THE STATE OF CONTENT

RULES OF ENGAGEMENT FOR 2016

DECEMBER 2015

The State of Content: Rules of Engagement

RULE #1
Design for the Multiscreen Reality

RULE #2
Don’t Fall Victim to #TLDR (Too Long, Didn’t Read)

RULE #3
You Really Need to Lighten Up

RULE #4
In Our Relationships We Trust

RULE #5
Don’t Show Up Uninvited

STUDY METHODOLOGY

Overview

WHO?

Consumers in six countries

18+ years old

Use at least one digital device

HOW?

Two online surveys

~20 minutes per survey section

HOW MANY?

12,169

Survey A: 6,082 consumers

Survey B: 6,087 consumers

WHEN?

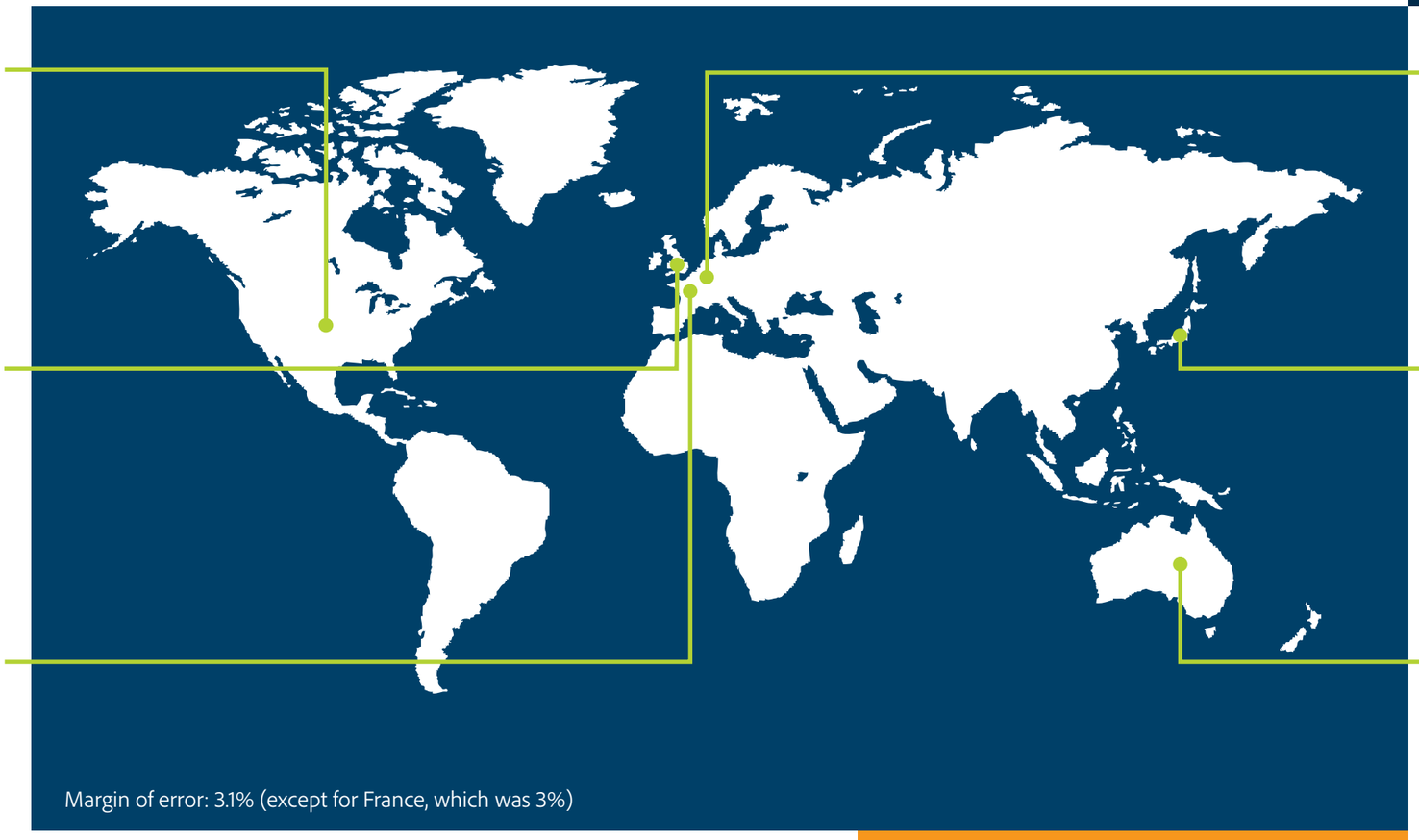
September 2015

Data collection occurred September 12 to 29.

Margin of error (total sample) = +/- 0.89
MOE (Survey A) = +/- 1.26 MOE (Survey B) = +/- 1.26

STUDY METHODOLOGY

Country details



U.S.A.
N: 2,008
Survey A: 1,009
Survey B: 999

U.K.
N: 2,007
Survey A: 1,000
Survey B: 1,007

FRANCE
N: 2,114
Survey A: 1,055
Survey B: 1,059

GERMANY
N: 2,010
Survey A: 1,001
Survey B: 1,009

JAPAN
N: 2,014
Survey A: 973
Survey B: 1,041

AUSTRALIA
N: 2,016
Survey A: 1,002
Survey B: 1,014

KEY TAKEAWAYS:

The State of Content: Rules of Engagement

Key takeaways

RULE #1:

DESIGN FOR THE MULTISCREEN REALITY

Consumers are multiscreening more than ever before—optimize your content for it

- On average, 83 percent of global consumers report they multiscreen, using 2.23 devices at the same time. **(PAGE 11)**
- While the majority of consumers report feeling good about multiscreening (81% entertained, 80% connected, 76% productive), nearly half (47%) say they are distracted by multiscreening. **(PAGE 12)**
- As attention spans shrink, 59 percent of consumers globally would rather engage with content that's beautifully designed than simple—even when short on time. **(PAGE 14)**
- Consumers ranked display (65%) as the most important aspect when it comes to content experience in their personal life, and 54 percent listed overall good design, such as appealing layout and photography as important. **(PAGE 15)**

RULE #2:

DON'T FALL VICTIM TO #TLDR

Consumers' higher expectations = lower patience for sub-par experiences

- Eighty-nine percent of digital device users would switch devices or stop viewing altogether when encountering content that fails to meet their expectations. **(PAGE 17)**
- Sixty-seven percent of consumers would stop engaging if content is too long. **(PAGE 17)**
- Nearly 8 in 10 would do the same if the content doesn't display well on their device. **(PAGE 17)**
- More than half of consumers (57%) would prefer to watch videos on breaking news vs. read an article and 63 percent would rather skim several short stories than read deeper articles. **(PAGE 18)**

Key takeaways

RULE #3:

YOU REALLY NEED TO LIGHTEN UP

Entertainment and humor can help brands connect

- Seventy percent of global consumers agree that humor makes companies more relatable, but just 14 percent rate company created content as entertaining. **(PAGE 20)**
- Almost one in three (29%) globally believe that content that entertains is more important than content that is accurate. Entertainment is particularly valued in France, where 42 percent believe it's more important than being accurate. **(PAGE 21)**
- Globally, "making people laugh" was identified as the top personal motivator for sharing content. **(PAGE 22)**

Key takeaways

RULE #4:
IN OUR RELATIONSHIPS WE TRUST

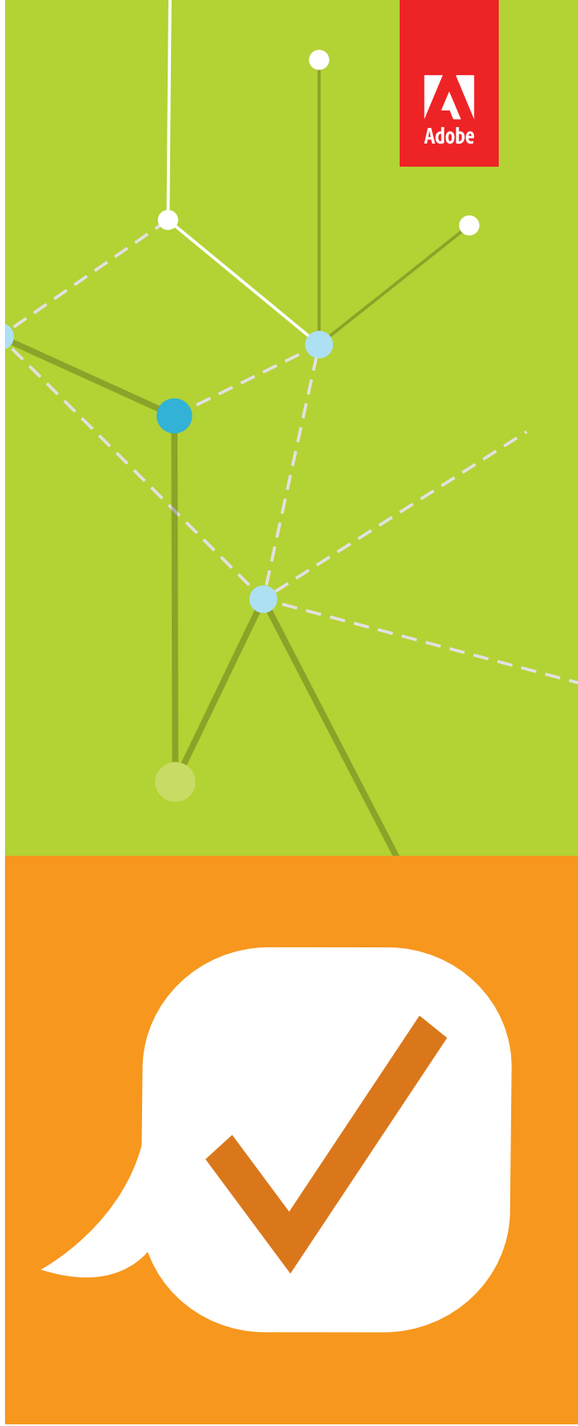
In an era of high skepticism, tapping into trusted relationships is critical.

- Consumers are highly skeptical of most content they view online: half of consumers (50%) question whether negative comments or reviews have been removed, 49 percent wonder if an author was paid/incented to write a positive review and 48 percent question whether a news article is biased. **(PAGE 24)**
- Eighty-one percent consider a product endorsed by an ordinary user more trustworthy than one endorsed by a celebrity. **(PAGE 25)**
- Consumer trust in content increases as their relationship with the source grows stronger—even for brands. Only 23 percent of consumers trust content from companies whose products they don't buy, but if the source is a company from whom they do purchase products and have a relationship, that number nearly doubles to 43 percent. **(PAGE 26)**
- People are also most likely to share content when it comes from a source they're close to, such as a friend or family member (65%) or a colleague (36%). **(PAGE 27)**

RULE #5:
DON'T SHOW UP UNINVITED

Consumers are willing to share information, but expect return on value

- Seventy-three percent say they are open to suggestions or predictive recommendations from brands, based on their past behavior. **(PAGE 29)**
- Three quarters (75%) of digital device users are willing to share at least one piece of information to improve content recommendations from brands. **(PAGE 31)**
- Of those consumers not willing to share information about themselves, 40 percent believe companies could do something to ease their concern and 25 percent suggested "asking permission to access data" would make them more comfortable. **(PAGE 33)**



RULE #1

Design for the Multiscreen Reality

CONSUMERS ARE MULTISCREENING MORE THAN EVER BEFORE—OPTIMIZE YOUR CONTENT FOR IT

RULE #1

Design for the
Multiscreen Reality

Consumers are constantly plugged in, using multiple devices and services

Device usage

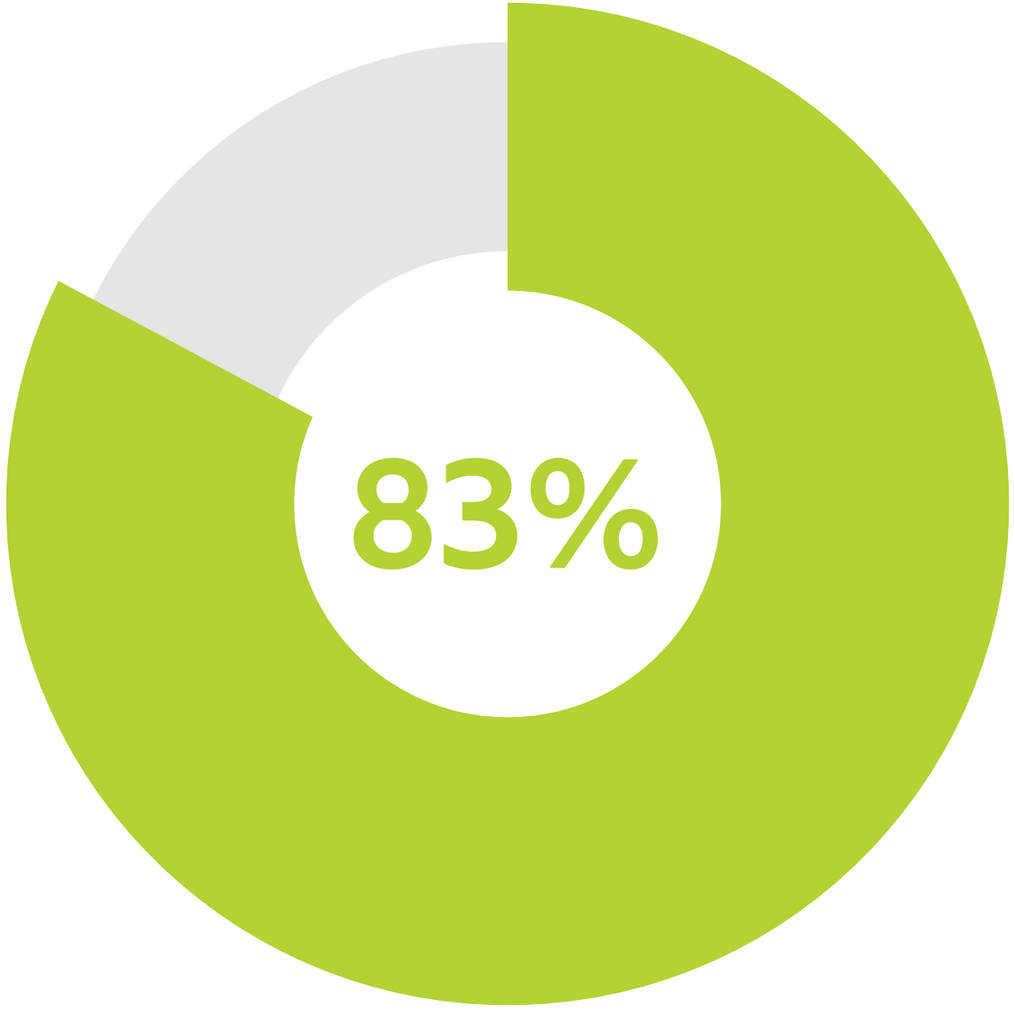
(Summary of the average number of devices and services)

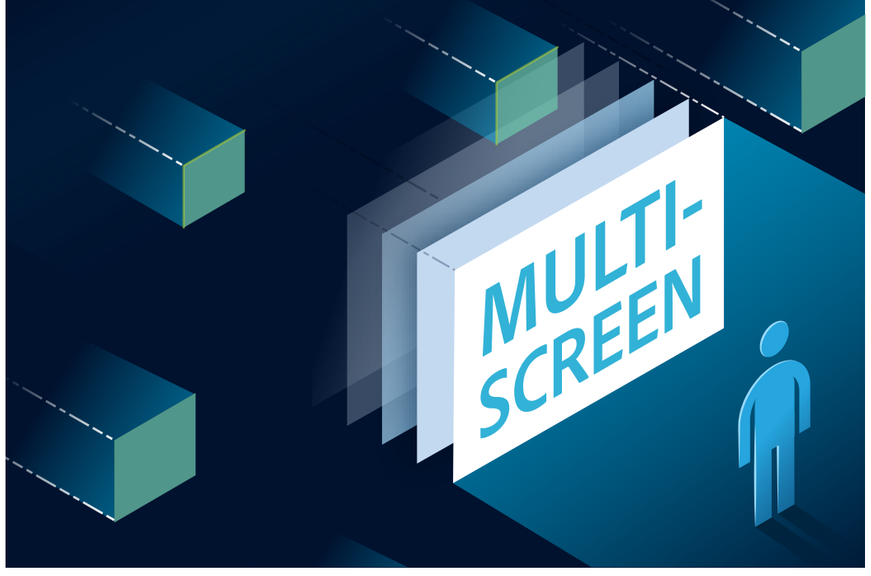
	U.S.	U.K.	AUS	FRA	GER	JAP
Devices	6	5	5	5	5	2
Services	12	11	11	10	11	6

Globally, consumers use an average of 5 devices and 10 services

S4: How frequently, if ever, do you use each of the following devices? Mean of devices/services selected shown.
*Average numbers are not rounded for consistency purposes
**Full list of Devices and Services in Appendix
GLOBAL: 12169, US: 2008, UK: 2007, AUS: 2016, FR: 2114, DE: 2010, JP: 2014

NUMBER OF DEVICES USED SIMULTANEOUSLY (% SELECTING)





RULE #1

Design for the Multiscreen Reality

Globally, device users multiscreen

Consumers use, on average, **2.23 devices** at the **same time**

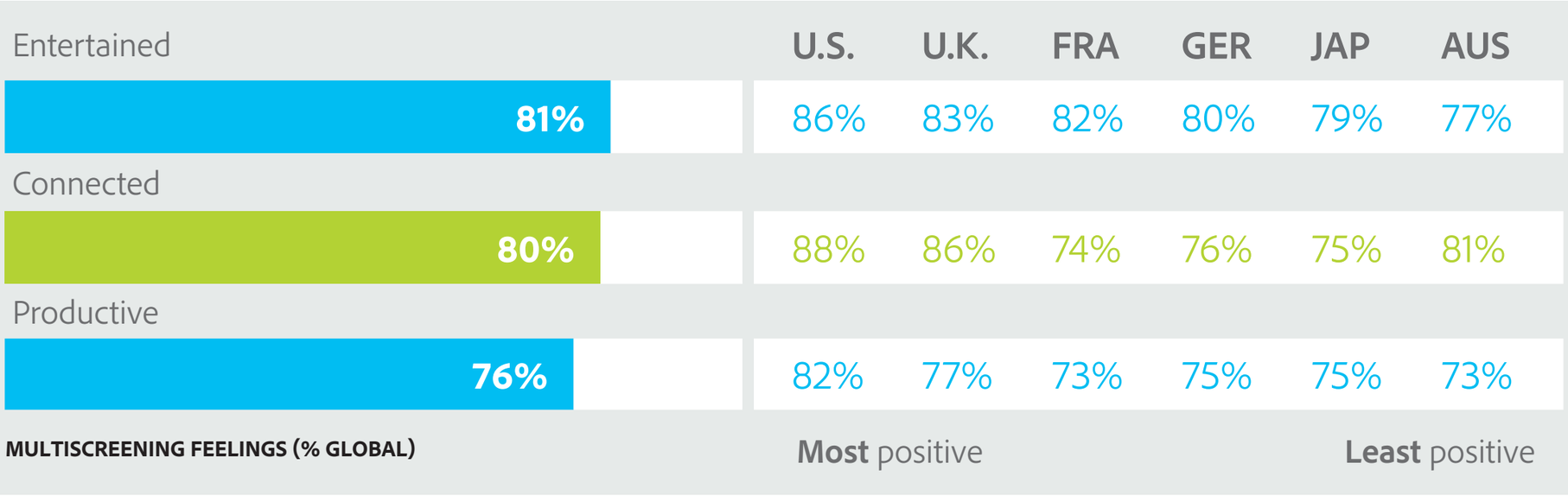
U.S.	FRA	U.K.	GER	AUS	JAP
2.42	2.34	2.31	2.29	2.18	1.84

Q3. Which of your devices do you regularly use at the same time?
GLOBAL: 12169, US: 2008, UK: 2007, AUS: 2016, FR: 2114, DE: 2010, JP: 2014

RULE #1

Design for the Multiscreen Reality

People have positive feelings towards multiscreening



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?
GLOBAL: 12169, US: 2008, UK: 2007, AUS: 2016, FR: 2114, DE: 2010, JP: 2014

Yet, almost half of global device users admit feeling distracted by multiscreening

RULE #1

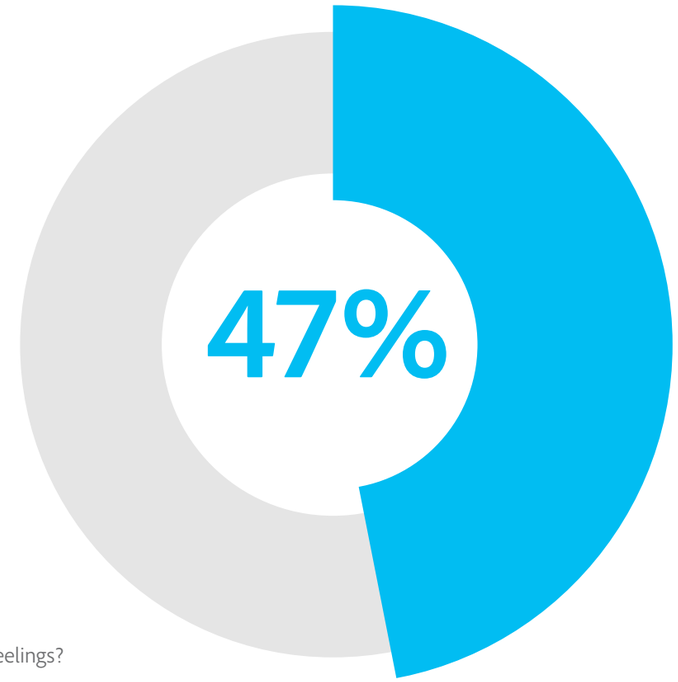
Design for the Multiscreen Reality

MULTISCREENING FEELINGS (% GLOBAL)

AUS	JAP	U.K.	GER	FRA	U.S.
52%	50%	50%	49%	40%	40%

Most distracted — **Least** distracted

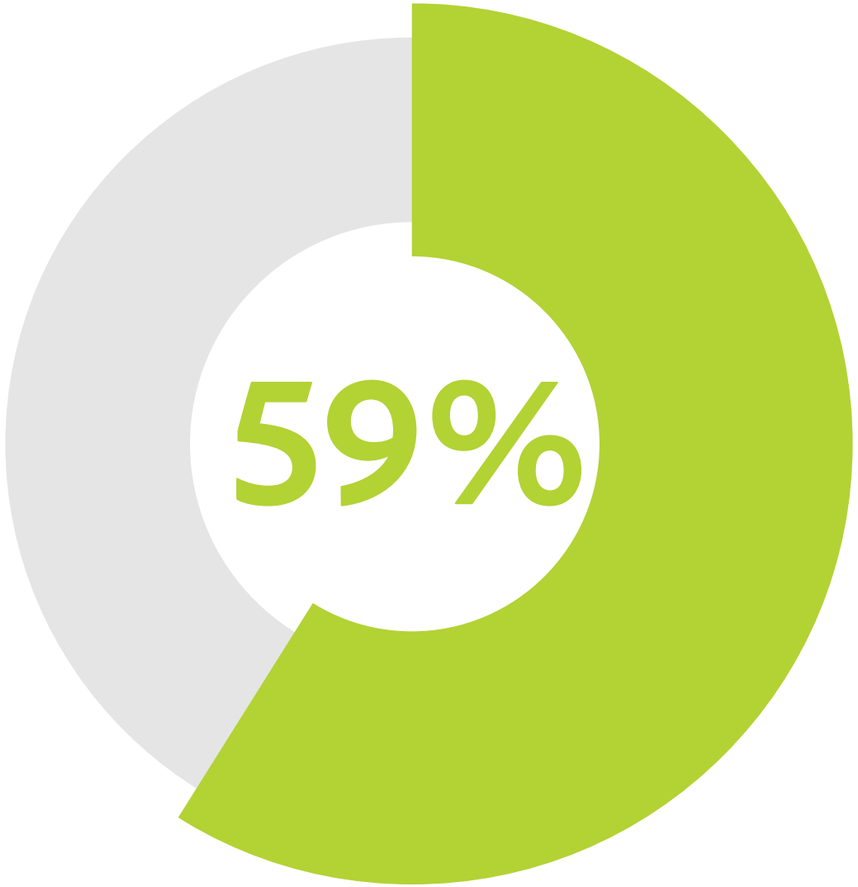
Millennial	Gen X	55+
50%	44%	44%



Q5. When you think about how you feel while you are using multiple screens at the same time, which f each pair best describes your feelings?
GLOBAL: 12169, US: 2008, UK: 2007,a AUS: 2016, FR: 2114, DE: 2010, JP: 2014

Even when short on time, consumers prefer beautifully designed content

15 MINUTES TO CONSUME CONTENT (% GLOBAL)



Prefer consuming content that is beautifully designed rather than simple when they have only 15 minutes to spare

U.S.	FRA	AUS	GER	U.K.	JAP
66%	62%	61%	59%	58%	49%

RULE #1

Design for the Multiscreen Reality

QA9. If you only had 15 minutes a day to spend consuming content, which would you rather be doing...
GLOBAL: 6040, US: 1009, UK: 1000, AUS: 1002, FR: 1055, DE: 1001, JP: 973

RULE #1

Design for the
Multiscreen Reality

Display and design are critical

QA10. Overall, when you view content in your personal and professional life, how important is the following to your experience? GLOBAL: 6040, US: 1009, UK: 1000, AUS: 1002, FR: 1055, DE: 1001, JP: 973

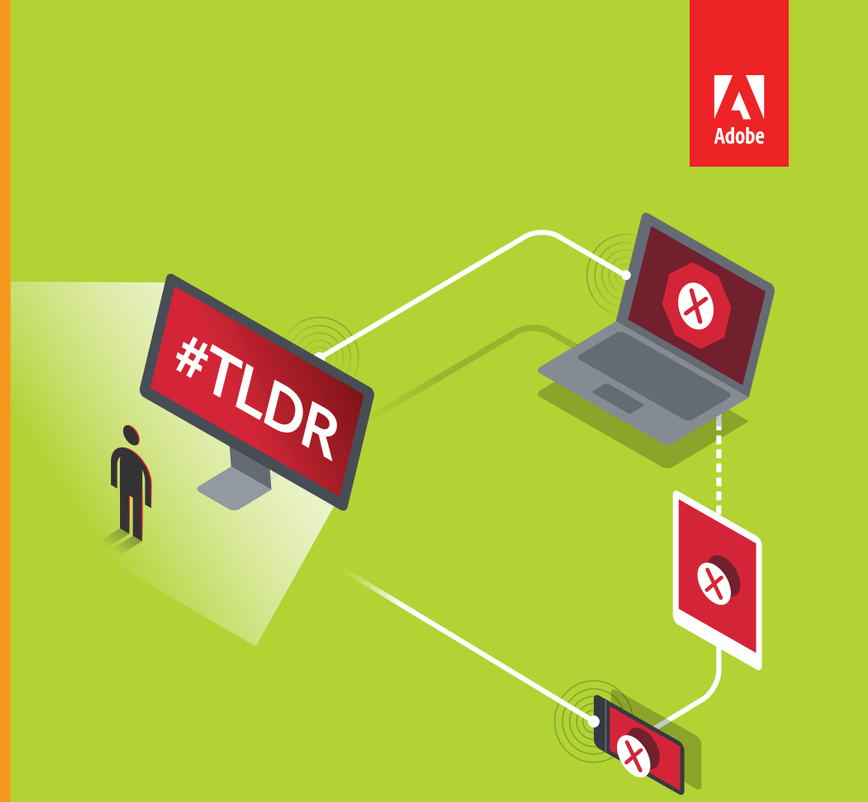
IMPORTANCE IN CONTENT VIEWING EXPERIENCE FOR PERSONAL LIFE (% GLOBAL; TOP TWO BOX)

	GLOBAL	U.S.	U.K.	AUS	FRA	GER	JAP
It displays well on the device I'm using	65%	73%	72%	68%	65%	63%	50%
It holds my attention	64%	80%	75%	68%	60%	53%	45%
Overall good design, such as appealing layout and photography	54%	64%	59%	58%	56%	46%	39%
It is personalized based on my interests	49%	56%	47%	47%	48%	56%	36%
I can view it across multiple devices	45%	55%	48%	46%	41%	44%	35%

RULE #2

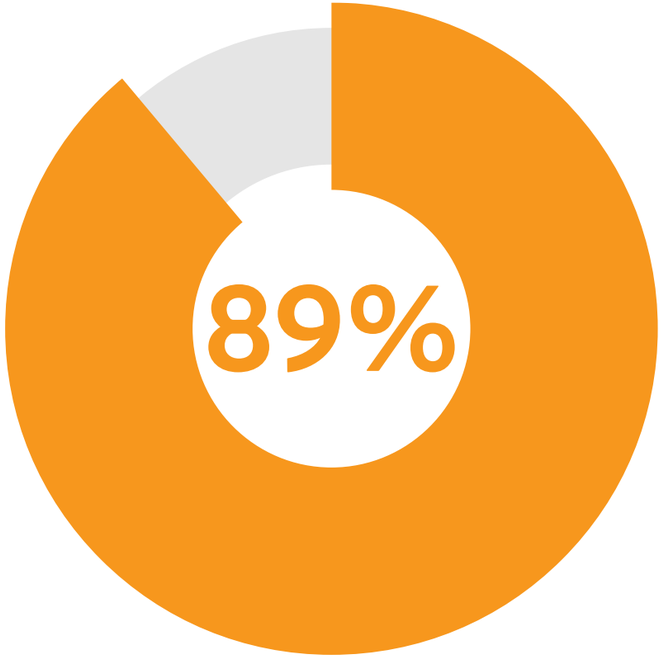
Don’t Fall Victim to #TDLR (Too Long, Didn’t Read)

CONSUMERS’ HIGHER EXPECTATIONS = LOWER PATIENCE FOR SUB-PAR EXPERIENCES



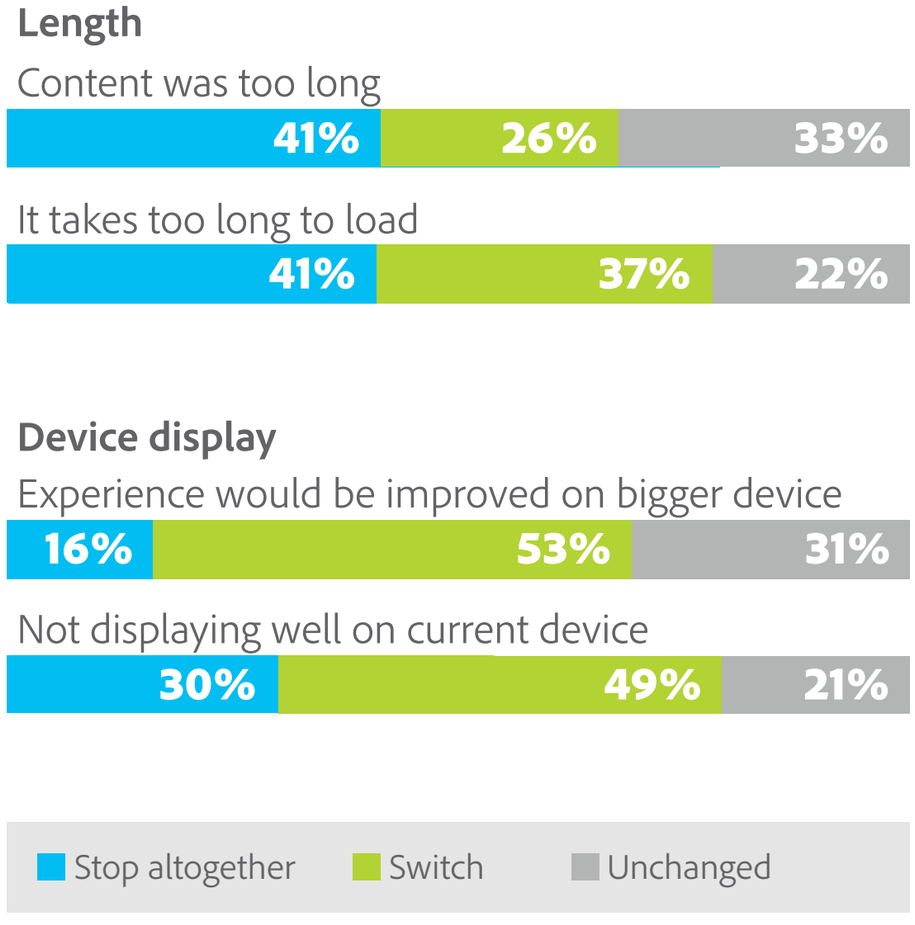
Consumers have little patience for a sub-par content experience

ACTIONS AS A RESULT OF CONTENT ISSUES (% GLOBAL)



Of digital device users would switch devices or stop viewing altogether when coming across issues with content

GER	U.S.	FRA	AUS	U.K.	JAP
92%	92%	92%	90%	89%	80%



RULE #2

Don't Fall Victim to #TLDR

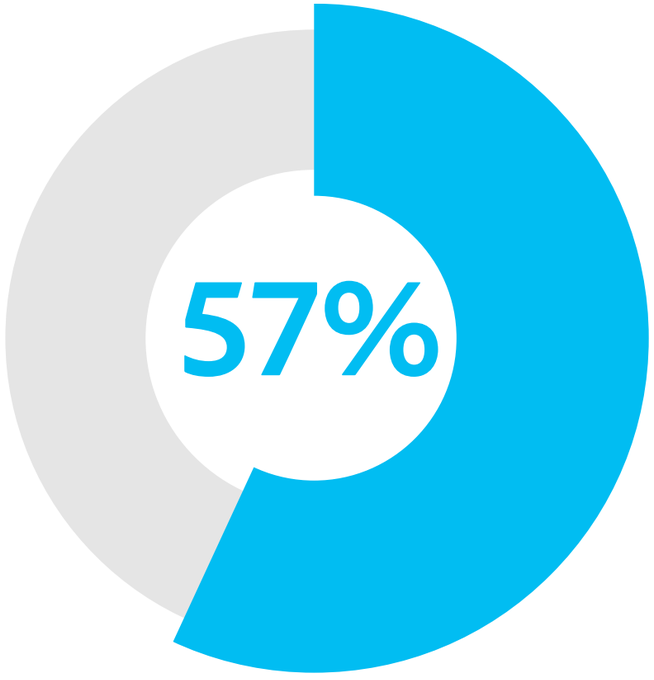
Q2. When you are viewing content on any device, which of the following would cause you to switch to another device to view the same content or stop viewing it altogether?
GLOBAL: 12169, US: 2008, UK: 2007, AUS: 2016, FR: 2114, DE: 2009, JP: 2014

RULE #2

Don't Fall Victim to #TLDR

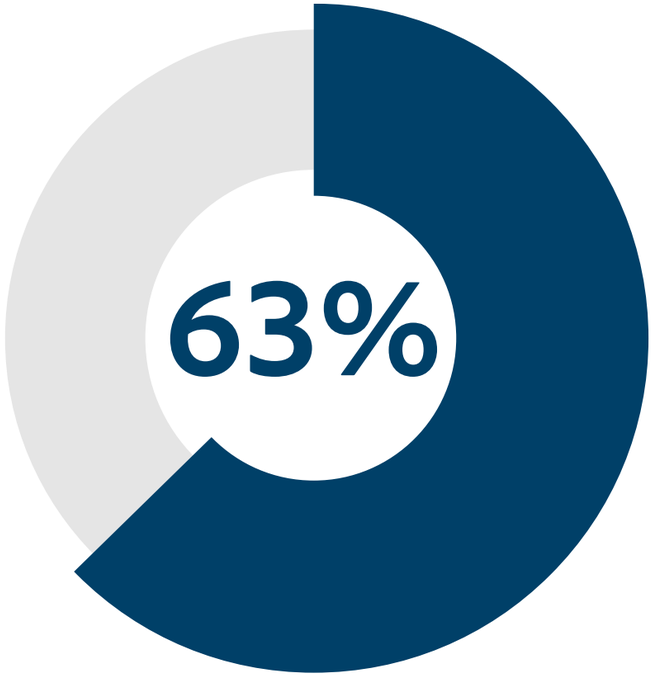
QA9. If you only had 15 minutes a day to spend consuming content, which would you rather be doing...
GLOBAL: 6040, US: 1009, UK: 1000, AUS: 1002, FR: 1055, DE: 1001, JP: 973

15 MINUTES TO CONSUME CONTENT (% GLOBAL)



Prefer watching videos on breaking news over reading an article

U.S.	AUS	U.K.	GER	FRA	JAP
66%	66%	64%	61%	51%	35%



Prefer skimming short stories on trends over deeper, longer articles

JAP	AUS	GER	U.K.	U.S.	FRA
79%	65%	61%	59%	59%	58%

With limited time people opt for videos over text and shorter stories over long articles

RULE #3

You Really Need to Lighten Up

ENTERTAINMENT AND HUMOR CAN HELP BRANDS CONNECT

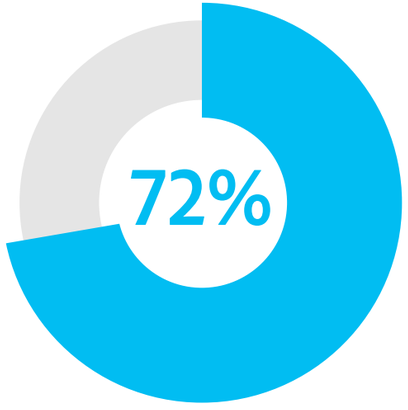
RULE #3

You Really Need to Lighten Up

Humor, consistency, and polish can help brands connect

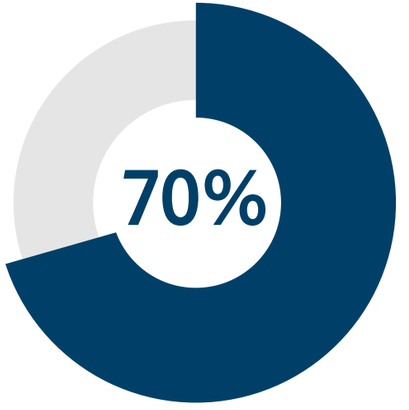
QB7. Which is closer to your opinion?
QB11. What is your general opinion of the following forms on company communication?
GLOBAL: 6129, US: 999, UK: 1007, AUS: 1014, FR: 1059, DE: 1009, JP: 1041

OPINIONS ON COMPANY ACTIONS (% GLOBAL)



I prefer when companies select a few channels to communicate with customers and do it well

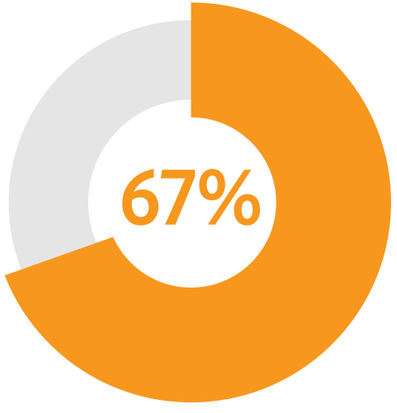
U.K.	AUS	U.S.	GER	FRA	JAP
76%	76%	75%	73%	67%	66%



When companies are funny, it helps them be more relatable

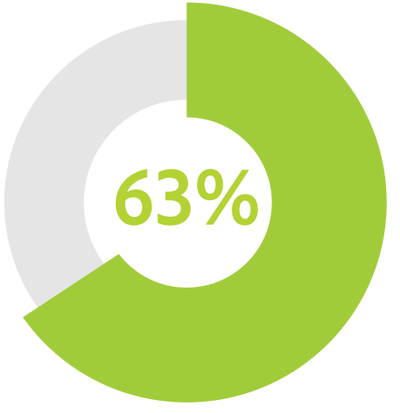
(Yet only **14%** *believe company-created content is entertaining)*

U.S.	JAP	AUS	U.K.	FRA	GER
75%	73%	72%	71%	63%	63%



Companies should focus on what they are unqiuely good at to be authentic

U.K.	AUS	U.S.	FRA	GER	JAP
75%	75%	73%	71%	67%	45%



If I am going to follow a company's content, I would prefer to see more polished, curated content

GER	U.K.	JAP	FRA	AUS	U.S.
72%	62%	65%	62%	61%	50%

Consumers value entertaining content

RULE #3

You Really Need to Lighten Up

WHICH OF THE FOLLOWING IS MORE IMPORTANT TO YOU, PERSONALLY? (% GLOBAL)

29%

Believe content that is **entertaining** is more important to them than accuracy.

ENTERTAINMENT IS PARTICULARLY VALUED IN FRANCE.

FRA	GER	AUS	U.K.	U.S.	JAP
42%	29%	26%	25%	25%	24%

ROLE OF CONTENT IN LIFE (% GLOBAL)

67%

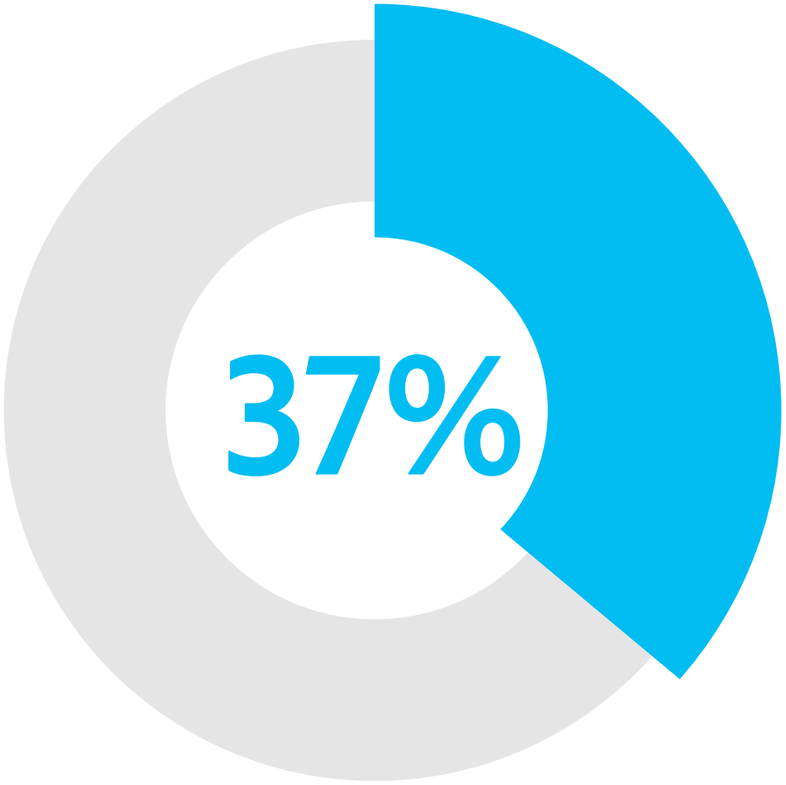
Believe that content plays an **entertaining** role in their life.

U.S.	FRA	GER	AUS	U.K.	JAP
71%	71%	68%	67%	65%	61%

QB5. Which of the following is more important to you personally?
GLOBAL: 6129, US: 999, UK: 1007, AUS: 1014, FR: 1059, DE: 1009, JP: 1041

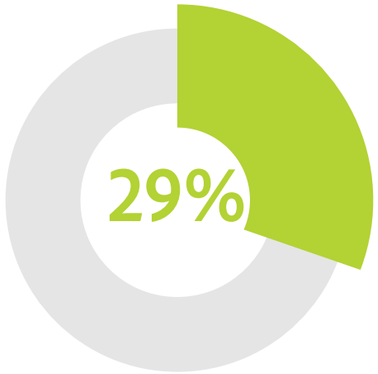
QA6. How would you describe the role of content in your life?
GLOBAL: 6040, US: 1009, UK: 1000, AUS: 1002, FR: 1055, DE: 1001, JP: 973

MOTIVATIONS FOR SHARING EXTERNAL CONTENT (% GLOBAL)

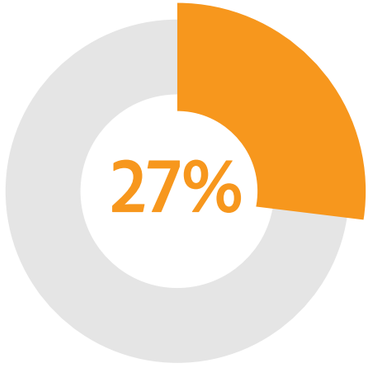


To make people laugh

U.S.	AUS	GER	U.K.	FRA	JAP
43%	40%	39%	39%	35%	22%



To raise awareness on a particular issue



To show friends content I think they will enjoy

RULE #3

You Really Need to Lighten Up

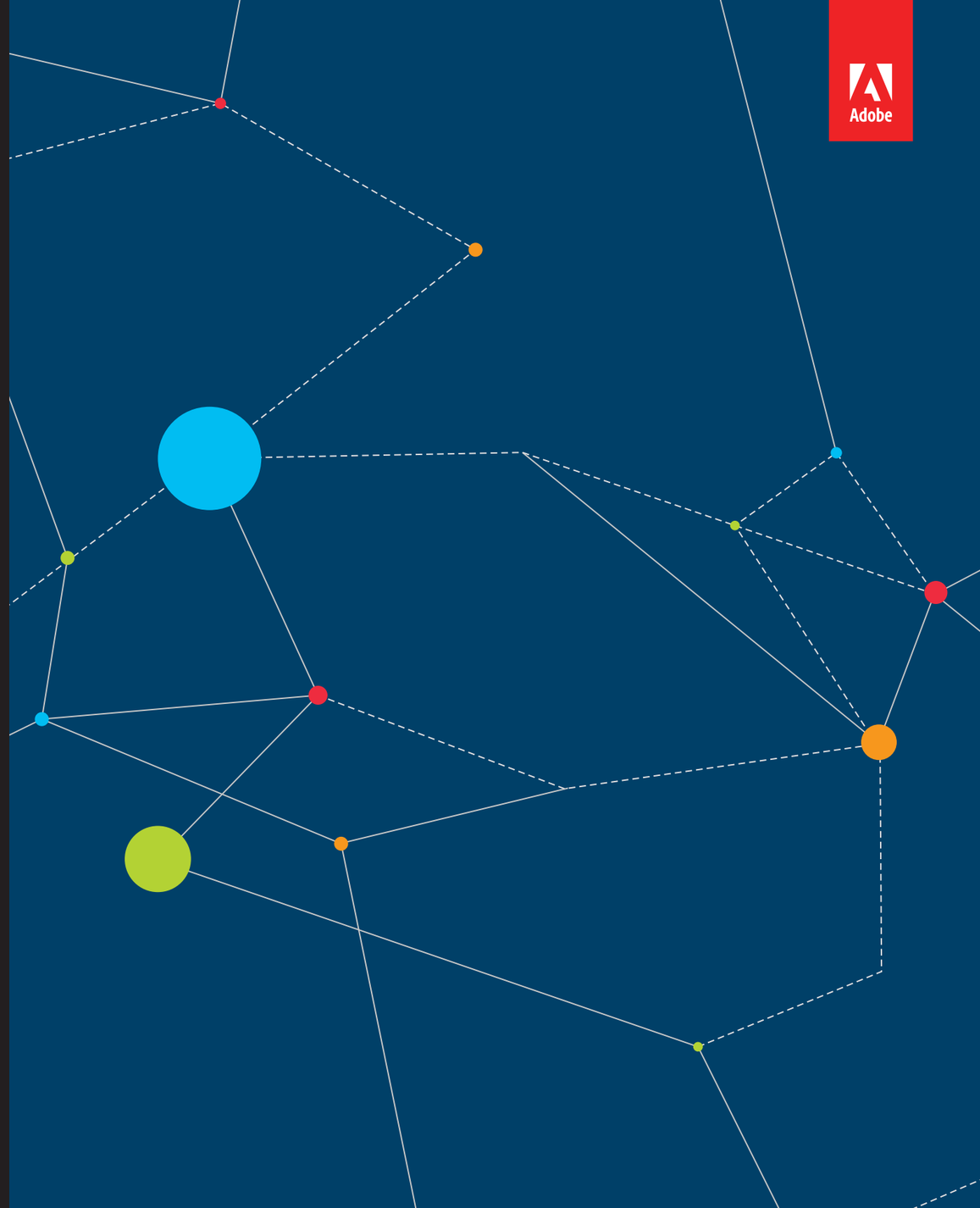
Making people laugh is the top motivation for sharing content

QB18. When you share the following types of content, what are your motivations? Please select all that apply. GLOBAL: 6129, US: 999, UK: 1007, AUS: 1014, FR: 1059, DE: 1009, JP: 1041

RULE #4

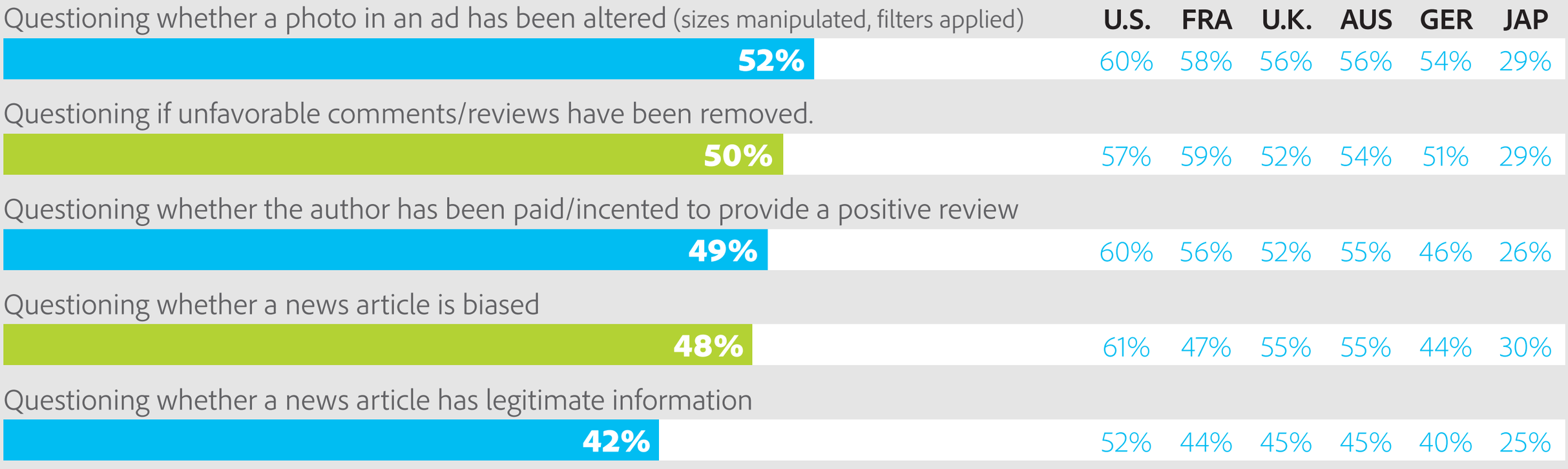
In Our Relationships We Trust

IN AN ERA OF HIGH SKEPTICISM, TAPPING INTO TRUSTED RELATIONSHIPS IS CRITICAL



Consumers are likely to be skeptical of online content

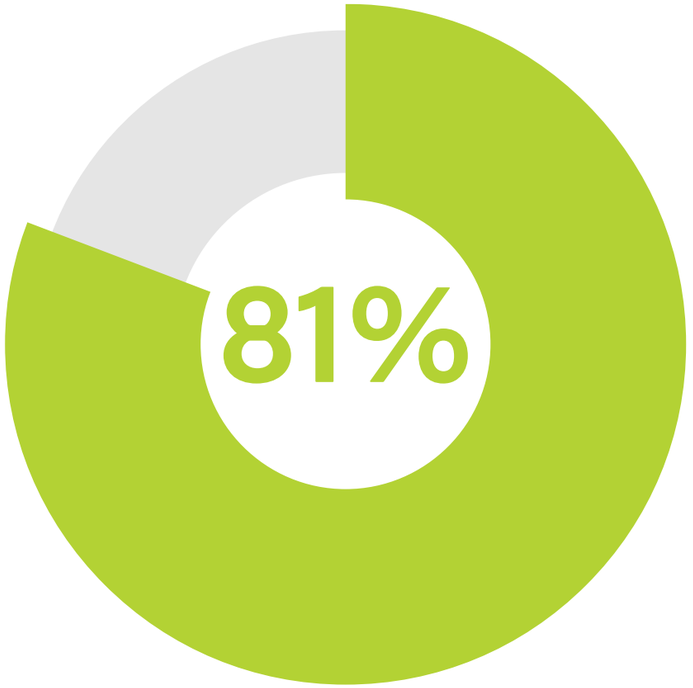
LIKELIHOOD TO QUESTION AUTHENTICITY (% GLOBAL, TOP TWO BOX)



	U.S.	FRA	U.K.	AUS	GER	JAP
Questioning whether a photo in an ad has been altered (sizes manipulated, filters applied)	60%	58%	56%	56%	54%	29%
Questioning if unfavorable comments/reviews have been removed.	57%	59%	52%	54%	51%	29%
Questioning whether the author has been paid/incented to provide a positive review	60%	56%	52%	55%	46%	26%
Questioning whether a news article is biased	61%	47%	55%	55%	44%	30%
Questioning whether a news article has legitimate information	52%	44%	45%	45%	40%	25%

QB6. When you view the following type of content online how likely are you to question its authenticity?
GLOBAL: 6129, US: 999, UK: 1007, AUS: 1014, FR: 1059, DE: 1009, JP: 1041

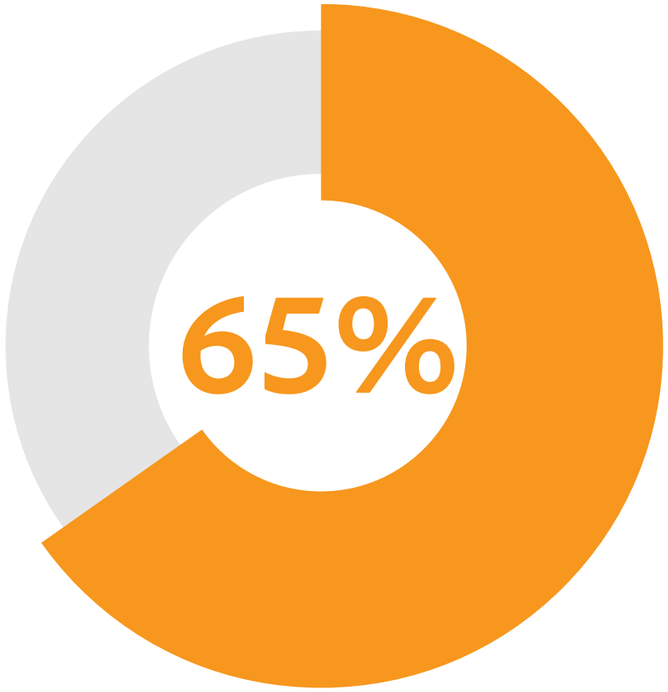
TRUSTWORTHINESS OF CONTENT (% GLOBAL)



Consider a product endorsed by an ordinary user more trustworthy than one endorsed by a celebrity

U.S.	U.K.	GER	AUS	FRA	JAP
84%	84%	83%	81%	80%	72%

QB3. Which of the following would you consider to be more trustworthy? GLOBAL: 6129, US: 999, UK: 1007, AUS: 1014, FR: 1059, DE: 1009, JP: 1041



Consider breaking news from an eyewitness more trustworthy than from a news anchor

FRA	AUS	U.S.	U.K.	GER	JAP
74%	68%	68%	66%	65%	48%

RULE #4

In Our Relationships We Trust

People show a lack of trust in potentially biased sources

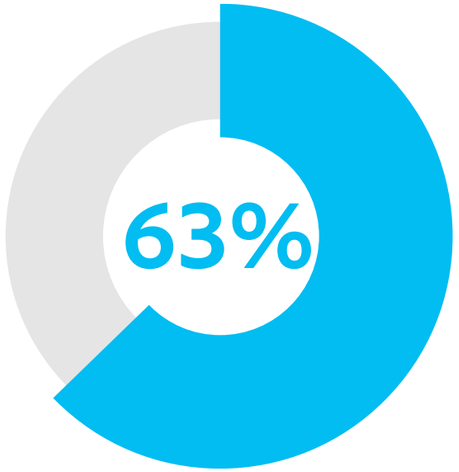
RULE #4

In Our Relationships We Trust

QB9. Please indicate how much you trust the following types of content, independent of who originally created it. [Top 2 box] GLOBAL: 6129, US: 999, UK: 1007, AUS: 1014, FR: 1059, DE: 1009, JP: 1041

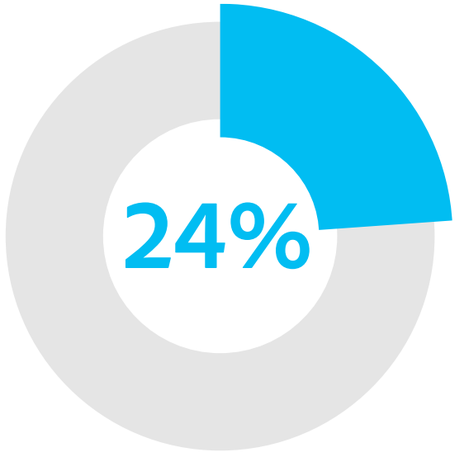
People trust those they're closest to and companies they know

TRUSTWORTHINESS OF CONTENT (% GLOBAL, TOP TWO BOX)



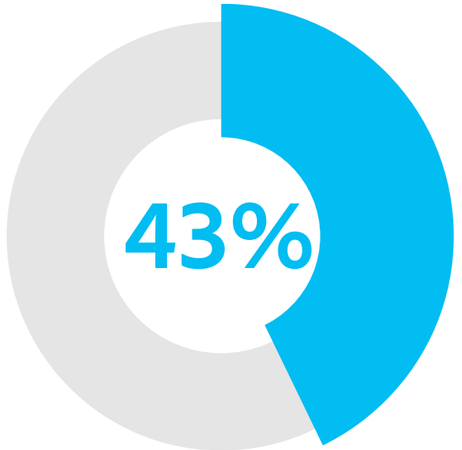
Trust content from a friend or family member

U.S.	U.K.	GER
72%	70%	65%
FRA	**AUS**	**JAP**
64%	64%	42%



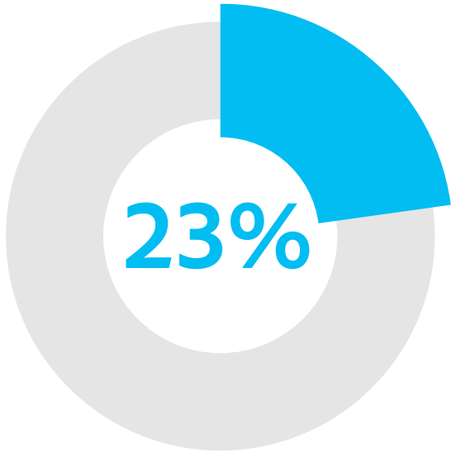
Trust content from a YouTube celebrity

U.S.	GER	FRA
31%	28%	27%
AUS	**U.K.**	**JAP**
23%	22%	16%



Trust content from a company whose products they *DO* buy

U.S.	U.K.	FRA
54%	46%	44%
AUS	**GER**	**JAP**
44%	41%	30%



Trust content from a company whose products they *DON'T* buy

U.S.	FRA	GER
29%	27%	23%
U.K.	**AUS**	**JAP**
23%	22%	15%

We share content from those we're closest to

CONTENT MOST LIKELY TO SHARE (% SELECTING)

CONTENT FROM A FRIEND OR FAMILY MEMBER

U.S.	AUS	FRA	U.K.	GER	JAP
73%	69%	68%	67%	65%	49%

RULE #4
In Our Relationships We Trust

Content from a work colleague or peer

Content from professional critics (in newspapers, online, on tv, etc.)

Content from a news personality (e.g. nightly news anchor)

Content recommended by a website or service (i.e. based on your specificed or past preferences)

Content from a YouTube celebrity

Content from a traditional entertainment celebrity (i.e. movie star, musician, athlete, etc.)

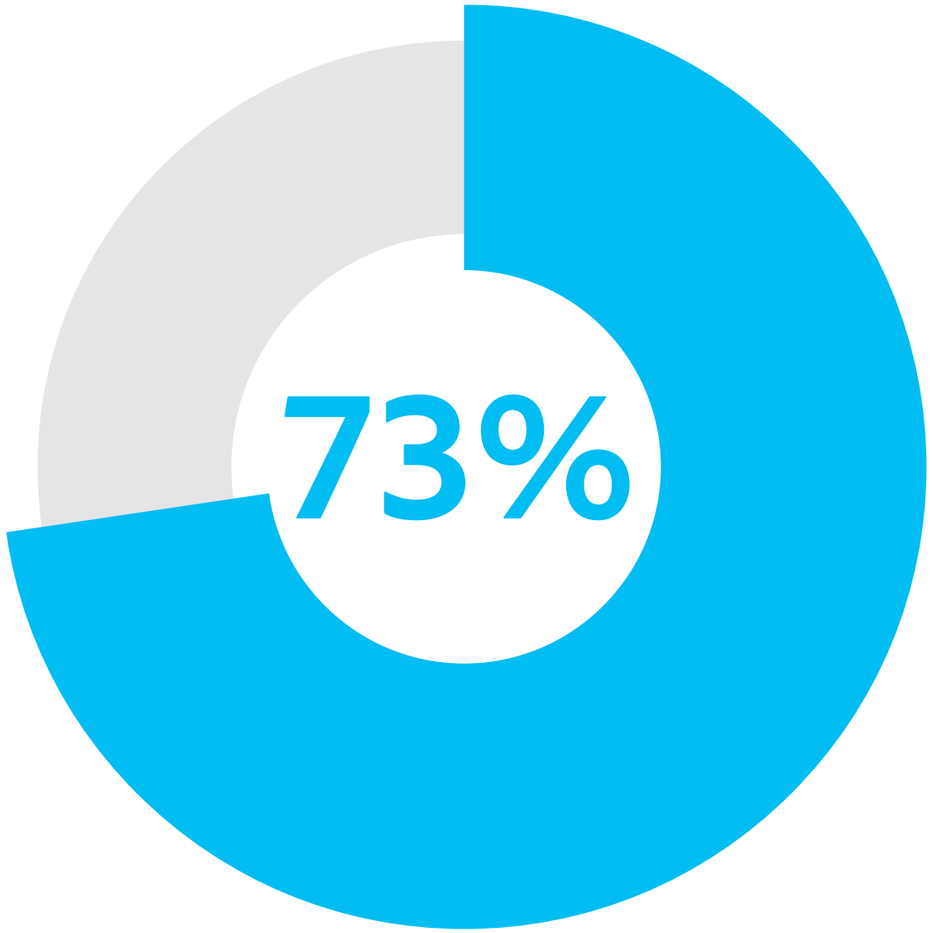
QB10. Which of the following types of content are you most likely to share?
GLOBAL: 6129, US: 999, UK: 1007, AUS: 1014, FR: 1059, DE: 1009, JP: 1041

RULE #5

Don’t Show Up Uninvited

CONSUMERS WILLING TO SHARE INFORMATION, BUT EXPECT RETURN ON VALUE

OPENNESS TO PREDICTIVE RECOMMENDATIONS (% GLOBAL)



Are open to suggestions or predictive recommendations from brands

GER	FRA	U.S.	AUS	JAP	U.K.
84%	78%	76%	69%	67%	64%

RULE #5

Don't Show Up Uninvited

Brands have permission to be better content matchmakers

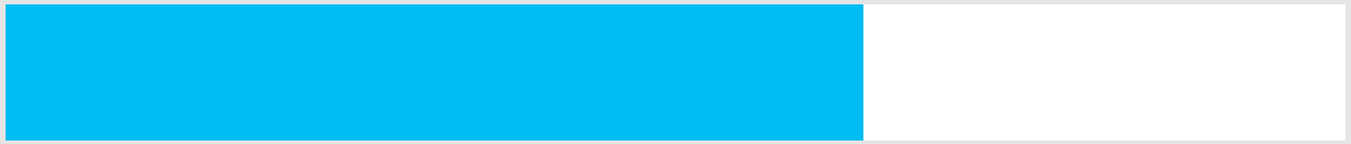
QB12. For each of the following types of sources/ types of content, please indicate whether you prefer it recommended based on your past behavior or curated for you? (The figure represents percent of people who said they prefer recommendations based on past behavior or what is trending for some of their content)
GLOBAL: 6129, US: 999, UK: 1007, AUS: 1014, FR: 1059, DE: 1009, JP: 1041

RULE #5
Don't Show Up Uninvited

Consumers understand the benefit of recommendations, as long as it respects privacy

VIEWS ON RECOMMENDATIONS BASED ON PAST BEHAVIOR (% GLOBAL, TOP TWO BOX)

64% Believe they are meant to enhance the viewing experience

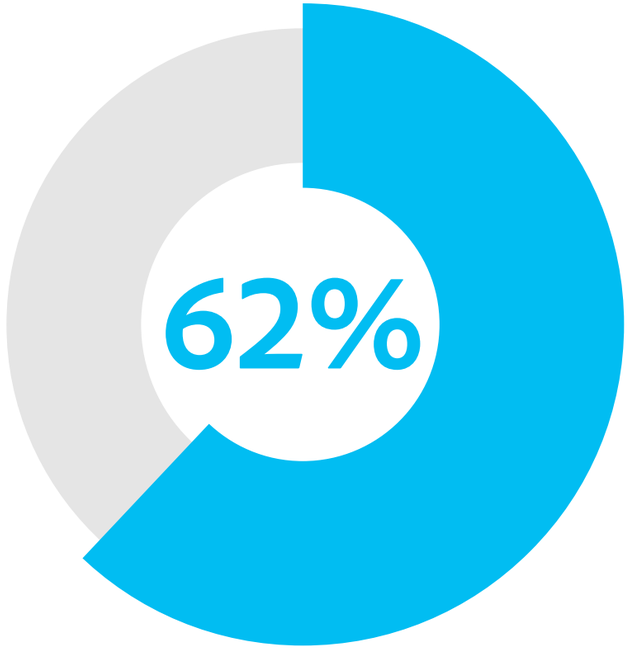


U.S.	U.K.	AUS	GER	FRA	JAP
73%	69%	66%	64%	59%	53%

63% Believe they provide wider exposure to content

U.S.	GER	U.K.	AUS	FRA	JAP
69%	64%	63%	63%	61%	56%

QB13. Thinking about content and the platforms you use to discover it, how much do you agree with each of the following statements when it comes to recommendations based on your past behavior or preferences?
GLOBAL: 6129, US: 999, UK: 1007, AUS: 1014, FR: 1059, DE: 1009, JP: 1041



Believe they don't respect privacy

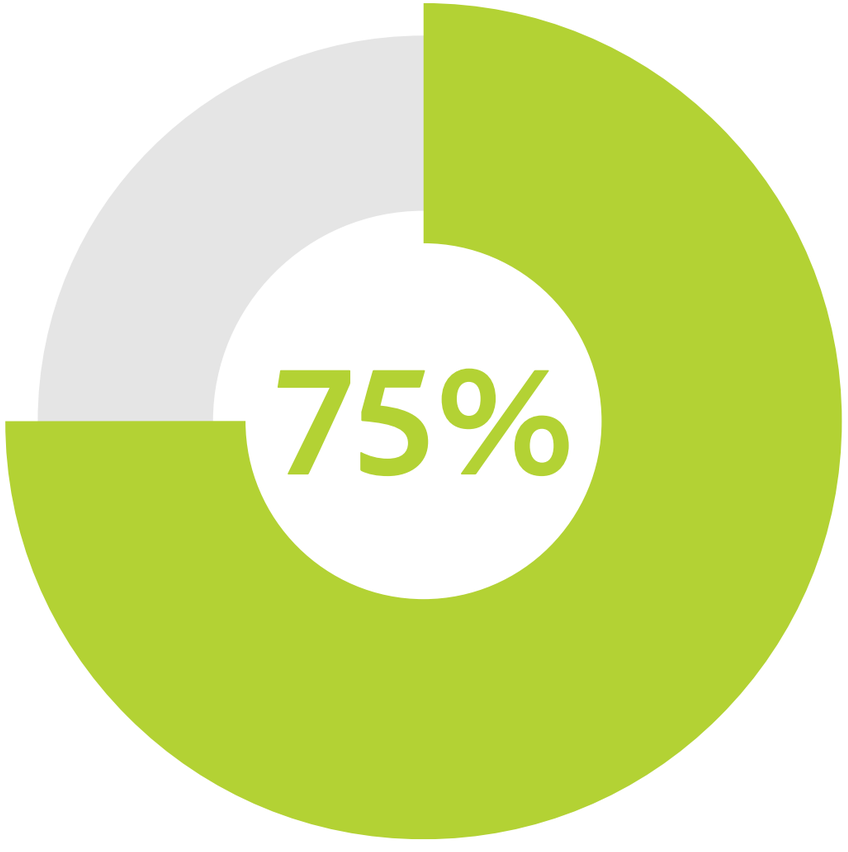
AUS	U.K.	U.S.	FRA	GER	JAP
71%	69%	66%	61%	55%	50%

Many feel comfortable providing information to improve content recommendations from brands

RULE #5

Don't Show Up Uninvited

QB15. Which of the following pieces of information—if any—are you comfortable sharing about yourself to improve the recommendations you see?
GLOBAL: 6129, US: 999, UK: 1007, AUS: 1014, FR: 1059, DE: 1009, JP: 1041
Millennials: 5258, Gen X: 4901, 55+: 2009



COMFORTABLE SHARING INFORMATION FOR RECOMMENDATION IMPROVEMENTS (% GLOBAL)

Of digital users are comfortable with sharing at least one piece of information about themselves in order to improve the recommendations they see

FRA	U.S.	GER	U.K.	AUS	JAP
84%	81%	75%	71%	70%	67%

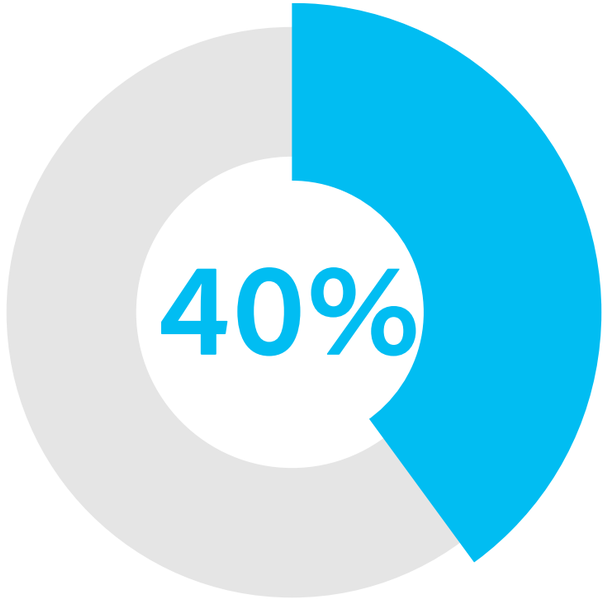
QB15. Which of the following pieces of information if any—are you comfortable sharing about yourself to improve the recommendations you see?
GLOBAL: 6129, US: 999, UK: 1007, AUS: 1014, FR: 1059, DE: 1009, JP: 1041

Consumers feel most comfortable sharing music, videos and purchased products to improve recommendations

COMFORTABLE SHARING FOR RECOMMENDATION IMPROVEMENTS (% GLOBAL)	U.S.	U.K.	AUS	FRA	GER	JAP
37% Music I have listened to	47%	40%	35%	39%	36%	25%
29% Videos I have watched	38%	28%	29%	34%	25%	20%
27% Games I have played	34%	27%	27%	29%	32%	14%
27% Purchases I have made	34%	24%	23%	35%	26%	21%
25% Websites that I frequent	31%	24%	25%	31%	20%	17%
24% Products or services I viewed on websites	31%	23%	23%	28%	21%	20%
24% Content that I have previously liked or shared on social media	32%	22%	26%	28%	27%	9%
20% Recent search engine inquiries / searches	22%	16%	17%	25%	21%	17%
18% Who I am "friends" with or connected to on social media	24%	17%	19%	23%	17%	10%
13% Location or birthday	16%	12%	15%	14%	13%	7%

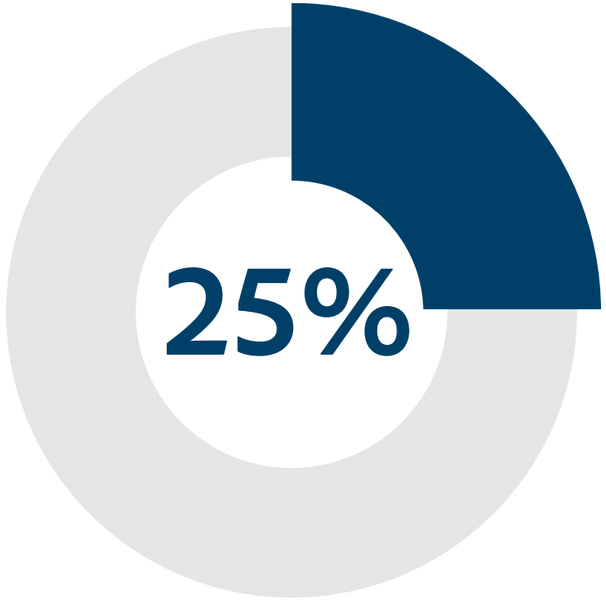
Those who are uncomfortable with predictive recommendations believe companies can do something about it

COMPANY ACTIONS TO MAKE USERS COMFORTABLE (% GLOBAL)



Believe companies could do *something* to ease their concern

GER	U.S.	FRA	U.K.	AUS	JAP
50%	42%	38%	37%	33%	42%



Believe they would be comfortable if companies *asked permission to access their data*

GER	U.S.	U.K.	FRA	AUS	JAP
34%	31%	27%	25%	22%	16%

RULE #5

Don't Show Up Uninvited

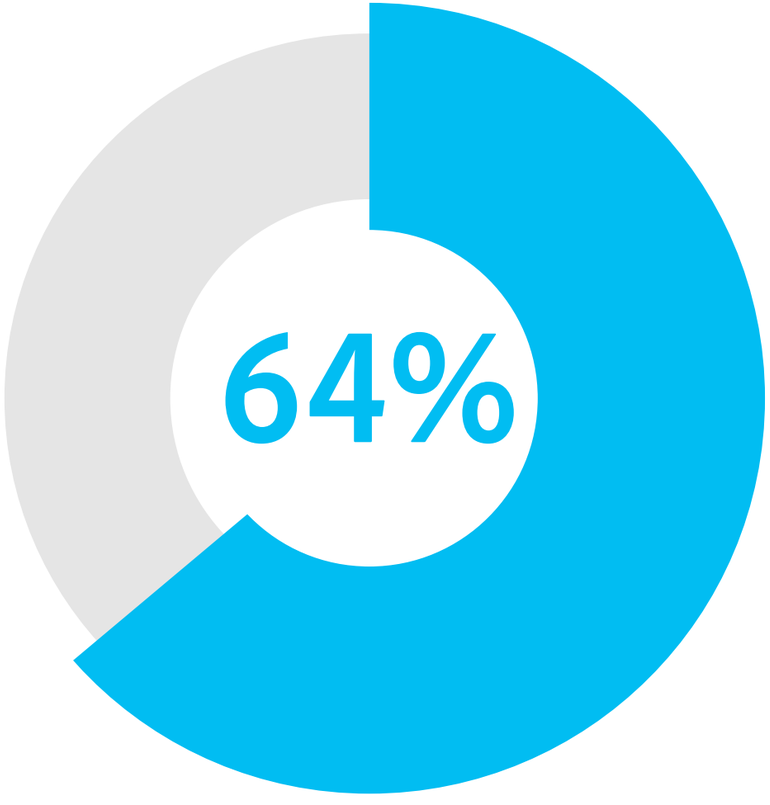
QB16. And which of the following—if any—would make you more comfortable with predictive recommendations?
GLOBAL: 6129, US: 999, UK: 1007, AUS: 1014, FR: 1059, DE: 1009, JP: 1041

THE STATE OF CONTENT: RULES OF ENGAGEMENT

Additional insights

People are not only consuming content, but actively engaging with it

DO YOU SHARE CONTENT ONLINE? (AMONG TOTAL)

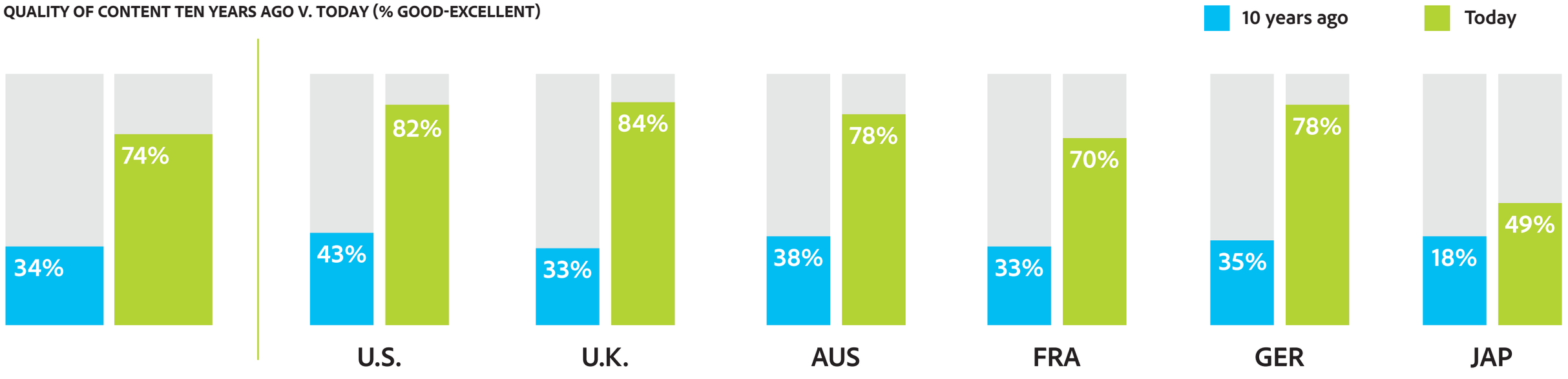


Share content online

U.S.	FRA	GER	U.K.	AUS	JAP
75%	74%	69%	63%	61%	43%

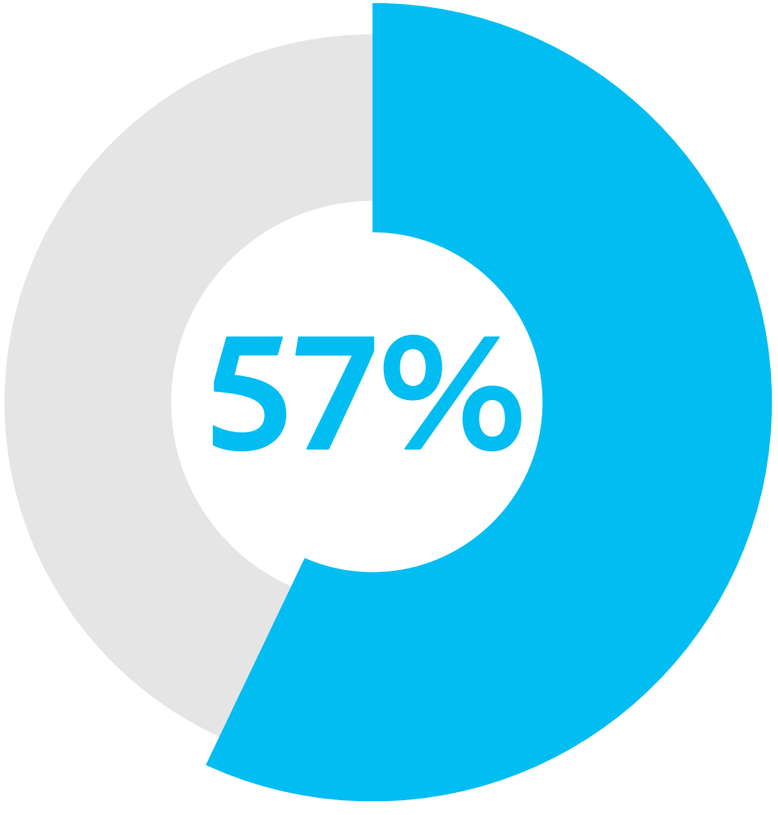
Q8. Do you share content online?
GLOBAL: 12169, US: 2008, UK: 2007,
AUS: 2016, FR: 2114, DE: 2009, JP: 2014

People believe content is better today than it was ten years ago



QA3. Overall, how would you rate the quality of the content you see today vs. 10 years ago?
GLOBAL: 6040, US: 1009, UK: 1000, AUS: 1002, FR: 1055, DE: 1001, JP: 973

Consumers agree that technology has changed the way we interact with people



AGREEMENT WITH STATEMENT (% GLOBAL)

Say that technology has changed how they interact with people over the past 10 years

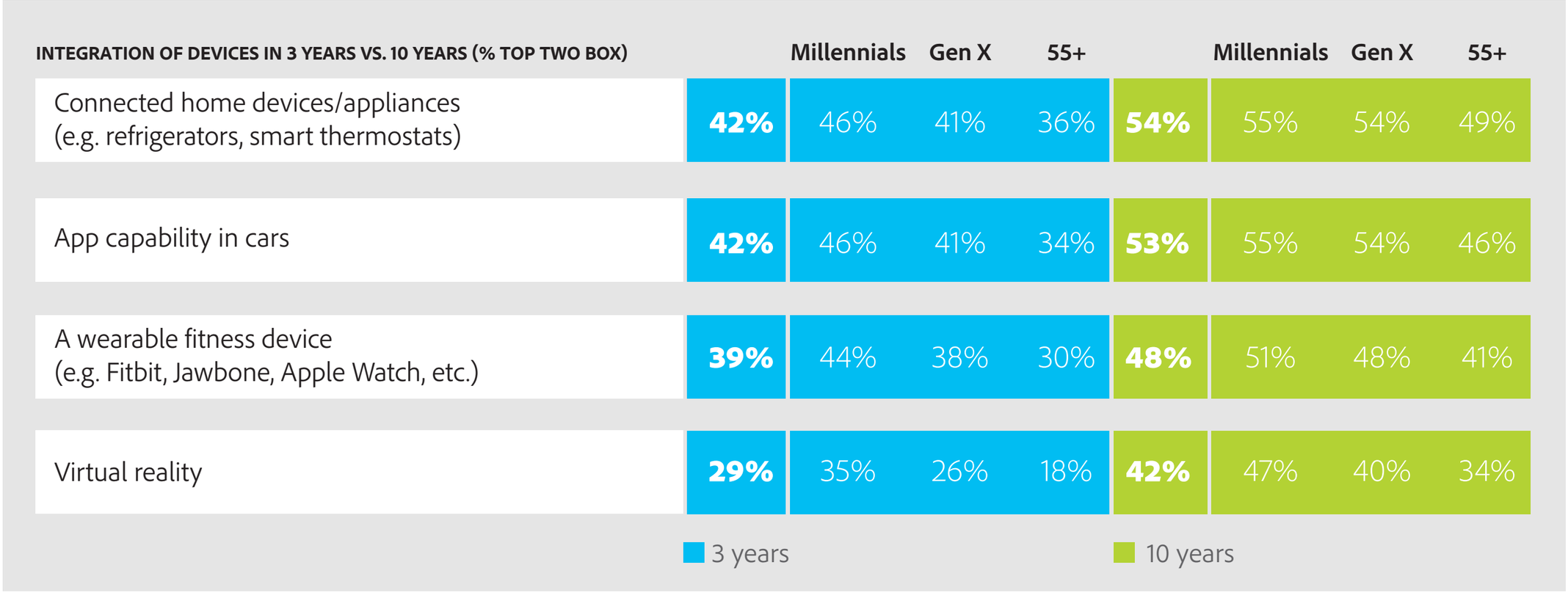
U.S.	JAP	U.K.	AUS	FRA	GER
66%	64%	58%	58%	51%	45%

Agree **more** — Agree **less**

Millennials	Gen X	55+
61%	56%	47%

QA4. When you think about the new technology that has been introduced in the past ten years, how much do you agree or disagree with the following statements
GLOBAL: 6040, US: 1009, UK: 1000, AUS: 1002, FR: 1055, DE: 1001, JP: 973

And that technology will continue to become more integral in our lives



Q6. When you think about the future, how likely do you think these types of devices would be integrated in your every day life in 3 years? And in 10 years?
GLOBAL: 12169, US: 2008, UK: 2007, AUS: 2016, FR: 2114, DE: 2010, JP: 2014

Digital users are torn between the benefits and drawbacks of today's content landscape

AGREEMENT OF CHANGE NOW VS. FIVE YEARS AGO

Young people are overly dependent on devices	73%
Content is more visual than it used to be	69%
Young people spend too much time on screens as opposed to in-person interaction	68%
It is easier to share photos/pictures/posts with my friends and family	67%
It is easier for anybody to create content	64%
It is easier to stay up-to-date with what my friends and family are doing	61%
It is easier now to find content that's relevant to me	59%
It is easier to interact with my favorite companies and products	56%
I feel like there is too much content out there	49%
I wish I could more frequently "unplug" from all content and devices	38%
I am less likely to read anything all the way to end	37%
It is harder to feel deeply connected to friends and family	31%

66%

Of Millennials agree young people are "overly dependent" on devices

60%

Of Millennials agree young people spend too much time on screens as opposed to in-person interactions

QA2. How strongly do you agree with the following statements about how things are now compared to fixe years ago?
GLOBAL: 6040, US: 1009, UK: 1000, AUS: 1002, FR: 1055, DE: 1001, JP: 973

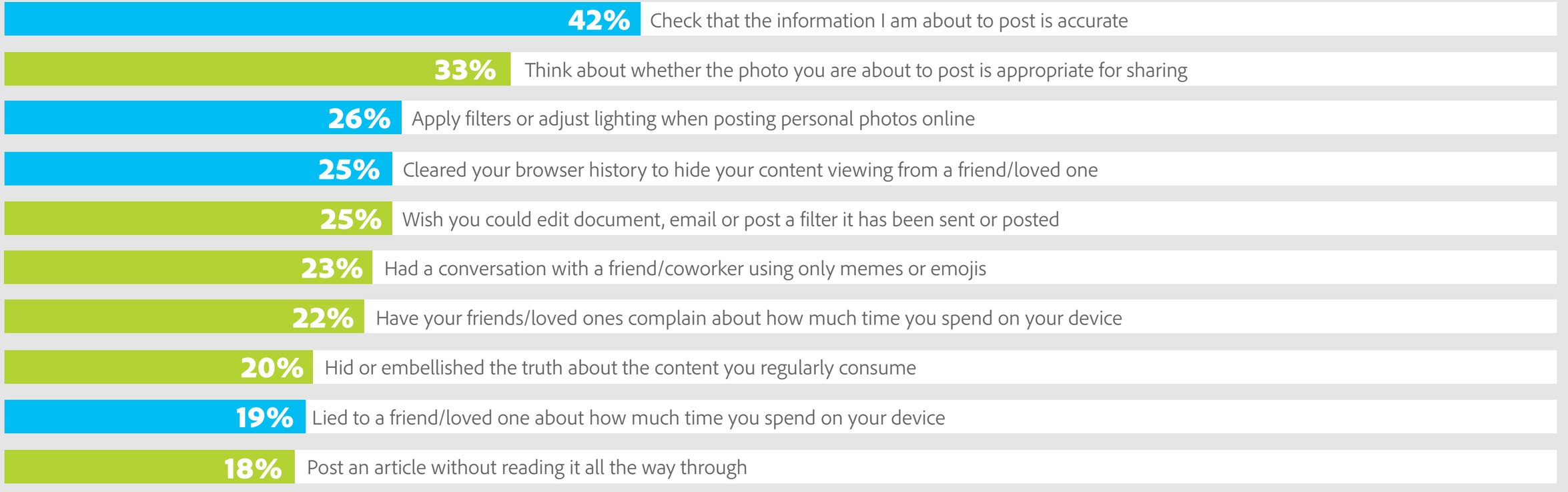
The evolving digital content landscape is influencing online and offline behavior

		U.S.	U.K.	AUS	FRA	GER	JAP
42%	Check that the information I am about to post is accurate	54%	48%	48%	45%	42%	17%
30%	Think about whether the photo you are about to post is appropriate for sharing	37%	33%	37%	25%	32%	14%
20%	Cleared your browser history to hide your content viewing from a friend/loved one	26%	19%	17%	27%	22%	8%
17%	Wish you could edit document, email or post a filter it has been sent or posted	25%	16%	15%	18%	20%	10%
17%	Apply filters or adjust lighting when posting personal photos online	23%	15%	16%	21%	18%	9%
15%	Had a conversation with a friend/coworker using only memes or emojis	21%	14%	14%	17%	18%	7%
15%	Have your friends/loved ones complain about how much time you spend on your device	23%	15%	14%	18%	15%	5%
12%	Hid or embellished the truth about the content you regularly consume	17%	11%	10%	15%	14%	7%
12%	Lied to a friend/loved one about how much time you spend on your device	18%	12%	11%	14%	13%	4%
12%	Post an article without reading it all the way through	19%	12%	10%	14%	13%	5%

29% OF U.S. MEN REPORT CLEARING THEIR BROWSER HISTORY VS. 22% OF U.S. WOMEN

QB19. Do you ever do any of the following activities online?
GLOBAL: 6129, US: 999, UK: 1007, AUS: 1014, FR: 1059, DE: 1009, JP: 1041

Millennials are mindful of their digital footprint

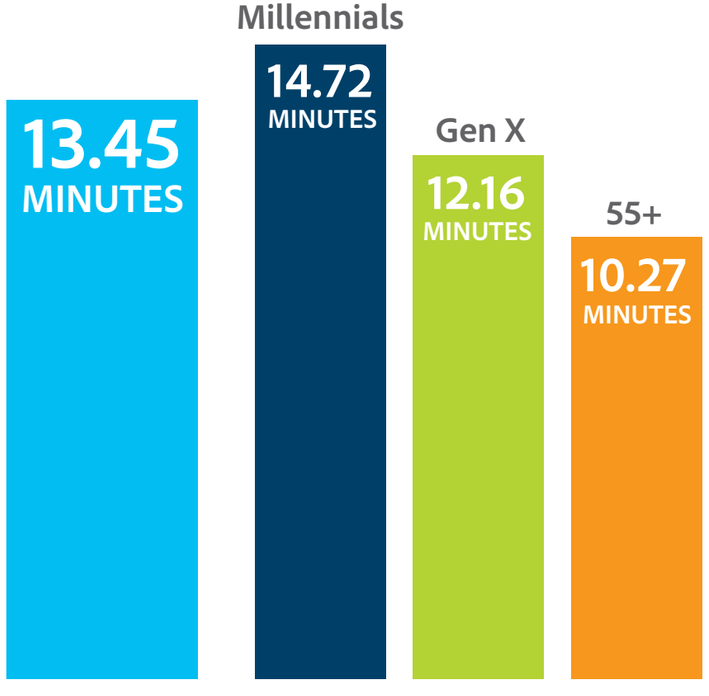


QB19. Do you ever do any of the following activities online?
Global: 5,259; US: 857: UK: 821; AUS: 822: FR: 986; DE: 895; JP: 878

Millennials invest extra time polishing their digital content

LENGTH OF TIME SPENT EDITING SOCIAL MEDIA CONTENT

Device users spend an average of 13.45 minutes editing content they plan to post



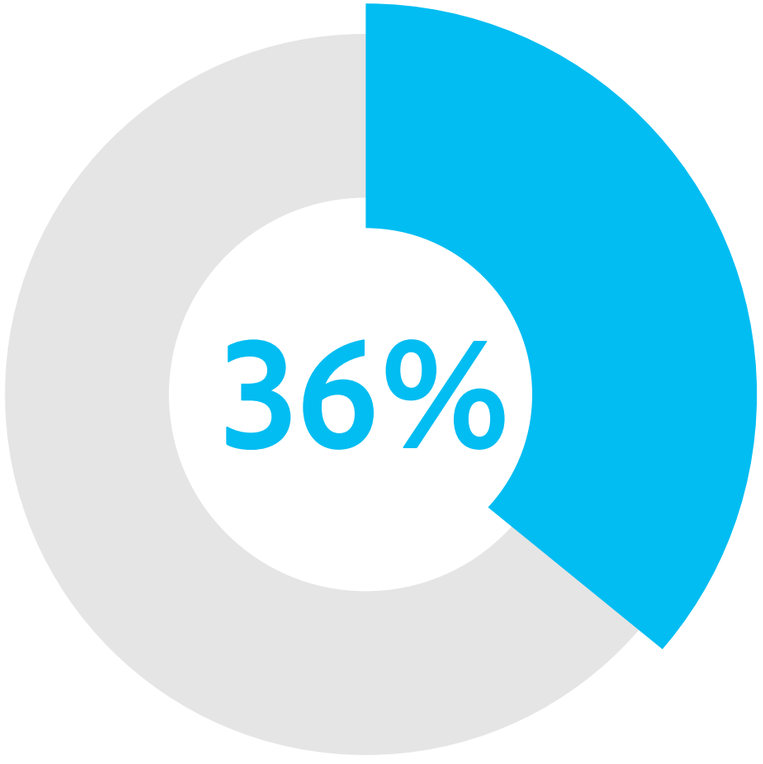
QB20. On average, how many minutes per piece of content (post, photo, or comment) do you spend editing content that you plan to post on social media (e.g. editing language, cropping, adding filters to photos, etc.)?
GLOBAL: 6129, US: 999, UK: 1007, AUS: 1014, FR: 1059, DE: 1009, JP: 1041

THE STATE OF CONTENT: RULES OF ENGAGEMENT

Appendix

Connecting with people is pivotal when sharing content

PERSONAL DRIVER FOR SHARING CONTENT (% GLOBAL)



Believe connecting with people that matter to them is the most important personal driver for sharing content online.

U.S.	U.K.	AUS	FRA	GER	JAP
42%	40%	40%	32%	32%	31%

QB21. Which of the following is the most important personal driver for sharing content online?
GLOBAL: 6129, US: 999, UK: 1007, AUS: 1014, FR: 1059, DE: 1009, JP: 1041

Devices and sources of content

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

A wearable 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)

QB21. Which of the following is the most important personal driver for sharing content online?

SOURCES OF CONTENT

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)

Types of content

SELF-CREATED CONTENT

Selfies

Information about issues I care about

Content I have created myself (something I have written, crafted, etc.)

Photos I have taken myself

Twitter updates

Videos I have created myself (includes YouTube, Periscope, Vine)

Reviews I have written (movies, products, businesses, etc.)

EXTERNAL CONTENT

Topical articles/news content

Humorous content

Photos from others (share, pin, etc.)

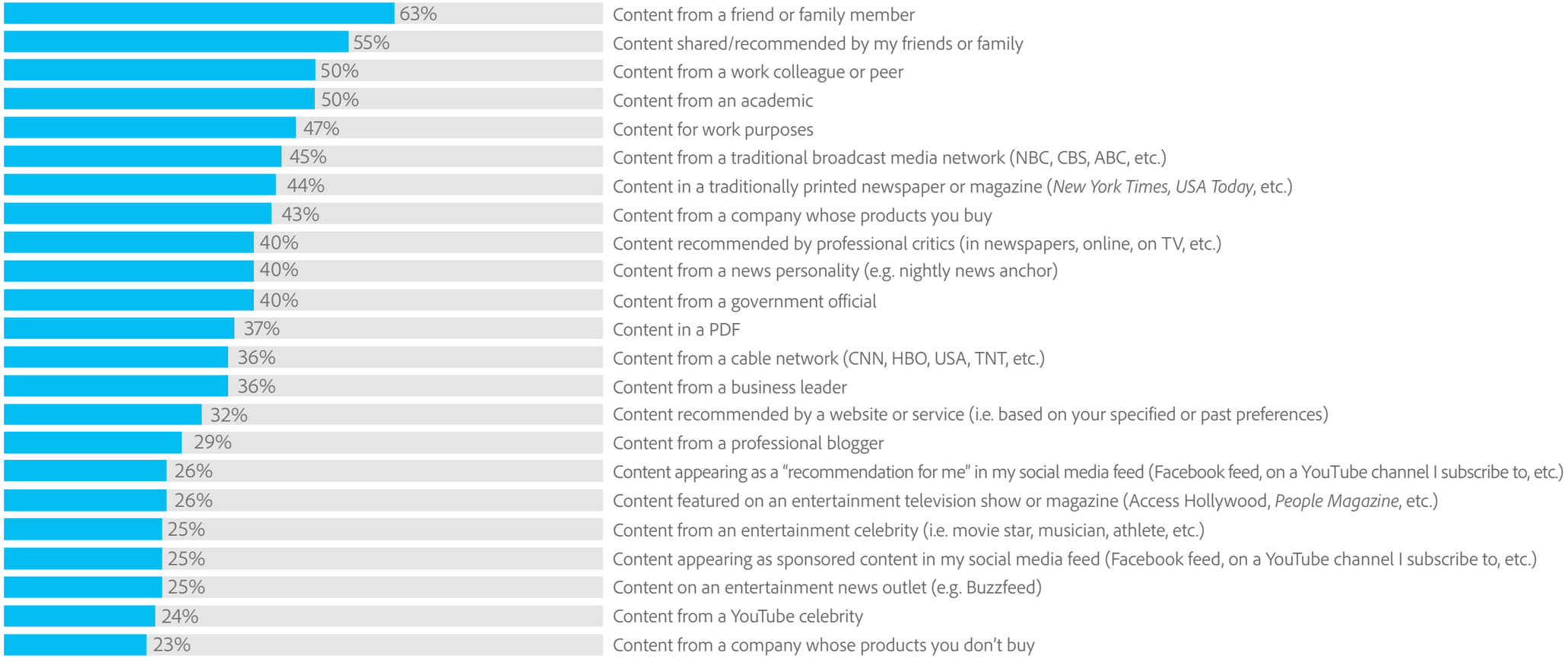
Videos others have created (includes YouTube, Periscope, Vine)

Reviews others have written (movies, products, businesses, etc.)

QB21. Which of the following is the most important personal driver for sharing content online?

QB9: Trusted sources of content

TRUSTWORTHINESS OF CONTENT (% TOP TWO BOX)



QB9. Please indicate how much you trust the following types of content, independent of who originally created it. GLOBAL: 6129, US: 999, UK: 1007, AUS: 1014, FR: 1059, DE: 1009, JP: 1041

QB11: Forms of content communication

COMPANY CREATED CONTENT	Content that is created by or for a brand, such as websites, articles, whitepapers etc.
COMPANY BRANDED ADVERTISEMENTS	Traditional advertisement, for example a commercial or magazine advertisement
NATIVE ADVERTISING	Content that is intended to "blend in" so that it seems less like an ad and more like part of the platform, or an ad that appears to be an article
CHOICE ADVERTISING	Being asked which ad you want to view when viewing videos online
BEHAVIORAL ADVERTISING	Ads or recommended content based on your online behavior
LOCATION BASED/BEACON-DRIVEN ADVERTISING	Advertising that uses location-based services to target ads

QB11. What is your general opinion of the following forms of company communication?

QB18: Motivations for sharing content

AMONG THOSE WHO DO SHARE LISTED CONTENT (% GLOBAL)

When you share content, what are your motivations?	External content
To make people laugh	37%
To raise awareness on a particular issue	29%
To show friends content I think they will enjoy	27%
To share my knowledge on a particular subject	21%
To connect with people who feel similarly to me	20%
To share my life moments with my friends	19%
To get likes	17%
To share relevant professional insights *[among employed]*	17%
To get advice or comments	13%
To help other people understand me better	12%
To give advice	11%
To raise visibility of my brand/business insights *[among employed]*	10%
To keep a memory archive of things that matter to me	9%
To share a sense of pride and fulfillment around my creations	8%
To share my professional accomplishments *[among employed]*	6%
To keep information organized to come back to later	6%

QB18. When you share the following types of content, what are your motivations? Please select all that apply.
GLOBAL: 6129, US: 999, UK: 1007, AUS: 1014, FR: 1059, DE: 1009, JP: 1041

**content considered self-created and external available in the Appendix (page XX)*