



The State of Digital Downloads

The State of Digital Downloads is Limelight Networks' latest in a series of annual surveys that explores consumer perceptions and behaviors around digital content and preferences about how to download and consume it.

WHITE PAPER

The State of Digital Downloads

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The State of Digital Downloads

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The State of Digital Downloads is Limelight Networks' latest in a series of annual surveys that explores consumer perceptions and behaviors around digital content and preferences about how to download and consume it.

The survey report, conducted in May 2015, is based on responses that Limelight Networks received from 1,030 consumers ranging in demographics, gender, and education. Key findings from the survey include:

- Devices, and the people that use them, are “always on” for downloading digital content.
- The smartphone is the gateway to engaging with Millennials.
- The hunger for digital content is growing, especially amongst Millennials.
- Apps, operating systems for mobile phones, and music are the most popular and frequently downloaded content.
- The key to a great download experience for Millennials is to make it seamless and consistent.
- There's a “golden time” for engaging digitally with Millennials.

Additional findings include:

- When it comes to digital content, everyone is downloading apps.
- Google is beginning to exert its dominance as the destination for digital content.
- For consumers, device maintenance is all about staying in control.
- The ISP is the new villain of the digital age.
- Millennials are the demographic that is most comfortable with downloading pirated content.
- In the mobile device ecosystem, Android is pulling ahead.

Introduction

The way we interact with the world is transforming, thanks to the devices we use every day—tablets, smartphones, computers, and gaming consoles. No longer do we look to analog sources of information and entertainment. We are increasingly beholden to a blossoming digital world through which we acquire information, express ourselves, and interact with each other. The result is a growing relationship with those devices. From sun-up to sundown, they keep us connected to the digital content and applications that have begun to define our lives.

Yet, those devices need support. They need care and maintenance, and our relationship deepens with these devices as we tend to them. In a seemingly endless cycle, the software we install on our devices needs to be updated and upgraded. This constant attention consumers lavish on their devices identifies the devices as “gateways:” the primary mechanisms through which consumers engage with the digital world. As such, organizations must pay particular attention to the behaviors consumers exhibit with these devices if they have any hope of capturing attention and generating interaction.

This study is a first attempt to look at the relationship to the electronics with which consumers surround themselves and understand the user behavior of consuming content through them.

The State of Digital Downloads

Devices, and the People That Use Them, Are “Always On” For Downloading Digital Content

Although the energy cost implications of keeping devices plugged in at all times may be billions of dollars annually¹, it doesn't deter consumers from doing so because they interact with the world through those devices. Even though the devices themselves might have an off switch, our research indicates that their users do not. Whether it's new applications, software patches, or device updates, that consumers are using their devices from sun-up to sundown to consume digital content, as illustrated in Figure 1.

	Morning (6am-12pm) ▾	Afternoon (12pm-6pm) ▾	Nighttime (6pm-12am) ▾	Overnight (12am-6am) ▾	Never ▾
▾ Movies/TV shows	7.69% 78	16.77% 170	39.35% 399	5.82% 59	30.37% 308
▾ Video games/game updates	6.80% 69	20.81% 211	35.01% 355	5.72% 58	31.66% 321
▾ Updates to my phone's operating system	13.99% 141	23.81% 240	35.32% 356	9.23% 93	17.66% 178
▾ New apps/updates to apps	14.33% 146	27.58% 281	37.49% 382	8.05% 82	12.56% 128
▾ E-books	5.56% 56	15.67% 158	28.77% 290	4.17% 42	45.83% 462
▾ Music	7.50% 76	22.51% 228	40.38% 409	5.63% 57	23.99% 243
▾ Newspaper/magazines	12.08% 122	13.66% 138	20.50% 207	4.55% 46	49.21% 497

Figure 1: What Time of Day Do You Most Often Download Different Kinds of Content? (All Respondents)

This is powerful data for any organization delivering digital content—your target market is available for engagement all hours of the day.

The Smartphone Is the Gateway for Engaging with Millennials

Despite the growing proclivity of the younger generations to utilize multiple devices for consuming digital content like online video², the mobile phone is clearly the dominant device amongst Millennials.

	Most Often ▾	Frequently ▾	Rarely ▾	Never ▾	Weighted Average ▾
▾ My cell phone	41.36% 438	28.71% 304	13.88% 147	16.05% 170	2.05
▾ A tablet	17.28% 183	33.05% 350	16.90% 179	32.77% 347	2.65
▾ Personal computer	39.28% 416	32.58% 345	19.92% 211	8.22% 87	1.97
▾ Video game console	7.84% 83	15.39% 163	16.62% 176	60.15% 637	3.29
▾ E-book reader	5.10% 54	15.39% 163	15.58% 165	63.93% 677	3.38

Figure 2: To What Type of Device Do You Most Often Download Content? (All Respondents)

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	Most Often ▾	Frequently ▾	Rarely ▾	Never ▾	Weighted Average ▾
My cell phone	57.85% 199	27.33% 94	9.01% 31	5.81% 20	1.63
A tablet	17.73% 61	34.01% 117	18.02% 62	30.23% 104	2.61
Personal computer	36.63% 126	36.05% 124	18.31% 63	9.01% 31	2.00
Video game console	14.83% 51	20.35% 70	19.19% 66	45.64% 157	2.96
E-book reader	5.81% 20	15.70% 54	17.15% 59	61.34% 211	3.34

Figure 3: To What Type of Device Do You Most Often Download Content? (Millennials)

The data behind Figure 2 and Figure 3 is very telling. As indicated in Figure 3, 58 percent of Millennials indicated they use a cell phone “most often” while only 37% indicated they use a personal computer “most often.” This is compared to all respondents (Figure 2), in which 42% indicated they use a cell phone “most often” and 39% indicated they use a personal computer “most often.” This growing dominance of the mobile phone as the go-to device for digital content consumption amongst Millennials is a clear indicator to organizations—put mobile phones first, or potentially miss out on engaging with this powerful demographic.

The Hunger for Digital Content Is Growing, Especially Amongst Millennials

Demand for digital content is growing. As Figure 4 illustrates, the majority of respondents indicated they are more likely to download digital content than they were a year ago, even if only slightly. And yet, when the data is filtered for just Millennials, a much more interesting picture emerges—in Figure 5, we see a drastic increase in the response, “I am more likely to download content” and an almost equal reduction in the response, “I download the same amount of content.”

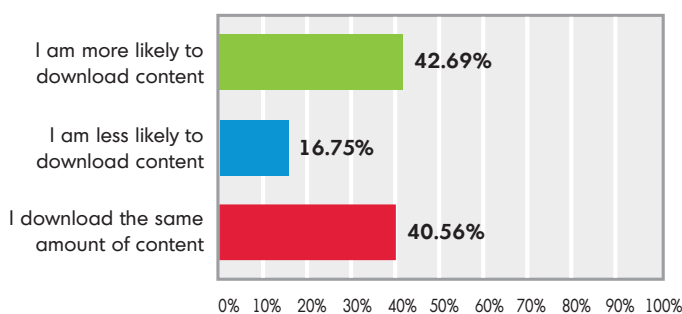


Figure 4: Are You More or Less Likely to Download Content Than You Were a Year Ago? (All Respondents)

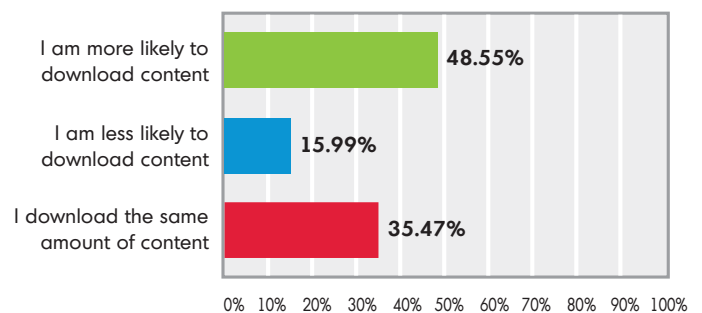


Figure 5: Are You More or Less Likely to Download Content Than You Were a Year Ago? (Millennials)

The State of Digital Downloads

It's clear from the data that Millennials are apt to consume a significant amount of digital content over the coming years. And what kind of content should you provide them? Based on the findings in Figure 6, they want long-form video content (movies/TV shows)³, video games/updates, and applications/updates.

	Automatically ▾	Daily ▾	Once a week ▾	Once a month ▾	2-3 times a year ▾	Never ▾
▾ Movies/TV shows	13.73% 46	14.93% 50	22.69% 76	12.84% 43	12.24% 41	23.58% 79
▾ Video games/game updates	22.35% 76	13.53% 46	16.47% 56	22.35% 76	9.12% 31	16.18% 55
▾ Updates to my phone's operating system	33.92% 115	8.85% 30	12.39% 42	19.47% 66	18.88% 64	6.49% 22
▾ New apps/updates to apps	30.21% 103	15.25% 52	25.22% 86	17.60% 60	6.74% 23	4.99% 17
▾ E-books	5.64% 19	9.50% 32	16.62% 56	13.06% 44	15.43% 52	39.76% 134
▾ Music	10.98% 37	15.73% 53	25.82% 87	20.77% 70	11.87% 40	14.84% 50
▾ Newspaper/magazines	8.01% 27	11.57% 39	12.17% 41	8.01% 27	13.35% 45	46.88% 158

Figure 6: What Types of Content Do You Download Most Often? (Millennials)

Apps, Operating Systems for Mobile Phones, and Music Are the Most Popular and Frequently Downloaded Content

Although consumers are downloading digital content across the board at all times during the day, Figure 7 illustrates that new apps and app updates are the primary category of content with only 12% “never” downloading them at all.

	Automatically ▾	Daily ▾	Once a week ▾	Once a month ▾	2-3 times a year ▾	Never ▾
▾ Movies/TV shows	9.10% 91	11.50% 115	20.90% 20	12.90% 129	13.20% 132	32.40% 324
▾ Video games/game updates	13.59% 137	9.92% 100	16.47% 16	18.06% 182	11.71% 118	30.26% 305
▾ Updates to my phone's operating system	27.47% 278	7.02% 71	11.26% 11	16.80% 170	19.27% 195	18.18% 184
▾ New apps/updates to apps	24.14% 245	11.43% 116	22.27% 22	20.39% 207	10.05% 102	11.72% 119
▾ E-books	4.76% 48	6.64% 67	12.59% 12	15.66% 158	14.37% 145	45.99% 464
▾ Music	7.08% 72	11.80% 120	21.34% 21	20.55% 209	16.13% 164	23.11% 235
▾ Newspaper/magazines	6.55% 66	10.62% 107	11.21% 11	9.72% 98	11.81% 119	50.10% 505

Figure 7: What Types of Content Do You Download Most Often? (All respondents)

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When this data is correlated against those surveyed that indicated they primarily download content to their cell phones (719 respondents), the number of respondents indicating that they “never” download new apps or app updates decreases to just 3% (Figure 8).

	Automatically ▾	Daily ▾	Once a week ▾	Once a month ▾	2-3 times a year ▾	Never ▾
▾ Movies/TV shows	12.45% 87	12.88% 90	23.75% 166	13.45% 94	12.59% 88	24.89% 174
▾ Video games/game updates	17.45% 123	11.06% 78	20.28% 143	20.14% 142	9.93% 70	21.13% 149
▾ Updates to my phone's operating system	35.57% 254	9.10% 65	13.87% 99	18.63% 133	19.05% 136	3.78% 27
▾ New apps/updates to apps	29.59% 211	14.73% 105	25.53% 182	20.90% 149	5.89% 42	3.37% 24
▾ E-books	5.69% 40	8.25% 58	14.51% 102	16.36% 115	13.51% 95	41.68% 293
▾ Music	9.03% 64	14.53% 103	24.54% 174	21.58% 153	13.96% 99	16.36% 116
▾ Newspaper/magazines	8.92% 63	13.03% 92	13.88% 98	10.20% 72	12.46% 88	41.50% 293

Figure 8: What Types of Content Do You Download Most Often? (All respondents who indicated “always” or “frequently” to “cell phone” when asked “From what type of device do you most often download content?”)

Although we hear much about consumer mobile phone usage, the comparison of Figure 8 to Figure 1 serves to punctuate the idea that the mobile phone is an indispensable tool in everyday life. As our data demonstrates, not only are consumers using the device throughout the day (Figure 1), they are also actively improving it by downloading new and updated applications (Figure 8). This would seem to illustrate that the mobile phone is the device that organizations should target when attempting to engage digital audiences.

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The Key to a Great Download Experience for Millennials—Make It Seamless and Consistent

It's clear that regardless of demographics, people find downloading software frustrating, with 75% of respondents indicating such. What's interesting is that the experience changes depending upon the demographic group of the respondent. For example, as illustrated in Figure 10 and Figure 11, the majority of Baby Boomer and Generation X (Gen X) respondents found it frustrating when the software or update takes too long to download. Although for Generation X respondents, far fewer found it frustrating when the download doesn't work at all.

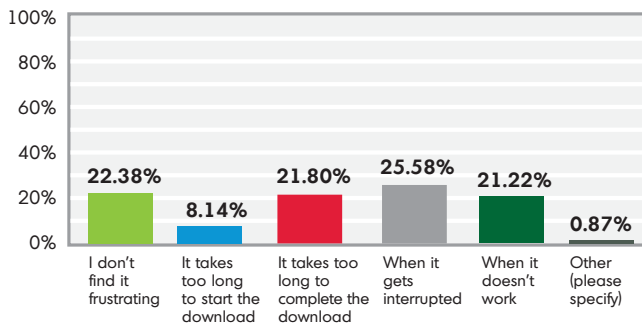


Figure 9: What Is the Most Frustrating Thing About Downloading Content? (Millennials)

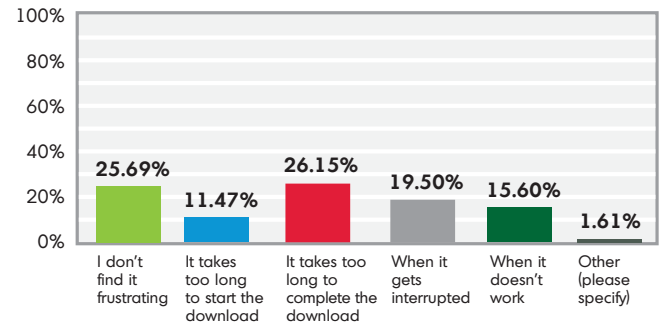


Figure 10: What Is the Most Frustrating Thing About Downloading Content? (Gen X)

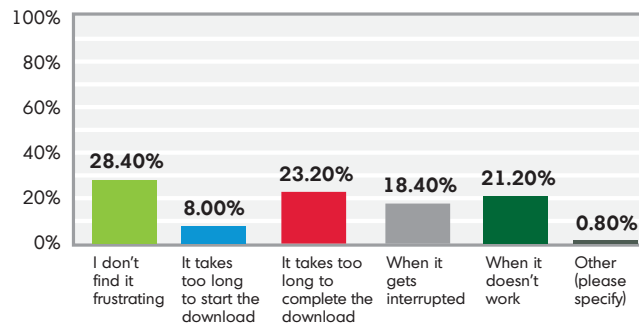


Figure 11: What Is the Most Frustrating Thing About Downloading Content? (Boomers)

Yet interestingly, Figure 9 reveals that for Millennials, the primary point of frustration is when the download is interrupted. This would seem to indicate that software and device companies need to ensure the consistency of download in whatever delivery method they select.

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There's a "Golden Time" For Engaging Digitally with Millennials

If Millennials are consuming more and more digital content, it only makes sense to marry marketing messages and advertising with the distribution of that content. But when is the ideal time to do that? Although one could make the case that it's all the time, Millennials want targeted and personalized ads⁴. Just throwing marketing messages at them has little effect, especially if they aren't paying attention in the first place. But if you have the digital content they want, it's possible that their attention could be directed at you during the time of download or update.

	Morning (6am-12pm) ▾	Afternoon (12pm-6pm) ▾	Nighttime (6pm-12am) ▾	Overnight (12am-6am) ▾	Never ▾	Total ▾
▾ Movies/TV shows	11.21% 38	25.96% 88	33.33% 113	7.08% 24	7.08% 24	22.42% 76
▾ Video games/game updates	8.50% 29	28.45% 97	38.12% 130	7.92% 27	7.92% 27	17.01% 58
▾ Updates to my phone's operating system	12.98% 44	31.86% 108	37.76% 128	10.03% 34	10.03% 34	7.37% 25
▾ New apps/updates to apps	15.00% 51	31.76% 108	37.65% 128	9.12% 31	9.12% 31	6.47% 22
▾ E-books	7.16% 24	20.00% 67	25.97% 87	5.07% 17	5.07% 17	41.79% 140
▾ Music	8.31% 28	26.71% 90	42.14% 142	5.93% 20	5.93% 20	16.91% 57
▾ Newspaper/magazines	10.42% 35	18.15% 61	20.83% 70	5.65% 19	5.65% 19	44.94% 151

Figure 12: What Times of Day Do You Most Often Download Different Kinds of Content? (Millennials)

As revealed in Figure 12, it appears that nighttime (6pm to 12am) is the ideal time to reach and engage with Millennials as that is the time frame during which they are downloading the most content. This highlights an opportunity for organizations to strategically target their marketing campaigns (e.g., new software that is now available, an upcoming paid release, complimentary applications, etc.) when Millennials are most apt to be paying attention. As indicated in Figure 6, only 30% or so of Millennials opt for any form of automation with the content they download, indicating that a huge percentage of downloading/updating is done manually. This data indicates a much more engaged audience.

The State of Digital Downloads

Google Is Beginning to Exert its Dominance as the Destination for Digital Content

There is a war going on over digital content concerning who can provide consumers with the best destination for all their digital content needs. When the digital world began to blossom in the mid 2000s and through the early part of this decade, it was all about Apple. With iTunes (apps, movies, books, TV, music), their device ecosystem (iPhone, iPad, Mac, Apple TV), and arrangements with major content owners, they appeared to be the obvious contender for dominating this content war. But with its Play store (available on all Android devices), and device ecosystem (tablets, phones, set-top boxes), Google has stepped out of Apple's shadow to square off in the digital content war (Figure 13).

	Never ▼	Sometimes ▼	Frequently ▼
▼ Verizon (e.g., on-demand video)	79.96% 790	14.78% 146	5.26% 52
▼ Comcast (e.g., on-demand video)	80.39% 787	14.50% 142	5.11% 50
▼ Time Warner (e.g., on-demand video)	80.37% 782	13.05% 127	6.58% 64
▼ Apple iTunes (e.g., books, games, movies, tv shows, mobile apps, desktop apps)	41.67% 418	34.00% 341	24.33% 244
▼ Google Play (e.g., books, games, movies, tv shows)	33.63% 340	33.83% 342	32.54% 329
▼ Amazon (e.g., books, games, movies, tv shows, games)	46.97% 465	36.16% 358	16.87% 167
▼ Steam (e.g., games)	68.33% 671	19.76% 194	11.91% 117
▼ EA Origin (e.g., games)	71.03% 694	21.08% 206	7.88% 77
▼ Barnes and Noble (e.g., books)	78.45% 761	14.54% 141	7.01% 68
▼ Sony (e.g., games, movies, books)	70.02% 689	22.15% 218	7.83% 77
▼ Microsoft Xbox (e.g., games, movies)	66.90% 661	21.86% 216	11.23% 111
▼ Nintendo (e.g., games, movies)	73.34% 718	19.71% 193	6.95% 68

Figure 13: From What Sources Do You Most Often Download? (All respondents)

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What's more, the emerging dominance of Google is growing even more amongst Millennials with 38% downloading Google products more frequently (data not shown).

Google's push into content distribution dominance might be related to the fact that Android phones are amongst the most frequently used devices to download and consume digital content (Figure 14).

	All the time ▾	Sometimes ▾	Never ▾
▼ Apple iPhone	25.98% 259	17.85% 178	56.17% 560
▼ Android phone	33.96% 341	23.01% 231	43.03% 432
▼ Apple iPod	10.82% 106	17.96% 176	71.22% 698
▼ Android tablet	17.17% 169	22.56% 222	60.26% 593
▼ Apple TV	5.41% 53	10.82% 106	83.78% 821
▼ Apple Mac computer	8.27% 81	13.98% 137	77.76% 762
▼ Microsoft phone	6.08% 59	11.53% 112	82.39% 800
▼ Microsoft Windows computer	38.08% 377	28.48% 282	33.43% 331
▼ Microsoft Xbox	9.34% 91	17.35% 169	73.31% 714
▼ Feature phone (i.e., Motorola RAZR)	5.03% 49	9.86% 96	85.11% 829
▼ Sony Playstation	7.83% 77	17.19% 169	74.97% 737
▼ Nintendo Wii	5.87% 57	16.58% 161	77.55% 753

Figure 14: From What Device Do You Most Often Consume the Content You Download? (All respondents)

For Consumers, Device Maintenance Is All About Staying in Control

Consumers do not only keep their connected devices on all the time (as evidenced by previous data in this report); they are actively engaged with them as well. In fact, according to a 2014 study⁵, consumers pick up their smartphones over 1500 times per week on average. And although much of that usage time is spent interacting with applications, some of it is spent downloading content, especially updates to already-installed software.

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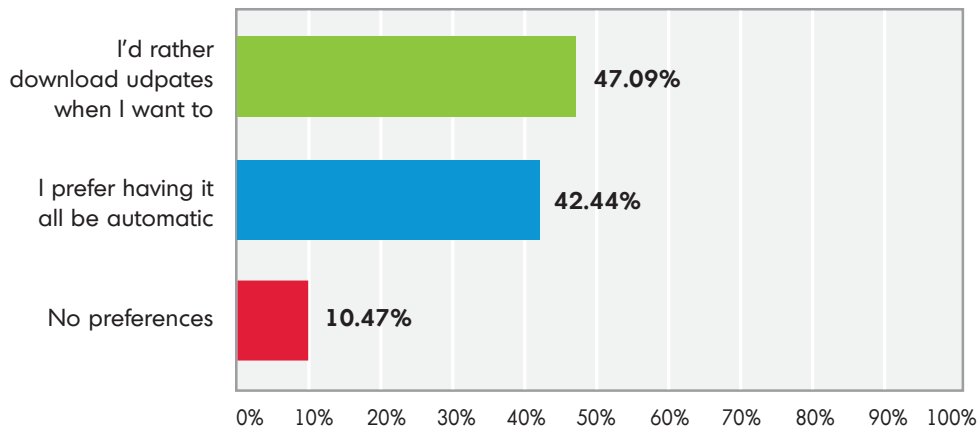


Figure 15: Do You Prefer To Download Updates (Such as Phone Operating System Updates) at Your Discretion or Do You Prefer Automatic Updates? (Millennials)

As indicated by Figure 15, the majority of respondents stated that they would rather update their software manually, which translates to a certain degree of uncertainty for software companies as they try to plan infrastructure capacity for the delivery of their digital content. If the updates are not happening automatically, it becomes increasingly difficult for organizations to provide a consistent download experience as download traffic can become spiky (i.e., a lot of users could opt to download concurrently, creating flash traffic that may exceed planned capacity).

The ISP Is the New Villain of the Digital Age

It goes without saying that there will be problems in the download experience—network congestion, flash crowds, cut lines, etc. Whatever the problem, when there's an issue, there's blame. But who takes the blame from consumers?

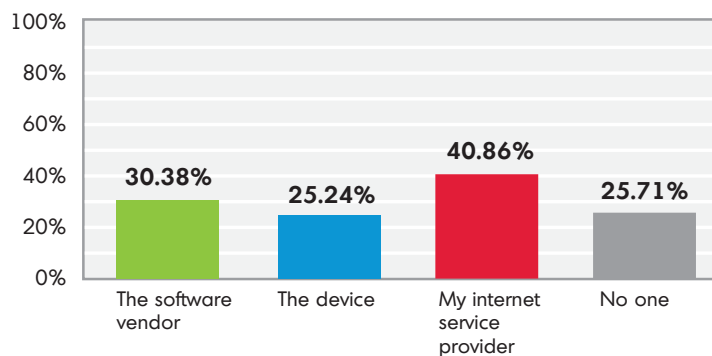


Figure 16: When You Have Trouble Downloading, Whom Do You Hold Responsible? (All Respondents)

As Figure 16 illustrates, users will most often (40% of the time) blame their Internet Service Provider (ISP) when they have trouble downloading. But this does not exonerate content providers, as 30% of respondents indicated that they blame the software vendor. Clearly the objective has to be to provide a download experience that is reliable, consistent, and fast so that users will have little to blame on anyone.

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Millennials Are the Demographic That Is Most Comfortable With Downloading Pirated Content

When asked the question, “Do you always pay for the content you download?” most respondents indicated that they do (Figure 17), with very few opting to pirate different kinds of content.

	I only download if it is free	I have no problem downloading pirated content	I always pay for content I download	I don't download this type of content
▼ Movies/TV shows	50.68% 519	12.30% 126	13.57% 139	23.44% 240
▼ Video games/game updates	45.70% 468	11.52% 118	16.80% 172	25.98% 266
▼ Updates to my phone's operating system	66.01% 672	8.74% 89	9.92% 101	15.32% 156
▼ New apps/updates to apps	67.16% 685	7.94% 81	11.86% 121	13.04% 133
▼ E-books	36.69% 372	9.17% 93	19.92% 202	34.22% 347
▼ Music	42.35% 432	13.04% 133	25.39% 259	19.22% 196
▼ Newspapers/magazines	41.92% 423	7.33% 74	11.30% 114	39.44% 398

Figure 17: Do You Always Pay for Content You Download? (All respondents)

And yet when the data is skewed demographically, the numbers change considerably (Figure 18). In fact, on average, there was a 50% jump amongst Millennials in the proclivity to download pirated content.

	I only download if it is free	I have no problem downloading pirated content	I always pay for content I download	I don't download this type of content
▼ Movies/TV shows	49.85% 170	19.65% 67	14.37% 49	16.13% 55
▼ Video games/ game updates	46.63% 159	19.06% 65	20.23% 69	14.08% 48
▼ Updates to my phone's operating system	69.53% 235	13.61% 46	11.24% 38	5.62% 19
▼ New apps/updates to apps	67.85% 230	12.39% 42	13.27% 45	6.49% 22
▼ E-books	38.94% 132	15.04% 51	17.11% 58	28.91% 98
▼ Music	43.95% 149	19.76% 67	23.60% 80	12.68% 43
▼ Newspapers/magazines	42.31% 143	11.83% 40	9.47% 32	36.39% 123

Figure 18: Do You Always Pay for Content You Download? (Millennials)

For organizations delivering digital content, this finding seems to indicate an increased need for protection, especially when that content is popular media such as movies, TV shows, and music.

The State of Digital Downloads

In the Device Ecosystem, Android Is Pulling Ahead

We often hear in the media about the dominance of the iOS, but when it comes down to using devices to consume content, Android is the clear winner.

	All the time ▾	Sometimes ▾	Never ▾
▾ Apple iPhone	25.98% 259	17.85% 178	56.17% 560
▾ Android phone	33.96% 341	23.01% 231	43.03% 432
▾ Apple iPod	10.82% 106	17.96% 176	71.22% 698
▾ Android tablet	17.17% 169	22.56% 222	60.26% 593
▾ Apple TV	5.41% 53	10.82% 106	83.78% 821
▾ Apple Mac computer	8.27% 81	13.98% 137	77.76% 762
▾ Microsoft phone	6.08% 59	11.53% 112	82.39% 800
▾ Microsoft Windows computer	38.08% 377	28.48% 282	33.43% 331
▾ Microsoft Xbox	9.34% 91	17.35% 169	73.31% 714
▾ Feature phone (i.e., Motorola RAZR)	5.03% 49	9.86% 96	85.11% 829
▾ Sony Playstation	7.83% 77	17.19% 169	74.97% 737
▾ Nintendo Wii	5.87% 57	16.58% 161	77.55% 753

Figure 19: From What Device Do You Most Often Consume the Content That You Download? (All respondents)

The State of Digital Downloads

Conclusion

Devices are proliferating and consumers are employing more of them, day and night, to download and consume digital content such as movies, TV shows, apps, music, games, and updates at a dizzying rate. This creates an interesting opportunity for the organizations that provide that content. Devices, especially the smartphone, represent a new “gateway” to consumer engagement. With so much time spent downloading and consuming digital content, the organizations that provide it are in a unique position to engage with their users while they employ their devices.

But that engagement can only happen when the download experience is great. Consumers will naturally disengage with the software and content they download or update as their frustration grows, which is especially true of Millennials who, more than anything, want a consistent download experience without interruption.

Organizations clearly need to mitigate consumer frustrations with downloading digital content and device updates if they hope to capitalize on the opportunity to engage with them through their devices. If the organizations providing this content—software companies, enterprises, and device manufacturers—can’t deliver the best possible download experience, those consumers may increasingly point the finger not at their ISP but at the brand itself.

Downloading, like consumption, is a digital experience that needs to be cultivated. By providing a great download experience, organizations have a much better chance of staying engaged and connected with their audience as they update or download new software and content, providing ample opportunity to deliver targeted marketing messages.

¹ <http://www.cbsnews.com/news/always-on-devices-are-using-huge-amounts-of-energy/>

² Limelight Networks. State of Online Video. May 2015.

³ As uncovered in our previous report, The State of Online Video, Millennials consume the most video content of any demographic. And although they favor longform video, it’s clear from the survey findings in that report that they actively watch short-form content as well.

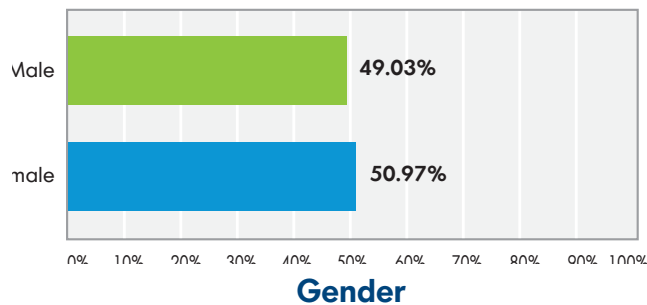
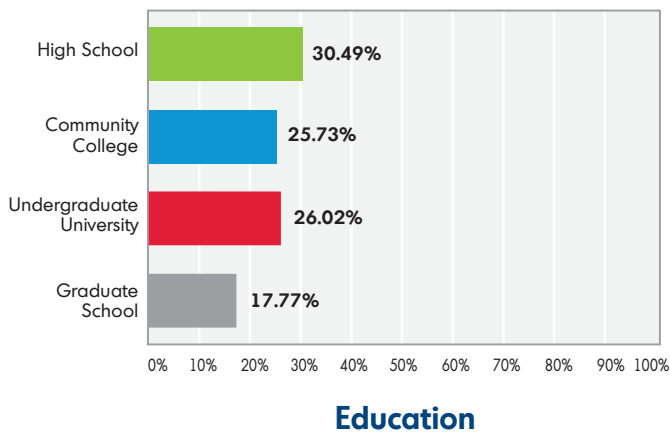
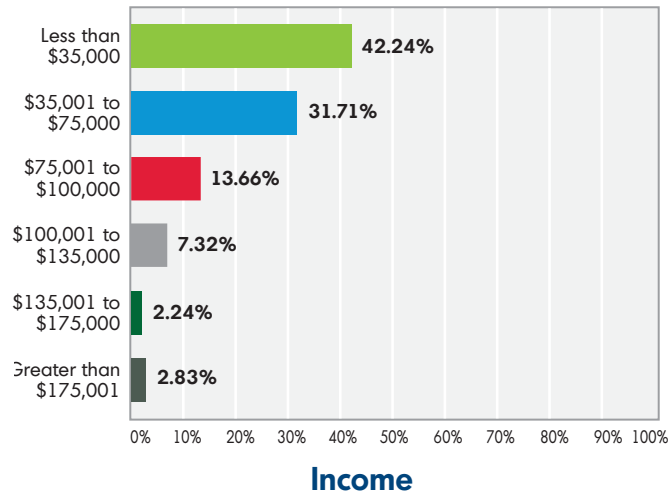
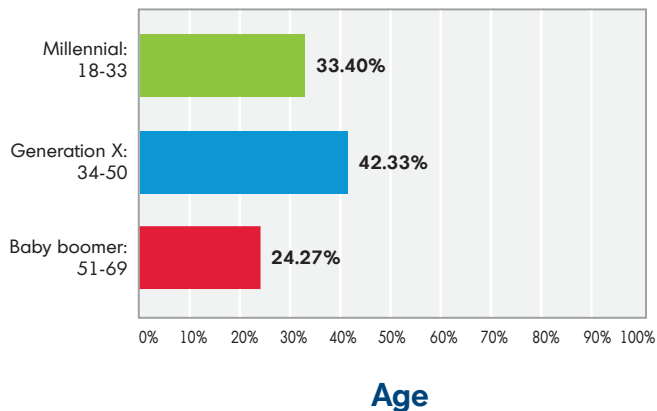
⁴ <http://blog.brightroll.com/2015/05/01/driven-by-data-why-you-should-get-personal-with-millennials/>

⁵ <http://www.dailymail.co.uk/sciencetech/article-2783677/How-YOU-look-phone-The-average-userpicks-device-1-500-times-day.html>

⁶ <http://www.nielsen.com/us/en/insights/news/2014/smartphones-so-many-apps--so-much-time.html>

The State of Digital Downloads

Demographics



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