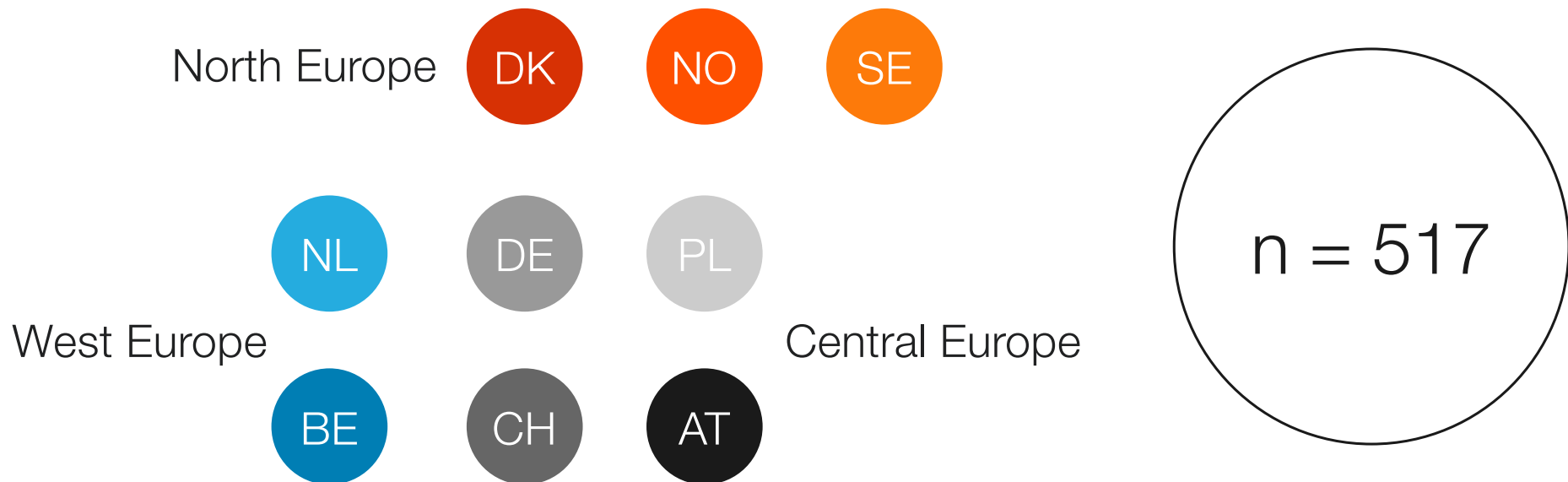


ICMF Survey 2021

Europe's biggest content marketing study
January 2021

The ICMF Survey 2021 surveyed more than 500 marketing executives (n = 517) in nine countries to identify the latest trends in content marketing at international level.



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

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

Content Marketing ...

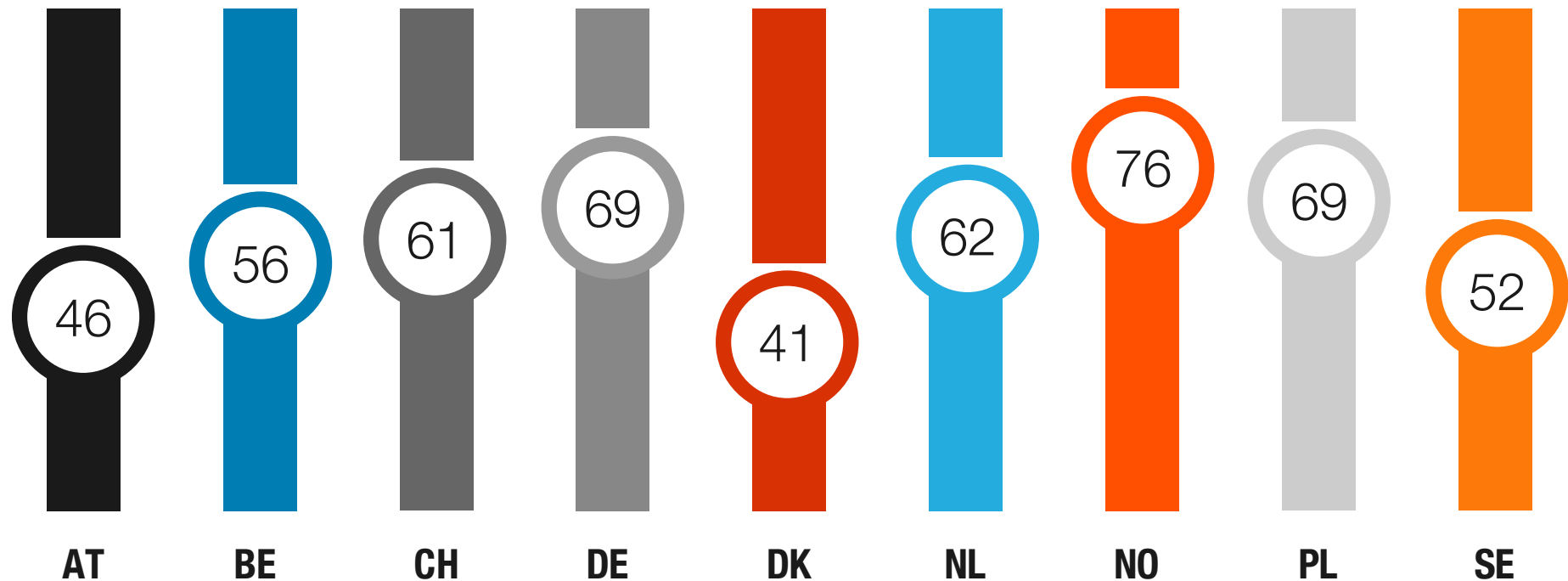
- | includes corporate, brand, product and employee communications
- | strives for significant measurable impact on all media channels used
- | includes continuous and temporary communications initiatives.



Content marketing strategy

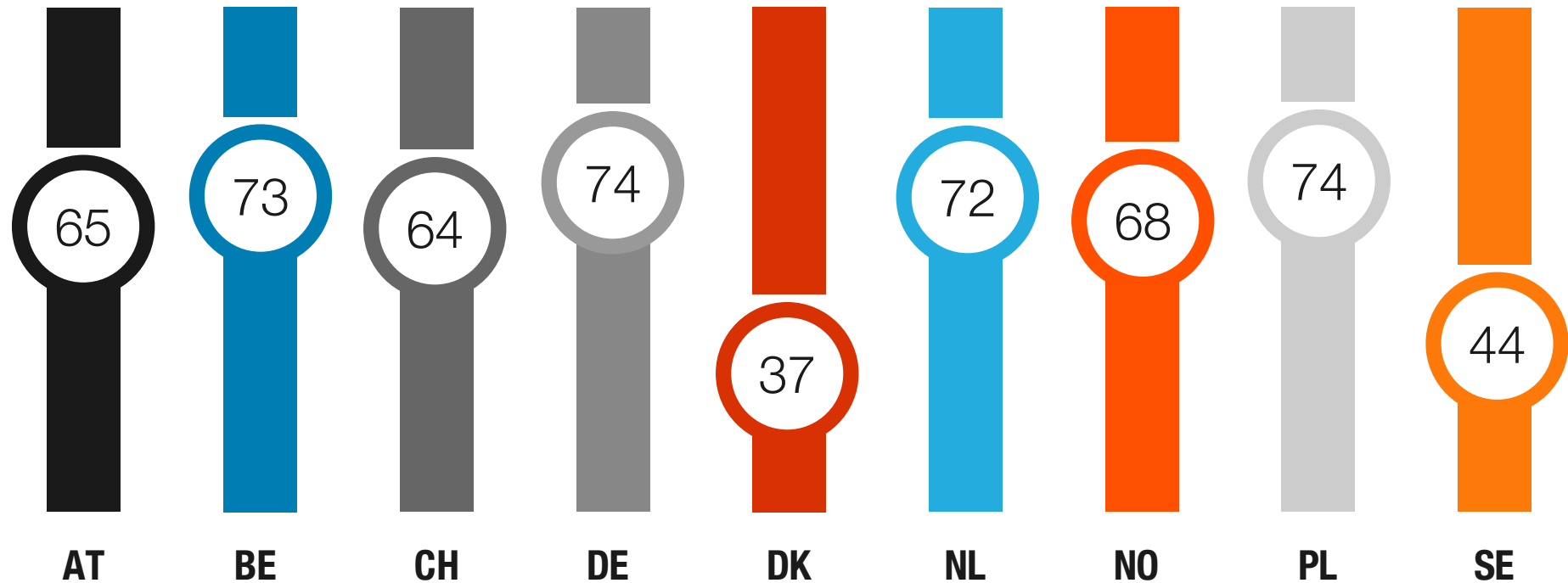
The degree of strategic maturity varies considerably: Depending on the country, 41-76 percent of the companies have a well-developed content marketing strategy.

We have a well-developed content marketing strategy.



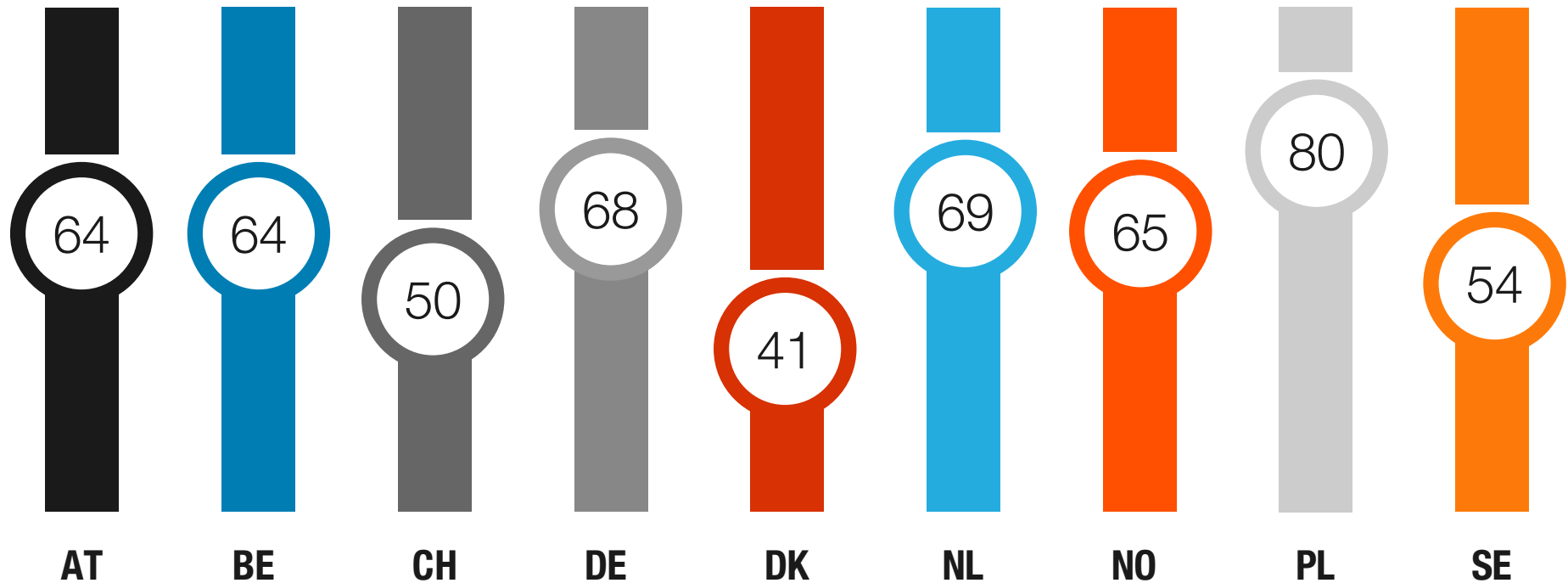
In terms of strategic clarity, most of the countries are comparatively close to each other, with 64-74 percent of the companies in these countries pursuing a clear CM strategy.

Our content marketing strategy is clear and understandable.



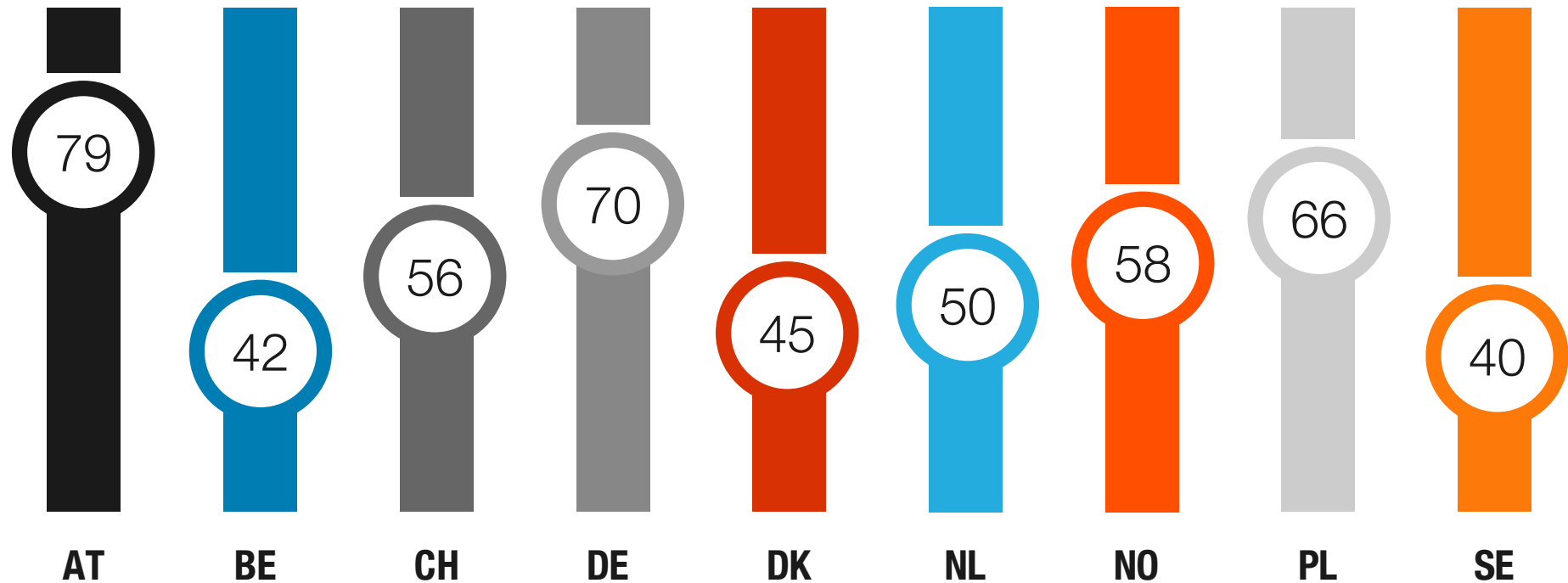
Polish companies are leading the field when it comes to long-term content marketing strategies, followed by companies from a group that includes countries NL, DE, NO, AT & BE.

Our content marketing strategy is long-run oriented.

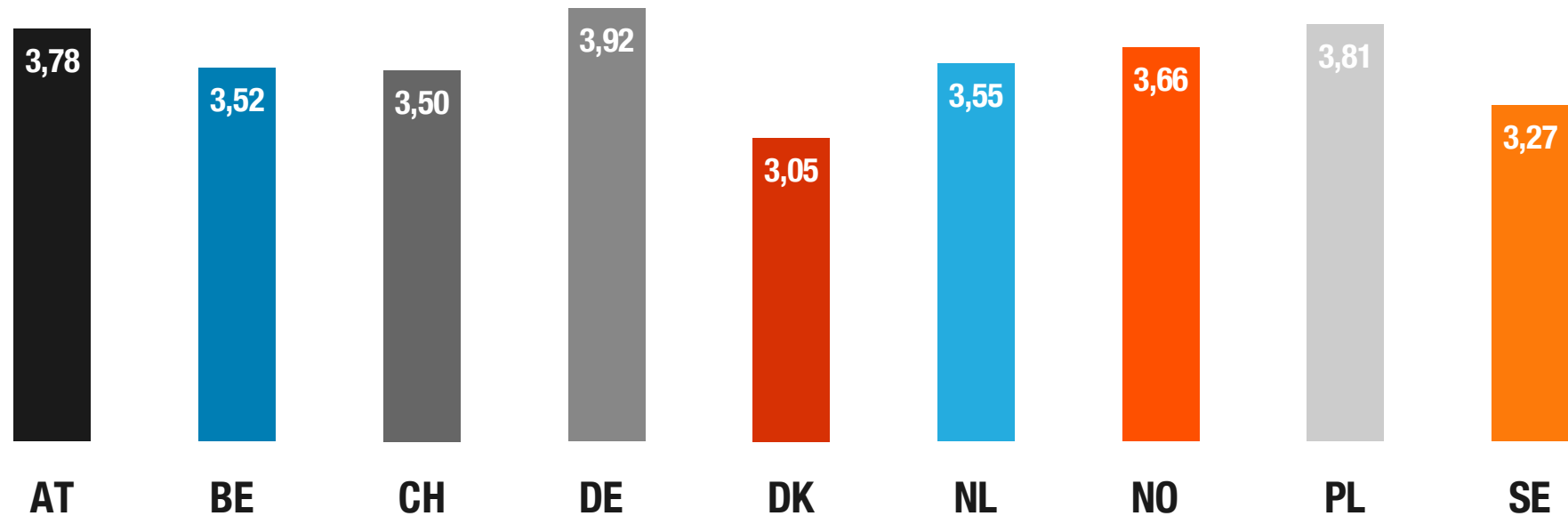


Regarding strategy commitment, there are considerable differences at international level, with 40-79 percent of companies stating that their CM strategies enjoy internal support.

Our content marketing strategy is strongly supported by managers and employees.



All in all, content marketers in Germany are leading the pack when it comes to strategy strength, followed by companies from Poland and Austria.



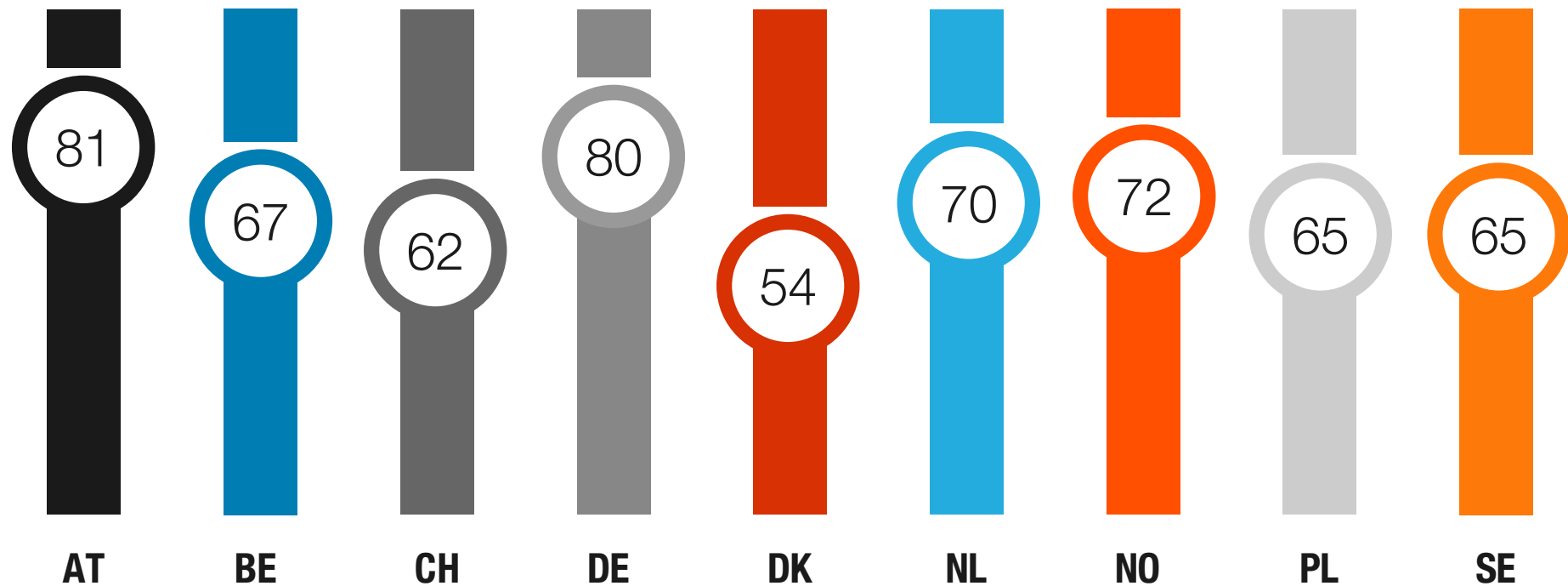
ICMF | Scion (2021) | mean rating of content marketing strategy items; 5 point Likert-type scale, 1 = doesn't apply at all, 5 = applies completely | countries in alphabetical order
* (leader score – laggard score)/scale range of 4 | ** (maximum possible value of 5 – leader score)/scale range of 4

A dark gray diagonal shape, resembling a large triangle or a parallelogram, is positioned on the left side of the image. It is oriented diagonally, with its hypotenuse running from the bottom-left towards the top-right. The rest of the image is white.

Content production

It is widely acknowledged, that optimizing customer-perceived content value is key.

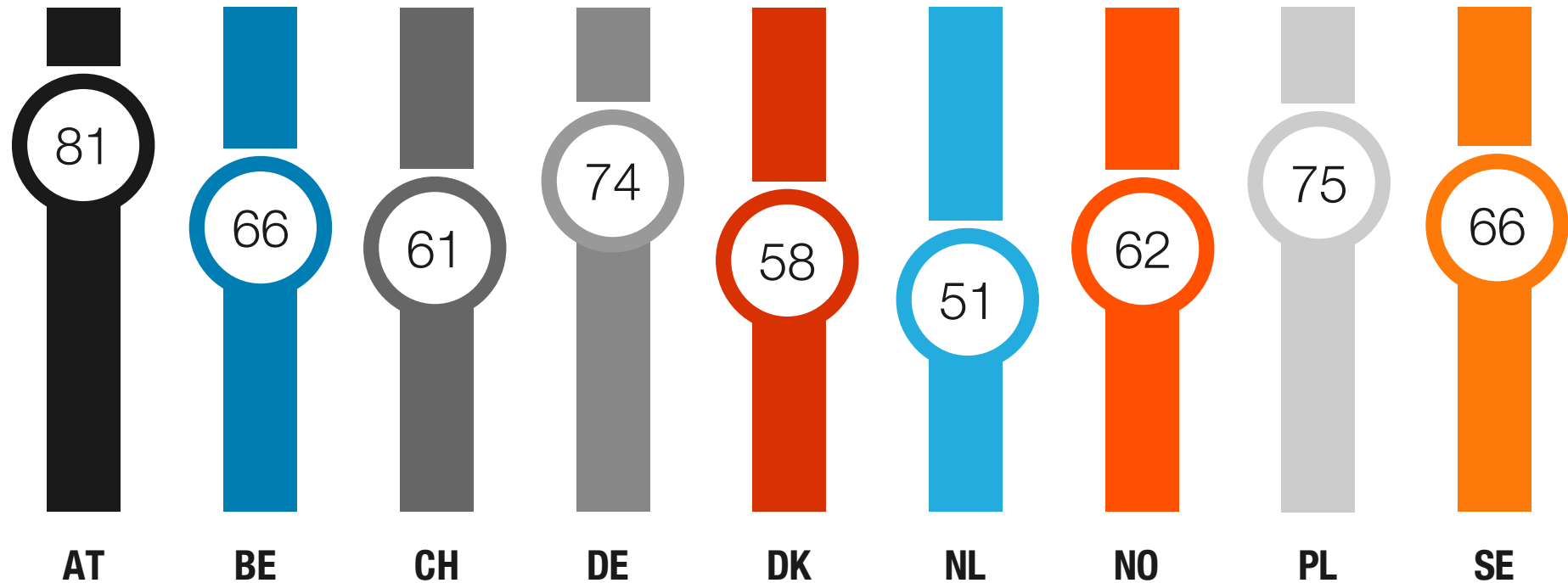
The content needs of our target groups have priority in content creation.



ICMF | Scion (2021) | figures in % of respondents; top 2 boxes: applies (completely) | countries in alphabetical order

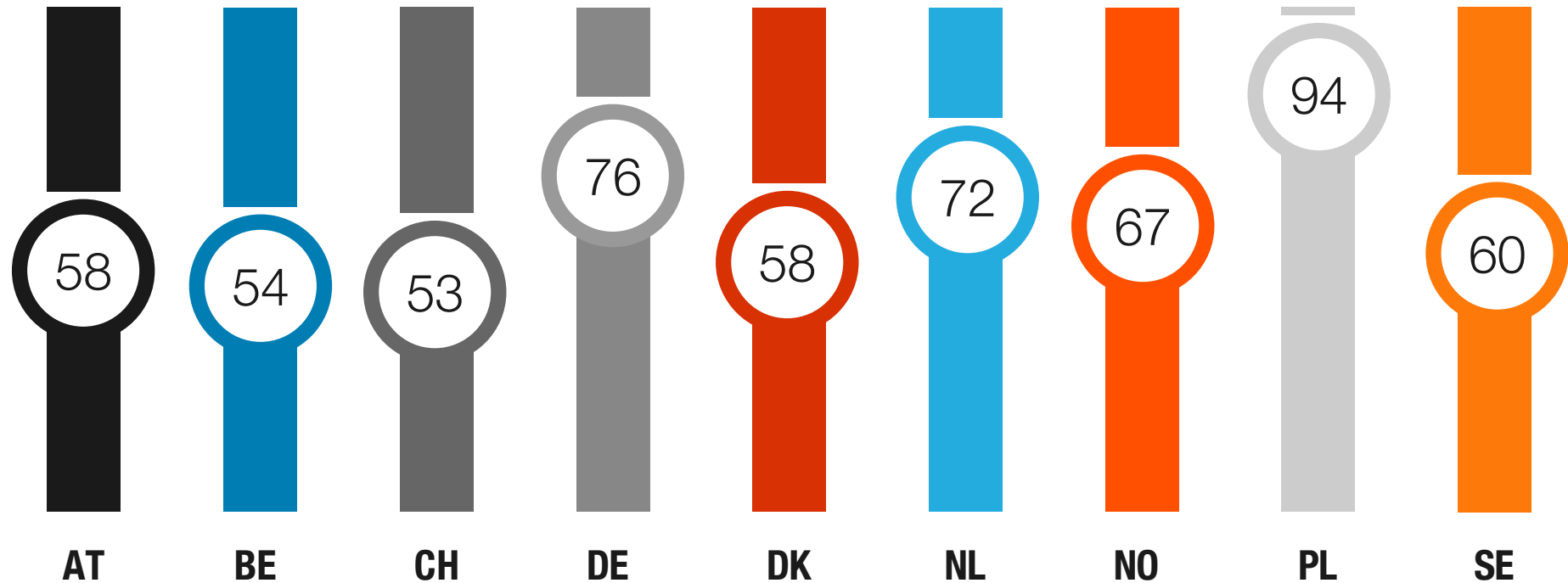
At international level, the majority of companies adhere to normative quality criteria. Nonetheless, there are clear differences (51-81%) between countries in this regard.

We base our content production on journalistic principles (e.g. comprehensibility, timeliness, accuracy).

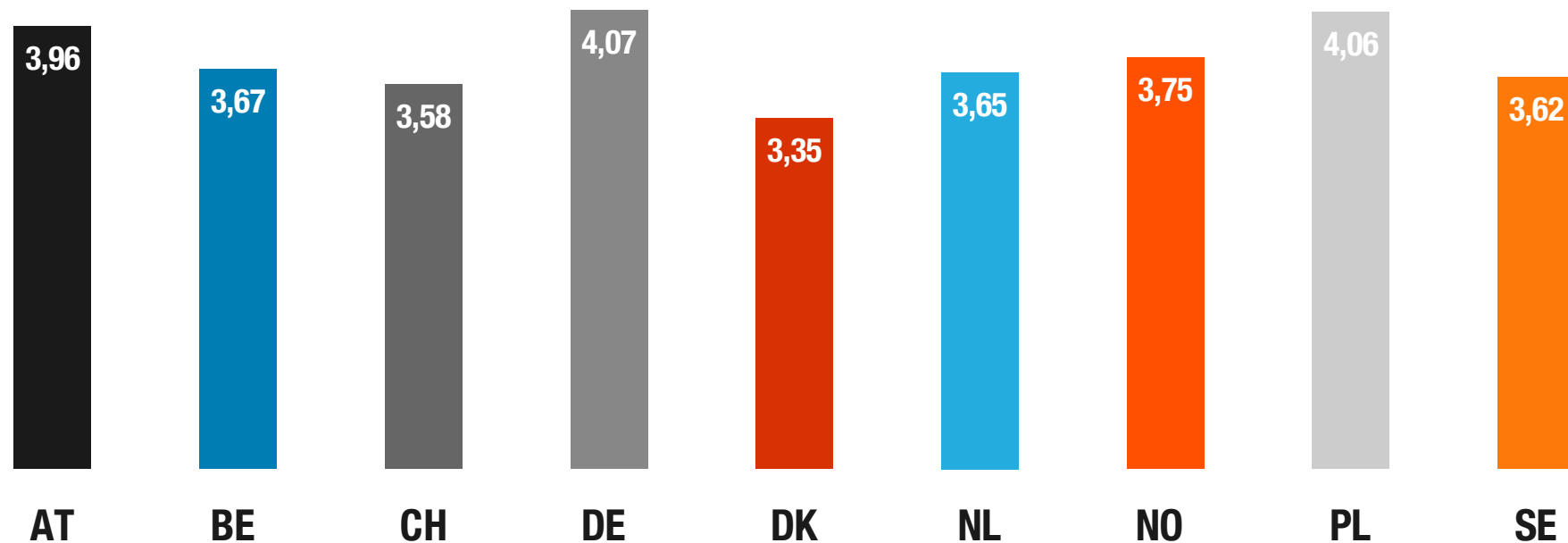


Most content marketers nowadays plan and create their content offerings systematically. In many countries, however, there is still room for improvement in this regard.

We plan and create content systematically.



Taken together, content marketers in Germany, Poland and Austria are leaders in considering factors that are essential for good content production.

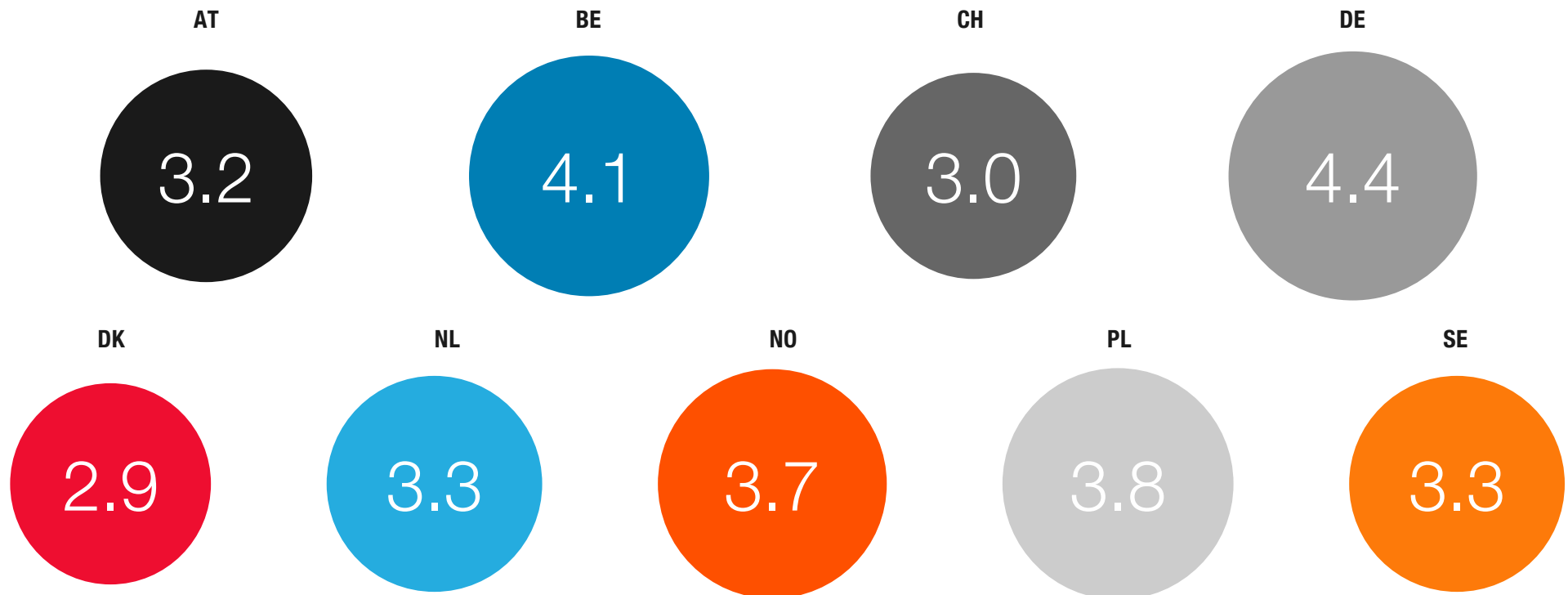


ICMF | Scion (2021) | mean rating of content marketing strategy items; 5 point Likert-type scale, 1 = doesn't apply at all, 5 = applies completely | countries in alphabetical order
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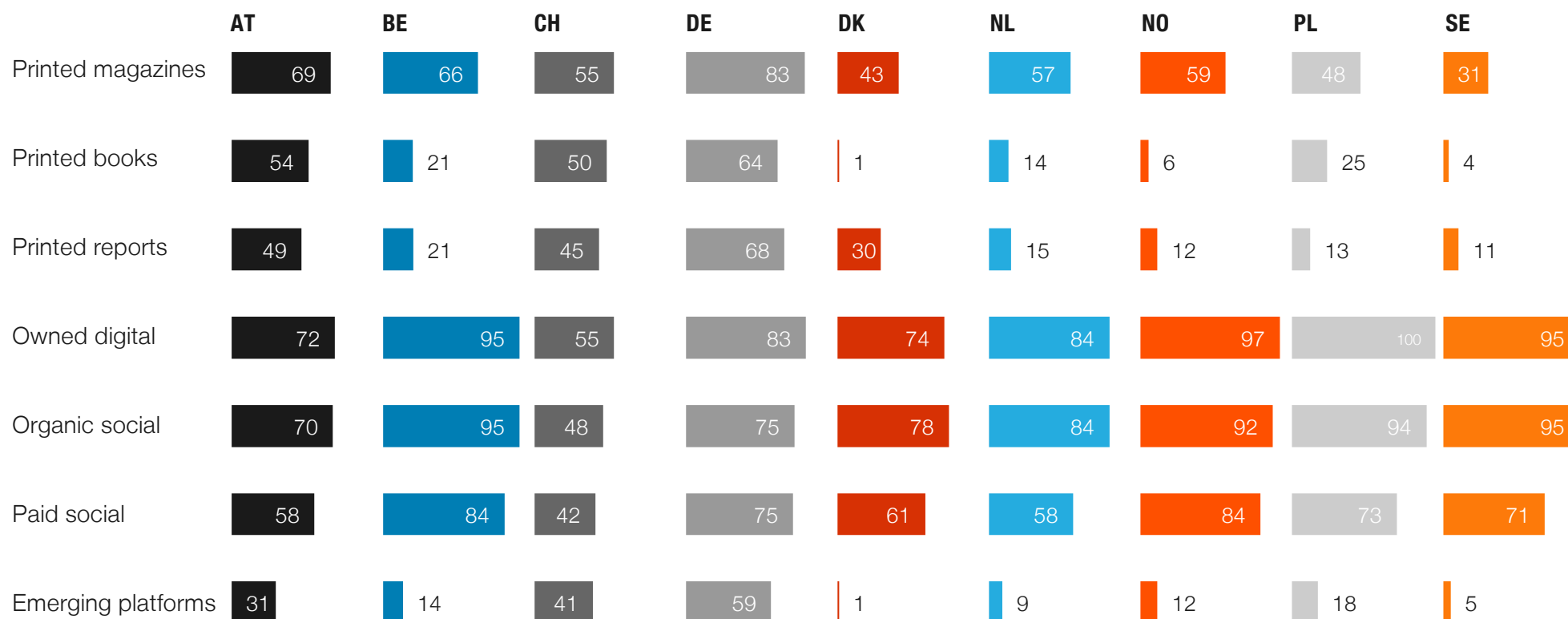


Content distribution

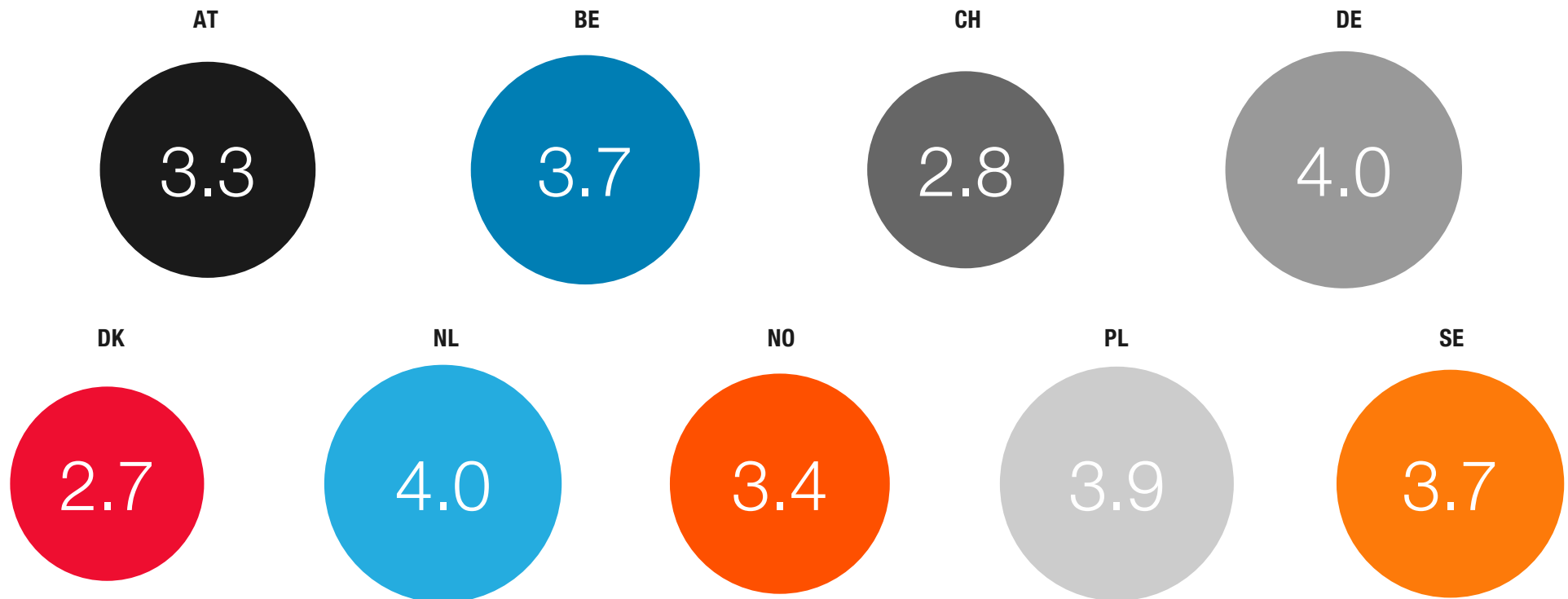
Companies in DE and BE are leading the field in using various media platforms ahead of PL and NO (however, one should keep in mind: more is not necessarily better).



A closer look reveals considerable differences. Print and new platforms have more weight in DE, AT & CH. Owned digital & organic social are more frequently used in BE, NO, PL & SE.



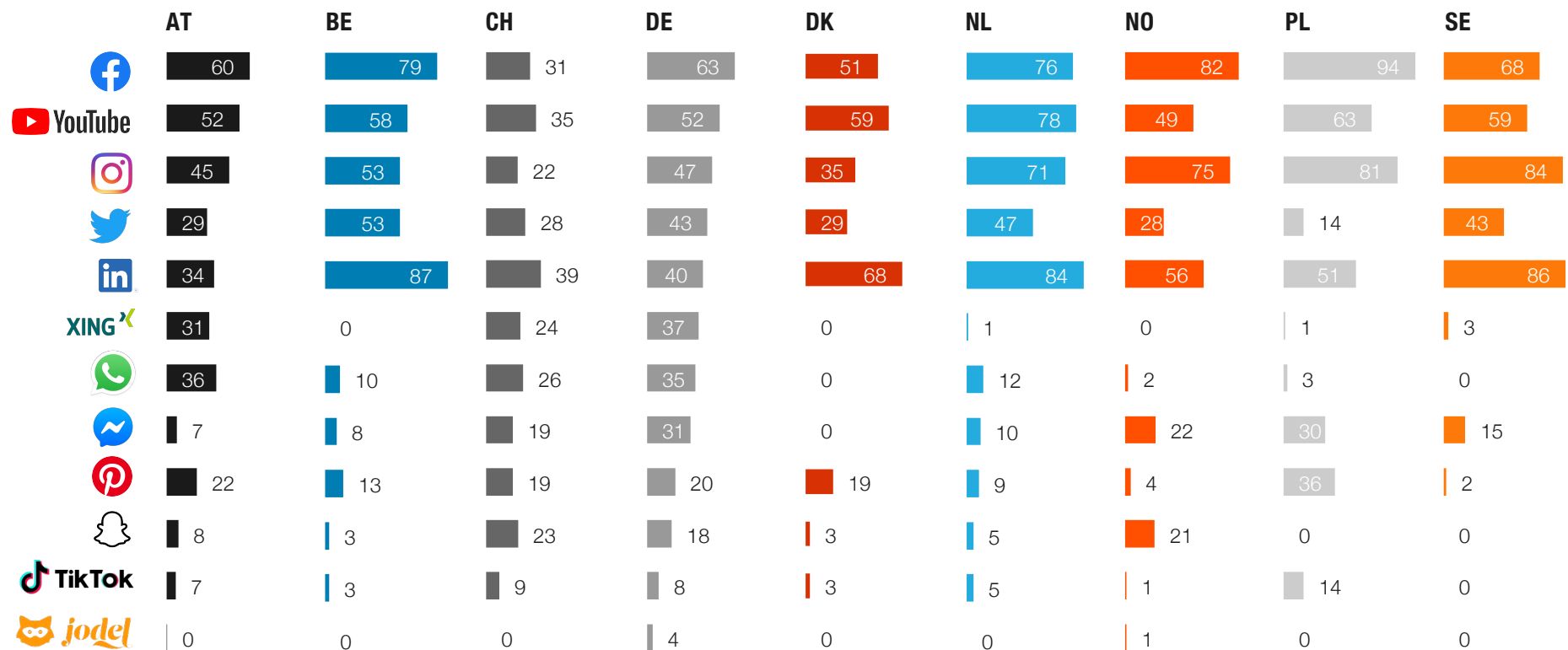
By international standards, content marketers in DE, NL and PL are leading the pack in using social media platforms for content marketing, followed by BE and SE.



Content distribution: social media platforms used for content marketing purposes

19

A closer look reveals differences in the usage ratios. Facebook tops the charts in four of the nine countries (and is always among the top 3), LinkedIn ranks first in the other five countries. YouTube and Instagram are also repeatedly among the top 3.



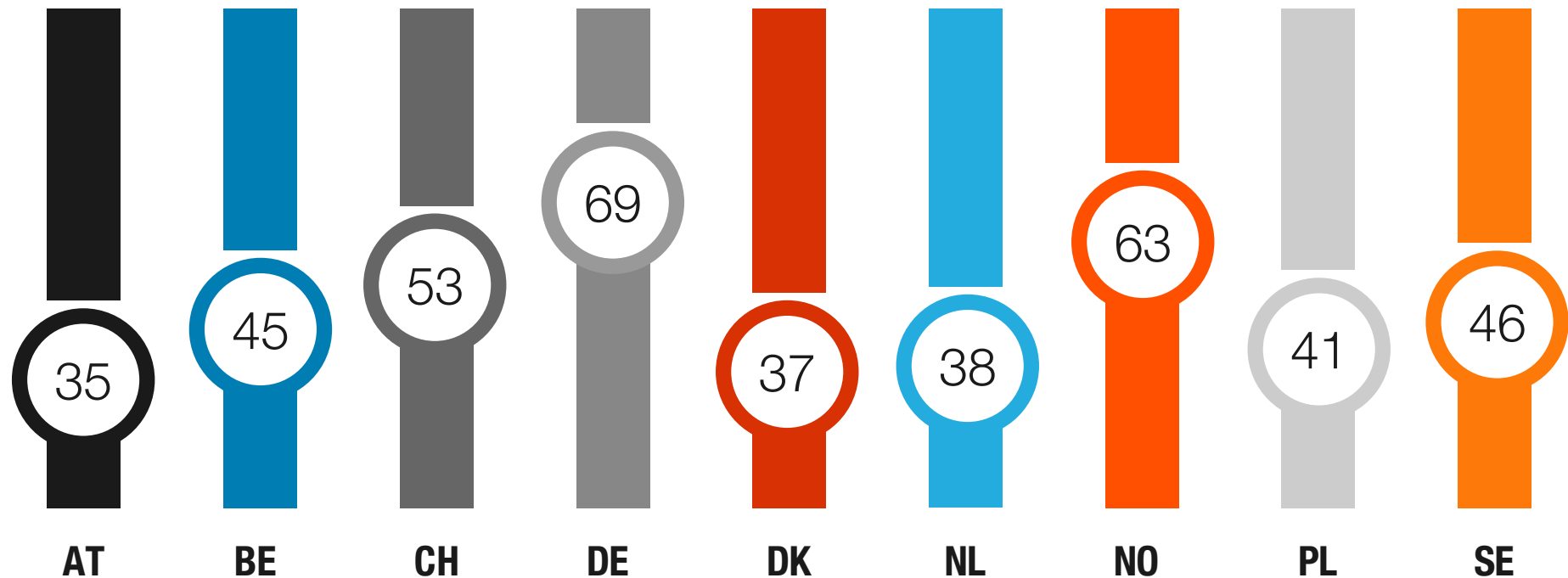
ICMF | Scion (2021) | figures in % of companies | countries in alphabetical order



Performance measurement

At international level, establishing a system for content marketing performance measurement is not yet universally recognized as a must-have.

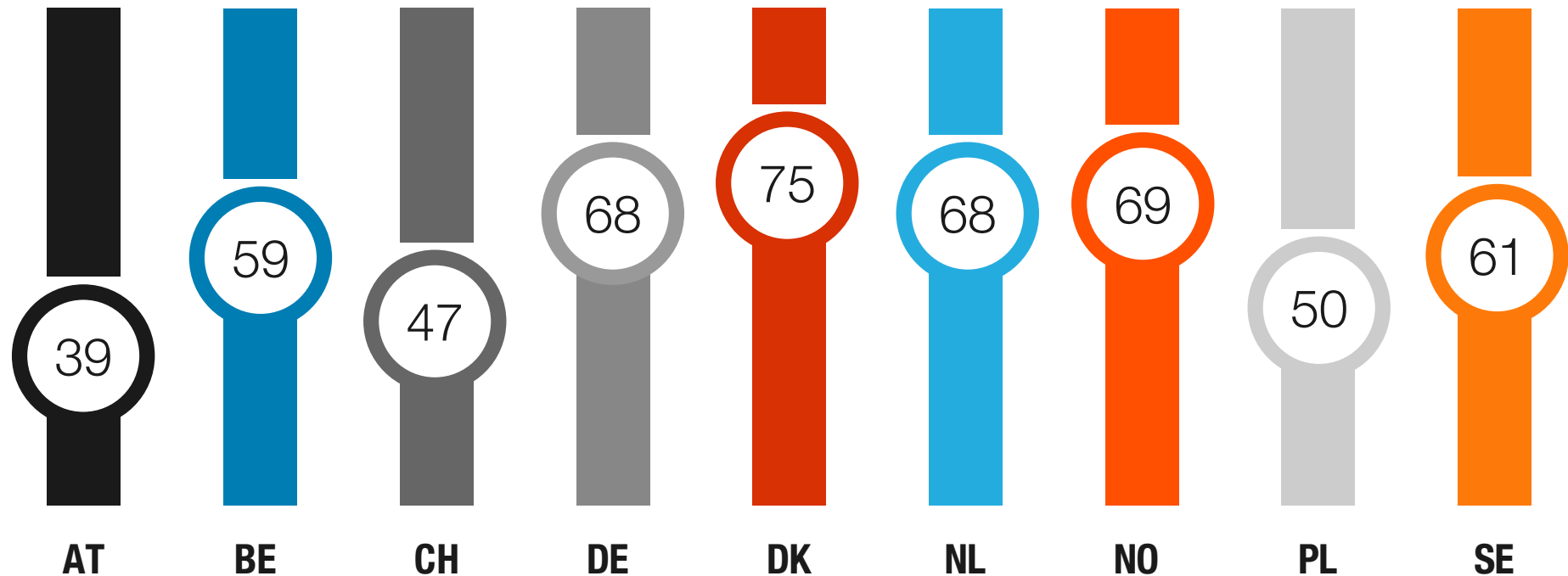
We have a system to measure the impact of our content marketing activities (e.g. clear communications objectives, responsibilities, budgets).



ICMF | Scion (2021) | figures in % of respondents; top 2 boxes: applies (completely) | countries in alphabetical order

The frequency of digital media performance checks varies significantly between countries, with 25-61 percent of companies not measuring frequently.

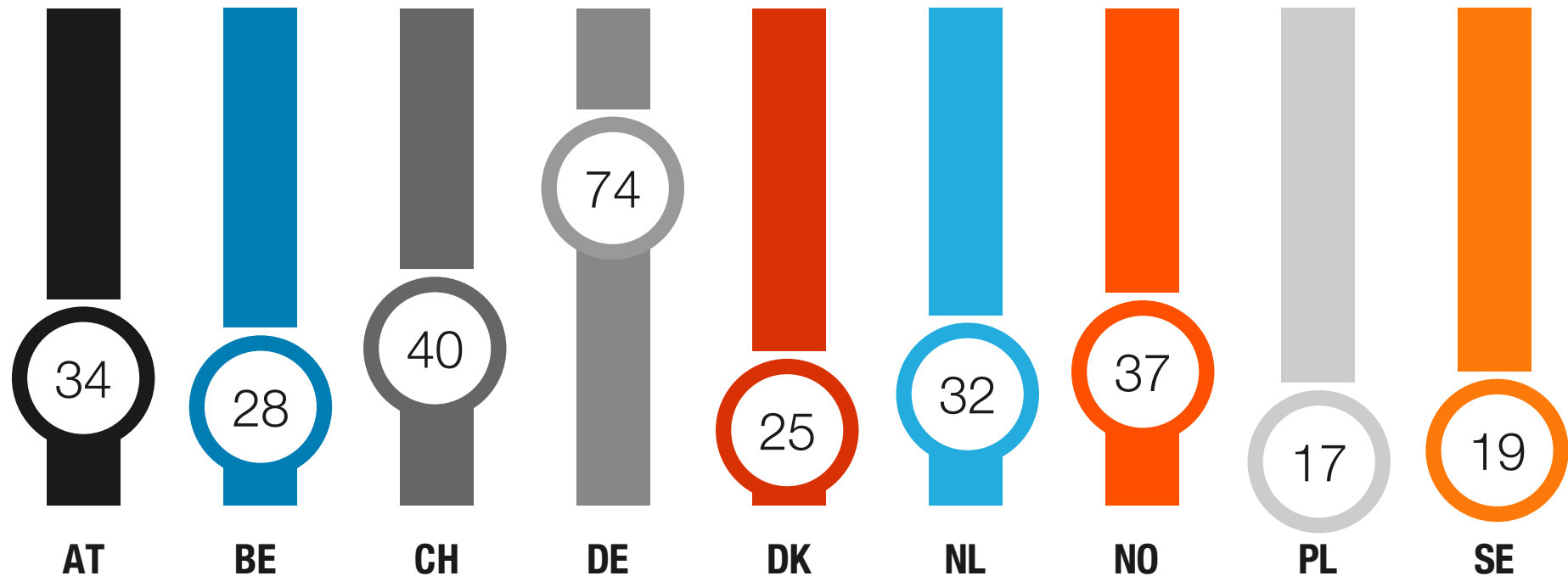
We frequently measure the performance of the **digital media** employed in our content marketing initiatives.



ICMF | Scion (2021) | figures in % of respondents using digital media; top 2 boxes: applies (completely) | countries in alphabetical order

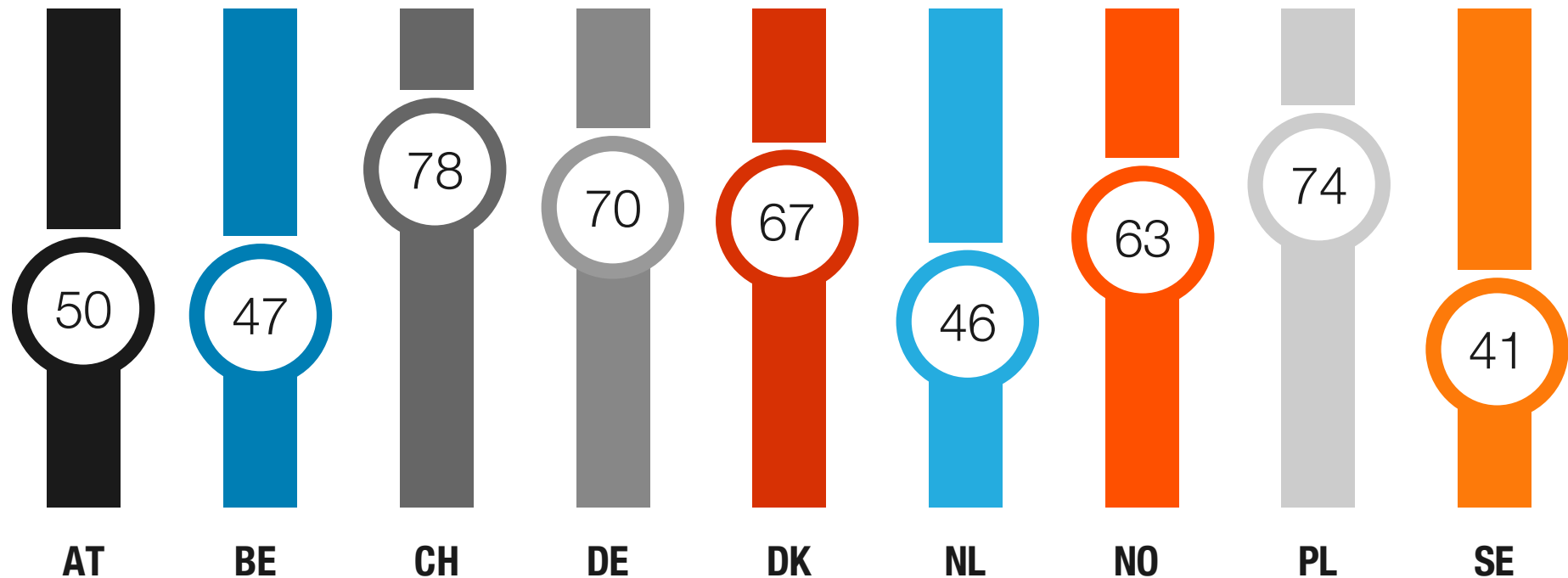
Content marketers using print media usually measure the impact of those media only occasionally, with companies in Germany being the positive exception.

We frequently measure the performance of the **print media** employed in our content marketing initiatives.

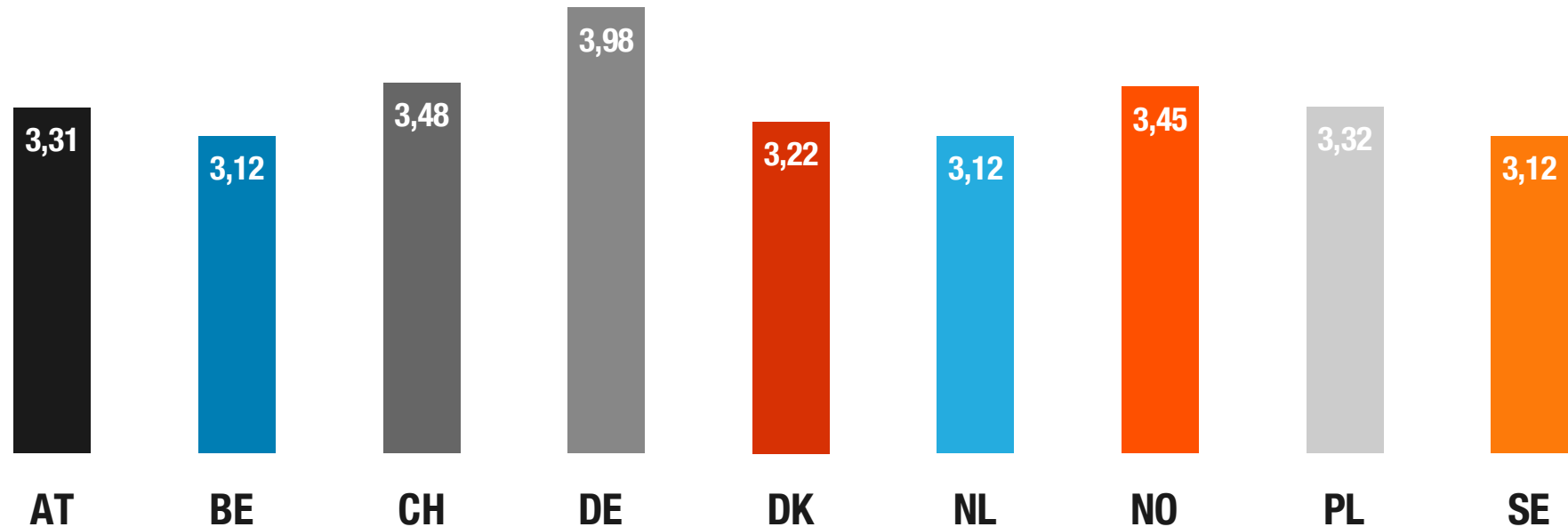


Though many companies do not have a comprehensive CMPM system and do not closely check the effectiveness of the media used, the percentage of companies that state that they optimize their content based on data is relatively high.

We use performance measurement data for continuously improving our content offerings.



**Content marketing performance measurement is most pronounced in Germany.
The data show that there is still a need for international action on this topic.**



ICMF | Scion (2021) | mean rating of content marketing strategy items; 5 point Likert-type scale, 1 = doesn't apply at all, 5 = applies completely | countries in alphabetical order
* (leader score – laggard score)/scale range of 4 | ** (maximum possible value of 5 – leader score)/scale range of 4



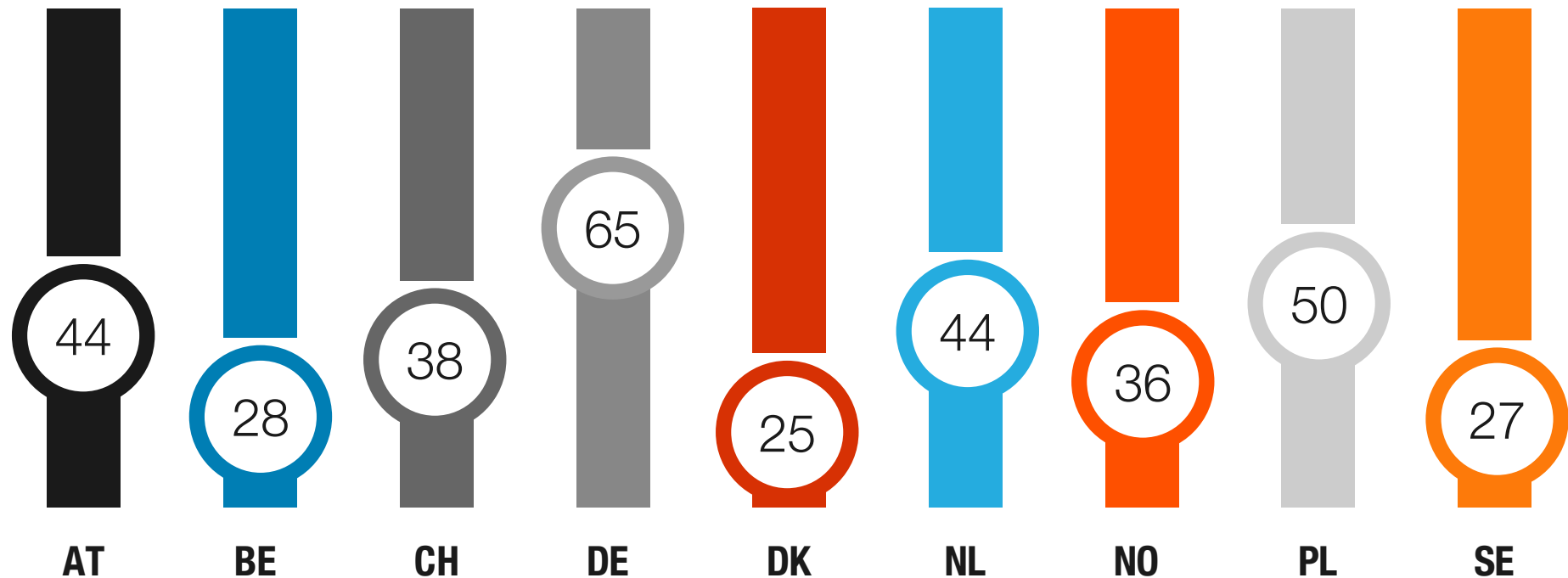
Organization

Structural specialization: dedicated content marketing unit

27

In almost all countries in the study, only a minority of companies rely on a specialized content marketing unit – which generally offers the potential to enhance the CM knowledge base and to quickly respond to communication needs.

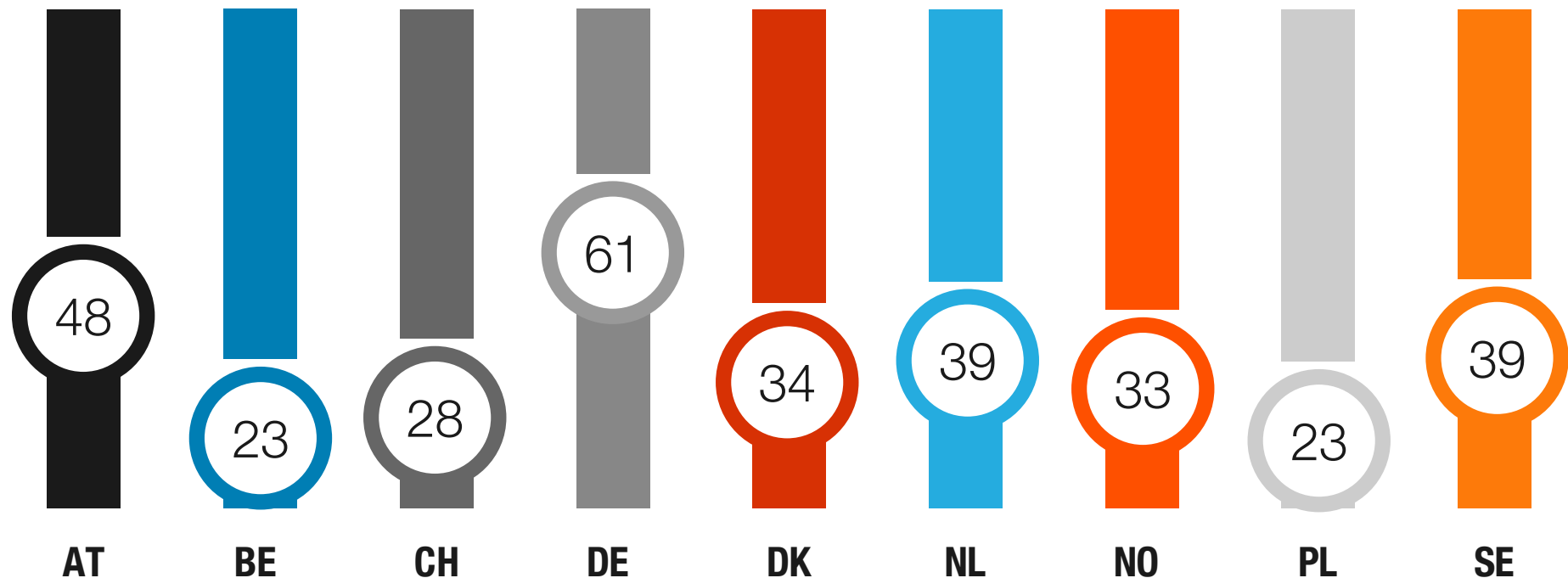
Our organization has a dedicated content marketing unit (e.g. brand newsroom, content factory).



ICMF | Scion (2021) | figures in % of respondents; top 2 boxes: applies (completely) | countries in alphabetical order

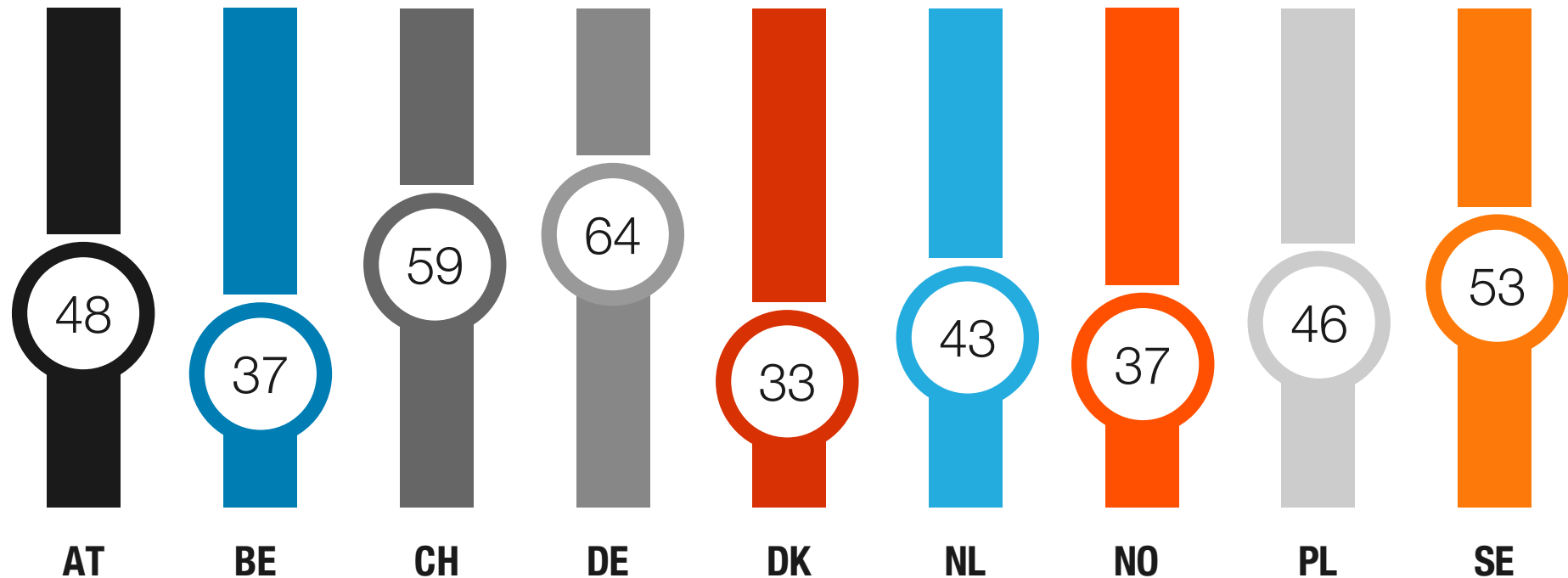
Specialization at employee level in terms of a high share of task- and skill-specialized content marketing experts is still relatively little advanced internationally.

Our organization has a large number of 'specialist' employees who direct their efforts to content marketing activities.



In many companies there are (still) structural and processual deficits that stand in the way of even more effective and efficient content marketing.

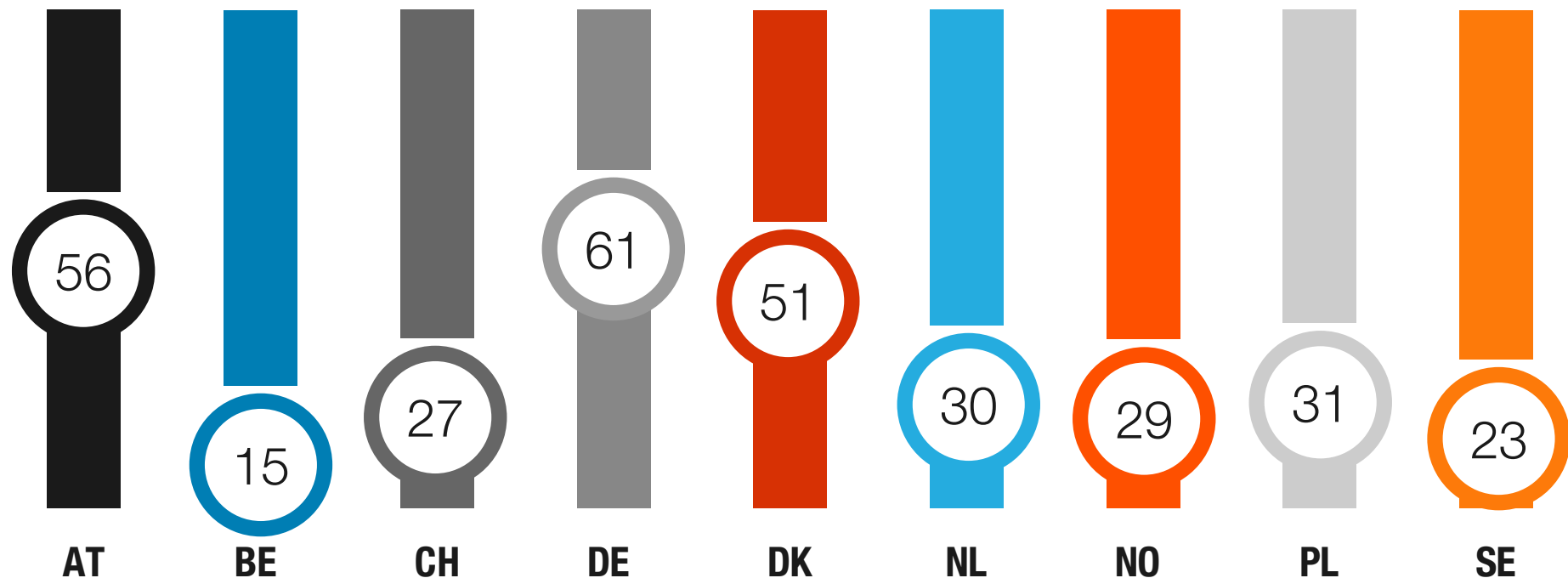
We have organizational structures and processes that support the smooth execution of content marketing activities.



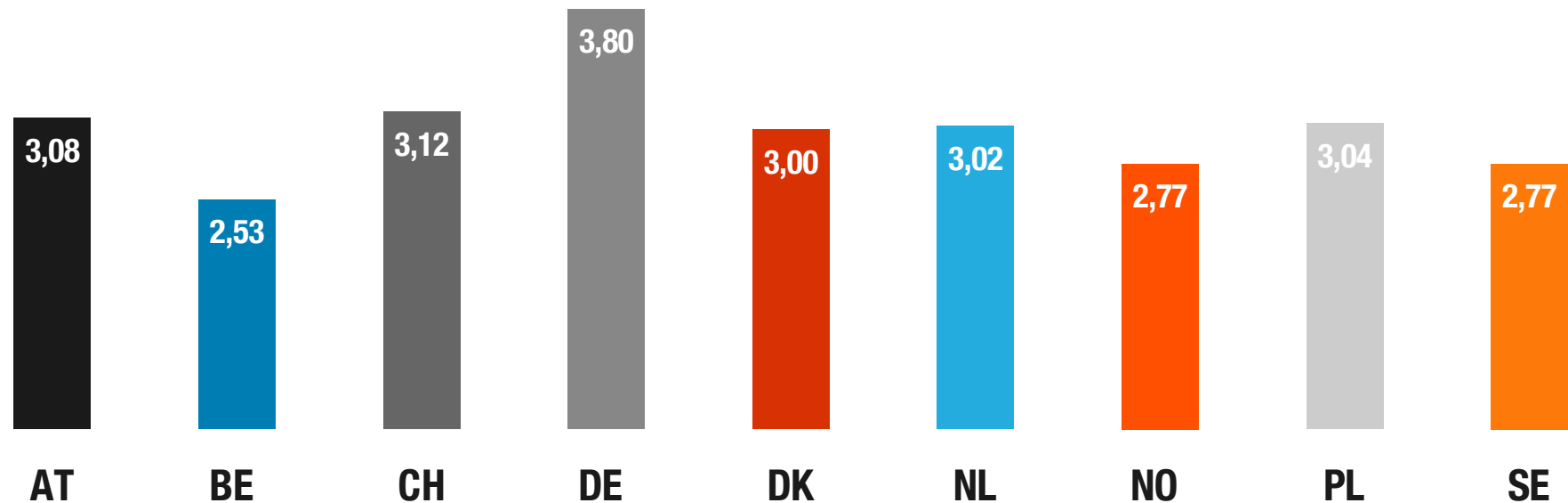
ICMF | Scion (2021) | figures in % of respondents; top 2 boxes: applies (completely) | countries in alphabetical order

With regard to tool use, the picture is polarized internationally: Only in Germany, Austria and Denmark do a (narrow) majority of companies use such tools extensively.

Our organization makes extensive use of IT-systems that support content marketing activities (content marketing platforms).



Overall, the study results indicate that there is a clear need to catch up internationally when it comes to content marketing organization.





Content marketing effectiveness

Widespread unanimity among executives: content marketing leads to high target group engagement, has a positive effect on brand trust and attitudes, and increases brand value.

		AT	BE	CH	DE	DK	NL	NO	PL	SE
interaction	Cognitive engagement	75	86	58	83	62	85	83	82	76
	Affective engagement	83	80	69	80	58	80	78	91	68
	Conative engagement	70	69	65	72	80	68	70	82	58
attitudes	Brand trust / credibility	66	80	67	74	84	74	74	76	59
	Brand trust / benevolence	67	91	45	68	76	69	65	89	67
	Favorable brand attitude	84	83	55	78	76	74	85	92	77
value	Increased brand value	73	80	41	73	80	87	83	95	77

ICMF | Scion (2021) | figures in % of respondents; top 2 boxes: applies (completely) | countries in alphabetical order

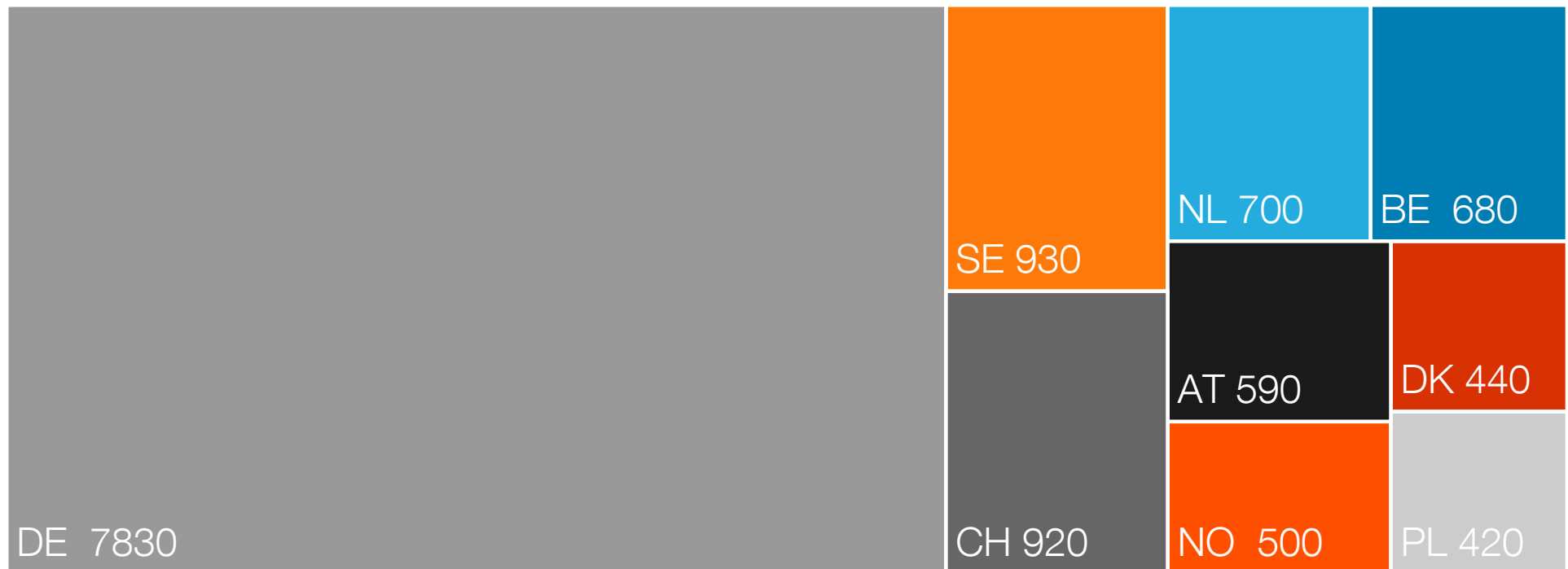


Content marketing investments

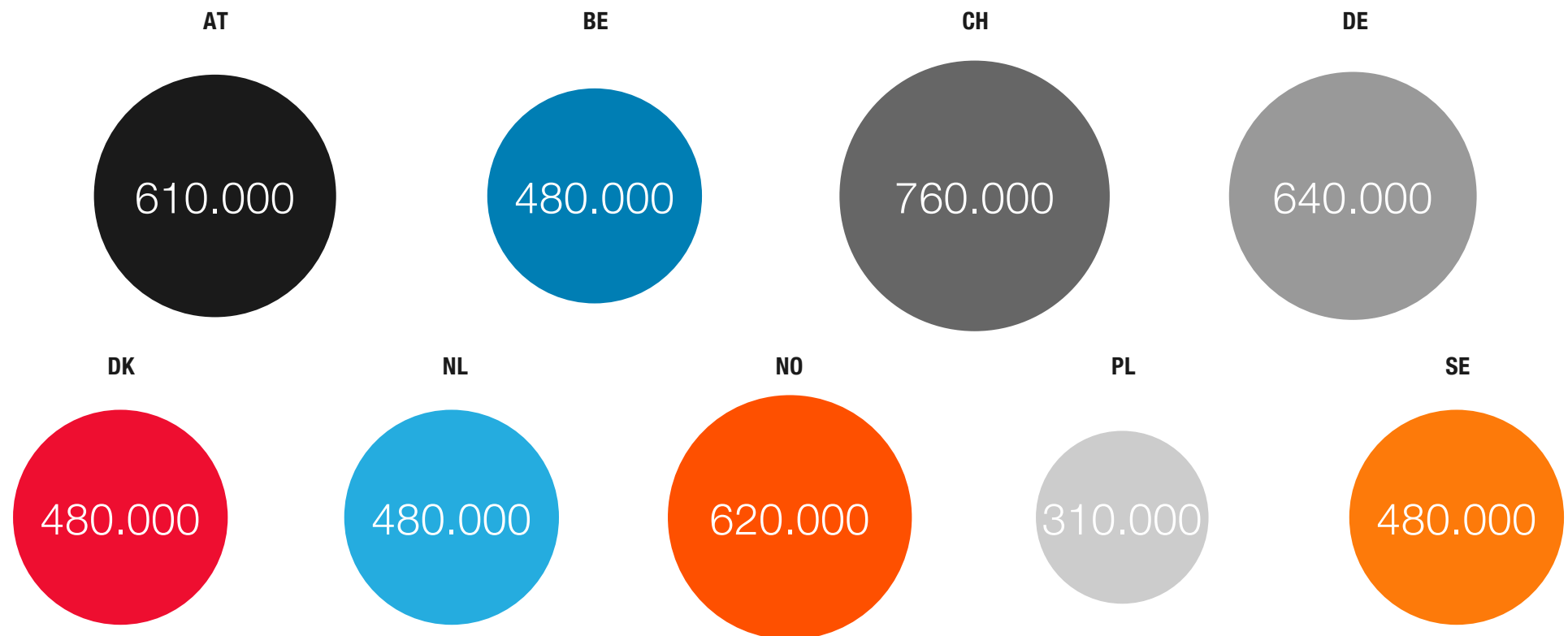
In the countries investigated in this study, companies invest EUR 13.0 billion per annum in content marketing.

13010

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



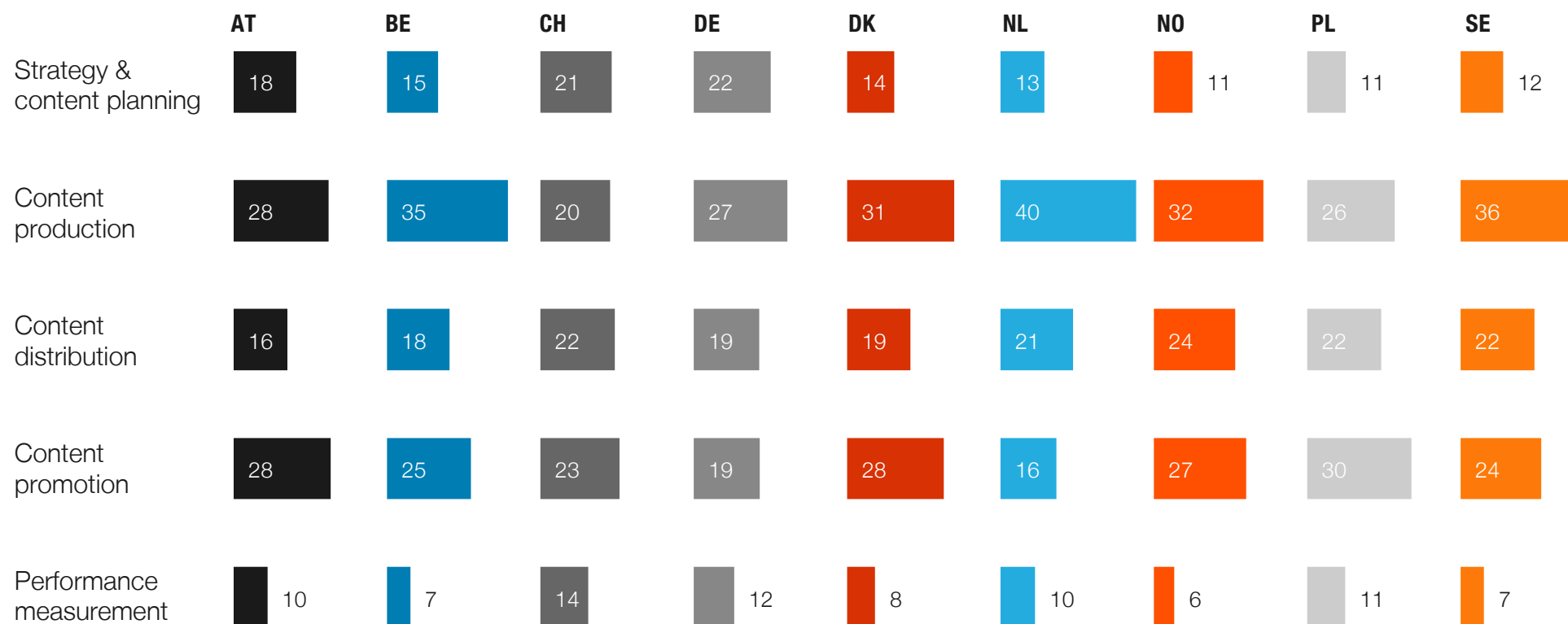
The mean annual content marketing budgets are highest in the German-speaking area and Norway.



Content marketing investments: activities in the content marketing cycle

38

Strategizing and planning is most pronounced in DE & CH, content production accounts for large budget shares in NL, SE and BE. Taken together, distribution and promotion attain large proportions in PL, NO and DK.



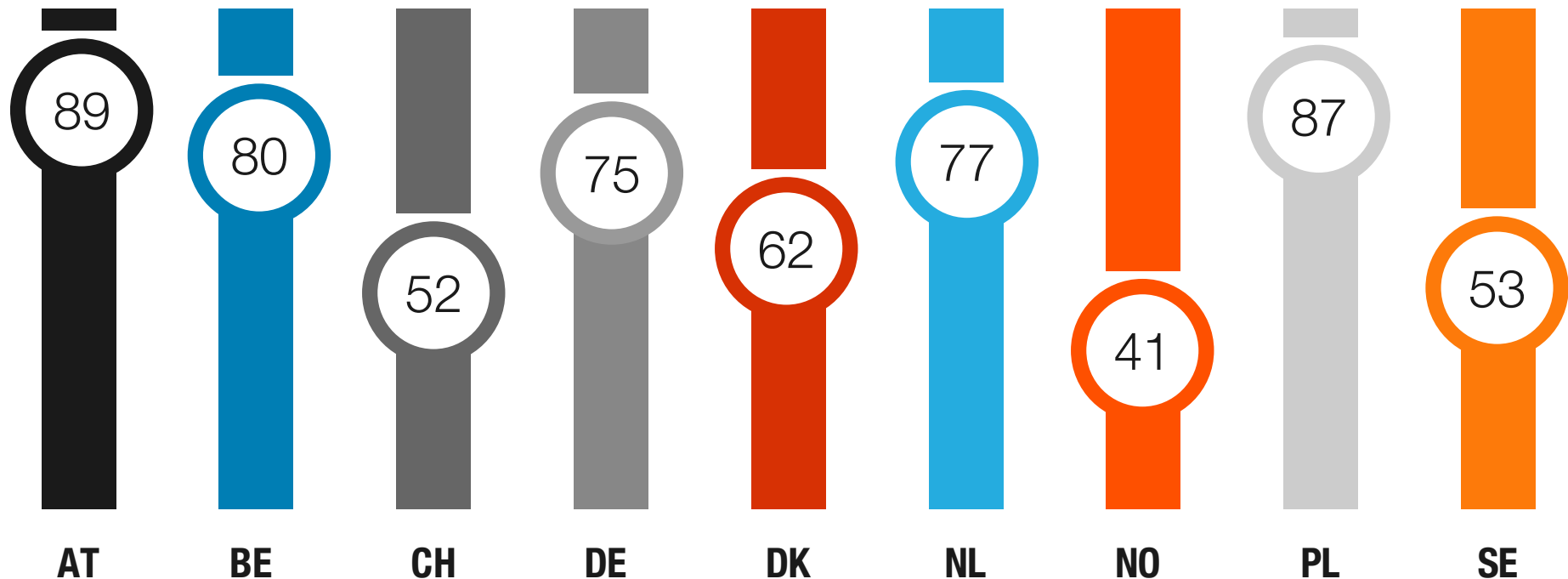
ICMF | Scion (2021) | % of total investments by activity | totals may differ from 100% due to rounding | countries in alphabetical order



Content marketing trends

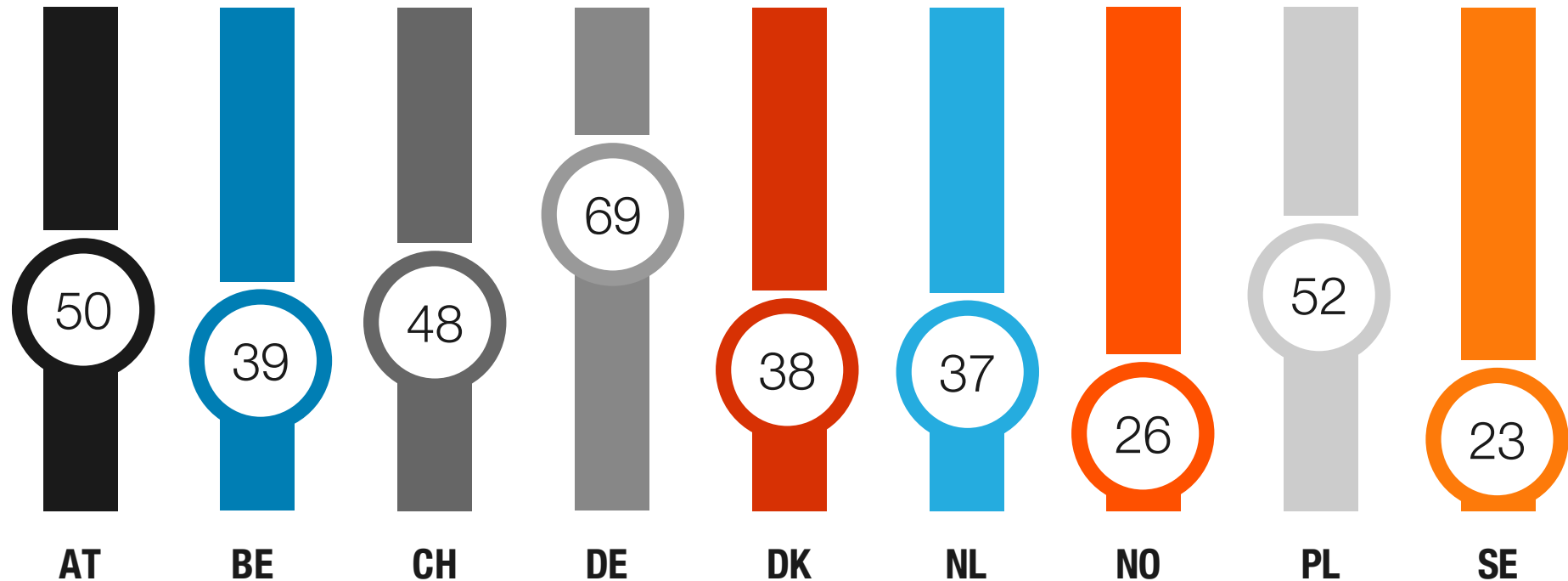
Even if the approval rates differ significantly when compared across Europe (41-89%), the majority of companies that use CM today in almost all countries expect investments to continue to rise.

We intend to invest a lot more in content marketing in the next three years.



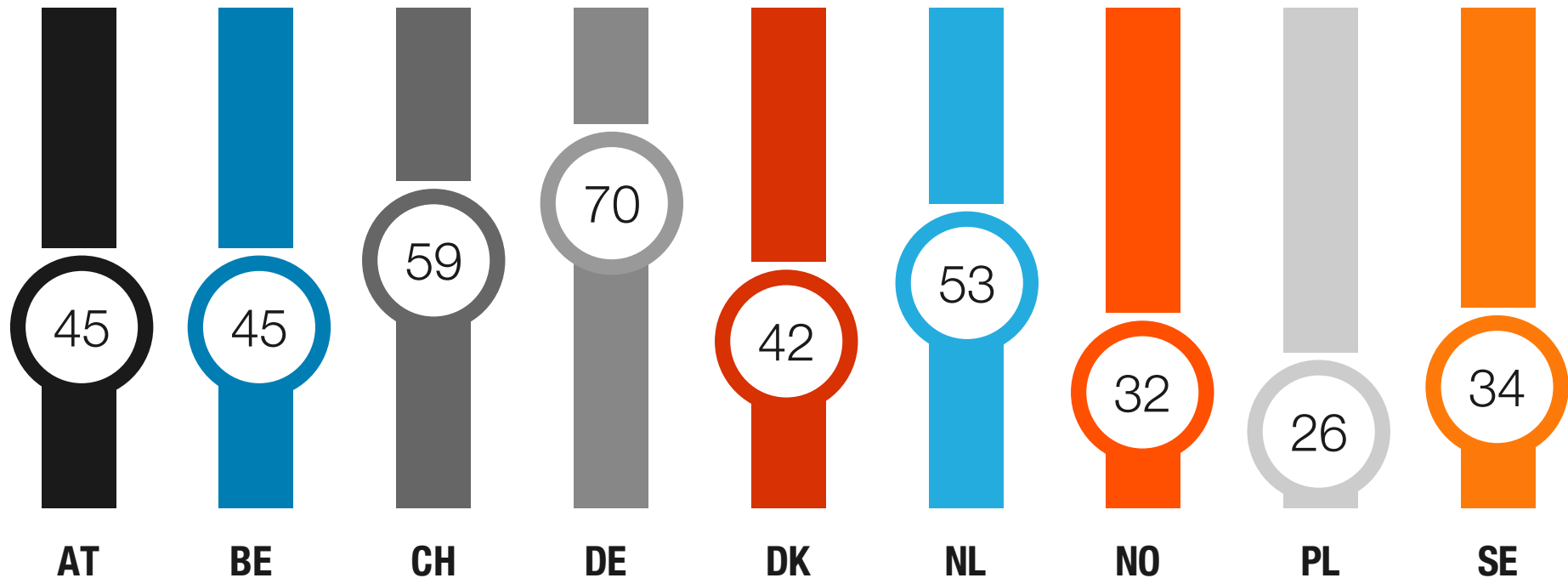
In Central European countries in particular, many companies have already recognized that content marketing also works internally, in that employees can be integrated, inspired for new things and taken on the change journey.

We are increasingly using content marketing to support change management processes.



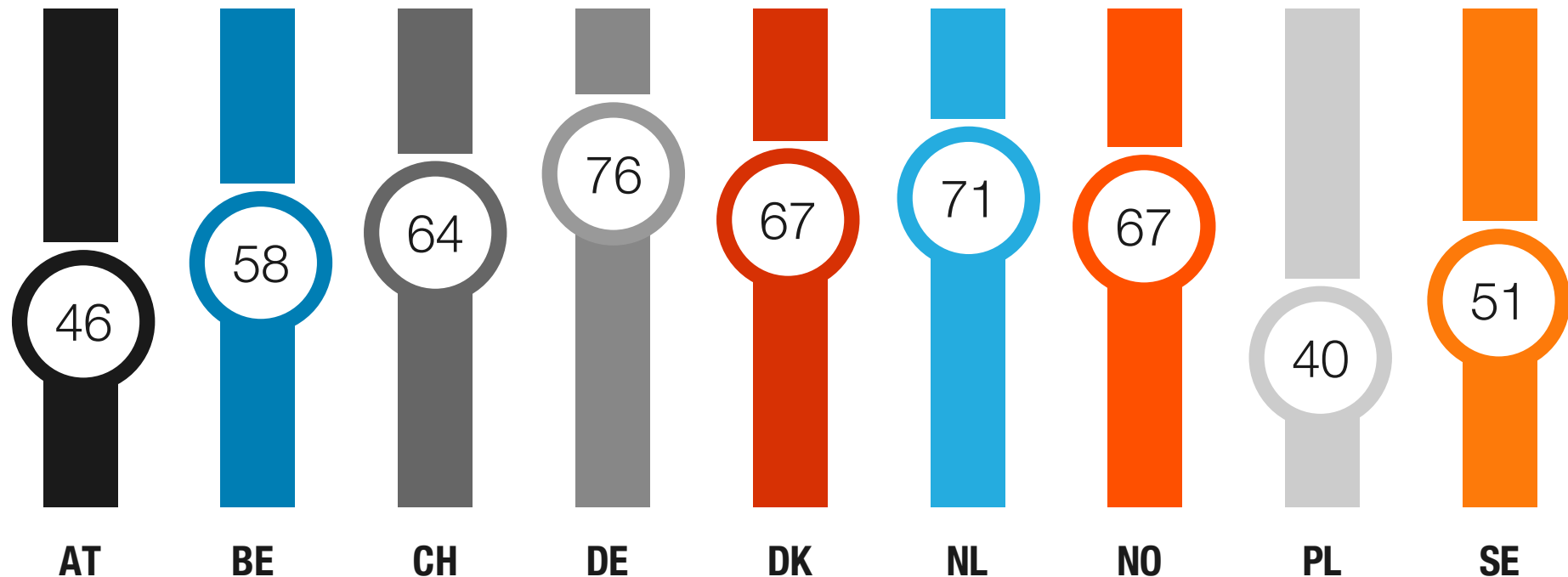
In particular in Germany, Switzerland and the Netherlands companies are increasingly using content marketing in their HR marketing, since it allows to tell potential employees a consistent story about a company and its job offers.

We are increasingly using content marketing in HR marketing.



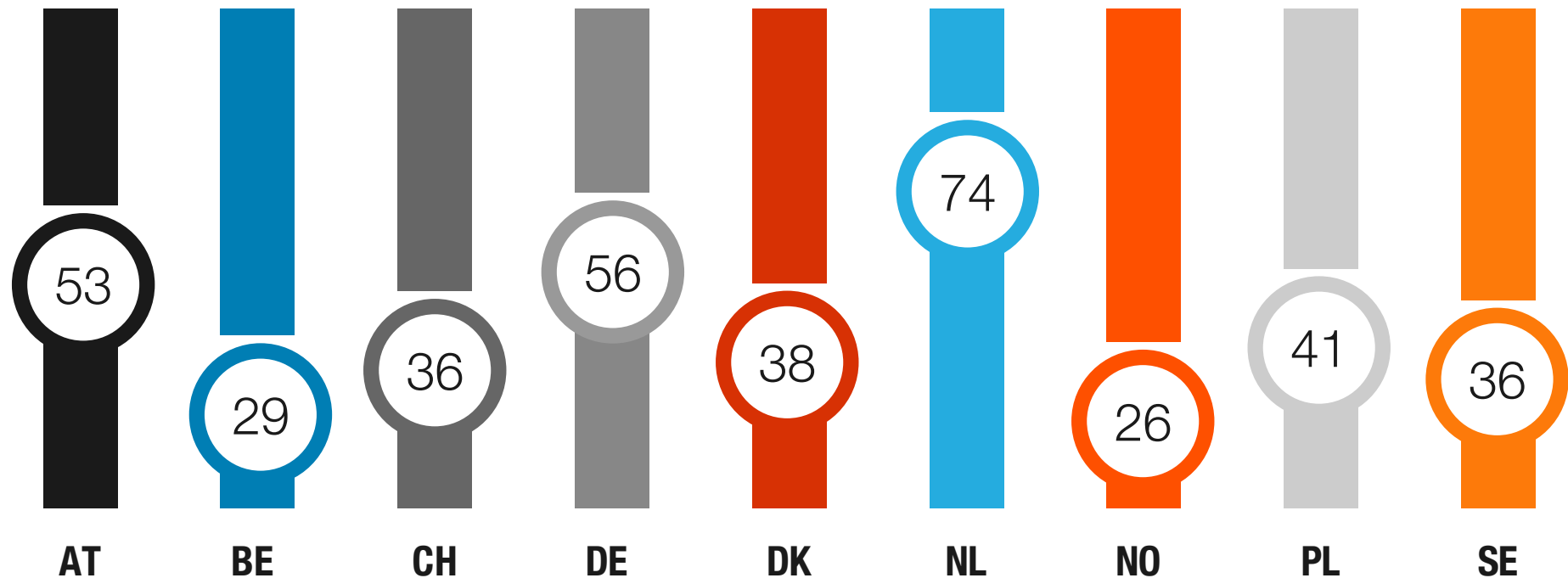
Content activism emerges from a fundamental concern for social problems and can offer positive economic effects (e.g., image improvement, boycotting). Hence, in most of the countries the clear majority of decision-makers consider it to be worth striving for.

Organizations should make social, political and environmental issues integral to their content marketing.



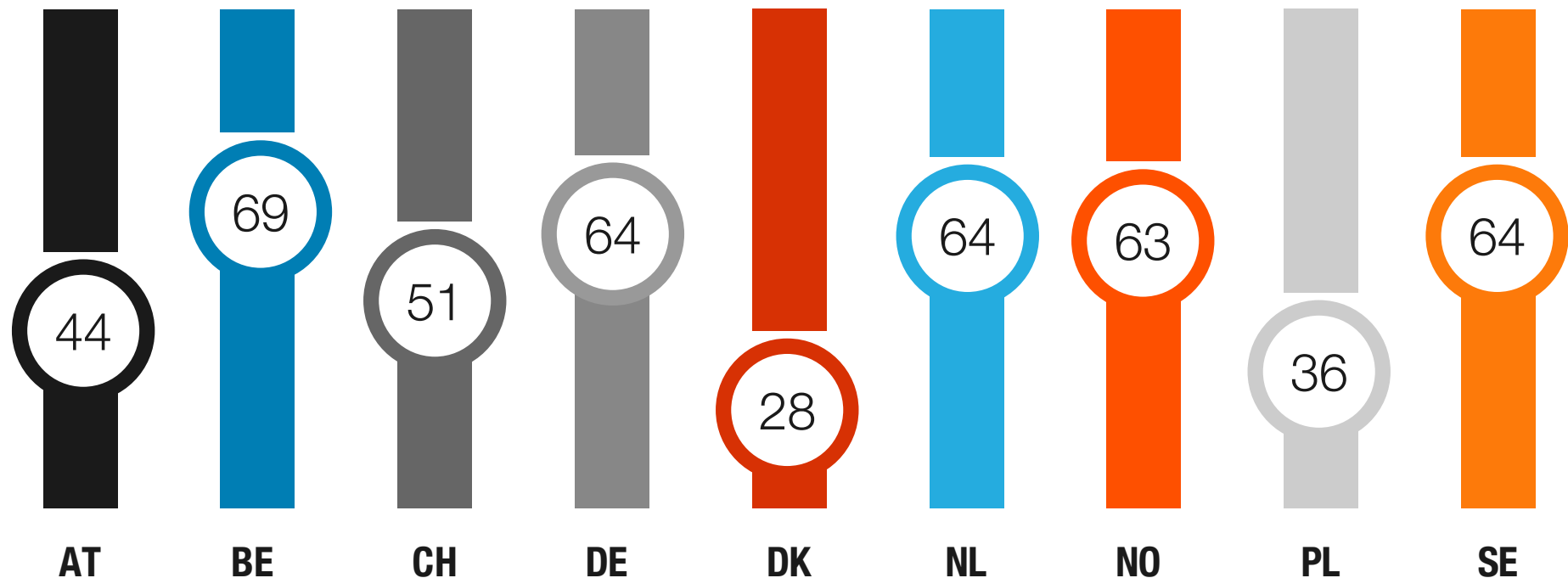
Podcasts are viewed very differently internationally. This form of communication is seen on the advance in the Netherlands, Austria and Germany in particular.

Podcasts are becoming increasingly important in content marketing.



In six of the nine countries, the majority of companies are planning a focused agency strategy (concentration on an 'inner circle').

We intend to streamline our agency business and work with a smaller number of partners but on a closer and more agile basis.

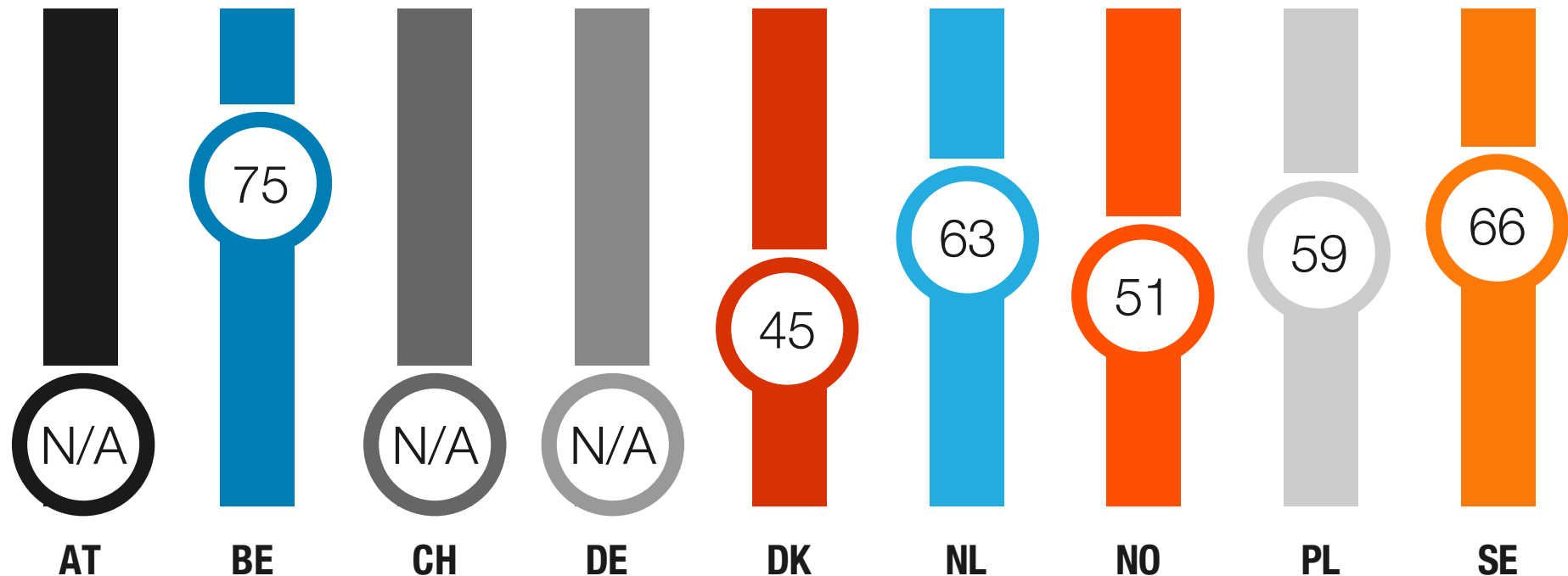




Effects of COVID-19 pandemic

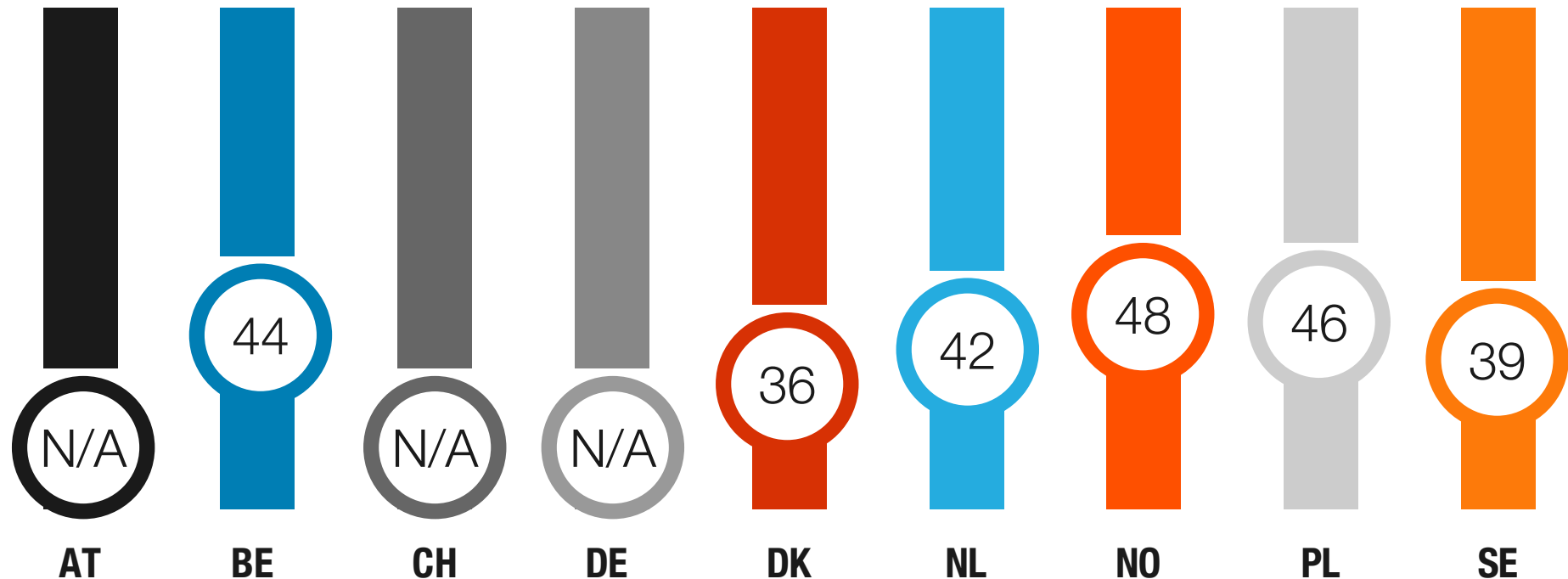
The COVID-19 pandemic is causing many companies to increasingly rely on social media in content marketing, particularly in Belgium, Sweden and the Netherlands.

We are focusing more on social media.



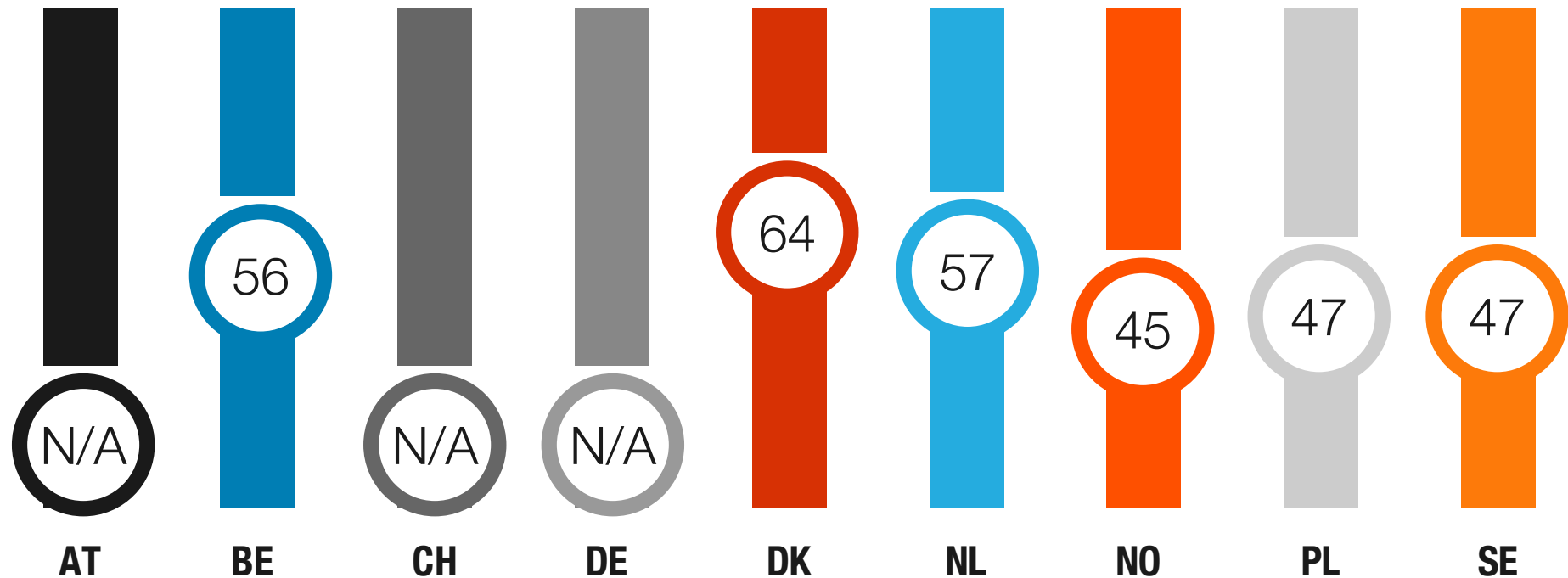
Contrary to what one might expect, the COVID-19 pandemic is only leading to a limited shift in the focus in content marketing to short-term sales support.

We are focusing more on short-term sales support.



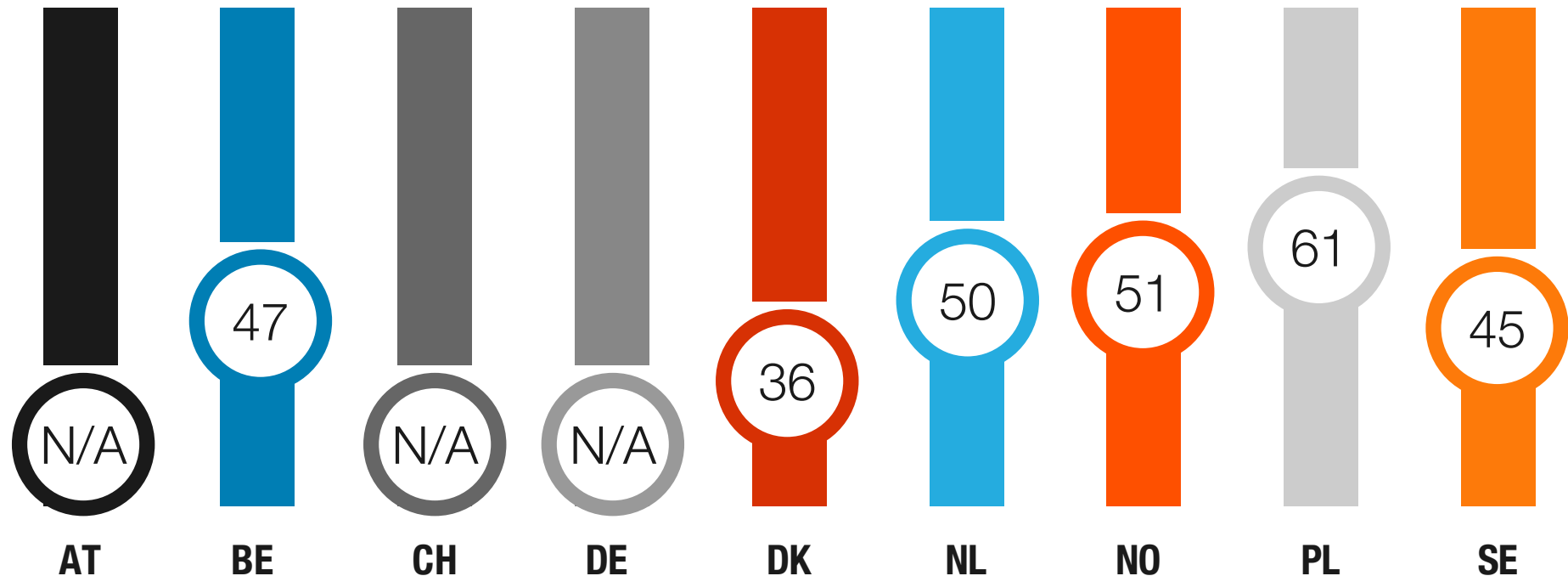
Notably, the COVID-19 pandemic is causing many companies to focus more on long-term branding in content marketing.

We are focusing more on long-term brand-building.



The COVID-19 pandemic is causing companies to focus more on time-limited communication projects – however, the data do not indicate a fundamental move away from long-term activities.

We are focusing more on time-limited communication projects (content marketing campaigns).



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