

Global Content Marketing Forecast 2015-19

*World's First In-Depth KPI Analysis of the Global B2B & B2C Content Marketing Industry
Covering Revenues, Growth, Key Growth Drivers, Emerging Opportunities & Challenges*

Content Marketing Platforms:

- Digital-Only Content Marketing
- Hybrid Print & Digital Content Mrktg.
- Non-Textual Content Marketing

Revenue Breakouts:

- Business-to-Business Content Mrktg.
- Business-to-Consumer Content Mrktg.
- Contracted Content Marketing
- In-House Content Marketing



Content Marketing Channels

- Branded Digital & DVD Videos
- Branded Games & Content Tools
- Branded Guest Postings, Articles & Case Studies
- Branded Mobile Content & Apps
- Branded Print & Digital Magazines
- Branded Print & E-Mail Newsletters
- Branded Printed Books & E-Books
- Branded Research Reports, WPs & Public Docs
- Branded Social Media Sites & Visual Content
- Branded Webinars & Online Presentations
- Sponsored Events & Event Publications

- First Edition of this emerging industry's KPI benchmark series covering the 2009-19 period, including 2014 actuals, 2015 pacing & 2015-19 forecasts
- User-friendly slide format for easy comparisons, internal reporting & presentations
- Value-add Excel Databook with drill-down datasets & data points, market-specific insights & perspective and 5-year projections by region, country, platform and channel
- Almost 1,500 content marketing agencies, publishers, affiliates and service firms identified in 80 countries, including almost 500 in the US and over 200 in the UK

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Global Content Marketing Forecast 2015-19

Exclusive market research & strategic intelligence from [PQ Media – Intelligent data for smarter business decisions™](#)

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About PQ Media and the PQ Media Intellicast (PQi) Series

PQ Media is a leading provider of econometric data and strategic insights to executives in the global media, entertainment and technology industries. PQ's researchers & analysts employ our proprietary econometric methodology to provide clients with actionable strategic intelligence necessary to achieve their growth objectives in a fast-changing global marketplace. The PQ Medianomics™ research system relies on comprehensive databases, proprietary algorithmic models and exclusive industry leader panels. We track, analyze and forecast media operator revenues, end-user consumption and consumer spending across more than 100 digital, alternative and traditional media platforms and channels in leading markets worldwide.

****Global Media & Technology Forecast Series (Annual 3-Report Suite)***

- Global Digital & Alternative Media Revenue Forecast 2014-18
- Global Consumer Usage of Digital Media Forecast 2014-18
- Global Consumer Spending on Digital Media Content & Technology Forecast 2014-18

PQ Media applies its proven econometric methodology and multi-channel research expertise to a new three-report annual Series to help executives in the global media, entertainment and technology industries gain a deeper understanding of the world's transforming media economies. This three-report Series provides the first holistic view of the world's media economies, focusing on digital & alternative media and profiling the 15 leading countries, including the US, which account for more than 85% of global advertising and marketing revenues. Each report in the Series provides comprehensive 5-year historical tracking and 5-year forecasts for one of the three critical and interrelated media ecosystem growth components: media operator revenues, consumer usage of digital media and consumer spending on digital content and technology worldwide. Series definitions, sectors, platforms and channels remain consistent across each Report making it easy to quickly compare growth patterns, drivers and performance in each country's advertising & marketing landscape.

Following are selected annual / biennial market research publications, multi-report bundles & special packages that are all part of the overall *PQ Media Intellicast Series™

- Global Branded Entertainment Marketing Forecast 2015-19
- Global Digital Out-of-Home Media Forecast 2014-18
- Global Digital Out-of-Home Media Forecast 2013-2017
- Global Product Placement Spending Forecast 2012-2016
- Global Digital Out-of-Home Media Forecast 2012-2016
- US Mobile & Social Media Forecast 2012-2016
- Global Digital Out-of-Home Media Forecast 2011-2015
- Global Branded Entertainment Marketing Forecast 2010-2014
- Global Consumer Exposure to Digital Out-of-Home Worldwide 2014
- Global Digital & Alternative Media Revenue Forecast 2013-17
- Global Consumer Usage of Digital Media Forecast 2013-17
- Global Consumer Spending on Digital Media Content & Technology Forecast 2013-17
- Social Media Sponsorships Forecast 2010-2014
- Global Digital Out-of-Home Media Forecast 2010-2014
- Word-of-Mouth Marketing Forecast 2009-2013

About PQ Media (cont.)

PQ MEDIA CLIENTS

PQ Media has accurately predicted key trends, insights and outcomes that have influenced strategic plans, investment parameters and tactical approaches for some of the world's most respected media companies, media agencies, financial institutions, and research & consulting firms:

Media Companies

- Associated Press
- NBC Universal
- News Corp
- Time Warner
- Turner Broadcasting

Financial

- Bain Capital
- Credit Suisse
- Deutsche Bank
- GE Commercial Finance
- JP Morgan

Agencies

- Dentsu
- Havas Media
- Hill Holiday
- Kinetic
- Starcom Worldwide

Technology/Telecom

- AT&T
- Cisco Systems
- Google
- Microsoft
- Qualcomm

Research/Consulting

- Bain & Co.
- JNK Consultant Network.
- McKinsey & Co.
- Nomura Research Institute
- Yano Research Institute

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Success in today's fast-changing media marketplace requires timely, accurate and actionable strategic intelligence. Let PQ Media help your organization move towards a successful digital media future with a no obligation situation review. Please contact Patrick Quinn, President, at pquinn@pqmedia.com or Leo Kivijarv, VP/Research at lkivijarv@pqmedia.com.

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Research Methodology

PQ Media's proven research methodology and proprietary mapping system – PQ Medianomics™ – utilizes proprietary data collection techniques, algorithmic models and analytical approaches to track, analyze and forecast spending, consumption and trends in all major media, platforms and channels of the media and entertainment industries. PQ Media's system, driven by our SpendTrak™ and UsageTrak™ databases, as well as our exclusive Global Opinion Leader Panel™ (GOLP), layers the impact of key data and variables, including economic, demographic, behavioral, technological and regulatory.

In defining, structuring, sizing and forecasting global industries and markets, such as content marketing, branded entertainment and digital out-of-home media, PQ Media seeks input from our exclusive Global Opinion Leader Panel™, which includes several hundred executives at media and entertainment companies, financial institutions, consulting firms, media agencies and brands regarding various data and information driving key trends and growth in campaign media spending. We also examine thousands of public and private documents from more than 1,000 sources pertaining to regional and market-specific trends and data in content marketing, the advertising & marketing ecosystem; economic sectors & demographic profiles; and any other factors, such as technology penetration rates, that might affect the content marketing industry, overall advertising environment, the economy and consumer media usage behavior & spending patterns.

PQ Media's proven econometric methodology is set apart from other media research sources in a number of important ways. For example, PQ Media doesn't use standard rate card data and estimated impressions as the methodological foundation of our spending and growth algorithms. Our consistent, comprehensive and in-depth mapping of the entire media and entertainment landscape provides industry stakeholders with a complete picture of how the spending and usage patterns of consumers, businesses, brands and agencies are changing at an increasingly rapid pace, driven by technology innovation and emerging digital media.



Research Methodology (cont.)

Some data in this Report were published in related PQ Media reports just released in 2H14. Revenues from other ad media, as well as the overall ad market used for comparisons were first published in the *Global Digital & Alternative Media Revenue Forecast 2014-18*. To be consistent, revenue data relating to other media used in select charts were not revised, including Branded Entertainment. Any charts relating to media consumption and technology penetration rates were first published in the related *Global Consumer Media Usage & Exposure Forecast 2014-18*.

Both publications are part of PQ Media's best-selling annual KPI benchmark trilogy, the *Global Media & Technology Forecast Series 2014-18*, a three-part competitive intelligence suite delivering the only holistic view of the changing global media ecosystem. Organized by region, country, medium, channel, technology and cultural generation, the PQ Media & Tech Bundle covers over 100 digital & traditional channels, diving deep into the Top 15 Global Markets, including the US.

Click on any of the links to visit PQ Media's Research Report webpage to download free executive summaries of last year's three reports.

[Global Digital & Alternative Media Revenue Forecast 2014-18.](#)

[Global Consumer Media Usage & Exposure Forecast 2014-18.](#)

[Global Consumer Spending on Media & Technology Forecast 2014-18.](#)

Success in today's fast-changing media economy requires timely, accurate and actionable strategic intelligence. Let PQ Media help your organization move towards a successful digital media future with a free, no-obligation situation review. To schedule your review, please contact Patrick Quinn at pquinn@pqmedia.com or Dr. Leo Kivijarv at lkivijarv@pqmedia.com or call 203-569-9449.



Global Content Marketing Forecast 2015

Brief History of Sizing Content Marketing

Past Attempts to Size & Segment Content Marketing

- In 1997, Veronis Suhler Stevenson (VSS), partnering with the Magazine Publishing Association, estimated that US custom publishing was approximately \$1 billion
 In 2001, now partnering with the Custom Publishing Council (CPC), VSS updated the size to \$1.2 billion
 In 2005, VSS valued custom publishing at \$22 B based on CPC's production data only; CPC valued it at \$65 B, including distribution & salaries
 In 2006, VSS revised custom publishing data solely by revenues generated by outsourced companies at \$3.5 B, to be consistent with other media platforms (see definitions)
(Note: PQ Media executives served as research & editorial directors from 1997 to 2012 on all efforts by VSS to size content marketing)
- In 2013, CPC, now Custom Content Council (CCC) published last sizing of custom content industry at approximately \$40 billion in *Content* magazine
PQ Media published first global outsourced custom content revenue at \$8.8 billion in inaugural *Global Digital & Alternative Media Forecast 2013-17 (GDAMF)*
 In various articles e-Marketer incorrectly cited for global content marketing spend at \$118 billion, but it never did a study as data from whitepaper on overall digital advertising
- In 2014, PQ released second edition of its GDAMF report with an updated figure for global content marketing at \$9.2 billion**
Business Insider estimated US Native Advertising at \$8 billion based on Interactive Advertising Bureau data
 Content Marketing Institute (CMI) published *Content Marketing Playbook* with 23 content marketing categories, but no revenue data

VSS (1997 & 2001)

- Custom Publishing
(No categories)

VSS/CPC (2005-10)

- Custom Publishing
 - Print Magazines
 - Print Newsletters
 - Print Tabloids
- Other Custom Content (Video/Digital)
- Outsourced Custom Publishing
- In-House Custom Publishing
 - Production
 - Distribution
 - Salaries

VSS/CCC (2011-12)

- Custom Publishing
- Electronic (Digital) Custom Content
- Other (Video) Custom Content
- By End User
 - Business-to-Business
 - Consumer
- In-House Custom Content
 - Production
 - Distribution

CCC/Content (2013)

- Total Custom Publishing
(No categories)

PQ Media (2013-14)

- Print Custom Publishing
- Electronic Custom Content
- Online Custom Content
- Mobile Custom Content

Business Insider (2014)

- Native Display
- Native Social
- Sponsorships

CMI (2014)

- See Definitions
(No spending figures)

PQ Media's Rational for Global Content Marketing Forecast 2015-19

- The content marketing industry has adopted CMI's 2014 taxonomy, which expands upon a more narrow focus defined by the CPC in 2005 and revised by the CCC in 2011, as referenced on the previous slide. The new taxonomy includes content materials not used in the past analysis to determine the overall size of the industry, such as sponsored research reports, games and conferences. Interest in content marketing continues to grow, including entire issues of trade magazines dedicated to the subject like *Advertising Age* (10/14/14); multiple references to content marketing campaigns highlighted in magazines like *AdWeek*, (5/14/15); the inclusion of content marketing in juried marketing awards like the CLIOs; and a plethora of presentations, whitepapers, blogs and infographics being published annually.
- As a result, PQ Media decided to broaden its analysis of content marketing revenues to include all 23 channels referenced by the CMI. However, PQ Media found that it needed to combine a number of channels, as it was difficult to determine the size of smaller channels, such as sponsored videos and branded content tools, in emerging markets like Mexico and India. A list of our 13 combined categories is found in the following section on segmentation & definitions. Furthermore, we also found that many of the channels had common characteristics, so we combined numerous categories into three platforms: hybrid print and digital editions, digital-only content, and non-textual content.
- It should be noted that this is an analysis of the size and forecast growth of the content marketing industry that includes trends we identified as market drivers. It does not include results from surveys of brand and agency executives relating to budget plans, channels used and the level of satisfaction, as we did not want to replicate the fine work already being done annually by trade associations referenced earlier, such as the CC and CMI, and by market-specific firms, such as Eva Sanagustin in Spain. We reference these research reports in select markets when possible, including key highlights, as well as used the results in our forecast algorithms, along with other variables referenced in our methodology, such as proprietary insights from our Global Opinion Leader Panel members.

Following is the *PQ Media Content Marketing Forecast 2015-19* by three platforms and 13 categories, with analysis on overall global content marketing revenues and spending in four regions and the top 15 global markets.

Global Content Marketing Forecast 2015

Segmentation & Definitions

Content Marketing Definition

- **Content Marketing**: Formerly entitled custom publishing and custom content, and sometimes described today as branded entertainment, print advertorials or native advertising.
- Content marketing is an alternative marketing platform that targets specific audiences with content related to the target's interests, beliefs and needs. It differs from product placement, a branded entertainment channel, in that content marketing messages are exclusively sponsored by brands in a stand-alone product, whereas product placement is embedded into existing content, such as TV programs that would be produced regardless of any paid placements.
- PQ Media also differentiates content marketing by the intended end user – businesses (B2B) or consumers, which are identified by the method used to distribute the materials, such as e-newsletters sent to automotive executives versus print magazines sent to consumers who purchased a certain automobile brand.

Content Marketing Definition (cont.)

- PQ Media also makes a distinction between content marketing revenues and spending. Content marketing **revenues** is specific to monies generated by companies in the content marketing field, such as McMurray/TMG and dedicated divisions within ad agencies and PR firms, such as OgilvyEntertainment, that are specifically contracted by brands to develop content marketing materials. In order for content marketing to be compared with other media platforms, such as television, this is the primary data used in the table and charts of this report, as it corresponds with sizing data in all other media platforms. For example, when the size of TV advertising is analyzed by Wall Street firms, no analyst includes the cost of producing commercials, rather limiting the size of the industry to what TV networks and stations generate in ad revenues.
- Content marketing **spending** includes the brand's overall budget for content marketing, including the aforementioned contracted projects, as well as the production and distribution costs they spend in-house. For example, a brand might have a dedicated division within its corporate communications department whose sole purpose is to update a blog touting new products and services, such as Xerox's *Simplify Work* blog. Spending would include the costs associated with posting a video produced by the staff of customer reactions to a new product. In-house spending is included in this report because similar data was released in the past by the CCC, among others, and therefore PQ Media wanted to remain consistent with previous data published on content marketing. Content marketing revenues would be considered above-the-line costs, while in-house spending would be considered below-the-line costs.

Digital Only Content Marketing Definition & Channels

- **Digital Only Content Marketing** include categories that are text based and specific to internet and mobile media only in that they can not be found on any traditional media platform. The material is funded by at least one brand in a stand-alone product at a specific audience, and is separate from the e-commerce sites of the sponsored brands.
 - ***Branded Guest Postings, Articles & Case Studies:*** Targeted materials produced by a third-party source that are embedded onto web pages dedicated to content marketing by a specific brand, such as LinkedIn.
 - ***Branded Mobile Content & Apps:*** Custom materials that have been produced specifically for wireless devices – smartphones, tablets and/or e-Readers – and is not available in the same format on an internet site, such as a sponsored tweet on Twitter.
 - ***Branded Social Media Sites & Visual Content:*** Dedicated websites, such as a blog, podcast or microsite, that are specific to content marketing and separate from the brand's e-commerce site because of the entertainment or informational content that is posted, such as a brand's Facebook page. It also includes any branded visual content that includes a text explanation of the graphics, such as infographics and photos.
 - ***Branded Webinars & Online Presentations:*** Text-based branded educational materials on a specific subject aimed at a target audience that is often invited to attend, such as clients, or opt-in, such executives in a particular vertical field like automotive, and who listen to the accompanying verbal explanations of the bullets and charts, such as the PQ Media presentations on social media sentiment of the top-100 global brands which was sponsored by uberVU. . It does not include a video presentation in which the brand representative is seen often as slides are being discussed.

Hybrid Print & Digital Content Marketing Definition & Channels

- **Hybrid Print & Digital Content Marketing** includes text-based content marketing materials that are available in both print and digital formats, although they might be accessed exclusively through digital distribution, such as an e-mail of a sponsored research report PDF. There are instances the digital materials are printed and used as a leave-behind for clients after a sales call, and thus considered a hybrid publication.
 - ***Branded Print Books & e-Books:*** Chapter-based branded content that provides the target audience with a perspective as how the brand's product or services fit within the entire vertical ecosystem, such as a book on content marketing strategies published by an independent consultant, which attempts to bring credibility to the author(s) for future project assignments on the subject.
 - ***Branded Print & Digital Magazines:*** Article-based branded content that provides the target audience with examples of the brand's products within the context of the vertical issues, such as referencing a specific automobile on a branded story regarding the new regulation to include back-up cameras in all cars by the end of the century. Special sections with multiple sponsored stories have also been called advertorials, and branded references on magazine covers have sometimes been called native advertising.
 - ***Branded Print & Digital Newsletters:*** Short, themed based subscription-based periodical on a vertical subject related to the brand, such healthcare. Print newsletters are usually 4 to 8 pages in length, while digital newsletters are usually distributed by e-mail, also called e-newsletters.
 - ***Branded Research Reports, Whitepapers & Public Document Filings:*** Sponsored text material that often uses specific terminology that meet industry standards, such as statistical or financial measurement tools that are deemed acceptable to the end user like defining the survey methodology or stock market profit formulas found in annual reports.

Non-Textual Content Marketing Definition & Channels

- **Non-Textual Content Marketing** includes sponsored audiovisual or live components to highlight a brand's uniqueness on a topic of interest to the target audience. They are stand-alone products that were produced specifically by the brand to entertain or inform the target audience.
 - ***Branded DVD & Video Content Marketing:*** Marketing materials that demonstrate the brand's product or services, such as a Walt Disney DVD on its theme park. It also includes branded online entertainment or informational programs, primarily on Multiple-Channel Networks (MCN) on social media sites, like YouTube, in which the brand is featured within the script. For example an appliance manufacture might sponsor an MCN starring a famous chef who uses the brand's stove and references the product periodically while cooking.
 - ***Branded Games & Content Tools:*** Primarily online or mobile games, including the digital extension of console videogames, in which the brand provides incentives to use something associated with their products, such as characters linked to a soft drink flavor with certain skills no other character possesses. Content tools are games of skill or chance, such as trivia contests, in which the end user must know certain attributes about the brand in order to win a prize or get a coupon.
 - ***Sponsored Events & Event Publications:*** Dedicated live events that highlight the brand's products through informational sessions or in branded publications distribute free to attendees. To avoid double-counting, this category does not include business-to-business live trade shows, conferences, seminars & virtual trade shows in which multiple vendors are able to exhibit their products and services. It also does not include most consumer events, which is included with PQ Media *Global Branded Entertainment Forecast* series, such as sponsored concert series and event marketing that occurs in conjunction with other events, such as branded tents on beaches during the US college Spring Break period.

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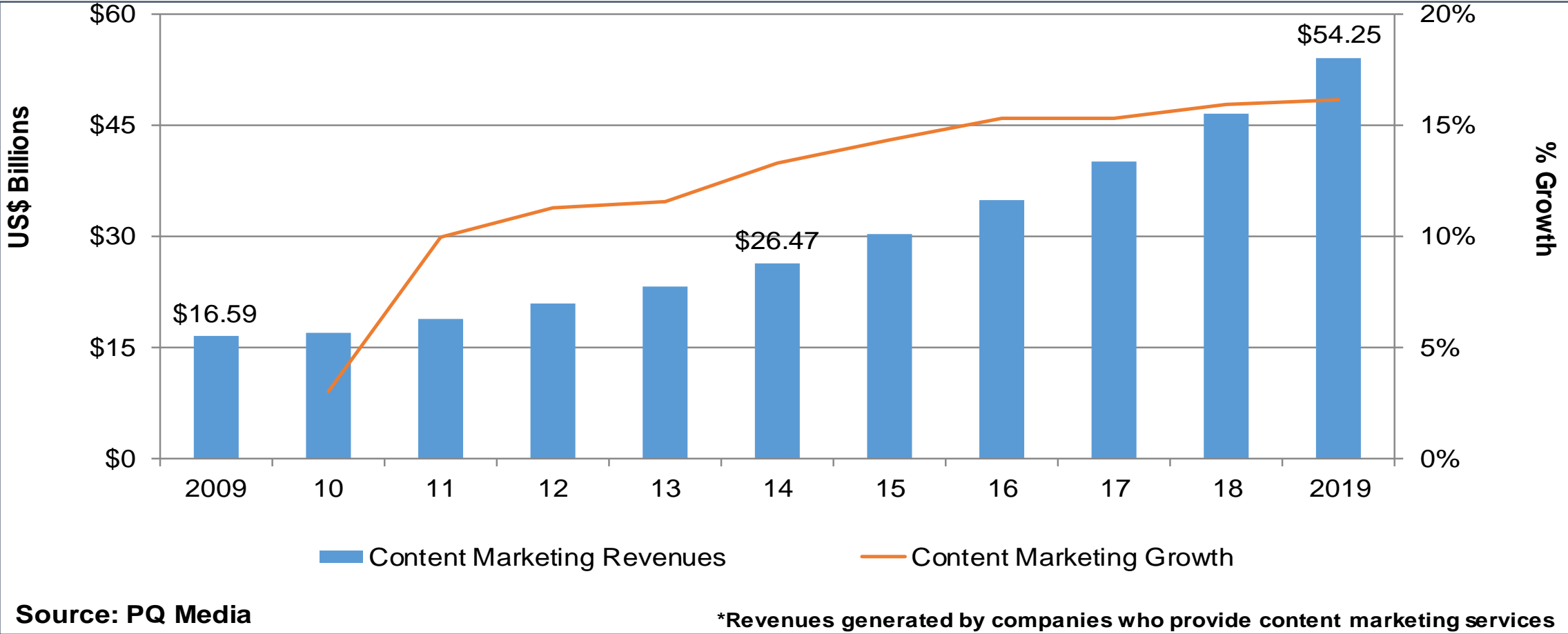
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Global Content Marketing Forecast 2015

Key Trends

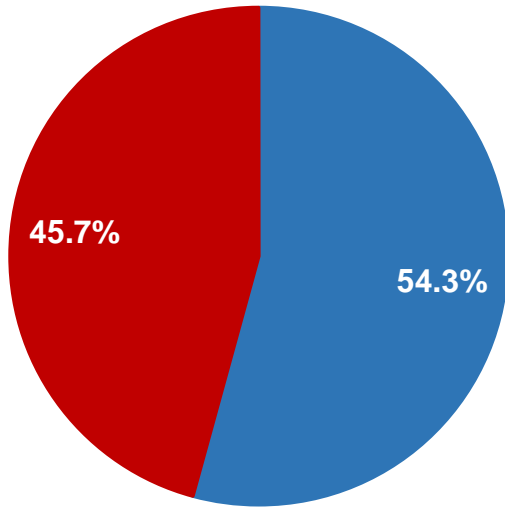
Global Content Marketing Revenues Rose 13.3% in 2014 to \$26.47 Billion Expected to Post a CAGR of 15.4% to \$54.25 Billion by 2019



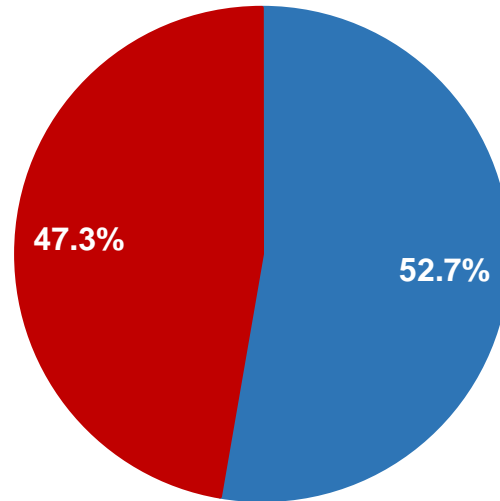
B2B Larger Global Content Marketing End User Sector – 52.7% Share

B2C Content Marketing Growing Faster – 14.3% in 2014 vs. 12.5% for B2B

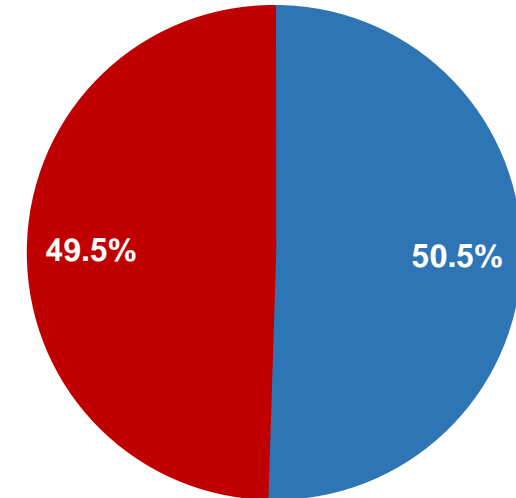
Content Marketing by Targeted End Users in 2009



Content Marketing by Targeted End Users in 2014



Content Marketing by Targeted End-Users in 2019



■ B2B Content Marketing ■ B2C Content Marketing

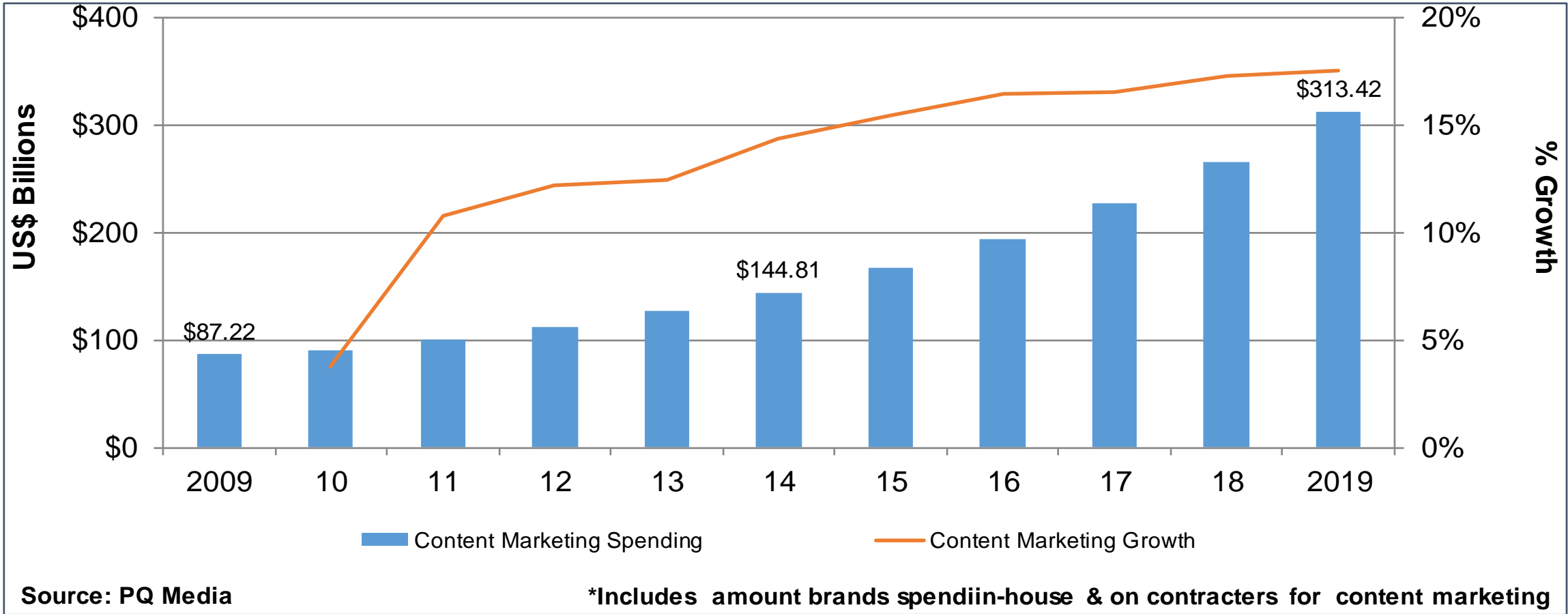
US Largest Content Marketing Market in 2014

UK Among Fastest Growing, Italy Slowest Growth Market

Contracted Content Marketing	
2014 Revenues	2014 vs. 2013 Growth
United States	South Korea
Germany	Canada
Japan	China
United Kingdom	United Kingdom
France	India

Source: PQ Media
 IUS ranked 11th in growth

When In-House Spending Included, Global Content Marketing \$145 B Industry, Growing to over \$313 B in 2019



Global Content Marketing Trends to Watch in 2015-16

- Number of brands using content marketing continues to grow annually, particularly in emerging markets;
- B2C (Consumer) content marketing is forecast to grow faster than B2B (Business) content marketing;
- Mobile content & apps will be fastest growing of PQ's 13 content marketing (CM) channels;
- Microsoft's development of Multi-Channel Networks expected to fuel branded video growth;
- Major brands, however, monitoring changes at social nets like YouTube, which seek to share revenues;
- Sponsored market research and webinars among fastest growing B2B content channels;
- Proliferation of self-publishing sites driving growth of sponsored books – fastest growing print channel;
- Sponsored games & branded content tools to be used more to engage young demos, such as iGens;
- More global events being held to help B2B & B2C content publishers educate & sell CM to brands;
- Measurement remains challenge for brands to feel more “satisfied” with CM campaign results

Key Trends by Region & Market: Americas

Americas

- **United States:** The US is the largest global content marketing market, including all three sectors of the industry. Content marketing has its roots in this country back to the 19th century, and it was the first nation to monitor trends that were driving market growth, such as the first-ever reports, trade organizations and magazines. Double-digit growth is projected for the market as brands continue to seek alternatives to traditional advertising, and media companies seek alternative revenue streams to offset declining ad sales.
- **Canada:** Due in large part to its proximity to the US, Canadian brands have embraced content marketing with 90% of the population living within a 100 miles of the US border, thus being exposed to content marketing examples for decades. Canada, however, differs from the US market in that there are stricter media regulations, particularly to video content that might affect children, as well as the need to develop content marketing messages in both English and French.
- **Brazil:** Content marketing in Brazil surged in 2014 during the FIFA World Cup, with the same expected again in 2016 when the country hosts the Summer Olympics. However, hosting the two sporting events masked the fragile nature of the Brazil economy, which might lead to decelerating growth if the government doesn't institute austere measures that will benefit the population in rural areas away from where the games were held.
- **Mexico:** Mexico is the smallest content marketing market worldwide due to the lack of experts outside the Mexico City region. It also lags in growth because the country has one of the lowest digital device penetration rates globally as a result of the mountainous terrain and inability to wire the rural areas of the country. Brands have also cut back content marketing budgets due to the sluggish tourist market which is suffering from drug-related violence in cities that had been popular destination, such as Acapulco.

Key Trends by Region & Market: Europe

Europe

- **United Kingdom:** The UK ranks only behind the US in the number of dedicated firms that provide content marketing. London is the headquarters of numerous global trade associations that cover this market, and it was the first European nation to host conferences on the industry. High broadband and smartphone penetration rates have fueled growth in digital content marketing channels, as the UK is among the market leaders in media consumption using digital devices.
- **Germany:** Brands are a little hesitant to commitment to large content marketing campaign because of recent fluctuations in the economy. Two years ago, Germany's banks were called upon to bear a heavy load in stabilizing the Euro, which once again faltered in 2015. In 2014, the economy staggered when Germany was forced to join the international boycott of Russia, one of its largest trading partner, due to the Crimean conflict.
- **France** Content marketing growth in France has lagged many other global markets when it fell back into a recession in 2013. French brands have not embraced content marketing as quickly as other European nation due to a relatively weak infrastructure of firms that specialize in the industry, particularly outside Paris. However, brands are becoming more accepting of the practice now that it is a judged category at the international advertising awards conference held annually in Cannes.
- **Italy:** Italy has been one of the slowest growing content marketing markets, along with Spain, due to the protracted recession that has plagued the nation since 2011. Some brand initiatives to use content marketing in an integrated media campaign were tabled until the economy improved. Furthermore, digital campaigns that are proving successful in other global markets are having difficulty gaining traction in Italy because the country lags in broadband penetration due to the difficulty wiring towns in their mountains.
- **Spain:** Similar to Italy, Spanish content marketing growth lags other global markets due to an elongated recession that has severely impacted the country since 2011. One bright spot is that the prices for digital devices plummeted during this time, making smartphone and tablets affordable to much of the middle class, regardless of the weak economy. As a result, Spain is expected to be among the fastest growing markets once the economy rebounds as brands use digital content marketing channels.
- **Russia:** Content marketing in Russia surged during the first half of 2014 when it hosted the Winter Olympics. However, revenues plummeted in the second half of the year when the economy faltered, first due to the international boycott surrounding Russia's role in the Crimean conflict, followed by a steep decline in energy prices that led to high inflation. Content marketing is expected to surge during the forecast period, particularly in 2018 when Russia hosts the FIFA World Cup. .

Key Trends by Region & Market: Asia Pacific

Asia Pacific

- **China:** in many previous PQ Media reports on other emerging media, China has normally been among the fastest growing markets, which is not true for content marketing. First, there aren't many experts in the country who can work with brands to plan content marketing campaigns, although Hong Kong firms are starting to fill the void as they expand into mainland China. Second, China's economy has been decelerating because of a housing bubble caused by building large cities that are almost vacant today;.
- **Japan:** Content marketing has a solid history in Japan due to initiatives by Dentsu, the largest marketing agency in Asia Pacific. However, Japan annually ranks near the bottom in growth because of economic issues, such as the 2011 tsunami that wrecked havoc on many manufacturers. While austere measures put into place by the prime minister prompted a short recovery in 2013, a decades-old practice of firms partnering with multiple companies have kept profits low due to the under performing partners.
- **South Korea** Although South Korean is the most tech-savvy nation in the world, with 100% broadband penetration, it lags other developed countries in the size of its content marketing industry. Companies are adverse to self-promotion, thus public relations has never been an important part of the marketing ecosystem, and PR firm are at the forefront in propelling growth in content marketing. However, there is an expected surge in content marketing when the country hosts the 2018 Winter Olympics.
- **Australia:** Australia is the strongest content marketing market in the Asia Pacific region due to its close ties to the two largest markets – US and UK. Numerous companies, particularly marketing agencies, have offices in all three countries, so it is not uncommon for successful content marketing campaigns that worked in those two nations to be adopted in Australia. It also has among the strongest digital technology infrastructures globally, so fast growing channels like social media content are surging in this market..
- **India:** India is among the fastest growing content marketing markets globally, as well. It has a strong economy, propelled by a growing middle class, particularly in outsourced telemarketing centers around the country .More importantly, with a plethora of new young executives taking over command of marketing agencies, old forbidden practices, such as promoting brands through content marketing and branded entertainment, are no longer taboo media channels..

PQ Media first published content marketing data in the *Global Digital Media & Technology Forecast Series*. This three-part report series delivers the first holistic map of the media ecosystem. It is organized by country, medium, channel, device, generation and gender, covering more than 100 digital and traditional media channels and 15 leading global markets, including the US. The findings are comprehensive, data rich, and forms the foundation of essential media business intelligence. Click on any of the links below to visit PQ Media's Research Report webpage and download the free executive summaries of last year's reports

[Global Digital & Alternative Media Revenue Forecast 2014-18.](#)

[Global Consumer Media Usage & Exposure Forecast 2014-18.](#)

[Global Consumer Spending on Media & Technology Forecast 2014-18.](#)



Success in today's fast-changing media economy requires timely, accurate and actionable strategic intelligence. Let PQ Media help your organization move towards a successful digital media future with a free, no-obligation situation review. To schedule your review, please contact Patrick Quinn at pquinn@pqmedia.com or Dr. Leo Kivijarv at lkivijarv@pqmedia.com or call 203-921-5249.

Global Digital & Alternative Media Revenue Forecast 2014-18
 Deep-Dive Data & Analytics by Region, Country, Media Sector, Platform & Channel
 2nd Annual Edition
 Global Digital Media & Technology Forecast Series
 Report #1 of 3 in Series

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- 5 Leading Countries
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- 40 Digital & Alternative Channels
- 11 Traditional Media Platforms
- Definitions by Sector, Platform, Channel
- Rankings by Region, Country, Platform, Channel
- 2008-13 Actuals
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Top 15 Global Markets

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- Canada
- China
- France
- Germany
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- Japan
- Mexico
- Russia
- South Korea
- Spain
- United Kingdom
- United States

Global Consumer Spending on Media Content & Technology Forecast 2014-18
 Most Credible, Consistent, Actionable Intelligence on Consumer Buying Patterns
 Report #3 of 3 in PQ Media's Global Media & Technology Forecast Series 2014
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