



# 2018 Adobe Consumer Content Survey

United States Results

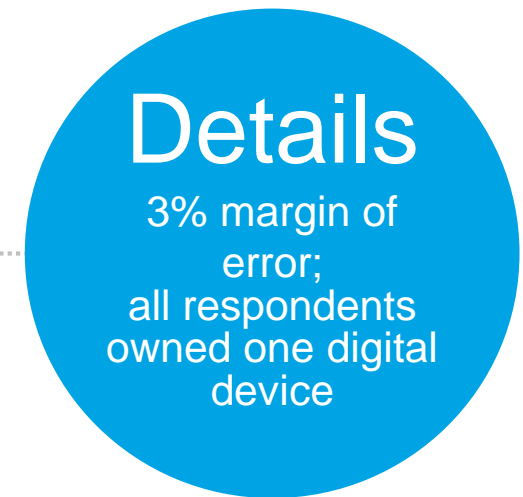
Research Partner:



**ADVANIS**

# Methodology

Adobe conducted an online survey about people's content habits in the U.S.



# Top Survey Highlights



Consumers spend on average 1/3 of their day engaging with digital content



Consumers have become more cautious sharing and viewing content in the last 5 years



Consumers reject poor experiences



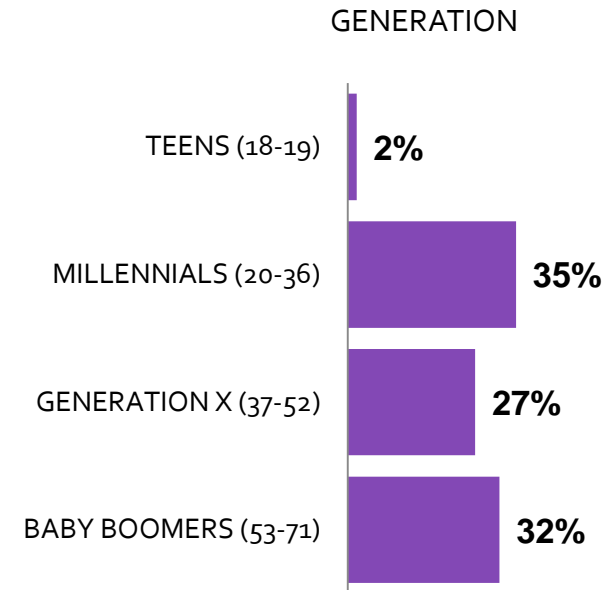
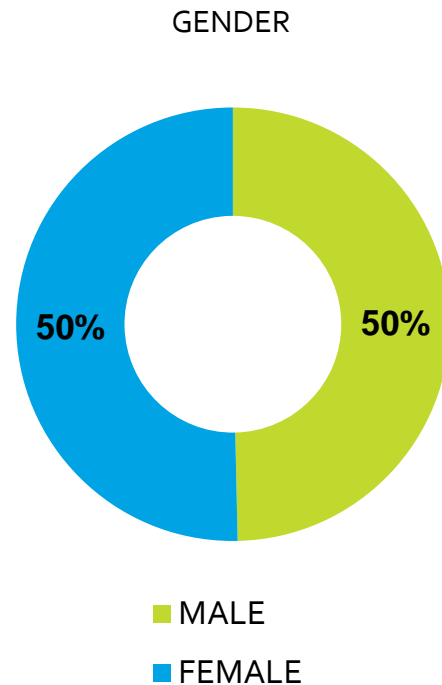
Consumers aren't only multi-tasking, they're multi-screening



Consumers engage on multiple channels throughout the purchase process

# Who Participated in the Survey

The survey was conducted with participants aged 18+ who own a digital device (be it a smartphone or a tablet or a computer).



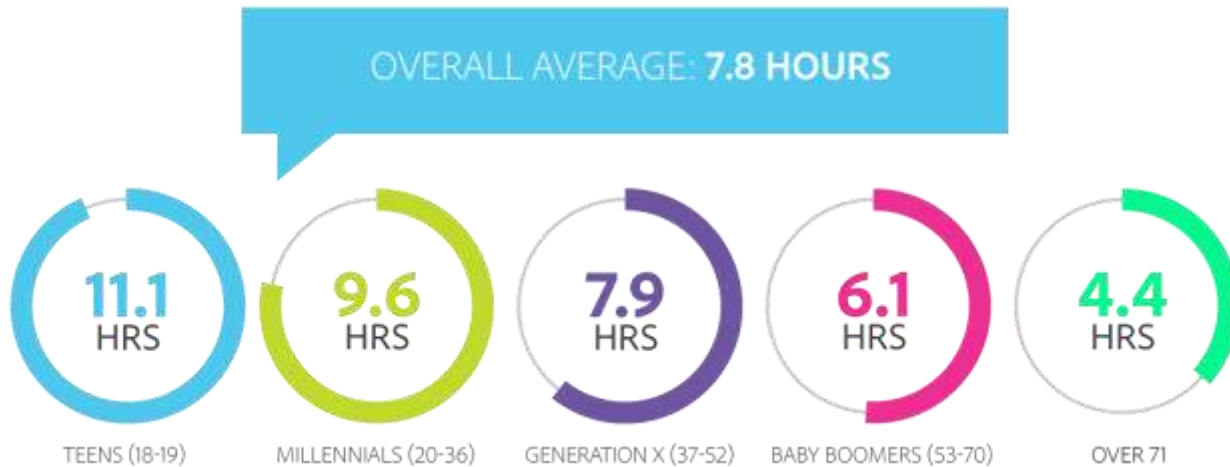


# Device Engagement With Content

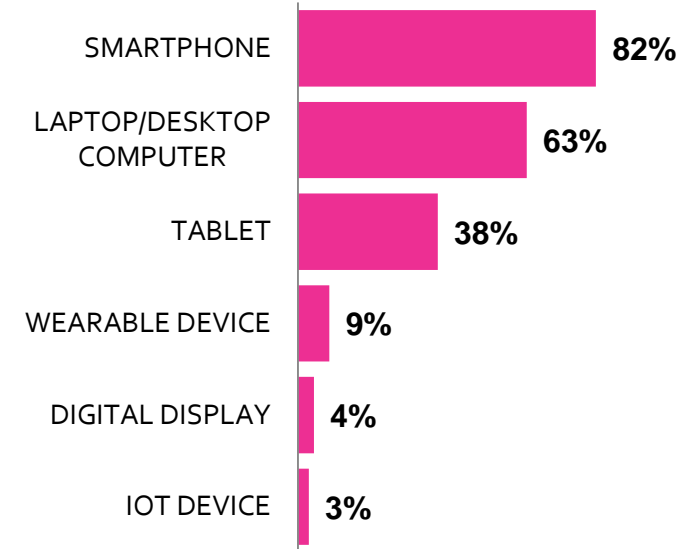


# Content Engagement on Digital Devices

- Consumers spend on average nearly 1/3 of their day engaging with digital content.
- Smartphones are most commonly used to engage with content, followed by laptop/desktop computers.
  - Males prefer to use a laptop/desktop computer (67%) to look at/engage with content, while females prefer smartphones (86%).
  - Millennials and Generation X are also more likely to prefer to use a smartphone to engage with content (92% for both).



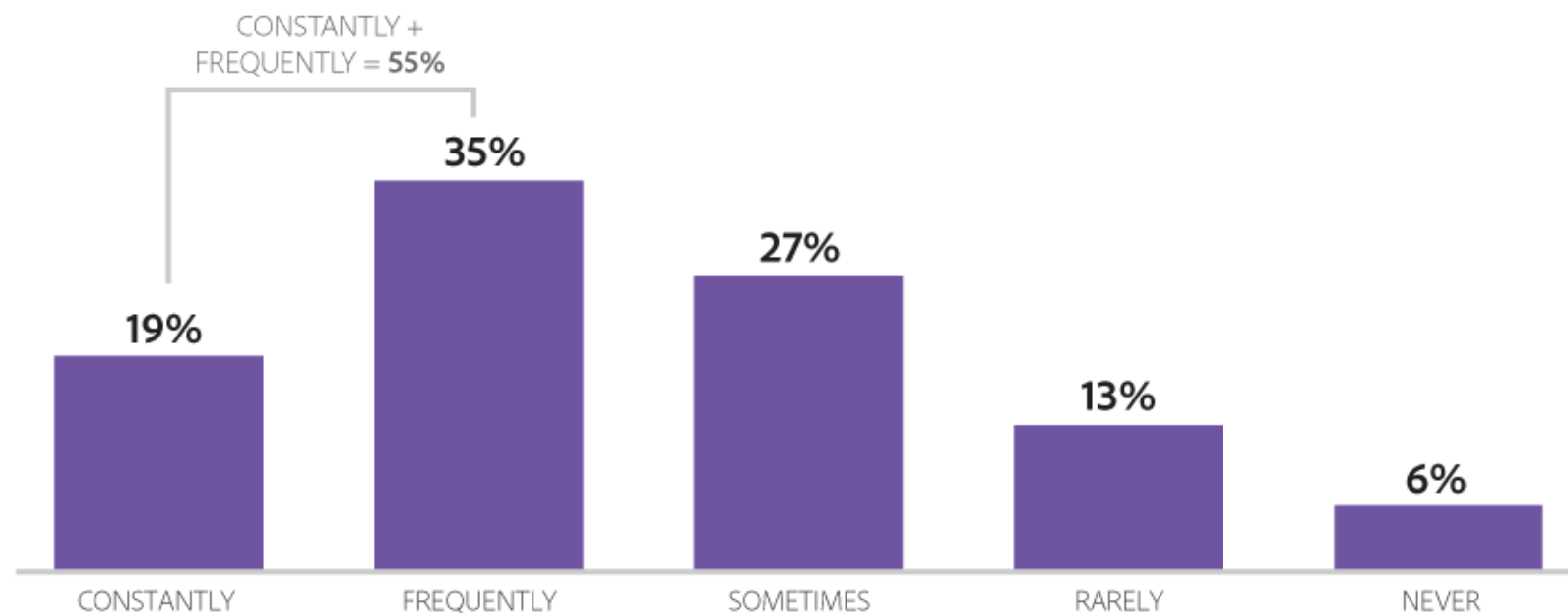
AVERAGE HOURS OF DEVICE USAGE PER DAY BY AGE GROUP



DEVICES USED TO ENGAGE WITH CONTENT

# Multi-screening

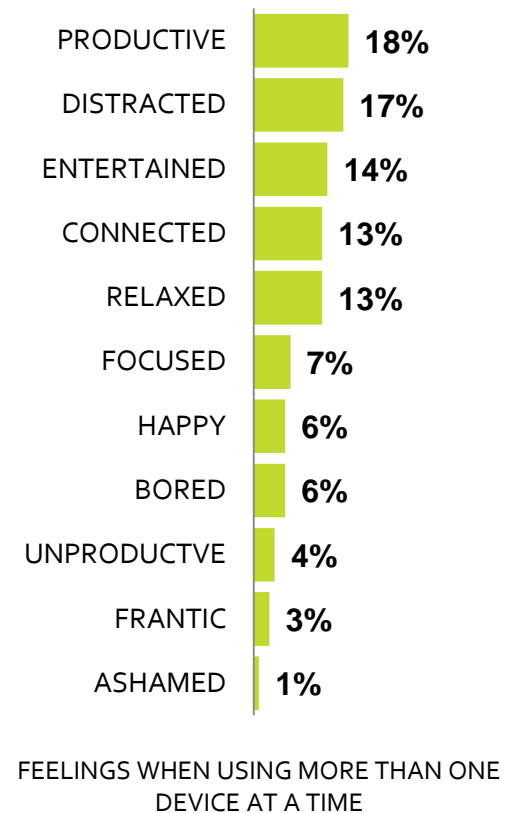
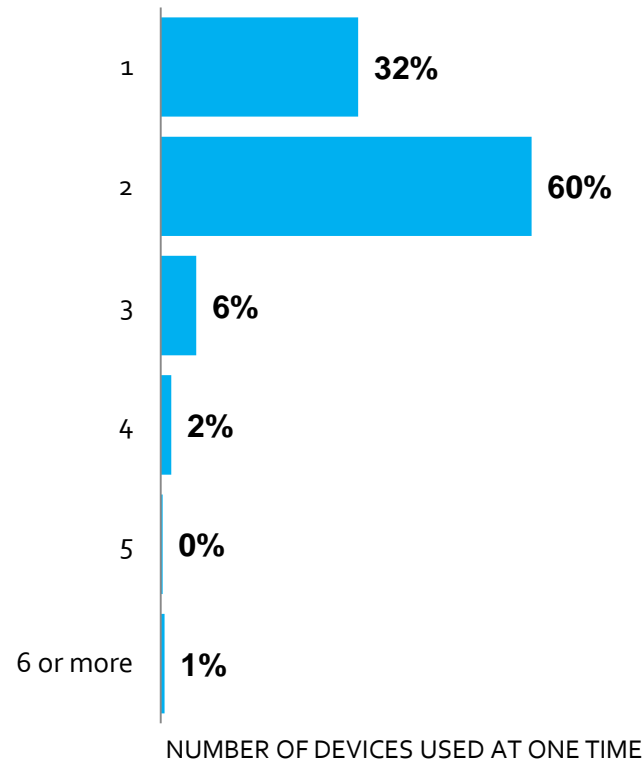
- More than half of consumers constantly or frequently interact with multiple devices at one time.



HOW OFTEN CONSUMERS USE MORE THAN ONE DEVICE AT A TIME

# Emotions When Multi-screening

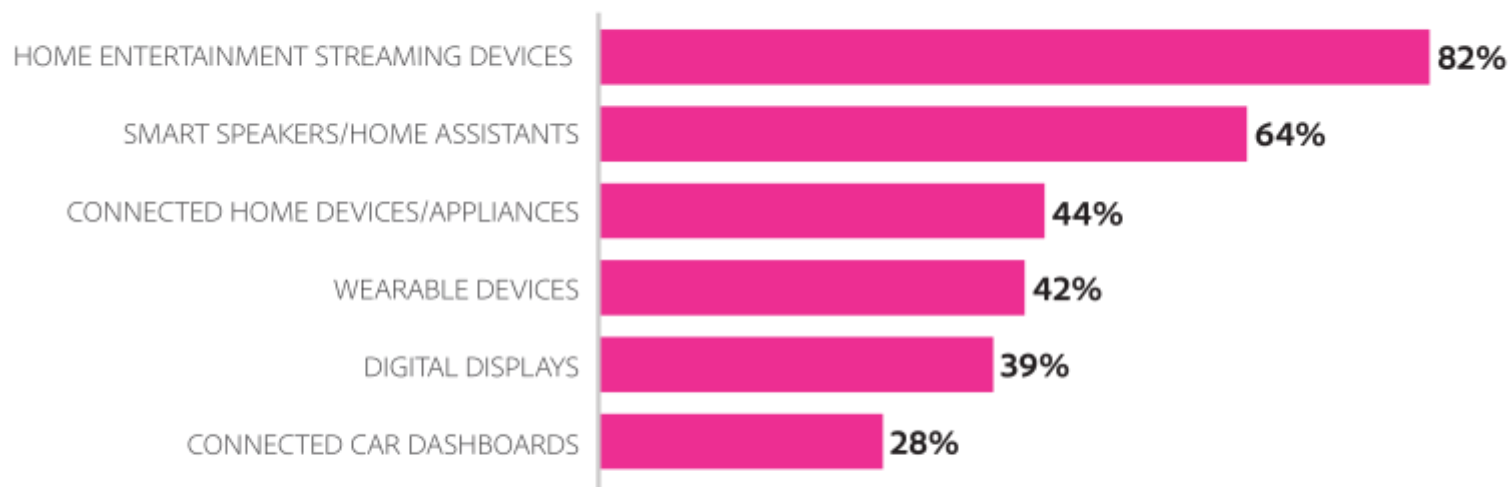
- Most consumers typically use around 2 devices at a time, although newer generations tend to be slightly more comfortable using more than 2 at a time.
- Positive feelings were widespread when consumers are using multiple devices at the same time.
  - ‘Productive’, ‘entertained’, ‘connected’, and even ‘relaxed’ are the most common positive emotions felt when using more than one device at once. The most dominant negative emotion is ‘distracted’.





# Devices to be Used Most in the Next Five Years

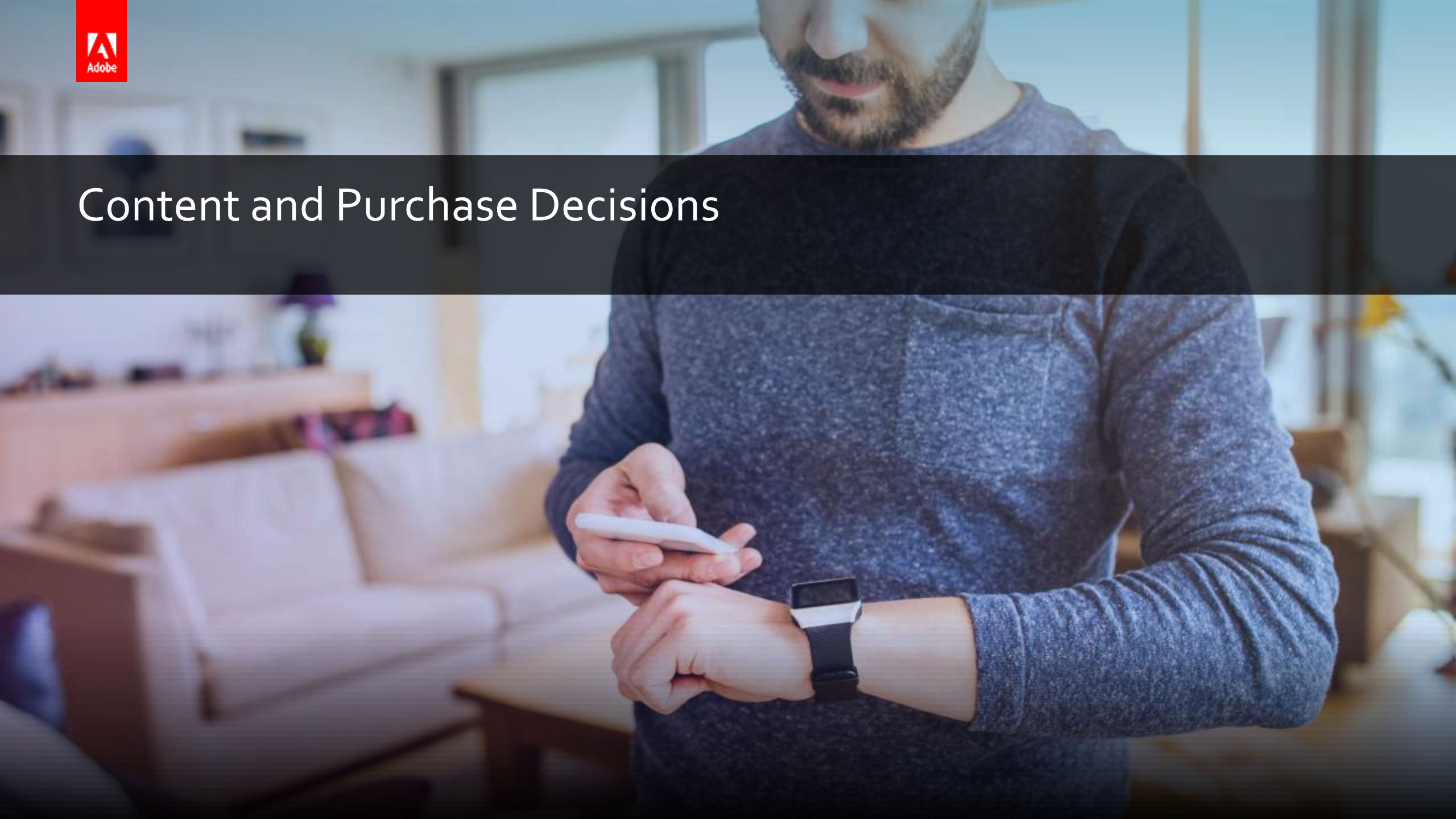
- The devices that are most expected to be used in the next 5 years are connected home entertainment streaming devices, smart speakers/home assistants, and connected home devices/appliances.
  - Females are more likely to expect to use wearable devices (46%) while males are more likely to expect to use connected car dashboards (32%).
  - Millennials are more likely to expect to use smart speakers/home assistants (70%) and wearable devices (47%). Baby boomers are more likely to expect to use digital displays (45%).



TOP DEVICES CONSUMERS EXPECT TO USE MOST IN THE NEXT 5 YEARS



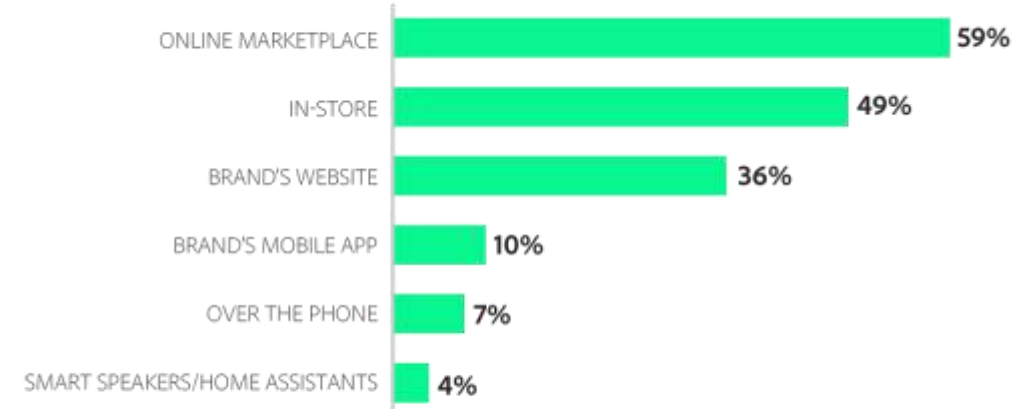
# Content and Purchase Decisions



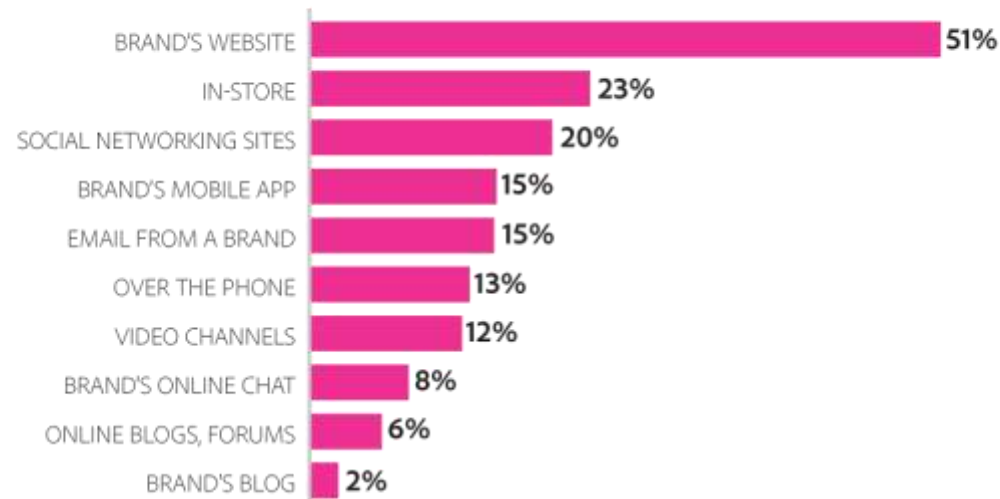
# Consumers Engage on Multiple Channels Throughout the Purchase Process



CHANNELS USED WHEN RESEARCHING A PURCHASE



CHANNELS USED WHEN MAKING A PURCHASE



CHANNELS USED TO INTERACT WITH A BRAND AFTER PURCHASE

# Content Engagement In-store

- Nearly six-in-ten have used a smartphone or other connected device while in-store. Common information needs in-store are reviews and price comparisons.
  - Millennials are much more likely to use their smartphone or other device while in-store, with 71% saying they've done this (66% among Generation X; 42% among Baby Boomers).
  - Baby Boomers are most likely to use a device in-store for price comparisons (59%) or online coupons or offers (59%), while Millennials and Generation X are most likely to use a device in-store to read reviews (67% and 61%, respectively).



USED SMARTPHONE/CONNECTED DEVICE IN A BRICK-AND-MORTAR STORE TO INFORM PURCHASE DECISION



INFORMATION USED ON SMARTPHONES TO INFORM PURCHASE DECISIONS

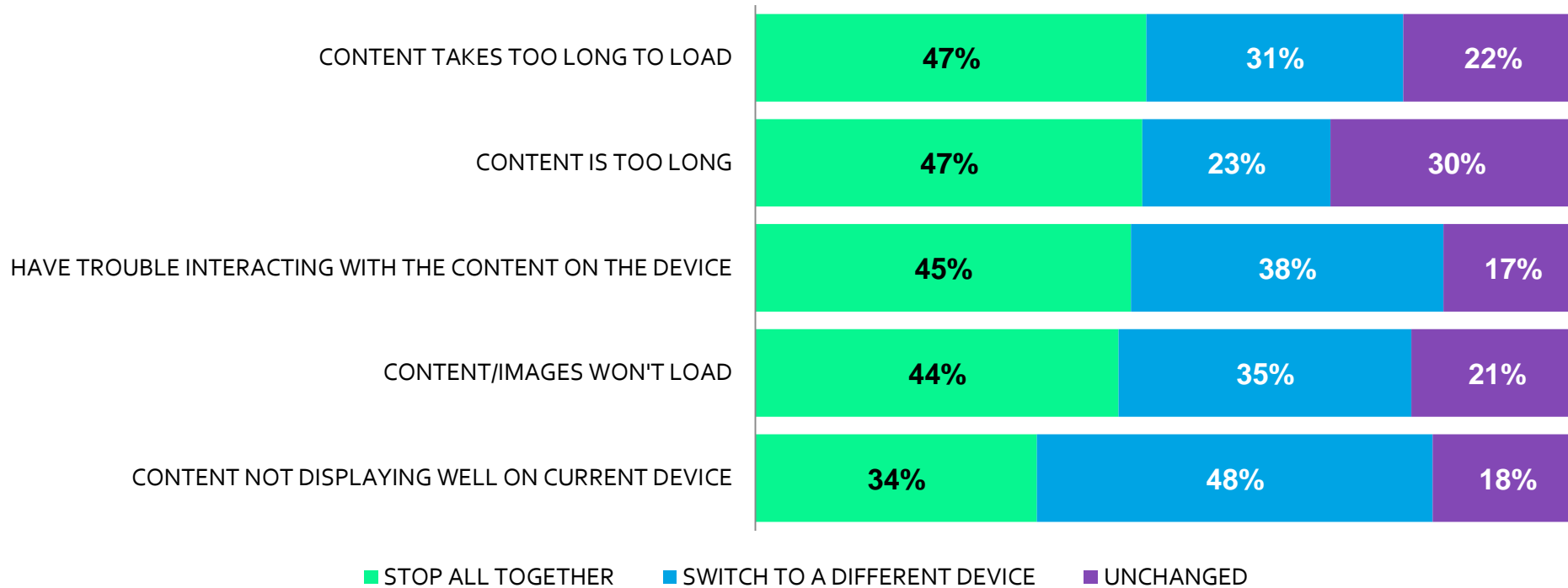


# Content Characteristics



# Content Issues Forcing Consumers to Stop/Switch

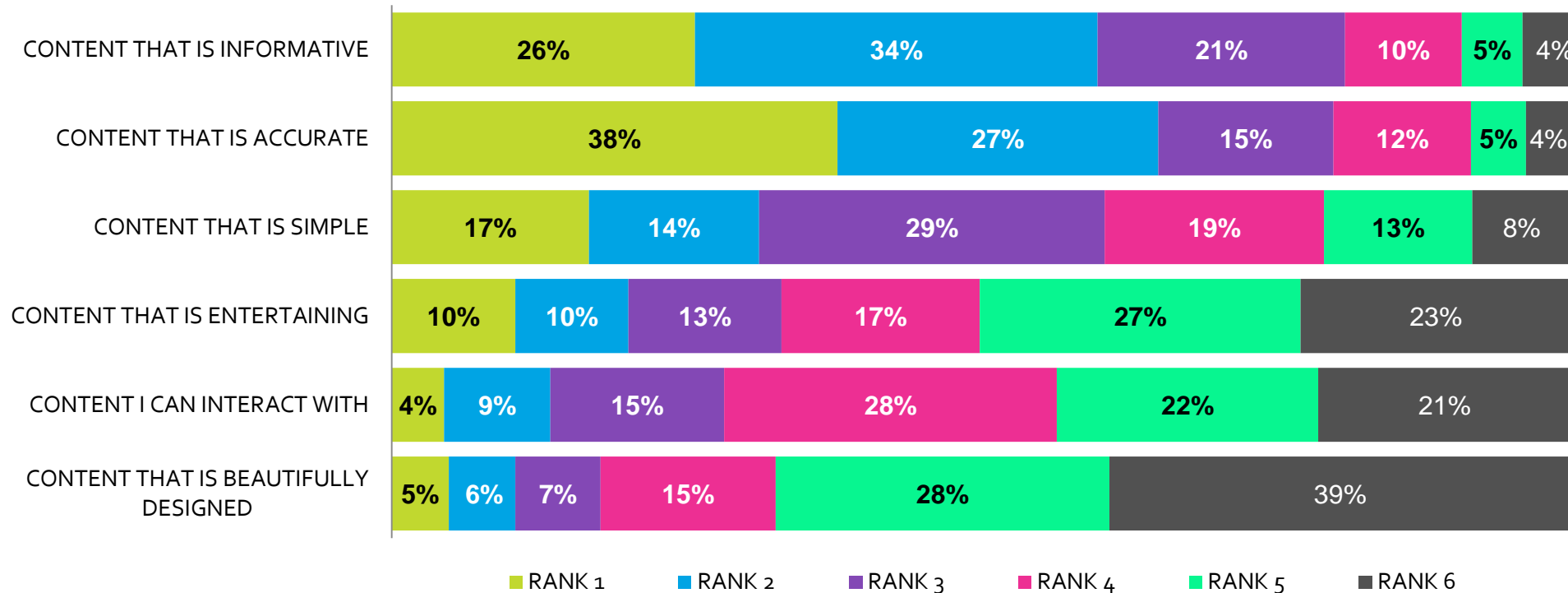
- Taking too long to load, excessively long content, difficulty interacting with content, and not loading are all top content issues that cause nearly half of consumers to stop what they are doing.
  - Baby Boomers are more likely than newer generations to stop what they're doing when they experience any of the following content issues.



PROBLEMS ENCOUNTERED AND REACTIONS TO VIEWING CONTENT ON DEVICES

# Most Important Content Characteristics

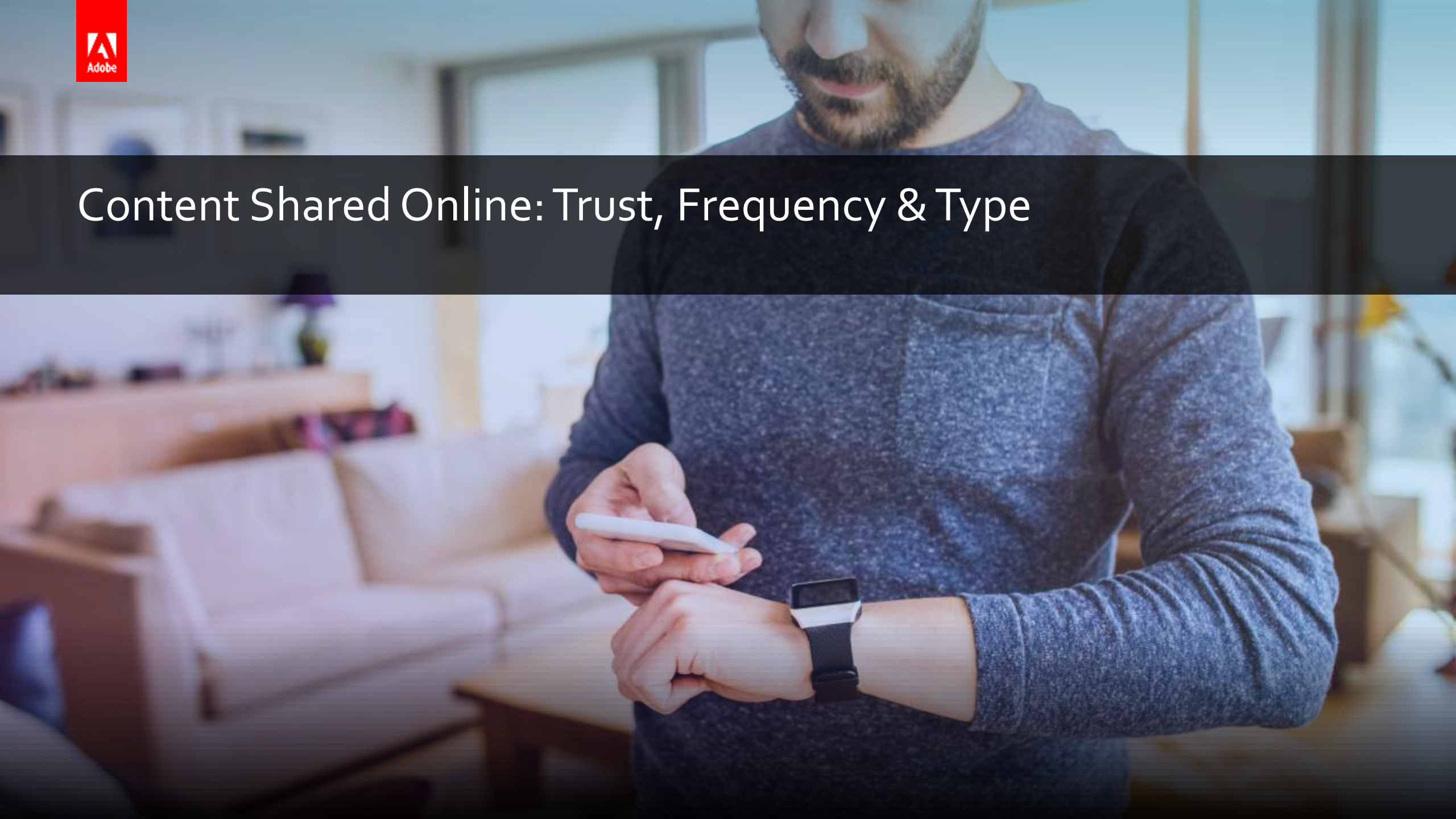
- Consumers are looking for informative, accurate and simple content. Beautiful, interactive, and entertaining content are least important.
  - Baby Boomers consider informative, accurate and simple content to be more important than newer generations (89%, 89%, 66%; Top 3 respectively).
  - Millennials more likely to rank entertaining and beautiful content as more important than older generations (41%, 25%; Top 3 respectively).





Adobe

# Content Shared Online: Trust, Frequency & Type

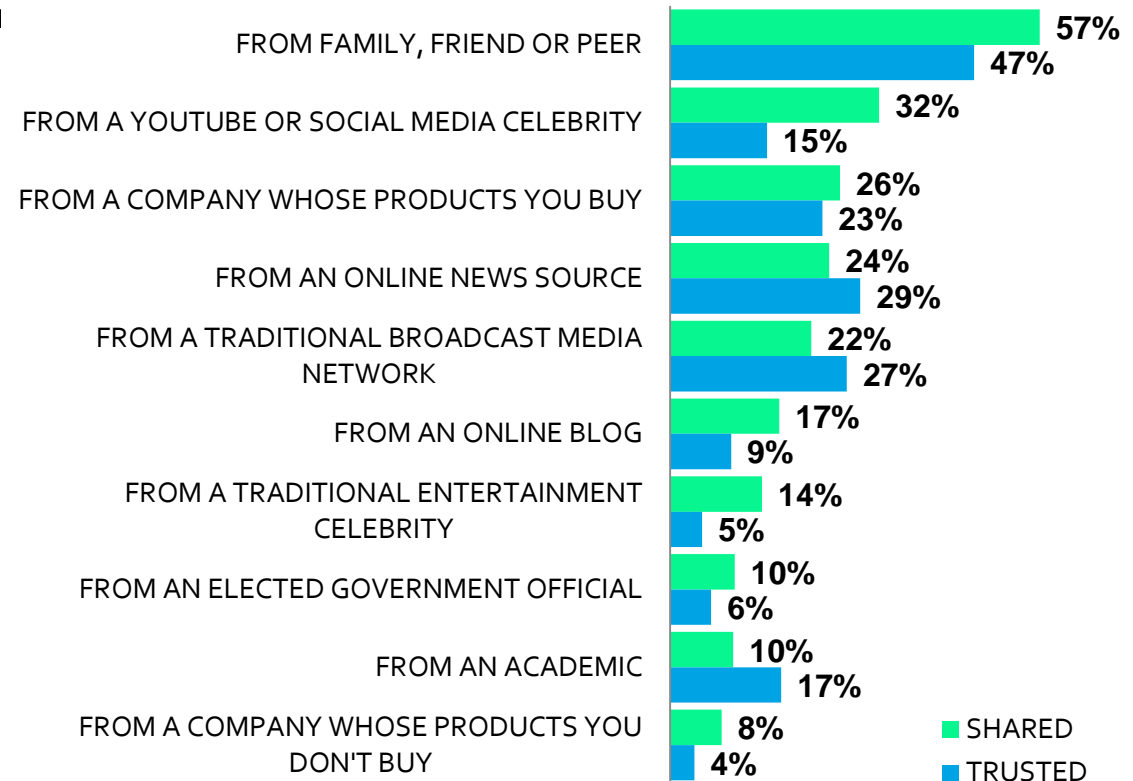
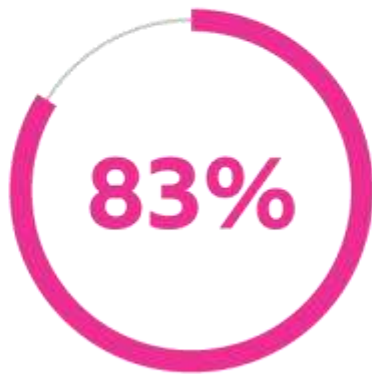




# Content Caution and Trust

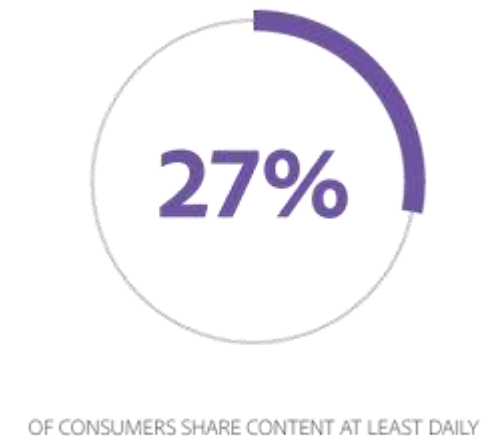
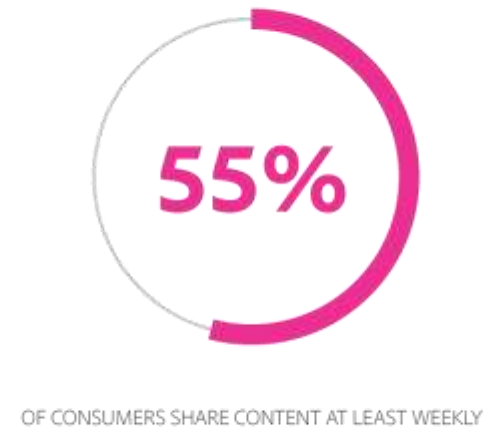
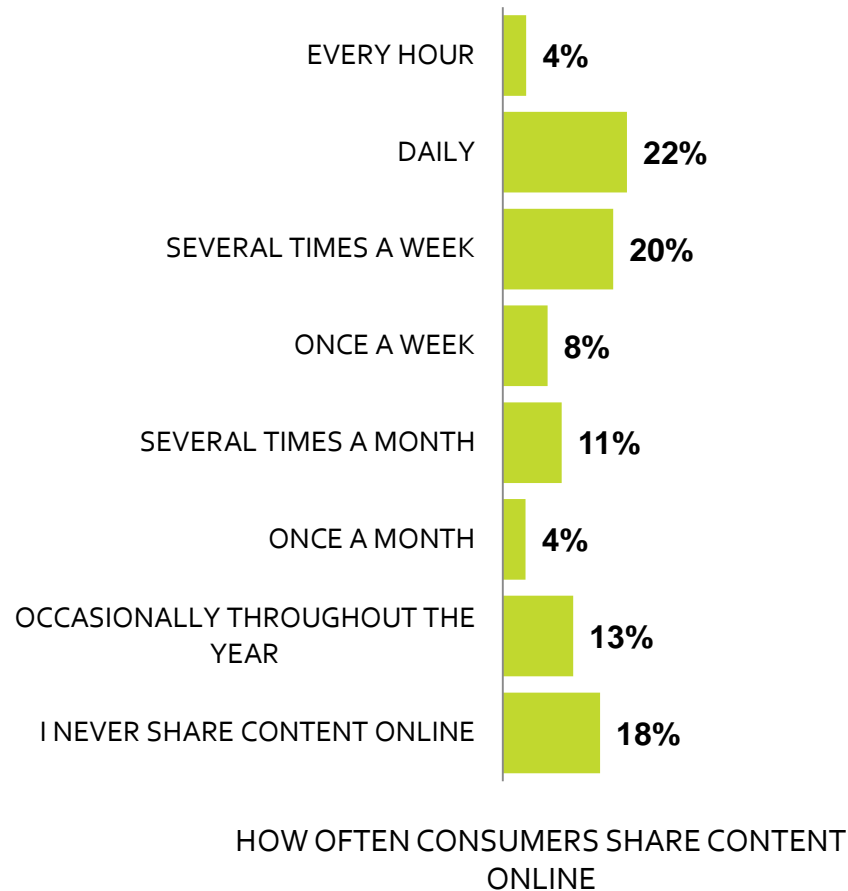
- The vast majority of consumers say they are more careful now when sharing content compared to 5 years ago.
- Content from family and friends is most commonly shared, followed by content from a YouTube or social media celebrity, and content from companies that consumers buy from. Less common is sharing from a company consumers don't buy from, an academic, or an elected official.
- Online news is the 2nd most trustworthy content, followed by traditional broadcast networks. Interestingly, traditional entertainment celebrities are near the bottom of the list in terms of trust.

83% OF CONSUMERS SAY THEY'RE MORE CAUTIOUS WHEN SHARING CONTENT COMPARED TO 5 YEARS AGO



# Frequency of Content Shared Online

- Over one-quarter share content online on a daily basis, while just under one-fifth never share content online. Over half share content on at least a weekly basis. 30% of Baby boomers never share content online, followed by 14% of Gen X and only 6% of Millennials.





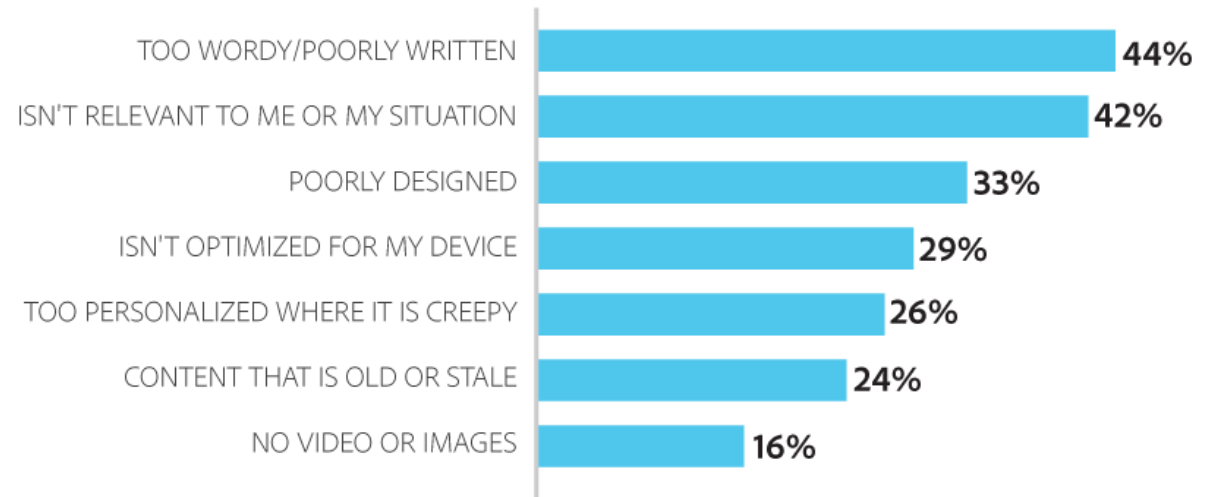
# Content by Brands



# What's Annoying With Content from Brands

- The most annoying aspect of content from brands is content that is too wordy, or poorly written. This is followed by content that is not relevant and content that is poorly designed.
- Across all ages, two-thirds or more say that these annoyances would lead to an abandoned shopping cart.
  - Content that is too wordy/poorly written is the most common complaint among Millennials, Generation X and Baby Boomers.

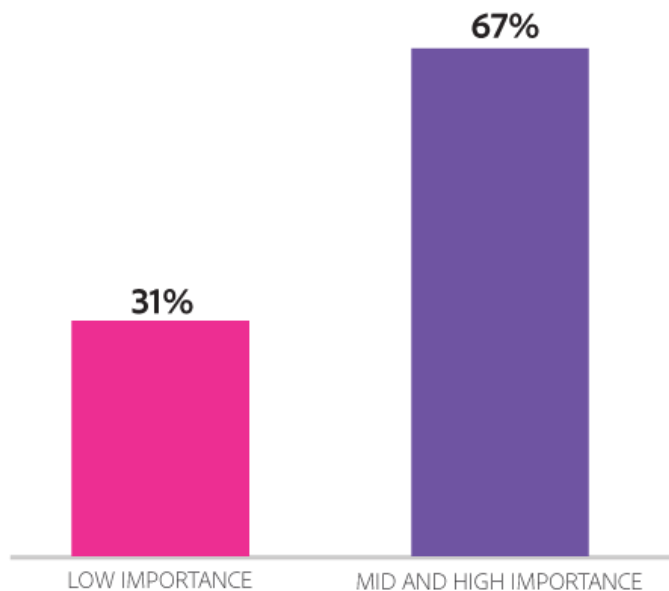
**2/3** OF CONSUMERS WON'T PURCHASE FROM A BRAND IF ANY OF THESE ANNOYING SITUATIONS OCCUR



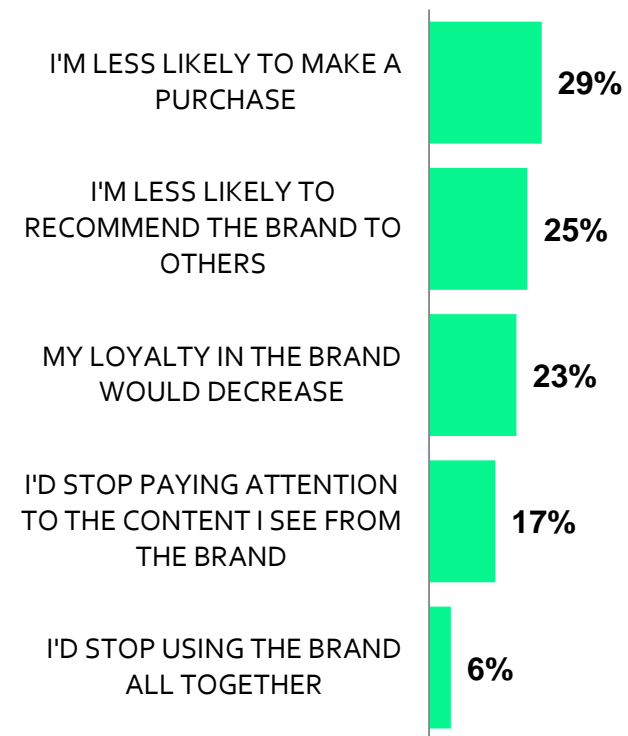
MOST ANNOYING ASPECTS OF BRAND CONTENT

# Importance of Contextual Content

- Consumers are split on the degree of importance of content automatically adjusting based on their current location. Millennials are most likely to consider this of high importance (42%).
- Among those who place mid-to-high importance on context relevance, about one-quarter would be less likely to make a purchase as a result of content not being relevant.



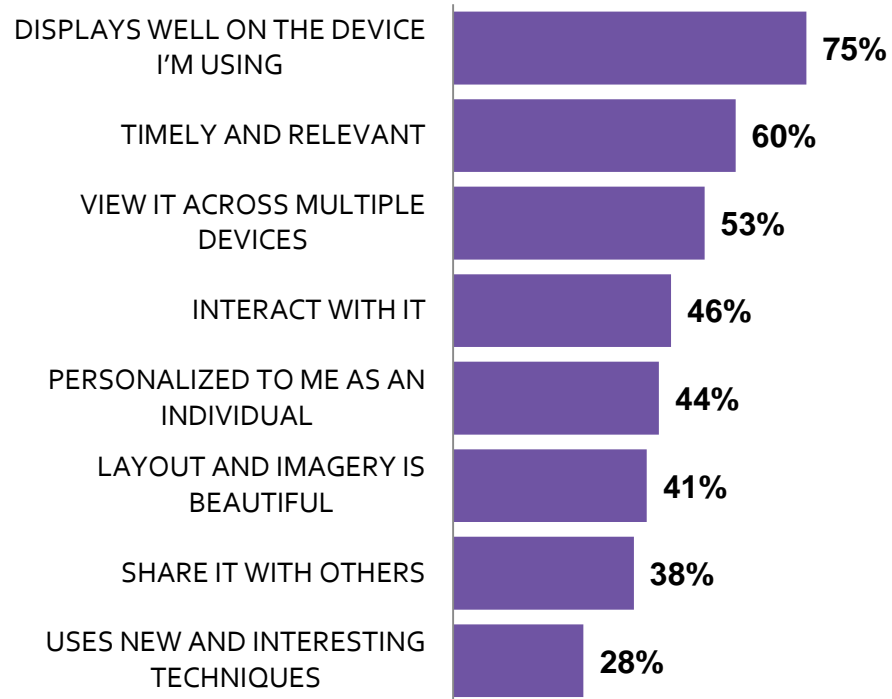
BRAND CONTENT AUTOMATICALLY ADJUSTS BASED ON YOUR CONTEXT



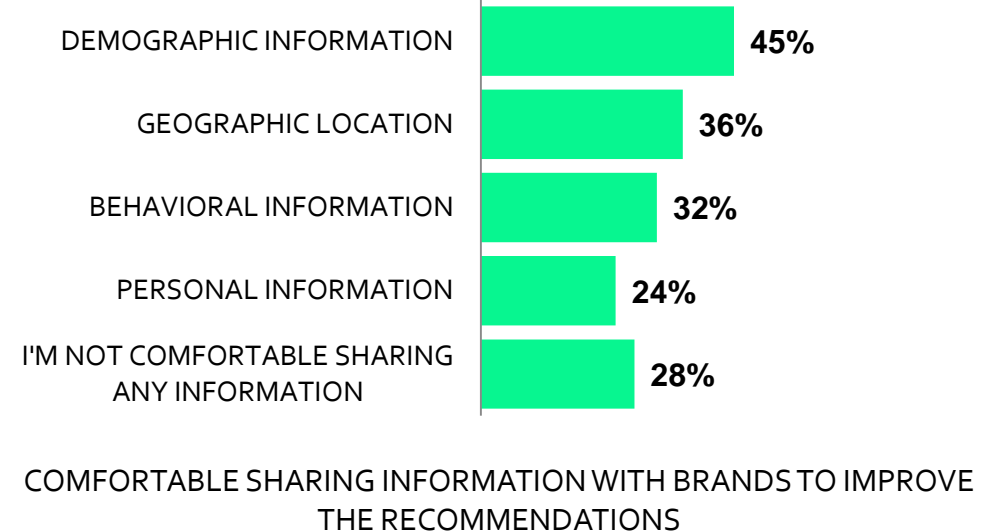
POTENTIAL ACTIONS IF THE CONTENT IS NOT CONTEXTUALLY RELEVANT

# Most Important Brand Content Characteristics

- The most important characteristic for generating a positive experience is for content to display well on the device being used.
- One-third of all consumers are not comfortable sharing any information about themselves with brands to improve recommendations.
  - Millennials and Generation X consumers are more comfortable sharing all forms of information (compared to Baby Boomers).

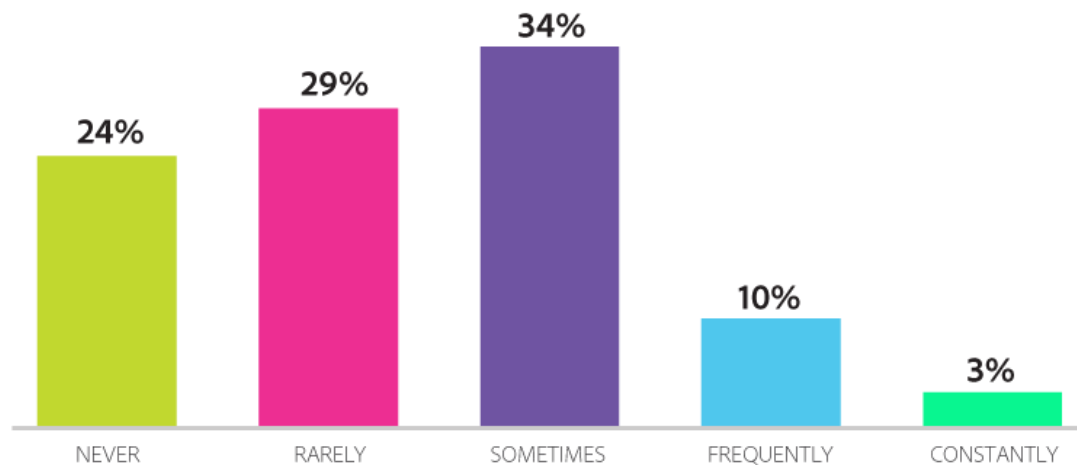


IMPORTANCE OF CHARACTERISTICS FOR GENERATING A POSITIVE EXPERIENCE

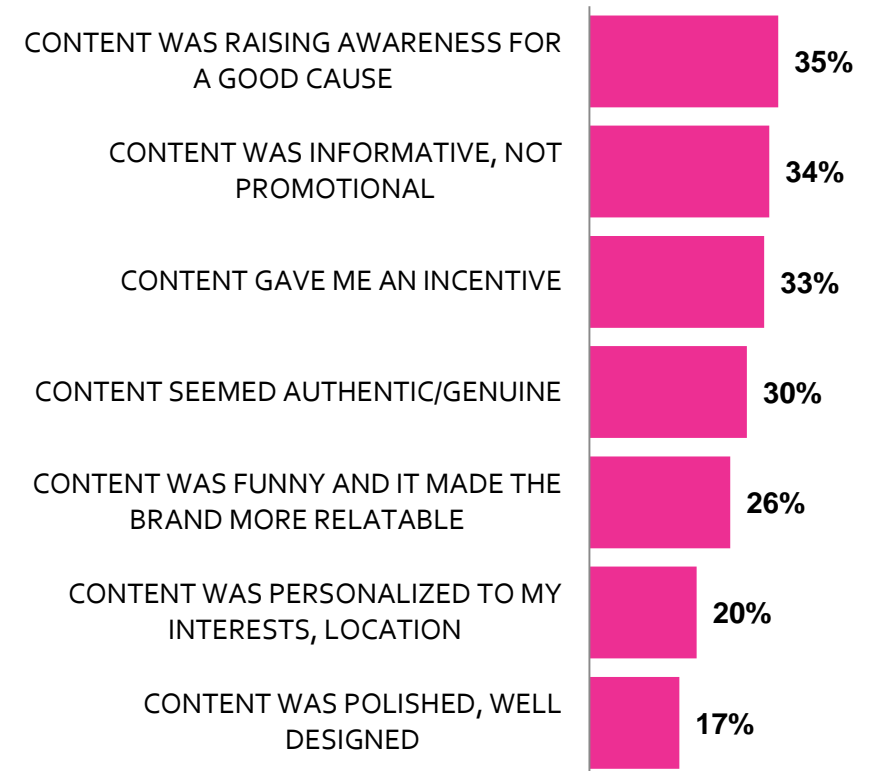


# Brand Content Shared Online

- Only 13% share content online from brands constantly or frequently (23% among Millennials). The main reasons why content online from brands is shared include raising awareness for a good cause, being informative and not promotional, and incentives.



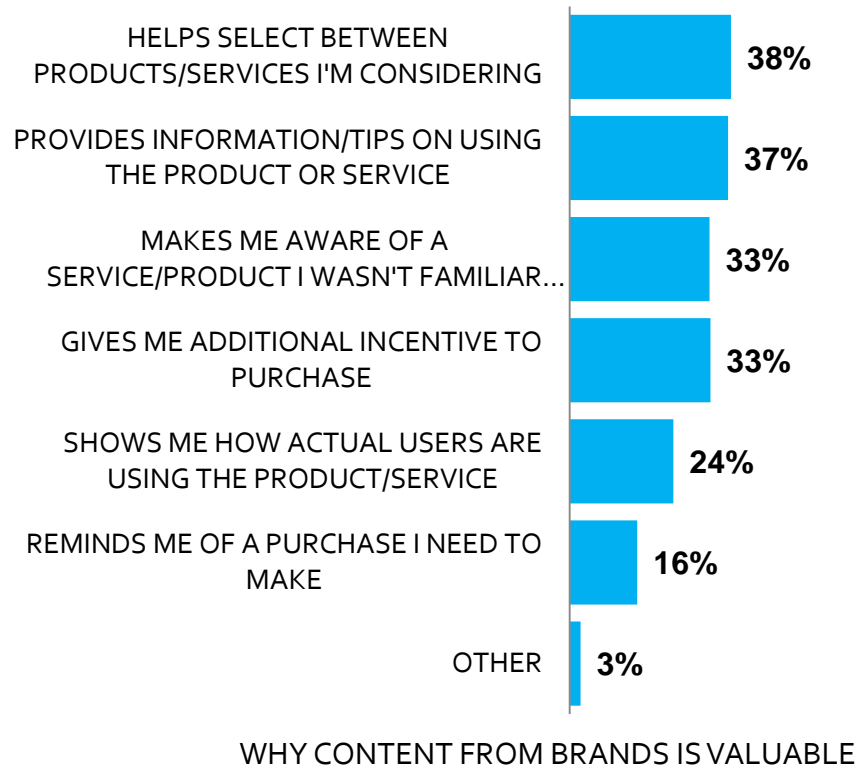
FREQUENCY OF SHARING CONTENT FROM BRANDS



MAIN REASONS TO SHARE CONTENT FROM BRANDS

# Shared Content Impacts

- Content is most often considered valuable because it helps select between different products/services under consideration, provides information/tips on how to use a product or service, or makes people aware of a service/product they aren't familiar with.
- Nearly half have made a purchase based on the online content of a brand. Millennials (53%) are less likely than other generations (60%) to make a purchase based on online brand content.







**Adobe**

**MAKE IT AN EXPERIENCE**