

# Preparing for Your Next Adobe Deal

## Pricing, Packaging, and Negotiation Changes to Watch

Adobe has executed a sophisticated and coordinated pricing and packaging realignment over the past 24 months. AI feature gating, ETLA SKU consolidation, and the erosion of standard commercial terms have shifted the negotiation math in Adobe's favor. This bulletin shows procurement and IT leaders what has changed, where the leverage now lives, and how to negotiate Adobe outcomes that reflect real customer requirements and value.



## The Adobe Commercial Landscape Today

### A VENDOR WITH MOMENTUM AND PRICING POWER

Adobe has expanded from desktop creative tools into a coordinated suite spanning Creative Cloud, Document Cloud, and Experience Cloud, with AI features bundled across each. Today the vendor is mission-critical for marketing, design, and digital teams, creating a footprint that compounds these procurement challenges:

- **Limited substitution.** Creative Cloud's flagship apps (Photoshop, Illustrator, InDesign, Premiere) have few enterprise-grade alternatives, limiting competitive leverage on the core Creative stack.
- **AI as a revenue lever.** Firefly, AI Assistant, Acrobat Studio, and Agentic AI in Experience Cloud are being used to justify list-price increases and force upgrade paths inside the existing customer base.
- **ETLA cycle compression.** The three-year ETLA cycle gives Adobe a long runway to engineer new versions, bundles, and AI features that become "required" components of the next deal.

## Where Enterprises Are Overpaying

Understanding where spend leaks occur is a prerequisite to effective negotiation. NPI's analysis of enterprise Adobe contracts identifies four common overpayment vectors:

### ETLA RENEWAL ESCALATION

20 to 30% renewal increases are now typical even when nothing has changed – no volume changes, no product changes. When required product upgrades are bundled in, increases routinely top 80%. The three-year ETLA cycle gives Adobe time to engineer new versions, bundles, and AI features and position them as required at renewal.

### ACROBAT STUDIO OVER-PACKAGING

Approximately half of Q4 ETLA renewals included an Acrobat Studio upgrade, adding \$200+ per user per year. The bundle includes Acrobat Pro, AI Assistant, Adobe Express, and Firefly tools. Clients who only need basic PDF functionality pay full Studio cost for capability they never use.

### FORCED PREMIUM STOCK BUNDLING

All Apps Edition 4 with Premium Stock is the new default Creative Cloud ETLA SKU. Adobe reps are heavily incentivized to land Premium Stock, but the SKU is available without it. Procurement teams that validate actual stock-asset needs before agreeing consistently right-size away from the default.

### EXPERIENCE CLOUD METRIC SHIFTS AND PREMIUM TIERS

Customer Journey Analytics is the rep-incentivized upgrade replacing Adobe Analytics – more expensive and priced on a different metric. When the licensing metric changes, historical benchmarks no longer apply. Premium support and success tiers priced as a percentage of license spend scale up automatically with every renewal and product upgrade.

## Key Cost Drivers at a Glance

**20-30%+**

**Typical ETLA  
Renewal Increase**

Even when nothing has changed – no volume changes, no product changes

**80%**

**Renewal Increase with  
Required Upgrades**

All Apps Ed. 4 + Premium Stock and Acrobat Studio are the new defaults – and they reset the baseline

**~50%**

**of Q4 ETLA Renewals**

Upgraded to Acrobat Studio at \$200+ per user per year, often for users who only need basic PDF

## Pre-Renewal Preparation: The Five Imperatives

Regardless of where an organization sits in its Adobe renewal timeline, the following preparation disciplines are non-negotiable for achieving a defensible negotiation outcome:

### IMPERATIVE 1

#### Start 6-9 Months Before Renewal

Six to nine months prior to renewal is the minimum effective preparation window. Adobe will compress your timeline so own the schedule before they do. Late engagement eliminates leverage and invites auto-renewal at full list.

### IMPERATIVE 2

#### Right-Size by User Persona First

Independently validate which licensing option best meets your needs by user persona. Don't take Adobe's word for what your users require. It is difficult to claw back a higher-tier license choice once Adobe locks in that revenue.

### IMPERATIVE 3

#### Validate the Bundle Against Actual Use Cases

For every upgrade Adobe positions as required (e.g. Premium Stock, Acrobat Studio, AI Assistant, CJA) confirm with business owners that there is a documented use case. SKUs without a named accountable owner should not appear in the renewal.

### IMPERATIVE 4

#### Benchmark Against Independent Market Data

Bundled deals and renamed SKUs make internal benchmarks unreliable. SKU-level peer pricing data provides a factual counterpoint to Adobe's proposals. Without it, procurement teams negotiate from a position of information asymmetry.

### IMPERATIVE 5

#### Make Every Commercial Term Explicit

Renewal caps, true-up rates, swap rights, and metric definitions are no longer standard. The protections that held the prior contract together have to be re-negotiated, not assumed. Every term left implicit is a term Adobe will reset in its favor at renewal.

Starting early is the single most cost-effective negotiation strategy available to any Adobe customer.

It is difficult to claw back a higher-tier license choice once Adobe locks in that revenue. Right-sizing must happen before signature, and that requires runway that must be budgeted into your internal renewal preparation timeline.

## Specific Negotiation Guidance

### ON CREATIVE CLOUD AND DOCUMENT CLOUD ETLAs

- **Don't accept Premium Stock by default.** Validate actual stock-asset needs before agreeing to the upcharge. If you don't need stock, demand the Edition 4 SKU without it.
- **Don't auto-upgrade to Acrobat Studio.** For users who only need basic PDF functionality, hold the line on Acrobat Pro pricing. Quantify how many users will actually use AI Assistant, Express, and Firefly before paying for them.
- **Right-size by user persona, license-by-license.** Independently validate which licensing option each persona needs and document the rationale.
- **Lock in renewal caps, true-up rates, and swap rights in writing.** These standard protections are the ones most likely to be quietly dropped from the next ETLA.

### ON EXPERIENCE CLOUD

- **Run a structured competitive evaluation.** Unlike Creative Cloud, every Experience Cloud product has a credible alternative. RFIs and RFPs work here and meaningfully change Adobe's posture even when you don't intend to switch.
- **Validate metric definitions in writing for any product migration (Adobe Analytics to CJA, Audience Manager to RTCDP).** When the licensing metric changes, historical benchmarks lose force and Adobe chooses how the new metric is measured.
- **Expect a step-up on renewal even with flat volumes.** Cap language from prior 3-year deals is rarely re-extended at the original terms. Be sure to model the next-cycle exposure before signing.

### ON USAGE-BASED PRICING AND PREMIUM SERVICE TIERS

- **Model the worst-case scenario, not just planned usage.** Credit-based models make it harder to assess true competitiveness. Ask Adobe for the equivalent traditional pricing so you can compare apples to apples.
- **Quantify the actual support value used in the prior term.** Premium service tiers priced as a percentage of license spend scale automatically with every renewal. Right-size where consumption doesn't justify the percentage.

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## Turning Preparation Into Negotiation Power

Adobe is growing as fast as the broader software market, and AI is becoming the primary revenue lever. Enterprise customers are absorbing the price increases, and Adobe has neither the incentive nor the market pressure to give back at the table without disciplined customer-side preparation.

The most powerful lever in any Adobe negotiation isn't the size of the contract; it's the quality of the preparation. Prepare accordingly.

The strongest Adobe deal outcomes aren't negotiated at the table.

They're built months in advance through disciplined preparation, independent usage data, internal alignment, and benchmark-backed insight.

## About NPI

NPI is the premier provider of data, services and tools to help large enterprises identify and eliminate overspending on IT purchases. NPI delivers transaction-level price benchmark analysis, license and service optimization analysis, and vendor-specific negotiation intel that enables IT buying teams to drive material savings and measurable ROI. NPI analyzes billions of dollars in spend each year for clients spanning all industries that invest heavily in technology. NPI also offers software audit, audit defense, and asset management services. For more information, visit [npifinancial.com](https://npifinancial.com).