

WHAT'S NEXT FOR CONTENT-LED MARKETING?

RESEARCH REPORT
MARCH 2021



The Atlantic

WORLD
NEWS
GROUP

Bloomberg
Media

BUSINESS
INSIDER

The
Economist

Forbes

FORTUNE

FT
LONDON
NEW YORK

ASSOCIATE MEMBERS

MOAT

NATIONAL
GEOGRAPHIC

The New York Times

REUTERS

TIME

THE WALL STREET JOURNAL

The Washington Post

Smithsonian

INTRODUCTION

The What's Next For Content-Led Marketing survey was conducted by the World Media Group, a strategic alliance of the world's leading media brands committed to promoting award-winning journalism and the role of international media. This is an annual Report, designed to explore how international content-led marketing strategies are adapting to new challenges and opportunities. This 2021 Survey looks back over a particularly challenging year for the world and so we have asked questions to explore the impact of the pandemic on advertising investment and how brands will adapt their storytelling.

Responses to the survey affirm that the crises of 2020 and the resultant economic challenges are having an impact on overall advertising budgets, but there is room for cautious optimism for the proportion of budgets allocated to content-led communications. Brands will be focusing investment on safe environments, with their own channels and trusted digital media environments likely to receive more investment. "Trusted" media environments are seen by the majority of our respondents as an important factor in ensuring brand safety – using the voice of the experts and positioning brand storytelling within an authoritative journalistic environment are seen as the most important factors for ensuring the impact and effectiveness of brand communications on ESG [Environmental & Social Governance] issues. 71% believe that credible and authentic storytelling relating to ESG issues provides a competitive advantage.

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ABOUT THE WORLD MEDIA GROUP

The World Media Group is an alliance of leading international media organisations that connects brands with highly engaged, influential audiences in the context of trusted and renowned journalism. Our members share the same values and principles, and we promote their many synergies whilst championing the role of trusted international media. www.world-media-group.com

ABOUT THE WORLD MEDIA AWARDS

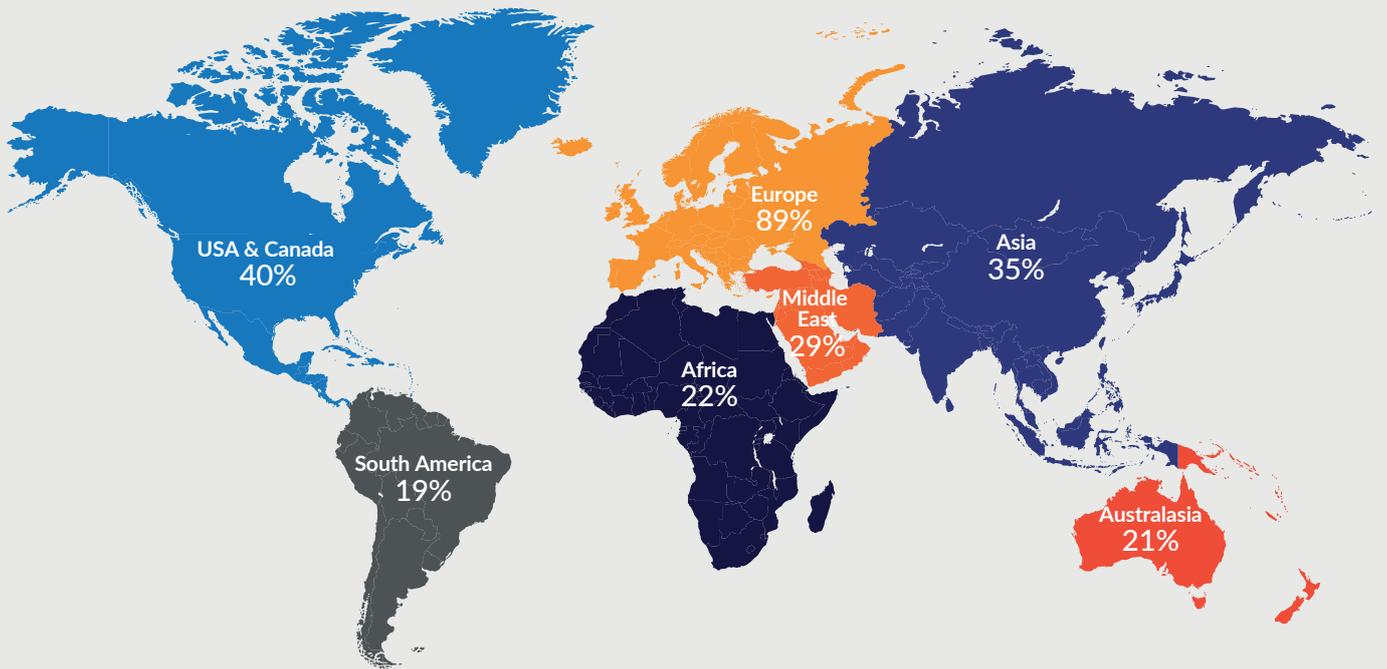
Organised by the World Media Group, the World Media Awards celebrate the creativity and effectiveness of cross-platform, cross-border, content-driven advertising. With an independent jury of international brand and agency leaders and content publishers, the Awards are recognised by the WARC Media 100. Our co-chairs for the 2021 Awards are Fabio Mancone, Chief Branding Officer and Partner at Lombard Odier Group, and Shula Sinclair, Global Head of Strategy for Spark Foundry. www.world-media-group.com/Awards



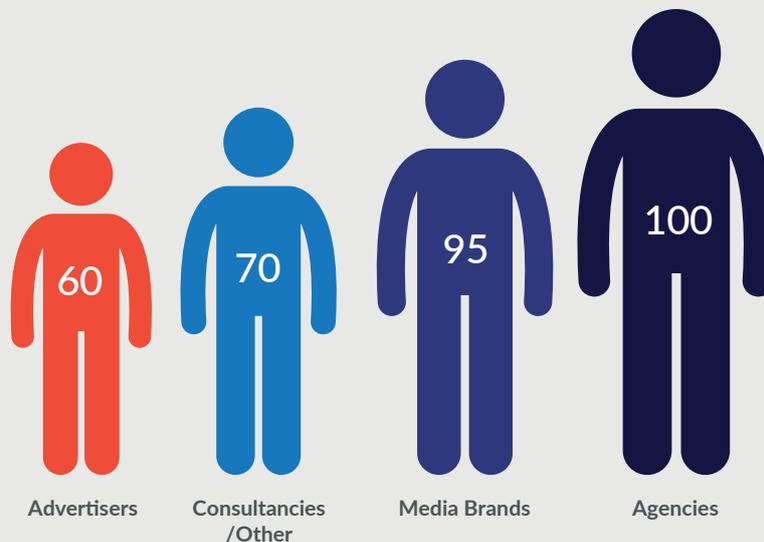
METHODOLOGY & RESPONDENT PROFILE

The Survey was circulated between 11 January and 19 February 2021 to advertisers, media owners, and agencies with international communication remits, and promoted via the World Media Group's social media channels. 325 responses were received, with 80% of delegates having worked on content-led campaigns designed to target multiple countries and with global responsibility.

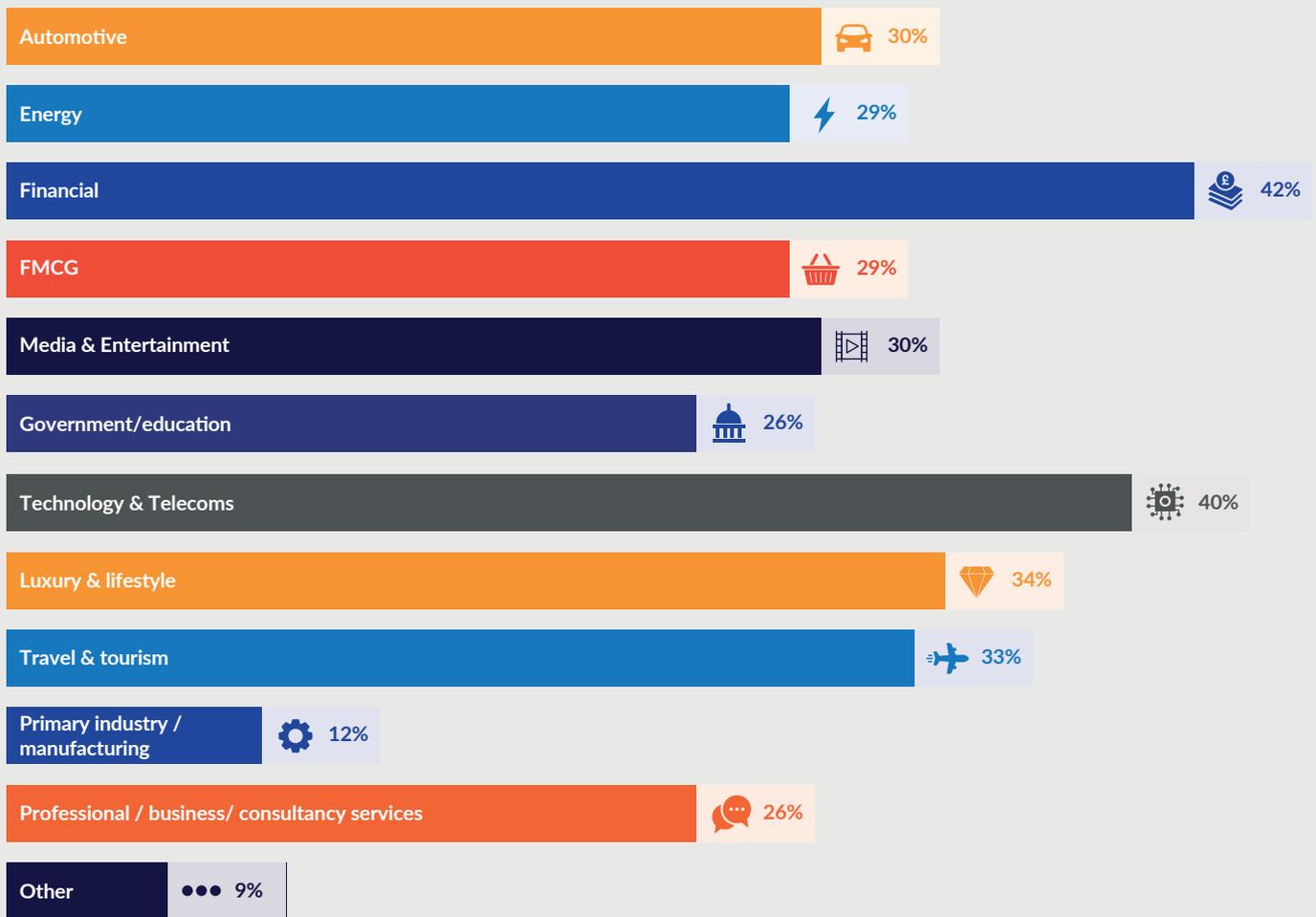
In which of the following regions are you involved / responsible for making decisions



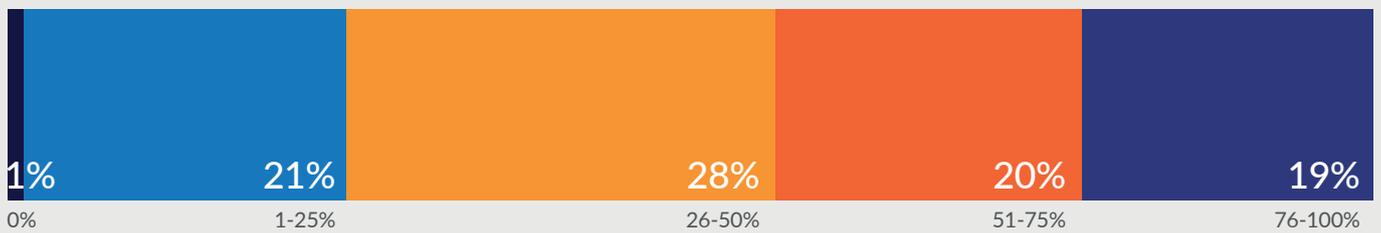
Our respondents work across the buy-and-sell-side in international advertising and represent marketing budgets for a broad range of business sectors.



Which broad business sectors do you / your clients work in?



What proportion of campaigns you work on include a branded content components?



AN OPTIMISTIC OUTLOOK FOR CONTENT MARKETING BUDGETS

Broadly there is agreement between advertisers and the media owners, agencies, and consultants who work with them on what happened to budgets in 2020. There is a slight divergence of expectation for 2021 – unsurprisingly advertisers have more certainty, and this certainty unfortunately suggested reduced budgets overall. However, a higher number of advertisers expect the proportion of budget allocated to content-led communication to increase or stay the same in 2021 versus who experienced an increase in this allocation in 2020.

What has happened to your / your clients' advertising /communications budget?

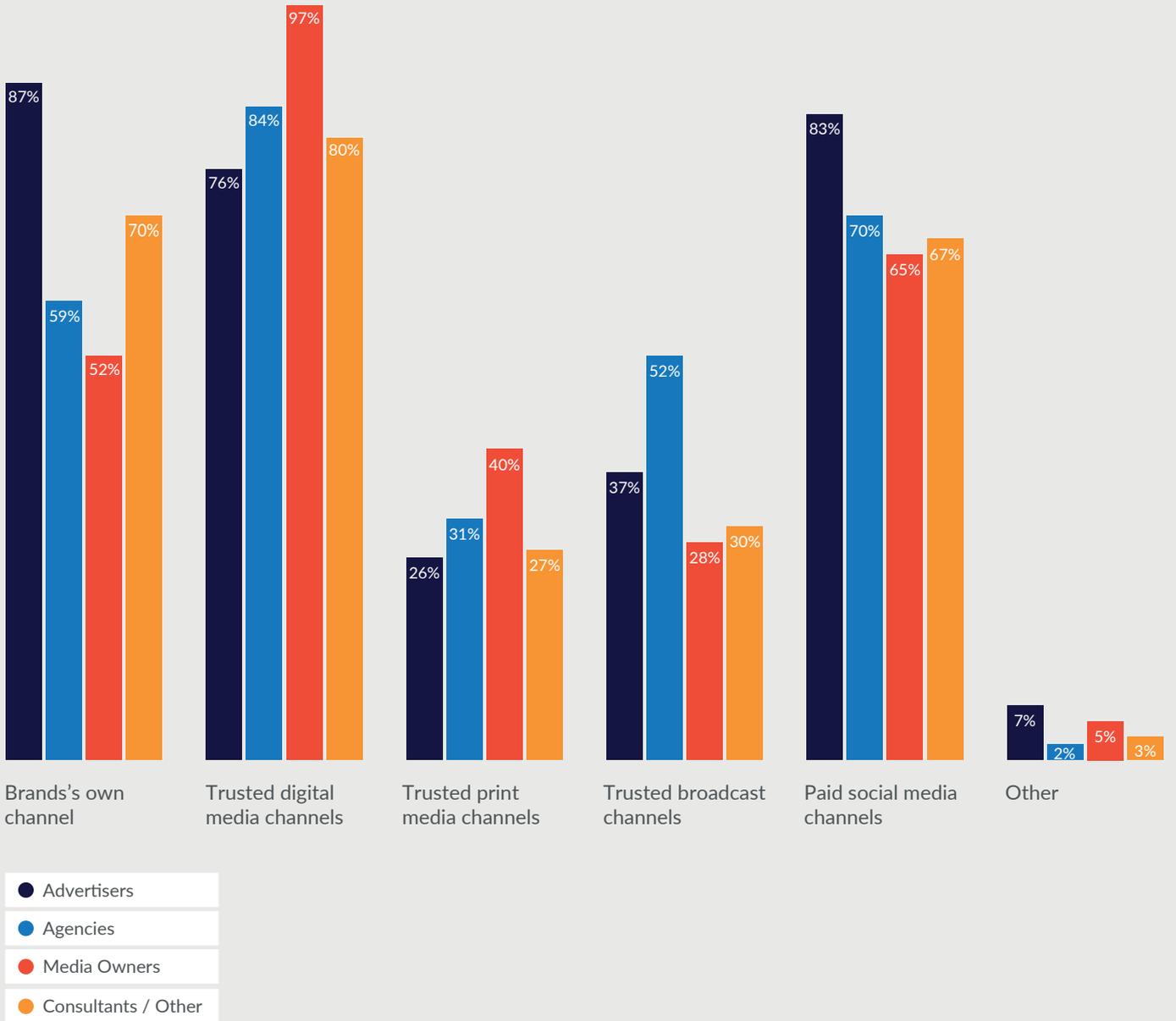
Overall Budget	Advertisers		Agencies, media owners, consultancies	
	2020	2021	2020	2021
Increased	15%	11%	14%	21%
Stayed the same	29%	38%	18%	26%
Decreased	54%	40%	57%	16%
Uncertain / decision delayed	2%	11%	11%	37%

Proportion on content-led advertising	Advertisers		Agencies, media owners, consultancies	
	2020	2021	2020	2021
Increased	23%	18%	24%	30%
Stayed the same	32%	40%	23%	26%
Decreased	43%	31%	42%	9%
Uncertain / decision delayed	2%	11%	11%	36%

When asked what platforms they expect to see benefit from investment to share or amplify brand storytelling in 2021, all respondents agreed that the three key areas for investment would be the brand's own channels, trusted digital media channels, and paid social media channels. Advertiser respondents suggested that most investment will go to the brand's own channels, closely followed by paid social media channels. Agencies, media owners, and consultants all suggested the greatest investment in trusted digital media platforms, with agencies and media owners putting paid social media platforms in second place, and consultants favouring the brand's own channels just slightly over paid social media platforms. Other platforms listed by our respondents included: podcasts, radio, PR, virtual events, existing sponsorships, and OOH.

Which platforms are you / your clients planning to invest in to share or amplify brand storytelling in 2021?

Please tick as many as apply.



THE IMPACT ON BRAND SAFETY

Given the social impact of the pandemic and the increasing potential for fake news to impact on how the world tackles it, plus the growing focus of media editorial on sensitive and important issues around diversity and inclusion, we asked respondents how this might have had an impact on approaches to brand safety. Just over 50% of advertisers said that the crises have not had an impact on approaches to brand safety – but with one respondent adding the comment that “we have maintained a very high bar for brand safety” this need not suggest complacency, it could suggest a continued focus. 50% of our respondents aligned on the intention to invest more in trusted media environments, and 25% are reassessing keyword blocking to ensure continued investment in sensitive but trusted media environments.

How have the crises changed your approach to brand safety?

Please tick all the statements that apply.

	All Respondents	Advertisers	Media Owner, Agency & Consultant Respondents
We are investing more in trusted media environments	50%	37%	54%
The crises have not had an impact on our approach to brand safety	37%	52%	33%
We are reassessing keyword blocking to ensure that we are still investing in sensitive but trusted media environments	25%	22%	26%
We are investing more in keyword blocking technologies	15%	13%	16%
Other	8%	6%	8.5%

Comments from our media owner and agency respondents who ticked the “other” box suggest that this continues to be a contentious issue...

“We are spray painting thoughtlessly”
Agency

“I am a publisher. Big clients [mainly through agencies] have blanket keyword lists that hurt publishers. It is still a blunt, opaque instrument for many”
Media owner

“More e-commerce at any cost – brand safety is still important but willing to turn a blind eye if ROI is positive”
Media owner

AN INCREASED FOCUS ON SOCIAL GOOD

We were interested to find out how the crises of 2020 have impacted on creative strategy and content-led communication. 84% of respondents believe that it is now more important and effective for brands to align themselves with social issues and messaging – and this figure is consistent across all types of respondent. 80% of advertisers confirmed that their organisation was committed to working towards the UN Sustainable Development Goals and / or is actively pursuing an ESG [Environmental-Social-Governance] focused strategy. 63% of our media owner, agency, and consultant respondents are seeing an increase in demand for creative solutions that communicate the client’s approach to meeting ESG goals. 53% of advertisers are leading with ESG strategy in marketing communications to consumers, whilst 24% are planning to. 32% are leading with ESG strategy in marketing communications to investors and policy decision-makers, whilst 18% are planning to. 71% of advertisers believe that brands which are able to lead with credible and authentic storytelling related to ESG issues have a competitive advantage.

84% of respondents believe brands should align with social issues and messaging

71% of advertisers believe that credible and authentic storytelling related to ESG issues provides a competitive advantage

If, as these statistics imply, brands are going to lead strongly on ESG, how can brands and their media owner and agency teams add impact and effectiveness to storytelling on these issues? For advertisers, it’s about using the voice of experts and having consistent communications across multiple channels. 47% also believe that brand storytelling should be positioned within an authoritative journalistic environment – this is the primary factor for media owners, agencies, and consultants, with 71% citing this as an important factor.

Which of the following factors do you believe add impact and effectiveness to brand storytelling around ESG issues for international audiences.

Please tick as many as apply.

	All Respondents	Advertisers	Media Owner, Agency & Consultant Respondents
Using the voice of experts	67%	74%	67%
Positioning brand storytelling within an authoritative journalistic environment	66%	47%	71%
Consistent communication across multiple channels	57%	68%	55%
Developing local messaging for different markets	40%	53%	37%
Creating and managing an open conversation with your audience	39%	38%	39%
Using the voice of popular influencers	21%	24%	21%
Other	9%	24%	7%

All respondents were keen to add comments to their answer to stress the importance of being authentic as a brand when communicating around ESG issues – the need to **“have real proof points of real world actions in this space, eg: demonstrating it’s not just a campaign”, “the real area of importance with ESG is actually having something to talk about and doing it well, not pushing out content on a hot topic because everyone else is”.**

EXCITING TRENDS IN CONTENT-LED MARKETING

Asked to predict the most exciting trends in content-led marketing over the next two years, our respondents provided a fairly balanced mix of forecasts around tech platforms, formats, and creative approach. The most frequently cited trend was the continuing growth of podcasts and audio formats. Clubhouse and the rise of other online communities were mentioned – how can brands make a play in this space? The pandemic has seen events of all kinds shift online and respondents envisage a continued exploration of brand activations in this space. And there was a divergence of opinion with respondents mentioning the need to “humanify” marketing and make it more personal, and others mentioning AI generated content.

INFLUENCER AND SOCIAL LED CAMPAIGNS

WITH THE RISE OF MORE ONLINE COMMUNITIES SUCH AS CLUBHOUSE, HOW CAN BRANDS MAKE A PLAY IN THIS SPACE?

SUSTAINABILITY

BRANDFORMANCE – GENERATING CONTENT AT SCALE AND GENERATING NATIVE CONTENT THAT FEELS WITH THE LOOK AND FEEL OF WEBSITES

WHO WILL SURVIVE WITH ALL THE CONTENT CREATED? WILL THE SIMPLE AND DIRECT PURCHASE-DRIVEN APPROACH FACE A RESURRECTION SOON?

GREATER USE OF AUDIO

SHORT CONTENT, EXPERTS, GET STRAIGHT THE POINT, ANSWER QUESTIONS – PERHAPS FROM AN ENGAGED AUDIENCE

INTERACTIVITY AND CUSTOMER PULL
USE OF TECHNOLOGY TO SCALE THE CONTENT

CREATING RICH AND VALUED CONTENT IS WHAT ENABLES BRANDS TO BECOME MORE RELEVANT FOR PEOPLE, AND ACTUALLY PROVIDE BETTER AND MORE VALUABLE EXPERIENCES

NEW CHANNELS PROVIDING NEW OPPORTUNITIES FOR CONSUMPTION/DISTRIBUTION (EG: GAMING) AND AN INCREASED DESIRE FROM CONSUMERS TO PAY SUBSCRIPTIONS FOR CREATORS/BUSINESSES TO PRODUCE NEW CONTENT

PODCAST SERIES, VIRTUAL EVENTS BRAND ACTIVATIONS

AR WILL BE HUGE

LONG FORM BRAND INITIATED CONTENT (EG: DOCUMENTARIES) ON VOD PLATFORMS, SOCIAL MEDIA FIRST NEWS AND JOURNALISM

CREATOR LED CAMPAIGNS

CREATING CONTENT PROGRAMMES AHEAD OF COP26 AND FOCUS ON ENVIRONMENTAL ISSUES AND SOLUTIONS TO 2030

POTENTIALLY E-COMMERCE WITHIN SOCIAL

GOING LIVE WITH VIDEO AND SEMINARS AND THE GROWTH AND TESTING OF AI POWERED CONTENT

TWO WAY COMMS AND INTERACTIVE CONTENT – THIS HELPS TO MAKE THE MESSAGE MORE RELEVANT AND GETS BETTER CUT THROUGH AS A RESULT EDITORIAL ALIGNMENT, INTERACTIVITY, 360 BESPOKE SOLUTIONS

FINALLY CLIENTS / BRANDS EMBRACING PODCAST SOLUTIONS; RETURNING TO MORE TRUSTED MEDIA; LESS BLINDLY RELIANT ON SOCIAL MEDIA

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