



**Bureau of
Digital**

Insights, Events & Resources
for Digital Leaders

The 2023 Digital Agency Tools Survey Results



**Promethean
Research**



Introduction



The Bureau of Digital partnered with our friends at [Promethean Research](#) to manage and analyze the results of our latest digital services tools survey. We last ran this survey in 2021, so we were due for an update. This time, we asked members of the Bureau of Digital and Promethean clients 18 questions covering what tools and applications they use for various tasks.

The big story with our latest survey is how quickly shops have added AI tools to their workflows. GPT-3 was released in mid-2020, and within a year and a half, over 50% of shops have implemented some AI assistance. This rapid adoption has accelerated questions that used to seem more appropriate for the 2050's+.

What happens when content creation is free?

What's the "good-enough" point for thought leadership?

Where's the value lie in software and web development, and how will that evolve?

What's left for design in the business space if AI can churn through 100k permutations and optimize them for conversion rates in .002 seconds? If nothing else, AI seems like it'll force shops to think deeper about the value they create for clients. It'll also force owners to rethink which spaces they want to operate in.

Now let's take a look at the winners.

Key Takeaways

AI is a thing.

Over half the shops reported using some kind of AI tool.

Digital shops spend an average of
3.7% of revenue
on tools.

Only 40% of shops

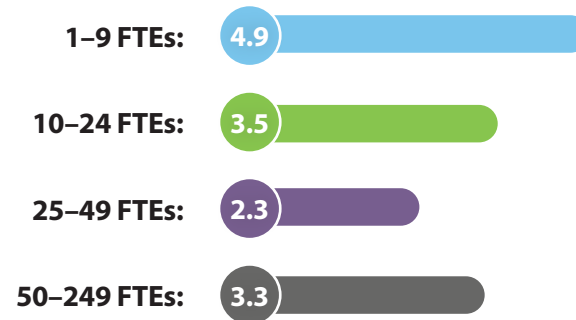
use culture or employee feedback tools, and there was surprisingly little growth in this space since our survey back in 2021.

Capacity planning tools have become significantly more popular, with
89% of digital shops
now using them.

Tool Spend

It seems like it's just a bit too easy to spend a ton on apps. We wanted to get to the bottom of just how much a shop typically spends on tools. To make it easier to compare, we asked how much shops spent on their tools last year as a percentage of their overall revenue (minus any passthrough spend). This should give everyone a good idea of just how in-line their tool spend is.

The overall average percent of revenue digital shops spent on tools in 2022 was 3.7%



**Note that this was an optional question with 53 responses.*

AI Tools

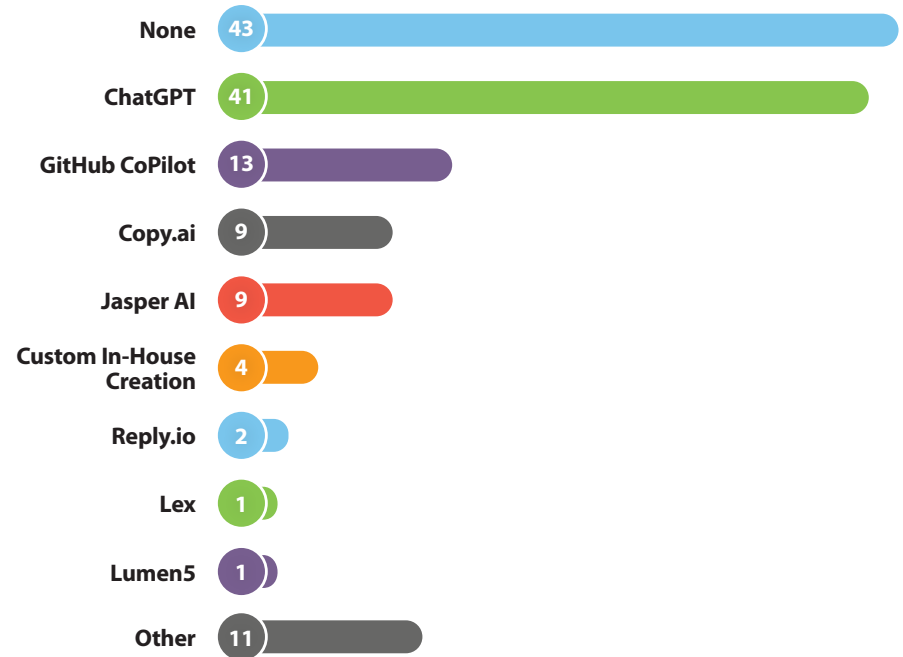
ChatGPT was the most commonly used tool, but most responses had it paired with another tool like Jasper AI, Copy.ai, or GitHub CoPilot. Only 4% of shops are using custom in-house AI tools.

The rapid adoption of these tools is surfacing questions about how to add value to clients. The answer? Differentiation and commoditization. However, differentiation will be hard if AI adoption continues. And it looks like AI will lead to a faster commoditization of certain services.

So, how do you add value?

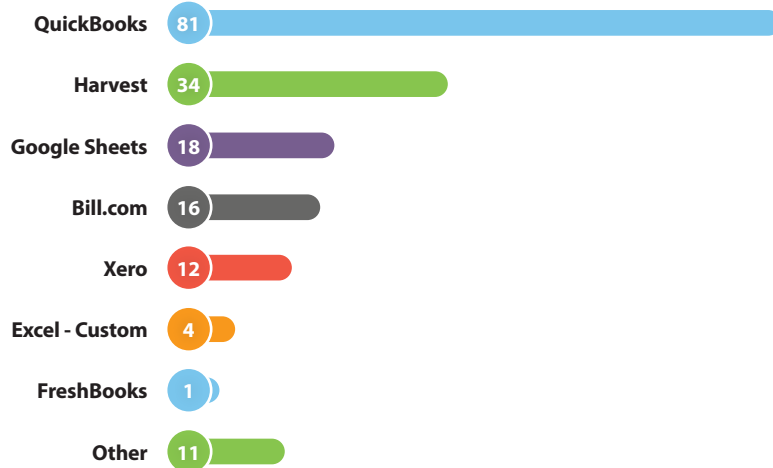
Do you provide execution, strategy, or both? If you're overly weighted toward execution, it looks like much of this work may be commoditized faster than we expected a few years ago. For now, leveraging AI tools as efficiency boosters instead of differentiators makes sense.

WHAT AI TOOLS DO YOU USE?



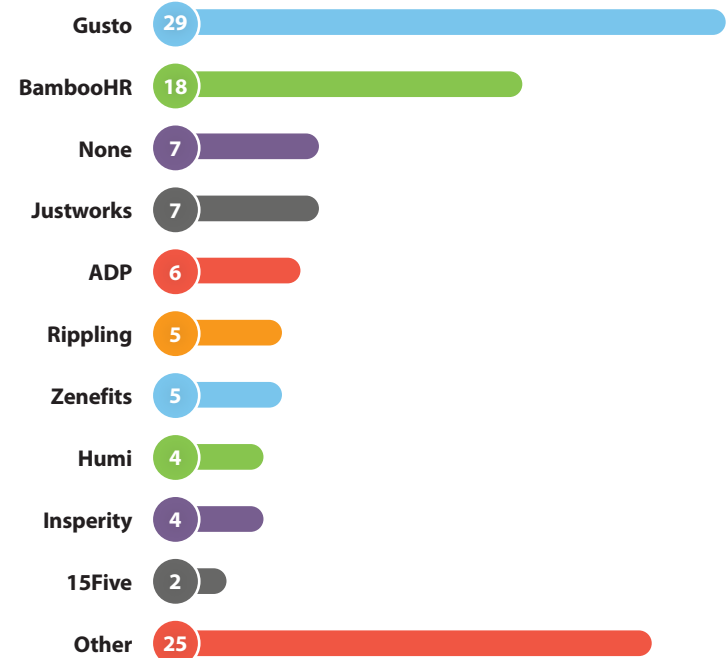
Accounting & Invoicing Tools

Just like our last survey, QuickBooks was once again the clear winner, with 81% of shops using it. Half of those using QuickBooks also use another accounting/invoicing tool. This second tool was most commonly Harvest or Google Sheets.



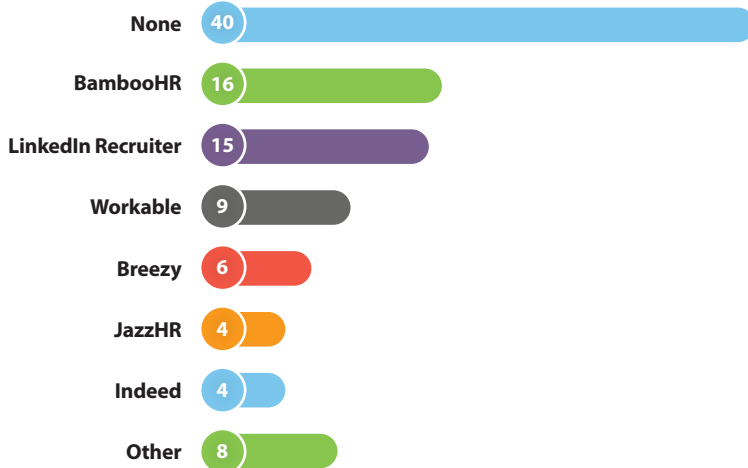
Human Resources / Payroll Tools

Gusto came out on top this year, with 29% of shops using it. BambooHR went from 34% in our 2021 survey to 18% in 2022. At the same time, those not using any HR software went from 20% to 7%. So, more shops are using HR and payroll software, but fewer are choosing BambooHR.



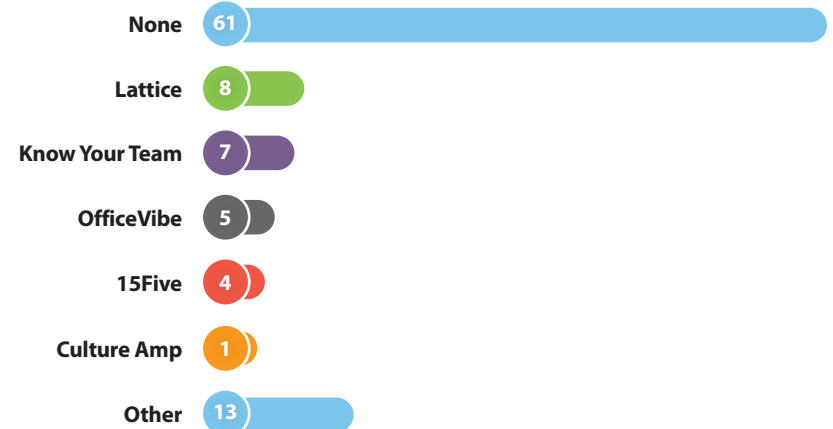
Hiring / Applicant Tracking Tools

Hiring and applicant tracking tools haven't gained much, if any, popularity since our 2021 survey. They've stayed essentially flat from 59% of shops using them in 2021 to 60% in this year's survey. The two most popular are BambooHR and LinkedIn Recruiter, at 16% and 15%, respectively.



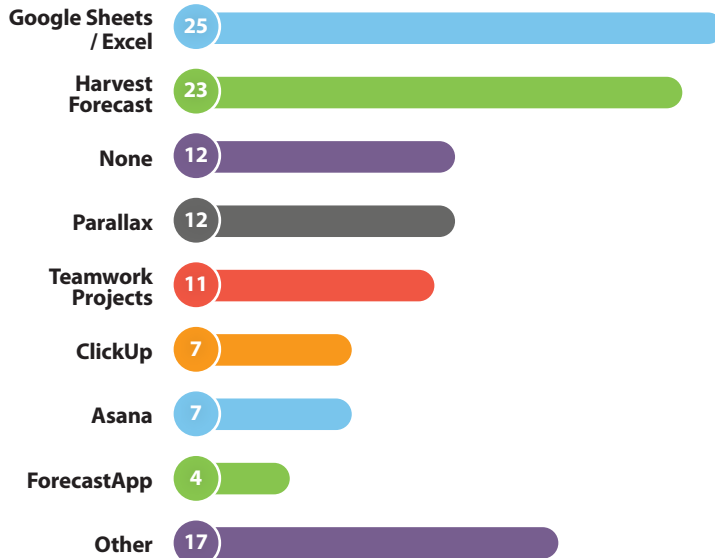
Culture / Feedback Tools

Only 39% of shops use any culture or feedback software. Of those that do, Lattice is the most popular but Know Your Team is a close second. While there was small growth from our last survey, from 34% of shops in 2021 to 39% today, we expected to see more adoption due to the emphasis on culture and employee engagement during the last few years.



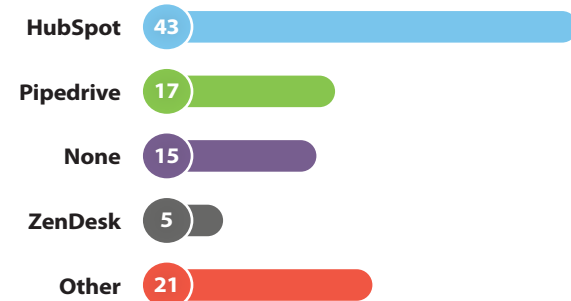
Capacity Planning / Staffing Tools

With the industry's march toward sophistication (and the focus on utilization and margins), capacity planning tools have grown in popularity. In our 2021 survey, 64% of shops were using them. Now, 88% of digital firms employ some type of capacity planning or staffing tools. Custom solutions built in Google Sheets or Excel are the most popular. Even when shops use a tool like Harvest Forecast, a good portion tend to augment its abilities with their own spreadsheets.



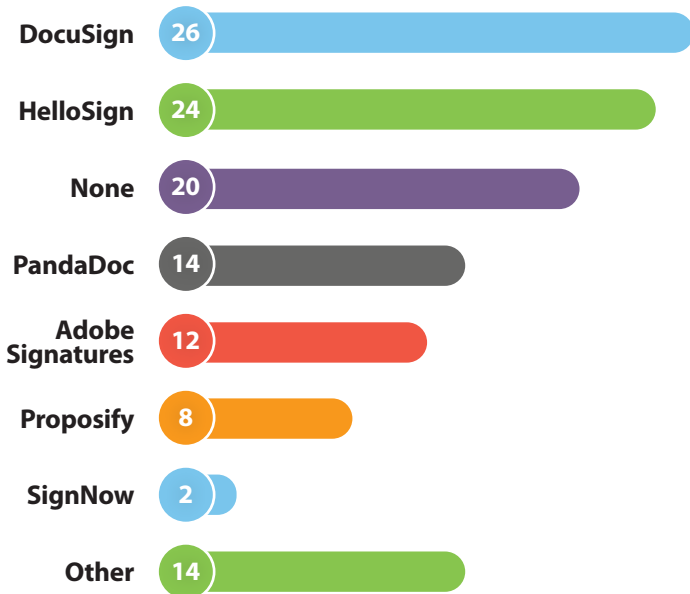
Customer Relationship Management Software

HubSpot is still the most popular CRM for digital shops in our survey at 43%. Pipedrive lost some ground since 2021, dropping from 22% to 17%. While there are fewer of them, we're surprised by the number of shops not using a CRM. They tend to be smaller firms in the one to nine FTE range, but there were still four in the 10-24 FTE range and two in the 25-49 FTE range.



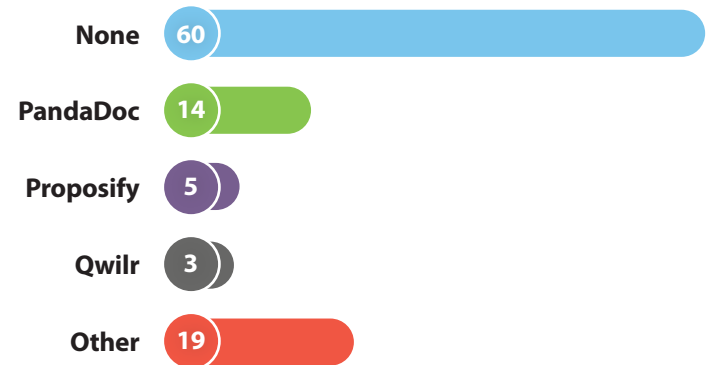
eSign Software

This is a pretty fragmented space, but the two leading players are DocuSign and HelloSign (now DropBox sign) at 26% and 24%, respectively. PandaDoc and Adobe Signatures live in the middle of the pack with 14% and 12%, respectively. The percentage of shops not using any eSign tools has actually grown from 15% in 2021 to 20% today.



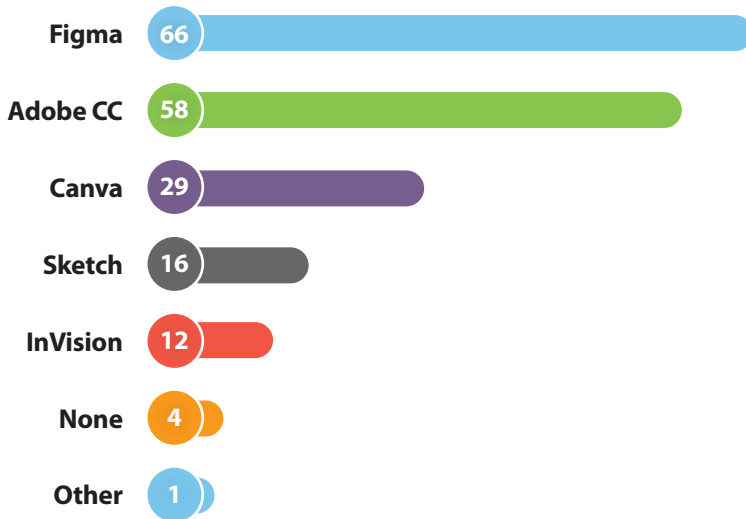
Proposal Software

For all the talk about proposal delivery and presentation within the Bureau Slack, only 40% of shops surveyed use any kind of proposal software.



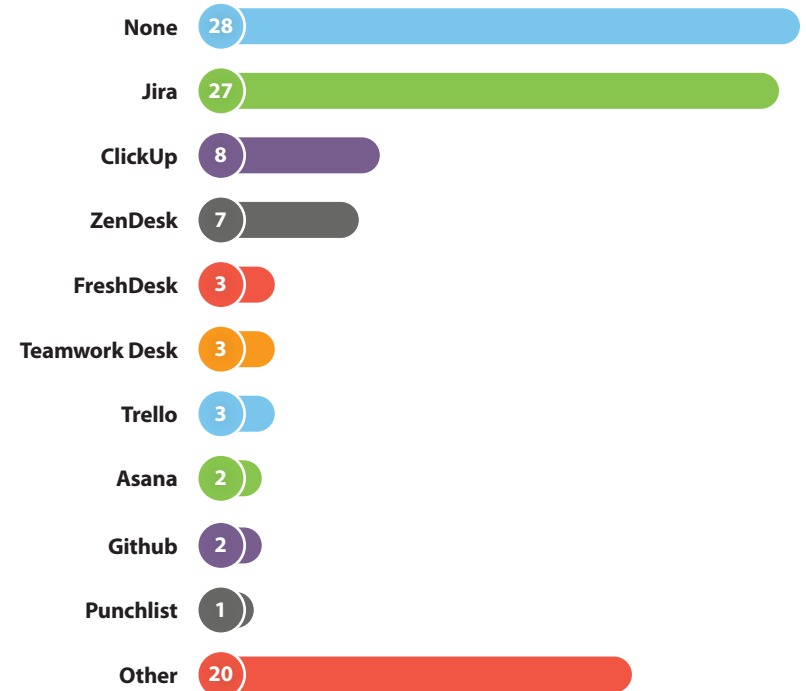
Design Tools

This is a toolset where most shops use multiple tools and almost everyone is using one of the big five. Figma is once again the most popular tool, and it's even gained ground from 2021, up from 59% then to 66% today. This growth appears to have been at the expense of Sketch and InVision. Sketch fell from 35% in 2021 to 16% today, while InVision fell from 32% in 2021 to just 12% today.



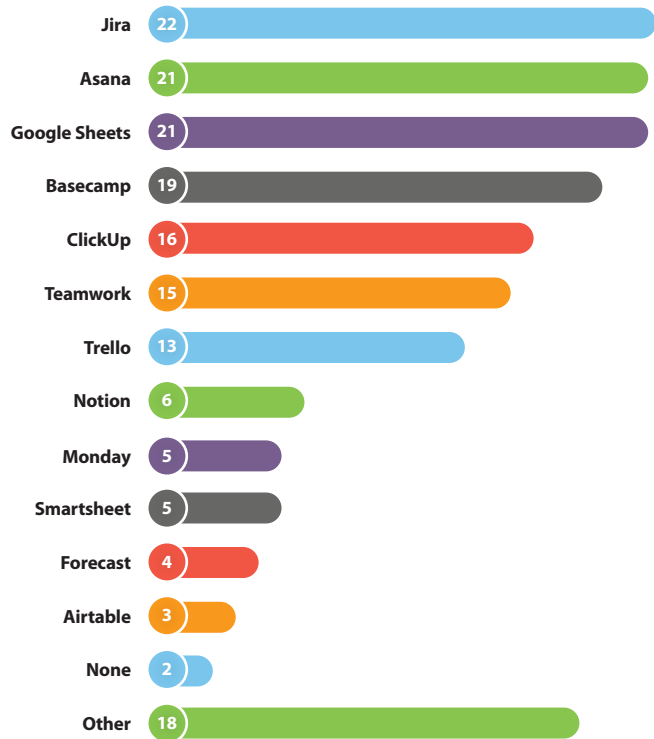
Issue Tracking Software

While there's a wide variety of issue tracking tools, 28% of shops don't use anything at all. 27% of shops use Jira. The remainder tend to use one of a number of other options with little tool overlap.



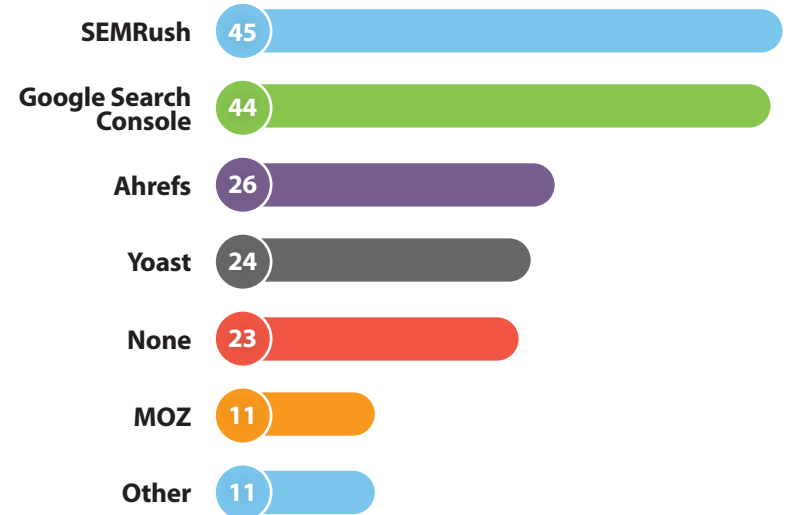
Project Management Tools

As we saw with the design tools, most shops will use more than one tool for project management. Asana, Google Sheets, Jira, and Basecamp are all fighting at the top, but ClickUp, Teamwork, and Trello are close behind.



Search Engine Optimization Software

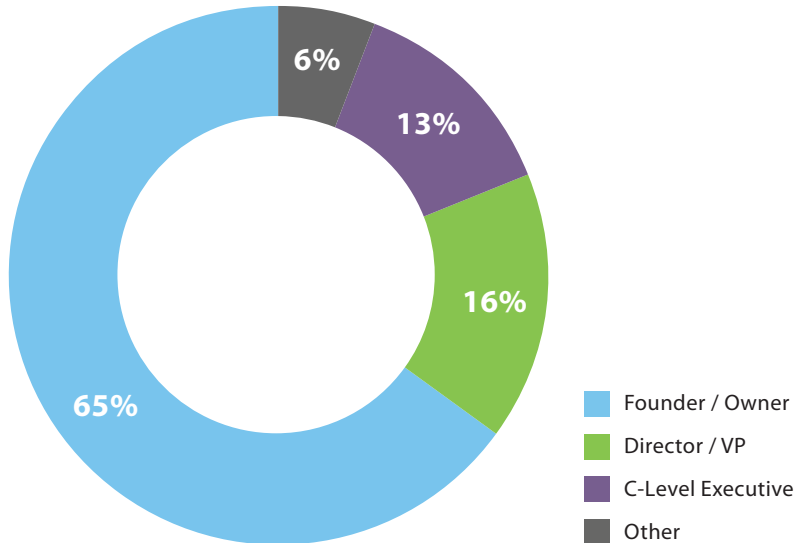
SEMRush and Google Search Console are the two most popular SEO tools at 45% and 44%, respectively. Ahrefs, Yoast, and MOZ are all squarely in the middle of the pack. Notable "Other" tools were RavenTools, Hike, Screaming Frog, and BrightEdge.



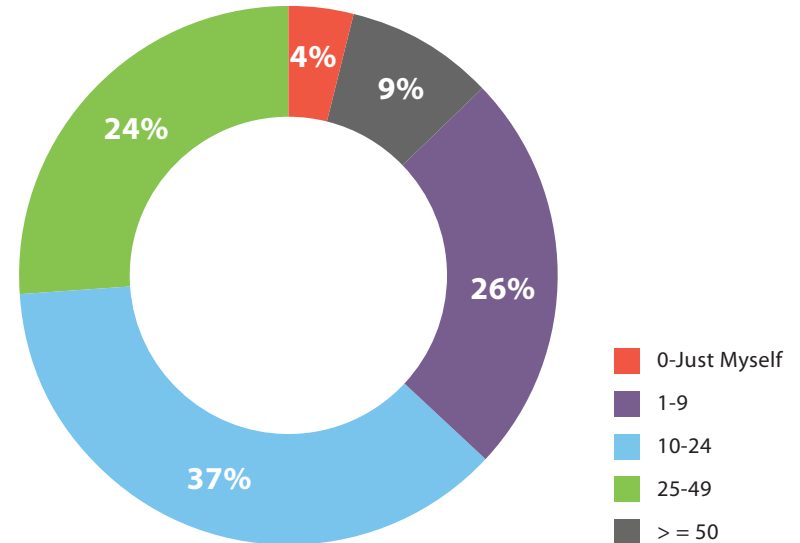
Demographics

Recently, 95 Bureau shops completed a survey sharing what tools they use to run their agency. The respondents ranged in size from solo flyers to shops with hundreds of employees. The majority were in the 10-24 range, with 1-9 and 25-49 coming in a close second and third. 94% of those who responded were director-level or higher. All offered some mix of digital services.

RESPONDENT ROLE



COMPANY SIZE



Complete List of Winners

Accounting Tools:  **intuit quickbooks.**

HR Tools:  **gusto**

Hiring Tools:  **bambooHR™**

Culture Tools:  **Lattice**

Capacity Tools:  **Google Sheets**

eSign Tools:  **DocuSign®**

Proposal Software Tools:  **PandaDoc**

Design Tools:  **Figma**

Issue Tracking Tools:  **Jira**

Project Management Tools:  **Google Sheets**

Analytics Tools:  **Google Analytics**

Marketing Automation & CRM Tools:  **HubSpot**

SEO Tools:  **SEMRUSH**



About the author

Nicholas Petroski is a Managing Partner at [Promethean Research](#). Since 2015, Nick has helped digital firm owners better understand their industry and chart more effective paths to success. Prior to co-founding Promethean, Nick worked as an equity analyst at a Wall Street firm where he covered the enterprise software and semiconductor industries. When he's not in the office, you can find him backpacking around the Midwest or making elaborate firewood in his wood shop.

