



The State of Content: Expectations on the Rise

October 2015

Methodology

WHO

- U.S. consumers
- 18+ years old
- Use at least one digital device

HOW MANY

N Total: 2,008 consumers

* Survey A: 1,002 consumers

* Survey B: 1,006 consumers

WHEN

Data collection occurred
September 12 - 16, 2015

Margin of error (total sample) = +/- 2.19

* Note: With range and depth of answers required, survey was split into two 20 minutes surveys, shown as Survey A and Survey B.

Summary of Key Findings

With the explosion of content, time-starved consumers are increasingly selective of what they're viewing and reading.

- Consumers use an average of 6 devices and consume 12 sources of content; Millennials use an average of 7 devices and 14 sources (Slide 7)
 - Smartphones are the most frequently used device by millennials (Slide 8)
- Nearly 9 in 10 consumers (88%) say they multiscreen, and use an average of 2.42 devices at the same time (Slide 10)
- Forty percent of consumers report feeling “distracted” when multiscreeing; Millennials report higher levels of distraction (48%) than other generations (Slide 10)
- With time at a premium, they have to prioritize. When limited to a 15 minute window to consume content 66% would rather watch a video on breaking news vs. read an article (Slide 11)

Continued next page

Summary of Key Findings (continued)

Accuracy is under attack. Entertainment value becomes increasingly important to break through the noise consumers are skeptical of content's authenticity.

- One quarter of consumers say they value content that is entertaining over accurate (Slide 12)
- Over one-third (35%) of Millennials value entertainment over accuracy -- more highly than other generations (Slide 12)
- Forty-two percent of Millennials do not regularly check to see if the content they are sharing is accurate (Slide 13)
- Consumers question whether a news article is biased (61%), if an ad photo has been altered (60%), or if an author has been paid/incented to post a positive review (60%) (Slide 14)
- Seventy-two percent of consumers trust content from a family member/friend, over a weaker relationship such as a celebrity or YouTube star (31%) (Slide 15)
- Nearly 7 in 10 (68%) trust a report from an eyewitness more than one from a news anchor (32%) (Slide 16)
- More Millennials are likely to question the authenticity of online content, even when it's shared by a peer, versus other generations (Slide 17)

Continued next page

Summary of Key Findings (continued)

As consumers' standards rise, so does the pressure on content producers. Content must be well-designed and easy to consume or they risk losing their audience.

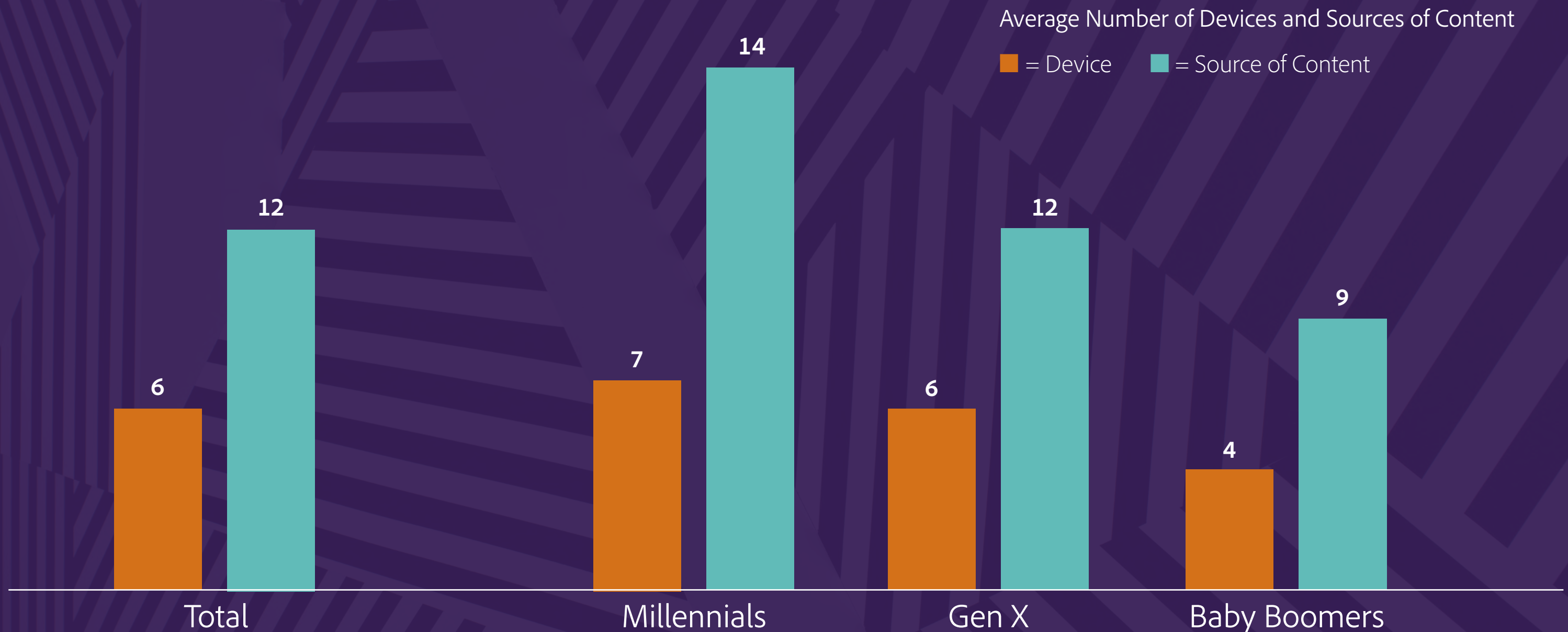
- More than 7 in 10 (73%) say content “must display well on the device” (Slide 19)
- With only 15 minutes to consume content, 66% would prefer to view something beautifully designed vs. simple and plain (Slide 18)
- Key reasons consumers switch devices or give up on content altogether (Slide 20):
 - Images won't load – 46% switch devices; 39% stop engaging
 - It takes too long to load – 44% switch devices; 39% stop engaging
 - Content is too long – 30% switch devices; 38% stop engaging
 - The content is unattractive in its layout or imagery - 35% switch devices; 38% stop engaging

Continued next page

Detailed Findings

Consumers are constantly plugged in and face an explosion of online content across a variety of devices and sources

Consumers use an average of **6** devices and **12** sources of content. Millennials use even more.



S4: How frequently, if ever, do you use each of the following devices and services? Rounded mean of devices/services selected shown. N: 2008; Millennials: 678, Gen X: 722, BB: 608

Note: Devices include items such as smartphones, laptop/desktop computers, TVs, and sources of content include search engines, cable/satellite TV service, social networking site, text messaging and more.

Laptop/desktop is the most commonly used device, but smartphone is most commonly used by Millennials.

Top devices based on daily usage

	Total	■ Millennials	■ Gen X	■ Baby Boomers
1	Laptop/Desktop	Smartphone	Laptop/Desktop	Laptop/Desktop
2	Smartphone	Laptop/Desktop	Smartphone	Smartphone
3	Tablet	Tablet	Tablet	Tablet

* Full list of Devices and Services in Appendix

S4. How frequently, if ever, do you use each of the following devices and services? N:2008

Surfing the web, social networking, and cable/satellite TV are the top services used across generations

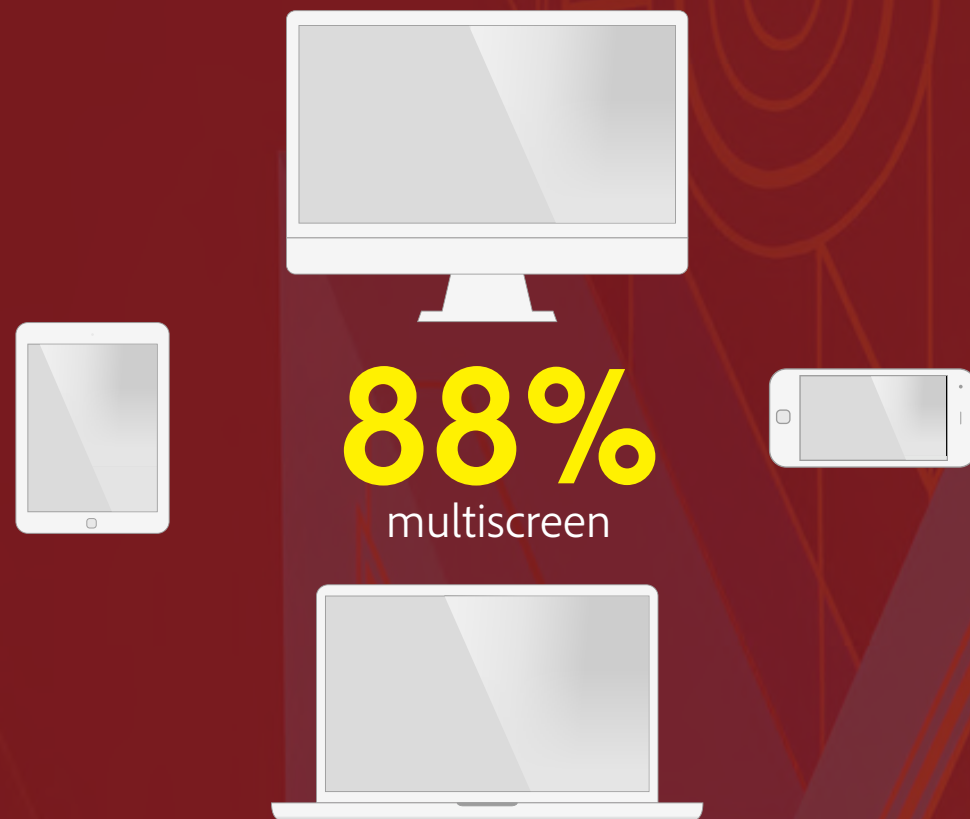
Sources of content based on daily usage

	Total	■ Millennials	■ Gen X	■ Baby Boomers
1	Online search engines	Online search engines	Online search engines	Cable/Satellite TV
2	Cable/Satellite TV	Social networking sites	Cable/Satellite TV	Online search engines
3	Social networking sites	Messaging	Social networking sites	Social networking sites
4	Messaging	Cable/Satellite TV	Messaging	Messaging
5	Streaming Services	User-generated online video platforms	Online news sources	Online news sources

* Full list of Devices and Services in Appendix

S4. How frequently, if ever, do you use each of the following devices and services? N:2008

Consumers are using more than two devices at the same time and admit they are distracted



When multiscreening, consumers use an average of **2.42** devices at the same time

Feelings using multiple screens (% Selecting)

Distracted

40%

Focused

60%

Millennials
48%

Gen X
33%

Baby Boomers
36%

Q3. Which of your devices do you regularly use at the same time? N: 2008

Q5. When you think about how you feel while you are using multiple screens at the same time, which of each pair best describes your feelings? N: 2008; Millennials: 678, Gen X: 722, BB: 608

Time-constrained consumers must prioritize and prefer certain types of content

With Only 15 Minutes to Consume Content (% Selecting)

Skimming articles on trends

Long article on one issue



Video report on breaking news

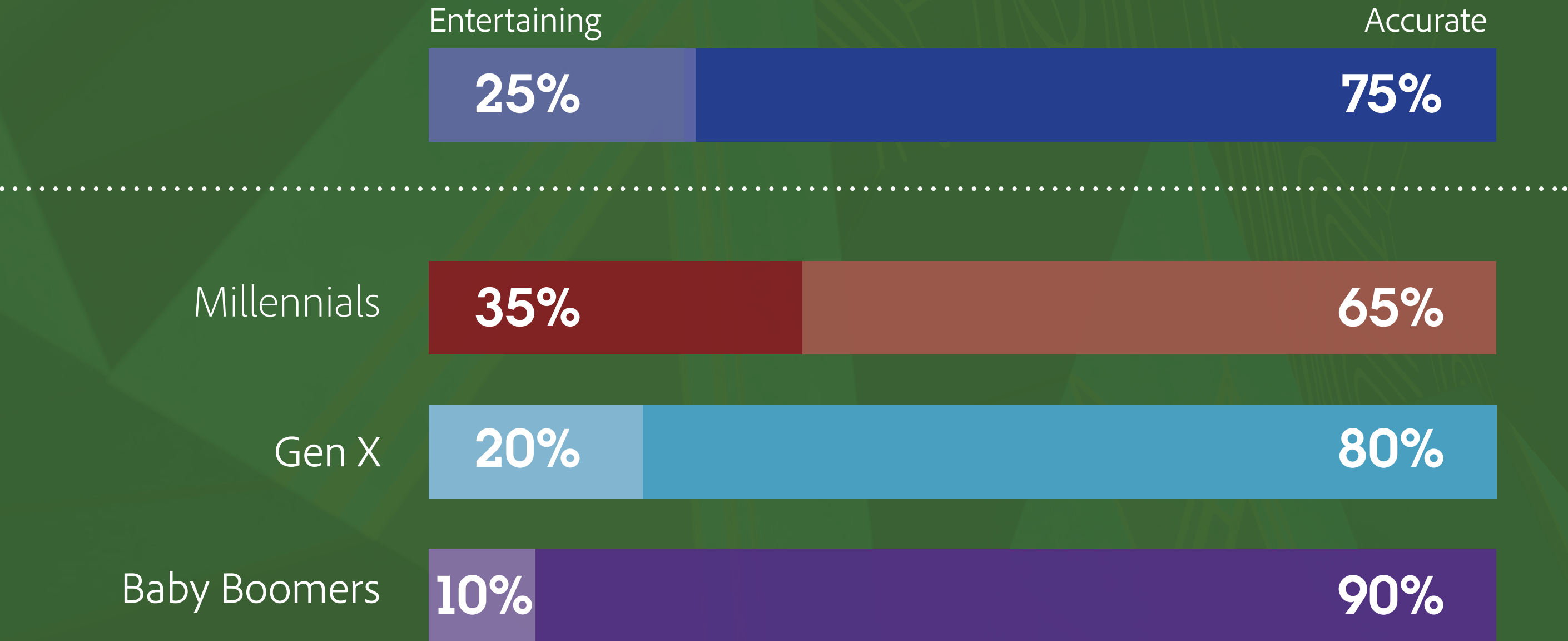
Article on breaking news



QA9. If you only had 15 minutes a day to spend consuming content, which would you rather be doing... N:1002

The entertainment factor is increasingly important to break through the noise – more so for Millennials than other generations.

Which of the following is more important to you, personally? ■ = Millennials ■ = Gen X ■ = Baby Boomers



QB5. Which of the following is more important to you personally? N: 1006; Millennials: 330, Gen X: 361, BB: 315

Millennials are also least likely to confirm that the content they share is accurate or appropriate

Online Activities (% Selecting) Among Millennials

Check that the information
I am about to post is accurate

58%

Nearly four in 10 don't
regularly fact check before
they post

Think about whether the
photo you are about to post
is appropriate for sharing

43%

Less than half think about the
appropriateness of their shared
content

Wish you could edit document,
email or post after it has been
sent or posted

37%

Post an article without reading
it all the way through

27%

With tension between accuracy and entertainment, consumers are more skeptical and likely to question the authenticity of content

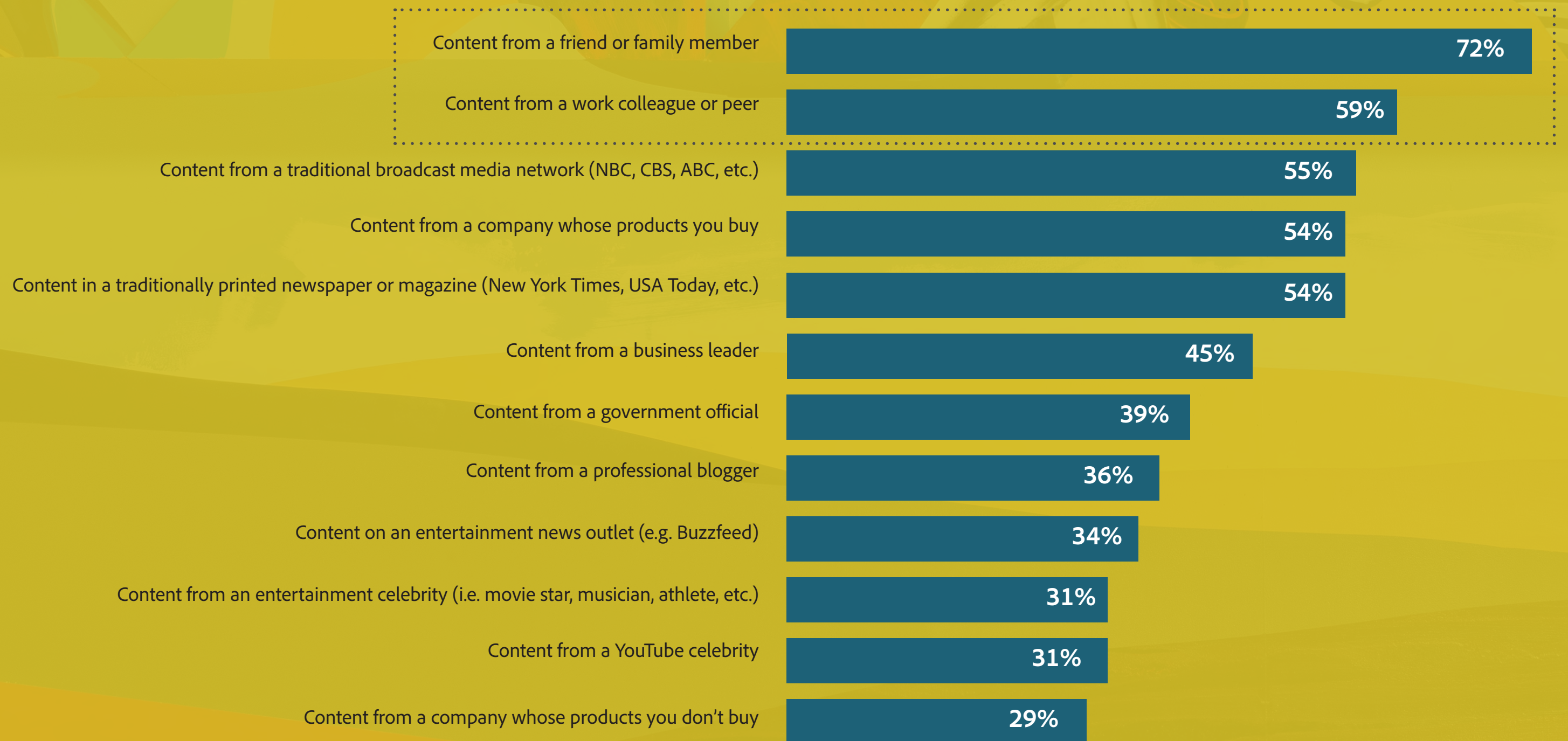
Likelihood to Question Authenticity (% Top Two Box)



QB6. When you view the following type of content online how likely are you to question its authenticity? N: 1006

Overwhelmed consumers turn to family, peers and colleagues as the most trustworthy content sources

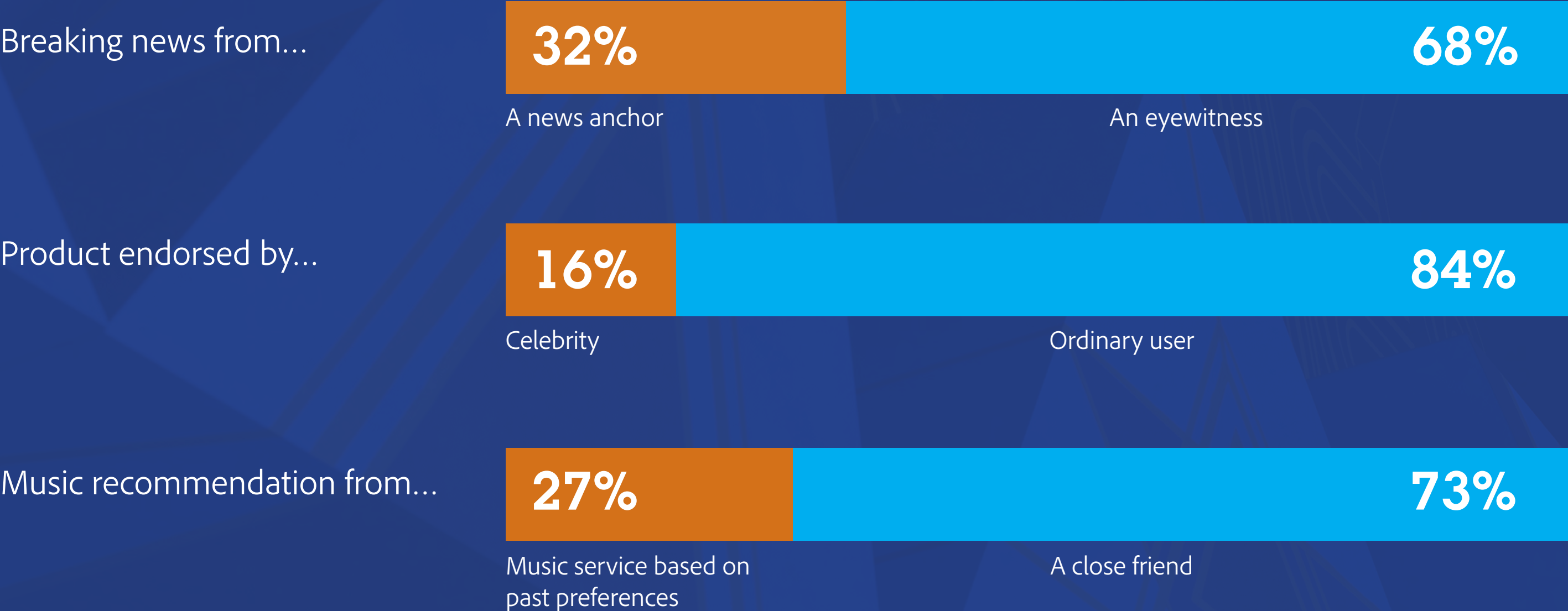
Trustworthiness of Content (% Top Two Box)



QB9. Please indicate how much you trust the following types of content, independent of who originally created it. N: 1006

Information from eyewitnesses and “people like me” are most trusted sources

Which of the following do you consider more trustworthy?



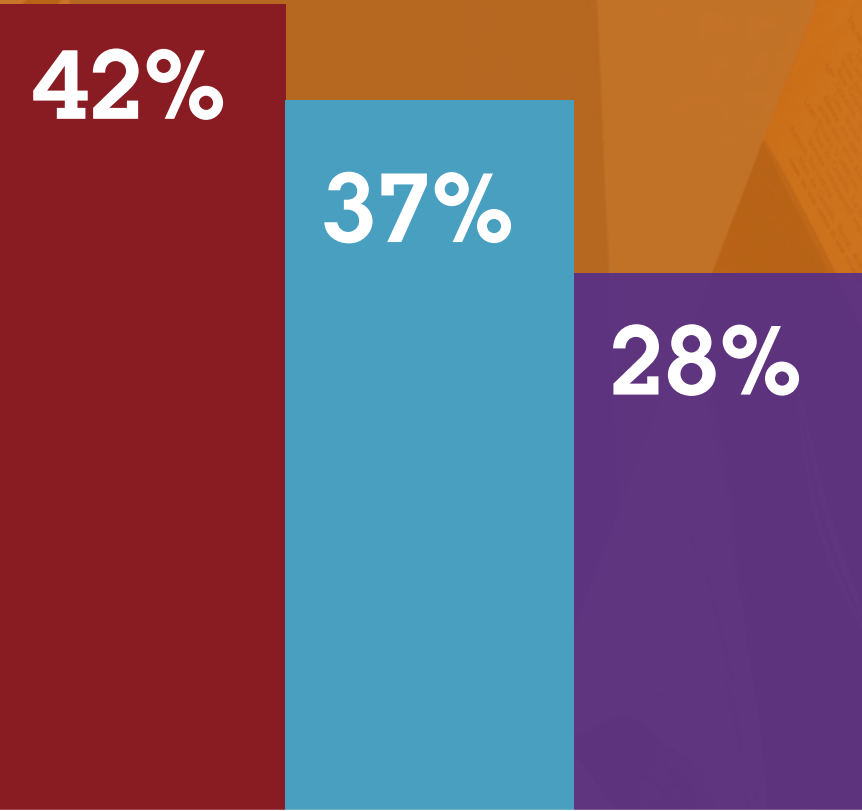
QB3. Which of the following do you consider more trustworthy? N:1006

Millennials are most likely to question the authenticity of online content, even when it's shared by a peer

Likelihood to Question Authenticity (% Top Two Box)
Among Millennials, Gen X and Baby Boomers

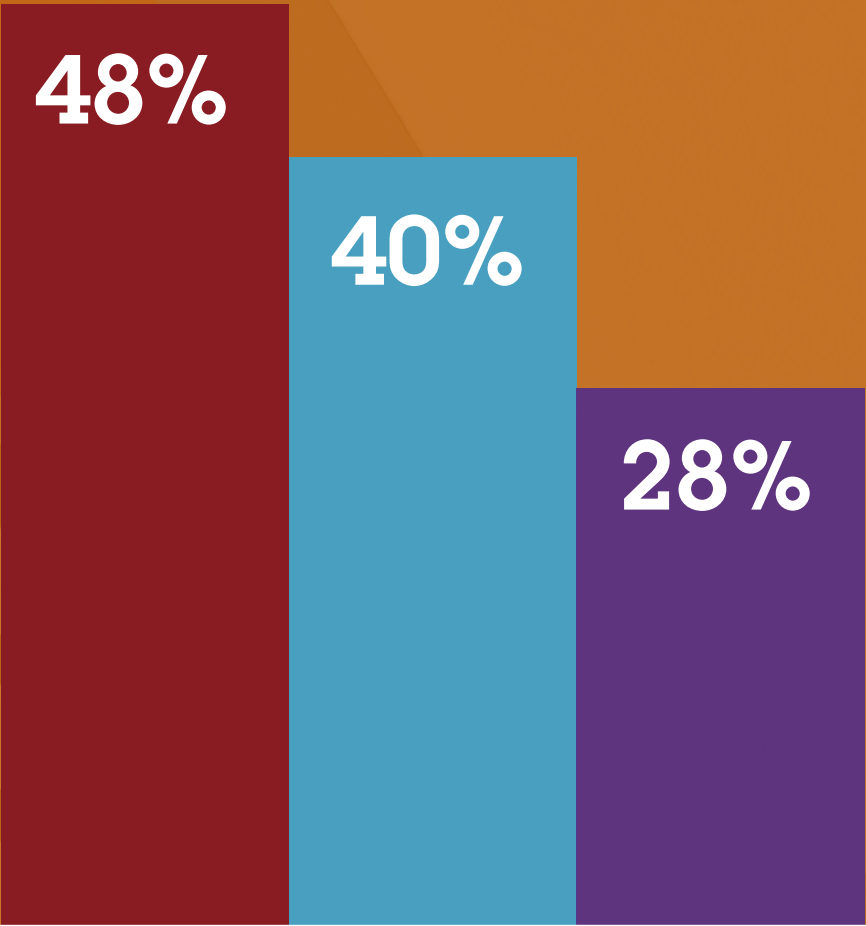
■ = Millennials ■ = Gen X ■ = Baby Boomers

Questioning whether a video has been altered



Millennials Gen X Baby Boomers

Questioning whether a photo has been altered
(photo edited; filters applied)



Millennials Gen X Baby Boomers

QB6. When you view the following type of content online how likely are you to question its authenticity? N: 1006; Millennials: 330, Gen X: 361, BB: 315

Time-starved, skeptical consumers – especially Millennials – crave content that is beautifully designed

With Only 15 Minutes to Consume Content (% Selecting)

Something Beautifully Designed

Something simple and plain

Total

66%

34%

Millennials

73%

27%

Gen X

62%

38%

Baby Boomers

55%

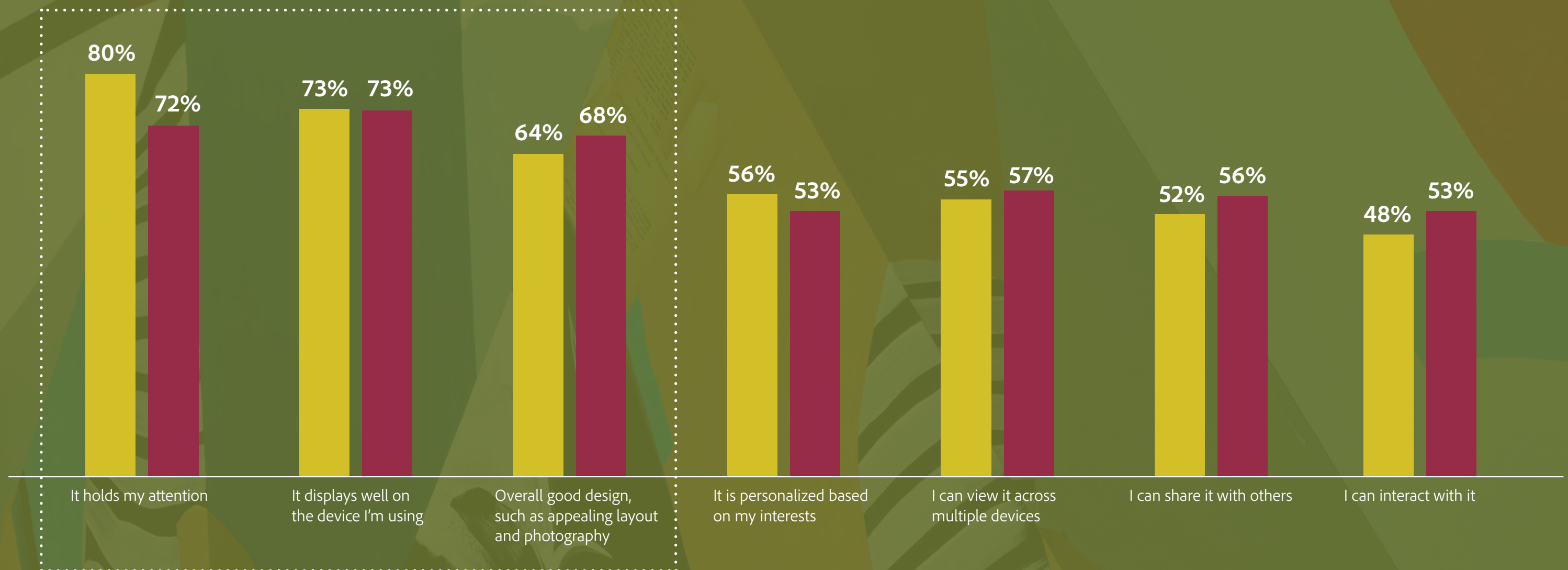
45%

QA9. If you only had 15 minutes a day to spend consuming content, which would you rather be doing... N: 1002; Millennials: 348, Gen X: 361, BB: 293

Consumers also prioritize display and design when viewing content across their personal and professional lives

Importance in Content Viewing Experience (% Selecting)

■ = Personal Life ■ = Professional Life

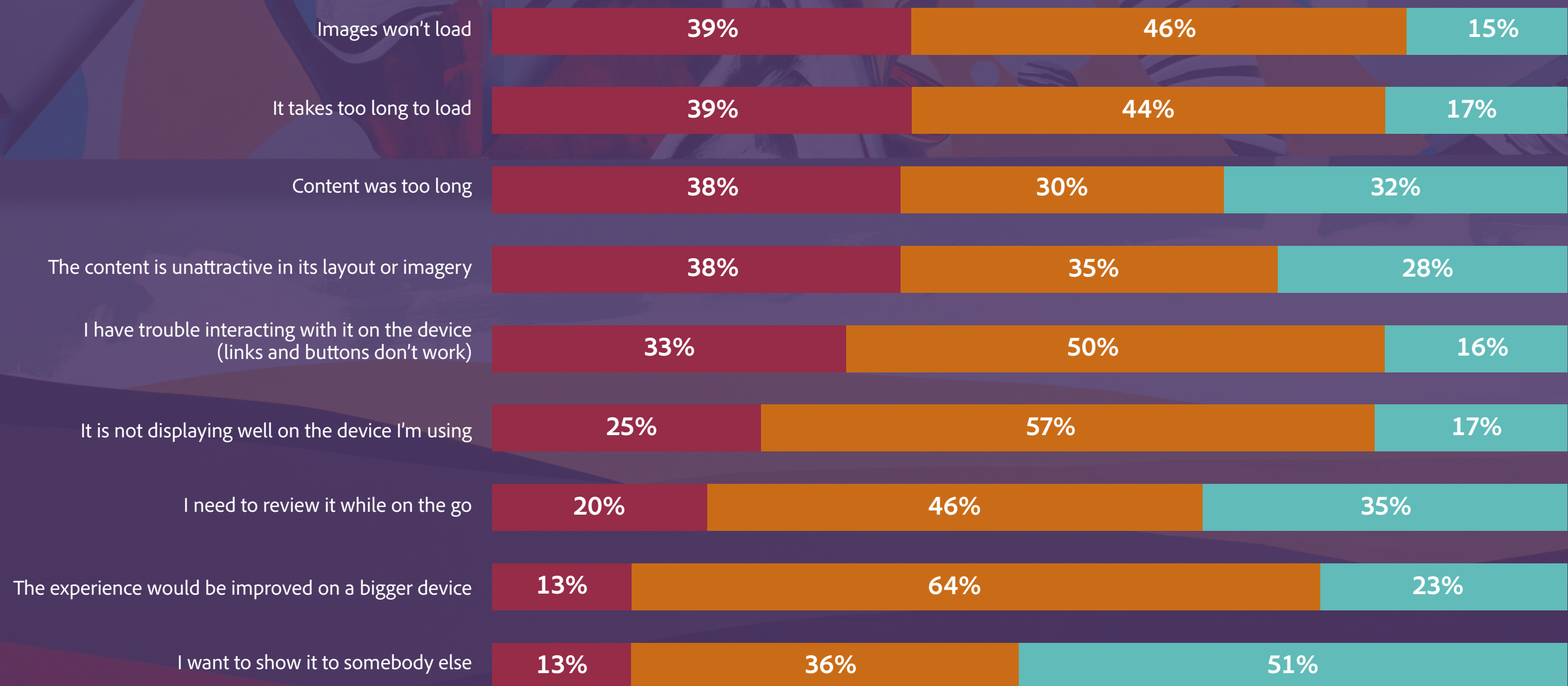


QA10. Overall, when you view content in your personal and professional life, how important is the following to your experience? N: 1002

Consumers will switch devices or stop engaging content altogether if they encounter design or display issues

Content Issue Actions (% Total)

■ = Stop engaging ■ = Switch devices ■ = Unchanged



Q2. When you are viewing content on any device, which of the following would cause you to switch to another device to view the same content or stop viewing it altogether? N:2008

The shifting content landscape has increased tensions between consumers' desire to share and create vs. connect and “unplug”

Agreement of Change Now vs. Five Years Ago

POSITIVE IMPACT

It is easier to share photos/pictures/posts with my friends and family

80%

It is easier for anybody to create content

80%

Content is more visual than it used to be

79%

It is easier to interact with my favorite companies and products

71%

NEGATIVE IMPACT

Young people spend too much time on screens as opposed to in-person interaction

78%

I feel like there is too much content out there

53%

I wish I could more frequently “unplug” from all content and devices

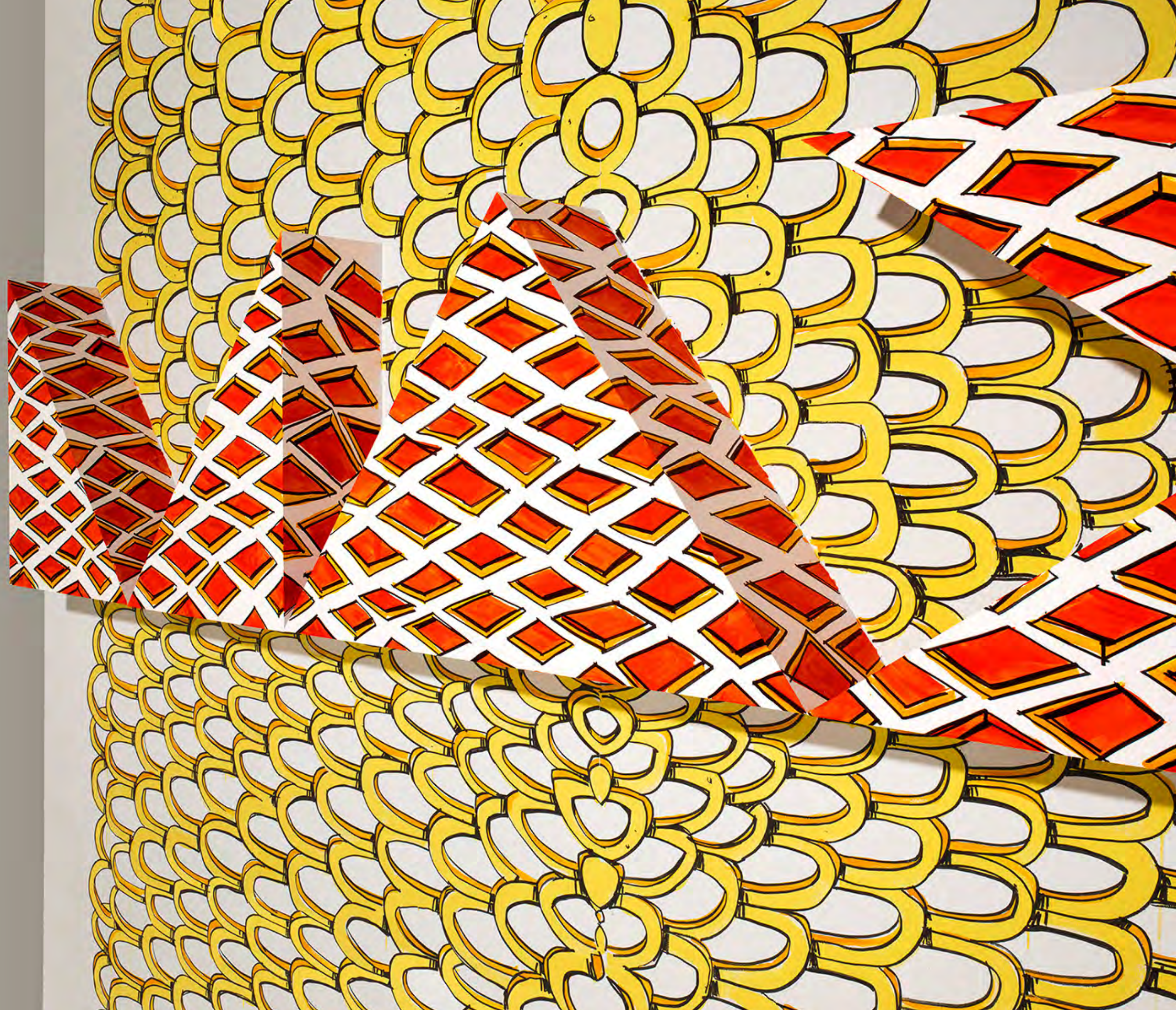
45%

It is harder to feel deeply connected to friends and family

40%

QA2. How strongly do you agree with the following statements about how things are now compared to five years ago? N: 1002

Appendix



Appendix | Devices and Services

DEVICES

A smartphone (e.g. iPhone, Galaxy, or other similar device that you could use to access the Internet or email)

A laptop/desktop computer

A tablet (e.g. iPad)

An e-reader (e.g. Kindle, etc.)

A video gaming system with access to the internet
(e.g. PlayStation, Xbox, etc.)

A home entertainment streaming device
(e.g. smart TV, DVR, AppleTV, Roku, Amazon Fire TV Stick, etc.)

A wearables device (e.g. Fitbit, Jawbone, Apple Watch, etc.)

3-D Printer

Connected home devices/appliances (e.g. refrigerators, smart thermostats)

Automated shopping devices (e.g. Amazon Dash Button)

Digital displays (e.g. at gas pump or in a taxi cab)

SERVICES

Streaming entertainment services
(e.g. Netflix, Hulu, Amazon Prime, HBO GO)

Streaming music services (e.g. Pandora, Spotify, Apple Music)

Cable/Satellite Television (e.g. Comcast, DirectTV)

Social networking sites (e.g. Facebook, LinkedIn)

Microblogging sites (e.g. Twitter)

Photo sharing platforms (e.g. Pinterest, Instagram, Snapchat)

Messaging (e.g. WhatsApp, texting)

User-generated online video platforms (e.g. YouTube, Vimeo, Periscope, Vine)

Online blogs/Forums (e.g. Reddit, Mashable, BuzzFeed)

Online news sources (e.g. CNN.com, NewYorkTimes.com)

Podcasts

Online search engines (e.g. Google, Yahoo, Bing)

Government sites (city, county, state, federal)

Email newsletters (company, membership organization)

E-commerce (e.g. Amazon, eBay)

