher elevator of knowledge on what's compliant and what's not compliant. So, that is where there is a big difference in that.
>
> **Global IT director**
> Retail
> United States

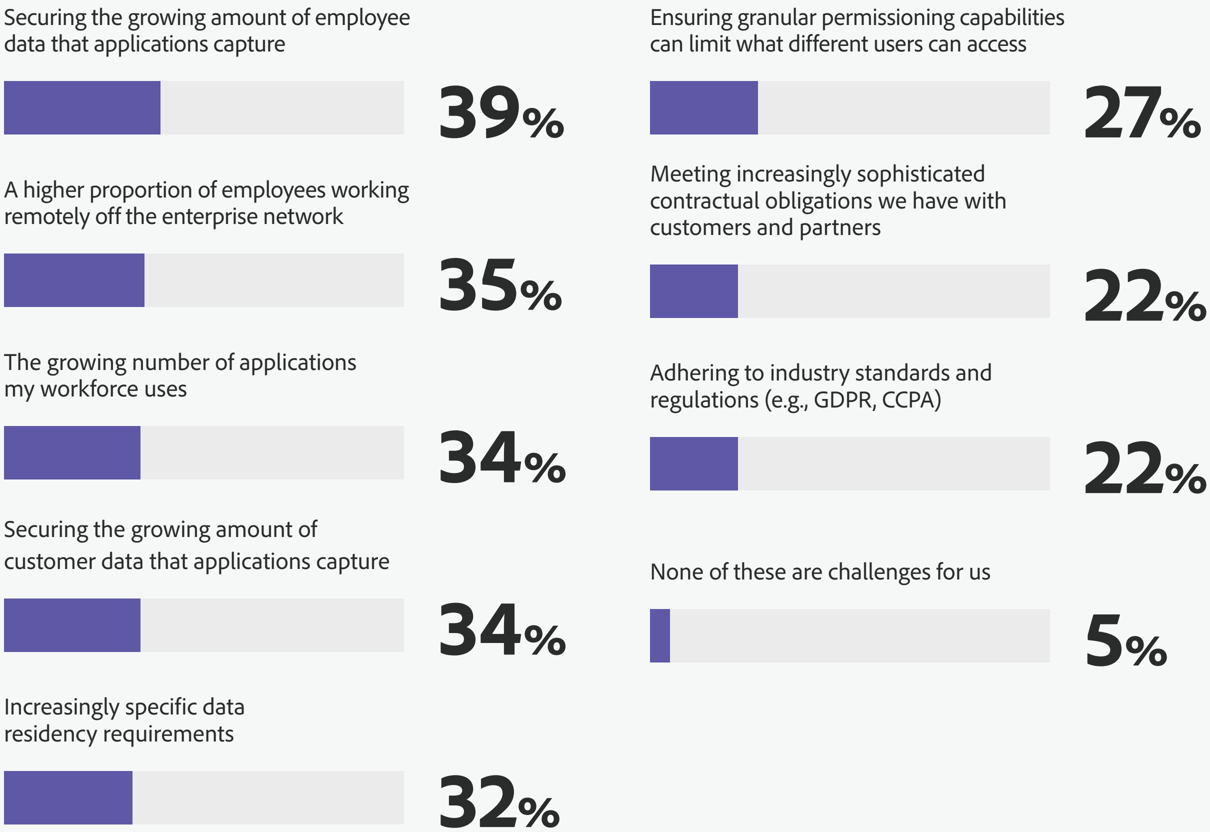
And yet, for some, such consolidation entails an inherent risk that needs to be balanced:

> "Having a single source of truth is always beneficial. It's easier to integrate against it, and it is easier on multiple aspects; it's simpler to implement it. However, when there are some issues with the vendor, then you lose everything. Even though we recognize that this is a lot of added value, we're not doing it, because we don't want to put all eggs in one basket.
>
> **Senior director of IT**
> Financial services
> United States

Balancing security and usability

Another important observation is that just a few years ago, the security restrictions that IT departments placed on technologies were less challenging to navigate. In this survey, IT security restrictions are the second-most-frequently cited technology challenge. This mirrors 451 Research's Voice of the Enterprise: Workforce Productivity & Collaboration, Work Execution Goals and Challenges 2022 survey, in which the same issue shot up the list of technology challenges. Among IT's top concerns are securing the amount of customer data (39%) and employee data (34%) that their businesses are capturing, and doing so while more employees work remotely (35%). While IT's impulse is understandable, there needs to be nuanced conversation about how to provide guardrails for access to data and other important information, and technology capabilities must support that.

IT has widespread concerns about how to secure the organization's applications and other technologies



Q. Which of the following are significant challenges when it comes to securing the different applications and technologies that your workforce is using?
Base: IT respondents (n=401).
Source: S&P Global Market Intelligence and Adobe custom State of Work survey.

The following two quotes from interview participants reflect this tension:

> “IT must become a strategic partner of the business, enabling them to do what they need to do to grow, whether that be through organic or however the business direction is. But IT needs to realize that they are there to support the business, and not the other way around.

Global IT director
Retail
United States

> “Even though [no- and low-code] is a good thing, in some cases, it’s an issue for us. We see that many vendors… constantly introduce recent technologies described as low-code solutions, which empower users to create automation or workflows much faster. As I'm part of IT and I'm in charge of all those technologies and integrations, it’s great. However, that creates a rogue IT organization.

Senior director of IT
Financial services
United States

Satisfying outcomes beyond productivity

The traditional narrative regarding employee engagement was centered on compensation, company values and the manager relationship. All of these remain important, but what requires more attention is the ways in which the technologies and tools provided to employees impact their engagement. In fact, according to our Work Execution Goals and Challenges 2022 survey referenced above, technologies and tools rank as the third-strongest statistical driver of positive engagement for respondents, after enjoying their work environment and feeling that they have opportunities to grow their career. Work quality is determined at least in part by how positively or negatively employees feel, and a large part of that sentiment is based on the experiences they have in doing work. Technologies play an increasingly important role in that experience, to the extent that 16% of senior company leadership respondents (VPs and above) say they would leave their organization for a role elsewhere if it could be guaranteed that they would be working with a better technology stack.

Conclusion

Clearly, many challenges have arisen following recent changes to where and how work happens, as well as how both company leadership and grassroots employees perceive it. Much precedent is being discarded, and new strategies and practices must fill the gap. Tinkering around the edges will only create more operational friction and drive disengagement. The scale of change needed is too significant not to be treated as a transformation priority.

So, what can those navigating this rapid change do?

1. **Lead a transformation of work, not a stagnation.** Designing for optimal work is not a one-and-done undertaking; it requires continual orchestration. If leadership only tinkers with how work happens across the organization, the result will be weaker productivity, and both workforce and customers will likely disengage from the experience the business is providing. Instead, adopt a transformation mindset — be clear about where stakeholders sit within the organization's business value streams, and work relentlessly to provide clarity regarding goals and expectations, foster alignment across teams and make continuous operational improvements in how work gets done.

2. **Reimagine and elevate collaboration.** People are every organization's primary asset, and they spend a significant and growing amount of their time collaborating. It is essential to get this right. Use collaboration to support teams' persistent connection to their plans and execution; ensure that collaboration is engaging and inclusive and can unlock people's creativity, and that it satisfies other valuable outcomes beyond productivity, such as building relationships, developing the skills base across the workforce and driving stronger engagement.

3. **Plan to exchange data, information and workflows across the organization.** Ensuring that everyone understands organizational strategy and has their own goals is not enough. Increasingly, different business domains are being knitted together into more data-driven operations as they align to deliver more optimal customer experiences. This more structured collaboration is occurring, for example, between engineering, product and operations, marketing and other CX teams, with new ways of working and mutually useful guardrails also being created with back-office functions.

4. **Get in step with employees.** Organizational hierarchies are flattening to support greater operational agility and to meet employees' expectations for more autonomy and flexibility around how they work. Make sure strategy reflects this, but also recognize that employees want tight consensus on the "what" and "why" of their work. Employees want flexibility in work execution, but they also want clear definition of goals and guardrails around expectations and compliance so they can maintain their velocity.

5. **Understand that the experience economy raises the bar.** In an experience economy, a business cannot afford for things to get lost in translation between the vision for how to engage customers and what actually happens. Considering these changes, organizations will likely want to lean into workforce technologies, including promising new ones such as generative AI, to ensure a high level of complexity, precision and velocity from idea initiation through planning, execution, feedback and optimization.

Adobe

Reimagining work for everyone in the organization takes a solution with the flexibility and scale to make it happen. Adobe Workfront is the most comprehensive collaborative work management solution on the market today. Built for the way people work, it connects all work across the organization in a single source of truth, providing better visibility, effective collaboration, improved decision making and optimized and automated workflows. Work is directly aligned to business outcomes and everyone has more time to be creative and innovative, every day.

Learn more about how Adobe Workfront fundamentally changes the way work gets done.

About the author

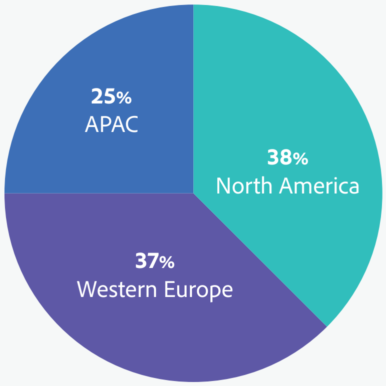
Chris Marsh is a Research Director for S&P Market Intelligence in the TMT division's Experiences Group.

He leads a team of expert analysts and provides compelling market and competitive intelligence around the technologies supporting enterprise management, agile planning, workforce transformation, business automation, employee and customer experience strategies and product-led growth.

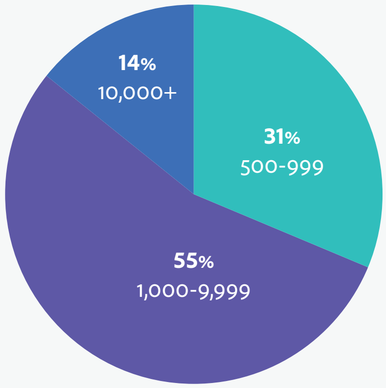
His teams support CEOs, CMOs, CPOs, strategy, corporate development, communications, analyst relations, senior product marketers and product management teams.

Chris has been a technology analyst since 2008.

Survey demographics and firmographics



Country location



Global employee count

Are you into Information Technology (IT) or line of business (LOB)?

LOB – my role sits outside of the IT function; I work in a business division such as operations, management, finance

50%

IT – I work in an IT function involving the management of applications, systems, hardware/software, data management

50%

100% of respondents are currently employed full-time and managing a team

Involvement in purchasing decisions

I am involved in or influence the productivity and collaboration technology purchases at my organization

55%

I am a decision maker of productivity and collaboration technology purchases at my organization

45%

Current job title

36%	27%	17%	14%	6%
Director-level	C-level (CEO, CTO, CIO etc) / Executive	Vice President	President	Partner / Owner

Primary Industry

Industry	%
Software, IT & computer services	19%
Financial services	12%
Business/professional services	9%
Manufacturing equipment & services	8%
Retail products & services	8%
Healthcare	5%
Transportation	5%
Computer hardware & networking	5%
Construction & environmental services	5%
Education & training	4%
Energy & utilities	3%
Government/public administration	3%
Food, beverage & agriculture	2%
Hospitality services	2%
Chemical	2%
Telecommunications	2%
Communications, media & publishing	1%
Defense & aerospace	1%
Pharmaceuticals	1%
Real estate	1%
Semiconductors	0.4%

What is the primary area you work in within your organization? (LOB)

Production/Operations	19%
C-Suite	19%
Finance/Accounting	13%
Administration	7%
Human resources	7%
Research and development	6%
Sales/Sales support	6%
Employee enablement/Engagement	5%
Project management	4%
Customer service/Customer support	4%
Marketing/Communications	3%
Legal	3%
Distribution	2%
Engineering	1%

What is the primary area you work in within your organization? (IT)

Information Technology	26%
C-Suite	17%
Software/Application development	10%
Production/Operations	8%
Data management/Data science	7%
Analytics	7%
Infrastructure	5%
Research and development	4%
Technical/desktop/network support	4%
Engineering	3%
Networking	3%
Design	2%
Security	2%

Q.
Base: All respondents (n=803).
Source: S&P Global Market Intelligence and Adobe custom State of Work survey.