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MEDIA ALERT FINAL

Consistency is King: Adobe reveals only 40% of consumers say brands are doing a good job at providing consistent experiences across devices

- European consumers now own an average of 6.1 connected devices
- 85% of consumers say they switch devices during tasks
- Smartphone traffic grew 36% on average in 2015
- 72% say browsing is worse on a smartphone than on a desktop

LONDON, Adobe Summit EMEA, United Kingdom — May 11, 2016 — Adobe today released the results of its Adobe Digital Index (ADI) *EMEA Best of the Best 2015 Report*, which benchmarks what the average and top companies are doing across a number of metrics by analysing Adobe Marketing Cloud data, and includes insight on the online habits of over 5,000 consumers across Europe. The report found that European consumers now own an average of 6.1 connected devices (6.9 devices amongst 25-34 year olds), and use three of these daily, across multiple operating systems. 85% of us also now switch devices during online tasks. However, the brand experience across devices is not stacking up, with only 40% saying that companies are doing a good job at providing consistent and personalised experiences across devices.

As well as highlighting changing consumer behaviour, the ADI analysis, across the UK, Germany, France, Benelux and Nordics, uses metrics such as smartphone and tablet browsing, visit rate, consumption time and conversion, to establish performance benchmarks. The data shows that smartphone traffic grew on average 36% or more year-on-year for each country, yet the leaders still maintained a wider gap, even with an average growth of 33%. Marketers that don't greatly improve both the mobile and cross-device experience risk falling even farther behind the leaders in their industry.

Tamara Gaffney, Principal Analyst, Adobe Digital Index, says, "Looking at the data, we're seeing some fascinating trends, particularly relating to the consumer journey – people are increasingly switching devices, spending less time on sites and generally moving around a lot more. The reports show just how fragmented today's customer journey is and that there is a major opportunity for brands that focus on delivering consistent, visually appealing and technically perfect experiences across devices."

Dealing with the challenging new world of device switching

The consumer survey reveals the extent to which people use multiple devices to get online, with people saying that they switch devices frequently during tasks such as researching products or services (52%), reading and replying to email (52%), reading and sharing updates on social media (51%), shopping online (48%) and watching online TV/streaming (48%). Desire to see content on a bigger screen is a key driver of such switching (36%), while other drivers are under more direct marketer control (better usability/user experience (26%). When it comes to finding what they want efficiently, consumers see a real gap: 72% say browsing is worse on a smartphone than on a desktop/laptop. ADI benchmarks back this up. While desktop visits still dominate - averaging 64% of all visits – traffic share has eroded by an average of 8%.

"Consumers have more connected devices than ever before, but the fact that people are now switching devices during tasks could be an indication that the experience between devices is inconsistent and leading to frustration," Gaffney continues. "This is a huge challenge, with smartphone traffic increasing significantly year-on-year, marketers need to focus on optimising for mobile, while not forgetting the desktop experience consumers will continue to rely on, even in a mobile world."

Delivering visually appealing, great content fast

ADI data shows that there are fewer repeat visits and that people are spending less time on sites. The gap between the Best-of-the-Best and the average also seems to be narrowing across these two metrics.

From a consumer perspective, great online experiences are built around visuals, with 54% of Europeans citing visual appeal as a key contributor to a positive experience on websites (46% for a mobile app). Ads are still a problem for many users, with 40% stating the absence of ads is a positive on websites and 43% on apps. The biggest frustrations for consumers on mobile devices are speed and small screen size (49% and 45% respectively). However, there appears to be a trend toward larger screens with over a quarter of consumers (27%) now using smartphones with a 5-inch or greater screen, rising to nearly one-third (32%) of men and 18-24 year olds owning these so-called phablets.

"On the mobile side, we tend naturally to carry out shorter tasks which take less time," notes Gaffney, "but the sheer volume of choice means that brands are fighting an ongoing battle to get and keep attention. If experiences aren't up to scratch, consumers move on. In this world of changing habits, brands need to better understand their customers and at a much more granular level. It's about combining great content and data insights to provide a consistent and more personal experience in order to stand out."

New tools, techniques and platforms to delight customers

Tasks that are most likely to be completed using only a mobile device are email (24%), getting directions/using maps (24%) and social media (17%). For the 18-24-year-old age group, watching online video content (23%) came out as a top three mobile-only task. Looking ahead, 21% of European consumers think it will be important to be able to do their banking and investing exclusively on a mobile device in the near future, which is something that those in financial services need to prepare for.

Finally, with the consumer technology landscape changing rapidly, brands need to start thinking about the new platforms that will take the end user experience to the next level. Most notably, 32% of European consumers want to see more virtual reality (VR) from brands and 30% want to see more location-based offers on their mobile devices.

"Instead of seeing problems with today's device switching and fragmented consumer journeys, brands need to understand that the marketing landscape is changing all the time, with multiple new opportunities, tools and techniques to delight customers on mobile, on desktop and on exciting and emerging new platforms such as VR," concludes Gaffney.

Adobe Digital Index: Best of the Best Methodology

The Best of the Best 2015 report refers to companies using the Adobe Marketing Cloud who rank in the Top 20% of fellow Adobe clients in their industry on various key performance metrics. It is called the Best of the Best because Adobe Marketing Cloud customers are already ahead of the masses through their investment in excellence.

The ADI consists of aggregated and anonymous data from 200 billion visits to 10,000+ U.S. websites, 100 billion visits to 3,000+ websites in Europe, and 100 billion visits to 3,000+ websites in Asia during the 2015 calendar year gathered via Adobe Analytics and Adobe Social. Country averages are based on the industries analysed.

Consumer Research Methodology

Between March 30-April 4, we talked to over 1000 consumers in each of the five EMEA countries (UK, France, Germany, Sweden, and the Netherlands) about what devices they own and how they use these devices throughout their daily activities. We also touched on topics such as social media use and what drives their mobile behaviour, to better understand the trends we see in the Best of the Best data.