

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 Marketing
- Non-Textual Content Marketing

Content Marketing Revenue Breakouts

- Business-to-Business Content Marketing
- Business-to-Consumer Content Marketing
- Pure-Play Content Mktg Operator Revenue
- Content Mktg Op Rev from Other Media
- Internal Brand Spend on Content Marketing



Content Marketing Channels

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

- 2nd edition of industry's only comprehensive KPI benchmark series covering the 2011–2021 period w/ 2011-15 historical data, 2016 year-end data & 2017-21 projections
- Core PDF report w/ analysis & datagraphs PLUS a deep-dive Excel Databook w/ drill-down datasets, market-specific insights & forecasts by global region, country, media sector, platform & channel AND detailed profiles of the Top 20 Global Markets
- 1,500 content marketing agencies, publishers, affiliates & service firms across 80 countries w/ nearly 500 in the US

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Global Content Marketing Forecast 2017™

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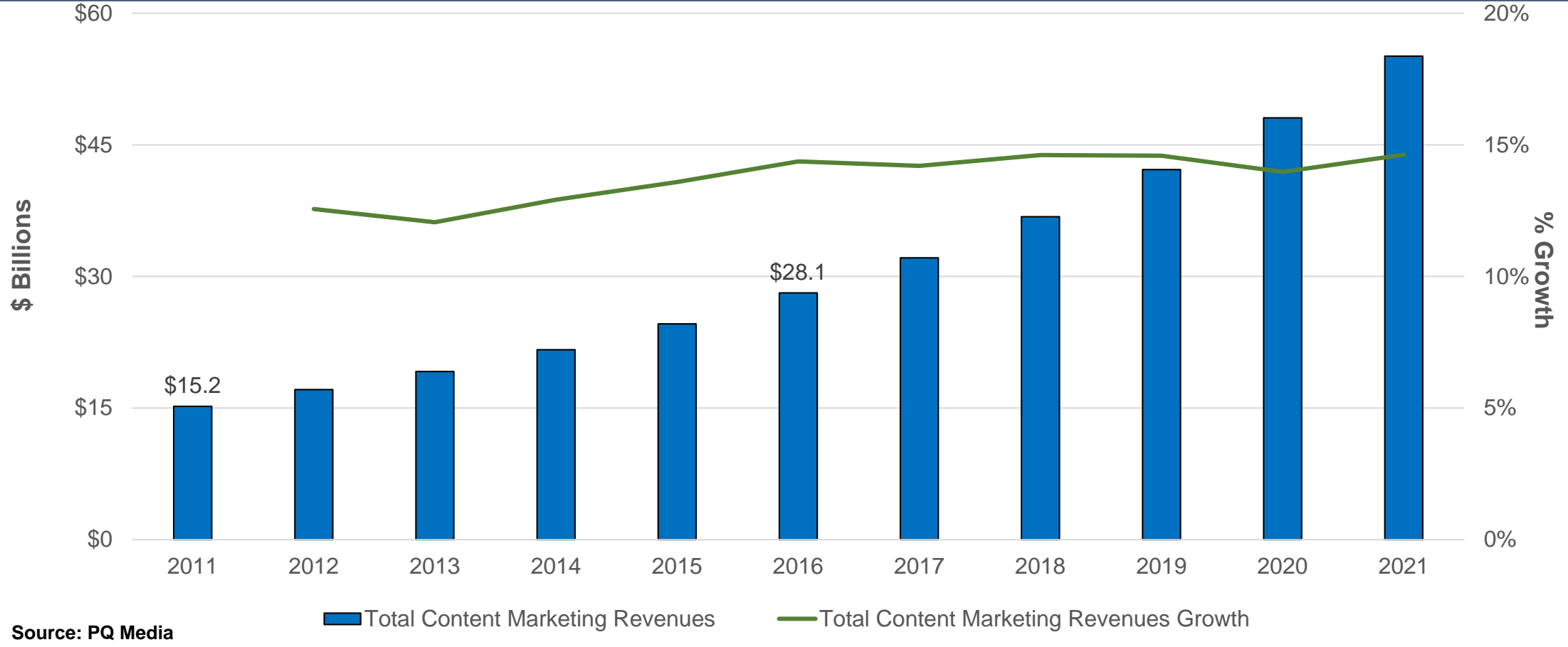
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Global Content Marketing Forecast 2017

Key Takeaways

Global Content Marketing Revenues Rose 14.4% in 2016 to \$28.12 Billion;

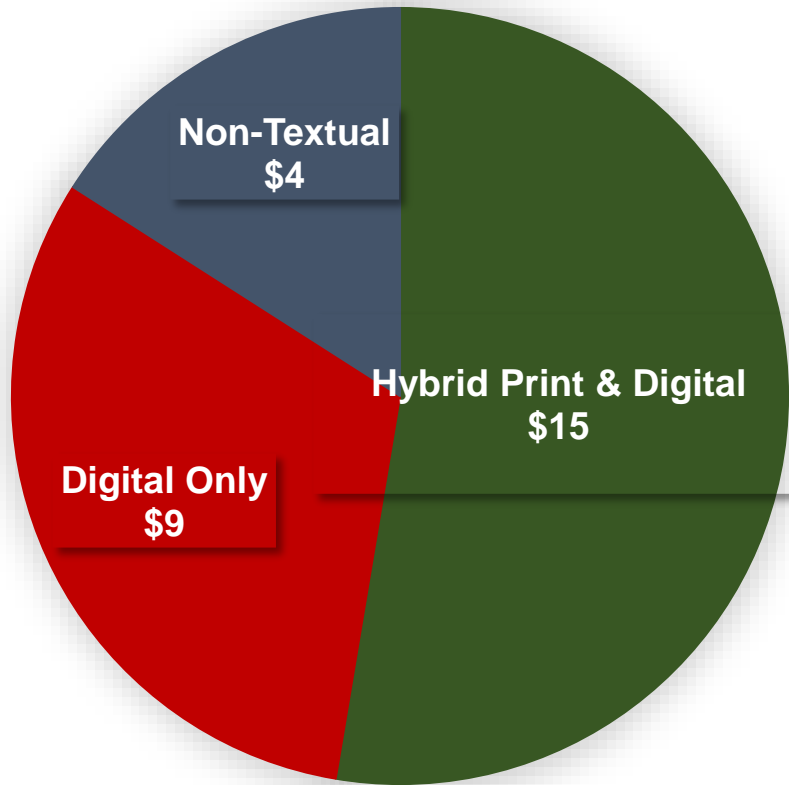
PQ Media's Global Total Content Marketing Revenues & Growth, 2011-2021



Hybrid Print & Digital Largest Content Marketing Category Globally at \$14.81B; In 2016, 52.3% of Content Marketing Aimed at Business-to-Business End Users

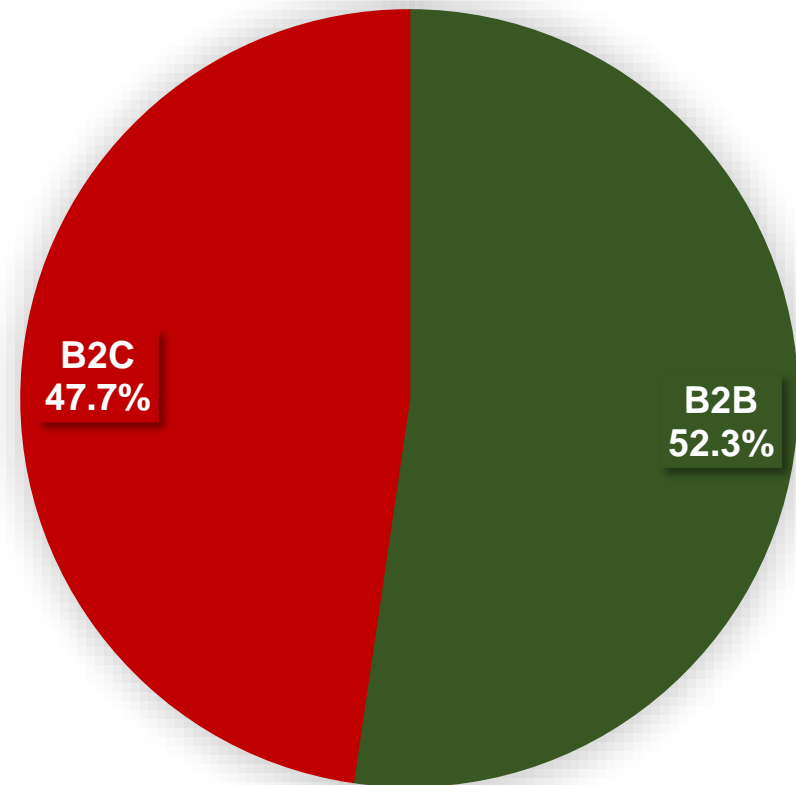
Share of Content Marketing by Platform in 2016

\$ Billions



Source: PQ Media

Share of Content Marketing by End User Sector in 2016



Source: PQ Media

US Largest Content Marketing Market in 2016, Ranked 16th in Growth; South Korea Fastest Growing of the 20 Leading Markets

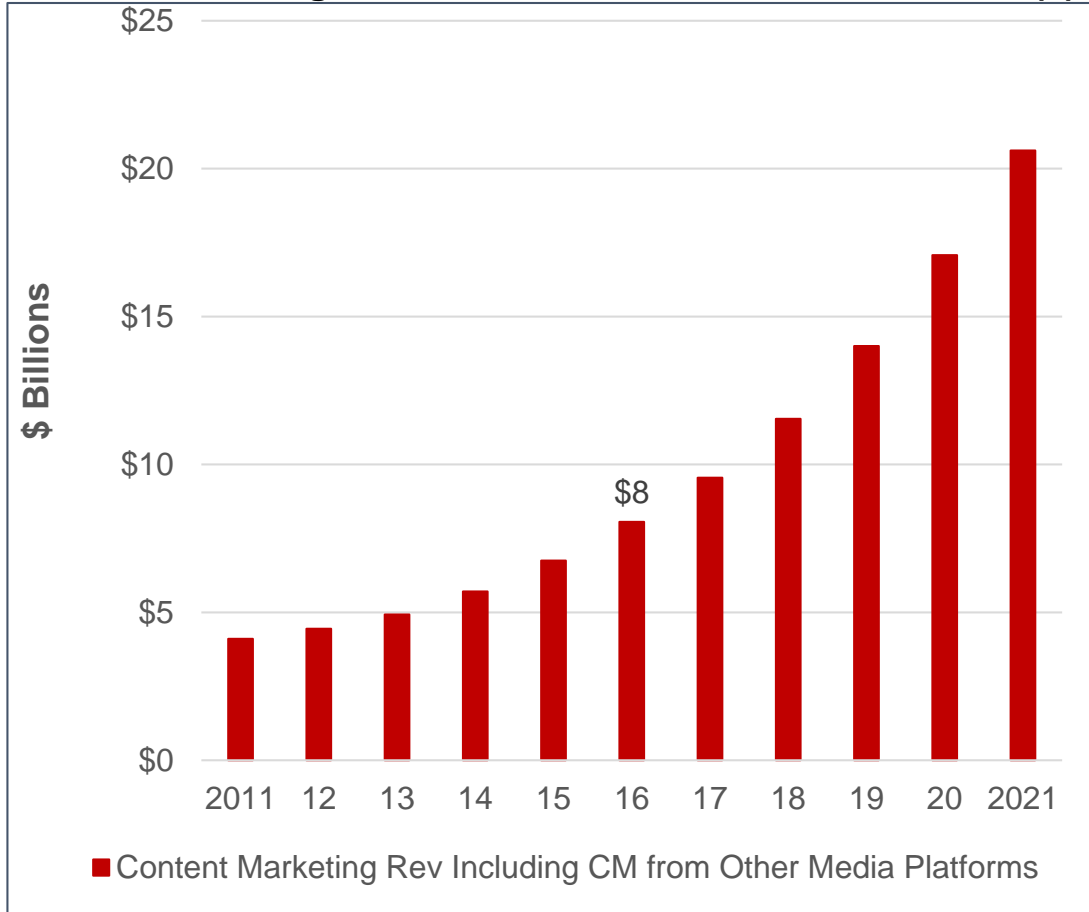
Pure-Play Content Marketing*	
2016 Revenues	2016 vs. 2015 Growth
United States	South Korea
Germany	Brazil
Japan	Argentina
United Kingdom	Canada
France	China

Source: PQ Media

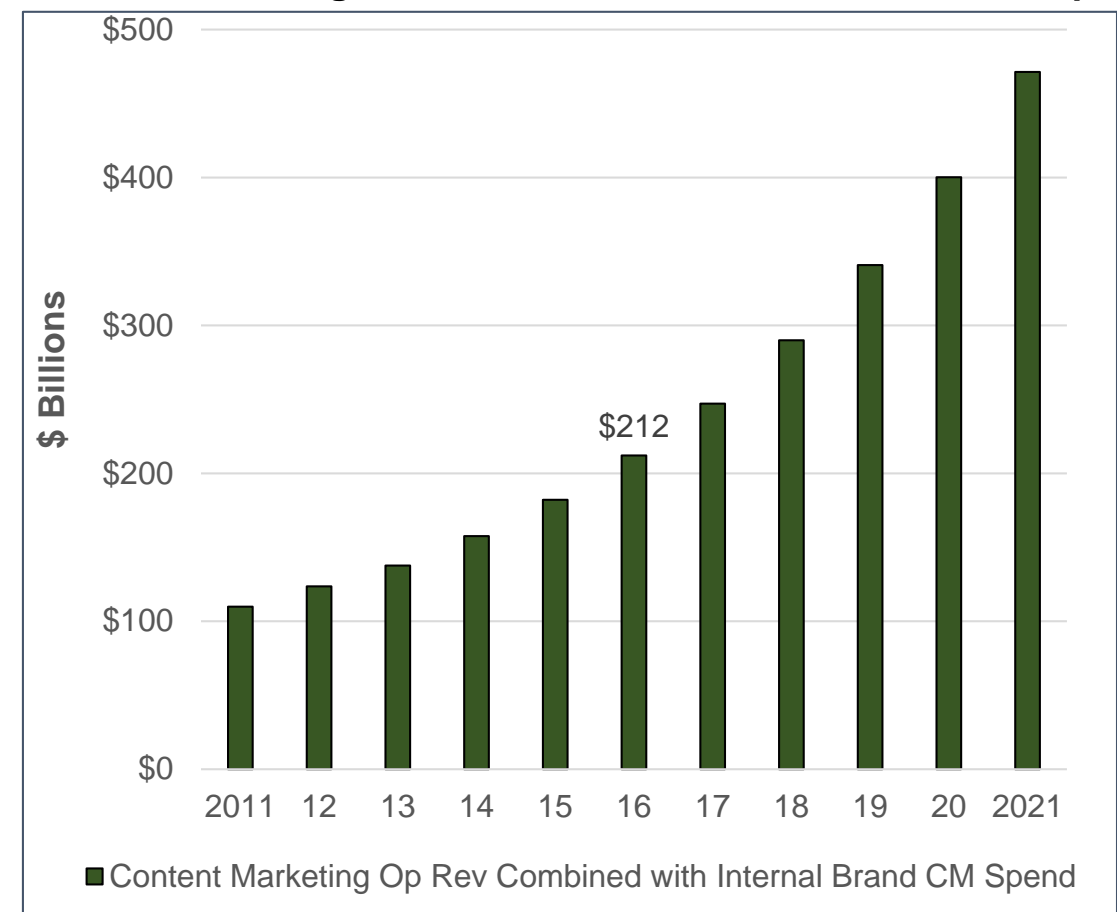
*Revenues generated by companies that specialize in content marketing versus firms offering content marketing services and internal brand spending on content marketing

If CM from Other Media Included, Total Content Marketing Revs Reached \$36.19B in 2016; If Internal Brand Spend on CM Included with CM Revs, Global Content Marketing at \$212.20B

Content Marketing Rev Included in Other Media Platforms (a)



Content Marketing Rev Combined with Internal Brand CM Spend



Source: PQ Media

a) B2B Live Events, Consumer Event Marketing, Digital Video Advertising, E-Mail Marketing, Marketing Information, Product Placement, Public Relations, Social Media Marketing, Videogame Advertising

Global Content Marketing Forecast 2017

Segmentation, Definitions & Examples

PQ Media's Content Marketing Segmentation Rational

- In the first edition of the *Global Content Marketing Forecast Series™* published in 2015, PQ Media provided a brief history on the research of the content marketing industry, exclusively on the US market, which showed that executives from our firm have been involved in the analysis of the content marketing industry from the beginning when the first sizing of the market was published in 1997, at the time called custom publishing, as well as follow-ups in 2001 and from 2005 to 2012.
- The data released in 1997 and 2001 were limited to the overall size of the industry and had no channel category breakdowns. In 2005, the newly formed Custom Publishing Council (CPC) defined the industry by four channel categories, of which three were related to print products. Reports written by PQ Media during the 2005-10 period expanded to include these four channel categories. In 2007, the CPC developed *Content*, a magazine devoted to the industry, and it concurrently included annual articles on the size of the industry that included the PQ Media analysis. In 2011, the CPC was rebranded as the Custom Content Council (CCC) and it added an additional channel category related to digital products, which PQ Media added to its analysis in 2011 and 2012. PQ Media did not publish any data on custom content in 2013, but it was the final year that *Content* published any data on the US market.
- In 2014, the Content Marketing Institute (CMI) released the first taxonomy on content marketing, no long custom content, that included 23 channel categories. Its list included products never before defined as custom content, such as branded research reports, webinars, guest postings, games and seminars. However, when the CMI released its segmentation, no attempt was made to size the various channels until PQ Media published its first global report in 2015. 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 the 13 combined categories follows, as well as definitions & examples of each. Furthermore, we also found that many of the channels had common characteristics, so we combined numerous channel categories into three media platforms: hybrid print and digital content marketing, digital-only content marketing, and non-textual content marketing.

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 makes a distinction between content marketing operating revenues and internal brand spending. Content marketing **revenues** are specific to monies generated by companies that specialize in content marketing (known as pure-plays) that are outsourced by brands to develop and distribute their content marketing campaigns, such as McMurray/TMG and dedicated divisions within agencies, such as Ogilvy Entertainment. In order for content marketing to be compared with other media platforms, such as television, this is the primary data used in the tables and charts of this report. For example, when the size of TV advertising is analyzed by Wall Street firms, it does not include the cost of producing commercials, rather it is limited to the advertising revenues generated by TV networks and stations.
- Content marketing internal brand **spending** includes 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 sponsored 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 was included in the 2015 report because it replicated data in the marketplace from *Content*, and therefore PQ Media wanted to remain consistent with previous data published on content marketing. Furthermore, PQ Media found that it is a common practice for brands to have internal departments that prepare marketing materials across various media platforms, such as experiential, influencer, promotional, relationship, and retailer marketing, as shown in the *PQ Media US Brand Activation Marketing Forecast Series™*, done in collaboration with the Association of National Advertiser.

Content Marketing Definition (cont.)

- When PQ Media published the *Global Content Marketing Forecast 2015-19*, our analysis included all data for every category channel defined by the CMI. However, in preparing the 2016 edition of the *PQ Media Global Advertising & Marketing Forecast*, we discovered that we double-counted some data. That is, the CMI taxonomy had products that PQ Media already includes as data in other media platforms. For example, the CMI includes annual reports as custom content, but PQ Media covers this service in its analysis of public relations. As a result, we have extracted data from the 2015 content marketing report that we believe were included in other media platforms to avoid double counting. There are subscribers, however, who request this subtotal of overall revenue data, so we've included new data sets in the 2017 report that combine the revenues from pure-play content marketing firms referenced on the previous page with revenues generated by firms that specialize in other media platforms, but provide content marketing services.
- The media platforms effected include: business-to-business live events, consumer event marketing, digital video advertising, e-mail marketing, marketing information, product placement, public relations, social media marketing, videogame advertising, and word-of-mouth marketing.

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 as a stand-alone product for 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.

Examples of Digital Only Content Marketing

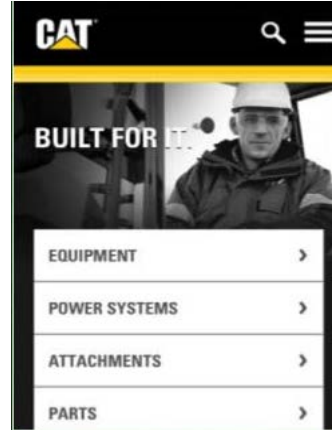
Guest Posting



Online Article



Mobile Content



Blog



Podcast



Infographic



Microsite



Online Presentation



Webinar



Case Study



Mobile App



Source: Content Marketing Institute's *Content Marketing Playbook: 24 Epic Ideas for Connecting with Your Customers*

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 as 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.

Examples of Hybrid Print & Digital Content Marketing

Print Book



Print Magazine



Print Newsletter



Annual Report



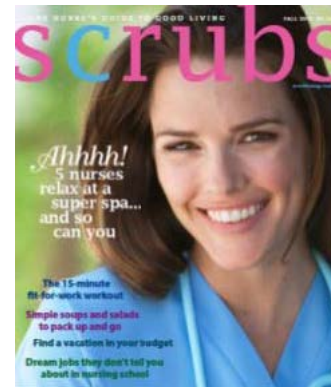
Research Report



E-Book



Digital Magazine



E-Newsletter



White Paper



Source: Content Marketing Institute's *Content Marketing Playbook: 24 Epic Ideas for Connecting with Your Customers*

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.

Examples of Non-Textual Content Marketing

Videos



Branded Content Tools



Games/Gamification



In-Person Events



Source: Content Marketing Institute's *Content Marketing Playbook: 24 Epic Ideas for Connecting with Your Customers*

Select data from this report is also included in PQ Media's annual *Global Media & Technology Forecast Series*, a three-report compendium delivering the first holistic map of the worldwide media economy. The *GMT Series* is organized by global region, country, media sector, platform, channel, technology, and generation, covering more than 100 digital and traditional media channels and providing deep-dive profiles of the Top 20 Global Media Markets, including the US. The findings are comprehensive, in-depth, data-rich, and form the foundation of essential media business intelligence for industry stakeholders. Click on any of the links below to access the dedicated landing pages for each individual report, where you can download free executive summaries and sample datasets from the latest editions of these publications.

[Global Advertising & Marketing Revenue Forecast 2016-20.](#)

[Global Consumer Media Usage & Exposure Forecast 2016-20.](#)

[Global Consumer Spending on Media & Technology Forecast 2016-20.](#)



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 free phone consult, please contact CEO Patrick Quinn at pquinn@pqmedia.com or EVP Leo Kivijarv, PhD, at lkivijarv@pqmedia.com or call them at 203-569-9449.

Global Advertising & Marketing Forecast 2016-20

4th Edition of the Global Advertising & Marketing Media Industry's Annual Performance Benchmark

- 1st Report of 3 in the *Global Media & Technology Series 2016-20*

Advertising Media *Broadcast TV *Directories *Entertainment Media *Internet & Mobile *Magazines *Newspapers *Out-of-Home Media *Pay Television *Radio	Marketing Media *Branded Entertainment *Event Marketing *Content Marketing *Online & Mobile *Direct Marketing *Social Media *Product Placement *Promotions *Public Relations		Top 20 Global Markets *United States *Japan *Argentina *Mexico *Australia *Netherlands *Brazil *Poland *Canada *Russia *China *South Africa *France *South Korea *Germany *Spain *India *Taiwan *Italy *United Kingdom
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- Credible, consistent, actionable advertising & marketing media intelligence covering 2010-20 period with 2016 estimates and 2016-20 forecasts
- Only primary source delivering data & analyses tracking all digital & traditional advertising & marketing platforms worldwide
- Exclusive industry revenue & growth data, insights & projections by country, media sector, platform, channel
- Original industry definitions, segmentation, market sizing, growth projections, key growth drivers, market trends & emerging challenges

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Global Consumer Media Usage & Exposure Forecast 2016-20

4th Edition in PQ Media's Global Media & Technology Series, the Industry's Worldwide Performance Benchmark Since 2013

Report 2 of 3 in Series

Digital Media *Internet Media *Mobile Media *Other Digital Media Traditional Media *Live Television *Physical Film & Video *Physical Recorded Music *Print Books & Directories *Print News & Information *Print Periodicals & Serials *Terrestrial Radio *Traditional OOH	Demo Breakouts *Gender *Generations *J-Gen *Millennials *GenY *Boomers *Great Gen		Top 20 Global Markets *United States *Japan *Argentina *Mexico *Australia *Netherlands *Brazil *Poland *Canada *Russia *China *South Africa *France *South Korea *Germany *Spain *India *Taiwan *Italy *United Kingdom
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- Most credible, consistent & actionable media consumption intelligence covering 2010-20 period, with 2015 actuals, 2016 pacing, 2016-20 forecasts
- Only primary source delivering data & analyses tracking all consumer media usage by platform worldwide
- Exclusive data, insights & projections by digital & traditional sectors, platforms, digital channels and shift from traditional to digital media
- Original industry definitions & segmentation, current market sizing & growth projections, key growth drivers & emerging challenges

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Global Consumer Spending on Media Content & Technology Forecast 2016-20

4th Edition in PQ Media's Global Media & Technology Series, the Industry's Worldwide Performance Benchmark Since 2013

Report 3 of 3 in Series

Digital Media *Content *Unit Purchases *Subscriptions *Technology *Access *Devices *Software & Services	Traditional Media *Content *Unit Purchases *Subscriptions *Technology *Access *Devices		Top 20 Global Markets *United States *Japan *Argentina *Mexico *Australia *Netherlands *Brazil *Poland *Canada *Russia *China *South Africa *France *South Korea *Germany *Spain *India *Taiwan *Italy *United Kingdom
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- Most credible, consistent & actionable consumer spend on media & tech intelligence covering 2010-20 period, with 2015 actuals, 2016 pacing, 2016-20 forecasts
- Only primary source delivering data & analyses tracking all consumer media content & technology platforms worldwide
- Exclusive data, insights & projections by consumer media spend sectors, platforms, content & technology categories and shift from traditional to digital media
- Original industry definitions & segmentation, current market sizing & growth projections, key growth drivers & emerging challenges

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