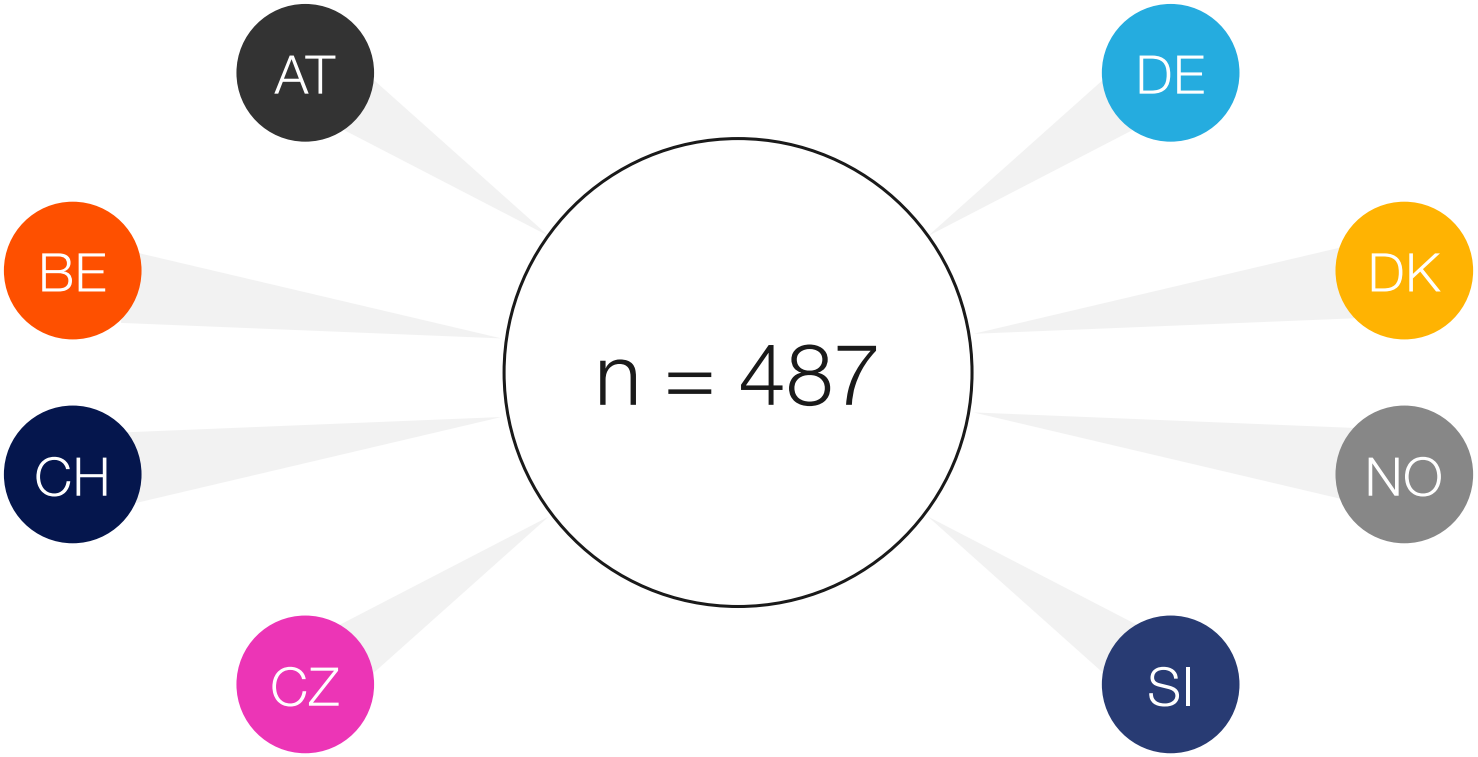
Scion

Content Marketing and Content Distribution: Current State and New Perspectives

Pan-European ICMF Barometer 2019

The ICMF Barometer surveyed nearly 500 communication executives (n = 487) in eight countries to explore the state of content marketing and its future at international level.



ICMF | Scion (2018) | ISO 3166 country codes, countries in alphabetical order

The study is based on a common definition of content marketing.

Content marketing is defined as a marketing approach that is focused on creating and distributing valuable and relevant editorial content to drive strategic business objectives.

Content Marketing …

- includes corporate, brand, product and employee communications
- strives for significant measurable impact
- includes continuous and temporary communications initiatives.

Content
marketing
investments
Email

In the countries investigated in this study, companies invest EUR 9.4 billion per annum in content marketing.

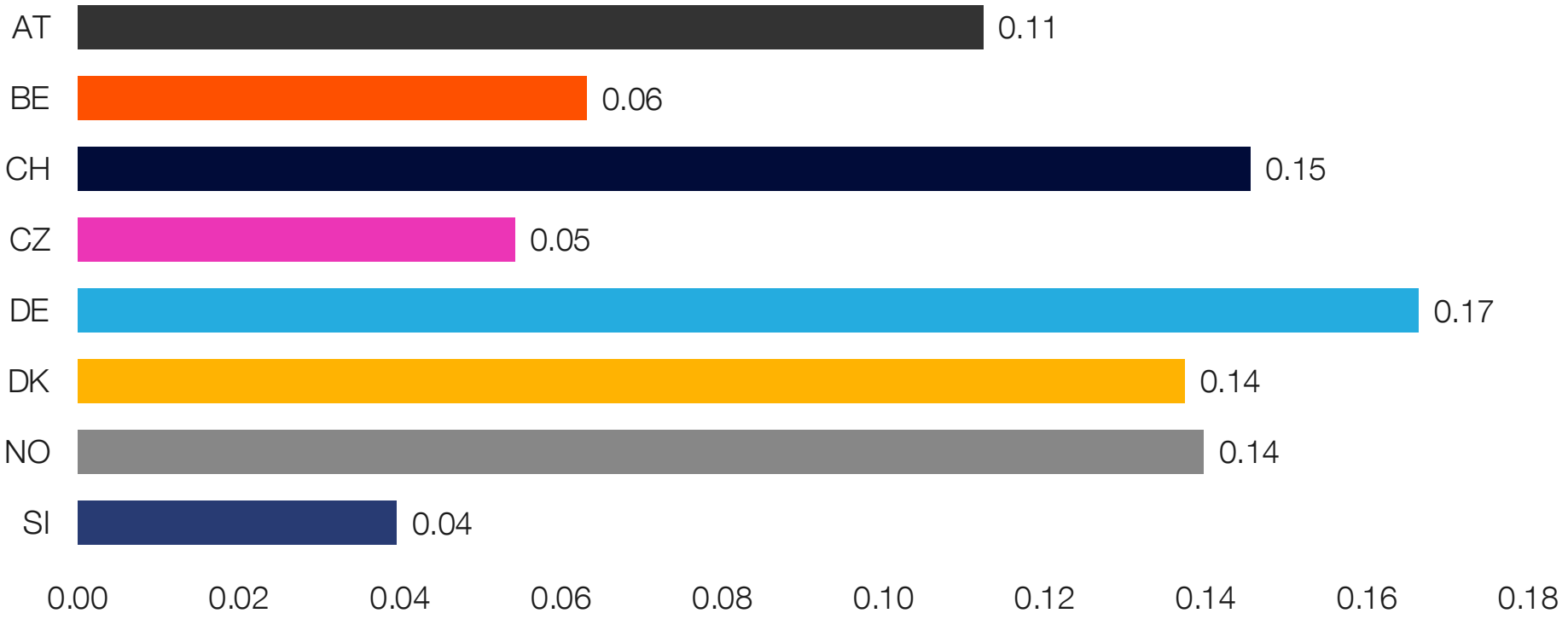
9400

ICMF | Scion (2018)

With regard to total content marketing investments, Germany, Switzerland and Austria are the largest markets.

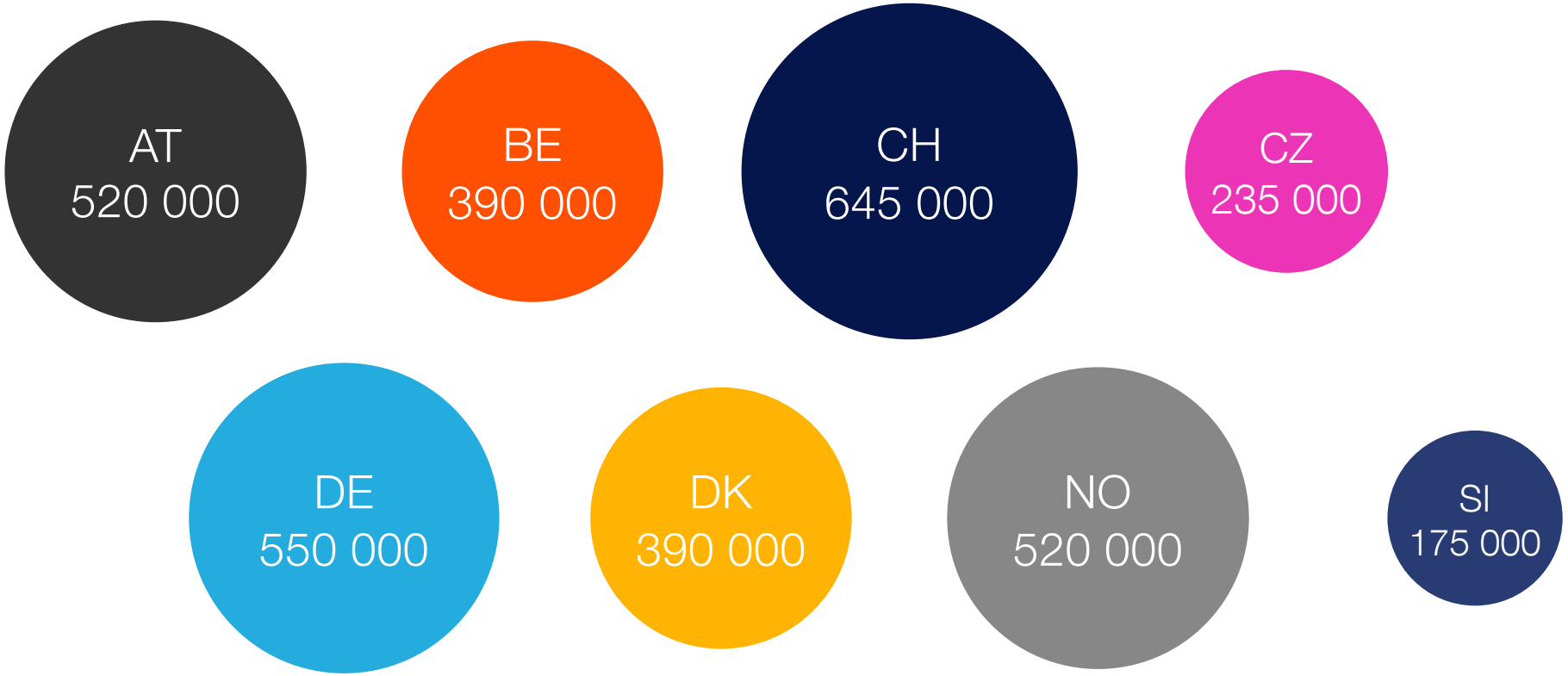
ICMF | Scion (2018) | areas of the treemap rectangles are proportional to the countries' content marketing investments

In terms of content marketing intensity, Germany, Switzerland and the Scandinavian countries lead the pack.



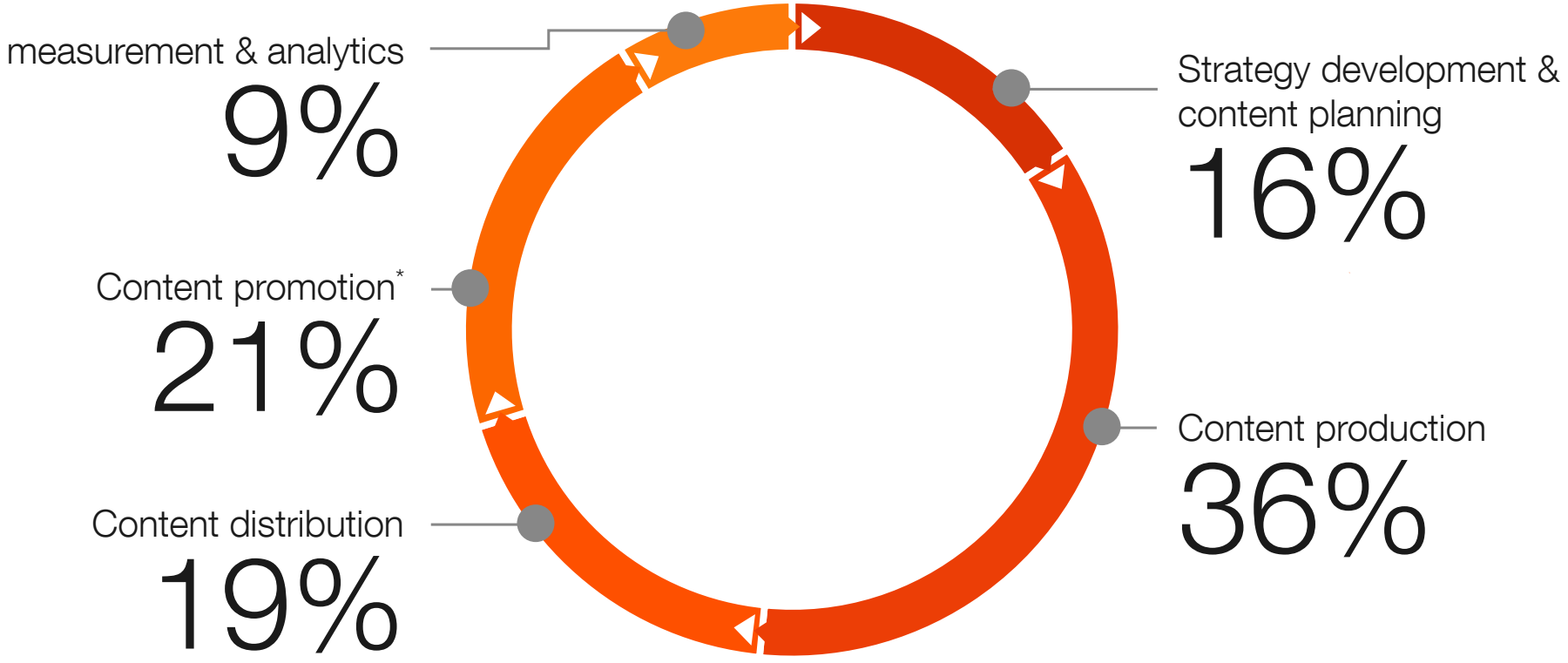
ICMF | Scion (2018) | gross domestic product (GDP) data: OECD (2018) | countries in alphabetical order

The mean annual content marketing budgets are highest in the German-speaking area and Norway, followed by Belgium and Denmark.



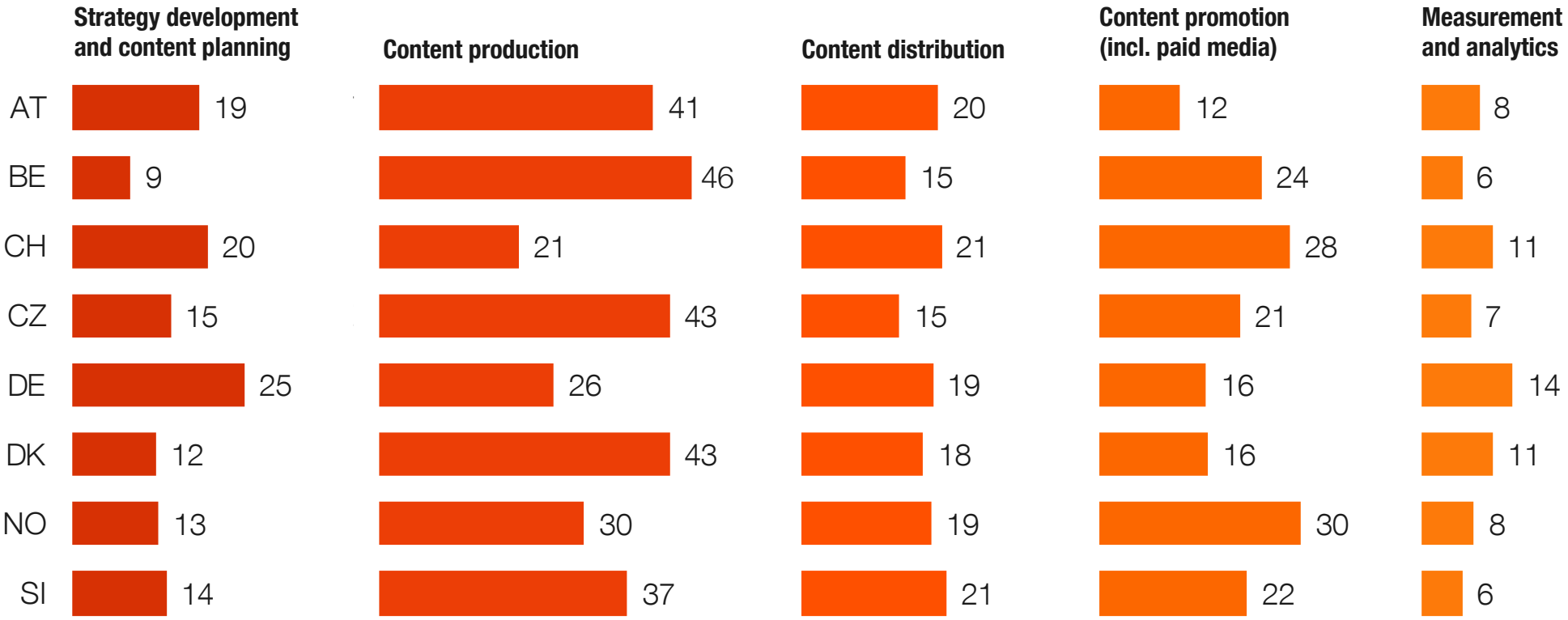
ICMF | Scion (2018) | countries in alphabetical order

On a Pan-European level, on average slightly more than half of the investments are accounted for by strategy development, content planning and content production.



ICMF | Scion (2018) | total may differ from 100% due to rounding | * incl. investments in paid media

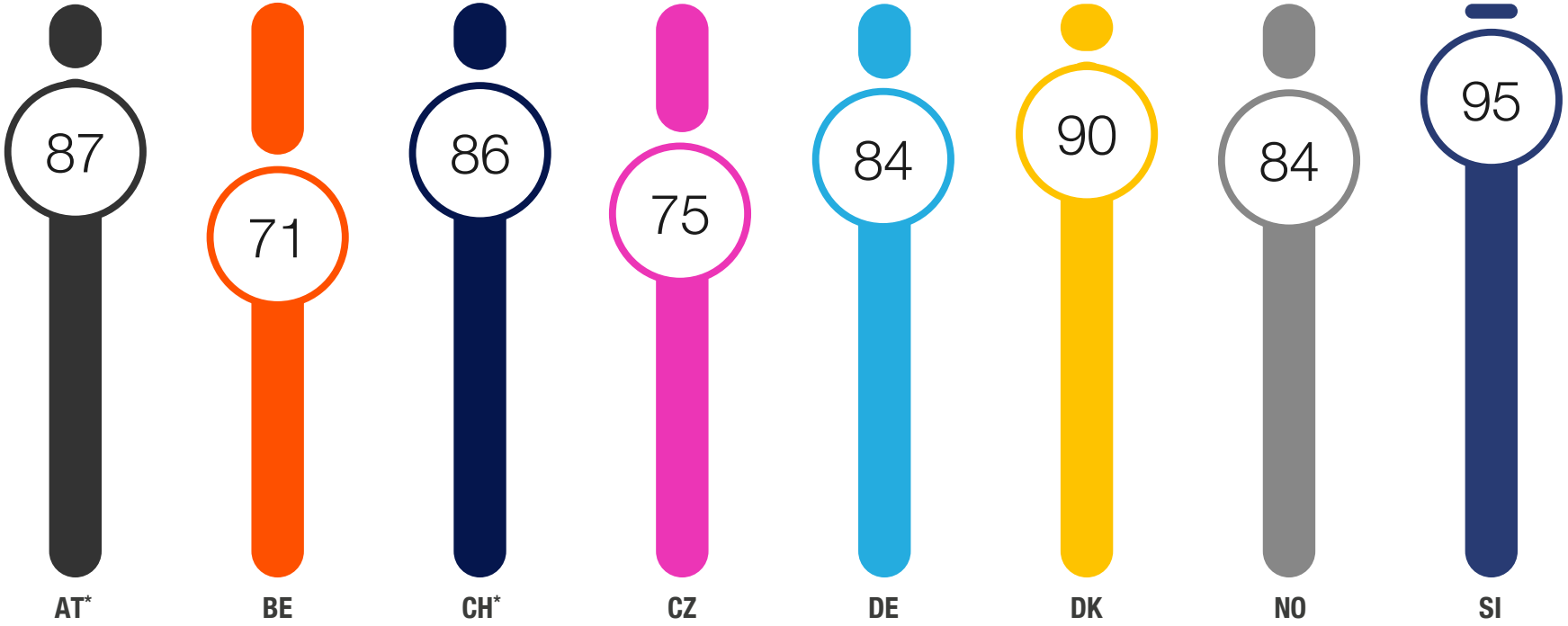
Strategizing and planning is most pronounced in DE, content production accounts for large budget shares in BE, CZ and DK. Promotion attains large proportions in NO and CH.



ICMF | Scion (2018) | % of total budgets by activity | totals may differ from 100% due to rounding | countries in alphabetical order

Content marketing is well-established in the communications mix and there is widespread unanimity among executives that it will continue to gain in importance.

In the future, content marketing will become a more important element in our communications mix.

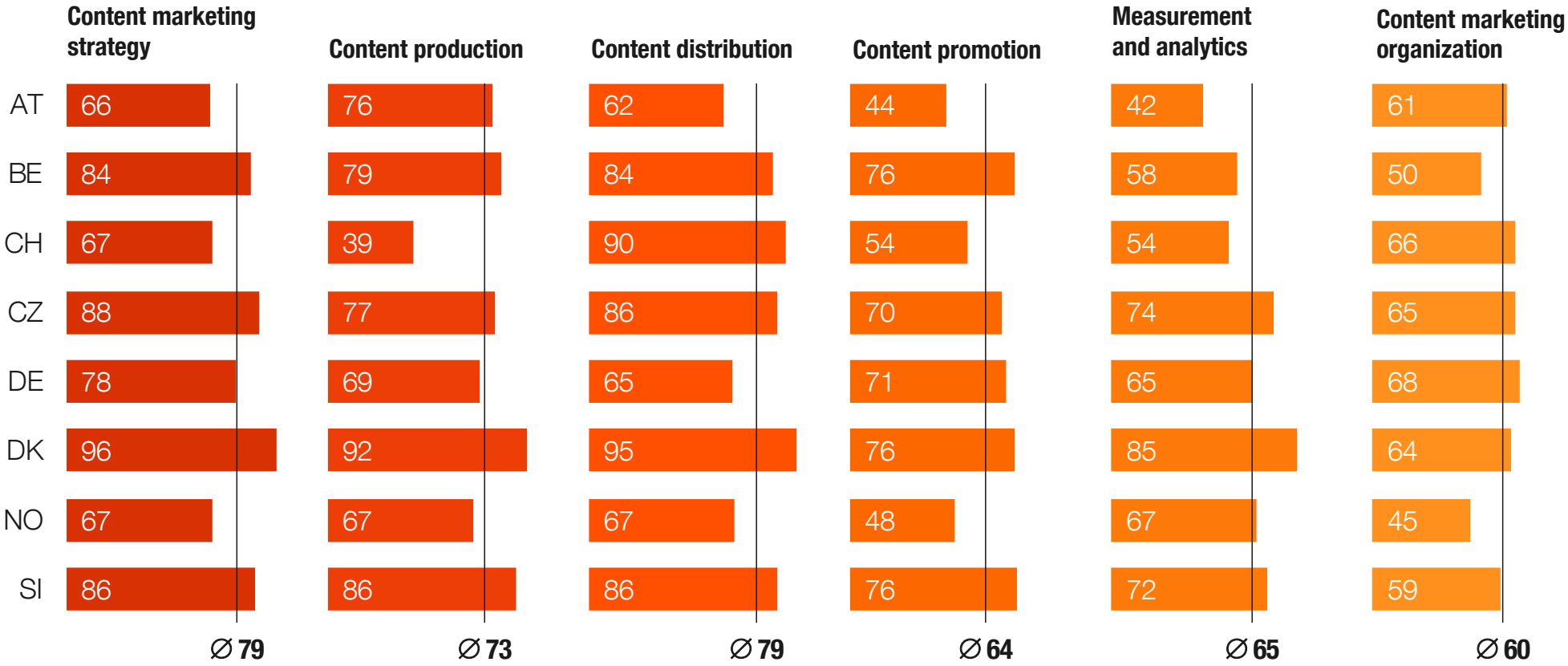


ICMF | Scion (2018) | figures in % of respondents; top 2 boxes: applies (completely) | * note: small sample | countries in alphabetical order

At international level, the entire CM cycle and CM organization are seen as relevant – there is no easy way to be sustainably successful at CM. Particularly critical: “strategizing” and “distribution”.

ICMF | Scion (2018) | figures in % of respondents; top 2 boxes: decisive, very important

Although there are differences between the countries, it is widely acknowledged that the entire CM cycle and organization are relevant.

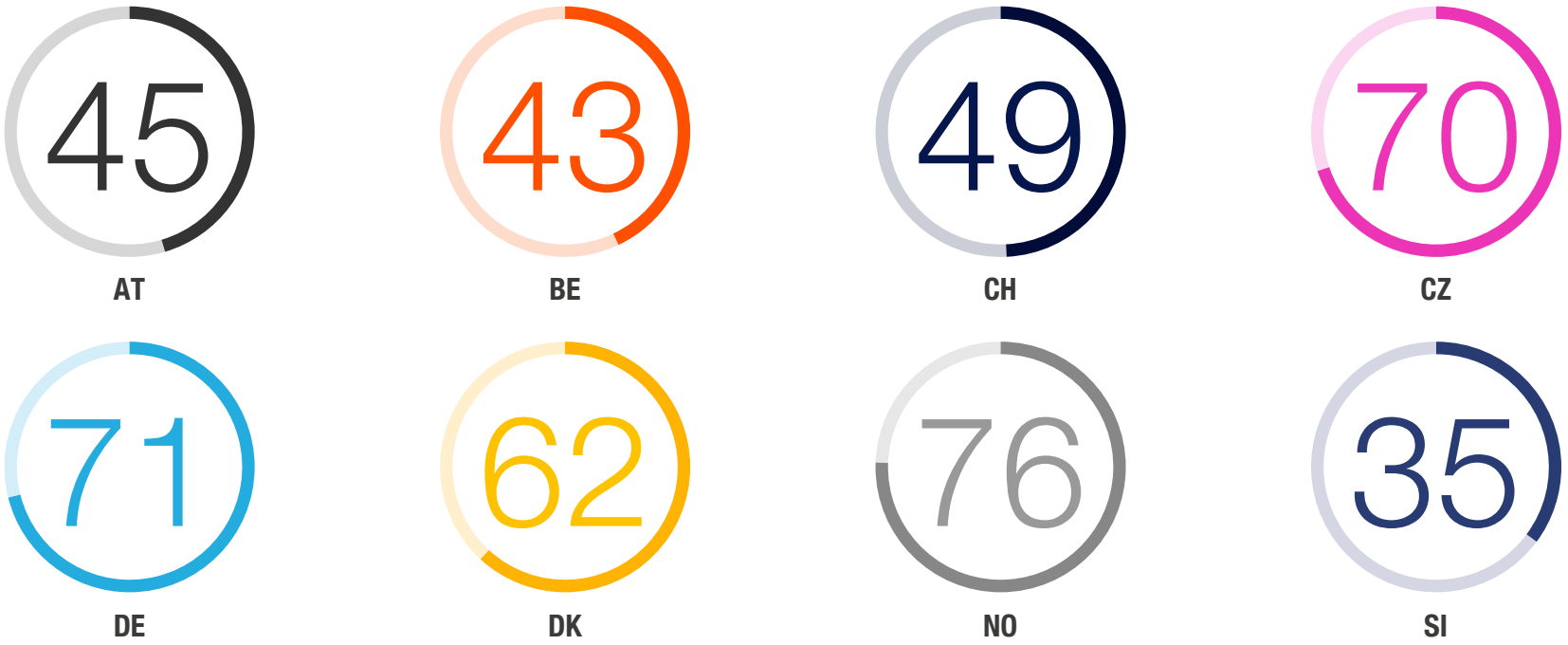


ICMF | Scion (2018) | figures in % of respondents; top 2 boxes: decisive, very important | countries in alphabetical order

Content
marketing
strategy

The degree of strategic maturity varies considerably: Depending on the country, 35-76 percent of the companies have a clearly defined content marketing strategy.

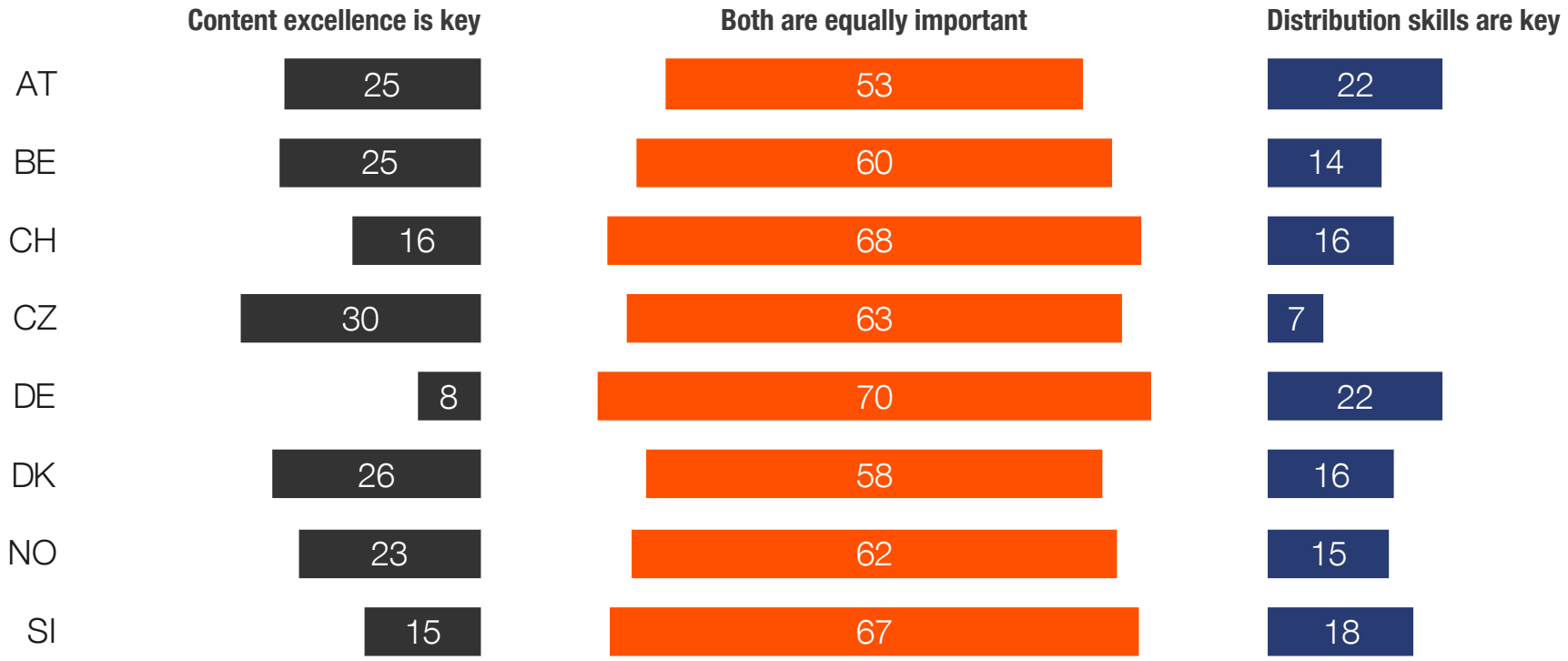
Our company has a clearly defined content marketing strategy.



ICMF | Scion (2018) | figures in % of respondents; top 2 boxes: applies (completely) | countries in alphabetical order

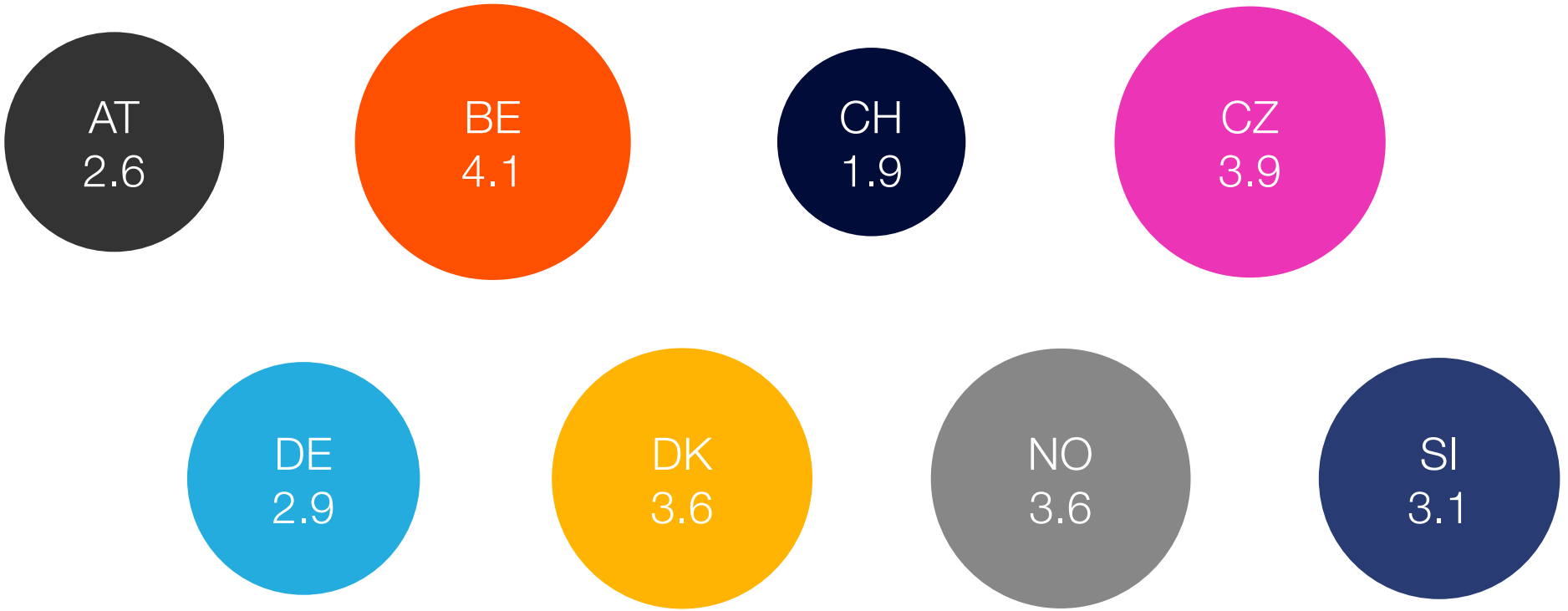
Content
distribution and
promotion

It is widely acknowledged that “one-winged birds can't fly”: Successful content marketing requires content excellence as well as profound distribution skills.



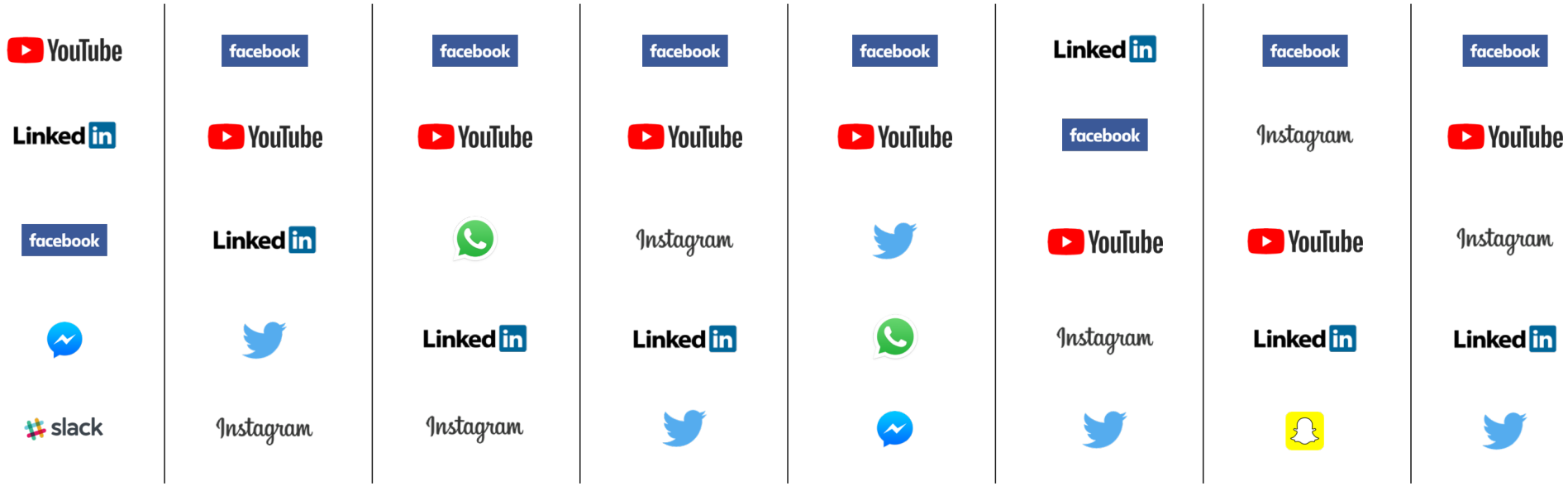
ICMF | Scion (2018) | figures in % of respondents | totals may differ from 100% due to rounding | countries in alphabetical order

BE, CZ and the Scandinavian countries are leading the field in using social media platforms for content marketing.



ICMF | Scion (2018) | countries in alphabetical order

Facebook is used most frequently in six of the eight countries. Together with YouTube, it is always among the top three. Instagram and LinkedIn also rank repeatedly among the top of the list.



ICMF | Scion (2018) | countries in alphabetical order

Content distribution: social media platforms used for content marketing purposes (percent of companies)

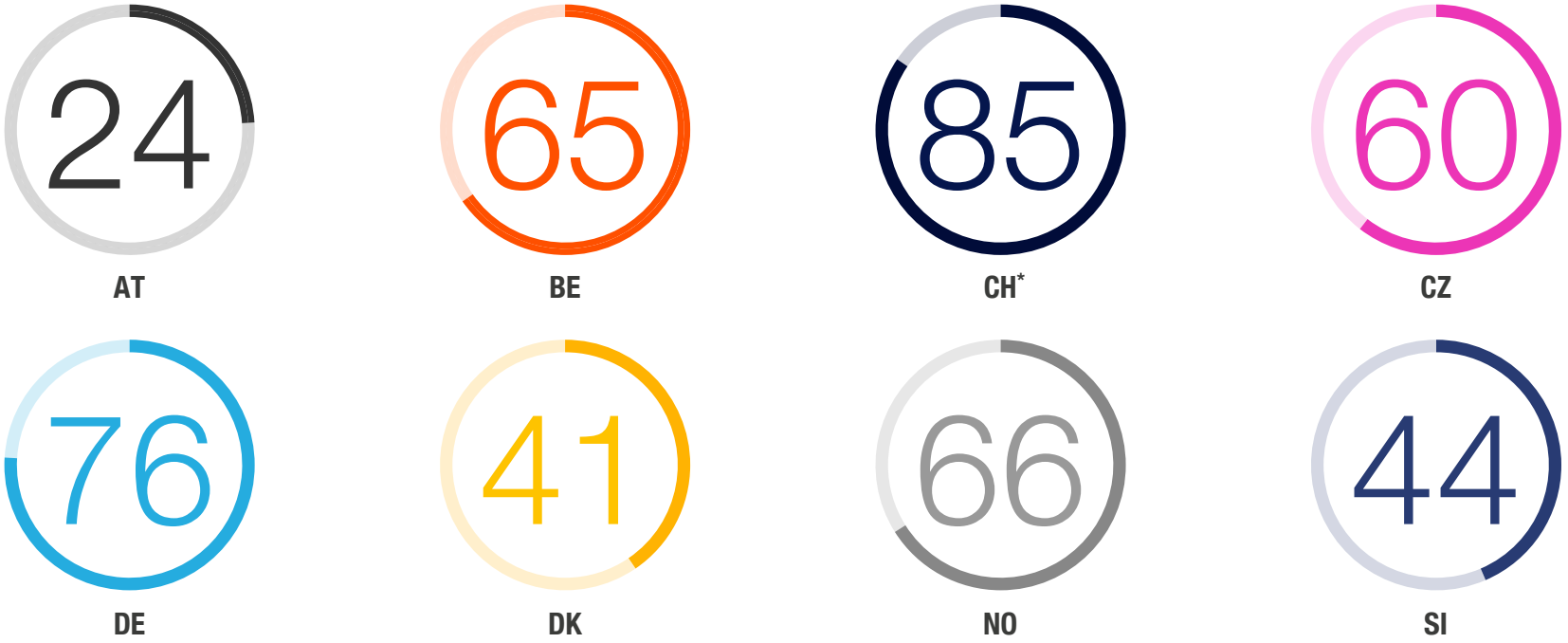
A closer look at the figures reveals considerable differences in the usage ratios at international level.

	AT	BE	CH	CZ	DE	DK	NO	SI
facebook	36	87	39	95	51	80	82	61
YouTube	50	80	29	67	38	70	65	57
LinkedIn	49	72	22	47	23	85	36	44
Instagram	13	47	21	58	28	38	67	55
Twitter	15	49	17	37	34	18	20	35
Messenger	22	6	7	23	29	6	23	7
WhatsApp	8	9	23	9	29	2	0	9
Pinterest	3	2	4	18	13	10	7	8
Snapchat	5	5	10	0	7	6	31	0
slack	18	6	4	7	2	4	7	0
SlideShare	18	10	0	0	4	2	4	4
∅ platforms	**2.6**	**4.1**	**1.9**	**3.9**	**2.9**	**3.6**	**3.6**	**3.1**

ICMF | Scion (2018) | countries in alphabetical order

At international level, executives have different views on the opportunities offered by contextual content. CH, DE, NO and BE are most optimistic.

New technologies like smart speakers (e.g. Amazon Echo, Google Home) are making content an even greater part of our daily lives. This is creating new content interaction opportunities.



ICMF | Scion (2018) | figures in % of respondents; top 2 boxes: applies (completely) | * note: small sample | countries in alphabetical order

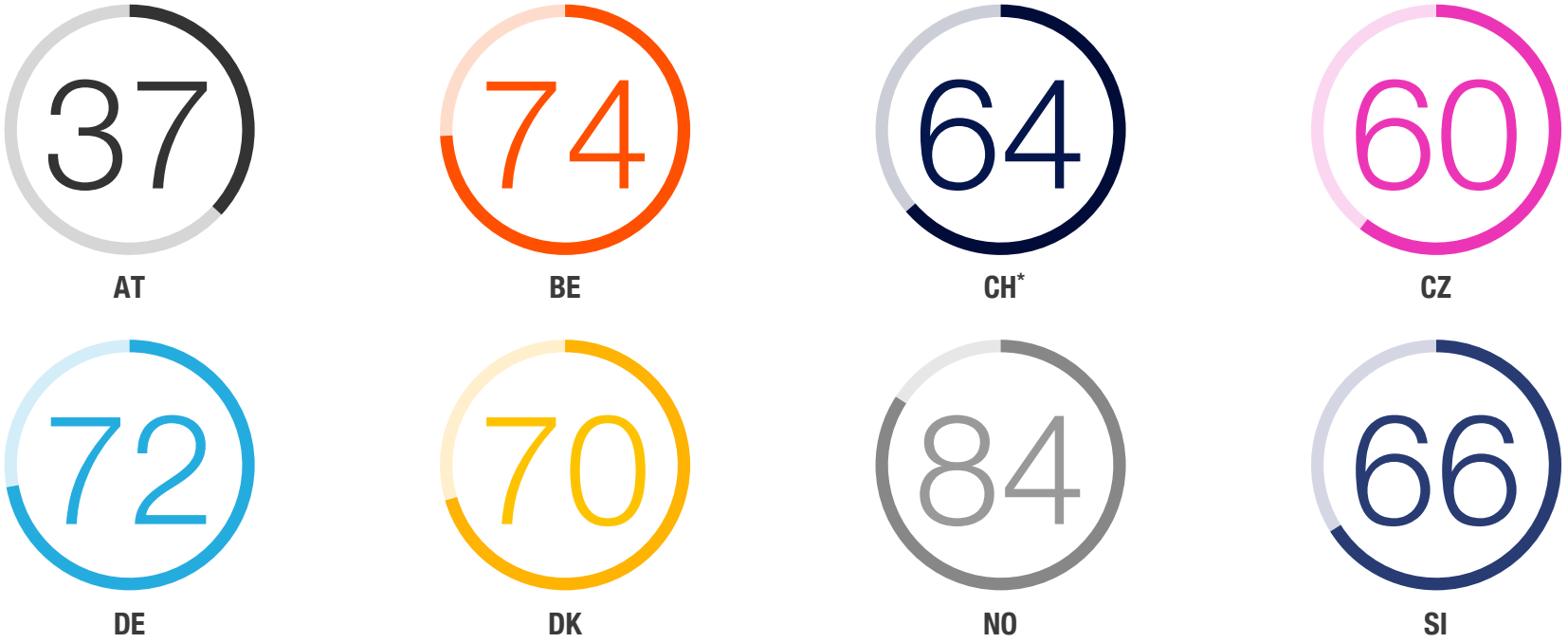
Considerable optimism regarding smart data and AI: the (clear) majority of content marketers are anticipating even more individualized content distribution, powerful chatbots, and more.

Smart data and artificial intelligence will take content marketing to a new level (e.g. content distribution based on predictive analytics, interactions via chatbots).

ICMF | Scion (2018) | figures in % of respondents; top 2 boxes: applies (completely) | * note: small sample | countries in alphabetical order

Interest in new channels is rather high in most countries. In particular, decision-makers in NO, BE, DE and DK are convinced that companies will try out new channels.

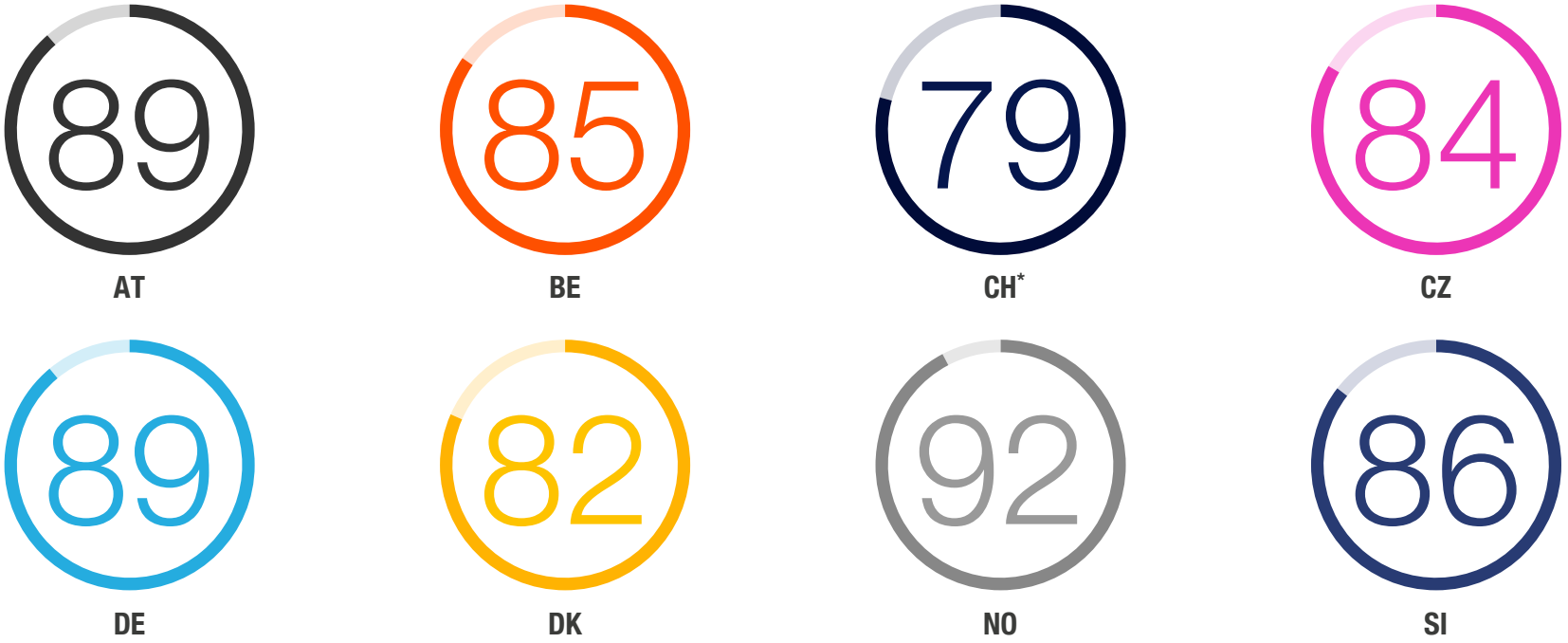
Companies will increasingly experiment with new, alternative content channels (e.g. smart speakers, VR, bots).



ICMF | Scion (2018) | figures in % of respondents; top 2 boxes: applies (completely) | * note: small sample | countries in alphabetical order

At international level, executives are convinced that content promotion is an absolute must.

Content promotion is key to successful content marketing.



ICMF | Scion (2018) | figures in % of respondents; top 2 boxes: applies (completely) | * note: small sample | countries in alphabetical order

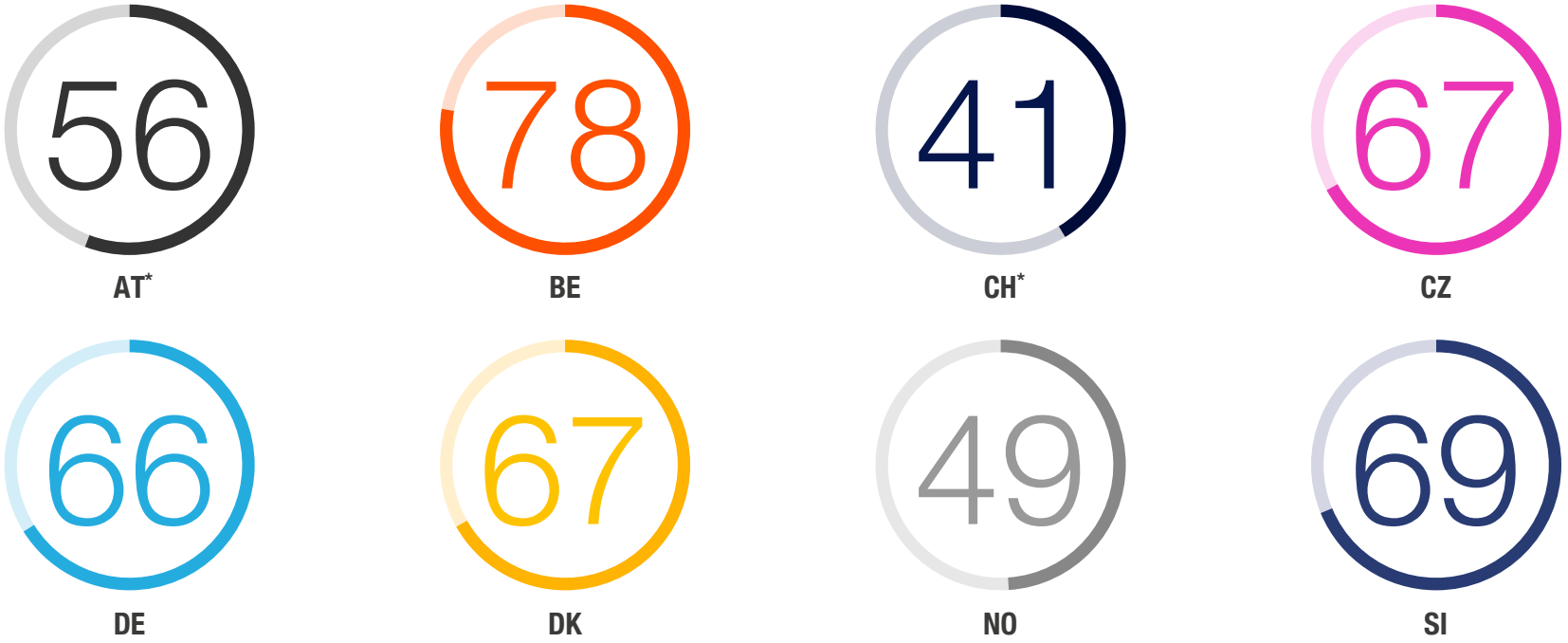
The importance of paid reach causes polarization at international level. In particular, executives in BE and the Scandinavian countries regard it as essential.

The organic reach of content is usually not sufficient – content marketing does not work without paid reach.

ICMF | Scion (2018) | figures in % of respondents; top 2 boxes: applies (completely) | * note: small sample | countries in alphabetical order

The future importance of influencers as a solution for distributing and amplifying content is assessed differently from country to country.

Influencers are not a temporary trend – in future they will play a key role in content marketing.



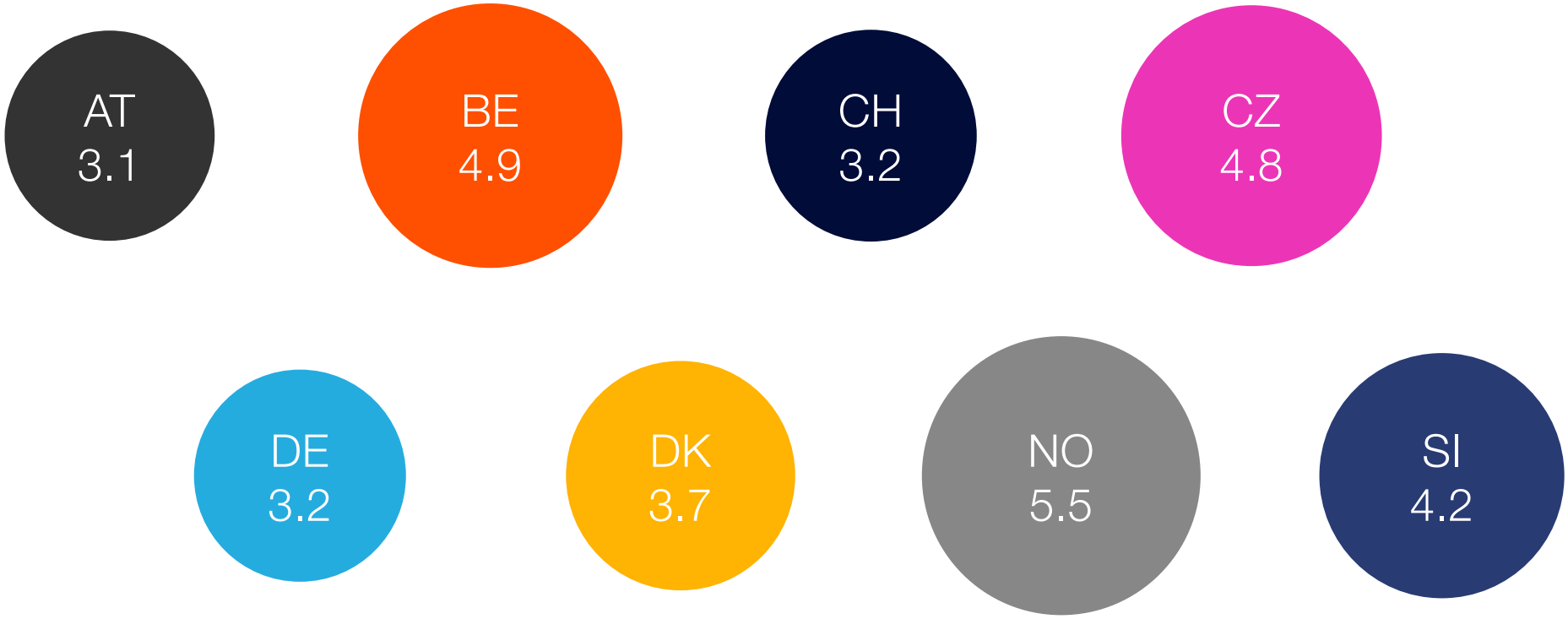
ICMF | Scion (2018) | figures in % of respondents; top 2 boxes: applies (completely) | * note: small sample | countries in alphabetical order

The choice between micro- and mega-influencers causes polarization between and within countries. This shows that decisions must be made context-specifically (e.g. niche products vs. mass markets).

Companies are better off investing their budgets with "micro-influencer" than "mega-influencers": although the former have fewer followers, these are more engaged.

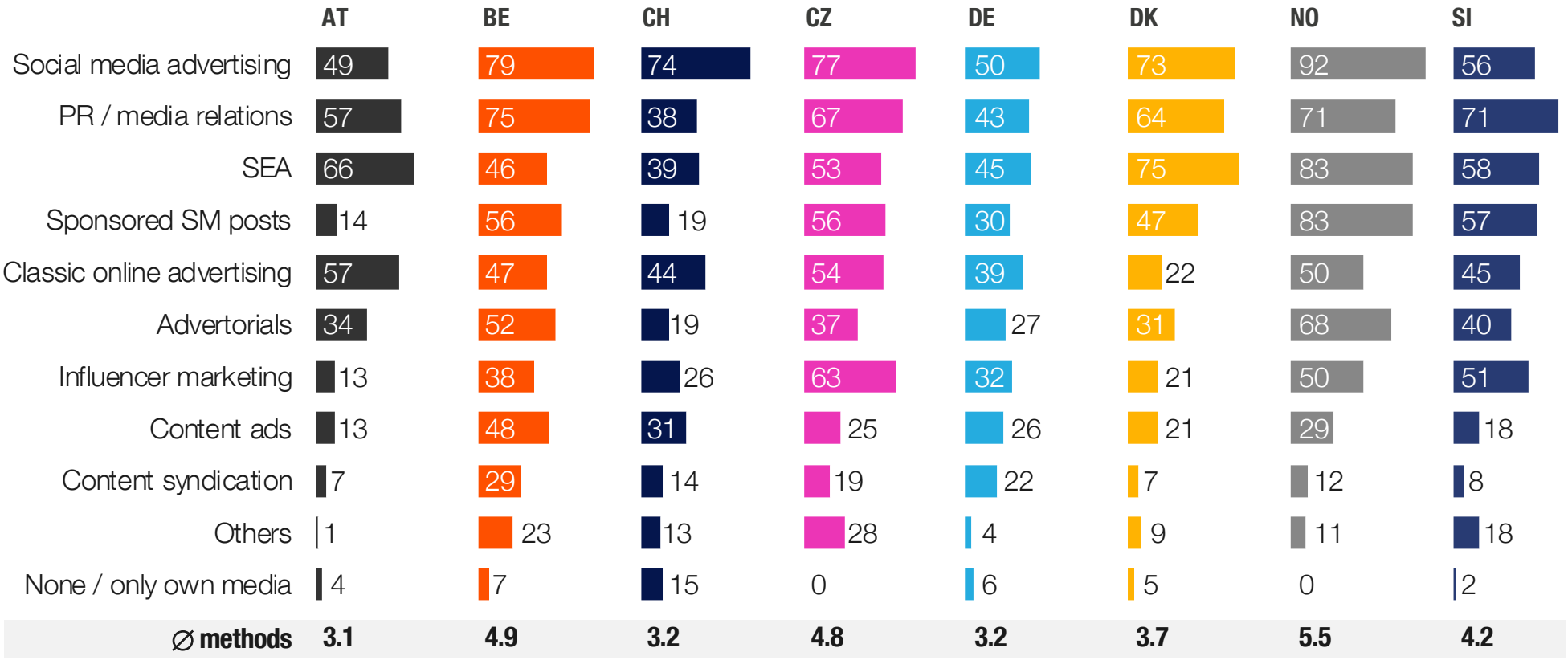
ICMF | Scion (2018) | figures in % of respondents; top 2 boxes: applies (completely) | * note: small sample | countries in alphabetical order

By international standards, content marketers in NO are leading the pack in using various content promotion methods, followed by BE and CZ.



ICMF | Scion (2018) | countries in alphabetical order

SMA, PR and SEA are the most widely used content promotion methods.



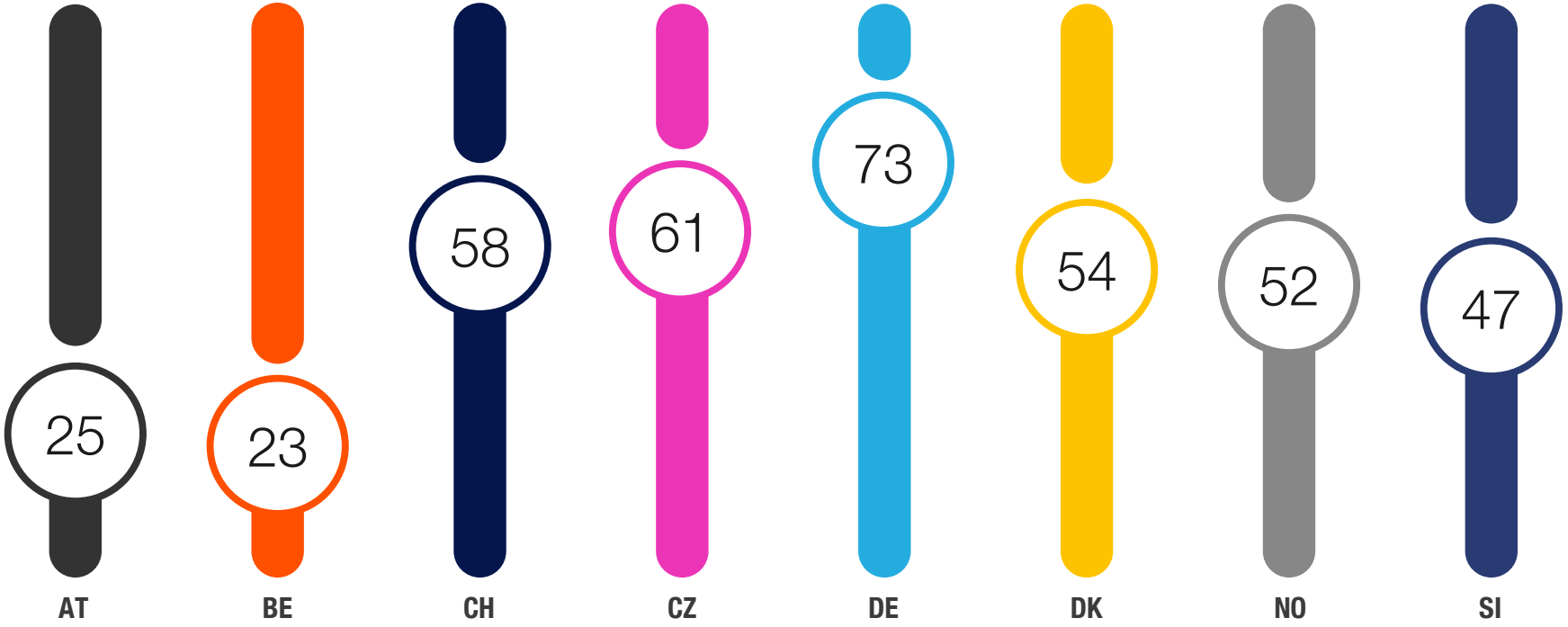
	AT	BE	CH	CZ	DE	DK	NO	SI
Social media advertising	49	79	74	77	50	73	92	56
PR / media relations	57	75	38	67	43	64	71	71
SEA	66	46	39	53	45	75	83	58
Sponsored SM posts	14	56	19	56	30	47	83	57
Classic online advertising	57	47	44	54	39	22	50	45
Advertorials	34	52	19	37	27	31	68	40
Influencer marketing	13	38	26	63	32	21	50	51
Content ads	13	48	31	25	26	21	29	18
Content syndication	7	29	14	19	22	7	12	8
Others	1	23	13	28	4	9	11	18
None / only own media	4	7	15	0	6	5	0	2
∅ methods	**3.1**	**4.9**	**3.2**	**4.8**	**3.2**	**3.7**	**5.5**	**4.2**

ICMF | Scion (2018) | countries in alphabetical order

Impact
measurement

At international level, impact measurement is not yet universally recognised as a must-have.

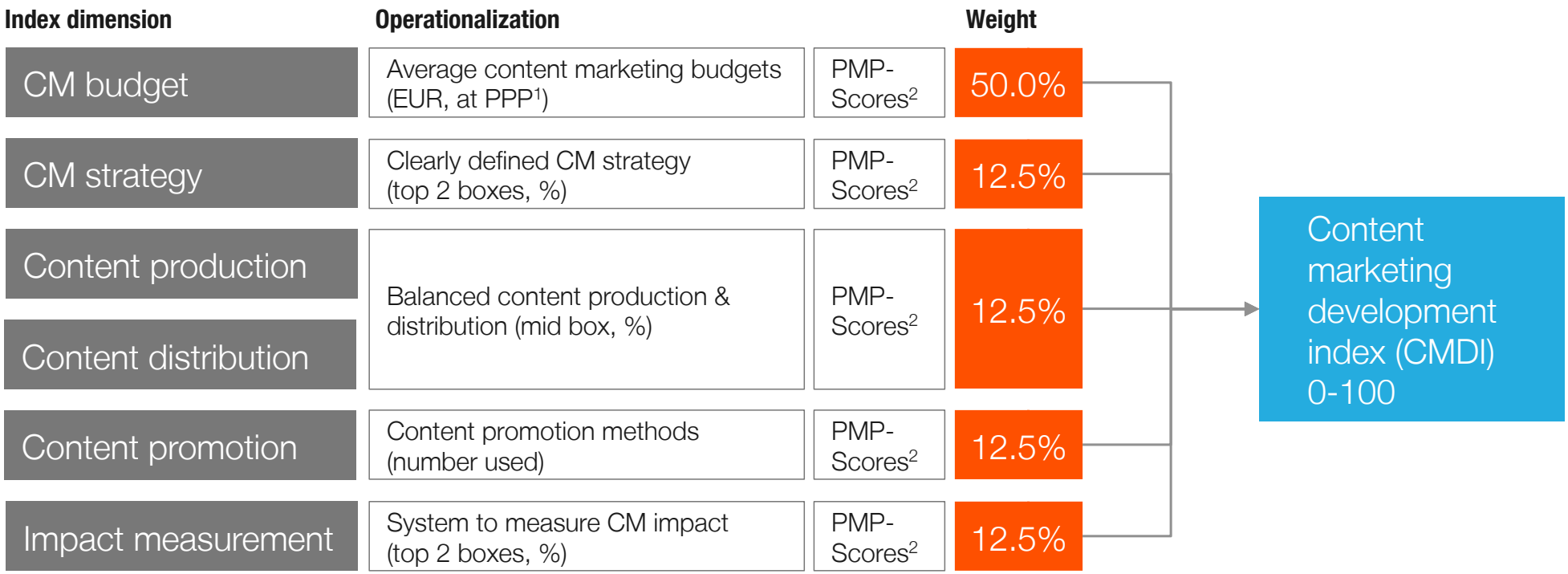
We have a system to measure the impact of our content marketing activities (e.g. clearly defined communications objectives, responsibilities, budgets).



ICMF | Scion (2018) | figures in % of respondents; top 2 boxes: applies (completely) | countries in alphabetical order

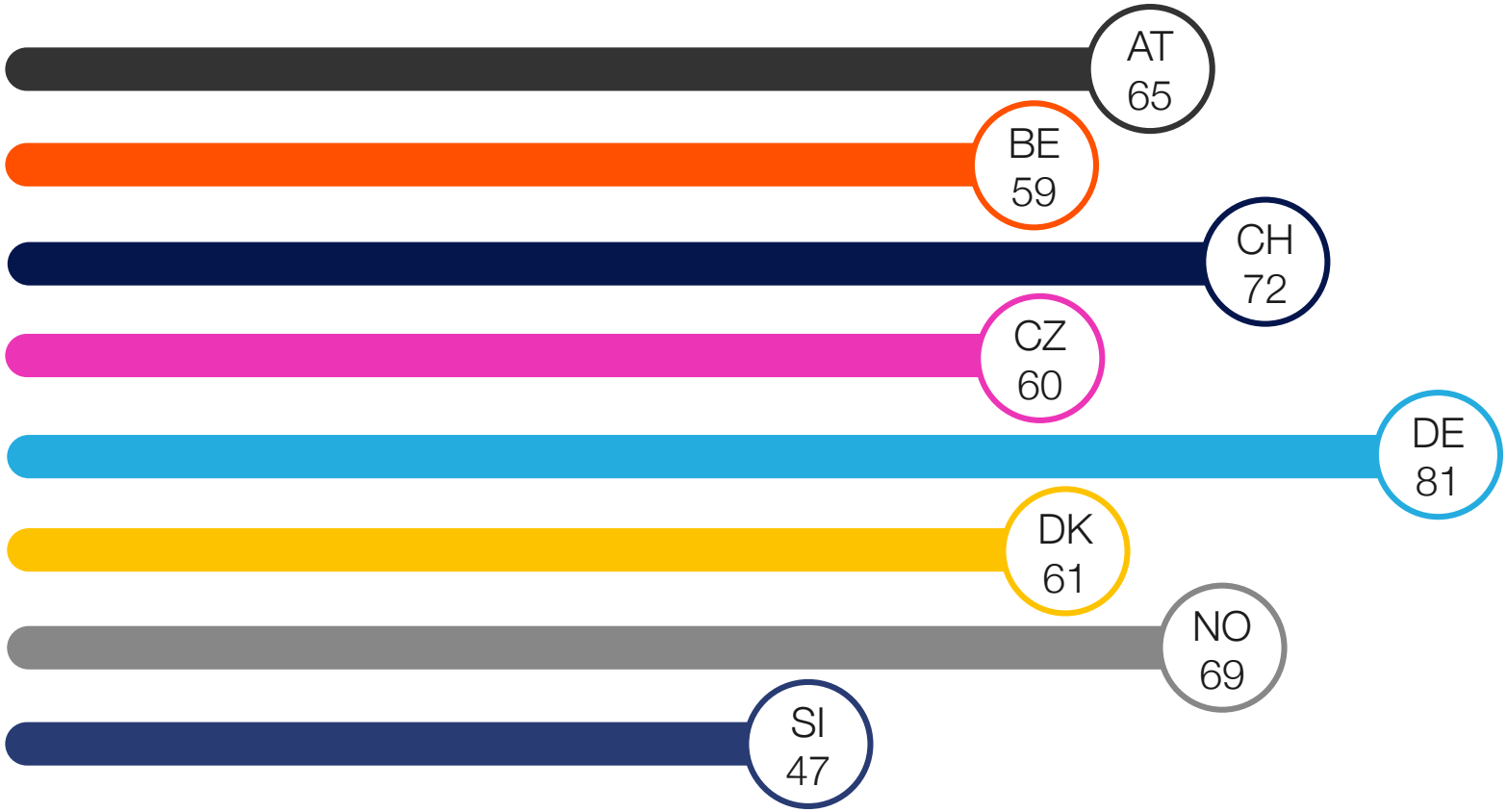
Content
marketing
development
index
(CMDI)

The overall level of content marketing development can be assessed using the CMDI.



ICMF | Scion (2018) | [1] budgets adjusted at purchasing power parity, PPP data from Eurostat (2018) | [2] percent of maximum possible score according to Cohen et al. (1999)

DE has currently the highest CMDI, followed by CH and NO.



ICMF | Scion (2018) | countries in alphabetical order

Editor of the study

International Content Marketing Forum
coordinated by
Content Marketing Forum e.V.
Dachauer Str. 21a
D-80335 Munich
+49 (0)89 34 07 79 77
www.content-marketing-forum.com

Contact:
Michael Hoeflich
michael.hoeflich@content-marketing-forum.com

Realization

Scion
Research Labs
Widenmayerstraße 31
D-80802 Munich

Contact:
Prof. Dr. Clemens Koob
clemens.koob@scionlabs.de
+49 (0)179 100 69 60