

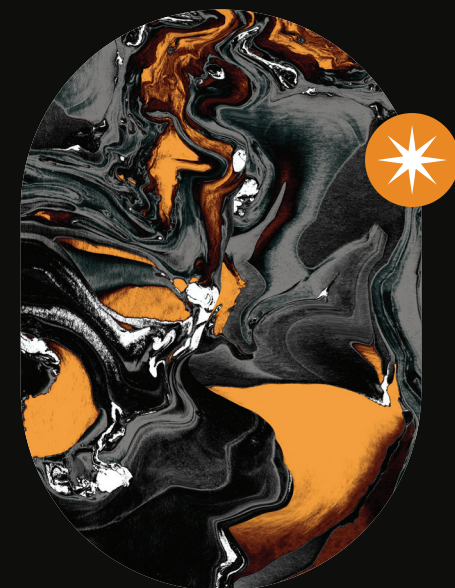
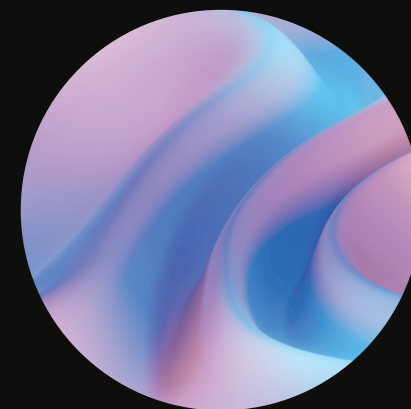
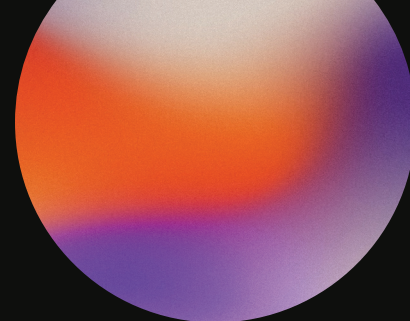


FUTURE OF CREATIVITY

MONETIZATION IN THE CREATOR ECONOMY



OCTOBER 2022



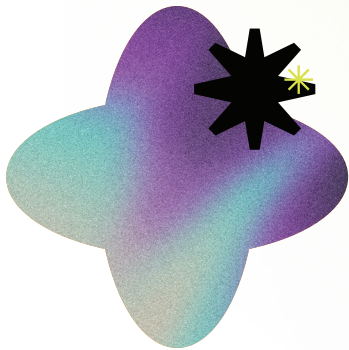
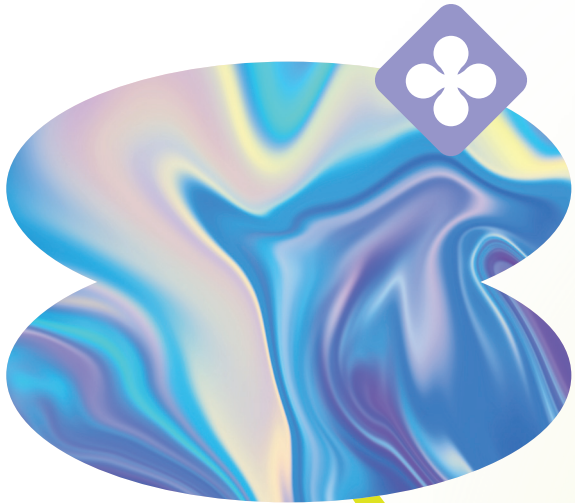


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MONETIZATION IN THE CREATOR ECONOMY

STUDY OVERVIEW

Adobe conducted a study to understand how creativity is changing around the world, speaking directly with those at the forefront of online creativity—creators in the creator economy.

EXPLORING THE FUTURE OF CREATORS AND THEIR IMPACT ON BUSINESS

- What does inclusivity and equality mean for creators across gender and ethnicity?
- How will the future of business be impacted by the creator economy?
- What does the future of monetization look like for creators around the world?
- Will the metaverse offer monetization opportunities for creators?

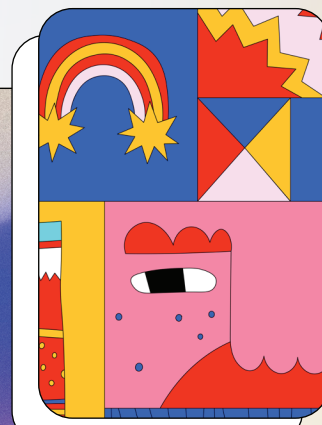
KEY AUDIENCES SURVEYED



CREATORS

Includes nonprofessionals 18+ years old who either:

- 01 participate in creative activities (like photography, creative writing, NFT creation, etc.) and post, share, or promote their work from these activities online, or
- 02 are dedicated to creating social content at least monthly with the goal of growing their social presence



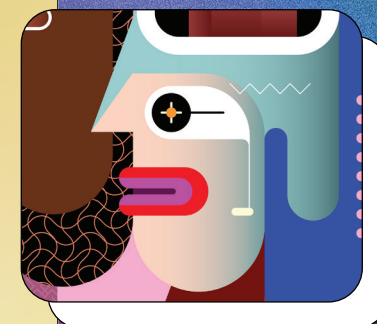
GEN Z CREATORS

Creators between the ages of 16-25



MONETIZERS

Earn income through their creative activities by selling via websites or marketplaces or via promotional revenue from partnerships, affiliate links, and ad revenue



GEN Z MONETIZORS

Monetizers between the ages of 16-25

SURVEY

METHODOLOGY

Edelman Data & Intelligence conducted a 15-minute survey among non-professional online creators in nine global markets, fielded May 4th – May 20th, 2022. While sample was managed to create a representative Gen Pop sample, this is not a market-sizing exercise, therefore market share stated within this report is estimated.

AUDIENCES

Creators

(n~600 per market)

Gen Z Creators

(n~550 per market)

SAMPLE SIZE

n=5,350

Margin of error:
±1.3% at the 95%
level of confidence.

n=5,222

oversample; natural fallout

Margin of error:
±1.4% at the 95%
level of confidence.

AUDIENCE DEFINITIONS

Ages 18+

Recruitment
managed to reflect
Gen Pop based
on age, gender.

Ages 16-25

Recruitment
managed to reflect
Gen Pop based
on gender.

METHOD

15-minute online survey,

Fielded May 2022 (5/4-5/20)

MARKETS

US, UK, France, Germany, Spain, Australia, Japan, South Korea, Brazil

*Note: audiences exclude any Creative Professionals (defined as 100% of income come from monetized content, AND work full / part time, or are self-employed full / part time.)

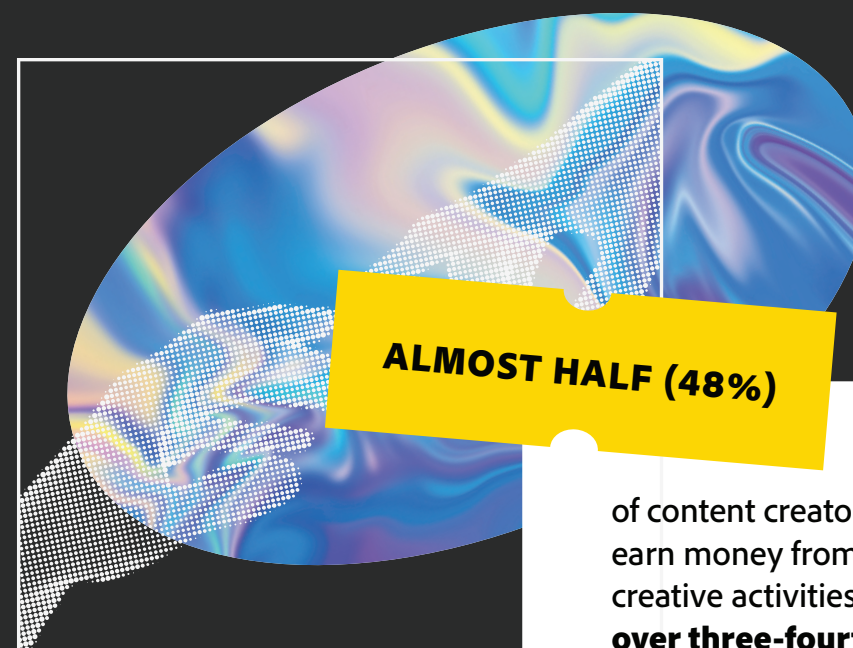


EXECUTIVE

SUMMARY

CREATORS ARE *CAPITALIZING* ON MONETIZATION OPPORTUNITIES

Monetization has grown significantly in the past year, and has become a **goal for Gen Z**.



ALMOST HALF (48%)

of content creators earn money from their creative activities, and **over three-fourths (77%)** of those who do began monetizing within the past year.

**EARNING
MORE PER
HOUR ON
AVERAGE,**

**half of Gen Z monetizers
ages 16-18 years old**
say they would prefer to
**start their own creative
business** than go to college.



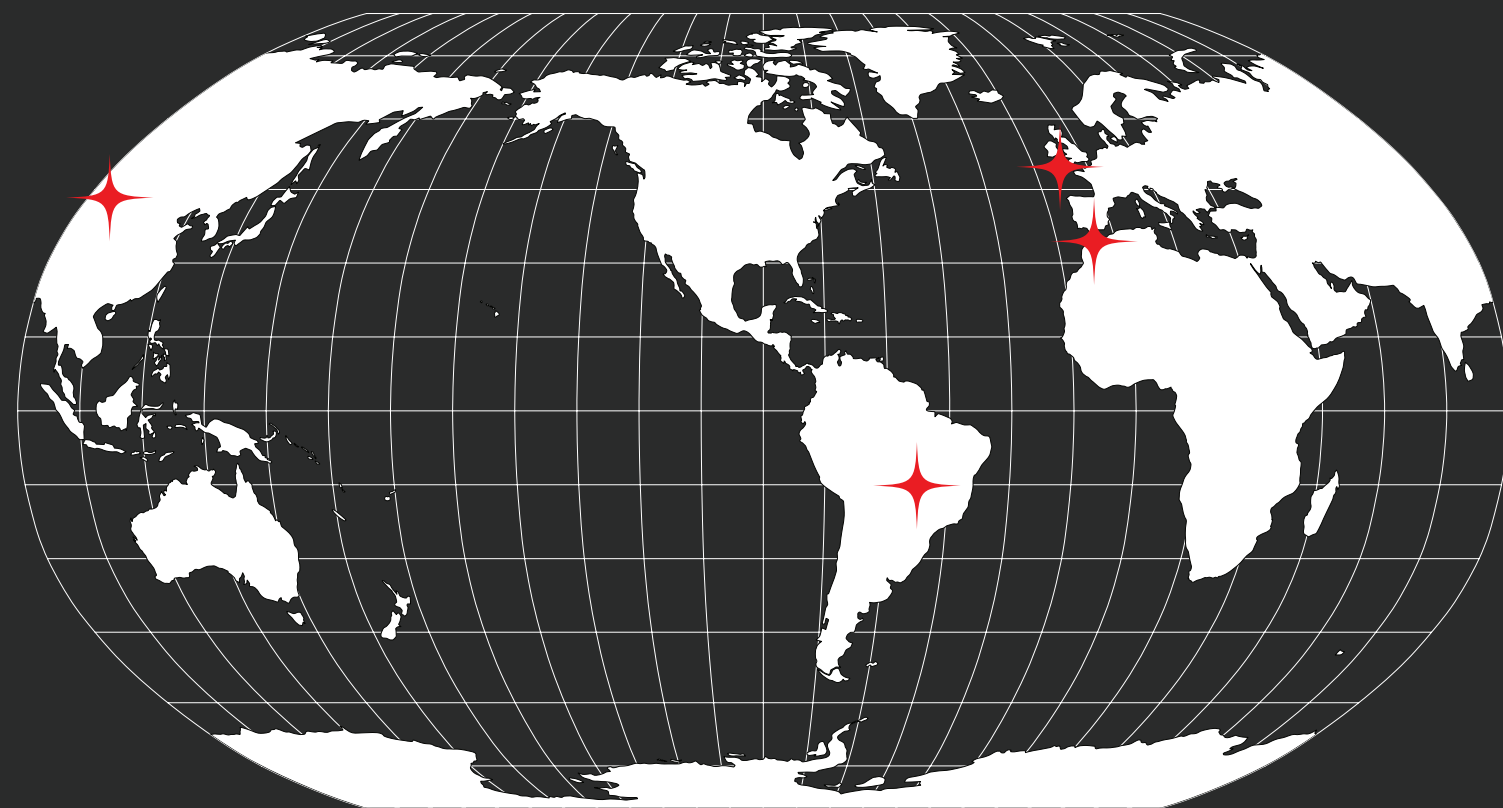
**GEN Z IS
WORKING
SMARTER,
NOT
HARDER.**

And it's
paying off – though
spending similar
amounts of time on
their creative activities,
Gen Z monetizers
are earning **higher
hourly rates**.

THE MONEY IS RIGHT

With **monetizers** earning
~6x more than the US
minimum wage across
all activities measured,
almost **half of monetizers**
indicate that this income
represents **half of their
total monthly income**.

THE CREATOR ECONOMY IS POISED TO *THRIVE* OVER THE NEXT TWO YEARS



The creator economy shows **no signs of slowing down** and will thrive in the next two years in global hot spots including **Brazil, US, Spain** and **UK**.

4 in 10 monetizers

are **making more money now than they were two years ago**, and of those, **8 in 10** anticipate earning even more in the next two years.

Over half of Gen Z monetizers

anticipate earning **more in the next two years** than they did in the past two years.

They're **setting trends** and are reaping the rewards by creating **more / new different things** in which consumers are increasingly interested.

Gen Z

is betting on the industry growing in **gaming, photography** and **general social media content**.



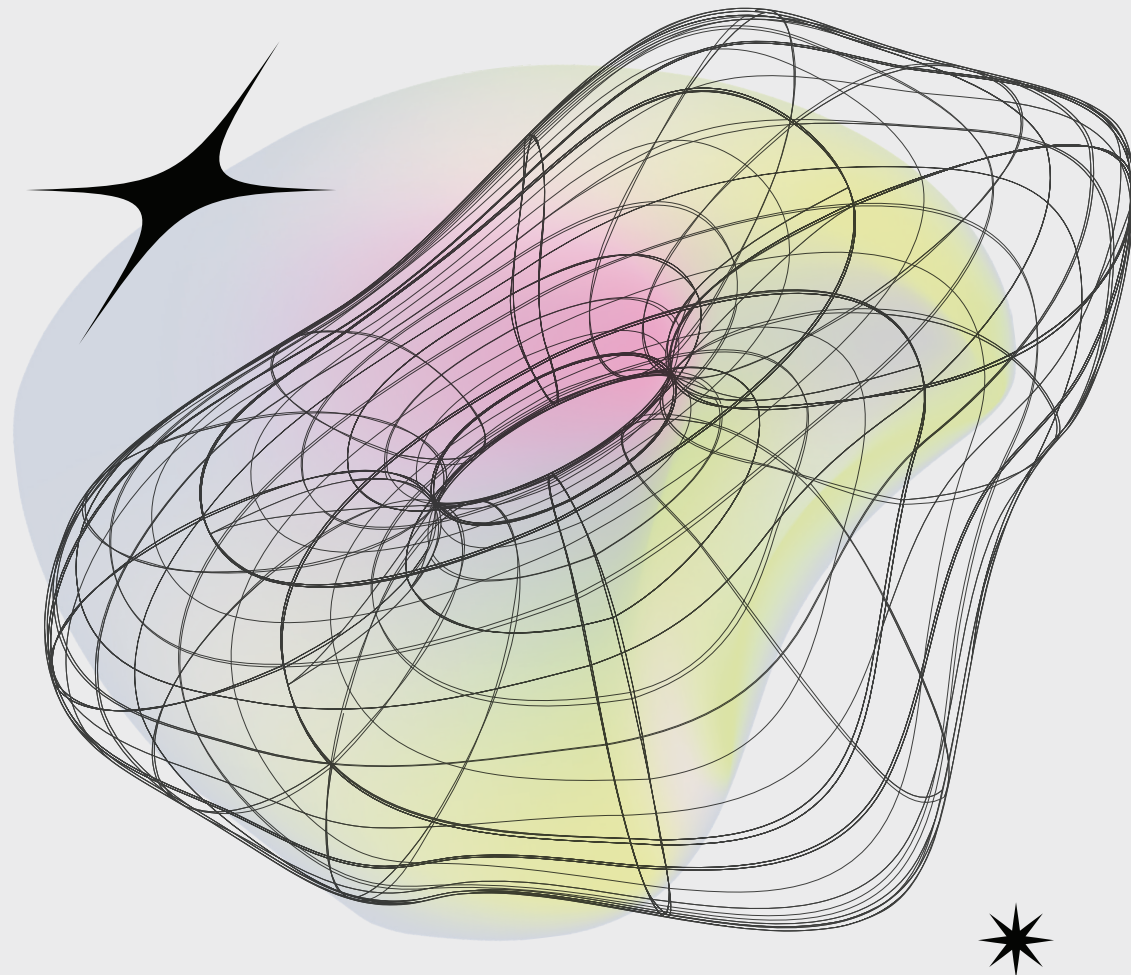
DETAILED

FINDINGS



**CREATORS ARE *CAPITALIZING* ON
MONETIZATION OPPORTUNITIES**

A CREATIVE PERSON IS ✦ A CREATIVE PERSON IS ✧ A CREATIVE PERSON IS ✦ A CREATIVE PERSON IS ✧ A CREATIVE PERSON IS



“

**It may be surprising,
but in fact, they are
thinking more about
business (how to
make money) than
creativity and artistry.**

— CREATOR, JAPAN

A CREATIVE PERSON IS ✦ A CREATIVE PERSON IS ✧ A CREATIVE PERSON IS ✦ A CREATIVE PERSON IS ✧ A CREATIVE PERSON IS

ABOUT *HALF OF* CREATORS EARN MONEY FROM THEIR CREATIVE ACTIVITIES OR SOCIAL POSTINGS. THIS GROUP OF CREATORS WE CALL MONETIZERS.

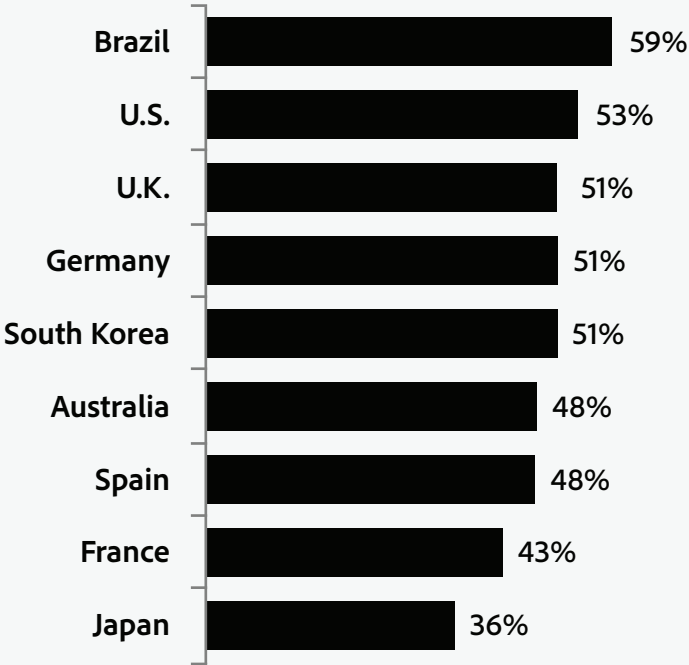
Brazilian creators are most likely to monetize, while only a third of those in Japan do.

 **% of creators who monetize**



52%	48%
Do Not Monetize	Monetize

 **% of creators who are monetizers by country**



MONETIZERS *SKEW*
TOWARDS MEN
AND MILLENNIALS.
6 IN 10 HAVE
FULL-TIME JOBS
AND IDENTIFY AS
BEING CREATIVE.

 **% Describes themselves as "creative"**



58%
Creators

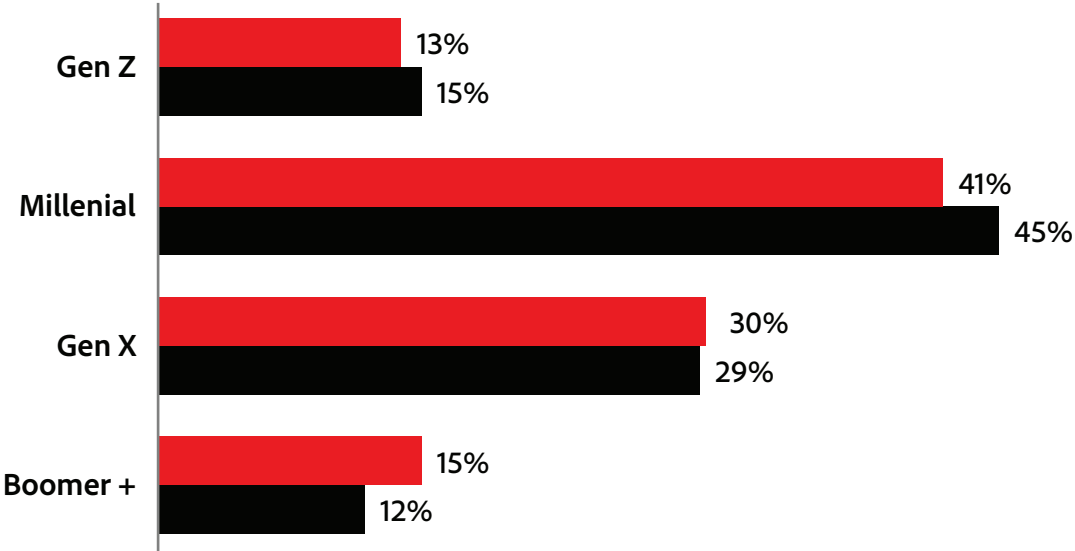
60%
Monetizers



Gender



Generation



	Creators	Monetizers
Top 3 Box Income Brackets	26%	28%
Employed Full-time	58%	61%

?

Income, Employment

Bolded text indicates significant difference between groups at the 95% confidence level

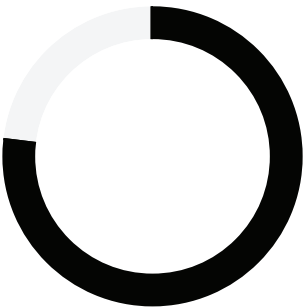
MONETIZING THEIR WORK IS NEW TO MOST CREATORS WITHIN THE PAST YEAR, AND LIKELY SOMETHING THEY DIDN'T PLAN FOR, HOWEVER NOW *IT REPRESENTS OVER HALF THEIR INCOME.*

...



Three-quarters of monetizers just started to earn income from their efforts within the past year, but **only 3 in 10** were initially driven to start creating by the opportunity to make money from it in the first place.

 **% Who started monetizing their activities in the past year**



77%
Monetizers

US	UK	AU	FR	DE	JP	BR	SP	SK
76%	78%	79%	76%	74%	70%	77%	83%	84%

Bolded text indicates significant difference between groups at the 95% confidence level

 **% Motivated to create by opportunity to earn money / turn it into a career**

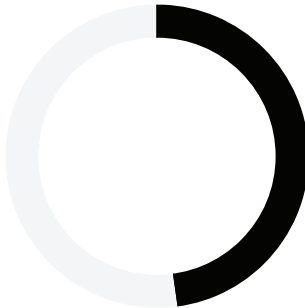


30%
Monetizers

US	UK	AU	FR	DE	JP	BR	SP	SK
34%	31%	30%	20%	20%	25%	48%	24%	39%

Bolded text indicates significant difference between groups at the 95% confidence level

 **Income is 50%+ of their monthly income**



48%
Monetizers

US	UK	AU	FR	DE	JP	BR	SP	SK
60%	52%	58%	46%	48%	43%	43%	36%	40%

Bolded text indicates significant difference between groups at the 95% confidence level

LIVING IN CREATIVE ENVIRONMENTS INSPIRES MONETIZERS— THIS IS PARTICULARLY TRUE FOR *US AND AUSTRALIAN* MONETIZERS.

Where I live has a lot of creative energy



61%
Creators

65%
Monetizers

US	UK	AU	FR	DE	JP	BR	SP	SK
79%	69%	73%	61%	64%	41%	70%	68%	58%

Bolded text indicates significant difference between groups at the 95% confidence level

Is the most creative environment I could imagine living in



54%
Creators

59%
Monetizers

US	UK	AU	FR	DE	JP	BR	SP	SK
70%	59%	64%	65%	58%	38%	59%	59%	56%

Bolded text indicates significant difference between groups at the 95% confidence level

Inspires my creativity



64%
Creators

67%
Monetizers

US	UK	AU	FR	DE	JP	BR	SP	SK
77%	70%	76%	67%	65%	49%	70%	70%	61%

Bolded text indicates significant difference between groups at the 95% confidence level

THEY ALSO TURN TO THE ISSUES AND CAUSES THEY CARE ABOUT FOR INSPIRATION.

1 in 3 monetizers are creating original content advocating for the causes they care about. Among this group, issues of top importance include climate change, followed by equity and equality issues.



Create original online content advocating for the causes they care about

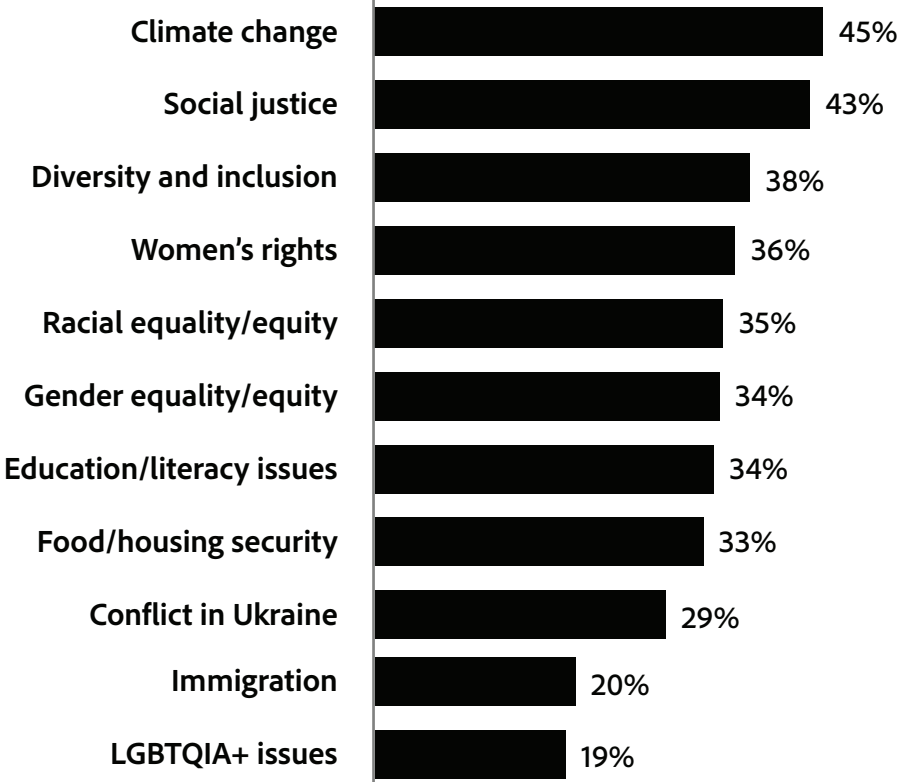


US	UK	AU	FR	DE	JP	BR	SP	SK
32%	26%	37%	28%	28%	19%	43%	34%	28%

Bolded text indicates significant difference between groups at the 95% confidence level

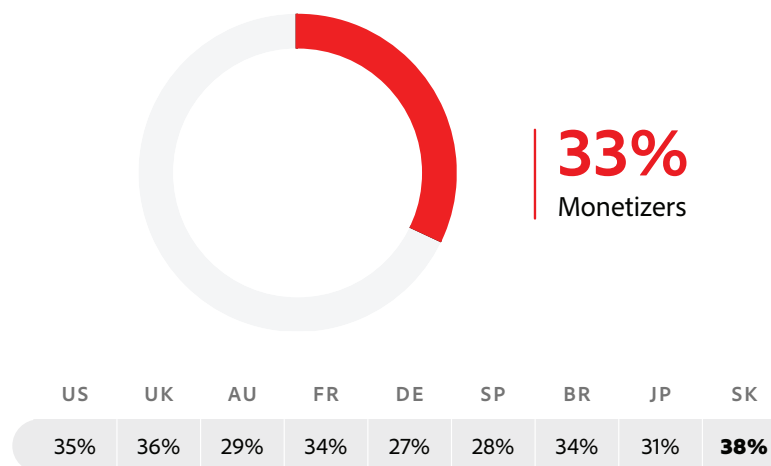


Issues / causes they create for



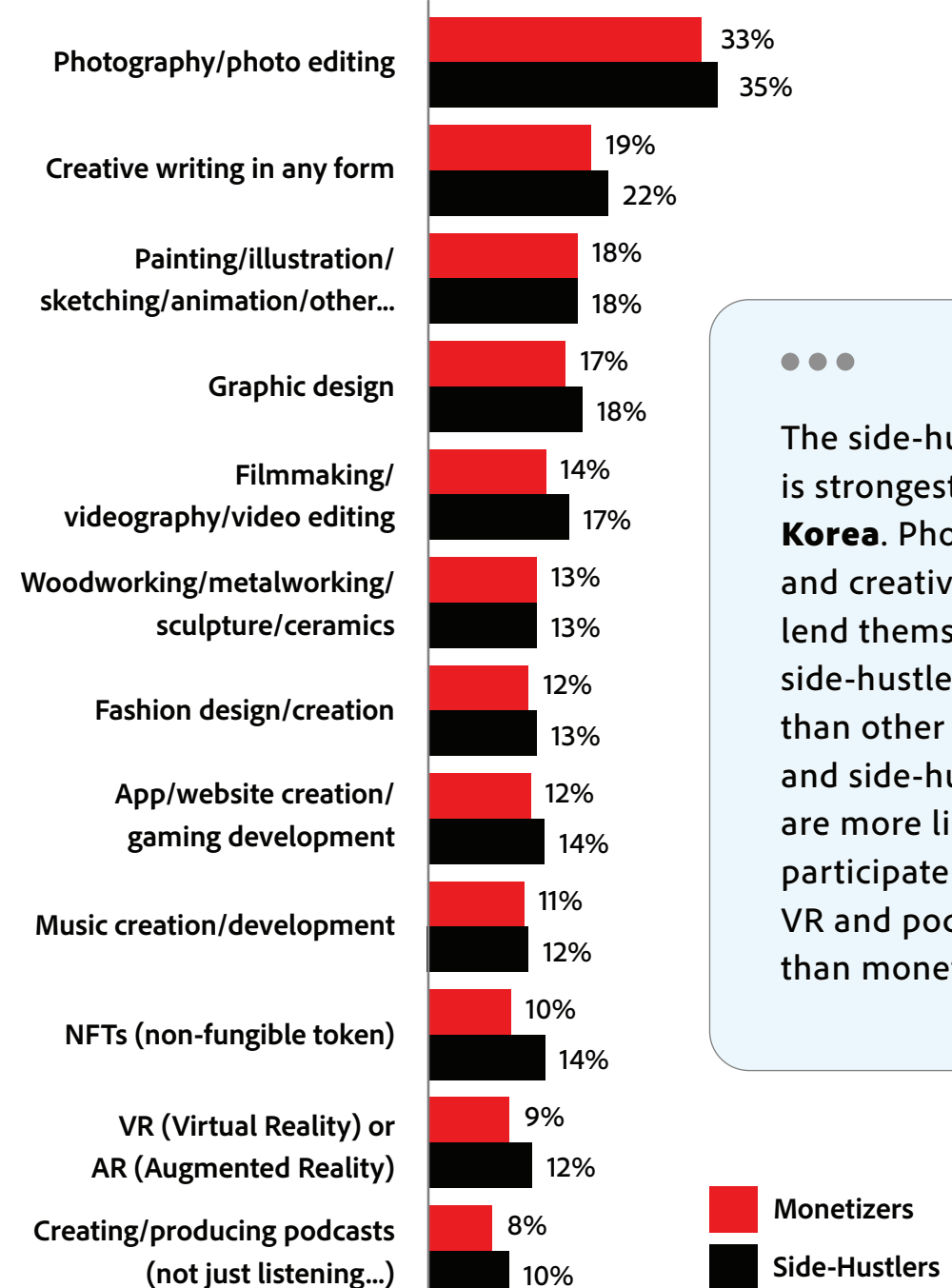
**A THIRD OF MONETIZERS
ARE 'SIDE-HUSTLERS' —
THOSE WHO ARE EMPLOYED
FULL-TIME AND EARN
50% OR LESS OF THEIR
INCOME FROM THEIR
CREATIVE ACTIVITIES.**

**Create original online content advocating
for the causes they care about**



Bolded text indicates significant difference between groups at the 95% confidence level

Issues / Causes they create for



The side-hustler market is strongest in **South Korea**. Photography and creative writing lend themselves to the side-hustle more so than other activities, and side-hustlers are more likely to participate in NFTs, VR and podcasts than monetizers.

ACROSS ALL MARKETS, CREATORS ARE MONETIZING *PHOTOGRAPHY, CREATIVE WRITING AND VISUAL ARTS* MOST OFTEN.



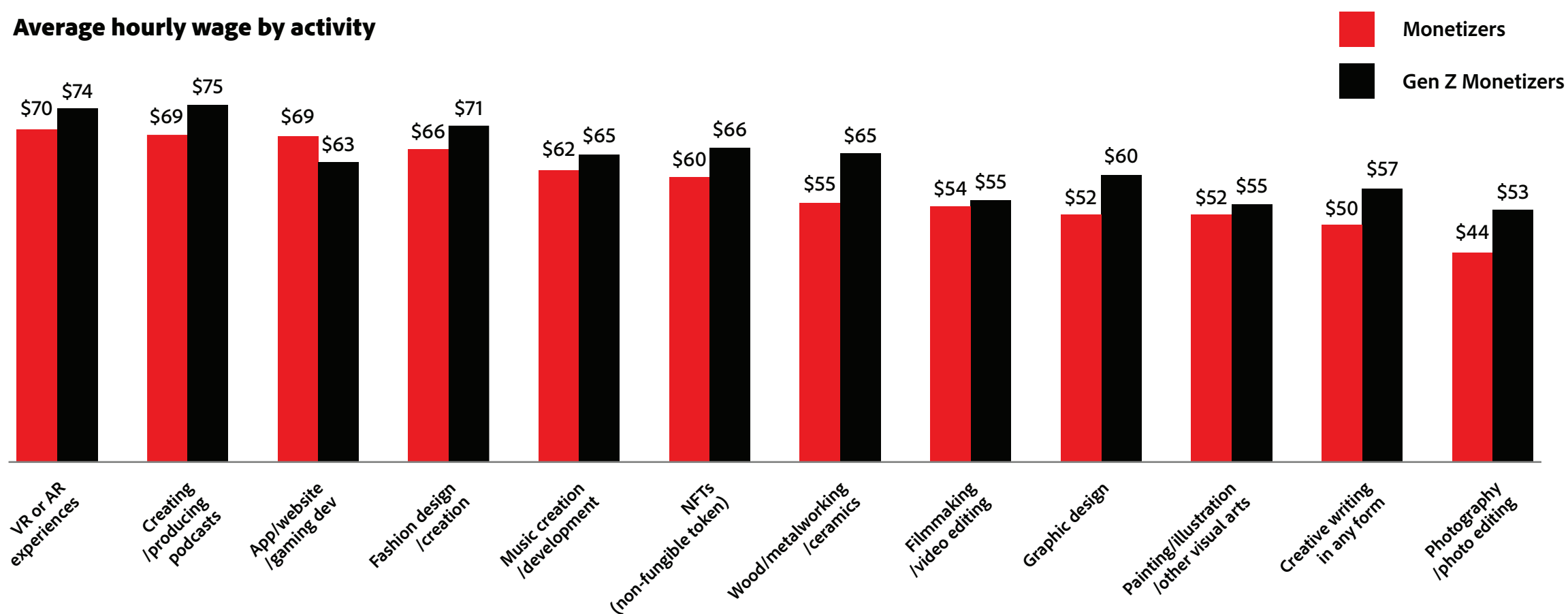
Monetization of NFTs is **highest in the US**, where as many monetizers earn income through NFTs as they do creative writing or graphic design.

Creators—Activities Monetized	Global Total	US	UK	AU	FR	DE	JP	BR	SP	SK
Photography/photo editing	26%	23%	23%	24%	22%	24%	33%	31%	25%	30%
Creative writing in any form	16%	15%	17%	19%	14%	18%	8%	15%	13%	22%
Painting/illustration/sketching/animation/other visual arts	15%	18%	17%	14%	13%	11%	20%	14%	14%	9%
Graphic design	13%	15%	16%	14%	12%	12%	10%	17%	16%	10%
Filmmaking/videography/video editing	11%	10%	9%	11%	13%	10%	8%	21%	10%	11%
Woodworking/metalworking/sculpture/ceramics	10%	9%	13%	11%	13%	14%	8%	10%	10%	5%
Fashion design/creation	10%	11%	11%	15%	11%	7%	6%	9%	9%	8%
App/website creation/gaming development	10%	12%	14%	11%	10%	9%	7%	10%	6%	9%
Music creation/production	9%	17%	10%	11%	9%	10%	7%	5%	6%	6%
NFTs (non-fungible token)	8%	15%	9%	7%	4%	6%	3%	9%	5%	10%
VR (Virtual Reality) or AR (Augmented Reality) experiences	7%	11%	11%	8%	7%	7%	5%	5%	4%	8%
Creating/producing podcasts (not just listening to them)	6%	7%	9%	7%	7%	5%	3%	5%	6%	6%

MONETIZERS ACROSS ALL ACTIVITIES ARE EARNING *AT LEAST 6X THE US MINIMUM WAGE**, WITH THOSE IN APP / WEBSITE DEV AND VR/AR EXPERIENCES EARNING 10X MORE.

Across almost all mediums,
**Gen Z is earning higher
incomes** than their peers.

Average hourly wage by activity



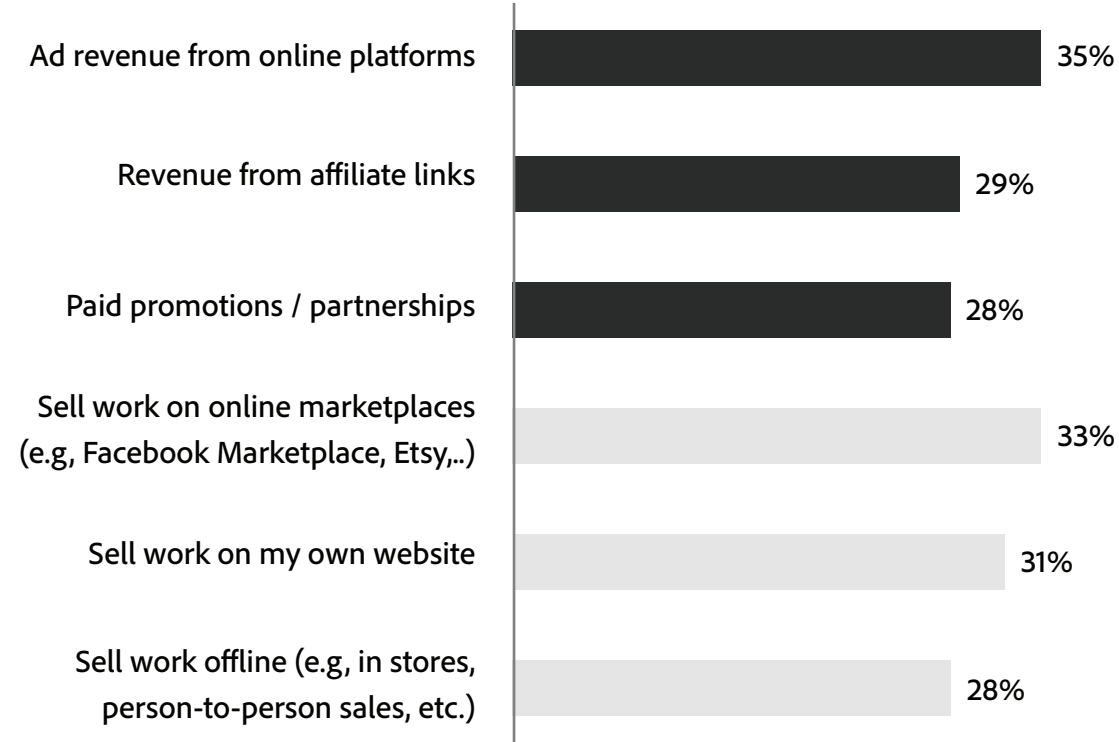
*US Federal minimum wage is \$7.25/ hr

\$20. For which of the following have you received any type of financial compensation in the past 12 months? This could be ongoing payments, or a single one-time payment, a commission, etc., either by selling products directly, receiving advertising revenue, paid promotions, etc.? **Q6.** Approximately how many hours a week do you spend developing the creative or original social media content you share online? **Q45:** In an average month, approximately how much money do you earn from posting creative or original social media content online? Please consider all sources of income, your best estimate is fine. Base Sizes: Monetizers (N=2,350), Gen Z Monetizers (N=1,820); base sizes vary activity

SOURCES OF FINANCIAL COMPENSATION ARE EVENLY SPLIT BETWEEN PROMOTIONAL REVENUE (E.G., AD REVENUE, AFFILIATE LINKS, PARTNERSHIPS) AND SELLING DIRECTLY TO CONSUMER VIA ONLINE / OFFLINE CHANNELS.

Brazilian and South Korean monetizers are more likely to be earning promotional revenue, while monetizers in the US and Germany are earning via direct sales through online / offline channels.

Sources of Income



65% Promotional Revenue

67% Sells work online / offline

Sources of Income by country

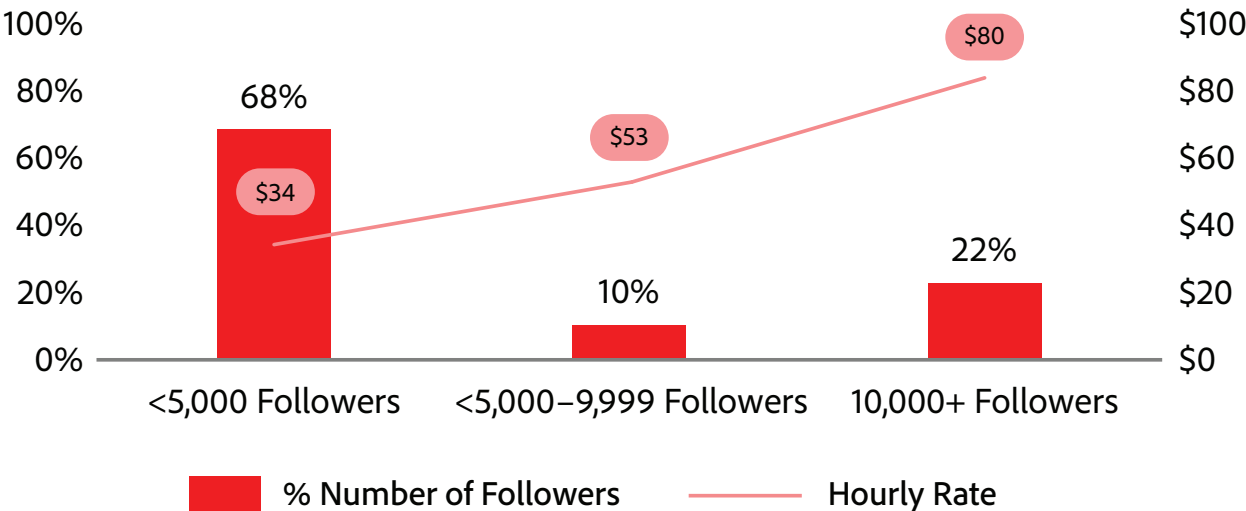
	US	UK	AU	FR	DE	JP	BR	SP	SK
●	62%	61%	58%	67%	52%	65%	75%	65%	75%
●	74%	70%	74%	60%	77%	64%	69%	61%	55%

Bolded text indicates significant difference between groups at the 95% confidence level

**HOURLY RATES
INCREASE WITH
INFLUENCER
STATUS, BUSINESS
OWNERSHIP
AND NUMBER OF
FOLLOWERS.**



Average hourly wage by number of followers



Average hourly wage by audience

Influencers

\$76/hr

~\$152k annually, if done full-time

Business owners

\$75/hr

~\$150k annually, if done full-time

Q6. Approximately how many hours a week do you spend developing the creative or original social media content you share online? **Q45.** In an average month, approximately how much money do you earn from posting creative or original social media content online? Please consider all sources of income, your best estimate is fine. **D1.** Approximately how many followers do you currently have on social media? Please consider the platform where you have the most followers. Base Sizes: Monetizers (N=2,350), Influencers (n=657), Business Owners (n=594), Monetizers with <5k followers (N=1,600), 5k-9.9k (n=227), 10k+ followers (N=523)

FOR WOMEN AND BIPOC CREATORS, THE *PAY EQUITY GAP* PERSISTS AS THEY ARE EARNING 20%–25% LESS PER HOUR THAN THEIR COUNTERPARTS.



Average hourly wage by gender

Men monetizers

\$55/hr

~\$110k annually, if done full-time

Women monetizers

\$44/hr

~\$88k annually, if done full-time



Average hourly wage by ethnicity

White monetizers



\$62/hr

~\$124k annually, if done full-time

BIPOC monetizers

\$49/hr

~\$98k annually, if done full-time

	US	UK	AU	FR	DE	JP	BR	SP	SK
	\$56	\$77	\$99	\$62	\$69	\$36	\$25	\$28	\$43
	\$37	\$62	\$72	\$37	\$69	\$25	\$19	\$25	\$51
GAP	-\$19	-\$15	-\$27	-\$25	—	-\$11	-\$6	-\$3	\$8

Q6. Approximately how many hours a week do you spend developing the creative or original social media content you share online? Q45: In an average month, approximately how much money do you earn from posting creative or original social media content online? Please consider all sources of income, your best estimate is fine. Base Sizes: Male Monetizers (N=1,314, Female Monetizers (N=1,026); base sizes vary by country, US / UK White Monetizers (n=389), US / UK Non-White Monetizers (n=157)

GEN Z IS WORKING *SMARTER*, NOT HARDER, AND IT'S PAYING OFF—THOUGH SPENDING SIMILAR AMOUNT OF TIME ON THEIR CREATIVE ACTIVITIES, GEN Z MONETIZERS ARE EARNING HIGHER HOURLY RATES.

Average hours per week spent on creative activities

Monetizers

11 hrs/week

Gen Z monetizers

11 hrs/week

Average hourly wage

Monetizers

\$51/hr

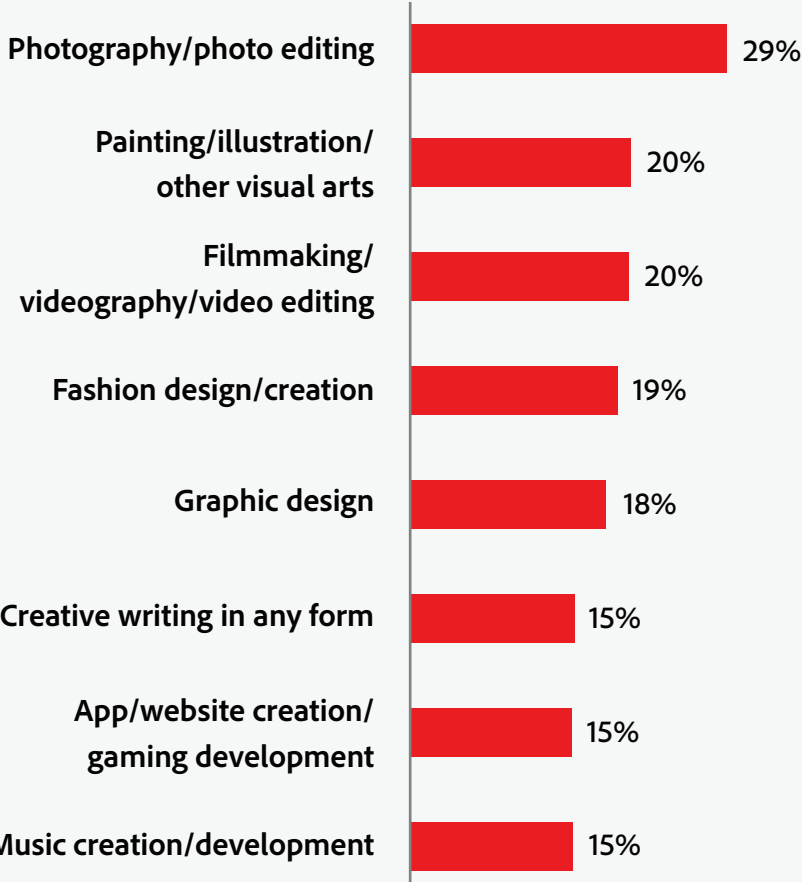
~\$104k annually, if done full-time

Gen Z monetizers

\$58/hr

~\$116k annually, if done full-time

Top Gen Z Monetized Activities



S20: For which of the following have you received any type of financial compensation in the past 12 months? This could be ongoing payments, or a single one-time payment, a commission, etc., either by selling products directly, receiving advertising revenue, paid promotions, etc. (Gen Z Monetizers (N=1762) Q6. Approximately how many hours a week do you spend developing the creative or original social media content you share online? Q45: In an average month, approximately how much money do you earn from posting creative or original social media content online? Please consider all sources of income, your best estimate is fine.. Base Sizes: Monetizers (N=2350), Gen Z Monetizers (N=1820)

SO MUCH SO THAT
GEN Z MONETIZERS
MAY CONSIDER
GIVING UP THE
STABILITY OF
*TRADITIONAL
EMPLOYMENT, AND*
THE YOUNGEST
FORGOING *COLLEGE.*

✦ % Agree they like the security of working
for a third-party business/corporation
(T3B agree)



US	UK	AU	FR	DE	JP	BR	SP	SK
53%	50%	47%	57%	49%	42%	49%	55%	49%

Bolded text indicates significant difference between groups at the 95% confidence level

✦ % Agree they'd rather start their own
creative business than go to college
(T3B among those 16-18 years old agree)



WHY ARE GEN Z, MEN AND WHITE MONETIZERS EARNING *HIGHER RATES*?

...

They already have substantial followings and are capitalizing on business ownership and influencer status.

? Aspirations	Monetizers	Gen Z Monetizers	Men Monetizers	Women Monetizers	White Monetizers	BIPOC Monetizers
Own their own business	25%	33%	27%	24%	33%	34%
Currently working towards owning their own business	50%	51%	49%	50%	45%	50%
Currently an influencer	27%	42%	29%	25%	29%	26%
Current goal of becoming an influencer	34%	34%	35%	31%	42%	50%
Actively growing their number of followers	50%	48%	51%	47%	60%	57%

? Number of followers	Monetizers	Gen Z Monetizers	Men Monetizers	Women Monetizers	White Monetizers	BIPOC Monetizers
10k+	22%	33%	24%	20%	24%	17%

Bolded text indicates significant difference between groups at the 95% confidence level

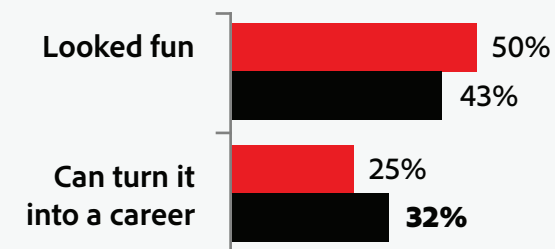
S3. How old are you? S4. How do you identify? S25. When you think about the future as it relates to the original social media content you post, which of these are goals, aspirations, or outcomes you would consider?

Q13. Thinking about the future, would you be interested in owning or running your own business (including being a contractor / freelancer) that allowed you to sell or make money from the type of creative or original social media content you share online? D1. Approximately how many followers do you currently have on social media? Please consider the platform where you have the most followers. Base: Gen Pop Monetizers (n=2350), Gen Z Monetizers (n=1820), Male Monetizers (n=1314), Female Monetizers (n=1026), White US / UK Monetizers (n=389), BIPOC US / UK Monetizers (n=157)

BIPOC GEN Z CREATORS ARE PARTICULARLY AMBITIOUS IN THEIR DESIRE TO MONETIZE THEIR CREATIVE ACTIVITIES.

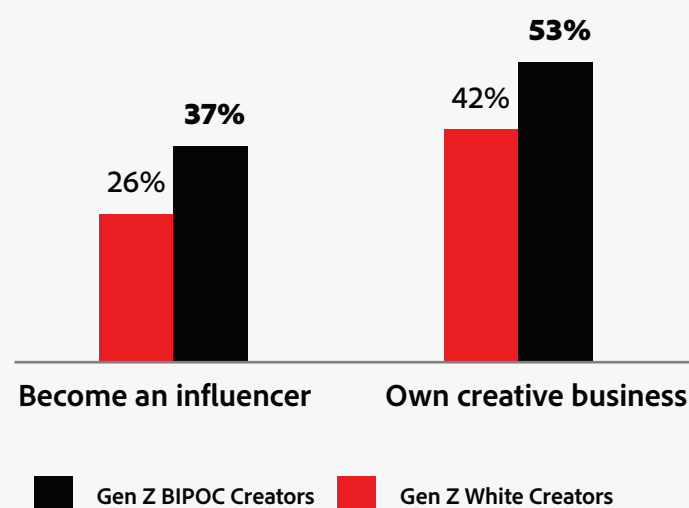
A third started creating with the hopes of turning it into a career, and over half are actively working towards owning their own business. Successful in their efforts, 8 in 10 currently monetize their creative activities while 4 in 10 monetize original social content.

Motivations for creating



■ Gen Z BIPOC Creators ■ Gen Z White Creators

Current goals



■ Gen Z BIPOC Creators ■ Gen Z White Creators

% Monetize Any Activity



68%

Gen Z White Creators

80%

Gen Z BIPOC Creators

% Monetize Social



33%

Gen Z White Creators

38%

Gen Z BIPOC Creators

Bolded text indicates significant difference between groups at the 95% confidence level

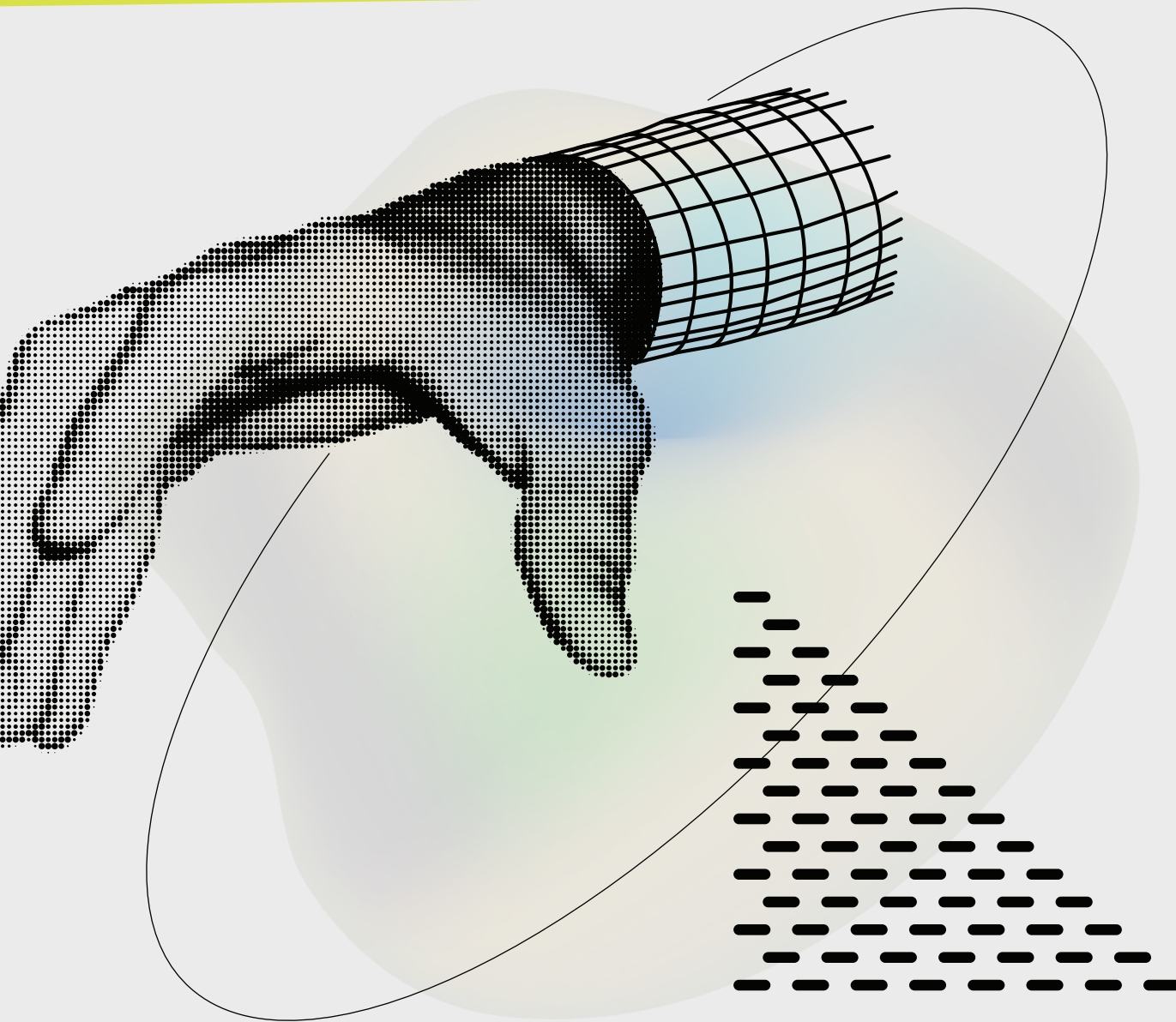
Q3: What motivated you to start engaging in creative activities or creating original social media content? **Q13:** Thinking about the future, would you be interested in owning or running your own business (including being a contractor / freelancer) that allowed you to sell or make money from the type of creative or original social media content you share online? Base Sizes: US/UK Gen Z White Creators (N=677), US / UK Gen Z Non-white (N=478) **S25:** When you think about the future as it relates to the original social media content you post, which of these are goals, aspirations, or outcomes you would consider? **S26:** Do you currently earn money through posting social media content? Base Sizes: US / UK Gen Z White Creators (N=630), US / UK Gen Z Non-white Creators (N=447) **S20:** For which of the following have you received any type of financial compensation in the past 12 months? Base Sizes: US / UK Gen Z White Creators (N=596), US / UK Gen Z Non-white Creators (N=444)



▼

**THE CREATOR
ECONOMY IS POISED
TO *THRIVE* OVER THE
NEXT TWO YEARS**

A CREATIVE PERSON IS ✦ A CREATIVE PERSON IS ✧ A CREATIVE PERSON IS ✦ A CREATIVE PERSON IS ✧ A CREATIVE PERSON IS



“

He knows how to
get the best out
of himself, and
make that a job

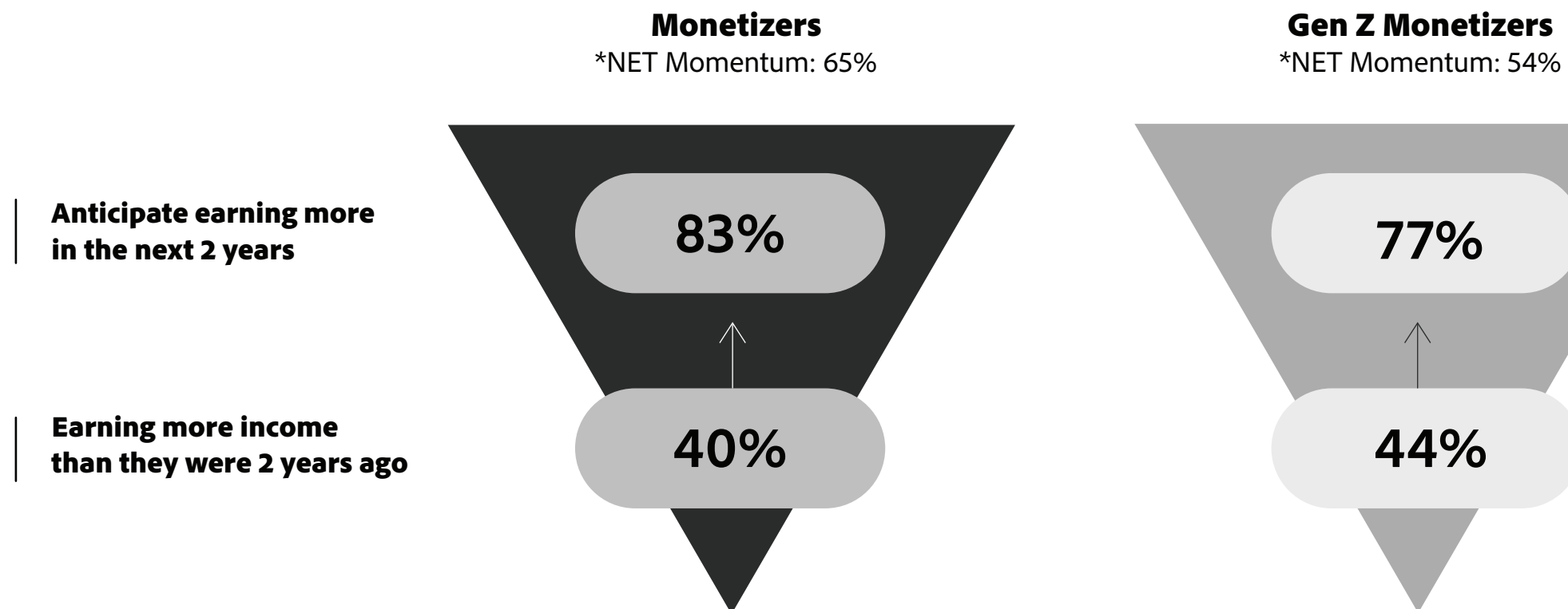
— CREATOR, SPAIN

A CREATIVE PERSON IS ✦ A CREATIVE PERSON IS ✧ A CREATIVE PERSON IS ✦ A CREATIVE PERSON IS ✧ A CREATIVE PERSON IS

THE CREATOR ECONOMY SHOWS *NO SIGNS* OF SLOWING DOWN.

...

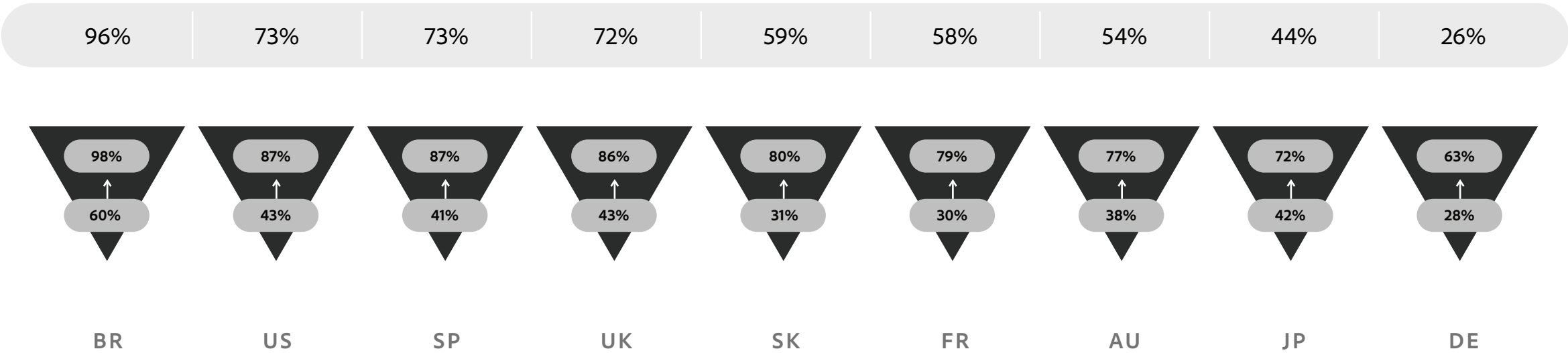
4 in 10 monetizers are making more money now than they were 2 years ago, and of those, **8 in 10** anticipate earning even more in the next 2 years.



*NET Momentum Calculation (% who have earned more in the past 2 years AND anticipate earning more in the next two years) – (% who have earned more in the past 2 years, but expect loss or no growth in the next 2 years)
Q47. Compared to 2 years ago, are you earning more or less money from posting creative or original social media content online? Base Sizes: Monetizers (N=2,350), Gen Z Monetizers (N=1,820). Q48. And thinking about 2 years from now, do you expect to earn more or less money from posting creative or original social media content online? Monetizers who earned more than two years ago (N=993), Gen Z Monetizers who earned more than two years ago (N=802)

AND IT WILL THRIVE
IN THE NEXT 2
YEARS IN GLOBAL
HOT SPOTS *BRAZIL,
US, SPAIN AND UK.*

Net Momentum



*NET Momentum Calculation (% who have earned more in the past 2 years AND anticipate earning more in the next two years) – (% who have earned more in the past 2 years, but expect loss or no growth in the next 2 years)
Q47. Compared to 2 years ago, are you earning more or less money from posting creative or original social media content online? Q48. And thinking about 2 years from now, do you expect to earn more or less money from posting creative or original social media content online? Base sizes vary by country

OVER HALF OF GEN Z
MONETIZERS ANTICIPATE
EARNING MORE IN THE
NEXT 2 YEARS THAN THEY
DID IN THE PAST 2 YEARS.

They're setting trends and are reaping the rewards by creating more / new different things in which consumers are increasingly interested and in turn, consistently gaining more followers.

% Anticipate earning more in the next 2 years
(T2B more)



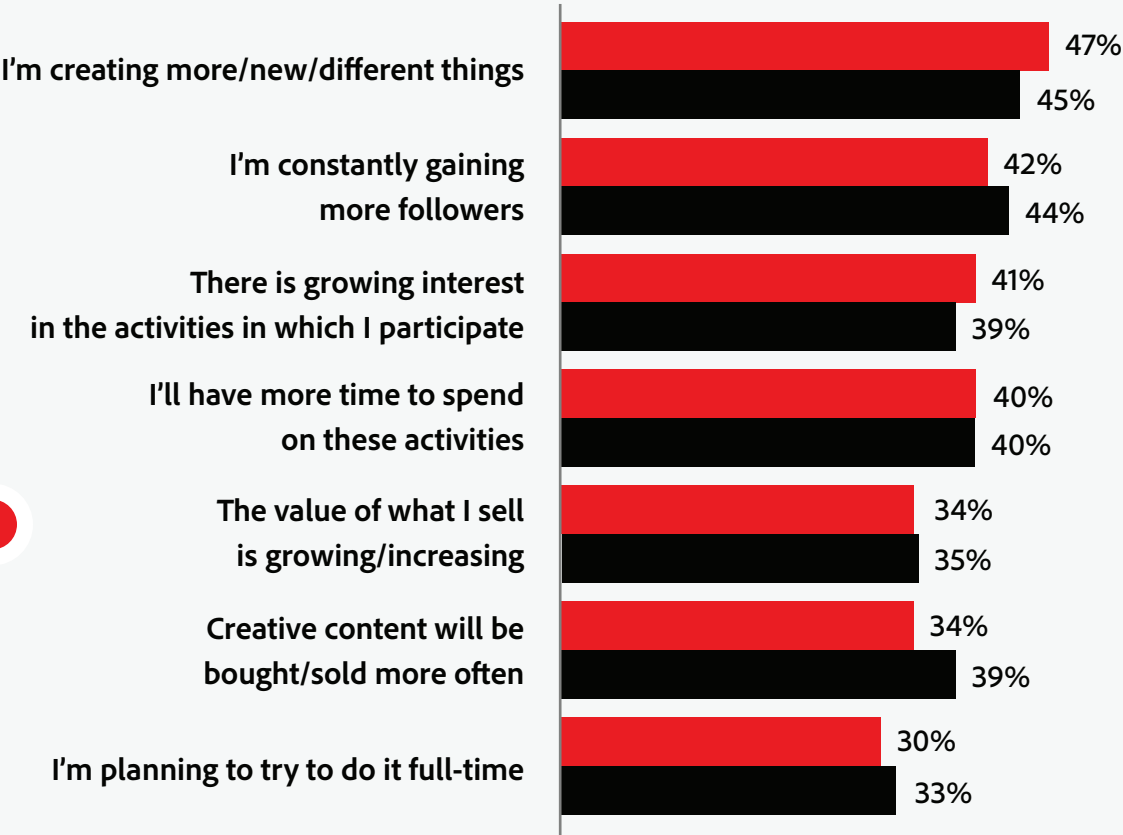
49%
Monetizers

54%
Gen Z Monetizers

US	UK	AU	FR	DE	JP	BR	SP	SK
54%	54%	46%	36%	29%	45%	84%	49%	45%
53%	54%	61%	44%	41%	53%	76%	54%	54%

Bolded text indicates significant difference between groups at the 95% confidence level

Reasons for earning more in the next 2 years



WHO ARE THE MONETIZERS WITH A *POSITIVE* FINANCIAL OUTLOOK?

They're urban, millennial, affluent risk-takers, motivated to start creating by the opportunity to earn income, and the dream of being able to create as part of their job.



Demographic Profile

Millennials (50%),
average age **37 years**

Earn in a top 3 income bracket **(36%)**

Live in Urban environments **(69%)**

Agree they live in an environment where creative expression is highly valued **(74%)**

Are well-educated **(63% university education or higher)**

Have children under age 18 living in their home **(70%)**



Psychographic Profile

Identify as being...

Creative **(67%)**

Ambitious **(45%)**

Career-focused **(49%)**

Money driven **(34%)**

Agree they enjoy taking risks **(73%)**

Are generally in a positive mood **(78%)**



Creator Profile

Were motivated to start creating by opportunity to make money / turn it into a career **(42%)**

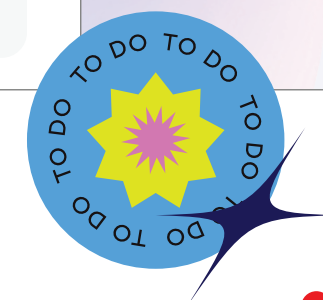
First started creating in the past 2 years **(51%)**

First started monetizing in the past year **(74%)**

Spend **13hrs / week** on creative

Already own their own business related to creative work **(32%)**

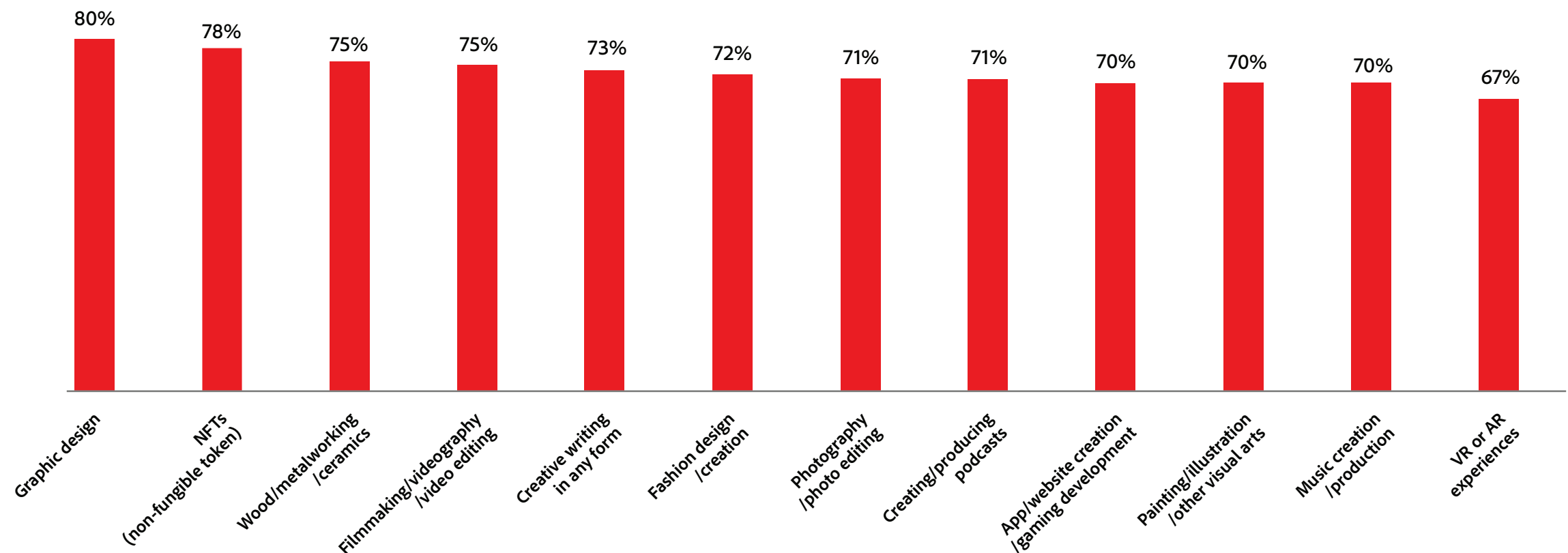
Agree being able to create as part of their job would be a dream come true **(87%)**



THOSE CURRENTLY MONETIZING *GRAPHIC DESIGN* AND *NFTs* SHOW THE GREATEST POTENTIAL FOR GROWTH.



NET Momentum* by Activity Currently Monetize

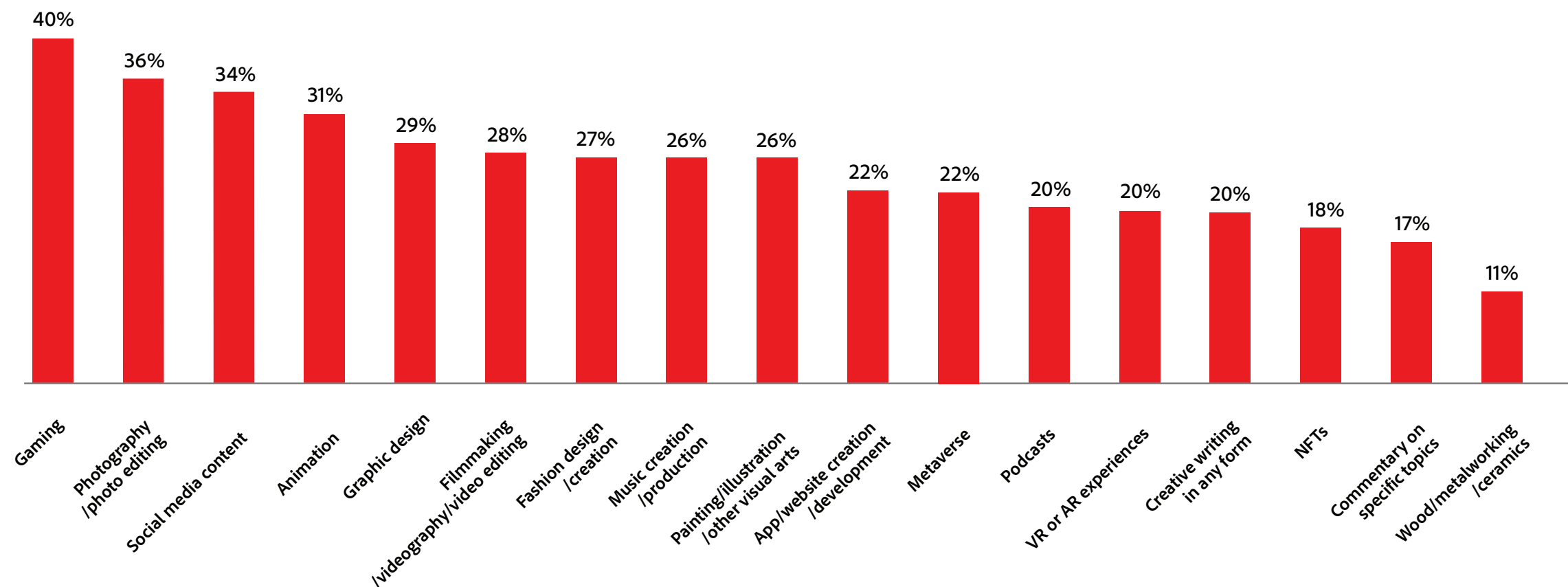


*NET Momentum Calculation (% who have earned more in the past 2 years AND anticipate earning more in the next two years) – (% who have earned more in the past 2 years, but expect loss or no growth in the next 2 years)
Q47. Compared to 2 years ago, are you earning more or less money from posting creative or original social media content online? Q48. And thinking about 2 years from now, do you expect to earn more or less money from posting creative or original social media content online? Base Sizes: Those who currently monetize the activity; base sizes vary by activity

**HOWEVER, GEN Z IS BETTING
ON THE INDUSTRY GROWING IN
*GAMING, PHOTOGRAPHY AND
GENERAL SOCIAL MEDIA CONTENT.***



**Anticipated Areas of Growth
Among Gen Z Monetizers**





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