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BRIDGING THE GAP:

Consumer & Marketer Perspectives on Content in the Digital Age

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Introduction

In 2017, we published the "Consumer Content Report: Influence In The Digital Age" which revealed that 86% of people believe authenticity is important when deciding what brands they like and support, and user-generated content (UGC) is seen as the most authentic and influential content by consumers.

This year, we wanted to delve deeper into the types of content consumers are creating, referencing and being influenced by across a diverse array of buying experiences. At the same time, we sought to understand the perspective of the B2C marketers who are creating these content experiences for consumers.

By looking at both the consumer and marketer sides of the content equation, this survey uncovers the gaps in perception that exist between what consumers want and what marketers believe they're providing.

We surveyed 1,590 consumers and 150 B2C marketers from the U.S., UK and Australia, finding that although consumers and marketers agree on the importance of authenticity and personalization, their opinions significantly diverge when it comes to which content types and sources are the most authentic, influential and desired throughout the buying process.

As consumers continue to look to social media to discover products, establish relationships with brands and make purchasing decisions, authentic and personalized content experiences play an increasingly important role. Gen Z and Millennials, in particular, seek visually engaging and unvarnished content when deciding what brands to support and which purchasing decisions to make, but feel that brands aren't delivering these types of experiences that are most relevant and influential for them.

At the same time, marketers are struggling to keep up with increasing content demands and are ultimately not delivering experiences that are authentic, relevant or personalized enough for this new generation of consumers.

Key Findings

Authenticity has never been more important

- 90% of consumers say authenticity is important when deciding which brands they like and support (up from 86% in 2017) and 83% marketers agree that authenticity is very important to their brands

- Although 92% of marketers believe most or all of the content their brands create resonates as authentic, 51% of consumers say *less than half* of brands create content that resonates as authentic

The authenticity and influence of UGC is unmatched

- Consumers are 2.4x more likely to say user-generated content is most authentic compared to brand-created content, while marketers are 2.1x more likely to say brand-created content is most authentic compared to UGC

- 79% of people say UGC highly impacts their purchasing decisions, yet only 13% said branded content is impactful and a mere 8% said influencer-created content would highly impact their purchasing decisions

- Consumers find UGC 9.8x more impactful than influencer content when making purchasing decision, yet 49% of marketers are planning to increase their investment in influencer marketing in 2019

Marketers aren't personalizing as well as they think

- 67% of consumers (73% of Gen Z and 70% of Millennials) say it's important for brands to provide them with a personalized experience

- 92% of marketers believe their brands deliver personalized experiences to customers, but 14% of consumers disagree and another 41% neither agree nor disagree that the majority of brands provide personalized experiences

Content is a persistent challenge marketers

- Marketers say their top 3 content challenges are measuring content efficacy (60%), effectively managing content (57%) and producing or sourcing enough engaging visuals (50%)

- 63% of marketers feel pressure to continually produce greater amounts of content at a higher frequency

- 67% of marketers say they plan to increase their use of brand-created visuals, but only 15% of consumers say that's the type of content they most want to see from brands

Consumers create the content they want from brands

- 56% of consumers say UGC photos and videos are the content they most want to see from brands

- 89% of people would post about a positive travel destination experience

- 85% of people would post about a positive restaurant dining experience

- 65% of people would post about a positive health or beauty product experience

- 62% of people would post about a new car

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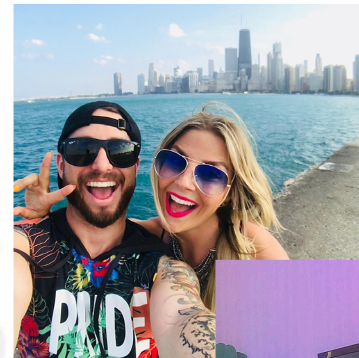
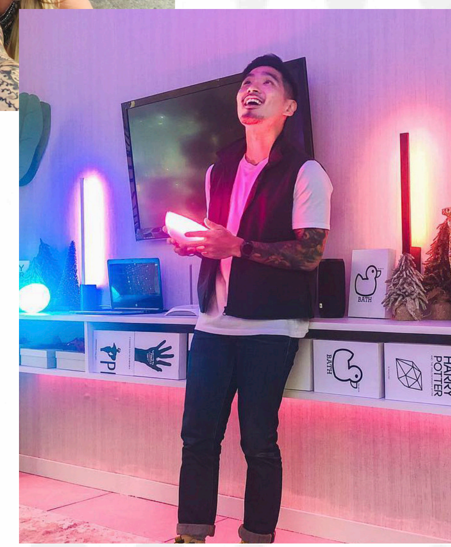
AUDIENCES CRAVE AUTHENTICITY

90% of consumers say authenticity is important when deciding which brands they like and support





Importance of Authenticity is at an All-Time High

Now, more than ever, consumers crave authenticity. A whopping 90% of consumers say authenticity is important when deciding which brands they like and support — up from 86% in 2017. This is a sentiment that is not lost on marketers, with 83% saying authenticity is very important to their brands.

So which type of content do consumers believe is most authentic? User-generated content is viewed as the most authentic form of content by consumers globally, with 58% of consumers agreeing. Meanwhile, marketers are on a different page.

When asked what the most authentic form of content was, 43% of marketers diplomatically said all types of content can be 'equally authentic', followed by 32% of marketers who believe brand-created content is most authentic and a mere 15% who said consumer-created content was most authentic.

In other words, consumers are 2.4x more likely to say consumer-created content is most authentic compared to branded content and over 19x more likely to say it's most authentic compared to stock photography. Conversely, marketers see brand-created content as 2.1x more authentic than consumer-generated content — a gap in perspective marketers will need to bridge in order to meet consumers' demands for authentic content experiences.

Consumers and marketers disagree on which type of content is most authentic

2.4X

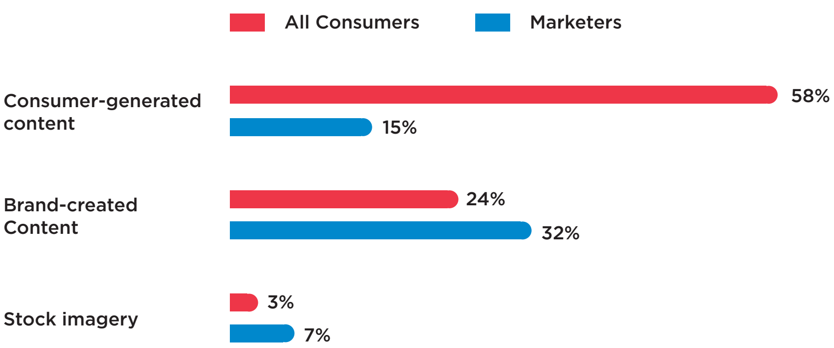
Consumers are 2.4x **more likely** to say **UGC is most authentic** compared to branded content

— VS —

2.1X

Marketers are 2.1x **more likely** to say **brand-created content is most authentic** compared to UGC

Which type of content is the most authentic?



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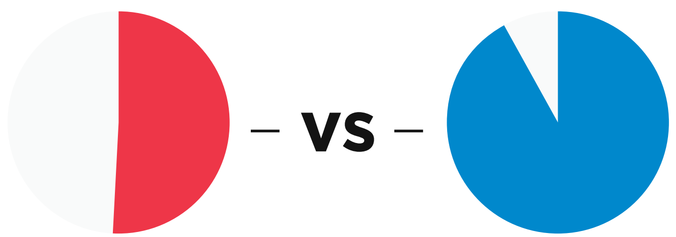
Importance of Authenticity is at an All-Time High

The disconnect between marketers and consumers' views of content authenticity can help explain their diverging perspectives on brands' ability to deliver content that resonates as authentic to audiences.

Although brands have gotten slightly better at putting authentic content in front of their audiences, the majority of consumers (51% — down from 57% in 2017) still believe *that less than half of brands create* content that resonates as authentic. Yet, 92% of marketers believe most or all of the content their brand creates resonates as authentic with consumers, proving that while they've made incremental progress in recent years, marketers' confidence in the authenticity of their content remains overly bullish.



51%

of **consumers** believe that less than half of brands create **content that resonates as authentic**

92%

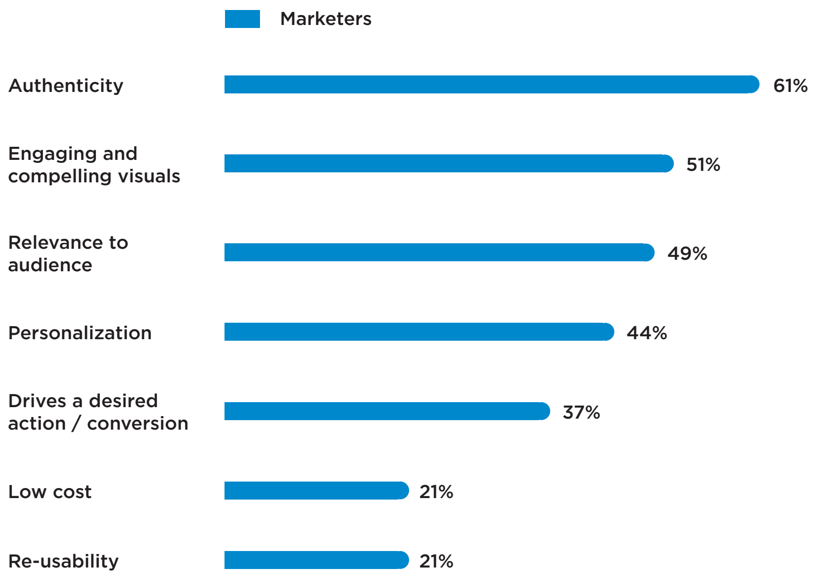
of **marketers** believe most or all of the **content their brand creates resonates as authentic** with consumers

Authenticity leads to content efficacy in marketers' minds

When asked what makes content marketing effective, 61% of marketers said authenticity, 51% said engaging and compelling visuals and 49% said relevance to audience.

Herein lies a crucial issue for marketers: they believe authenticity is the most important component of effective content, yet the content they perceive to be the most authentic — brand-created content — is not the content the people they're trying to reach view as the authentic.

What do you believe makes content effective?



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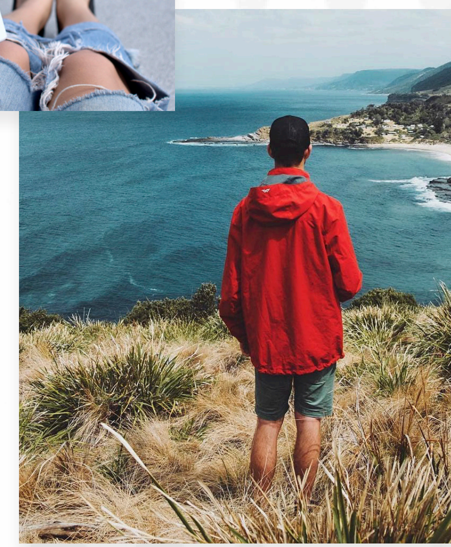
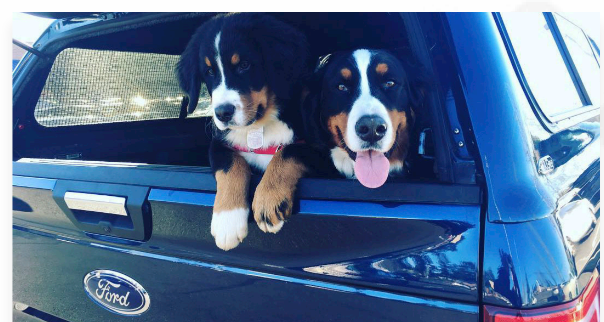
INFLUENCING CONSUMER PURCHASING DECISIONS

79% of people say UGC highly impacts their purchasing decisions





UGC's Influence is Unmatched Across Industries

The influence of brand and influencer content is declining while UGC's grows

Consumers now have more ways than ever to discover, research and purchase products and services. But of the thousands of visuals they encounter everyday, which are the most influential when it comes time to make a purchasing decision?

In 2017, we revealed that on average 60% of people said consumer-created content influences people's purchasing decisions. This year, that trend has significantly grown, with 79% of people saying user-generated content highly impacts their purchasing decisions.

Even more notable is the waning impact celebrities and social influencers have on people's purchasing decisions, with only 8% saying influencer content highly impacts their purchases — down from 23% in 2017. This makes user-generated content 9.8x more influential than influencer content.

9.8X

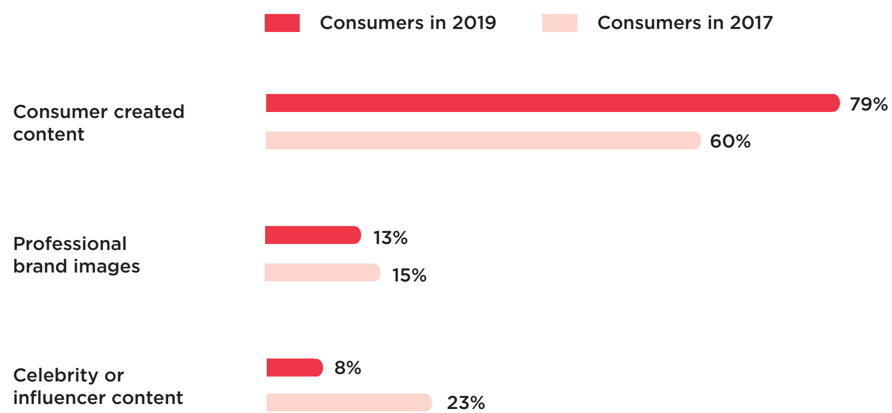
UGC is 9.8x more likely to **impact people's purchasing decisions** than influencer content

Consumers and marketers disagree on the efficacy of branded-created content

Once again, there is a glaring disconnect between the type of content that most impacts consumers — user-generated content — versus the type of content marketers believe is effective — brand-created content.

Although only 13% of consumers say that brand-created content influences their purchasing decisions, 61% of marketers believe their branded visuals are highly effective, with 38% saying they're moderately effective and only 1% saying they're slightly effective.

Which type of content highly impacts your purchasing decisions?



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Consumer Content Has Transformed Travel

Consumers Increasingly look to social proof for travel inspiration & validation

It's hard to understate the impact social media has had on the travel industry. In our 2017 Consumer Content Report, we found that most people look to consumer-created content for travel inspiration and validation — a rising trend this year's study digs deeper into throughout all the key stages of the travel booking cycle.

Travel inspiration

When we asked consumers which sources of content have sparked their interest in traveling to a particular destination, photos posted by friends, family or peers on social media were the top source of inspiration, with 86% of people (and 92% of Gen Z) saying they've become interested in a specific location based on that visual social proof.

Noticeably, the type of social content matters; consumer-created photos are 1.8x more likely to interest people in travel than images from a celebrity or social influencer.

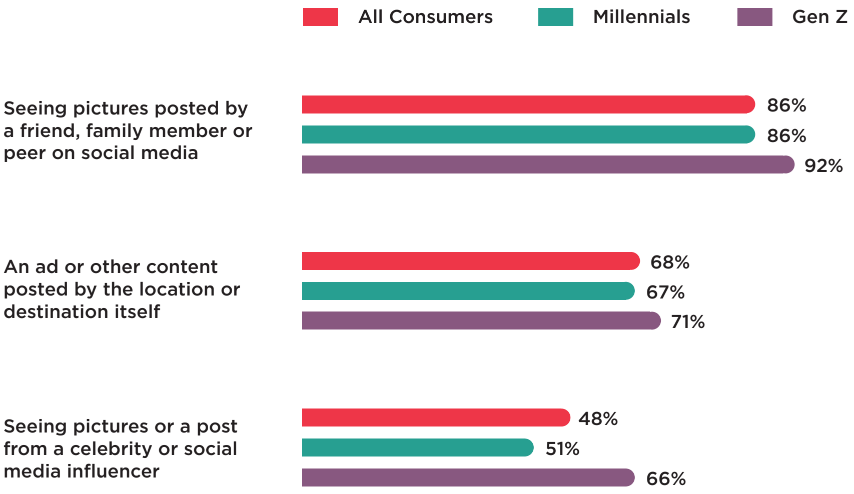
86%

of people have become **interested in traveling** to a certain destination **after seeing social images** from friends, family or peers

1.8X

UGC is 1.8x more likely to **make people interested in traveling to a specific destination** than influencer photos

Have you ever become interested in traveling to a certain location based on the following content sources?



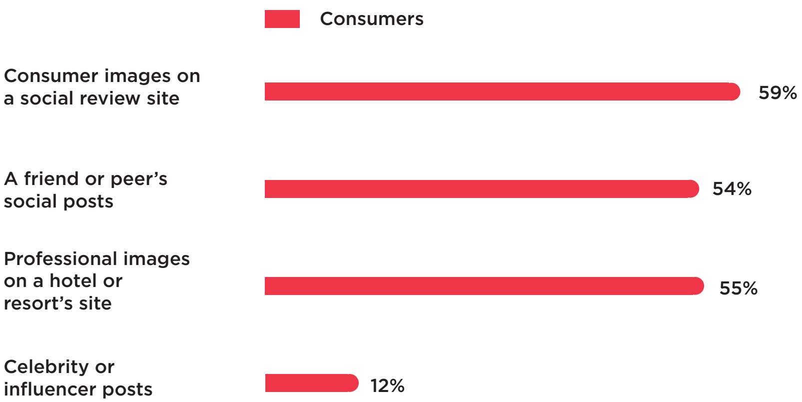
Consumer Content Has Transformed Travel

Travel research

What exactly are people looking for when they browse online travel, hospitality and destination sites?

As it turns out, the majority are referencing user-generated visuals on social review sites (59%) and social networks (54%) as well as professional photos from hotels or resorts (55%). Yet, only 12% said they'd reference celebrity or influencer photos when planning travel.

Which types of content do you reference when planning travel?



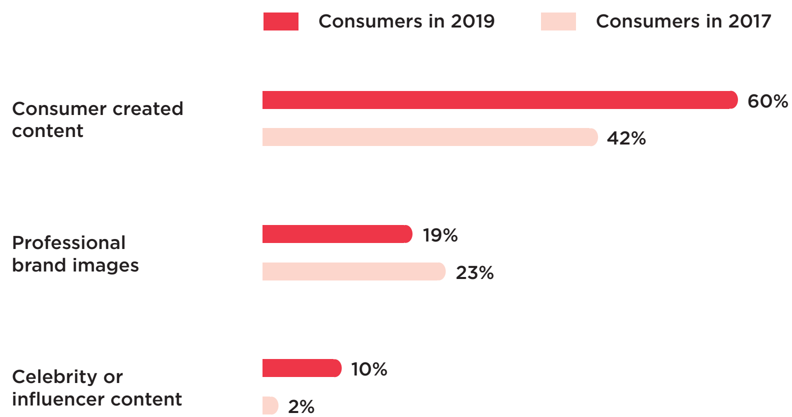
Since the ubiquitous accessibility of the internet has provided consumers with a wide variety of reference points to explore during the research phase of their travel planning process, we sought to understand which content sources are most influential.

While the influence of UGC and professional branded images have improved since our last survey in 2017, the influence of celebrities and social influencers has declined.

Sixty percent of people said content from friends, peers or other consumers were the most influential (up from 42% in 2017), 23% said professional images from travel brands' websites (up 19% from 2017) and a mere 2% said influencer photos were the most influential (down from 10% in 2017).

In fact, 38% of people went so far as to say content from celebrities or social media influencers never impacts which hotel or resort they choose to stay at when traveling.

The most influential content to consumers when planning travel:



Consumer Content Has Transformed Travel

Booking travel

Consumer-generated images aren't just theoretically influencing people's travel decisions, they're directly driving bookings — and in greater volumes than in the past.

In fact, over half of consumers (52%) say they've made plans to visit a specific destination based on an image or video they saw from friends, family or peers on social media — up from 43% in 2017.

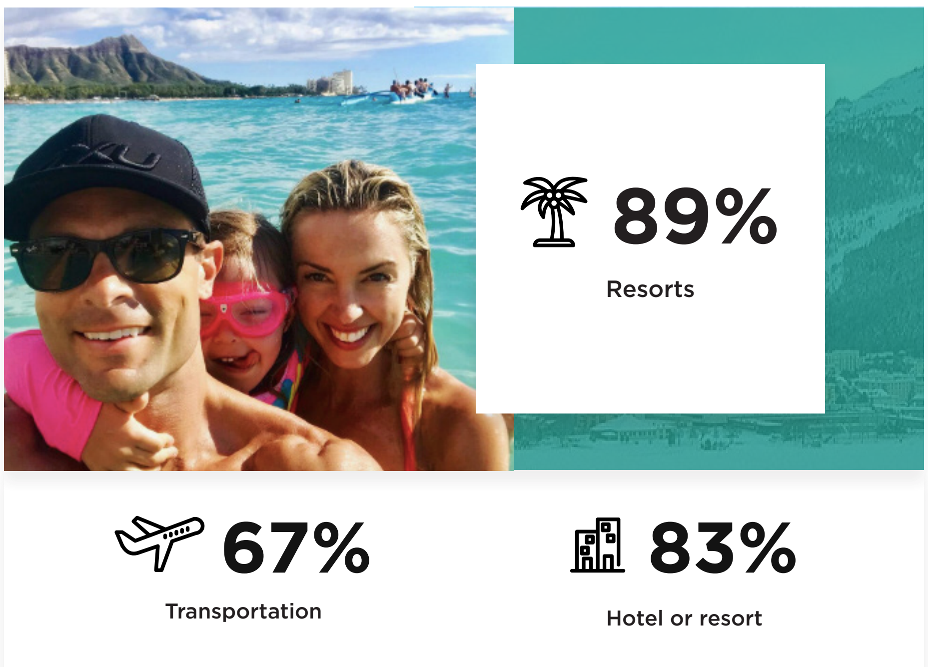
Percentage of people who have made plans to visit a certain location after seeing user-generated photos on social media

Advocacy

Today's consumers aren't just inspired and influenced by user-generated travel content, they're also active content creators who help perpetuate this virtuous cycle of inspiration and validation for others.

When asked how likely they would be to post a photo or video of a positive experience in the follow scenarios, an overwhelming majority of people said they would post about a destination experience, a hotel or resort experience and a transportation experience.

Percentage of people who would post about a positive travel experience:



Consumer Content Has Transformed Travel

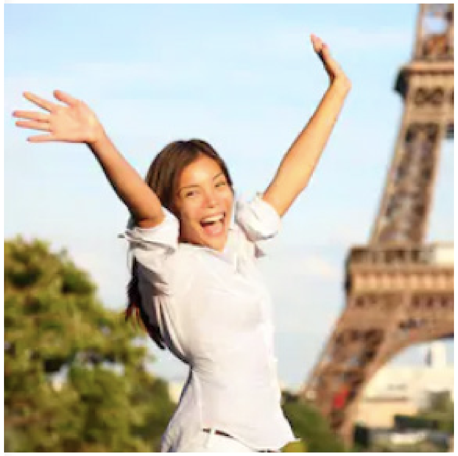
Putting Consumers to the Test

Understanding that seeing is believing, we also put consumers to the test, showing them two photos side by side: one was a piece of user-generated content and the other was a piece of stock photography — both featured women smiling with their arms raised in front of the Eiffel Tower in Paris, France.

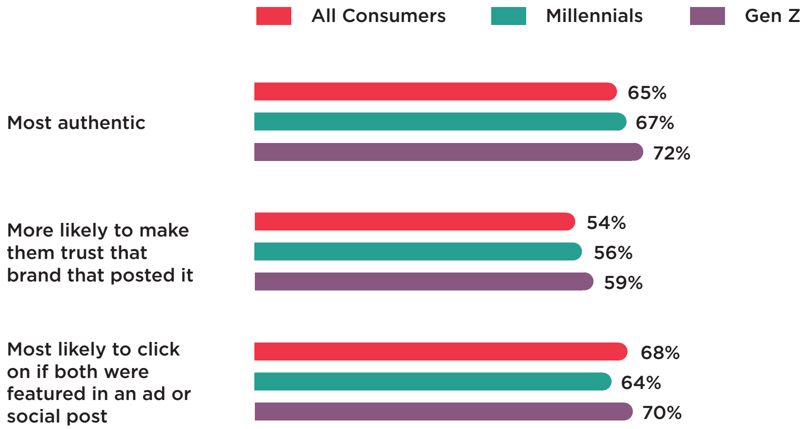
Given the choice between the two images, the majority of people said the user-generated image (Photo A) was the most authentic, more likely to make them trust the brand that posted it and the most likely to be the image they would click on if both were featured in an ad or social post.

Photo A: UGC

Photo B: Stock Photography



Consumers' sentiments about the travel UGC (Photo A) when compared to a similar stock photo (Photo B)



When given the choice, the majority of consumers chose the user-generated image (Photo A) as:

Most authentic

Most likely to make them trust the brand that posted it

Most likely to click on if both were featured in an ad or social post

Visuals Determine People's Dining Decisions

Feeding people the visual content they crave

We asked what the main influencers were the last time people tried a new restaurant and the largest percentage of consumers (55%) said social photos from a friend or peer, with images from a social review site closely following (45%).

When pressed for what was the most influential, 45% of people said content created by friends and peers were the most impactful when deciding which restaurant to dine at — up from 25% in 2017.

This trend was even more pronounced among younger consumers, with 49% of Gen Z consumers and 44% of Millennials saying consumer-generated content influences the restaurants they decide to dine at every time or most of the time.

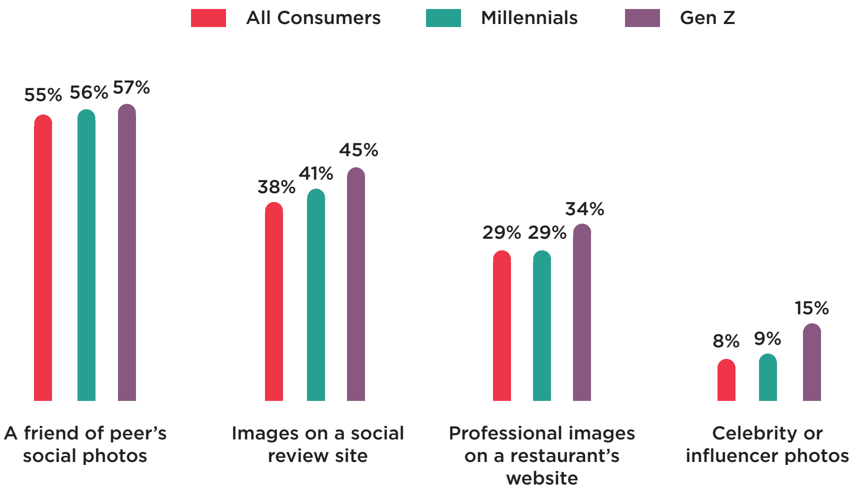
The influence of UGC even carries over to consumer packaged food products with 42% of Gen Z consumers and 36% of Millennials saying consumer-generated content influences the type of snack, food or beverage they buy every time or most of the time.

And that's not just talk, 57% of people have made plans to dine at a certain restaurant based on an image or video a friend, family member or peer posted on social media — up from 39% in 2017.

57% of people have made **plans to dine at a certain restaurant based on a social image** or video from friends, family or peers

45% of people said a **friend or peer's social images** are the most **influential content** when deciding which restaurant to dine at

The last time you tried a new restaurant, what were the main influencers of you deciding on that restaurant?



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Visuals Determine People's Dining Decisions

Once they've had a positive food experience, the majority of people are posting about it. In fact, 85% of people said they would post about a positive dining experience at a restaurant and 67% said they would post about a positive fast food or packaged food and beverage experience.

Putting consumers to the test

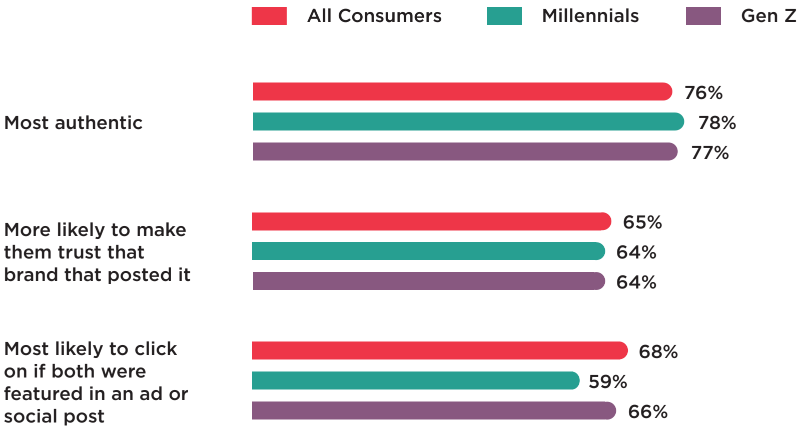
We showed consumers two side by side photos of a group of people eating at a fast food restaurant: one was a brand-created image and the other was user-generated.

Given the choice between the two images, the majority of people said the user-generated image (Photo B) was the most authentic, more likely to make them trust the brand that posted it and the most likely to be the image they would click on if both were featured in an ad or social post.

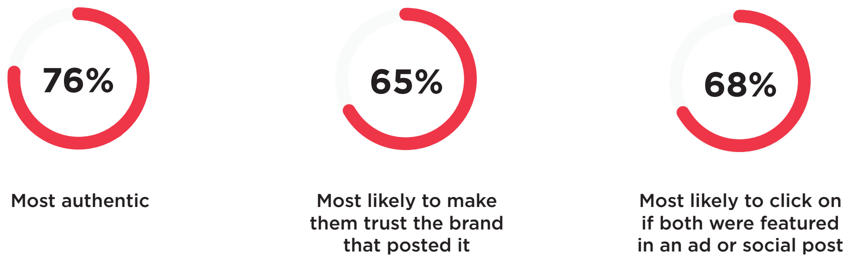
Photo A: Brand Photo

Photo B: UGC

Consumers' sentiments about the dining UGC (Photo B) when compared to a similar stock photo (Photo A)



When given the choice, the majority of consumers chose the user-generated image (Photo B) as:



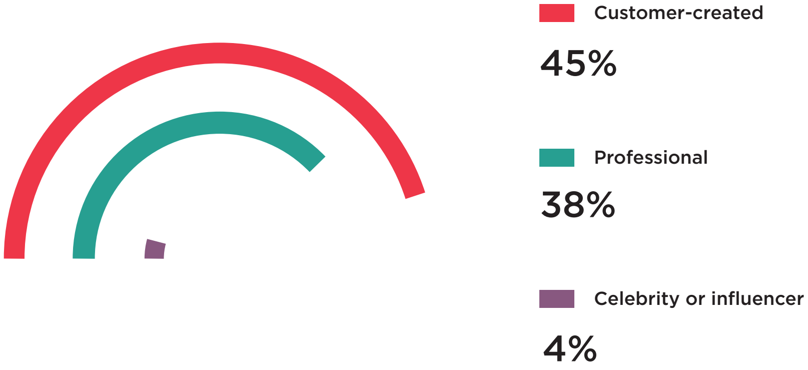
Visuals Fuel Automotive Purchases

Shifts in the car buying process

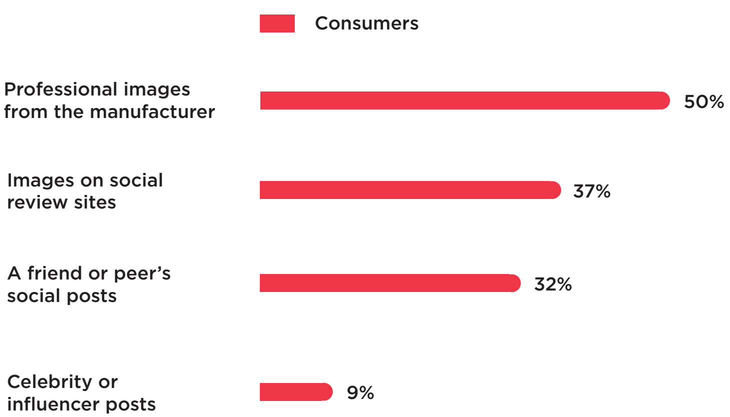
Buying a car used to mean spending hours visiting local dealerships, but the internet has changed the game. Consumers now look to and are influenced by the authentic user-generated visuals that 62% of people say they would be likely to share online about buying or leasing a new vehicle.

When researching cars online, consumers are still more likely to reference images from manufacturers or dealers than content from any other source. Yet, the influence of consumer-created images is growing, with 45% of people saying content from friends, family or other consumers was the most influential in helping them decide which car to purchase.

The most influential content to consumers when purchasing a car



Which types of content do you reference when deciding to purchase a new car?



62%

of people say they'd be likely to **post a photo or video** of a **positive** car buying or leasing **experience**

45%

of people say **consumer-created visuals** are the **most influential** in helping them decide which car to purchase

Visuals Fuel Automotive Purchases

Putting consumers to the test

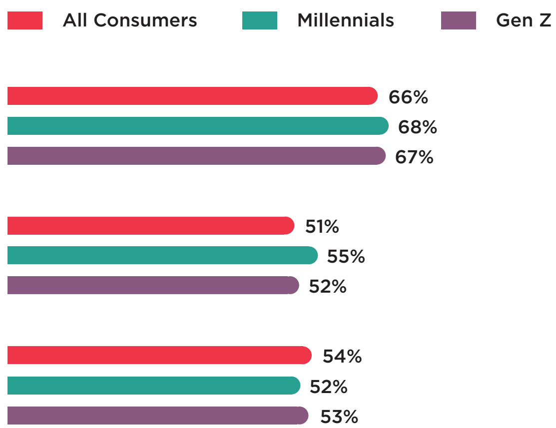
We showed consumers two side by side photos of vehicle: one was a brand-created image and the other was user-generated.

Given the choice between the two images, the majority of people said the user-generated image (Photo A) was the most authentic, more likely to make them trust the brand that posted it and the most likely to be the image they would click on if both were featured in an ad or social post.

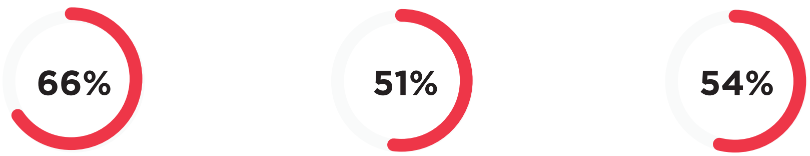
Photo A: Brand Photo

Photo B: UGC

Consumers' sentiments about the automotive UGC (photo B) when compared to a similar stock photo (Photo A)



When given the choice, the majority of consumers chose the user-generated image (Photo B) as:



Most authentic

Most likely to make them trust the brand that posted it

Most likely to click on if both were featured in an ad or social post

UGC Drives CPG Purchases

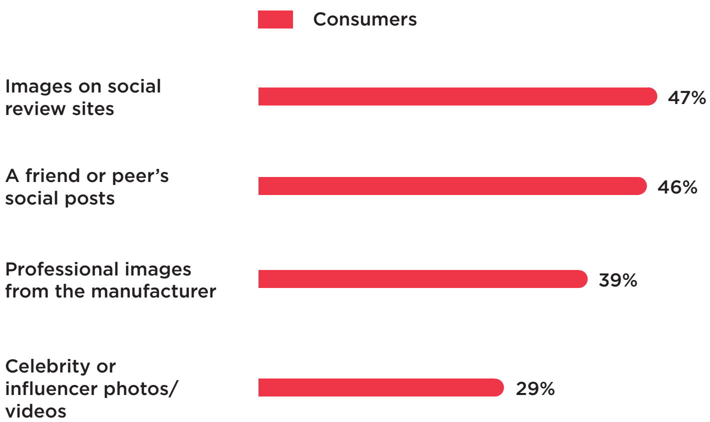
The New Face of Consumer Packaged Goods (CPG)

Consumers have always considered word-of-mouth recommendations the most credible source of product advertising. Today, user-generated content has become word-of-mouth for the digital age.

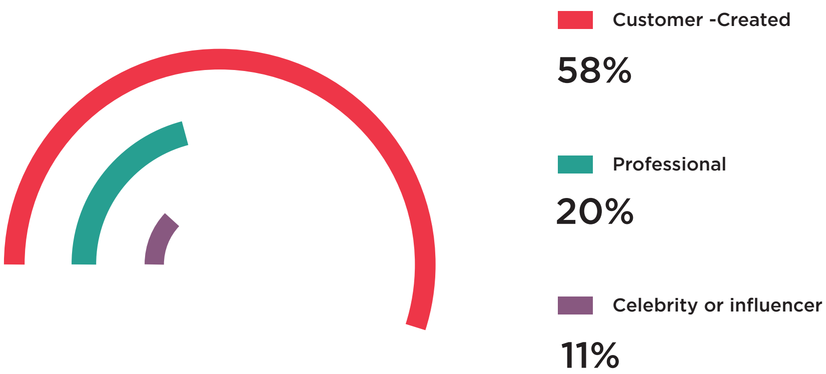
Most people now seek out and are influenced by authentic consumer-created visuals, with 47% saying they reference consumer images on social review sites and 46% saying they look to friends' and peers' social photos when deciding which beauty, health or wellness products to purchase.

And UGC isn't just the type of visual content consumers prefer to reference in their product searches, it's also the most influential.

What content do you reference when deciding which beauty, health or wellness product to purchase?



The most influential content to consumers when purchasing beauty, health or wellness products:



In fact, 58% of people say content from friends, family or other consumers is the most influential when purchasing beauty, health or wellness products — while only 11% of people said influencer content was the most influential.

Consumers are putting their money where the UGC is, with 54% of people saying they've purchased a consumer packaged good based on a social image from friends, family or peers.

54% of people have **purchased** a consumer packaged good **based on an image or video** they saw from **friends, family or peers on social media**

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UGC Drives CPG Purchases

Once they've made their purchases, consumers are continuing the cycle of authentic influence with 65% saying they'd post about a positive health or beauty product experience and 71% saying they'd post about a positive clothing or accessories purchase.

Putting consumers to the test

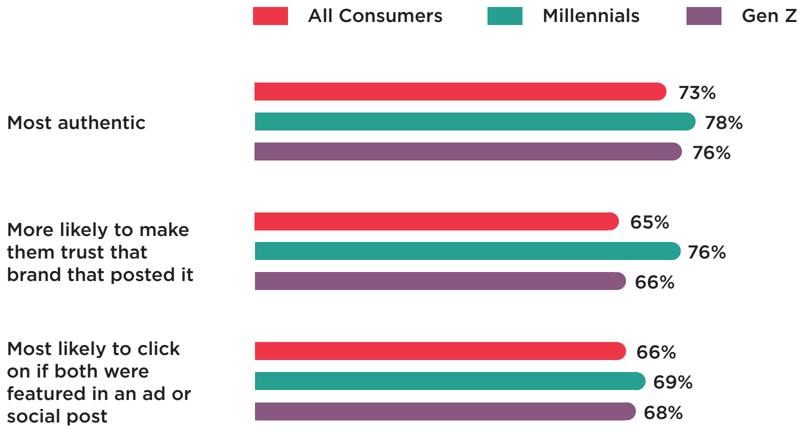
We showed consumers two side by side photos of a woman wearing a beauty mask: one was a stock photo and the other was a user-generated image.

Given the choice between the two images, most people said the UGC image (Photo B) was the most authentic, more likely to make them trust the brand that posted it and most likely to be the image they would click on if both were featured in an ad or social post.

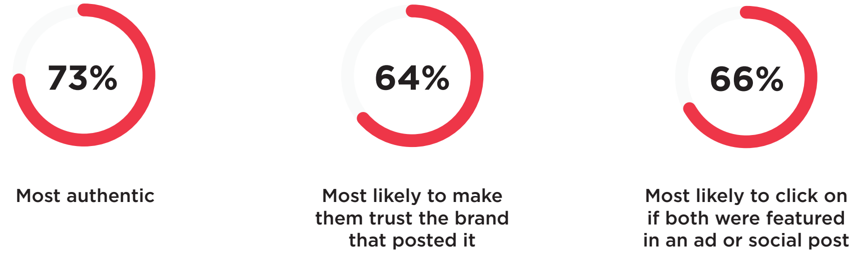
Photo A: Stock Photography

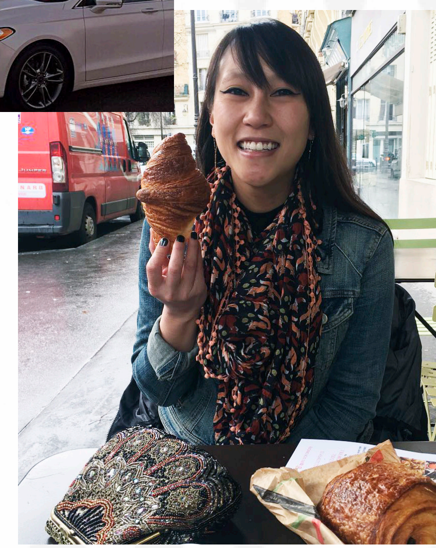
Photo B: UGC

Consumers' sentiments about the CPG UGC (Photo A) when compared to a similar stock photo (Photo B):



When given the choice, the majority of consumers chose the user-generated image (Photo B) as:





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THE VOLUME & VALUE OF VISUALS

Marketers

67%

of **marketers** say they plan to **increase** their use of **brand-created visuals**

– VS –

Consumers

15%

of **consumers** say **brand-created visuals** are the type of content they **most want to see from brands**

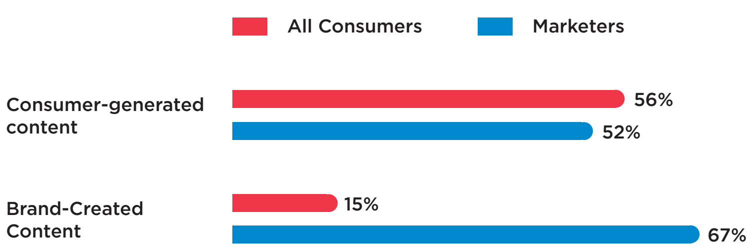
Consumers Create the Content They Want from Brands

We've established that people are regularly referencing, creating and influenced by user-generated content in their everyday lives — whether they're booking travel, going out to eat, purchasing a car or buying a personal care product. So naturally, these kind of authentic visuals are also what people most prefer to see from brands.

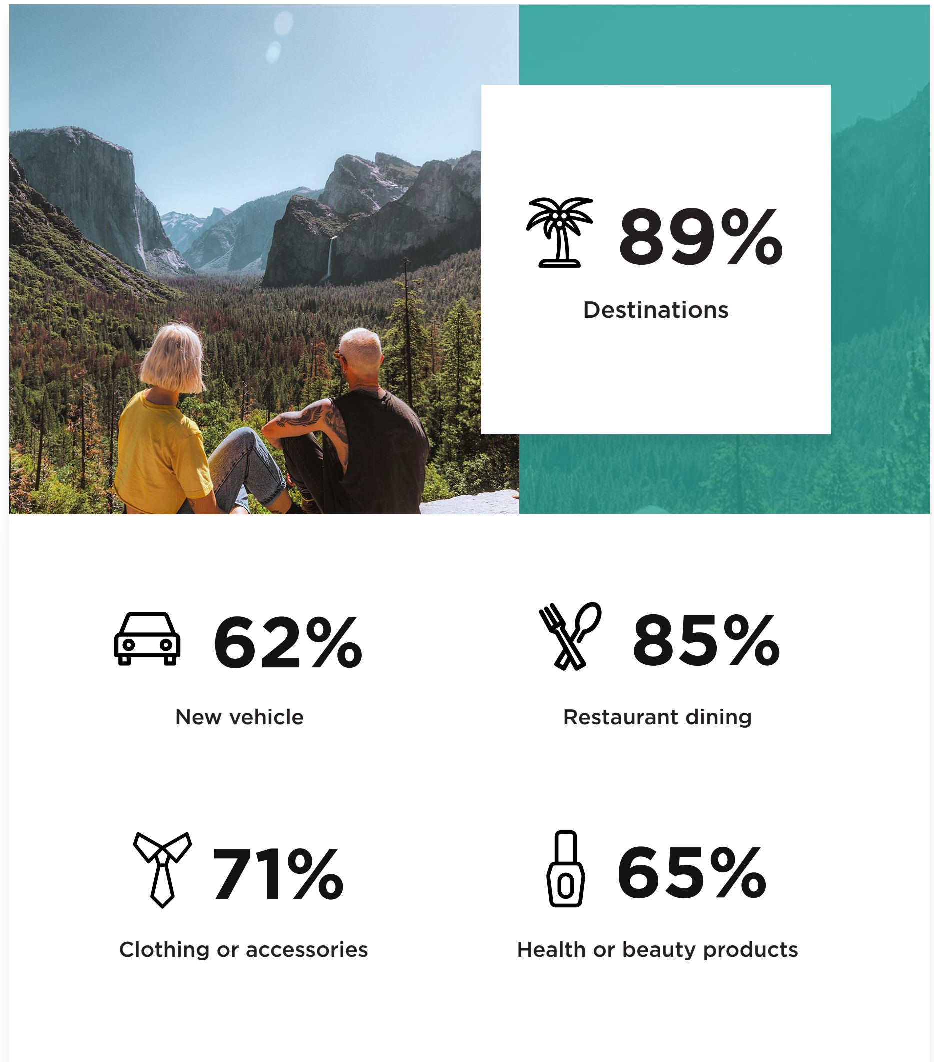
Half of consumers prefer to view or interact with photos when discovering new products and brands, and 44% prefer photos when engaging with a brand on social media.

Additionally, the majority of consumers (56%) most want to see user-generated photos and videos from the brands they support. Although 52% of marketers on average plan to increase their usage of UGC in 2019, brand-created images and videos remain the most popular type of content marketers plan on investing in in 2019, with 67% of marketers on average planning to increase their use of branded content even though only 15% of consumers say it's the type of content they most want to see.

The type of content consumers want vs types of content marketers are planning to increase usage of in 2019:



Percentage of people who would post about positive experiences:



Consumers Create the Content They Want from Brands

Meanwhile, most consumers said they'd be likely to grant a brand permission to use an image or video they had posted on social media of a recent trip (55%), recent restaurant experience (62%), new vehicle (51%) or new piece of clothing or personal product (59%) — offering marketers an abundant, authentic and freely available source of influential visual content.

Not only does this vast quantity of consumer-created content have the potential to feed marketers' multi-channel activities, but it can also help boost customer loyalty by directly recognizing and praising brands' most active and enthusiastic customers. In fact, 51% of consumers said they'd be more likely to continue engaging with and/or purchasing from a brand if it shared their photo, video or social post across its marketing.

51%

of consumers say they'd be **more likely to continue engaging with** and/or **purchasing from a brand** if it shared their photo, video or social post across its marketing

Percentage of people who would grant a brand permission to use an image or video they posted about a recent:

55%
Destination experience

51%
New vehicle

62%
Restaurant dining experience

59%
Clothing or personal product purchase

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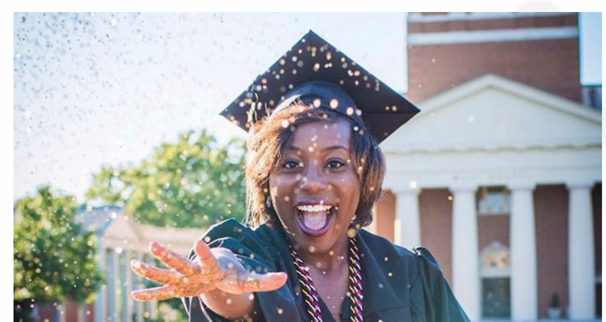
PRIORITIZING PERSONALIZATION

Marketers		Consumers
92% of **marketers believe** their **brands deliver personalized experiences** to customers	– VS –	**55%** of **consumers** either **disagree** or are ambivalent about whether the majority of **brands provide personalized experiences**



Marketers Aren't Personalizing As Well As They Think

In addition to wanting brands to share user-generated content, consumers expect brands to personalize their interactions, with 67% of people (73% of Gen Z and 70% of Millennials) saying it's important for brands to provide them with personalized experiences. However, only 29% of marketers say creating personalized customer experiences is a top priority for them in 2019. How could this be? As it turns out, most marketers believe they're already producing the personalization customers seek.

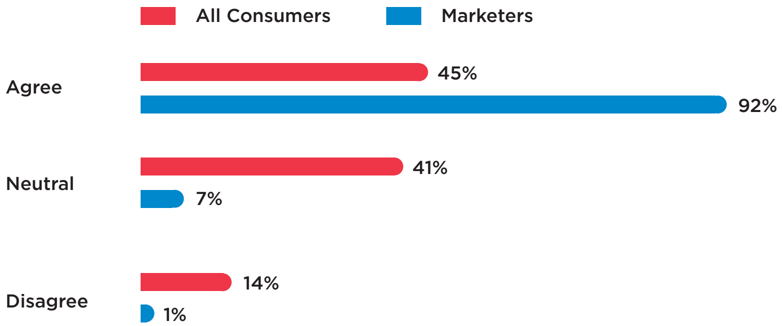
A whopping 92% of marketers believe their brands deliver personalized experiences to customers. While 45% of consumers agreed that the majority of brands they interact with provide personalized experiences, 14% flatly disagreed and another 41% neither agreed nor disagreed — making it clear there is still plenty of room for marketers to improve the level of personalization they provide consumers.

On which channels are marketers currently providing personalized content experiences? Today, marketers say they are personalizing customer experiences on organic (71%) and paid (58%) social, display advertising (47%) and email (46%).

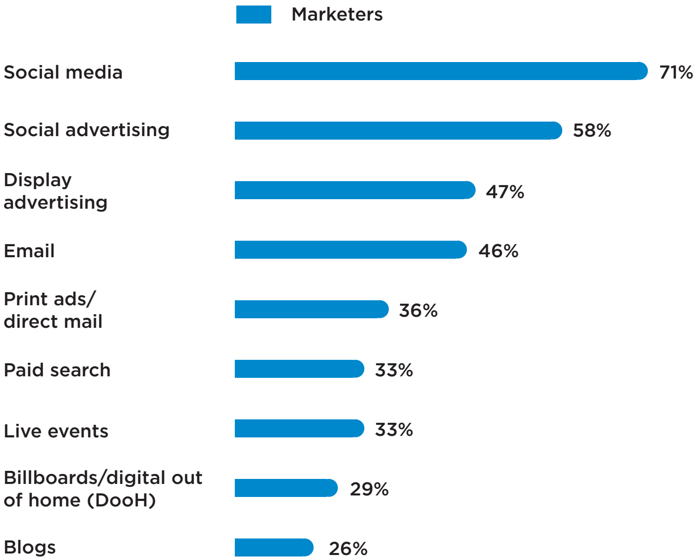
67%

of **consumers** say it's important for **brands** to provide them with **personalized experiences**

Do(es) your brand / the majority of brands deliver personalized customer experiences?



Marketers are currently personalizing content experiences on the following channels:



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Lack of Time & Content Hinder Personalization

We also sought to understand what's preventing, or at least slowing, marketers' ability to personalize their customers' experiences. Marketers said time and resources (35%), sourcing enough content (30%) and budgets (20%) are the biggest hurdles to effectively delivering personalized customer experiences.

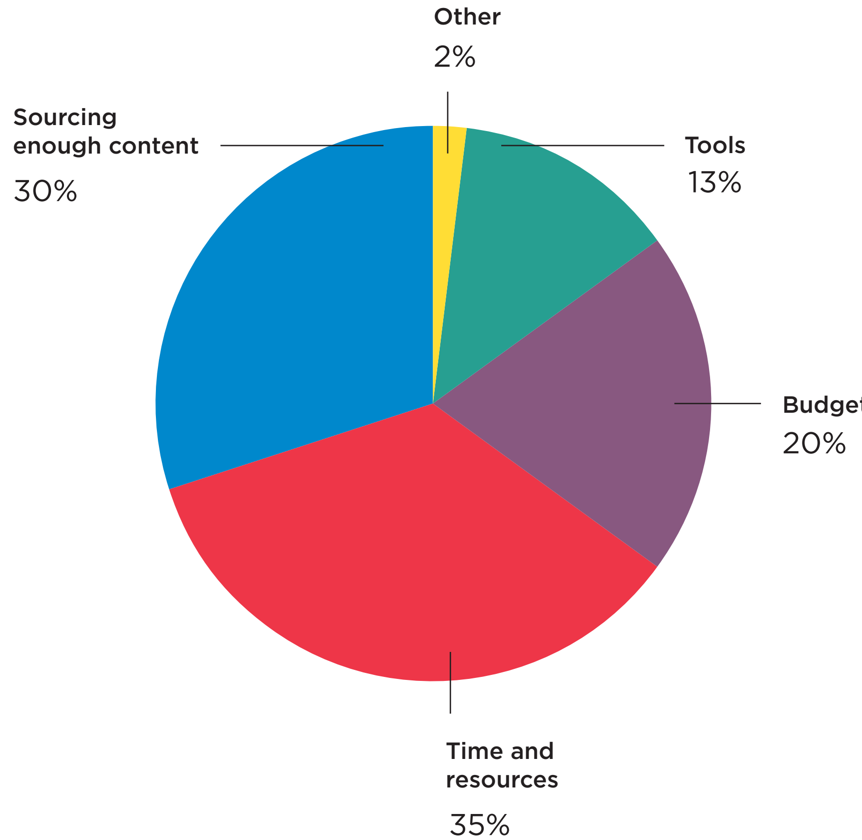
Although only 13% of marketers cited tools as a hurdle to providing personalization, 57% are planning to increase their investment in personalization tools in 2019.

Personalization also contributes to the pressure 63% of marketers feel to continually produce greater amounts of content at a higher frequency, with 43% of marketers saying growing consumer segmentation and personalization is the biggest driver of increasing content demands.

63%

of **marketers** feel pressure to continually produce **greater amounts of content** at a higher frequency

What is the biggest hurdle to effectively delivering personalized content experiences?



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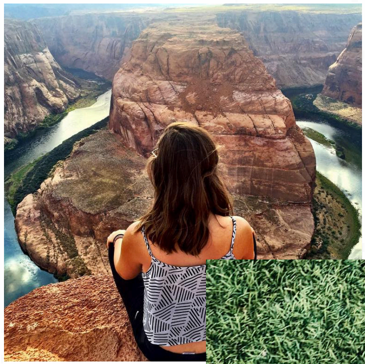
MODERN MARKETING CONTENT CHALLENGES

63% of **marketers** said they feel pressure to **continually produce greater amounts of content** at a **higher frequency**



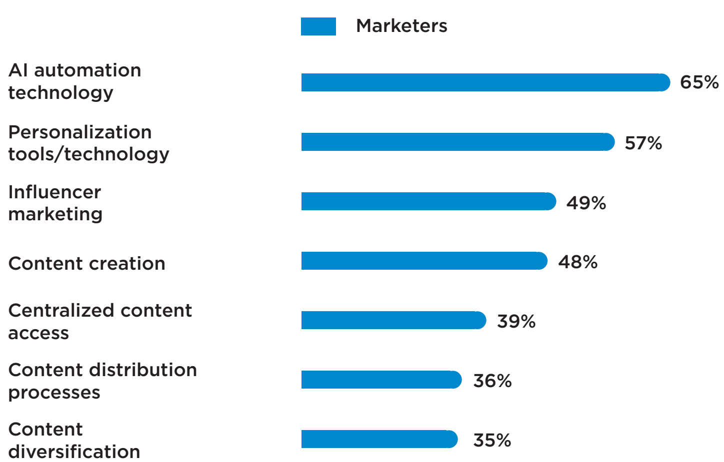
Measurement, Management & Production

When it comes to content, what are marketers trying to achieve? We asked what their top three content marketing goals were for 2019. Growing brand awareness (53%), increasing sales revenue (45%) and boosting customer engagement (38%) topped marketers' lists, with bolstering customer loyalty/retention (34%) closely following.

To help fulfill these goals, marketers are planning to increase their investment in strategic initiatives like AI automation (65%), personalization tools (57%), influencer marketing (49%) and content creation (48%).

But what are the greatest challenges they must overcome to be successful in the new year? The majority of marketers said measuring content efficacy (60%), effectively managing content (57%) and producing or sourcing enough engaging visuals (50%) were their top three content challenges.

Strategic initiatives marketers are planning to increase investment in in 2019:



However, it's not simply the management and sourcing of engaging visuals that concern marketers; it's the ever increasing pressure on them to deliver more visuals at a faster pace. As we mentioned in the last section, 63% of marketers said they feel pressure to continually produce greater amounts of content at a higher frequency.

In marketers' eyes, the biggest drivers behind these increasing content demands are growing consumer segmentation/personalization (43%), greater demand from consumers to constantly have fresh content (30%) and the increased number of consumer touchpoints (25%).

What are your top three content marketing goals for 2019?

What are your top three content challenges?

More Touchpoints Require More Content

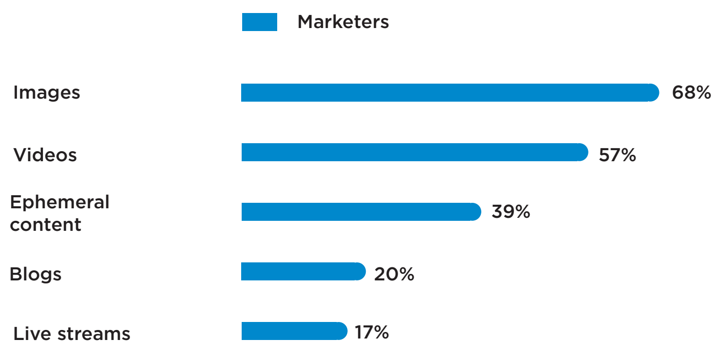
Since the growing number of consumer touchpoints are a driving cause of increased content demands, we took a deeper look at which channels marketers are currently leveraging as well as the channels they're planning to increase their investment in this year.

Unsurprisingly, over 40% of marketers are leveraging all of today's main consumer touchpoints, with organic social (80%), social advertising (73%) and display advertising (73%) being revealed as both the channels consumer marketers currently use most and the ones most marketers are planning to increase their investment in in 2019.

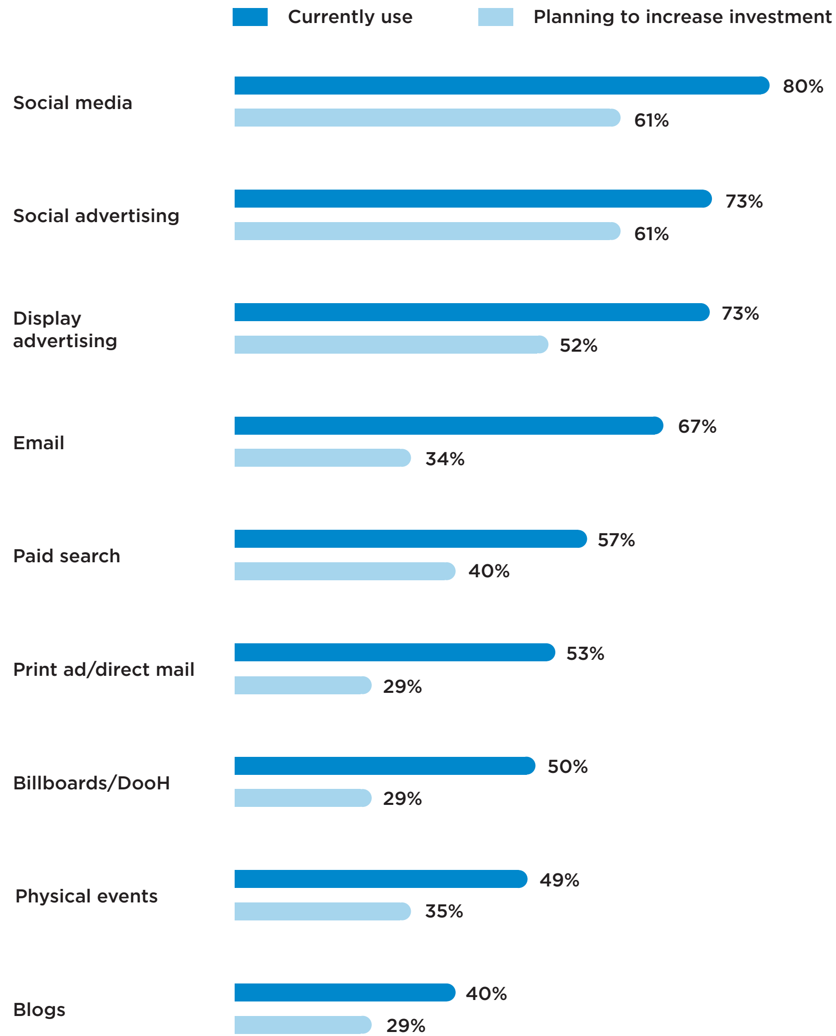
Exactly what content do marketers plan on using across all those channels? Which type of content do they believe is the most important for their brands? In a word: visuals.

Sixty-eight percent of marketers say images are the most important type of content, closely followed by videos (57%) and ephemeral content (39%), with written blog trailing behind at 20%.

What is the most important type of content for your brand?



Channels marketers are currently leveraging and planning to increase their investment in:



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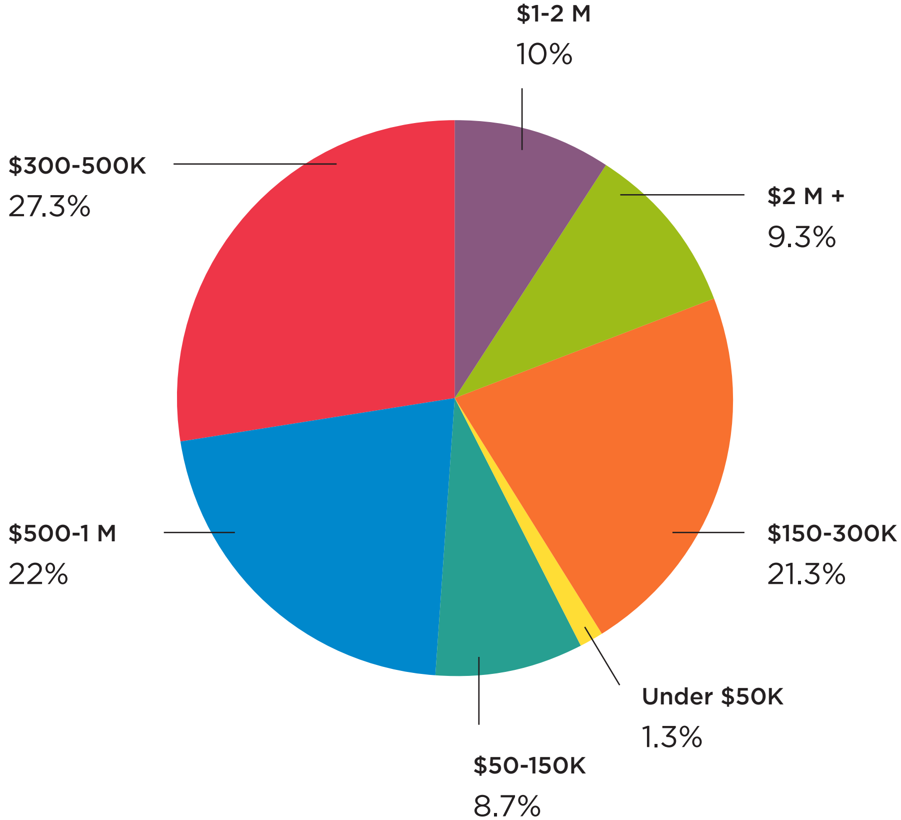
The High Cost of Content

Today, marketers are predominantly getting their content from a mix of sources — both internal and external. Sixty-seven percent of marketers always or very regularly use internal design and creative teams to create visual content for their brand, as well as marketing agencies (57%), in-house photography (53%), user-generated content (45%) and stock photography (41%). And most marketers are planning to either increase or maintain the same usage of all of those content sources over the next 12 months, with the exception of stock photography for which 19% of marketers said they plan to reduce their usage.

This reliance on expensive and resource-intensive content sources can go a long way towards explaining the high cost of annual content creation. Over 19% of B2C marketers spend an average of over $1 million on content annually, 41% spend over $500,000 and 69% spend north of $300,000 per year.

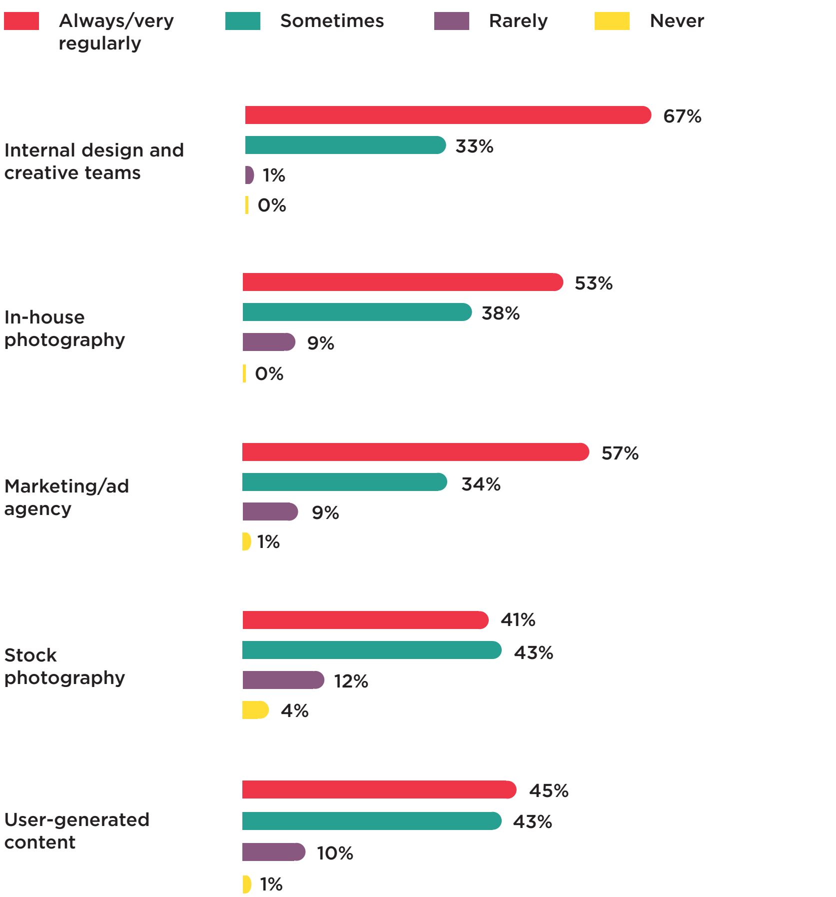
How much marketers spend on average for content per year:



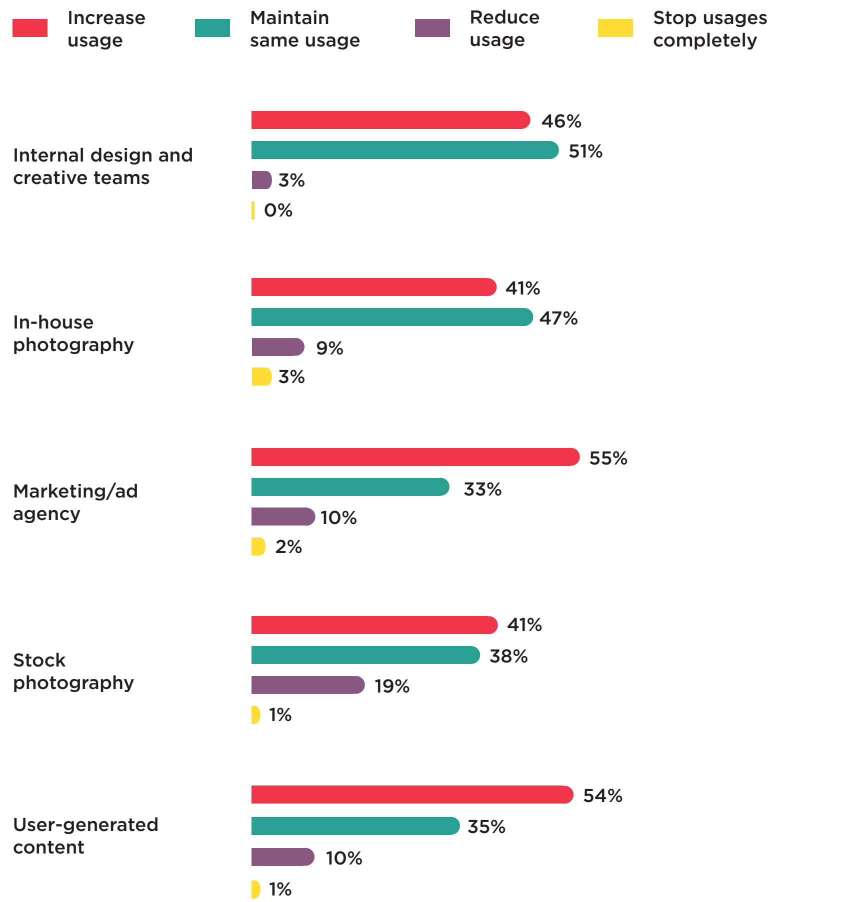
MODERN MARKETING CONTENT CHALLENGES

Sourcing Visuals is a Complex Mix For Marketers

How frequently marketers use each of the following methods to create and/or source visual content for their brand:



Marketers are planning to make the following changes to their current visual content creation and/or sourcing methods in the next 12 months:



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CONCLUSION

What Marketers Can Do To Bridge The Content Gap

To break through in today's cluttered digital landscape, consumers and marketers agree authenticity, personalization and visuals are of great and growing importance. Yet, the significant disconnect this study has revealed between consumers' and marketers' views on which types of content are most sought after, authentic and influential should be a warning sign for B2C marketers across industries.

Marketers believe authenticity is the most important component of effective content, yet the content they perceive to be most authentic — brand-created content — is not the content the people they're trying to reach view as most genuine. Consumers are 2.4x more likely to say user-generated content is authentic compared to brand-created content, while marketers are 2.1x more likely to say brand-created content is authentic compared to UGC.

This false belief in the perceived authenticity of branded content explains the additional misconception marketers have that most or all of their brand content is effective when, in fact, 51% of consumers believe that less than half of brands create content that resonates as authentic and a mere 13% say brand-created content impacts their purchasing decisions. Building strategic plans off of these misperceptions, 67% of marketers will increase their use of branded content in 2019, even though only 15% of people say that's the type of content they most want to see.

Similarly, a very small (and decreasing) number of consumers say their purchasing decisions are impacted by influencer content. Still, nearly half of marketers plan to increase their investment in influencer marketing this year. And marketers' confidence in the level of personalization they're providing consumers has also proven to be overstated, according to the people we surveyed.

In order to bridge these glaring gaps in perception, marketers need to take note of what global consumers have repeatedly declared throughout this report: all content is not created equal. The authenticity and influence of user-generated content is unmatched, and UGC visuals are the most craved and created by consumers.

Not only would it benefit marketers to prioritize their use of the consumer-created visuals people seek, but the sheer abundance of these freely available visuals have the immense potential to lower the high costs most brands currently pay for content while also solving one of their greatest content and personalization challenges: producing enough engaging visuals at a fast enough frequency.

With the overwhelming majority of consumers now seeking, trusting, posting and acting on consumer-created content, it's clear brands can no longer simply rely on staged, stock and influencer images to break through the noise and establish meaningful connections with today's consumers who increasingly crave authentic and personalization.

Methodology

Online surveys were conducted via market research firm Infosurv (commissioned by Stackla) and their sampling partners. In order to participate in each of the surveys, respondents had to meet the following criteria:

Consumer Survey Criteria

- Live in the United States, United Kingdom or Australia
- Be between 18 to 55 years old
- Use social media (browse or post) at least once a week

Marketer Survey Criteria

- Live in the United States, United Kingdom or Australia
- Work full-time in a senior marketing role (Marketing Manager or higher)
- Work for an automotive, consumer packaged good (CPG), retail or travel and hospitality brand
- Annual company revenue of at least $20 million
- Company size of 100 or more employees (50 or more employees was accepted so long as revenue size was met)

The surveys were conducted from December 14, 2018 through January 2, 2019 for the consumer survey and January 24, 2019 for the marketing survey. In total, we received 1,590 valid consumer respondents — with 1,002 from the U.S, 295 from the UK and 293 from Australia — and 150 valid marketer respondents — with 89 from the U.S., 41 from the UK and 20 from Australia.

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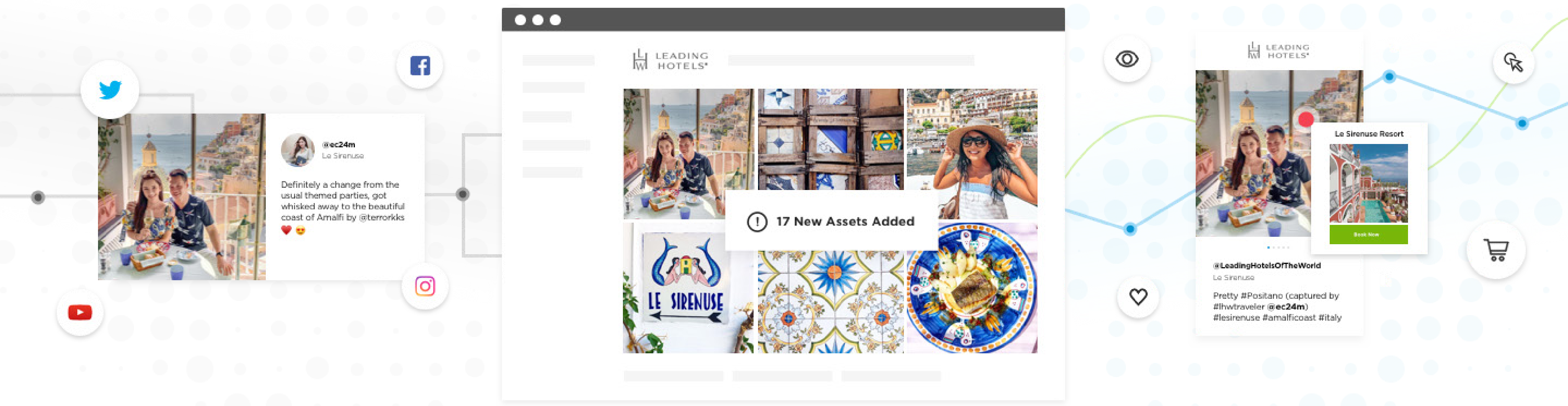
ABOUT STACKLA

The World’s Smartest Visual Content Engine



Visuals have become vital to modern marketing, but they’re notoriously difficult and costly for brands to create at scale. Instead of wasting tons of time and money creating picture-perfect visuals for all your marketing activities, you could be tapping into the wealth of photos and videos your customers share online everyday.

Stackla is the **world’s smartest visual content platform**, helping marketers **discover, manage** and **publish** the best authentic consumer content across all their marketing touchpoints — from ads and emails to websites and events.

With an **AI-powered user-generated content (UGC) platform** and **asset manager**, Stackla sits at the core of the marketing stack, enabling brands to build a rich library of visual content by actively discovering, recommending and rights managing content from across the social web to fuel personalized content experiences at scale.

Want to learn more? **Visit stackla.com to request a personalized demo.**