



The revolutionary content supply chain

How generative AI supercharges creativity and productivity





Key takeaways

CMOs have sky-high hopes for generative AI. Nearly all (94%) believe that generative AI will free up marketing teams from mundane tasks so they can focus on more important, creative activities.

- **It's time for a new way to create and manage content.**

With content demands growing exponentially, organizations need to create more content at a faster pace to fuel timely, personalized experiences. 9 out of 10 executives and content professionals also say they need easier access to content assets, and 75% need to improve the delivery of consistent experiences across channels. But knowing exactly how to manifest these improvements is not always clear.
- **It's (almost) unanimous: generative AI can take content production to a whole new level.**

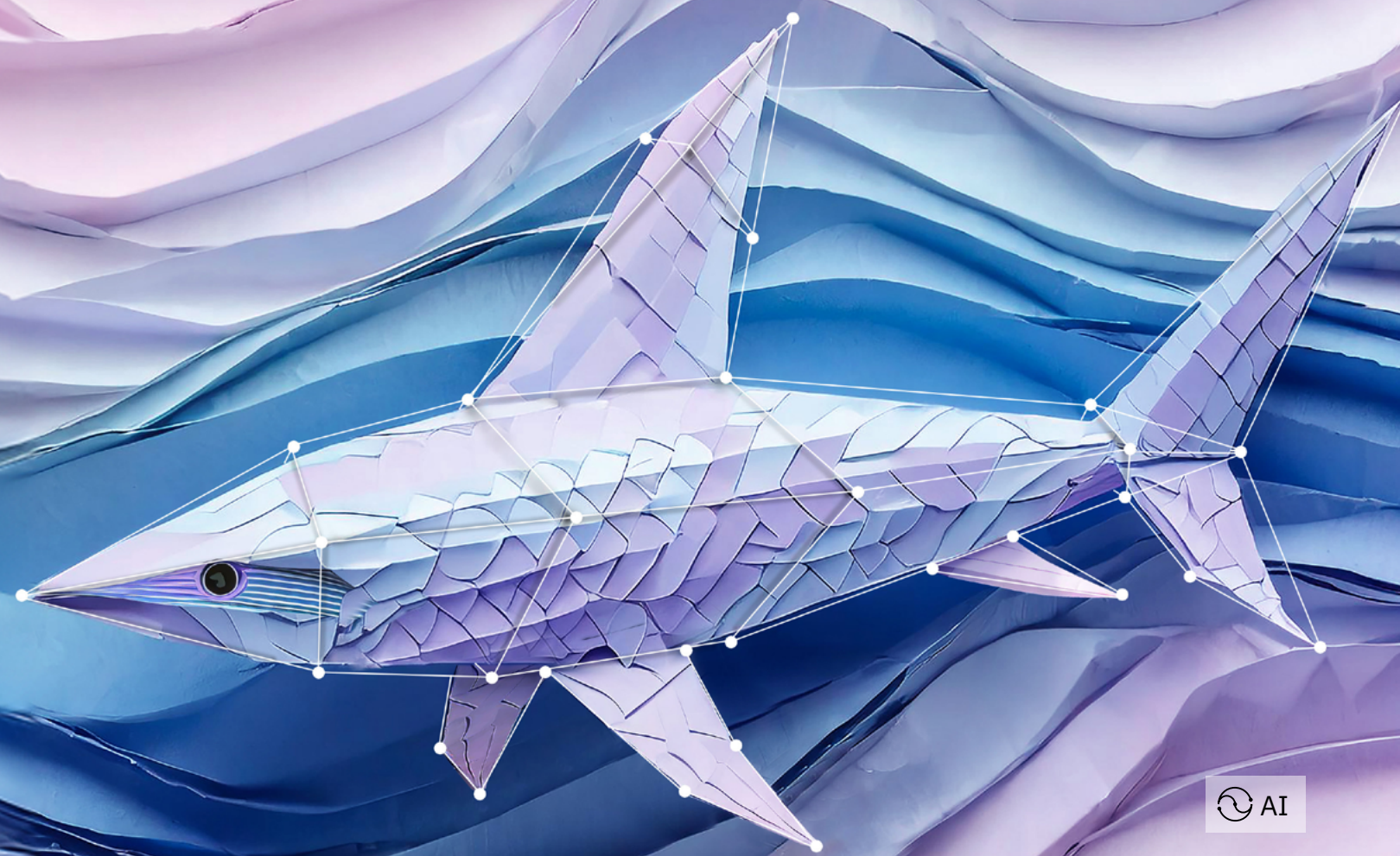
CMOs have sky-high hopes for generative AI. Nearly all (94%) believe that generative AI will free up marketing teams from mundane tasks so they can focus on more important, creative activities. And almost two-thirds (63%) strongly agree that generative AI will help to vastly scale the creation and delivery of personalized content.
- **Best practices and governance are the missing links.**

Much work remains to responsibly integrate generative AI into organizations' content supply chains. Only 5% say they have an organization-wide approach for generative AI best practices and governance. Half of organizations are still in the process of establishing these measures, while almost one in five (18%) are making no effort to adopt a formal approach at all.

The voracious appetite for content

Information—content—is increasing exponentially, around the world and across multiple channels.

88% of customer experience and marketing professionals in a recent Adobe survey said that content demands at least doubled during the last two years. About two-thirds said they expect content demands to increase between five times and 20 times over the next two years.¹



What's behind this escalation? The Adobe survey revealed three primary factors:

- Consumers are eager for personalized experiences—both physical and digital—at an ever-faster pace through “in the moment” experiences, such as social media, online gaming, and metaverse worlds.
- Organizations are keen to exploit evolving formats, such as 3D and other platforms, to better deliver those experiences.
- Organizations are targeting wider geographies, requiring more translations and localization.²

Organizations cannot and should not staunch the flood of content. But they do need to control it, which brings us to the concept of a content supply chain (CSC). At a high level, a CSC refers to the people, processes, and tools that produce, deliver, measure, and manage the content that fuels winning customer experiences.³

With the scope and scale of content production growing dramatically—especially with new opportunities presented by generative AI—organizations need to re-engineer their content creation, delivery, and tracking mechanisms, just as they have worked to transform other functions, from finance to HR.

To assess the state of content supply chain practices and unearth best practices in the age of AI, Adobe, Amazon Web Services (AWS), and the IBM Institute for Business Value (IBM IBV) teamed up to survey 1,930 executives and professionals across 9 countries and 11 industries who are leading processes and technologies used to plan, create, deliver, and measure content.

Among the findings:

- **The top reasons organizations would invest in CSC improvements** are enhancing customer experience, increasing brand differentiation, and improving productivity.
- **9 in 10** say they need easier access to content assets, **and 75% need to improve** the delivery of consistent experiences across channels.
- Yet the percentage of revenue earmarked for the creation and delivery of content is **expected to shrink by 20%** over the next two years.

It's complicated. And generative AI has shaken up these complexities, requiring organizations to rethink their CSC strategies. Although its impact is still evolving, generative AI is poised to reshape content generation and workflows. A staggering 95% of our respondents believe that generative AI will be a game changer for their businesses.

In this report, we illuminate how organizations can best use generative AI to reinvent and optimize their CSCs. In part one, we explain the advantages of a CSC, as well as some of the hurdles. In part two, we explore how generative AI can enhance outcomes, as well as how to implement governance rules and tame risks. In part three, we take a close look at operational and organizational challenges, such as siloed functions with competing priorities and the lack of a comprehensive change management approach that can stifle progress, especially during a time of pivotal transformation when speed of adoption is a competitive advantage.

A content supply chain is not an isolated entity; it can only thrive in a hospitable ecosystem. We'll conclude with an action guide—targeting key C-suite leaders—that details not only how to enhance CSCs, but how to create an organization where they can truly flourish.

A content supply chain is not an isolated entity; it can only thrive in a hospitable ecosystem.

How generative AI can fuel unbounded creativity

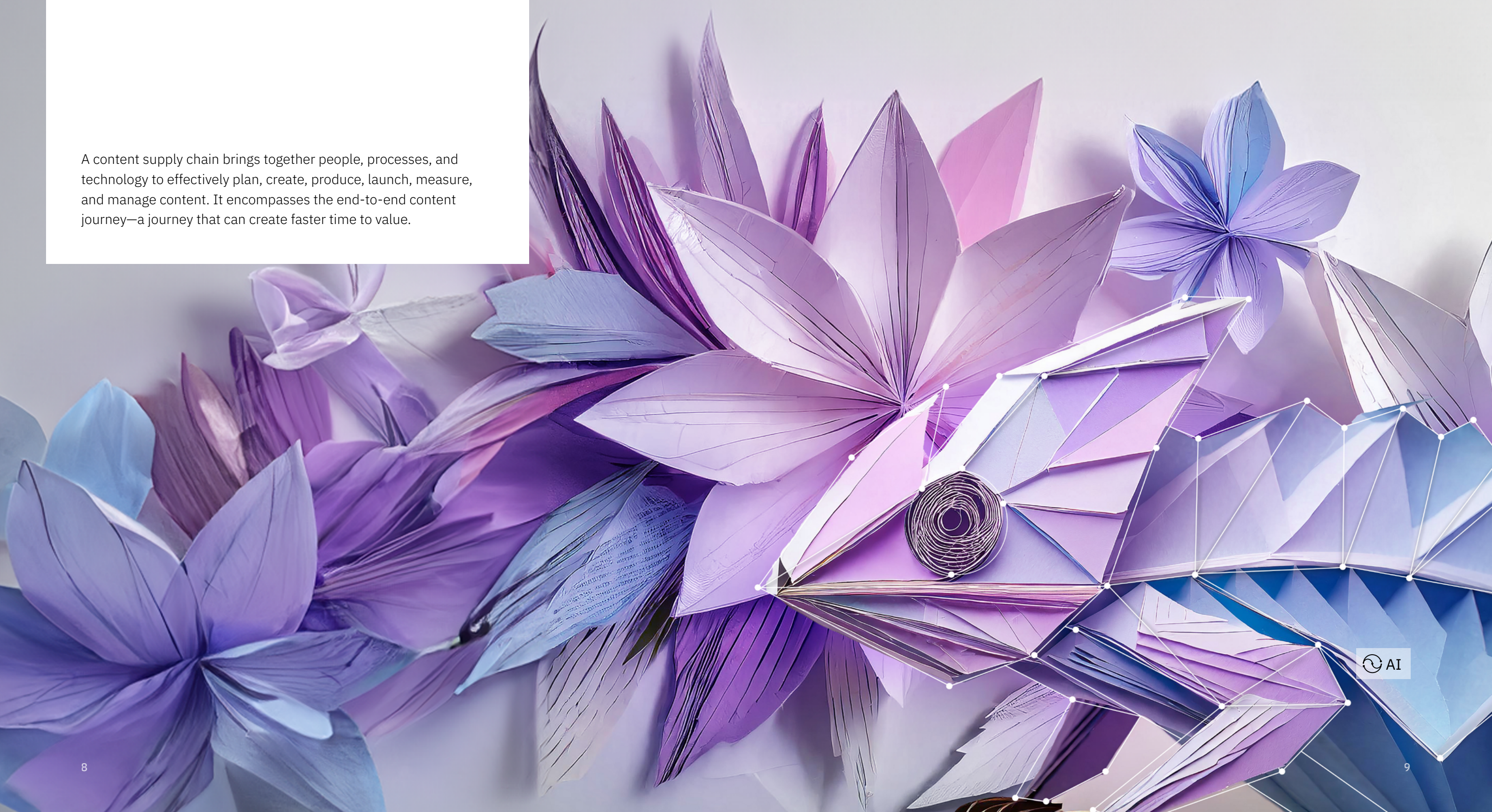
To create the images for this report, we started with a traditional conceiving phase. We landed on origami as a modality for expressing the concept of entities emerging from a single material—in this case, animals from paper. We then worked with Adobe Firefly, where we honed our prompting until we arrived at a highly scalable visual execution. Overall, a process that would have taken weeks was reduced to mere days and produced a previously unattainable volume of assets.



Part one:

Modernizing the content supply chain for optimal impact

A content supply chain brings together people, processes, and technology to effectively plan, create, produce, launch, measure, and manage content. It encompasses the end-to-end content journey—a journey that can create faster time to value.



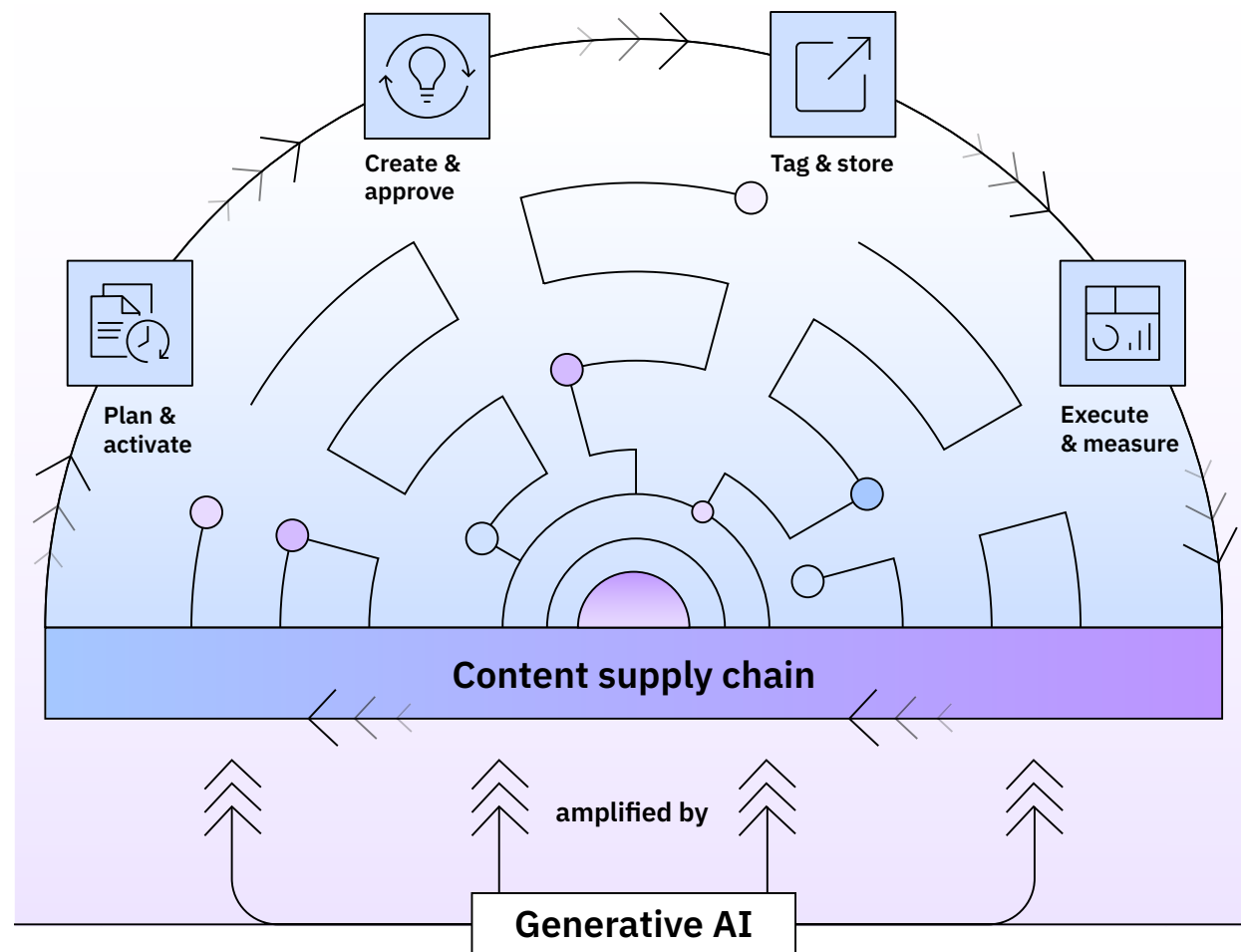
A CSC unfolds in four stages: building and activating a content strategy; creating content assets with iterative, collaborative review cycles; tagging and storing assets; and deploying assets, generally in a variety of channels, and tracking their performance (see Figure 1). And now, with the adoption of generative AI, traditional CSC processes can be even more efficient and infinitely more scalable.

When put into action, this linear path often loops back on itself, with many permutations. A single product description might be needed in multiple languages, customized for a specific audience segment, or personalized for individual customers. That might require data from different databases with varying data formats, frequent updates with new information, and optimization across multiple devices.

All too often, organizations create informal, ad hoc “Frankenstein” systems that engage a variety of platforms and tools.

FIGURE 1

What is a content supply chain?



The complexities are numerous. Multiply that by thousands, if not millions of assets generated by an enterprise and its customers—from text to images to video to 3D virtual environments—and the need for a consolidated platform to create and manage content at scale becomes essential.

All too often, organizations create informal, ad hoc “Frankenstein” systems that engage a variety of platforms and tools. For more efficient, streamlined management, organizations should evolve to a consolidated system. Scaling such a solution to meet the increasing demand for more and more content requires data integration, content generation, and intelligent automation that goes far beyond what humans alone can do. Moreover, integrating generative AI into the workflows of various CSC teams can facilitate greater speed to market and overall consistency and governance of its use.

A CSC extends past the considerable task of appeasing an increasing demand for content—it can embed itself into the very core of enterprise strategy. The benefits of a modernized CSC directly align with our respondents’ highest priorities for their organizations over the next two years: improving customer experiences, increasing organizational agility, and improving marketing and sales.

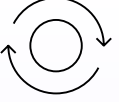
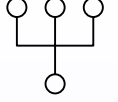

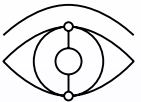
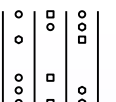
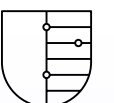

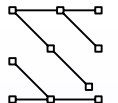
Respondents are keenly aware they need to enhance how they deliver content and analyze its performance:

- 89% say they need an easier way to access approved assets for activation across applications.
- 83% want to optimize experiences based on detailed content attribute insights.
- 79% want to experiment with content, audience, and experience variations to drive customer engagement.
- 78% want better on-time, on-budget performance by unifying assets, campaign data, and reporting.

With so much enthusiasm behind modernization, AI-fueled CSCs would seem to be an obvious priority. Yet many respondents also point to significant obstacles, with almost half citing concerns with legacy systems, data integration, oblique content processes, and organizational silos. The most vexing barrier to overcome: orchestrating change management (see Figure 2).

FIGURE 2

Change management is the most difficult barrier to improving CSCs.

 <p>49% Orchestrating change management for adoption of new tools, process, roles</p>	 <p>49% Consolidation/modernization of legacy systems</p>
 <p>49% Data integration with multiple systems of record</p>	 <p>48% Lack of clarity/visibility of current content processes, asset status, data, etc.</p>
 <p>46% Organizational silos with a complex set of stakeholders and competing agendas</p>	 <p>45% Privacy and security considerations</p>
 <p>40% Lack of knowledge about current content platforms capabilities</p>	 <p>36% Lack of clarity about how to start/where to invest</p>

Q. Which barriers does your organization need to overcome to improve its content supply chain?

Roughly a third (37%) of organizations considering CSC modernization are eager to start by focusing on the acceleration of content creation and scaling production. Nearly as many (32%) want to start by building connected intelligent content workflows. Disturbingly, only 21% are creating a top-down strategy to transform how content is created and delivered.



Part two: Unleashing generative AI

Generative AI can help content creators—across creative teams (internal or external), marketing, customer support, product development, operations, or other functions—research, ideate, generate, personalize, and manage content.⁴



By the end of 2024, 77% of respondents expect to use generative AI embedded in platforms, such as Adobe Firefly.

In fact, practically all our respondents (95%) agree that generative AI will be a game changer. An overwhelming majority (89%) believe that generative AI will free up creative and marketing teams from mundane tasks so they can focus on more important, value-add activities. And nearly two-thirds (63%) strongly agree that generative AI will help to vastly scale the creation and delivery of personalized content.

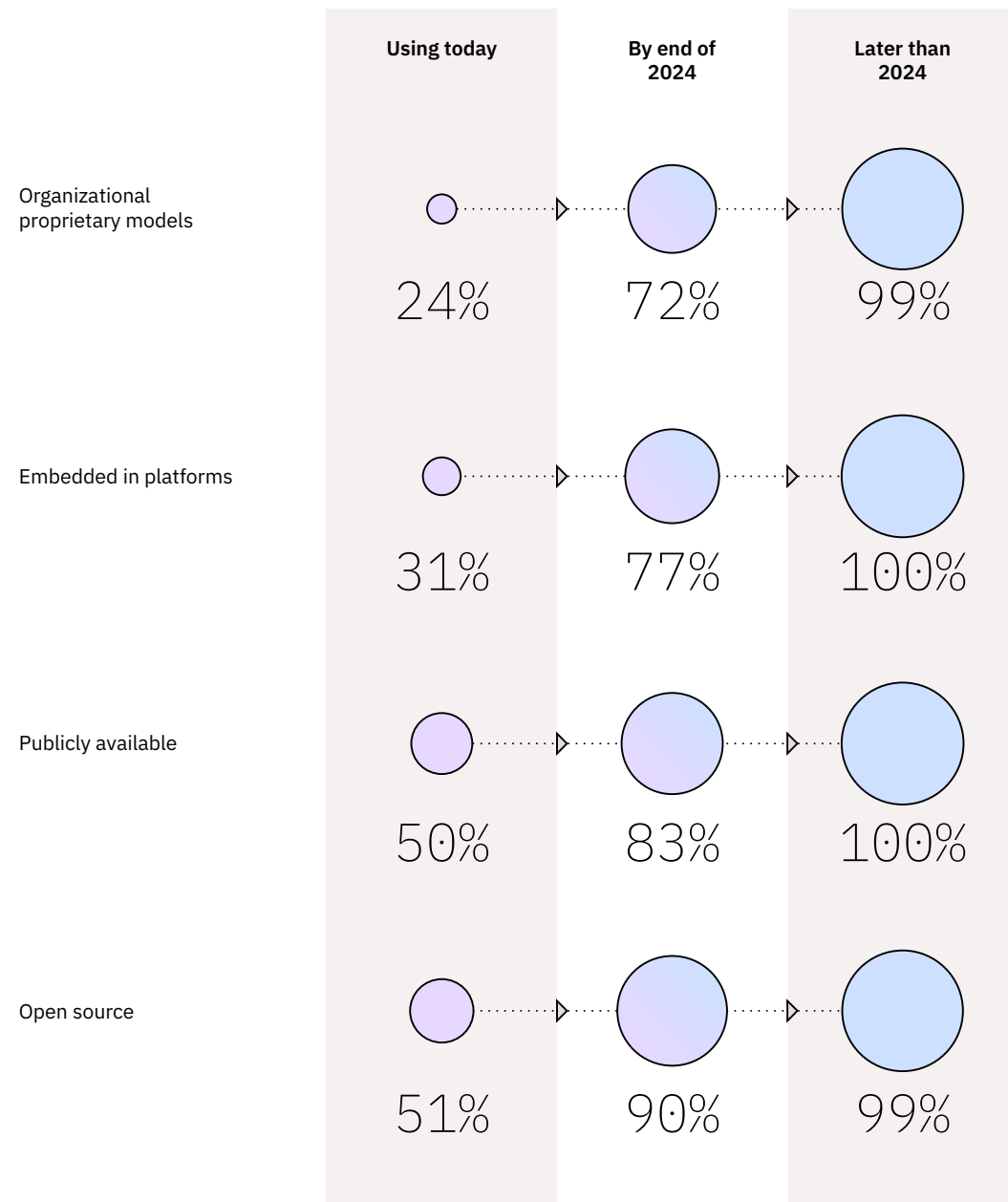
For CSCs and generative AI, these are early days, and organizations are eager to jump in. While more than 80% of our respondents report already engaging with generative AI, a scant 2% are actually optimizing the technology. Almost three in four (74%)—are still in pilot mode, and only about a quarter have gone beyond pilots to start implementation.

Still, the pace of adoption is stunning. By the end of 2024, 77% of respondents expect to use generative AI embedded in platforms, such as Adobe Firefly. Publicly available models such as ChatGPT; Amazon Bedrock—a fully managed service to build and scale generative AI applications with foundation models; or open-source models such as Stable Diffusion could have even higher adoption rates.

Importantly, though, it is the proprietary models and/or customized models with unique data and refined prompts that can deliver the scaled hyper-personalization and competitive advantage that enables generative AI to supercharge a CSC. Many are taking a page from the hybrid cloud playbook and adopting a hybrid approach to AI, blending their proprietary models with best-in-class SaaS platforms infused with AI and public and open-source models. For example, marketing copy and imagery created with generative AI can be more effective when informed by an organization’s unique brand guidelines, customer profiles, and insights from prior campaigns (see Figure 3).

FIGURE 3

Many organizations start with public and open-source generative AI models, but they need propriety models to scale personalization.

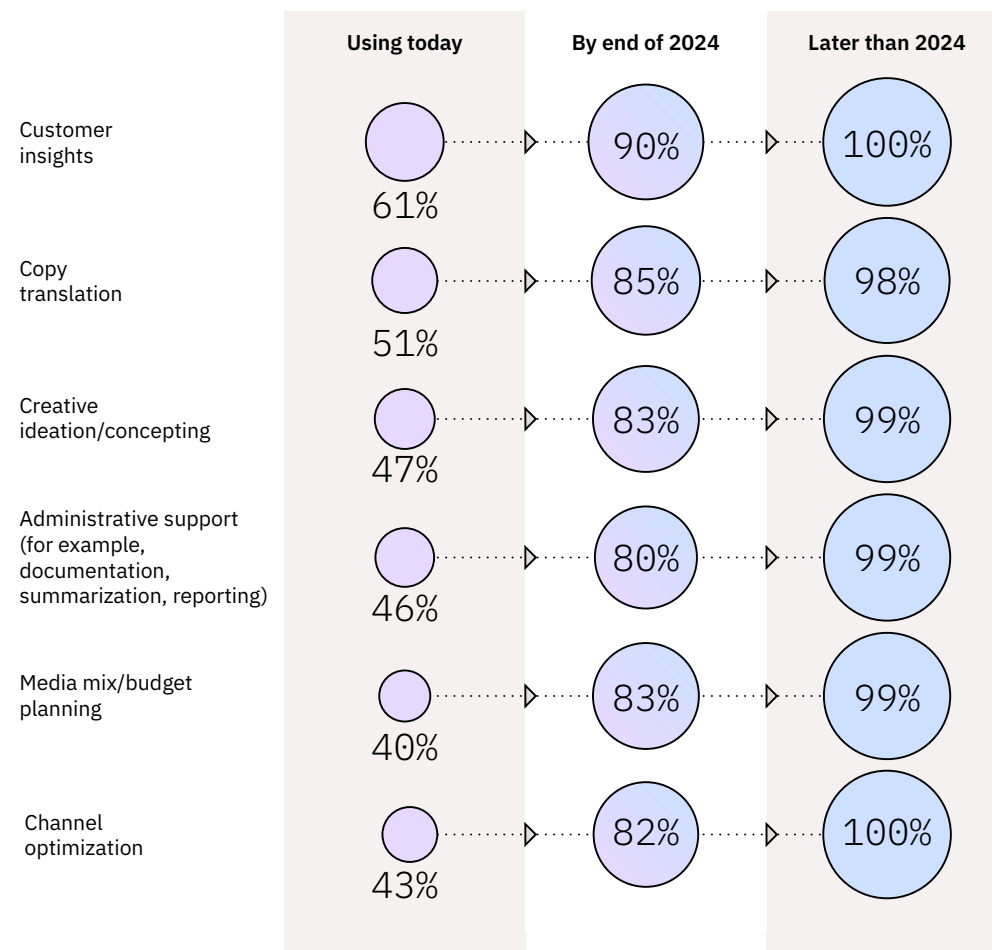


Q. Which types of generative AI solutions is your organization using (or planning to use) to enhance your content supply chain?

One reason adoption has been so aggressive is the wide swath of activities across the full CSC journey to which generative AI can be applied. Not only are content designers using it for concepting and creating/editing visual content—some of the more familiar use cases—but organizations are also using it to analyze and synthesize customer insights, translate copy, and create administrative reports. While many of these applications may still be in pilot mode today, the overwhelming majority of respondents predict that by the end of 2024, generative AI will be firmly embedded in their CSC workflows (see Figure 4).

FIGURE 4

After 2024, organizations expect generative AI to be heavily embedded across functionalities.



Q. For which tasks is your organization already using generative AI or planning to use it in the future?

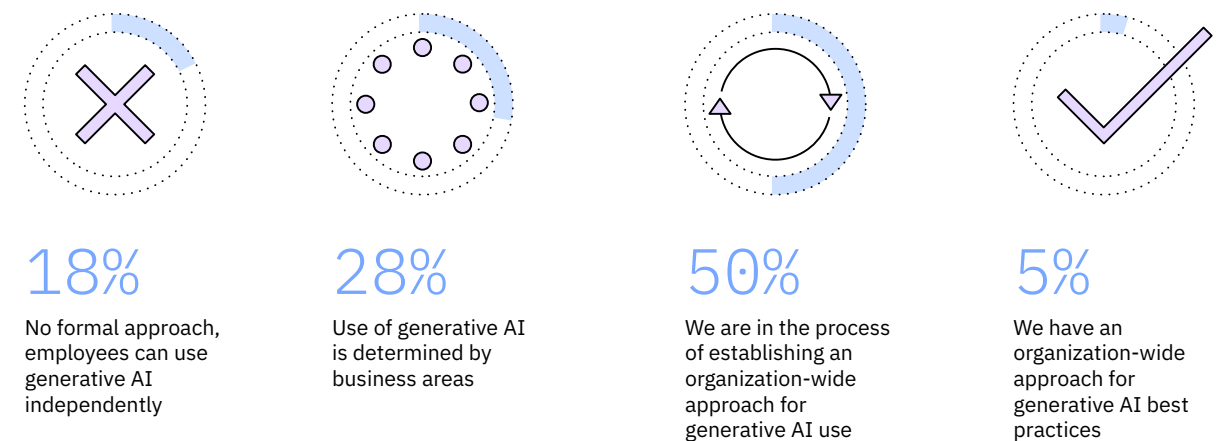
On your mark, get set—get governance

Generative AI is dynamic, exciting, and transformative—and it's tempting to go full throttle, pedal to the metal. But to achieve the most benefits from generative AI, organizations need to simultaneously drive in the fast lane without crashing into guardrails.

Much work remains. Only 5% of respondents say they have an organization-wide approach for generative AI best practices and governance. Half of organizations are still in the process of establishing these measures, while almost one in five (18%) are making no effort to adopt a formal approach at all (see Figure 5).

FIGURE 5

An organization-wide approach to generative AI management is rare.



Q. Which of the above statements best describe how your organization is currently managing the use of generative AI?

Perspective

Generative AI: Job enhancer, not job eliminator

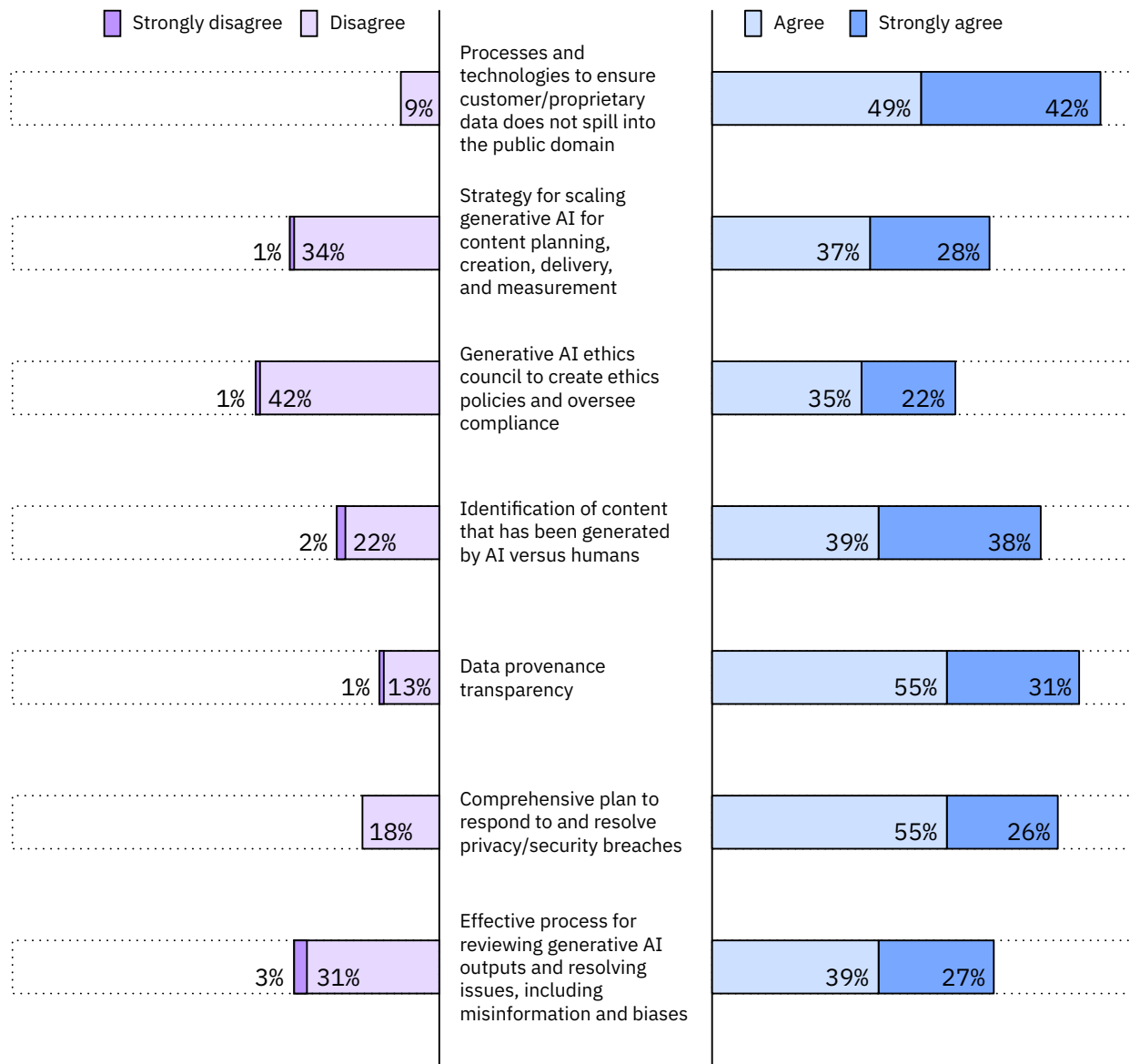
More than 8 out of 10 respondents (81%) believe that the adoption of generative AI is intended to assist their content creators, not replace them. And what do respondents anticipate about their own positions? 70% believe that generative AI will not eliminate their job but will change how they work for the better—either somewhat or significantly. Only 1% feel their job is at risk, and they could be laid off.

Taming generative AI risks

Any organization interested in generative AI should take steps to mitigate potential risks—to move quickly but resist the pressure to skip critical measures. In fact, 43% of survey respondents confess their organizations have not set up a generative AI ethics council (see Figure 6).

FIGURE 6

Opportunities for improvement: Taking measures to help reduce potential risks.



Q. To what extent do you agree that your organization is taking steps to mitigate generative AI risks?

Beyond the ethics risks, there are also cost risks: organizations tend to underestimate the cost of the extensive storage that generative AI requires. Organizations need to weigh the impact that a CSC expansion fueled by generative AI will have on their back end. Many local and regional content teams are relying on on-premises servers and private clouds that cannot effectively support content production, discovery, and delivery at scale. IT teams are often unaware of just how much content is scattered across multiple environments, resulting in little getting incorporated into digital experiences that should be more targeted.

If organizations are prioritizing producing more content, then more high-performance computing is required to make that content available to internal stakeholders and external audiences in real time. This level of performance could indeed increase on-premises computing costs.

But costs must be assessed in the context of benefits. For example, cloud computing plays a vital role in optimizing content supply chains by providing scalable, flexible storage and processing capabilities with enhanced security. With cloud computing, content creators and distributors can efficiently manage and distribute their digital assets and improve collaboration. Additionally, cloud-based solutions enable real-time updates and version control, facilitating content that is up-to-date and easily accessible to stakeholders.



Part three:

Priming your organization for a modernized, end-to-end content supply chain

The very definition of an enterprise CSC—an end-to-end, holistic content solution—is both one of its biggest advantages and one of its biggest challenges.

For example, when asked about the primary owner of their CSCs, respondent answers varied widely—not unexpected, given CSC’s pervasive impact across the organization. The CMO (30%) was most common, with Chief Experience Officer (24%) a close second. The rest comprise a mix of executives and managers across operations, customer support, finance, sales, corporate communications, and more.



It's no wonder that 46% of respondents are worried about organizational silos, complete with complex stakeholders and competing agendas. Different processes and standards for content; different data formats, systems, and repositories; and lack of coordination among teams can, on the face of it, be overwhelming.

This may partially explain why executives expect investment increases in cross-enterprise CSC enhancements over the next few years to be less robust. Instead, many are opting to apply specific, targeted solutions for incremental enhancements in certain areas. The promise of generative AI has made this approach even more attractive—especially for those seeking brisk gains in speed and scalability.

But this “poke-at-a-problem” technique only perpetuates misalignment and a lack of integration, jeopardizing the very value proposition of an effective CSC. And importantly, tactical, targeted enhancements exacerbate a key obstacle that can derail even modest program reforms—the lack of an enterprise-wide change management strategy for new processes and tools. Many organizations neglect the very strategy that could facilitate comprehensive adoption of a CSC.

As noted earlier, respondents cite a lack of change management as the most difficult CSC barrier to navigate. Organizations under pressure to quickly demonstrate positive outcomes often resort to

shortchanging this long-game effort. As a result, they can soon find that adoption of new processes, technologies, or skills is painfully slow or inconsistent, jeopardizing the success and ROI of content initiatives. In worst-case scenarios, this can lead to a spiraling morale problem internally and—externally—may negatively impact the customer experience.

A CSC is much broader than just technology, and simply training employees to use a new interface is only one piece of the transformation puzzle. Effective change management starts much earlier, preferably in the preliminary requirements-gathering stage. At that initial phase, current pain points can be directly addressed, strategically and tactically.

Employees who have a voice and feel heard are far more apt to become early adopters and help evangelize the transformation within their teams and across the organization. Considering the disruptive nature of generative AI, securing support that fosters trust is an essential component of this endeavor.

Breaking down silos is never easy. But a CSC transformation can be the catalyst for needed organizational culture shifts, with its impressive potential benefits stretching far beyond the improvement of content production.

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Case study

IBM Marketing—Transforming marketing by streamlining operations and personalizing experiences⁵

IBM Marketing wanted to improve its cross-channel marketing experiences. The numbers were daunting: across 2,000 marketers, 100 products, 175 geographies, 70 platforms, and 10 million data sets, the organization needed to consolidate an approach and deliver more personalized, user-friendly experiences.

Adobe was the ideal partner.

Phase one, conducted in 2021, focused on streamlining complex data structures and fixing disjointed martech stacks. Partnering with Adobe simplified the operating model and enabled implementation of industry-leading platforms. Results included \$300 million in cost savings, a 50% reduction in labor costs, and a 75% faster time to market.

The following year, phase two integrated people, processes, and technology with Adobe Workfront, a work management application that helps knowledge workers manage the entire lifecycle of work in one place. The integration led to a 700% increase in product-led growth, translation coverage from 20% to 100%, and significant reductions in assets and web pages.

In 2023, phase three explored AI and automation, launching a pilot of content creation with Adobe Firefly, a tool powered by AWS that offers new ways to ideate, create, and communicate using generative AI. This resulted in 26 times higher engagement for Firefly-generated assets, an 80% reduction in content creation spend, and a 77% decrease in email creation time. Other AI and automation use cases included automated channel delivery, robotic machine translation, and performance-based recommendations.

By focusing on delivering personalized experiences, Adobe has helped jump-start IBM's ongoing marketing transformation.

Case study

T-Mobile turns its marketing workflows into a competitive advantage⁶

With 109 million customers, T-Mobile is the second largest mobile carrier in the US. The company—which rebranded itself as the “Uncarrier”—has distinguished itself in the competitive American mobile market through innovative customer-first initiatives, such as eliminating annual contracts and offering unique perks such as faster data roaming and free in-flight wifi. A key part of its strategy: in 2018, the company implemented Adobe Workfront, a platform to centralize marketing workflows and promote agile, collaborative work.

This technology has grown from being used by 60 employees to over 5,000, aiding in managing the complexity of T-Mobile’s brand portfolio and optimizing marketing operations across the brands. The platform has improved campaign delivery, removed siloes between teams, and automated tasks.

Following its merger with Sprint, T-Mobile was able to increase marketing output by 47% without additional head count. Indeed, its teams were empowered to work in a more streamlined, collaborative way. The company also saved upward of \$2 million by consolidating workflow management tools on Workfront. Looking ahead, T-Mobile plans to integrate the entire marketing workflow onto Workfront, including planning, content creation, and curation in Adobe Experience Manager.

Additional specific results include:

- **Saved more than \$2 million** by consolidating and automating workflows within digital creative delivery for web
- **Cut 20 hours** from manual reporting tasks each week for the senior leadership team in one business unit
- **Enhanced data-driven decision-making** across business strategy functions.

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Action guide

Because a CSC transformation can touch numerous functions, competing agendas and expectations can quickly derail progress if key leaders aren't aligned on a CSC vision, strategy, and goals.

For example, our data indicates that CMOs are more interested in CSC improvements delivering a revenue bump than CTOs. And CTOs are more focused on better productivity and efficiency than CMOs.⁷ Below, we outline practical actions for CMOs, CTOs, and CFOs that can help them champion CSC enhancements with a holistic approach.

Chief Marketing Officer

CMOs set the North Star for a CSC transformation. As stewards for the enterprise customer experience, they are responsible for helping their CSCs establish a foundation that will engage customers with timely, personalized content. Marketing should be positioned as the model for generative AI-driven workforce transformation.⁸ As a leader in this realm, CMOs need to champion changes that will incentivize teams, such as relief from mundane tasks so employees can focus on more creative, value-add activities.



Start with the end in mind.

Using a method such as Design Thinking,⁹ craft a “to-be” vision for your CSC with humans at the center: customers, colleagues, and agencies. Address the dual pressure of improving effectiveness and enhancing efficiency, which can ultimately lead to increased revenue. Level-set by comparing your “to-be” with your “as-is” processes, people, and platforms to create a transformational blueprint and roadmap.

Deconstruct the roadmap into easily navigated segments.

You can reengineer your CSC to expand its scope and scale without succumbing to analysis paralysis. Prioritize improvements by weighing the biggest benefits to customers and the business. Rapidly deliver a minimum “wow-able” product that spotlights the potential value of continued improvements to win stakeholder buy-in.

This is a journey, not a destination. Embrace it.

Regularly engage internal stakeholders across your organization—from top executives to your content creation teams—to assess your CSC’s current state, fix pain points, and entertain what’s next. Do the same with your customers. Measure what matters to the business and share results to maintain a drumbeat of enthusiastic support.

Chief Technology Officer

The CTO is the CSC architect. In this critical role, the CTO guides the CMO and the CSC team on the technical feasibility of the transformation. The CTO helps optimize the value of investments made in platforms, data, and cloud technologies.



Make the CMO your best friend.

Work with the CMO and other content leaders to capture a full understanding of requirements, including anticipated business results and KPIs, operational challenges, needed support for in-house creatives and/or agencies, and customer demands. Be sure to audit content assets and data that may reside in noncentralized, local repositories—or functional silos.

Consider the art of the possible.

Scope the current status of your platform applications, systems of record, and cloud infrastructure to assess the viability of desired near-term improvements and long-term goals. Then define your target state by stitching together capabilities that deliver the business's functional and nonfunctional requirements, such as performance, scalability, and security.

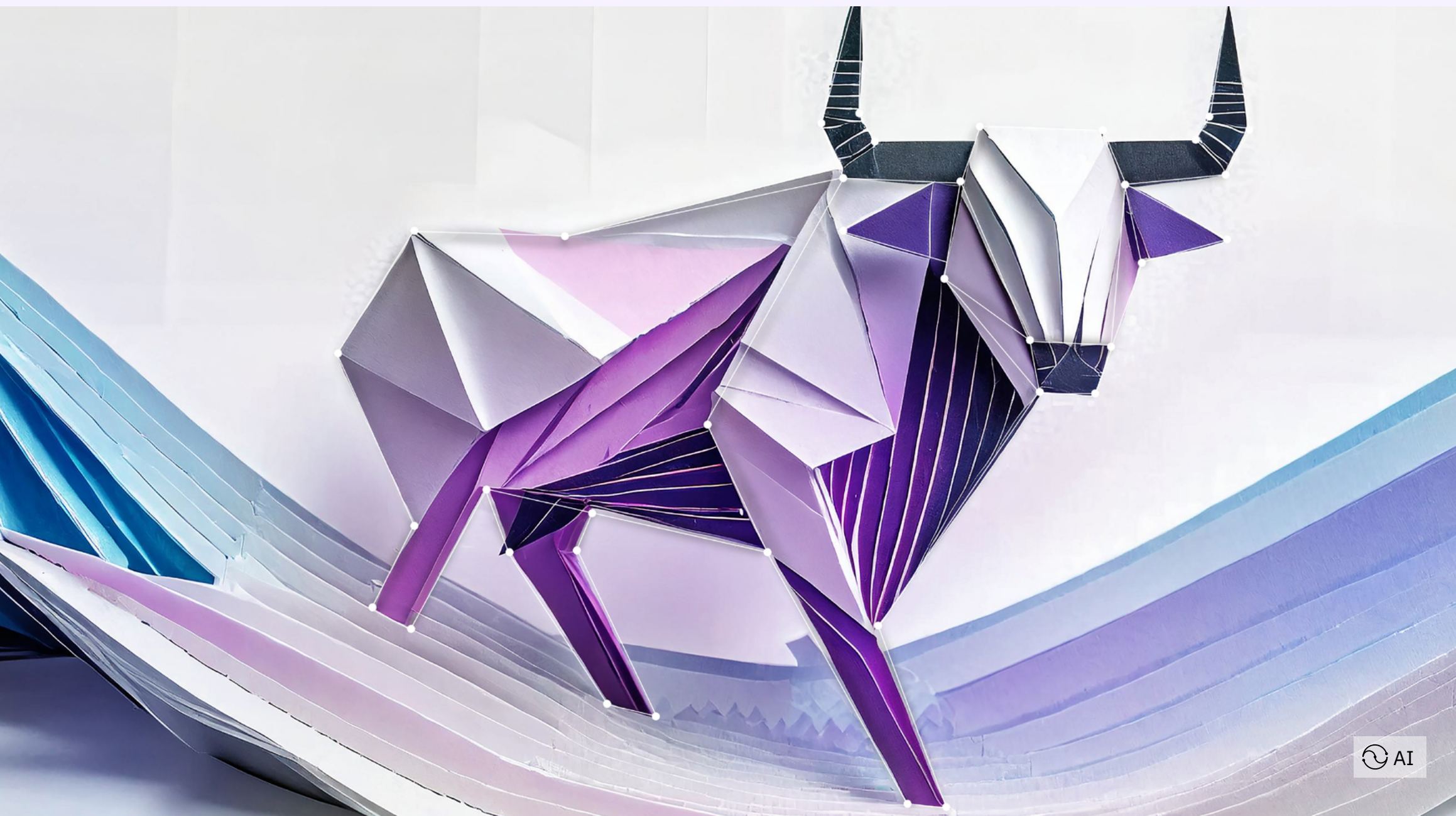
Get the CIO in the game.

Pull in the CIO to assess prebuilt asset libraries. The CIO should also evaluate hybrid solutions aligned with proprietary AI foundation models and investments in the right integration technologies and storage solutions. How can they accelerate time to value of new capabilities and reduce costs by stimulating reuse?

Chief Financial Officer

The CFO, with support from the procurement leader, helps ensure the CSC transformation delivers the optimal return on investment. It can be difficult to track spending for content-related tasks, especially in organizations with decentralized content production where costs are accrued from multiple groups, numerous external agencies, or other third parties.

As a result, organizations tend to downplay cost reduction as a driver for change. However, once they commit to exploring a CSC transformation and audits are complete, the cost of an inefficient system often comes as an unpleasant surprise. Freeing this up can fuel growth initiatives in marketing and beyond.



Reinvest in what's working.

Inspire trust in enterprise leaders by meticulously tracking success metrics. Empower transparency about current costs and potential for improvements, for example, by publicly committing to a level of reinvestment if business metrics are achieved. Follow through on those commitments. Don't set a tone that leaders must always do more and more—with less and less.

Create a value scorecard.

Work with teams across the business to build a value realization framework. Lead the way with timely, accessible reporting around revenue and profit—while also honoring more quantitative measures such as customer and employee feedback.

Let successes go viral.

Publish financial achievements against the value realization framework and celebrate success. This further inspires a culture of transparency, autonomy, and accountability.

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Study approach and methodology

In collaboration with IBM's content supply chain partners, Adobe and AWS, IBM IBV and our research partner, Oxford Economics, conducted a double-blind quantitative survey with 1,930 C-suite officers, business executives, and content professionals who drive the strategy, operations, and technologies used to create and manage content for their organizations.

This survey covers nine countries (Brazil, Canada, China, France, Germany, India, Japan, the UK, and the US) and 11 industries (banking, consumer products, energy and utilities, financial services, healthcare, industrial manufacturing, insurance, IT, professional services, retail, and telecommunications). It is one of the largest of its kind addressing how organizations (business-to-business and business-to-consumer) are responding to the rising demand to scale more content with better personalization, all while improving productivity. Respondents are also very knowledgeable about their organizations' adoption of generative AI and plans for using it to enhance their current content supply chains.

The data results are brand-agnostic, reflecting numerous technologies associated with CSCs, including Adobe™ Creative Cloud, Experience Cloud, and Workfront; AWS Cloud; Microsoft™ Cloud; Salesforce Marketing Cloud; SAP Marketing Cloud; Google Cloud Platform; Google Analytics, and others.

Contributors

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