

UNDERSTANDING THE FUTURE FOR CONTENT-LED MARKETING AROUND THE WORLD

RESEARCH REPORT
NOVEMBER 2019



INTRODUCTION AND METHODOLOGY

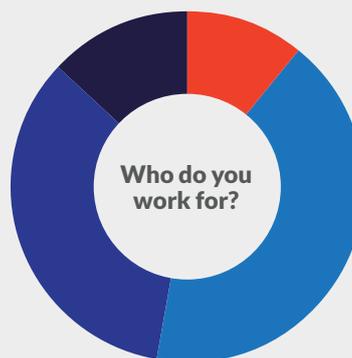
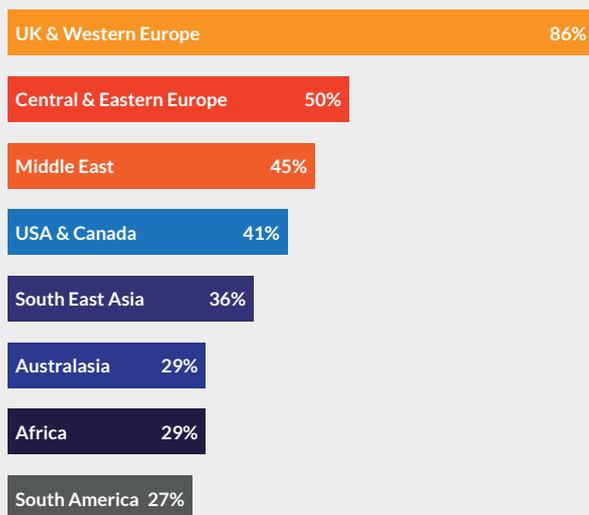
The Future For Content-Led Marketing Around The World survey was conducted on behalf of The World Media Group, a strategic alliance of the world's leading media brands who are committed to promoting award winning journalism and the role of international media. The objective of the Survey was to provide an update on the 2018/2019 Report and to expand the exploration of trends to provide a picture of how international content-led campaigns are commissioned and implemented.

The survey was circulated between 2 September and 7 October 2019 to advertisers, media agencies and media owners with international communications remits, and promoted via the World Media Group's social media channels. 269 responses were received, providing views from around the globe. Asked to describe their primary role, the largest number of respondents [44%] confirmed a planning/strategy role, with 11% working within client advertisers teams and 42% in agencies.

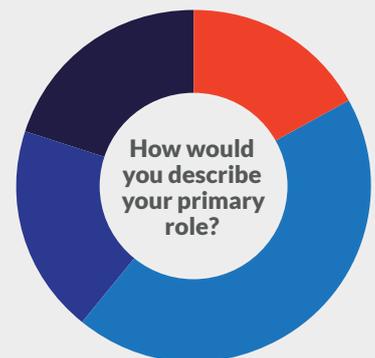
Breakdown of respondents

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

[Respondents selecting as many as appropriate]



Advertiser	11%
Agency	42%
Media Owner / Content Studio	34%
Consultancy	13%



Creative / Content	17%
Planning / Strategy	44%
Sales	19%
Other	20%



This survey was conducted to provide insights for the strategic development of The World Media Awards, organised by The World Media Group to celebrate great international, content-led advertising strategy.

The World Media Awards are judged by an independent Jury of advertisers, agency representatives and content experts working within media owners. The World Media Awards are recognised by the WARC Media 100 [successor to the Gunn Media 100] which tracks the performance of campaigns, brands, and agencies in advertising media competitions around the world. 2019 Award winners include leading international brands such as Fox Networks, Audi, Credit Suisse, Amgen JAPAC, Deutsche Bank, and Formula 1.

The deadline for 2020 entries is 6 February 2020. For more information, please visit www.world-media-group.com/Awards

The 2020 Awards invite entries in sector categories: Automotive; Corporate Influencer; Financial Services; Luxury, Lifestyle & Fashion; Media & Entertainment; Tech & Telecoms; and Travel & Tourism, as well as entries for the best Brand / Media Owner Partnership. In addition, the Awards recognise an individual working for an international advertiser in the Content Leadership & Innovation Award.

SUMMARY

The clear conclusion to be drawn from the 2019 Future of Content-Led Marketing Around the World survey is that advertisers, agencies, and media owners expect to see a growth in content-led marketing, with **80% of respondents to the survey predicting growth over the next two years**. The content formats that will drive this growth include voice technology, AR, VR, audio and podcasts, personalisation. These are the formats that most respondents expect to use more in the next 12 months than they have in the past 12 months.

From the verbatim responses predicting the most exciting trends in content-led marketing, whilst the new technologies available to marketers are mentioned, there are also many assertions that the real opportunity for brands is to align themselves with issues and to be seen to be addressing societal and environmental problems. **Brand or content activism is seen as a key route to engaging consumers**.

And engagement is key: cited most frequently as the marketing objective that a content-led approach is best for, followed closely by the opportunity to change perceptions. The KPIs that marketers are setting for content-led campaigns better reflect this desire to engage than responses to last year's survey suggested. Respondents are **measuring shifts in brand perceptions, and time spent with content above other metrics**.

43%

of advertiser respondents think they are best placed to lead on media strategy

57%

of survey respondents cited that working with a media owner who can offer a trusted, credible editorial environment is key

87%

of our respondents have responsibility for content-led campaigns targeting multiple countries

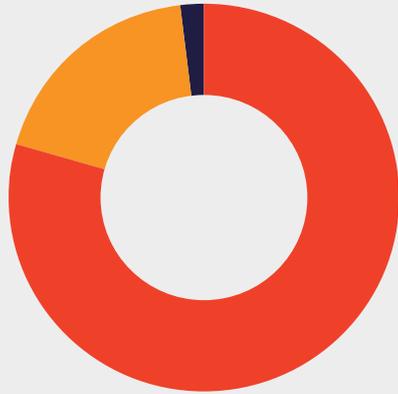
Creating and implementing a content-led marketing campaign can be a complex task. Our respondents work with a greater number of partners [an average of 4.5] on content-led strategies vs an average of 3 partners on communication strategies without a content element. Responses to the survey from advertisers, agencies, and media owners also suggest some differences of opinion in terms of who is best to lead on the different elements. A higher percentage of our advertiser respondents think they are best placed to lead on media strategy [43%] than the percentage of total respondents who thought this [14%]. Similarly, 26% of advertiser respondents vs 15% of total respondents think that advertisers are best placed to lead on social and PR strategy – perhaps **reflecting an industry trend toward the “in-housing” of media** by brands.

Working with a media owner who can offer a **trusted, credible editorial environment** is seen as key by over half [57%] of the survey respondents, the most cited quality of a preferred media partner on content-led marketing campaigns.

With 87% of our respondents having responsibility for content-led campaigns targeting multiple countries, the survey offers an insight into how brands are approaching international strategies. The majority, 71%, adapt the global storytelling for local markets rather than applying a single global strategy, and 61% adopt a mix of English and local language. The most frequently cited key to successful international content-led marketing was to **identify global values, themes, and trends, and find the relevancy for each local market**.

FORECASTING GROWTH

For the second year, this survey has confirmed the belief that investment in content-led marketing and advertising strategies will continue to grow. 79% of all our respondents believe that content-led marketing campaigns will continue to grow over the next two years. A lower percentage of respondents this year [2%] forecast a decline versus last year [4%].



Do you think that content-led campaigns over the next 2 years will grow, stabilise, or decline?

● Grow	79%
● Stabilise	19%
● Decline	2%

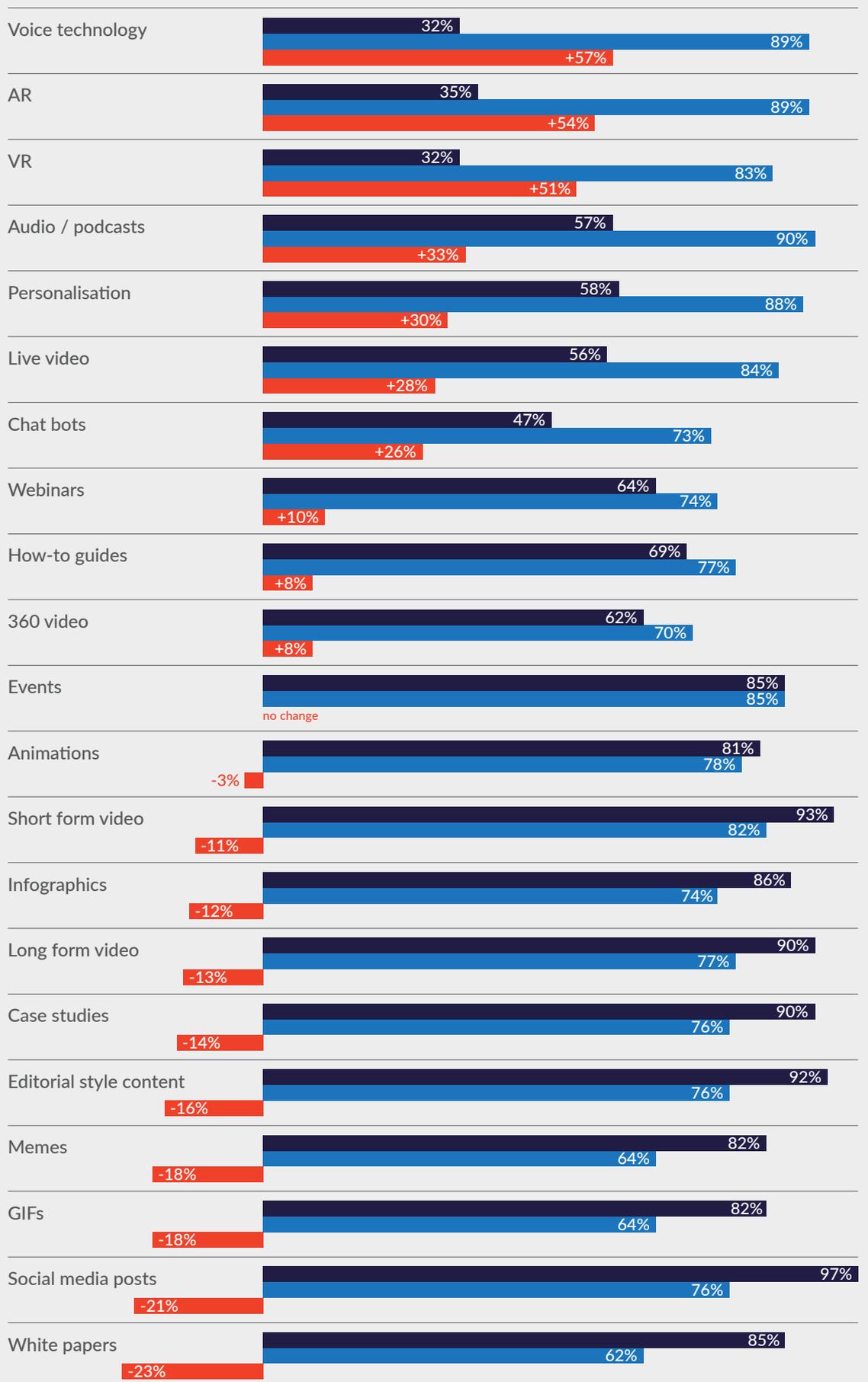
THE NEXT BIG THING IN CONTENT-LED MARKETING

When asked more specifically about the types of content they had used in the past 12 months, and the types of content they expect to use in the next 12 months, the responses indicate the greatest growth in use of voice technology, AR, VR, podcasts and personalisation. We can see an expected growth in live video and 360 video, and a reduction in short-form and long-form video.

We asked our respondents to tell us what they felt were the most exciting trends in branded content campaigns: the most frequently cited developments were voice technology, podcasts, video personalisation, AI, augmented reality [AR] and virtual reality [VR]. There was also a consistent theme in the responses stressing the opportunity for brands to align themselves with key issues and trends, to demonstrate a brand's commitment to societal and environmental challenges – this survey would suggest that “brand activism” or “content activism” is set to grow.

What type of content have you used in the last 12 months and which do you think you will use in the next 12 months?

- Last 12 months
- Next 12 months
- Difference



What are the most exciting trends you expect to see in branded content in the next two years?

The continuing drive for brands to be seen to be doing something for the environment and wider society eg. inclusion, diversity, sustainability etc.

Content activism - content as a tool for addressing social and environmental problems. Also...as personalisation increases and audiences reach saturation point, the quality of content and the usefulness of it will need to keep up with higher and higher expectations. Formats like VR and Chatbots - will no doubt reach tipping point and become universally available - EEG technology will also come on stream - taking away the friction of pressing a button or a switch - leaving more space for content to tell a truly immersive story.

We know that over 70% of brands can disappear and consumers would not care. You need for your brand to be in the 30%, and to be meaningful (making a societal contribution and providing well-being to the consumer).

Content that is platform agnostic - not created for a specific platform, but able to adapt to be consumed wherever. The idea that we create specific content types suited to specific platforms is becoming obsolete.

Brands as trusted knowledge safe havens: facts-based content campaigns will increase the attractiveness of brand websites as credible expert knowledge hubs amidst the perceived message overload across multiple channels.

A diversification in voices and publications will lead to a much richer landscape for both brands and publishers to exist in. The more that brands (and the publishers hoping to serve them) understand that consumers are becoming less and less "brand loyal", the more exciting work can be done, constructing multi-faceted and layered approaches and identities for consumers to engage with.

Co-branding / partnerships with video/ social media/gaming platforms... Retail/In-store branded content, at a time where all the focus is on digital but brands like Sephora are more innovative than ever with brick-and-mortar content happenings.

Personalisation at scale, blending of content and commerce, more AR/live content experiences.

An increase in converged content across multiple platforms - more use of video and infographics for social sharing - use of content for employer branding differentiation as the rise of profits for purpose increases.

How video / film will be a central part of the execution and how story telling will be a fundamental part of all campaigns.

Media metrics performance changing the way creative is shaped for campaigns.

ALIGNING OBJECTIVES AND KPIs

Asked what a content-led campaign is best for, “Brand engagement” was the most popular response, with 34% citing this benefit, closely followed by “Changing perceptions” at 20% and “Aligning a brand with a trend, issue or topic” at 18%. Whilst there was consensus between all correspondents on these top three objectives for content-led marketing, it’s interesting to see a divergence of opinion between advertisers, agencies, and media owners on how effective content-led marketing is at delivering on some other objectives. Agency respondents were the only type of respondent who suggested that content-led marketing was good for lead generation [4% of agency respondents], and more advertisers than agencies or media owners said “increasing purchase intent”.

What do you think a content-led campaign is best for?

[Respondents selecting one]

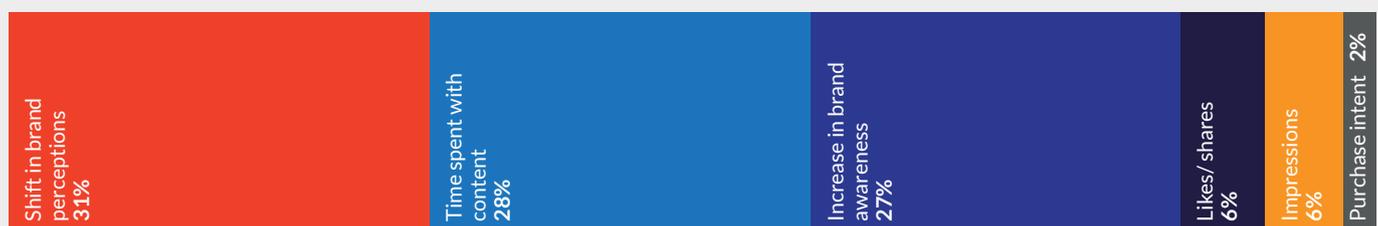
	All respondents	Advertisers	Agencies	Media Owners
Brand engagement	34%	35%	35%	33%
Changing perceptions	20%	22%	23%	20%
Aligning a brand with a trend / issue / topic	18%	17%	15%	17%
Building awareness	11%	13%	9%	15%
Thought leadership	10%	9%	8%	11%
Increasing purchase intent	3%	4%	1%	3%
Lead generation	1%	0%	4%	0%
Other	3%	0%	5%	1%

Signs of a maturing market

In the 2018/2019 survey, we discovered a mismatch between what our respondents perceive to be the best outcomes for content-led marketing and the KPIs that are set to evaluate success. Whilst brand engagement was the most popular objective, the most popular metric was an increase in brand awareness and engagement metrics were cited less frequently. For this year’s survey, there is a better match between what content-led marketing is perceived to be good at, and how content-led marketing campaign results are measured. Whilst brand awareness is still an important metric [at 27%], the most popular KPIs are a shift in brand perceptions at 31%, and time spent with the content, at 28%.

For the most recent content-led campaign you worked on, what was the main KPI?

[Respondents selecting one]



IMPLEMENTING CONTENT-LED MARKETING — WHO LEADS?

Unsurprisingly, responses to the survey demonstrated that content-led marketing campaigns can require more complex partnerships than “traditional” advertising. Our respondents work with an average of 3 partners where there is not a content component, and 4.5 partners on content-led marketing.

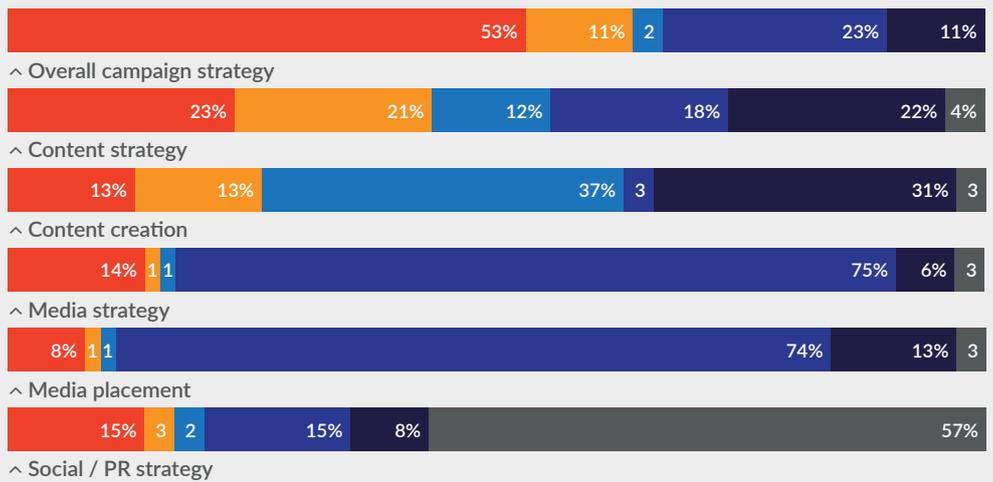
To dig deeper into how content-led marketing campaigns are implemented, we asked our respondents to suggest who was best at leading on specific aspects – the advertiser, the media owner, or what type of agency or consultant? There was clear agreement that the advertiser brand team or in-house agency were best placed to work on overall campaign strategy - 53% of respondents voted for this, with the next most popular choice being the media agency at 23%.

It’s interesting to see that the brand /in-house team, media owner content studios, and creative agencies received an almost equal number of votes as best for content strategy [23%, 22%, and 21% respectively].

Content creation studio and media owner content studios then take the lead on content creation - 37% stated content creation studios are best for this, and 31% suggested media owner content studios as best at taking the lead on this.

A content-led campaign can require a more flexible approach with multiple partners involved. In your experience, who would you say is best placed to lead on the following aspects:

- Brand / in-house
- Creative agency
- Content creation
- Media agency
- Media owner / content studio
- PR / social agency



Unsurprisingly media agencies are seen as best to lead on media strategy with 75% of respondents suggesting this, but interestingly - when the advertiser responses are looked at separately - more advertisers say that they are best to lead on media strategy than the average of the total respondents. 43% of advertisers think brand/inhouse should lead on media strategy versus an average of 14% of all respondents thinking this.

What do advertisers believe brand/in-house are best at vs. what average of total respondents believe?



FINDING THE PERFECT MEDIA PARTNERS

We asked our respondents what top three factors influence their choice of media partner for a content-led marketing campaign. In this age of mistrust and “fake news”, 57% of respondents were most interested in a media partner that offers a trusted, credible editorial environment. The other top factors were profile of audience, cited by 52% of respondents, and the quality of audience engagement, cited by 49% of respondents.

Media owners believe that a trusted, credible editorial environment was the most important selling point, followed by the profile of their audience, and their ability to target a global audience. They also believe that having a renowned content studio is important – with 24% suggesting this.

Whilst advertisers and agencies agree on the importance of a trusted, credible editorial environment, the profile of the media owner’s audience was equally important to advertisers, and more important to the agencies.

Finally, it’s possible that media owners are failing to see the opportunity of selling through original research and insight – only 7% of media owners chose this as an important factor, whilst 17% of advertisers said that they look for media partners who can offer original research.

When selecting a lead media partner, what do you look for?

[Respondents selecting the top 3 factors]

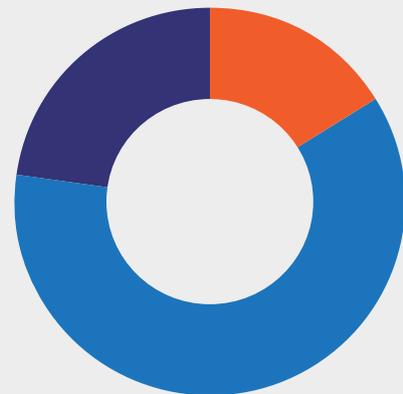
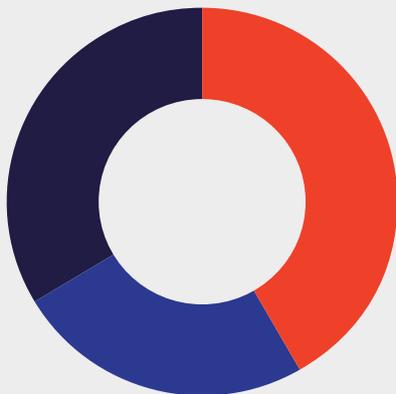
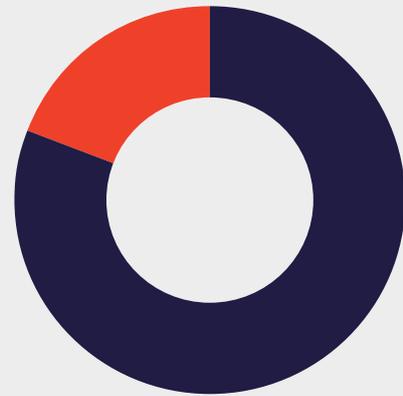
	All respondents	Media owners	Advertisers	Agencies
Offers a trusted credible editorial environment	57%	67%	52%	56%
Profile of the audience	52%	41%	52%	63%
Quality of audience engagement	49%	52%	43%	42%
Size of the audience	21%	12%	22%	28%
Global audience	16%	25%	9%	12%
Has a renowned content studio	13%	24%	0%	9%
Offers original research	11%	7%	17%	10%
A strong social presence	9%	11%	4%	8%
Offers the latest visualisation techniques, such as VR	1%	1%	4%	1%

THE SECRETS OF SUCCESS FOR INTERNATIONAL CONTENT-LED MARKETING

87% of the respondents confirmed that they work on content-led campaigns designed to target multiple countries, providing us with the opportunity to explore trends in approaches to international audiences.

There's a clear "think global, act local" dynamic: 71% of respondents adapt the global story for local markets, and 61% create content in a combination of local language and English [versus 22% all in English and 16% only using local language].

We have already seen that working on content-led campaigns requires more partners than campaigns without a content element – working internationally, with an act local approach, could create an even more complex ecosystem of partners. This appears to be where international network agencies provide the favoured route to market: 81% of respondents work with international network agencies vs multiple local agencies. To reach audiences with content that speaks to them, our respondents work with a greater variety of media owners – less than half [42%] work primarily with a single media owner.



We asked respondents to share their views on the secrets of success for content-led campaigns that effectively engage audiences across geographical boundaries. Consistent throughout the individual comments was an emphasis on global themes made locally relevant. We're delighted to close this report with a selection of some of the respondents' recommendations.

A focus on global themes and trends... In a world of increasing globalisation, there is a demographic of business leader that is specifically looking for the global story. If they want a regional or national construction, then they would use a more local news source.

Ensure relevancy in each region by content and image tweaks so the audience feel this has not been created by another country without them in mind. This means content must be checked for relevancy by local players in key geographic regions.

Focus on human values to drive engagement. These translate across borders and you can easily buy in to the ethos of a different cultural ad, or it can be remade within a local market.

People are connected by passion points, if you speak to these areas you can engage audiences from many different countries.

How it is localised. Universal truths and insights taken and shaped for that audience and region is key.

Be audience-led based on real consumer insight. What the consumer actually wants whether that's inspiring, informing, or involving - not what the client or agency thinks they want.

Identifying a shared platform of behaviours that is agnostic of the region and speaking to that. Also, doing regional research and regional testing to both arrive at a global hypotheses and prove it is correct, or at least likely to be correct.

Think audience first, not brand, and find natural, unobtrusive ways of integrating the brand or product. If the audience enjoy the content, they will give it their time and permit a brand to also be a part of the message.

CONTACT

Belinda Barker

belinda@world-media-group.com

