



DIGITAL BRANDED CONTENT UNCOVERED



INSIGHT REPORT

What is the state of play in premium publisher branded content?

How have brands and publishers risen to the coronavirus challenge?



TABLE OF CONTENTS

03 INTRODUCTION

04 DEFINING BRANDED CONTENT

05 THE RATIONALE FOR
BRANDED CONTENT

06 CONTEXT IS QUEEN

07 MARKET OVERVIEW

08 CAMPAIGN TYPES &
CONTENT FORMATS

10 CONTENT THEMES

11 CONTENT TONE

12 CONTENT ARCHETYPES

13 BRANDING

14 MARKETING OBJECTIVES

15 IDENTIFYING
BRANDED CONTENT

16 CAMPAIGN RELATIONS


18 COPING WITH COVID

19 KEY TAKEAWAYS

20 ABOUT BC INTEL

21 ABOUT DM SQUARED

INTRODUCTION

 **Digital Branded Content Uncovered** is a first-of-its-kind insight report from DM Squared that shines a light on one of the most vibrant and creative but least researched sectors of the marketing industry.

The onset of the global COVID-19 pandemic four months into this report's analysis period adds an extra layer of analysis and perspective that serves to underline the resilience, relevance and adaptability of branded content.

ABOUT THIS REPORT

Based upon an analysis of data from DM Squared's **BC Intel** service, the report quantifies the key dimensions of the digital branded content market and uses innovative content analytics to provide fresh insight into the art and science of this particular field of content marketing.

BC Intel identifies, measures and analyses digital branded content across premium English-language publishers. More information about the service is available [here](#).



ANALYSIS PERIOD

December 2019 - November 2020 (unless otherwise specified)

PUBLISHER COVERAGE

135 US + UK digital publishers*

BRAND COVERAGE

3,500 brands from 32 sectors and 268 sub-sectors

CONTENT VOLUME

13,500 content items** across >5000 campaigns

**This report covers publisher-hosted branded content across 18 publisher genres and excludes the promotion of branded content via social media (to be covered in future reports).*

***Content items consist of advertising features, branded articles, branded videos and editorial sponsorships. More info on content types [here](#)*

PUBLISHER GENRES

Business & Finance

Current Affairs

Entertainment

Factual / Natural World

Fashion & Beauty

Food & Drink

Health & Wellness

House & Home

Lifestyle - Women's

Luxury Lifestyle

Men's Fashion & Style

Music & Popular Culture

News

Parenting

Science & Tech

Sport

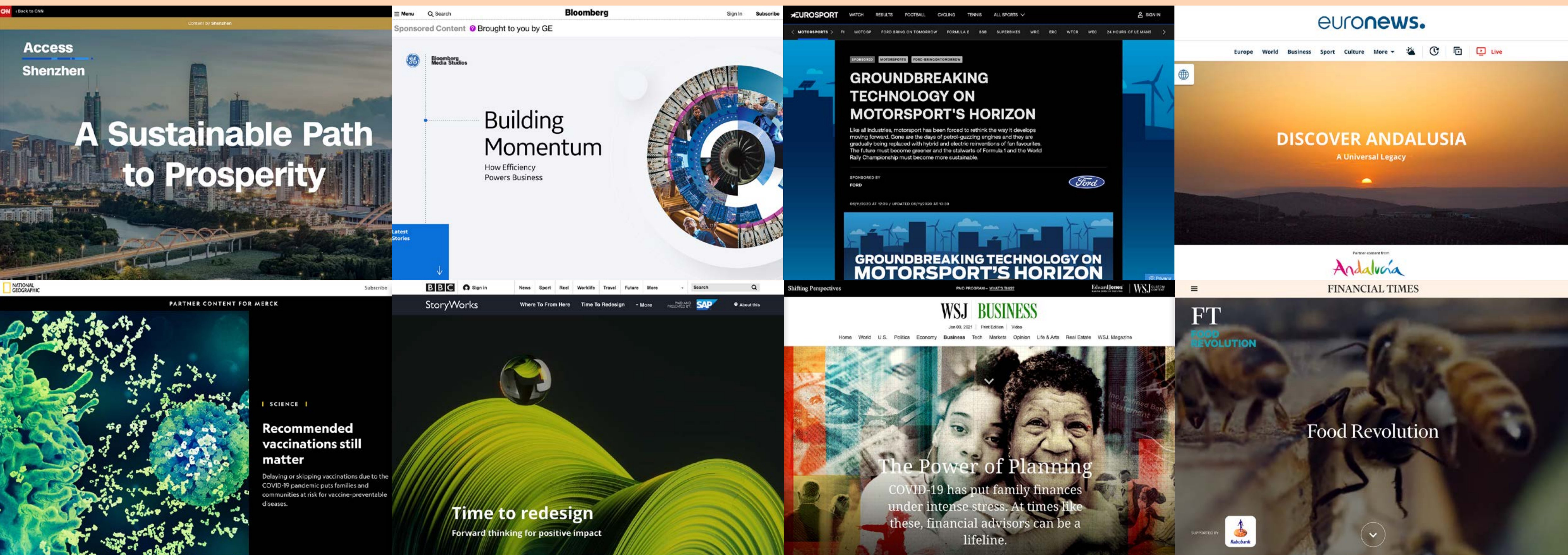
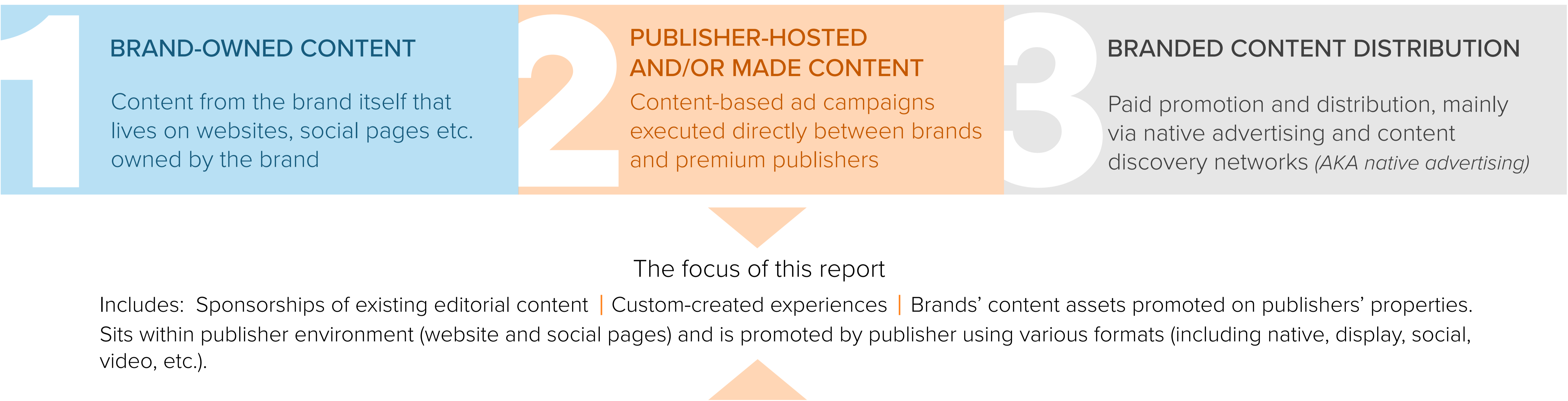
Travel

Viral Content

DEFINING BRANDED CONTENT

Branded content is an unhelpfully broad term, often used interchangeably with ‘native advertising’, ‘sponsored content’ and ‘content marketing’ and can therefore mean different things to different people. The IAB’s (Interactive Advertising Bureau) definitions framework brings clarity and pinpoints the focus of this report.

THE IAB DEFINITIONS FRAMEWORK



THE ESSENCE OF BRANDED CONTENT

(publisher-hosted and/or made branded content)

- Content that **ENRICHES** and is of value to audiences
- Weaving together the **FACTS**, **EMOTIONS**, **IDEAS** and **VALUES** that a brand evokes
- TELLING STORIES** that people can relate to and engage with
- Not only building **AWARENESS**: also driving **CONSIDERATION**, triggering **ENGAGEMENT** and sparking **CONVERSATIONS** about brands



CONTINUED GROWTH

The global publisher branded content market has been outgrowing overall digital ad spend by a factor of 2.5X for the last 5 years and, prior to the events of 2020, was reportedly growing at an average rate of 40% year-on-year*.

Despite a 28% drop in campaign volumes due to the COVID-19 crisis in the darkest month of April 2020 (compared to January), and a challenging publisher revenue situation for much of the year, digital branded content's swift recovery and Q4 volume highs suggest that its longer-term growth trajectory will resume.

**2016-2019, Source: Polar*

STRONG FUNDAMENTALS

Underpinning this growth is the fact that branded content remains one of the advertising industry's best answers to...



Ever-growing consumer **privacy** concerns and government **regulation**

Branded content sits at the opposite end of the scale to the interruptive advertising model.

It does not fully rely on programmatic, cookie-based targeting.

Through storytelling, it connects with audiences on a deeper level, builds trust, creates lasting relationships, drives brand engagement and turns brands into experiences.

Increasing advertiser demands for **brand safety**, and **transparency**



Premium publishers' properties are safe havens for brands and ad blockers are ineffective against branded content.

Advertisers and brands get exactly what they think they are buying: publisher audiences.

Pricing of branded content is evolving toward a more transparent cost-per-view model.

Publisher need to uphold **quality**, maintain editorial **integrity** and **monetize** digital presence



Branded content blends into publisher websites ensuring a level of consistency with editorial content.

Publisher-designed branded content is a high-quality, potentially high-margin business for publishers.

Publishers are well positioned to drive engagement for brands.

EFFECTIVENESS

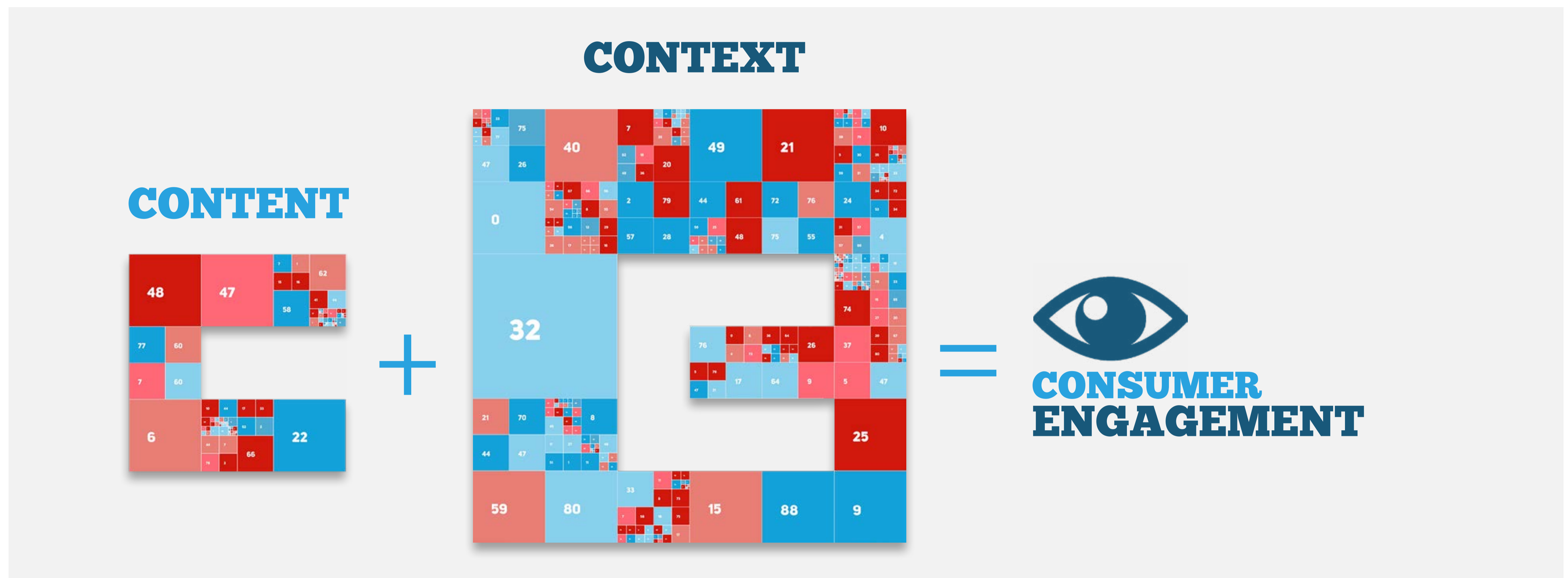
While not the subject of this report, the positive consumer response to branded content is its raison d'être. Numerous studies have shown that brand recall, opinion shift and other brand outcomes are significantly greater for branded content than for display advertising, and that there is a high level of consumer acceptance and appreciation of branded content provided it is clearly labelled as such. (*learn about labelling [here](#)*)



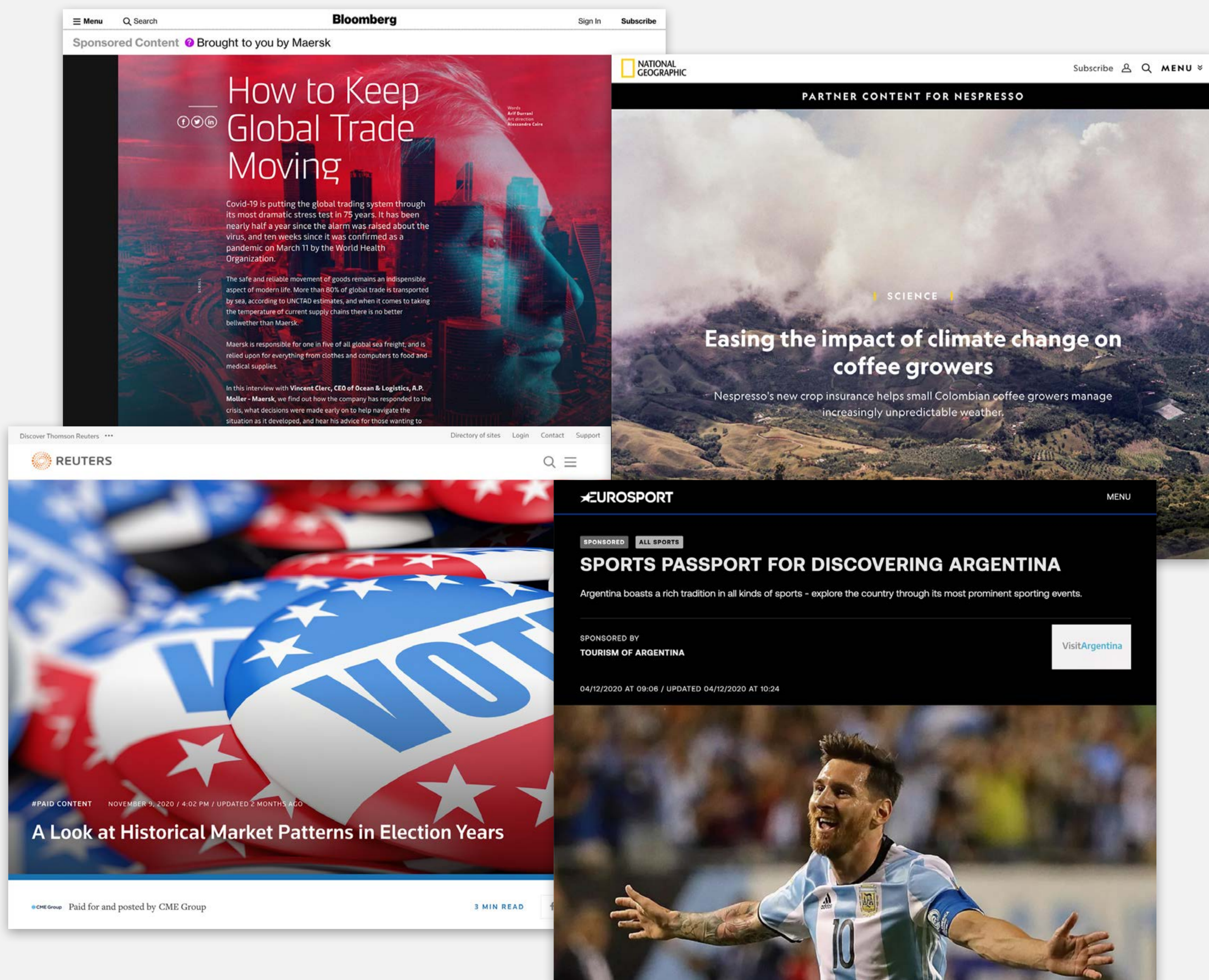
CONTEXT IS QUEEN

CONTENT is KING and CONTEXT is QUEEN

A mantra with a renewed significance in a post-GDPR, post-CCPA* world, with upcoming changes to Apple's Identifier for Advertisers (IDFA) and the probability of third-party cookie-less browsers.



Premium publisher branded content is **CONTEXTUAL BY DESIGN**



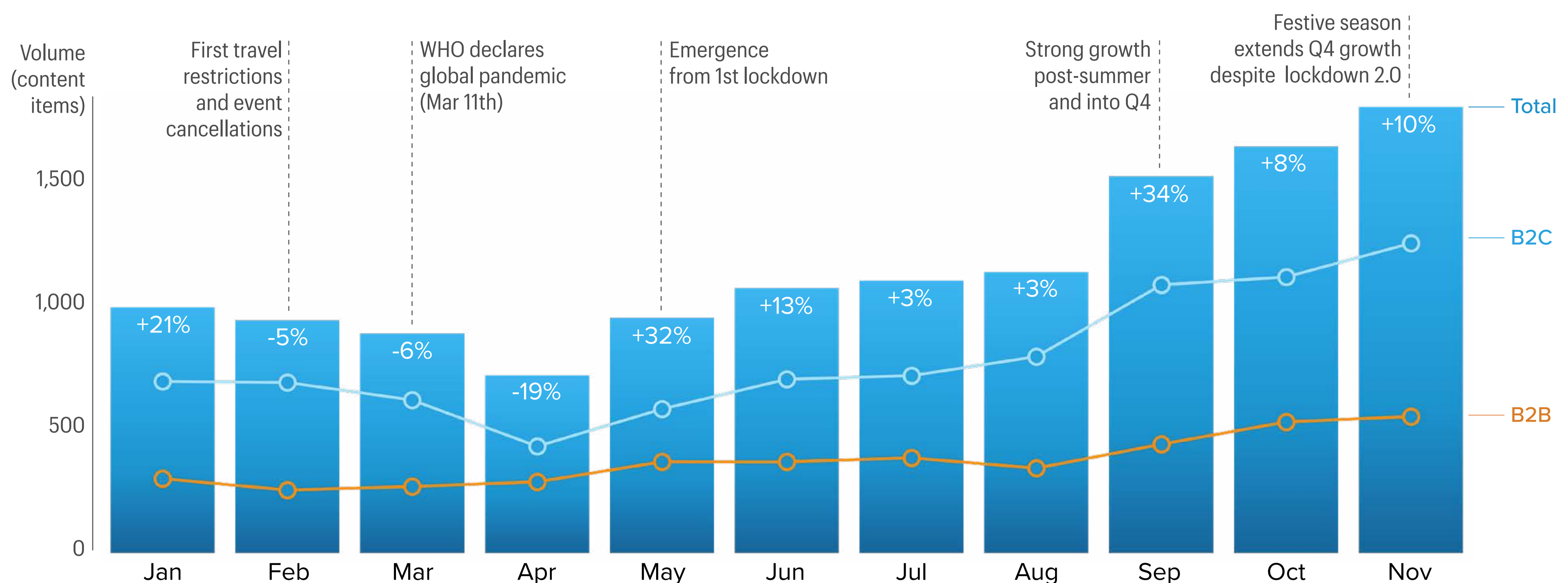
*General Data Protection Regulation in Europe; California Consumer Privacy Act



BRANDED CONTENT MARKET OVERVIEW

VOLUME TREND Jan-Nov 2020

Monitored branded content campaign volume + month-on-month % change



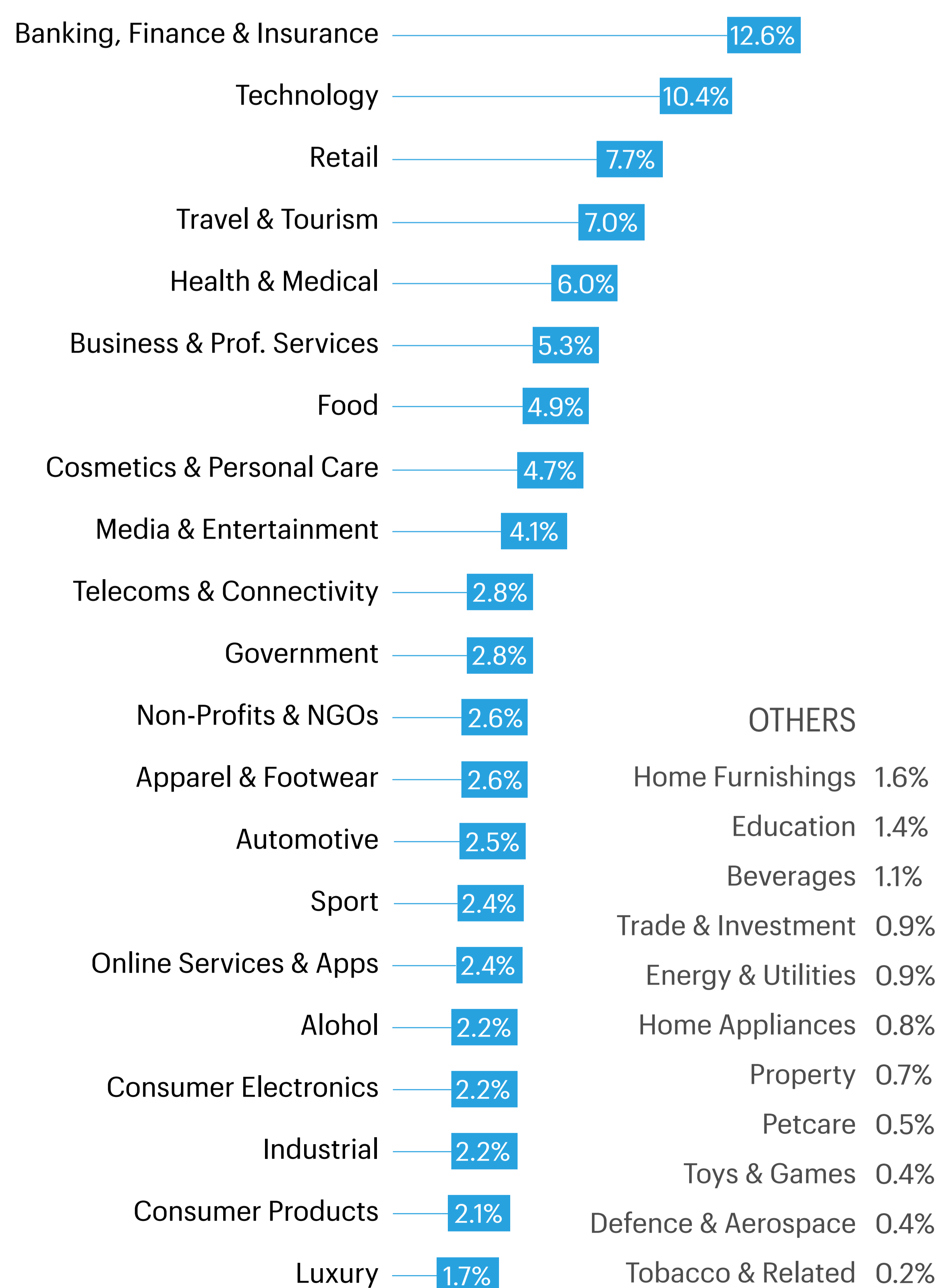
During 2020 branded content campaign volumes have not shown the expected seasonality for obvious reasons. April saw B2C-targeted campaign volumes 38% lower than at the start of the year but the downturn was erased by June and Q4 exceeded expectations.

B2B-targeted campaigns appeared almost immune to the downturn and quickly adapted content and messaging to reflect the radically changed business environment.

Read more about the impact of COVID-19 [here](#).

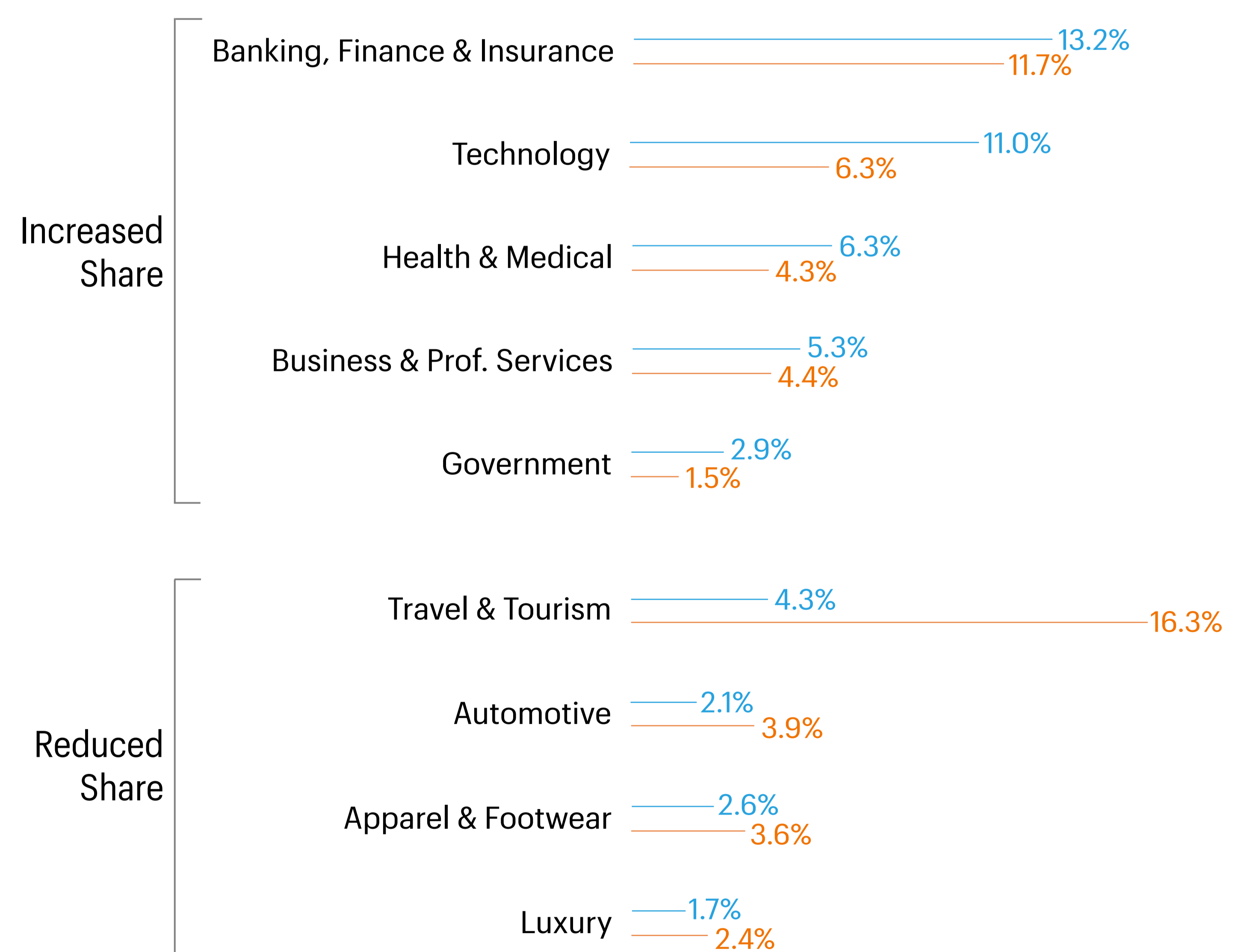
CAMPAIGN VOLUME by SECTOR

(Share of total content volume Dec '19 - Nov '20)



KEY SHIFTS: COVID vs. pre-COVID-19

(share of total content volume pre and post pandemic declaration*)



Pre-COVID, the Travel & Tourism sector was the clear leader in terms of branded content volume. Now its output gives it around a quarter of its former share. Conversely, the tech sector has gained the most compared to the pre-COVID era (75% increase in share).

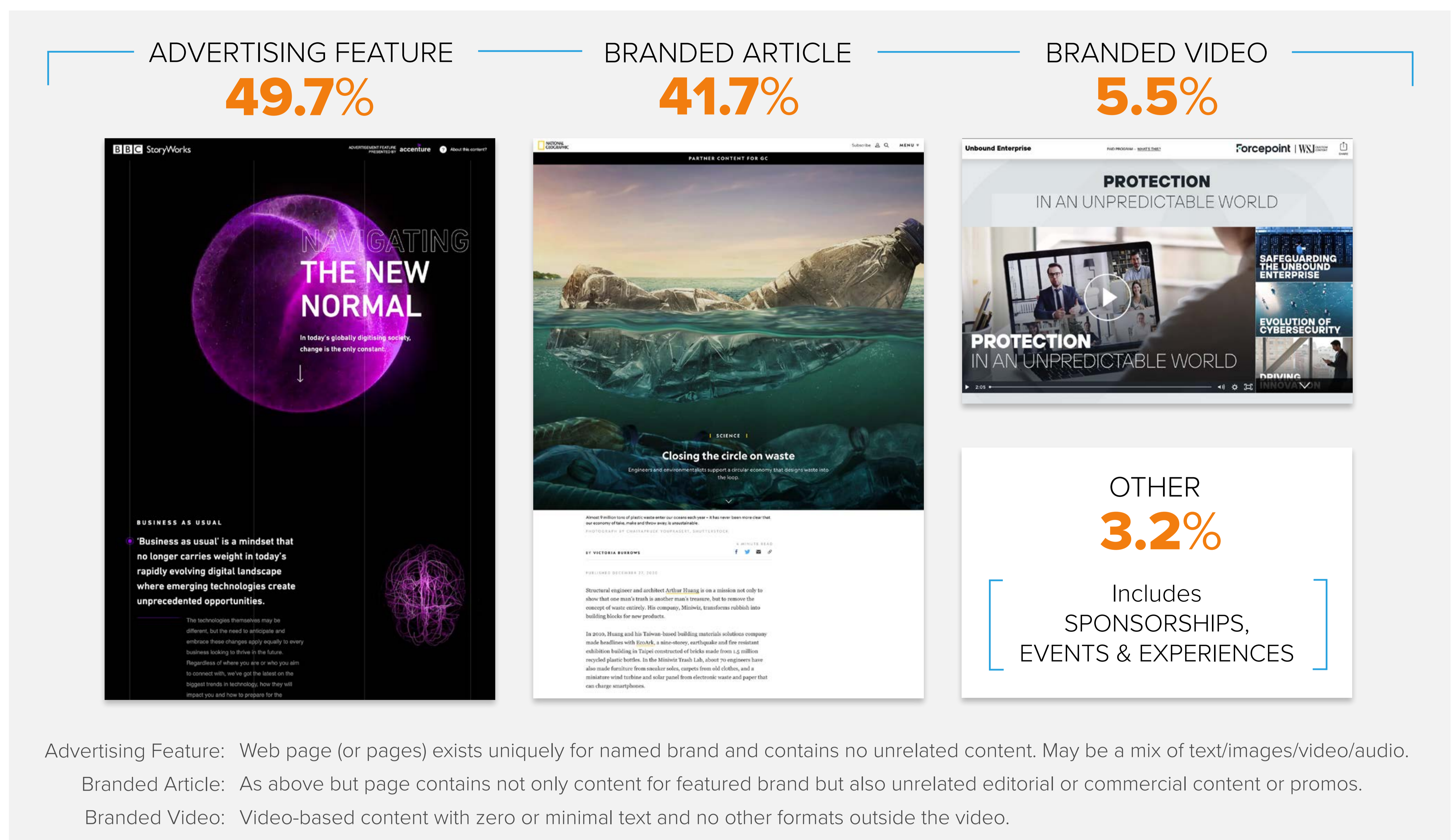
*Pre-COVID-19 defined as Jul 2019 - Mar 10th 2020; COVID defined as Mar 11th - Nov 2020



CAMPAIGN TYPES & CONTENT FORMATS

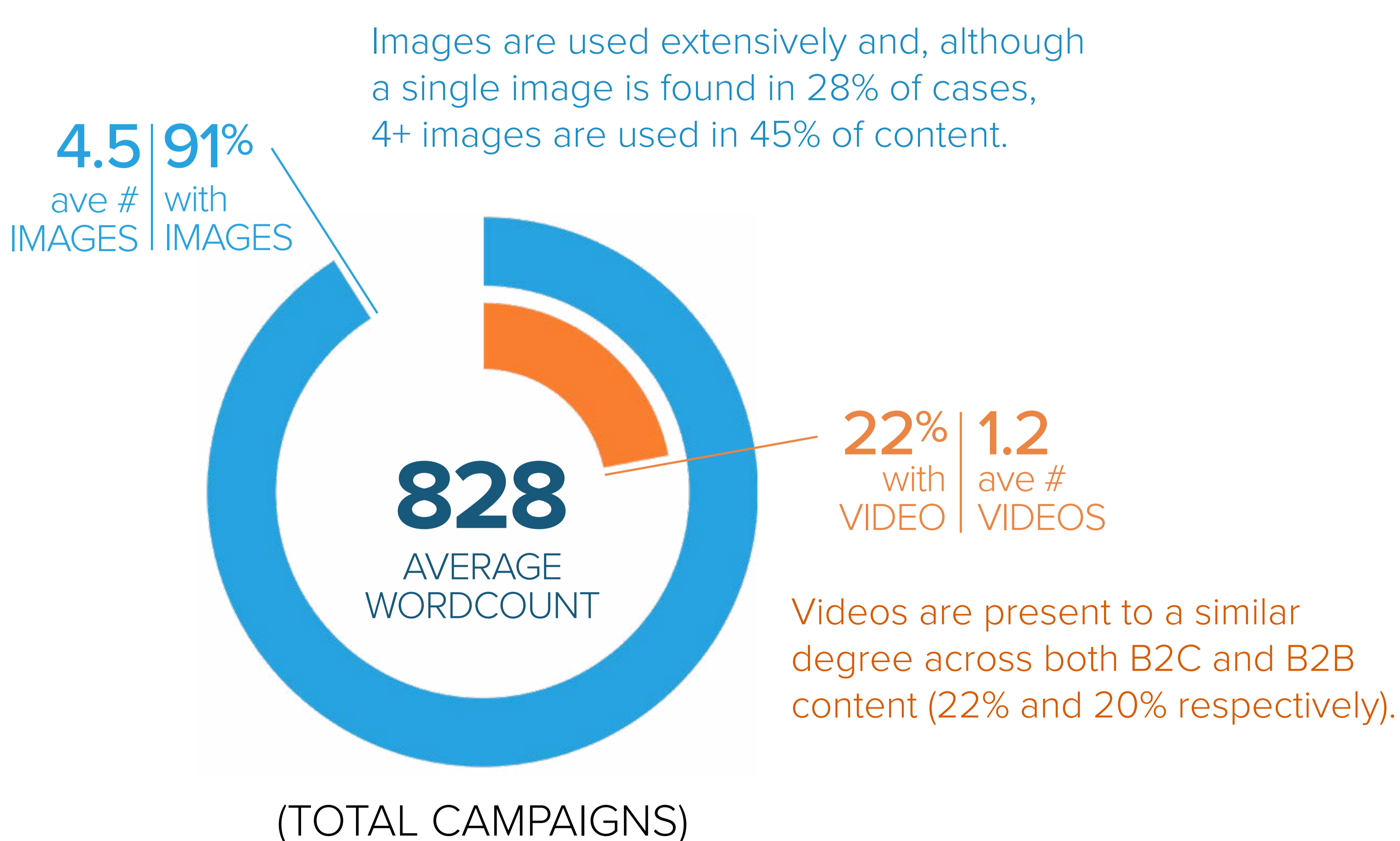
CAMPAIGN TYPES

Premium publishers favor high value, high quality custom studio-made advertising features over other types of branded content. Branded articles are also widely used though the source - studio, editorial or advertiser - is often less clear. Branded video - lower overall - sees much higher levels within specific publisher genres.



TEXT, IMAGES & VIDEO

Beyond text copy, digital branded content engages audiences by making extensive use of the the main format types: images and video and, to a lesser extent, podcasts and audio files*, as well as sub-formats and interactive elements, such as infographics, slideshows and downloadables.



Top 5 **OTHER FORMATS** used by campaign target

- | | |
|------------|---------------------------|
| B2B | 1 INFOGRAPHICS |
| | 2 Q&A / INTERVIEWS |
| | 3 DOWNLOADABLES |
| | 4 ANIMATION |
| | 5 CELEBRITY / INFLUENCER |
| B2C | 1 ECOMMERCE |
| | 2 CELEBRITY / INFLUENCER |
| | 3 GALLERIES / SLIDESHOWS |
| | 4 SOCIAL POSTS (embedded) |
| | 5 ANIMATION |

*Although growing in usage, podcasts or other audio-based content is present in only 2% of total digital branded content.



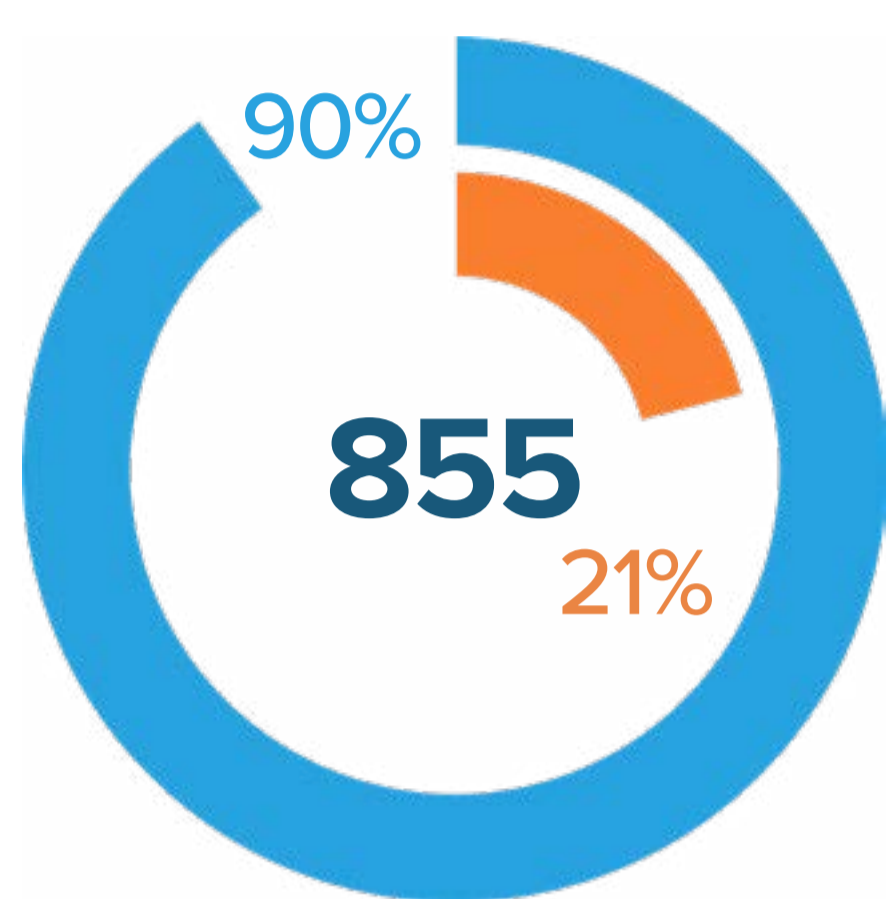
CONTENT FORMATS

TEXT, IMAGES & VIDEO by publisher genre

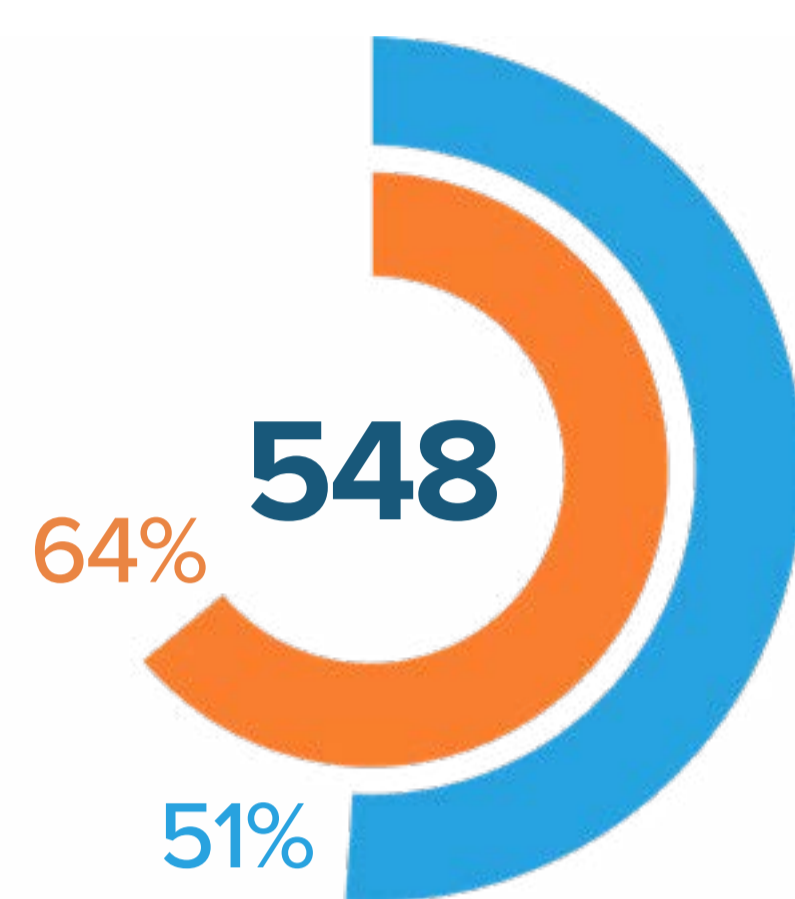
Digital branded content is inherently long-form content (particularly in comparison to display advertising) with average wordcounts close to 1,000 in some publisher genres (Travel, News, Tech and Factual/Natural World). Genres using more video content tend to have lower wordcounts though Men's Fashion & Style is an exception to the rule and takes the prize for brevity.

Campaigns with: ■ IMAGES ■ VIDEO **XXX** Average campaign WORDCOUNT

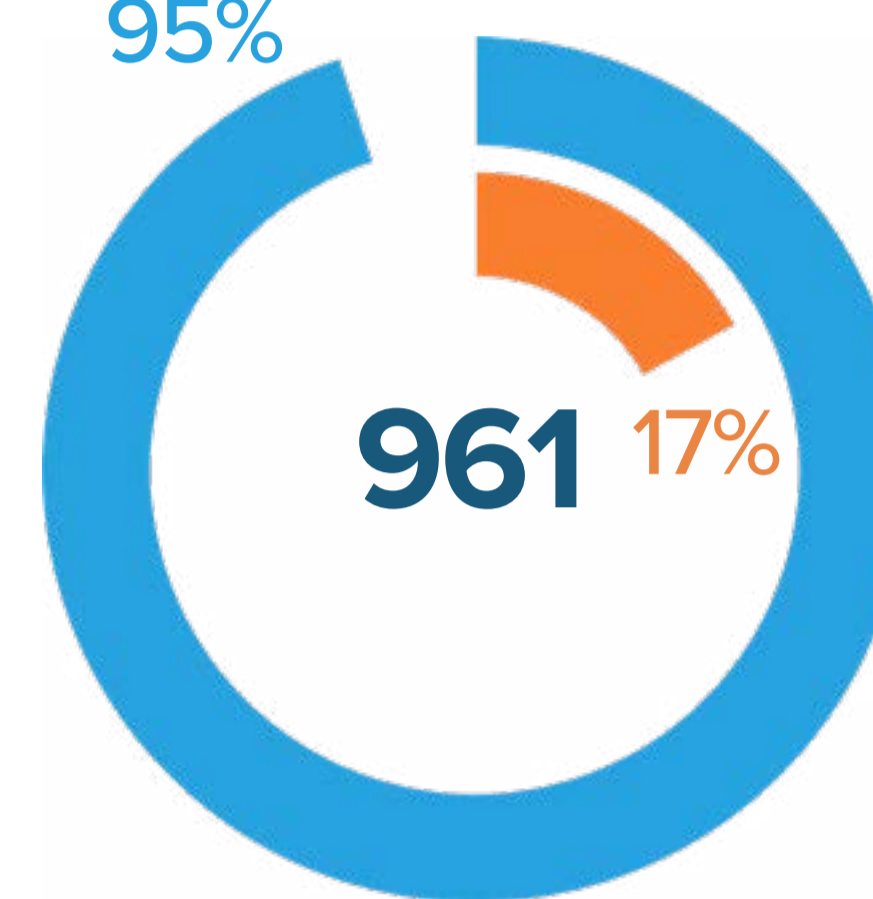
BUSINESS & FINANCE



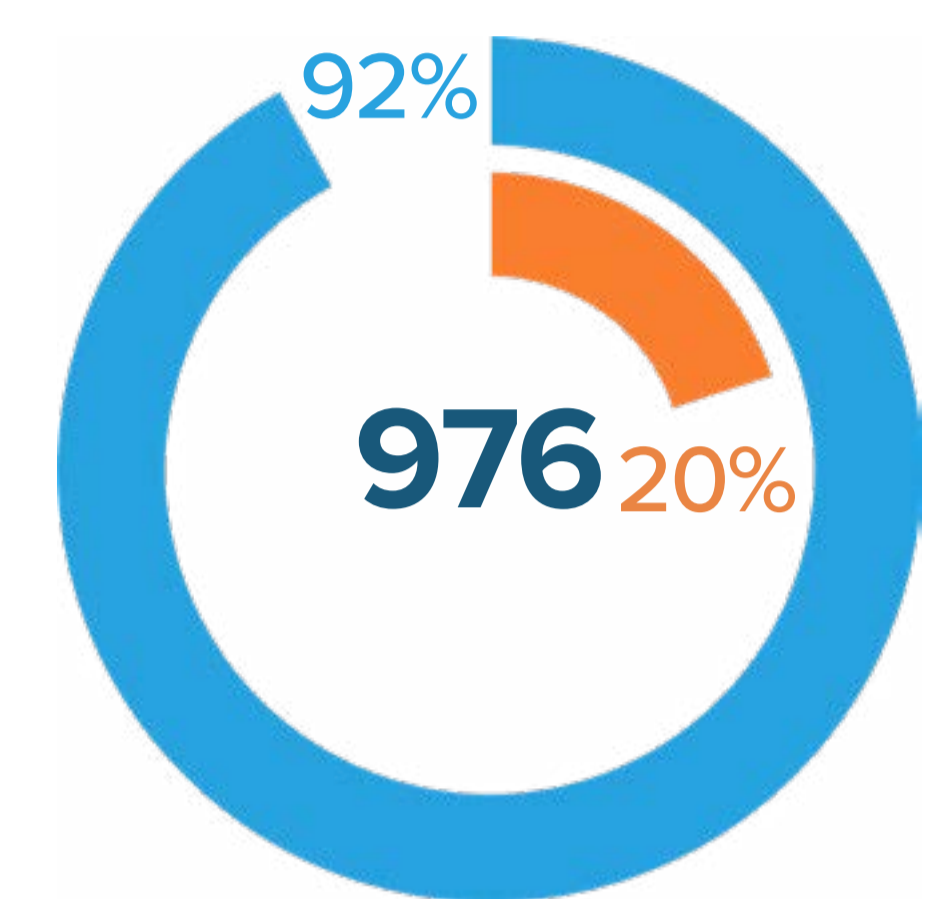
FOOD & DRINK



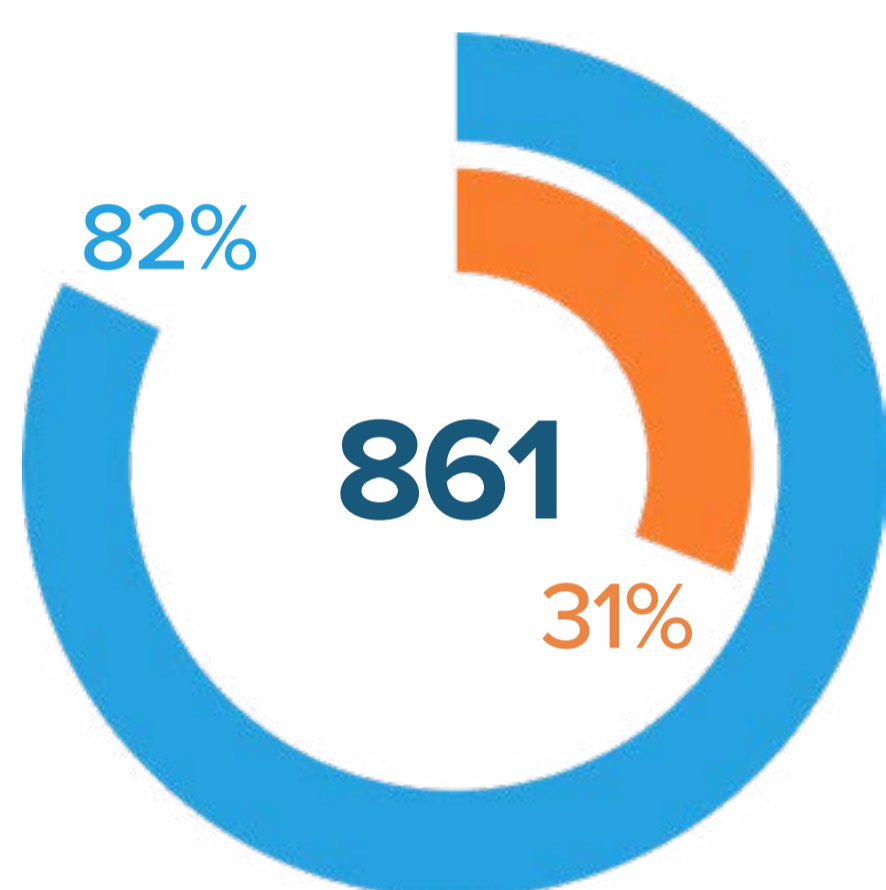
NEWS



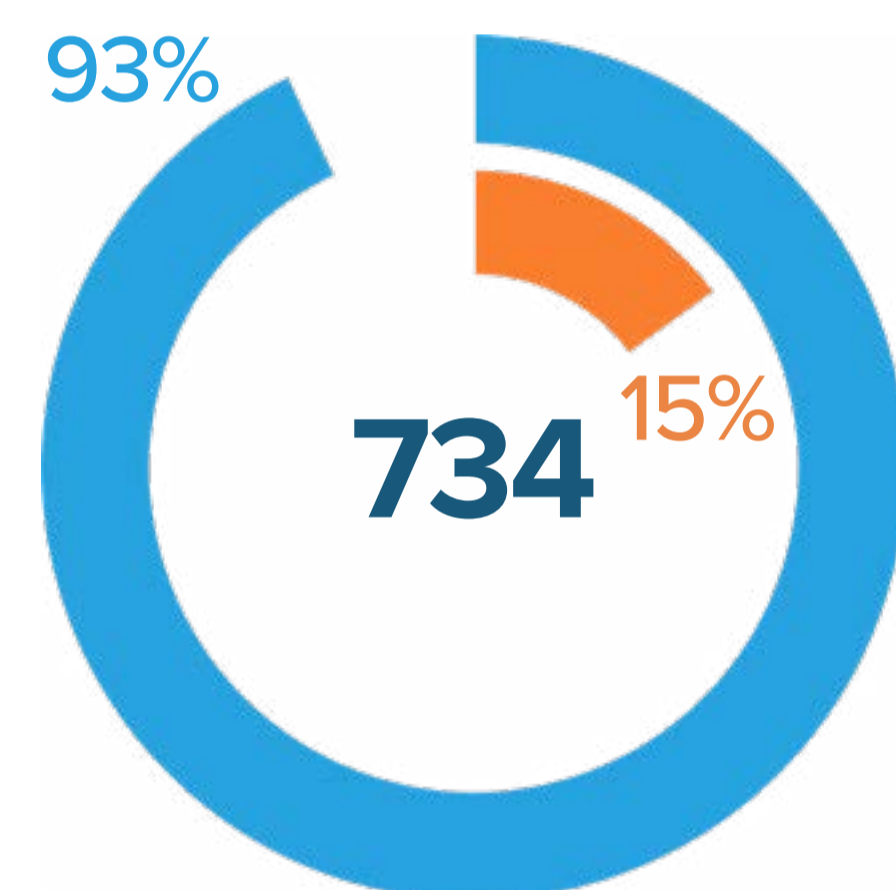
TRAVEL



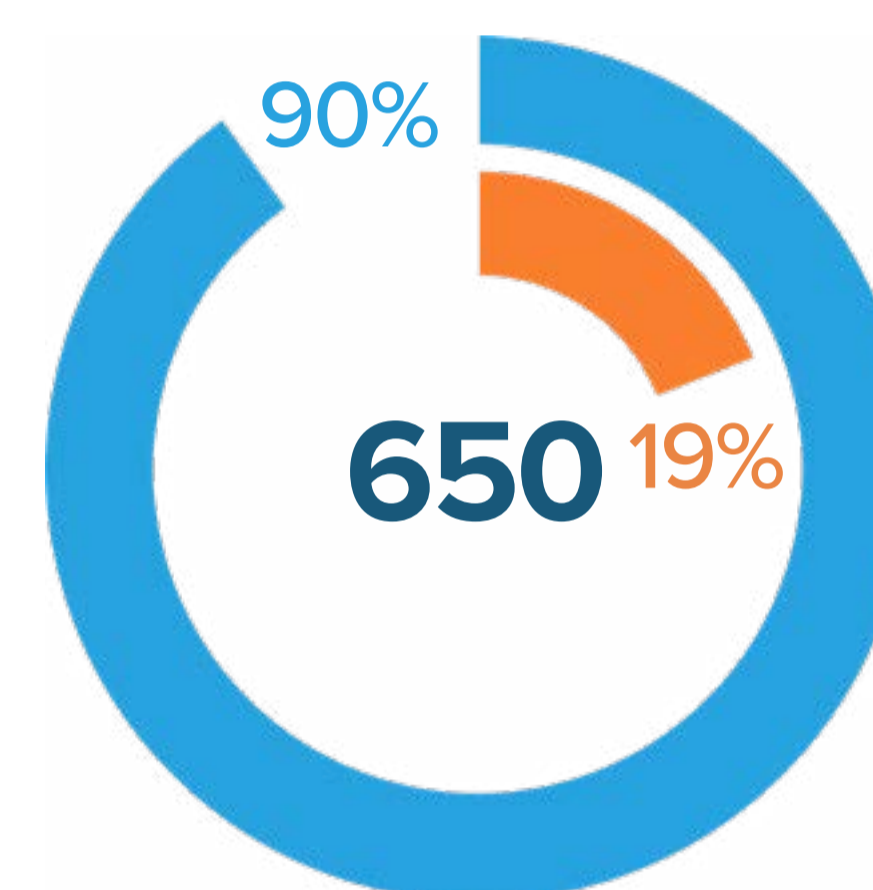
CURRENT AFFAIRS



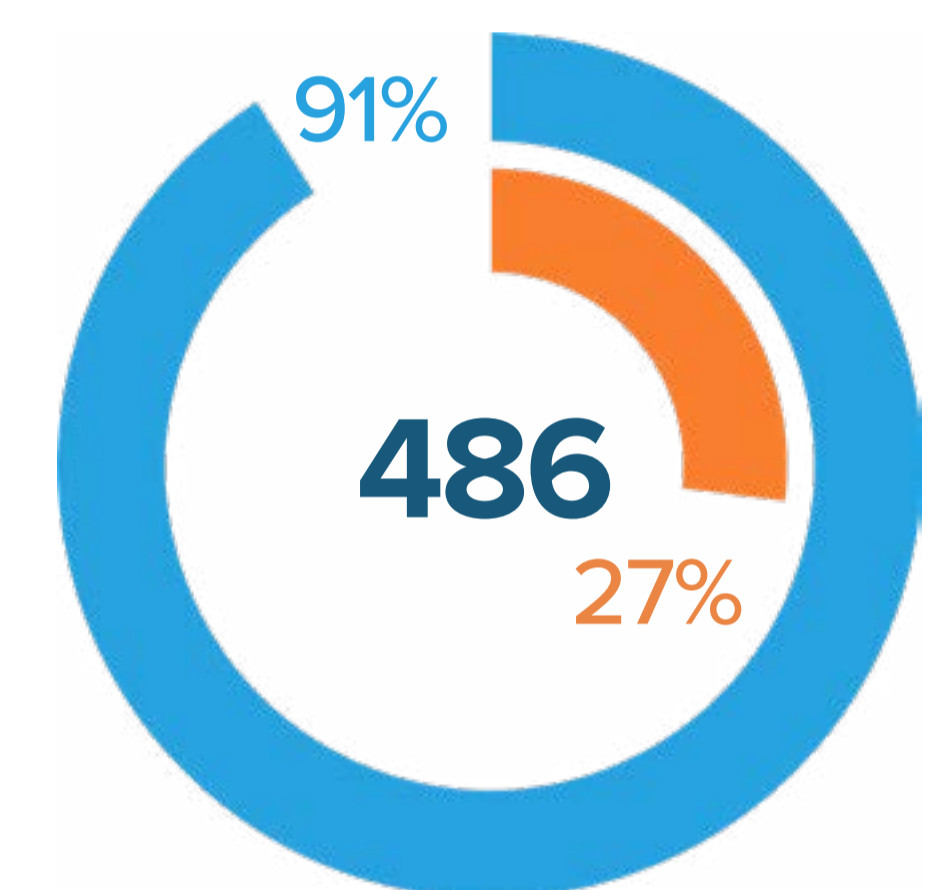
HEALTH & WELLNESS



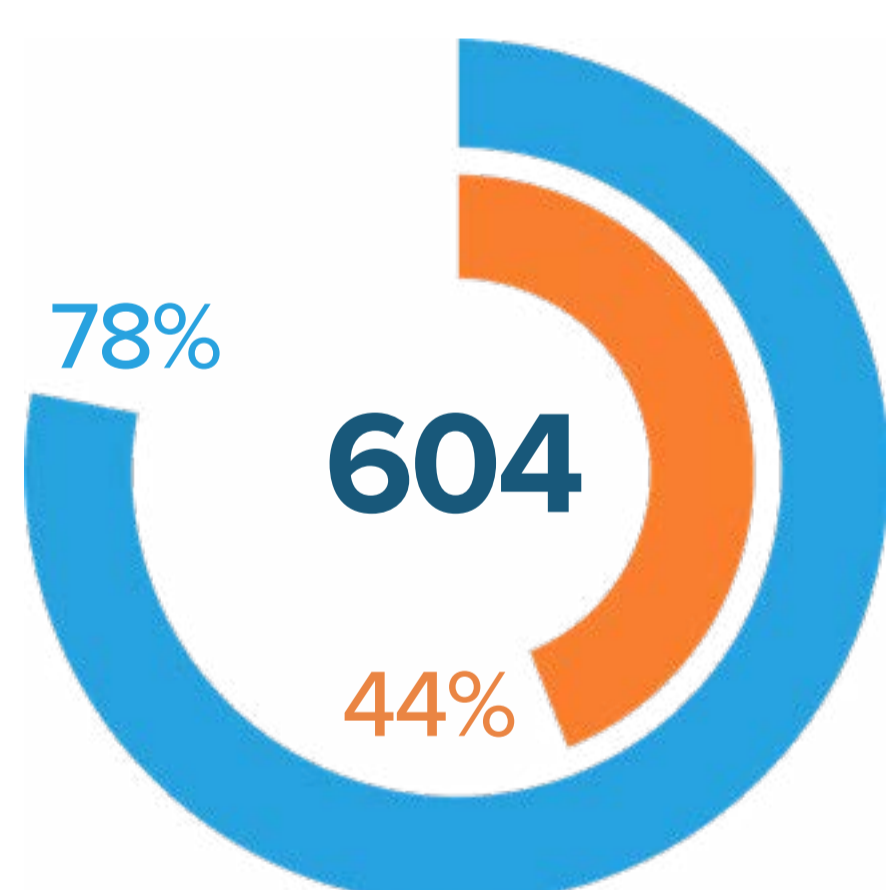
PARENTING



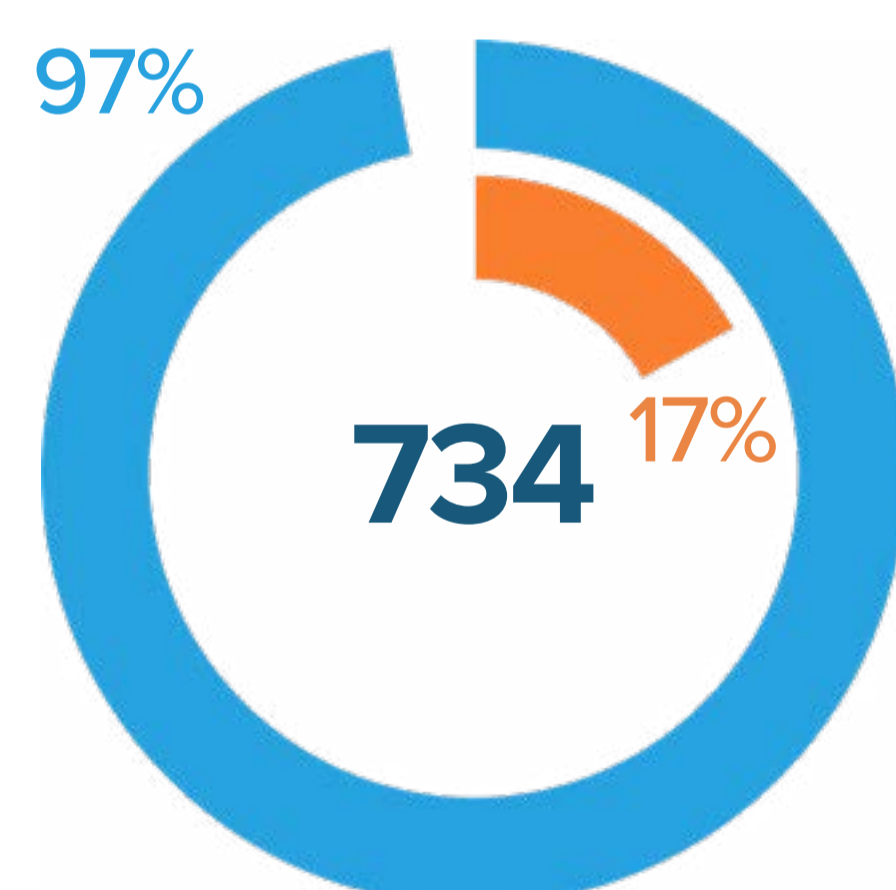
VIRAL CONTENT



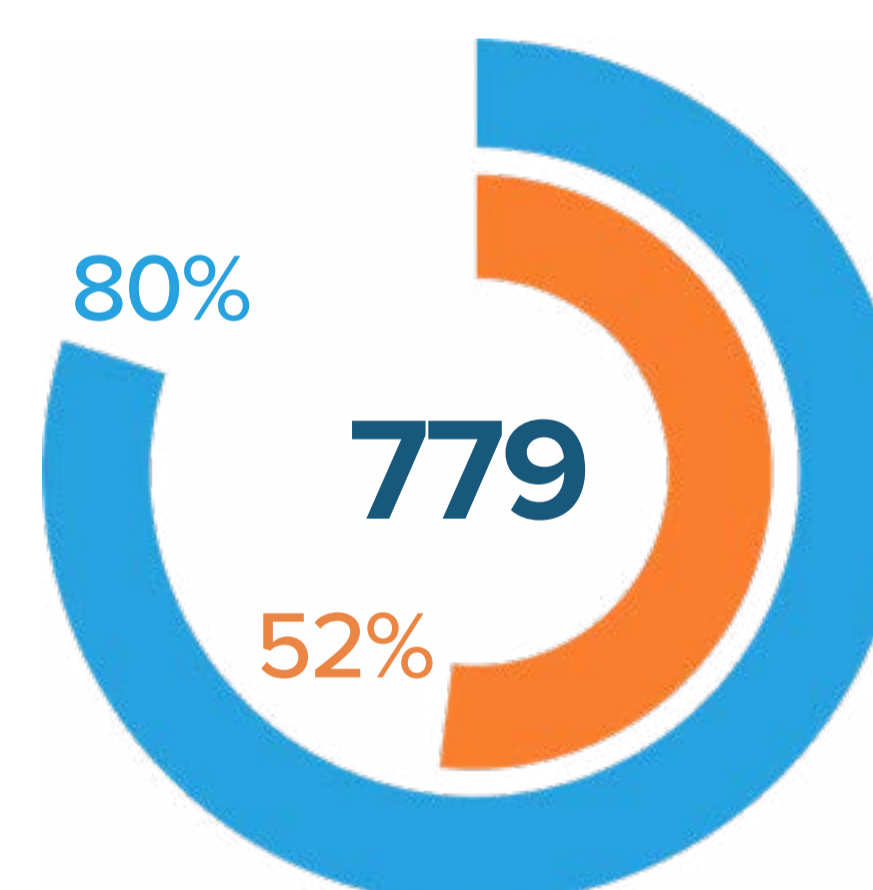
ENTERTAINMENT



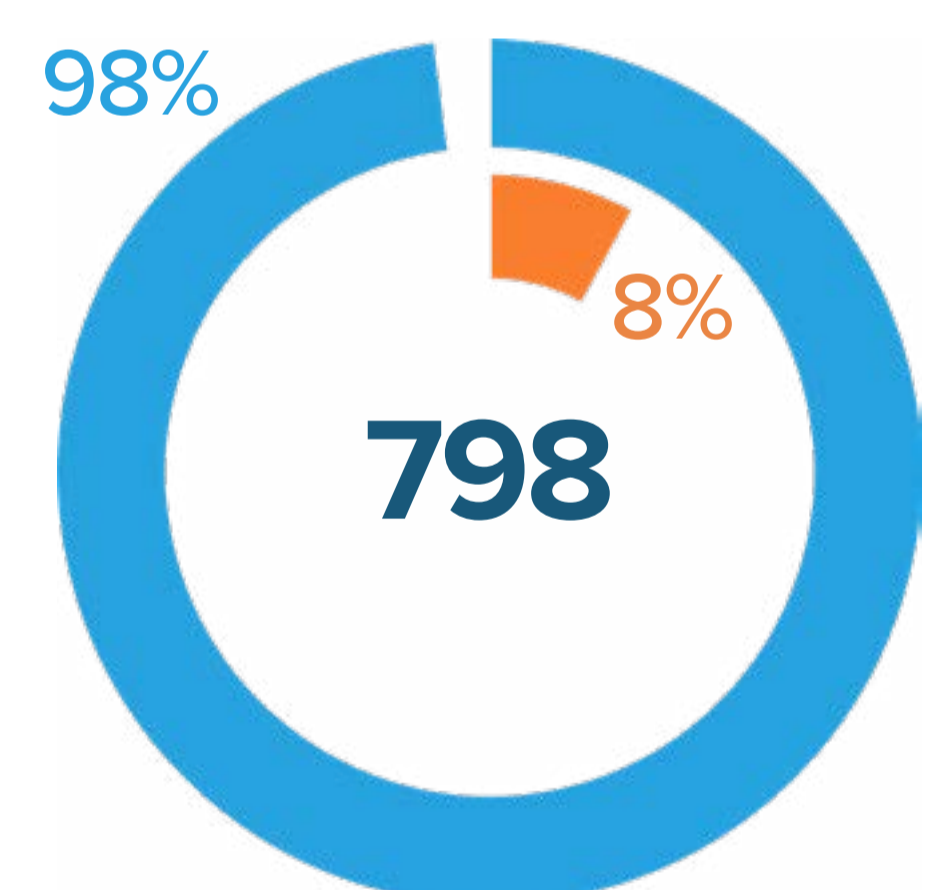
HOUSE & HOME



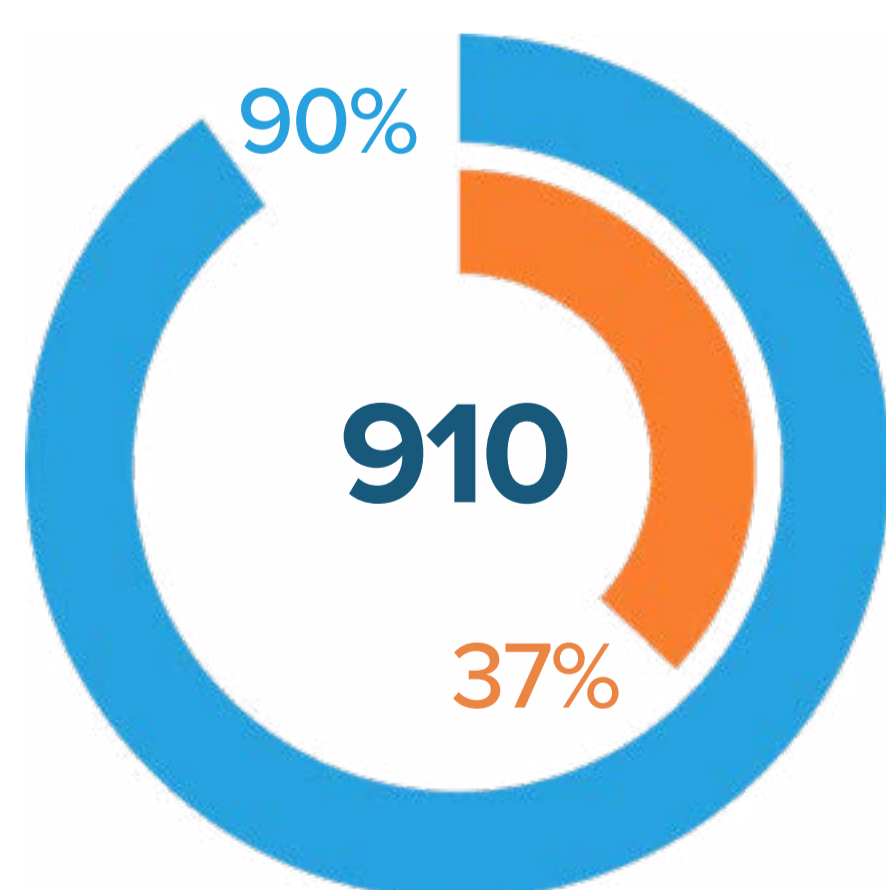
MUSIC & POP CULTURE



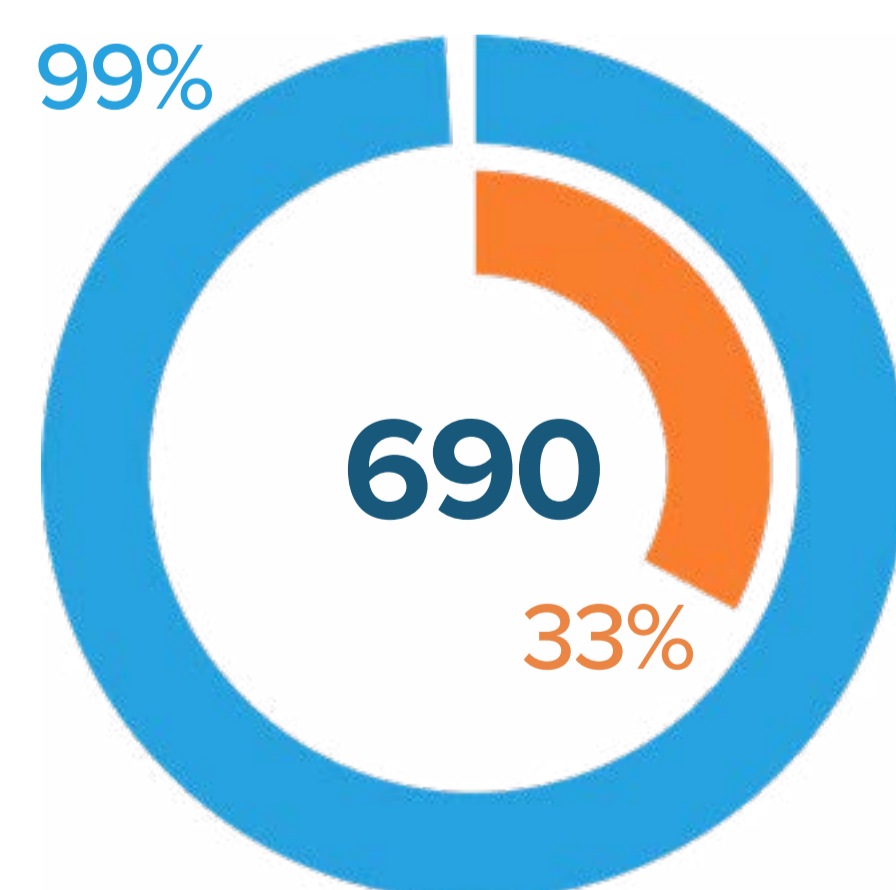
WOMEN'S LIFESTYLE



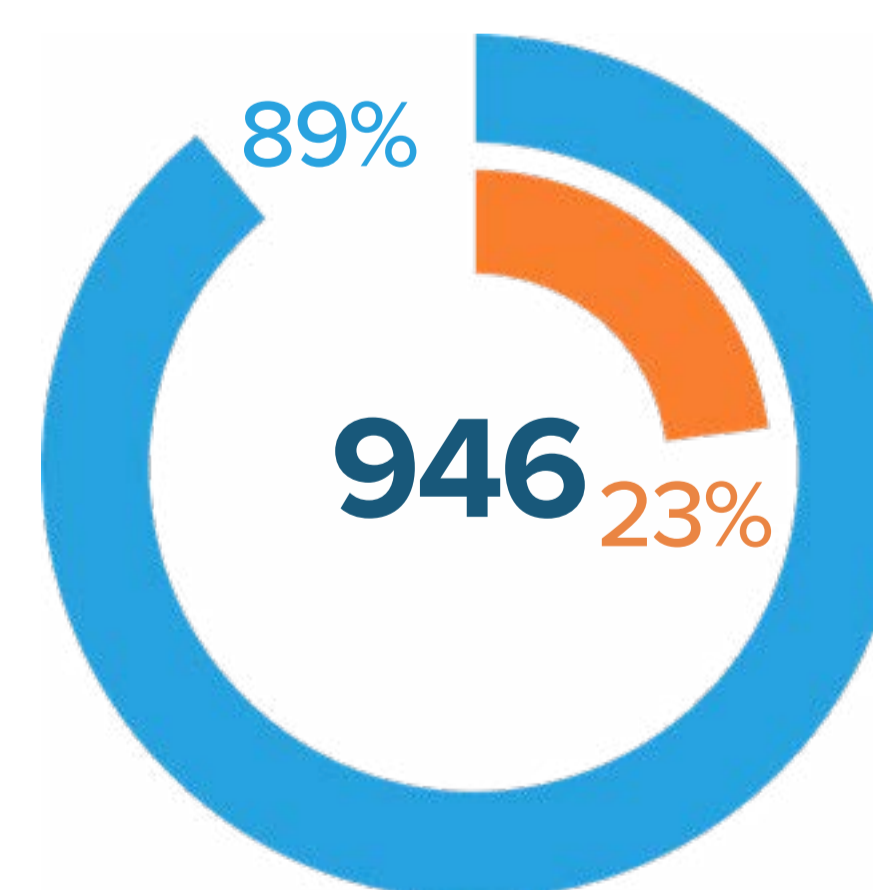
FACTUAL / NATURAL WORLD



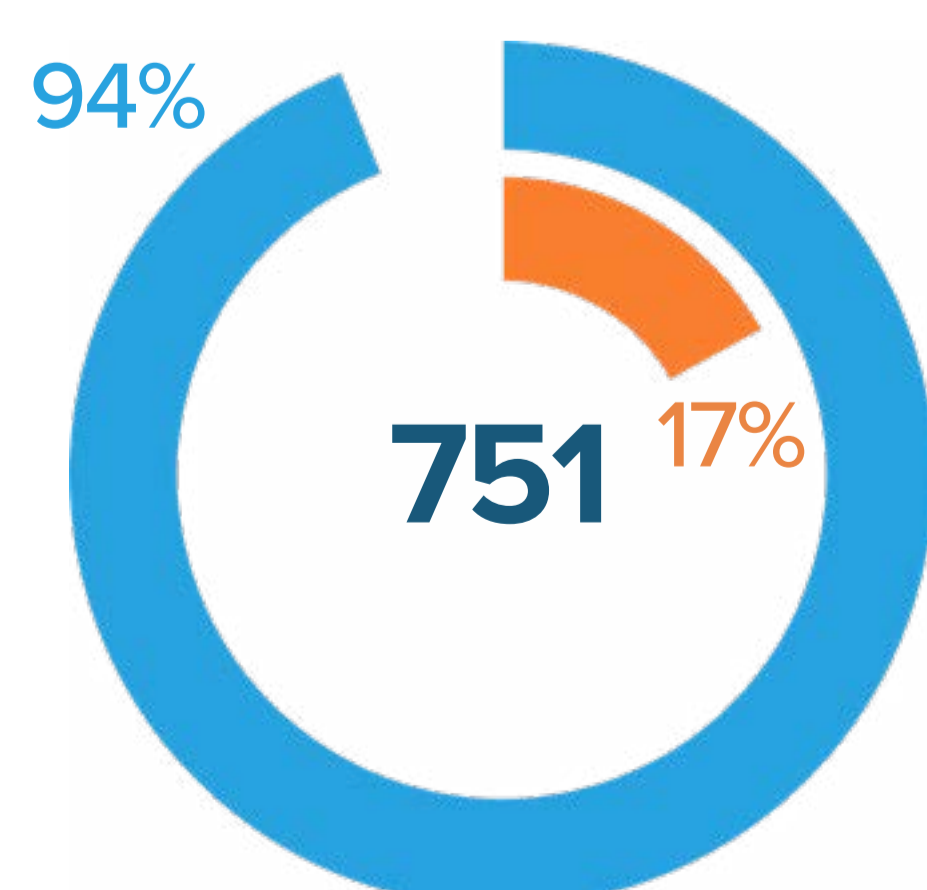
LUXURY LIFESTYLE



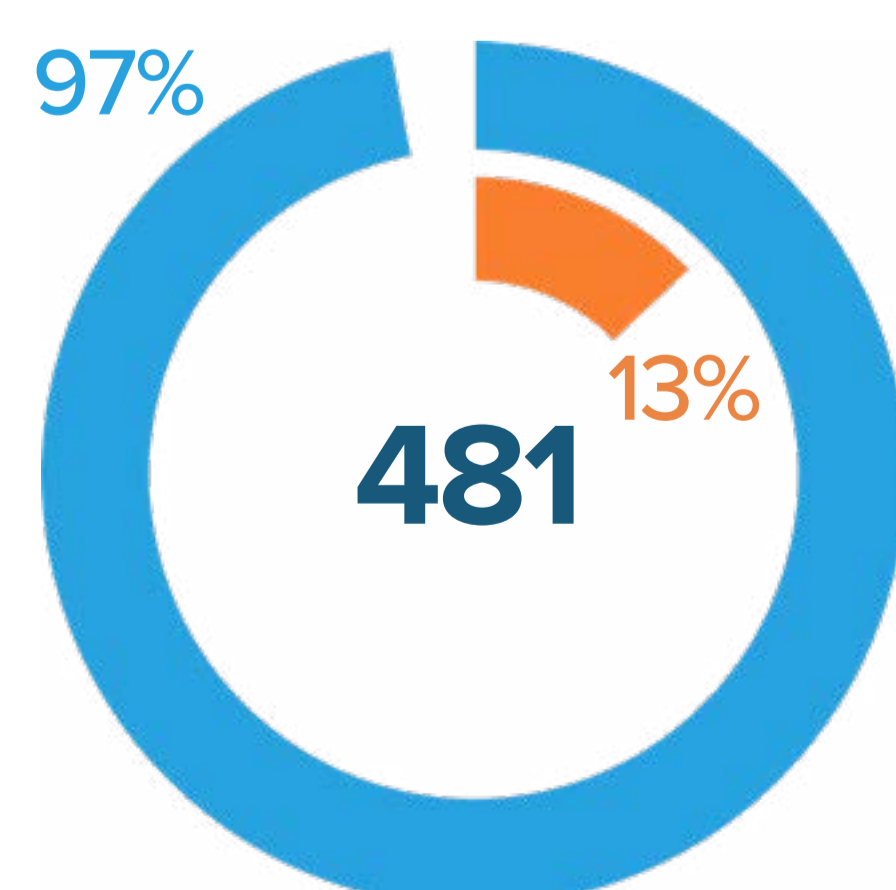
SCIENCE & TECHNOLOGY



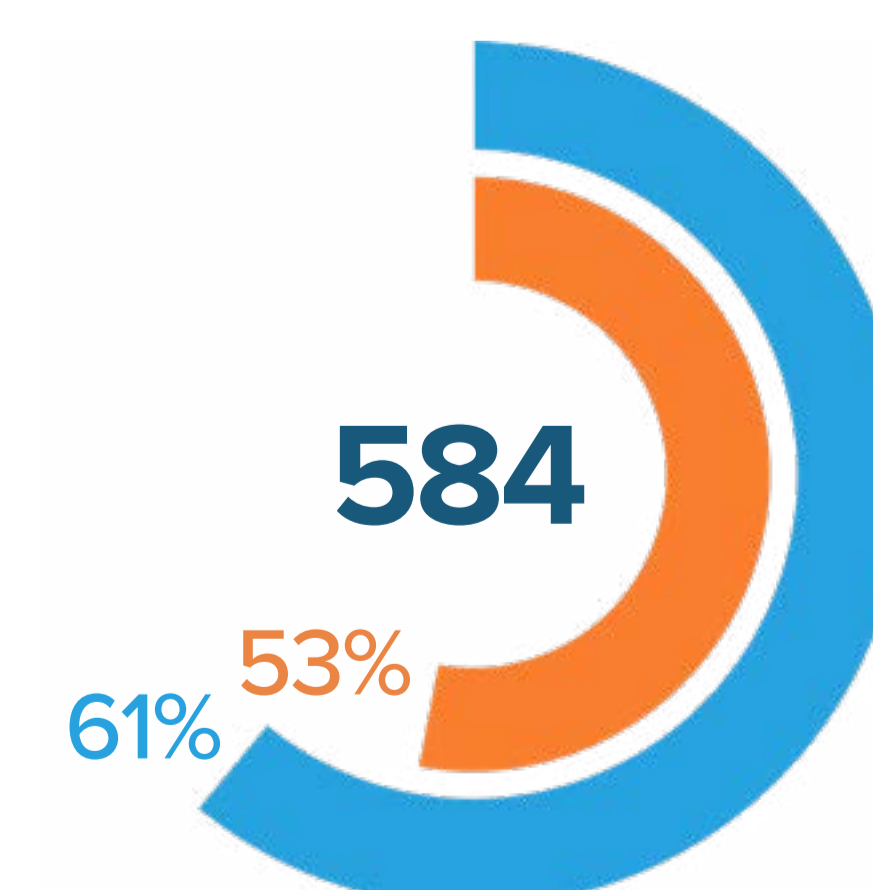
FASHION & BEAUTY



MEN'S FASHION & STYLE



SPORT



■ Static images are typically present in 90%+ of branded content other than for those genres where video is heavily used.

■ Food & Drink, Music & Popular Culture and Sport are the standout genres for video usage (present in >50% of branded content items).

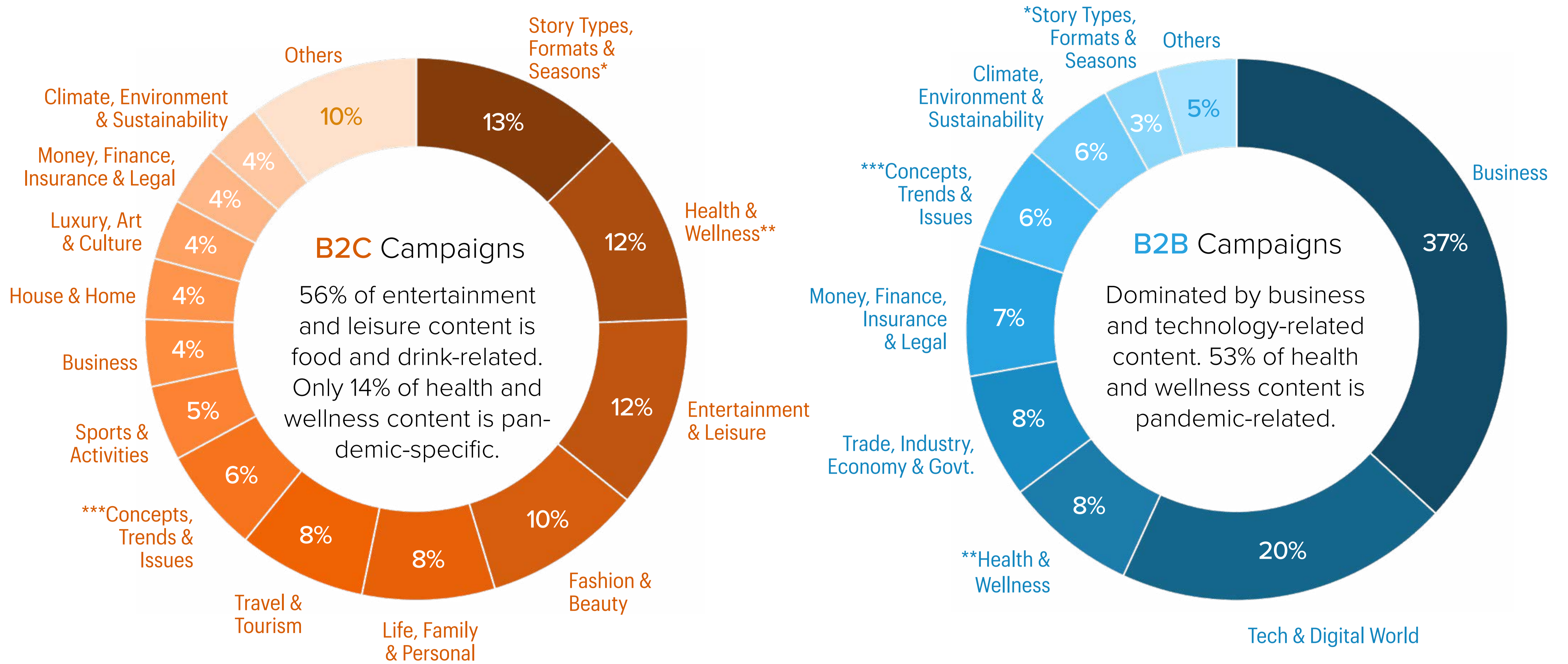
Base: average across all campaigns by publisher genre



STORYTELLING: CONTENT THEMES

Branded content strives to tell engaging stories and covers a myriad of content themes in doing so. Our content taxonomy is derived from over 50,000 theme instances and reveals the most frequently occurring of these at the broad and more specific level.

BROAD THEMES BY CAMPAIGN TARGET



*E.g. Reviews & Guides; Tips, Tricks & Hacks; Product News; Festive Season **includes the specific theme: "Pandemics & Global Health Issues"

***E.g. Innovation; Diversity & Inclusion; Women's Empowerment; Charity & Caregiving

TOP 20 SPECIFIC THEMES (% of content items containing respective theme)

B2C Campaigns

1	Travel Advice & Inspiration	10%
2	Fashion & Beauty Advice	9%
3	Reviews & Guides	9%
4	Biography & Personal Experiences	8%
5	Women's Beauty	7%
6	Wellness & Wellbeing	6%
7	Family & Parenting	6%
8	Food & Drink Recipes	6%
9	Tips, Tricks & Hacks	5%
10	Dining & Food Culture	5%
11	Product News	5%
12	Festive Season & Gifting	5%
13	Entertainment & Media	4%
14	Pandemics & Global Health Issues	4%
15	Healthcare & Patients	4%
16	People's Stories	4%
17	Gear & Gadgets	3%
18	Interior Design & Decoration	3%
19	Personal & Household Finance	3%
20	Cocktails & Drinks	3%

B2B Campaigns

1	Business Advice	20%
2	Employees & Workforce	13%
3	Pandemics & Global Health Issues	12%
4	Business Case Studies	11%
5	Digital Transformation & Disruption	11%
6	Business Strategy & Transformation	10%
7	Workplace Culture & Skills	9%
8	Business Concepts & Trends	7%
9	Investment & Market Analysis	7%
10	Market Research & Analysis	6%
11	AI & Machine Learning	6%
12	Data Protection & Cybersecurity	6%
13	Startups & Entrepreneurs	5%
14	Big Data, Data Management & Analytics	5%
15	Tech & Technological Development	5%
16	Customer Experience & Satisfaction	5%
17	Financial, Capital & Stock Markets	5%
18	Healthcare & Patients	5%
19	Sustainability	5%
20	Politics, Policy & Lobbying	4%

Although the most frequently occurring theme, travel advice and inspiration was far more prevalent pre-pandemic (found in 18% of B2C content during 12 months to Feb 2020).

B2B content themes in 2020 were often directly or indirectly pandemic-related, e.g. dealing with remote workforces and fast-tracking digital transformation.



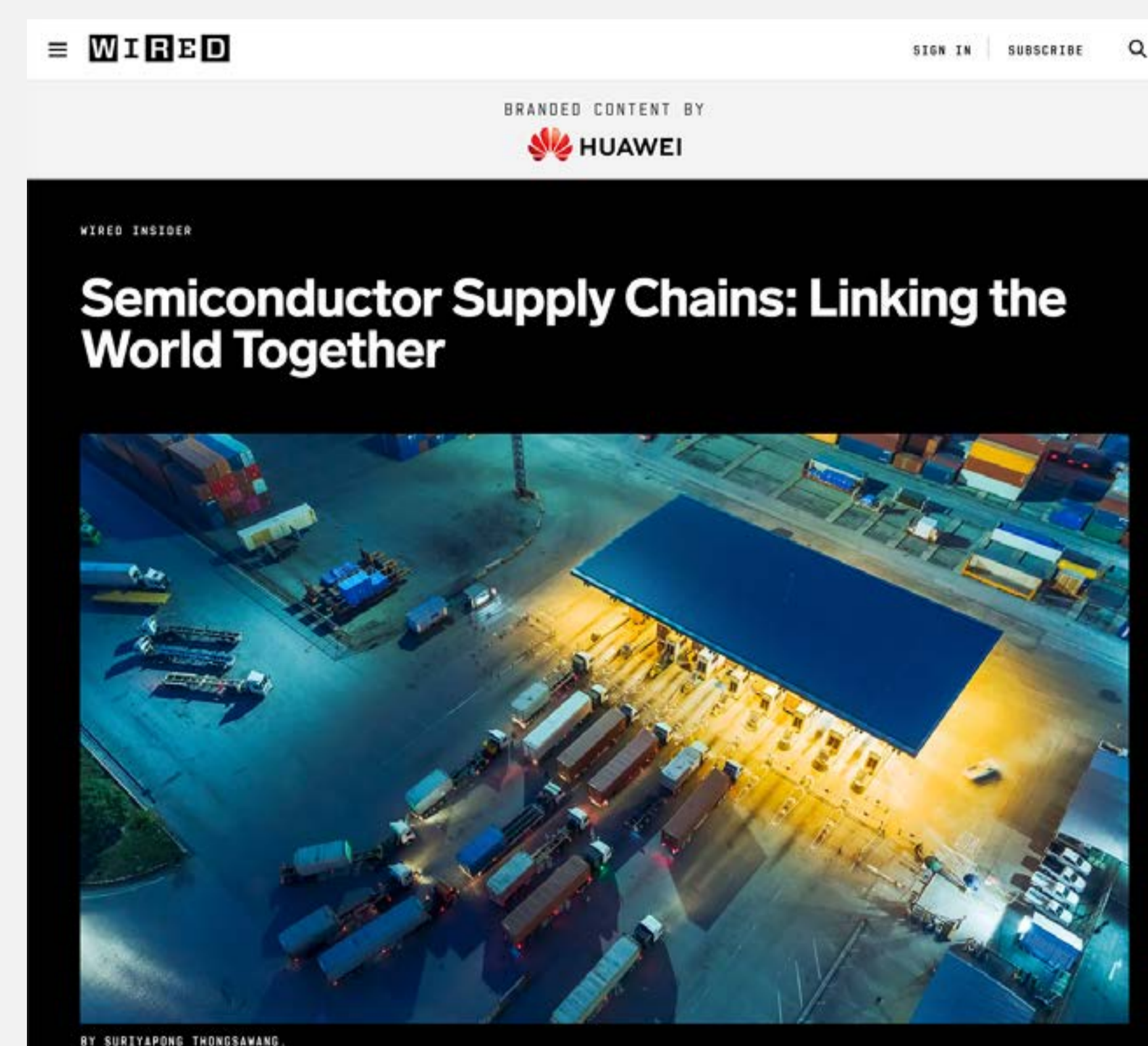
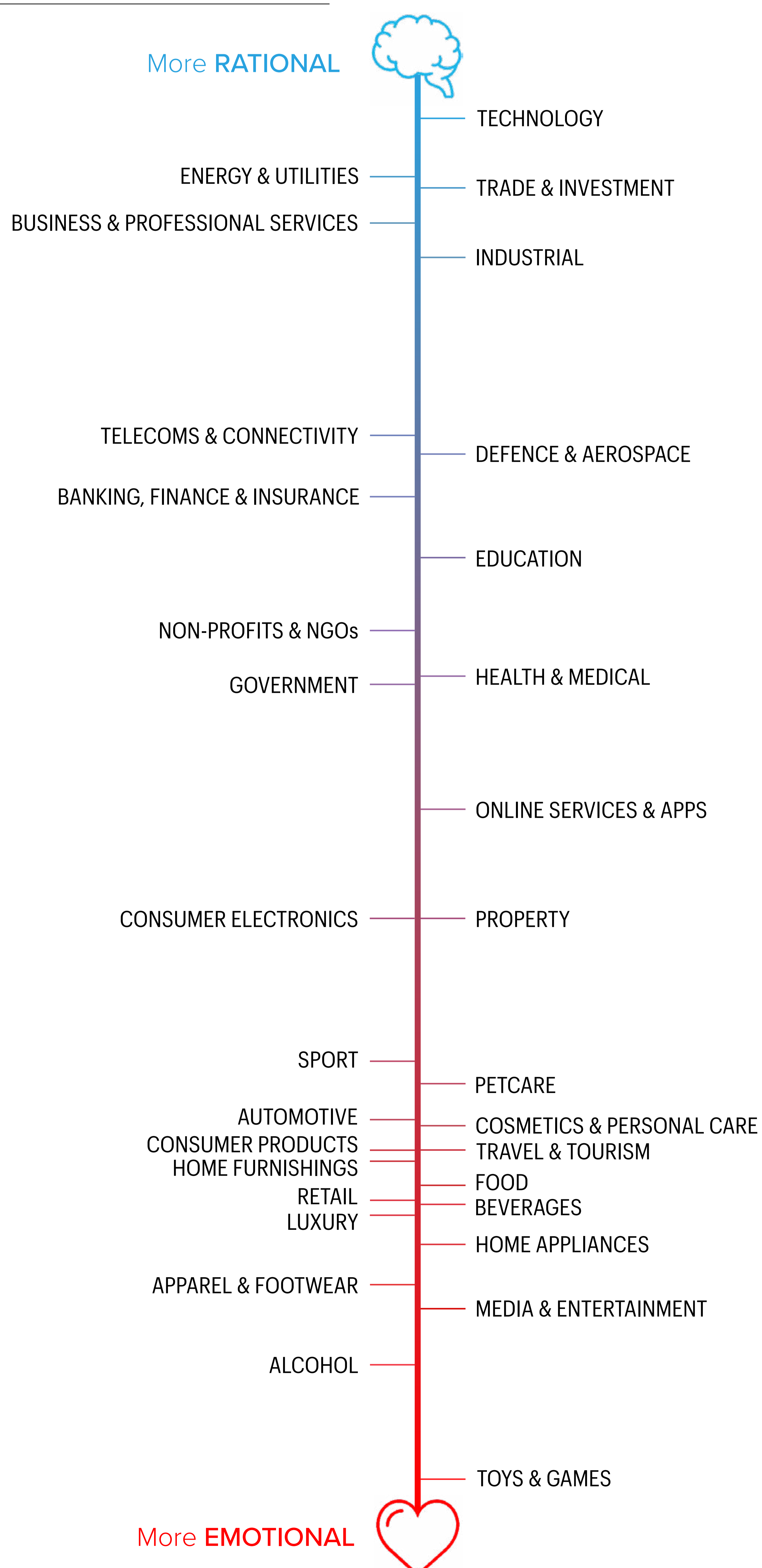
STORYTELLING: CONTENT TONE

CONTENT TONE: EMOTIONAL VS. RATIONAL

While an analysis of branded content themes tells us which topics are covered, new content analytics reveal more about the style or tone of delivery. Here we look at content tone from the highly emotional to the purely rational.

- The emotional-rational balance of branded content, i.e. where a given campaign or article sits on the E-R spectrum, is strongly linked to the brand's sector and sub-sector.

Relative E-R balance by sector:



Top 10 sub-sectors with...

Strong **RATIONAL** scores:

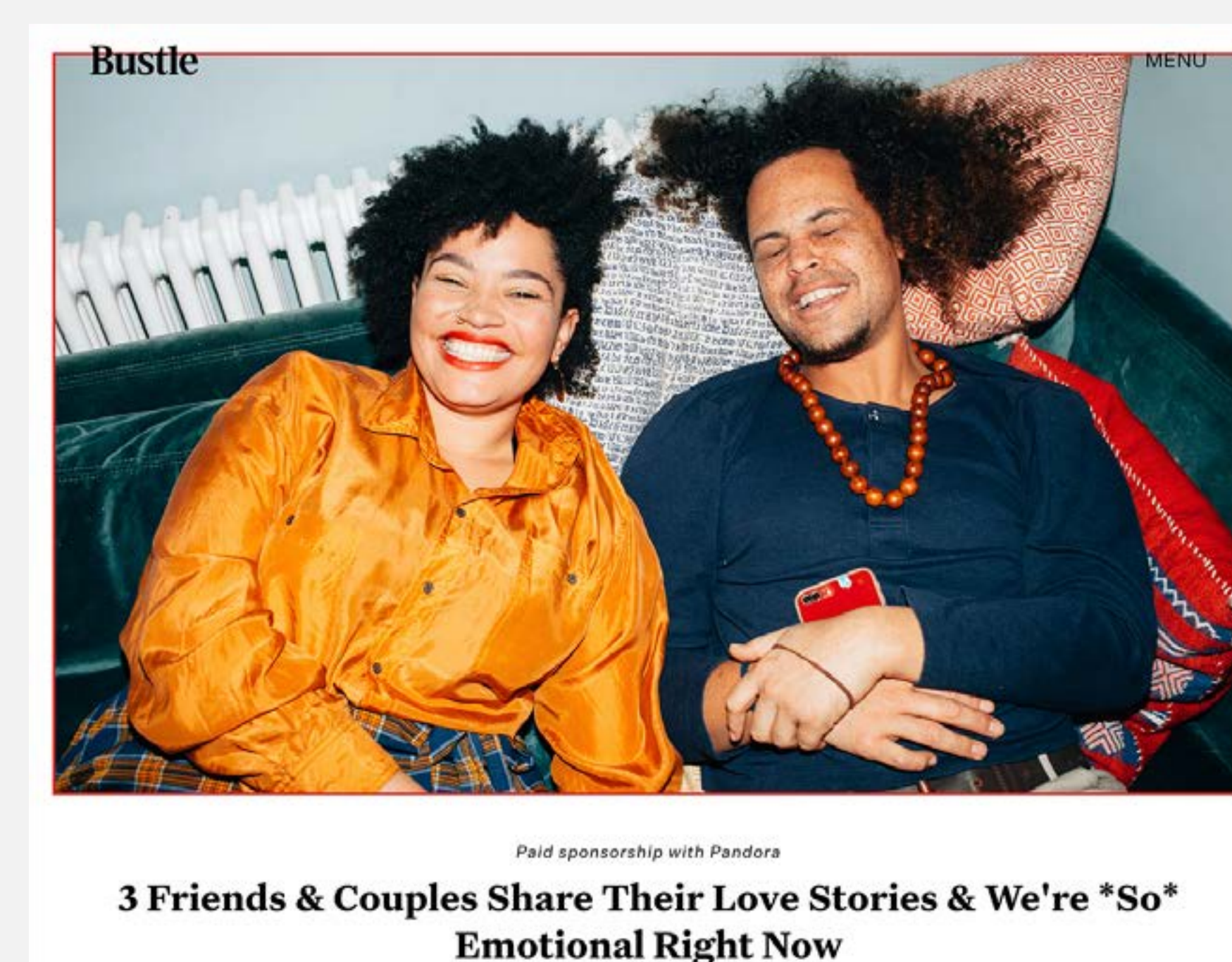


- 1 AI Technology & Research
- 2 Private Banking
- 3 Data Protection & Cybersecurity
- 4 Market Research & Business Intel Services
- 5 Stock Markets, Indices & Exchanges
- 6 IT Consulting & Transformation
- 7 Digital Transformation & Data Governance
- 8 Microchips, CPUs & GPUs
- 9 Energy Companies
- 10 Engineering & Construction

Strong **EMOTIONAL** scores:



- 1 Movies & Movie Studios
- 2 Dating & Matchmaking
- 3 Pay-TV & Video Streaming Services
- 4 TV Channels & TV / Video Series
- 5 Brandy, Cognac & Armagnac
- 6 Baby Products
- 7 Jewellery
- 8 Jeans / Denim
- 9 Beer & Cider
- 10 Music Downloads / Streaming & Audiobooks





STORYTELLING: CONTENT ARCHETYPES

CONTENT ARCHETYPES

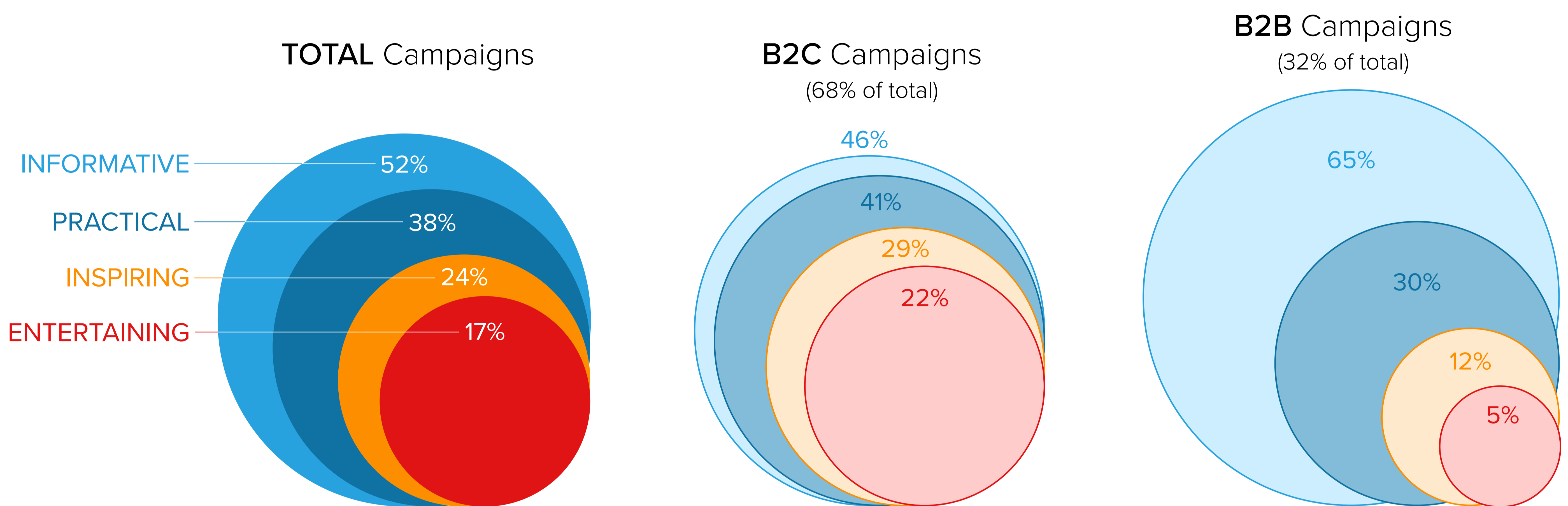
Although a branded content campaign's ultimate objective may be to raise brand awareness or consideration, to drive conversion or to generate advocacy, it does this by conforming to established storytelling archetypes.

- Semantic analysis of thousands of branded content campaigns has identified four archetypes:

ARCHETYPE	Content aims to...
<input type="checkbox"/> INFORMATIVE	inform, educate or clarify
<input type="checkbox"/> PRACTICAL	impart practical knowledge, advise and recommend
<input type="checkbox"/> INSPIRING	inspire, promote ideas, excite or impress
<input type="checkbox"/> ENTERTAINING	entertain, amuse or give pleasure

AVERAGE ARCHETYPE SCORES*

Most branded content contains a blend of two or more archetypes and the long-form nature of the content facilitates this. E.g. Travel & Tourism campaigns are often practical - advising and recommending - but also seek to inspire.



- While archetype scores for individual content items can range between 0 and 100, the broad averages confirm that digital branded content is most likely to be informative. This is particularly the case for B2B content, 96% of which has INFORMATIVE as its lead archetype.

- Archetype scores for B2C campaigns are more nuanced overall. They skew towards INFORMATIVE and PRACTICAL, which are the lead archetypes in 80% of cases, yet frequently retain INSPIRING and ENTERTAINING elements.

TOP SECTORS BY ARCHETYPE (by average archetype score)

INFORMATIVE			PRACTICAL			INSPIRING			ENTERTAINING		
1	Energy & Utilities	69%	1	Travel & Tourism	57%	1	Travel & Tourism	48%	1	Media & Entertainment	34%
2	Trade & Investment	66%	2	Retail	50%	2	Apparel & Footwear	35%	2	Toys & Games	34%
3	Industrial	66%	3	Apparel & Footwear	47%	3	Alcohol	34%	3	Alcohol	31%
4	Technology	63%	4	Home Furnishings & Decor	46%	4	Luxury	31%	4	Food	27%
5	Business & Prof. Services	62%	5	Cosmetics & Personal Care	45%	5	Sport	31%	5	Beverages	26%
6	Defence & Aerospace	60%	6	Home Appliances	45%	6	Home Furnishings & Decor	31%	6	Luxury	24%
7	Banking, Finance, Insurance	59%	7	Consumer Products	44%	7	Food	30%	7	Automotive	24%
8	Education	58%	8	Sport	44%	8	Home Appliances	30%	8	Petcare	23%
9	Non-Profits & NGOs	58%	9	Online Services & Apps	42%	9	Automotive	30%	9	Home Appliances	23%
10	Telecoms & Connectivity	58%	10	Food	42%	10	Retail	30%	10	Consumer Products	22%

*Scores do not sum to 100 as each archetype is scored independently. All archetype scoring is based on textual content.



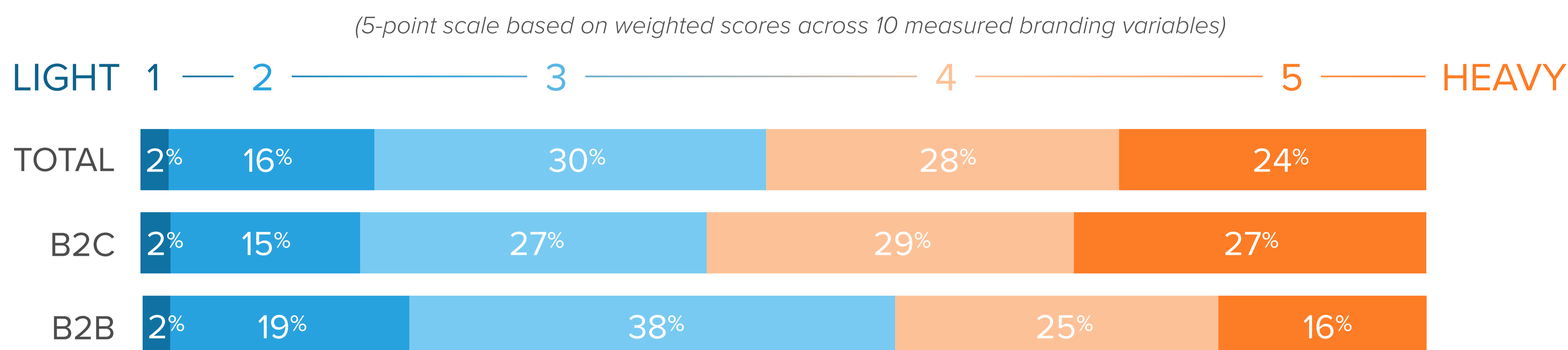
BRANDING

BRANDED CONTENT

BRANDING LEVEL

Putting the brand in branded content is not a simple task. Overt branding runs the risk of alienating the target audience while erring on the side of subtlety can jeopardize marketing objectives. At the same time branded content cannot appear incongruous next to editorial content.

After scoring all monitored content against 10 distinct branding variables, the overall branding level or weight is revealed...



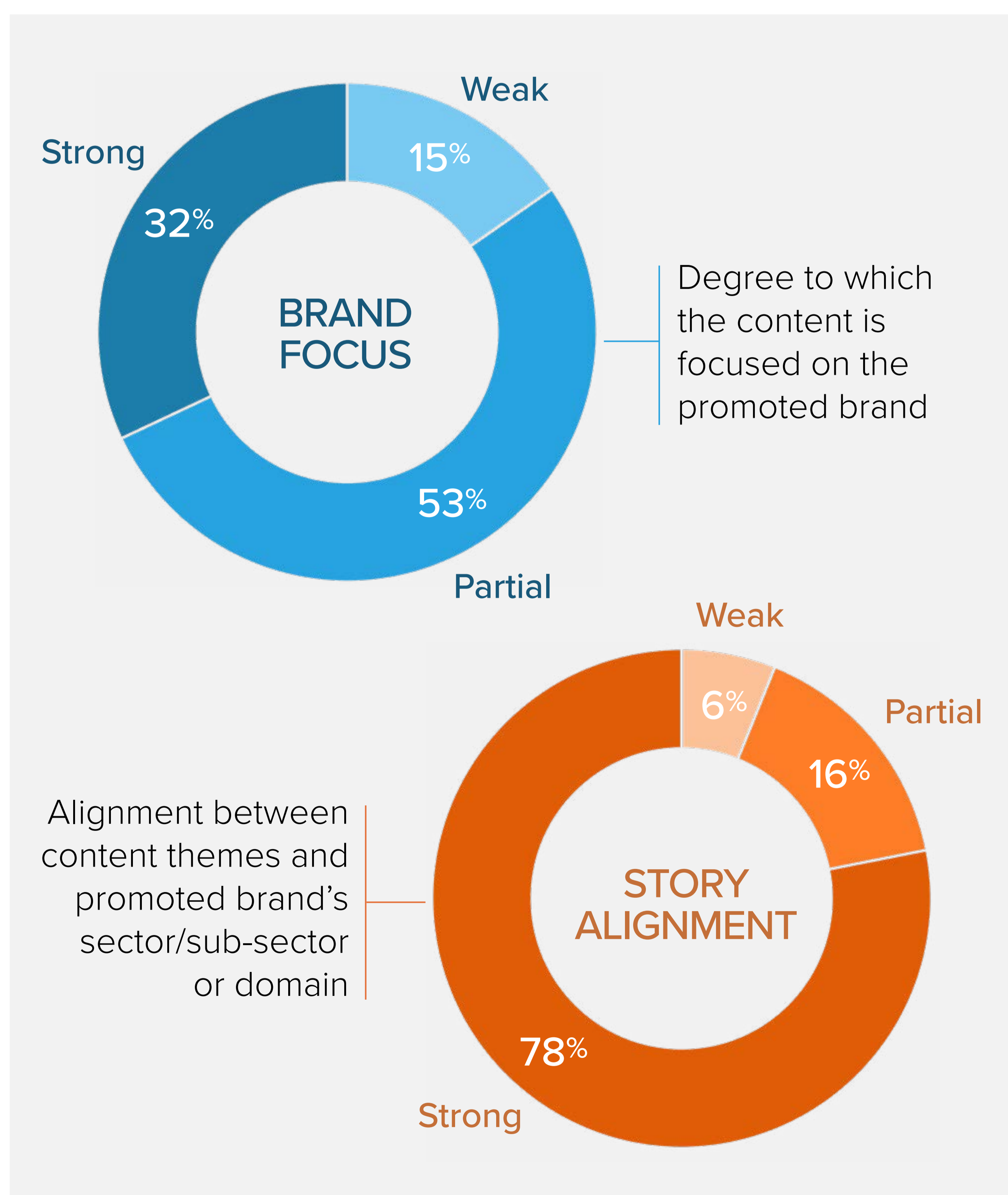
■ Relatively heavy branding is the norm for 52% of branded content vs. 18% light. More so for B2C campaigns than B2B (56% and 41% heavy respectively).

■ Editorial sponsorships are the exception to the rule (61% light branding vs. 19% heavy).

COMPONENTS OF BRANDING:

1) BRAND FOCUS & STORY ALIGNMENT

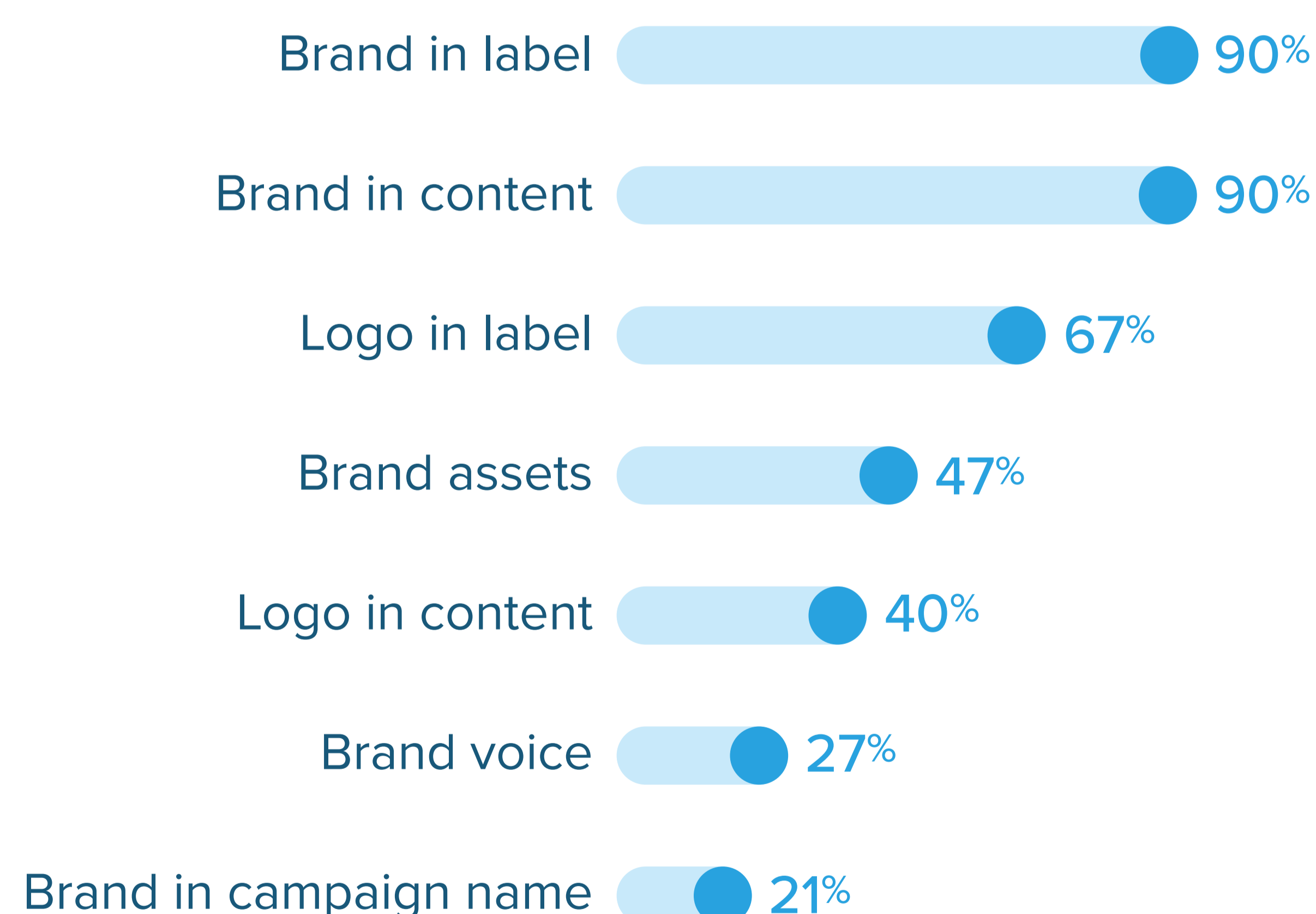
The majority of campaigns employ clever story alignment rather than overt, self-centered brand focus.



2) BRANDING MECHANICS

9-in-10 campaigns include the brand name in the campaign label (learn more about labels [here](#)) and mention the brand within the content.

Brand assets (e.g. product images or photos of company staff) are present in around half of all campaigns.



Brand Voice (brand spokesperson or author) and presence of brand name in the campaign name or article title are less frequently used branding mechanics.

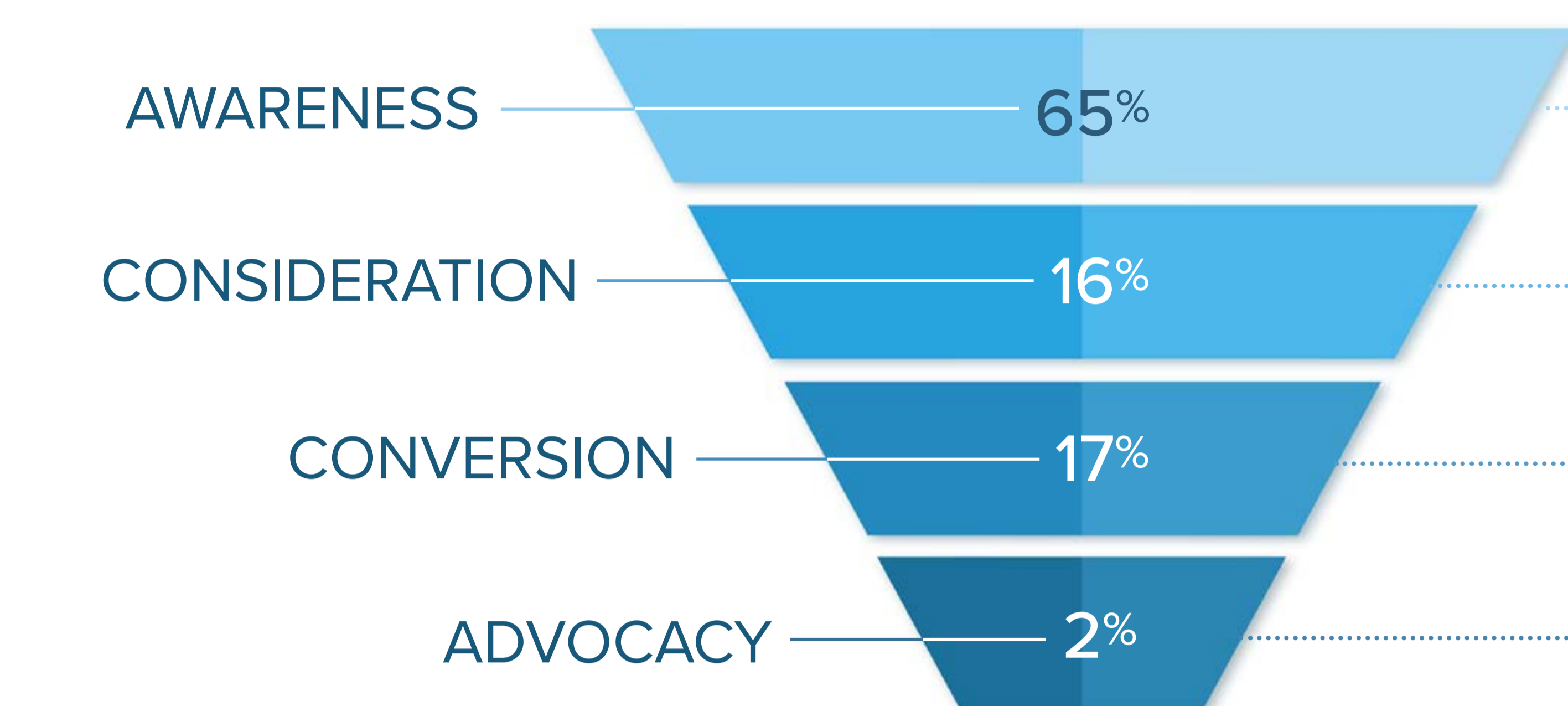
Base for components of branding: content items identified between 01/01/20 and 31/12/20



MARKETING OBJECTIVES

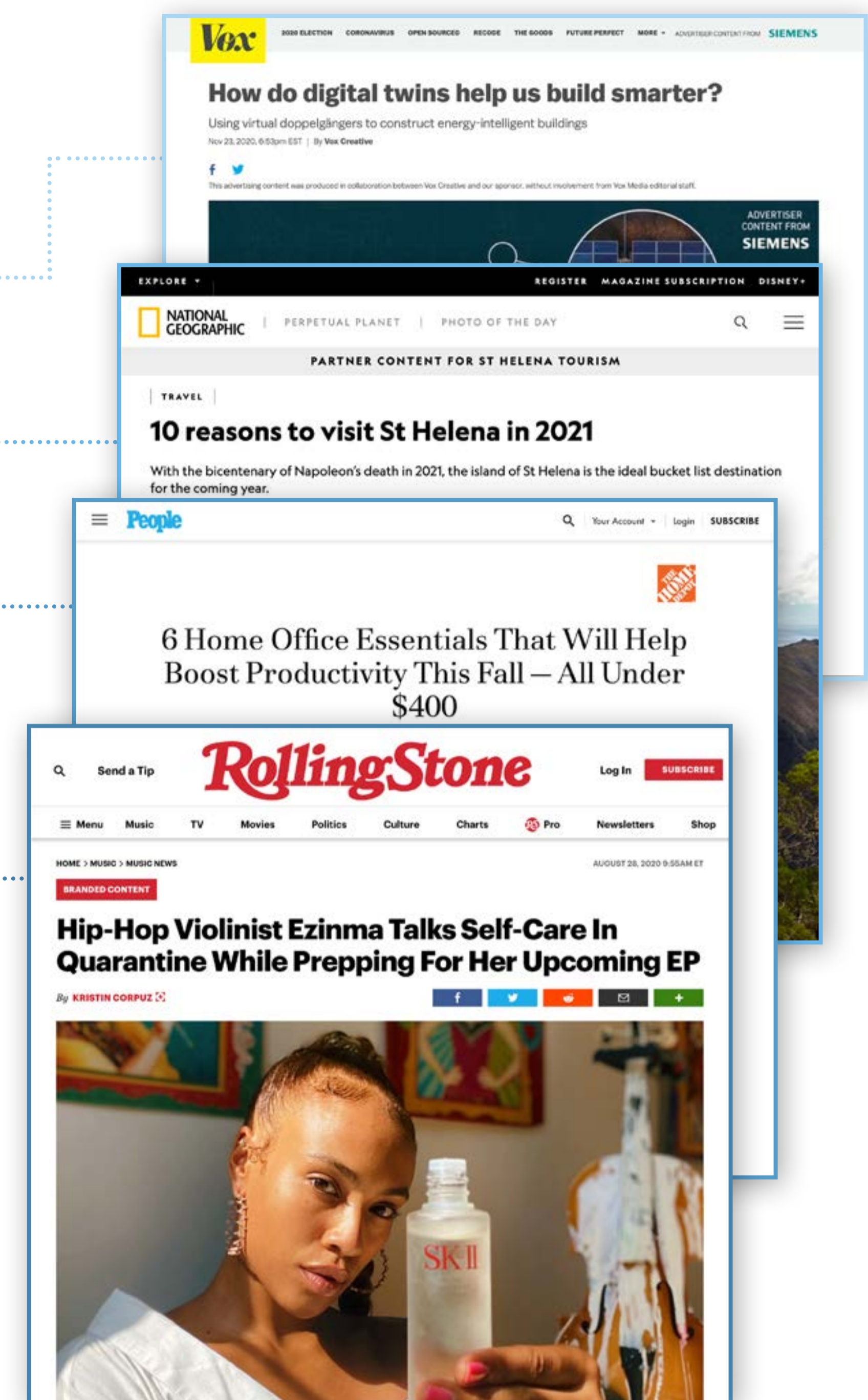
Branded content has an active role to play in fulfilling all high-level marketing objectives. While awareness building is a known strength of branded content, its role extends well below the top of the marketing funnel.

CONTENT BY MARKETING OBJECTIVE



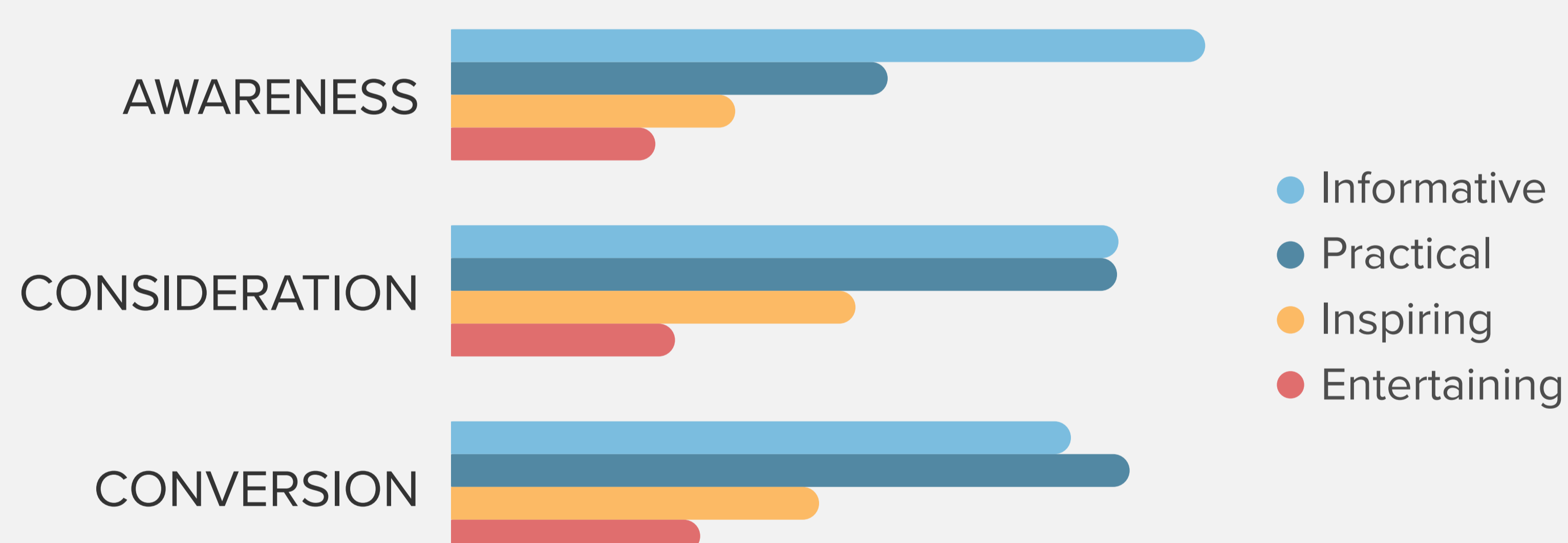
- More than a third of campaigns aim to promote consideration, drive conversion or generate advocacy.

Base: campaigns with identified marketing objectives (90% of total)



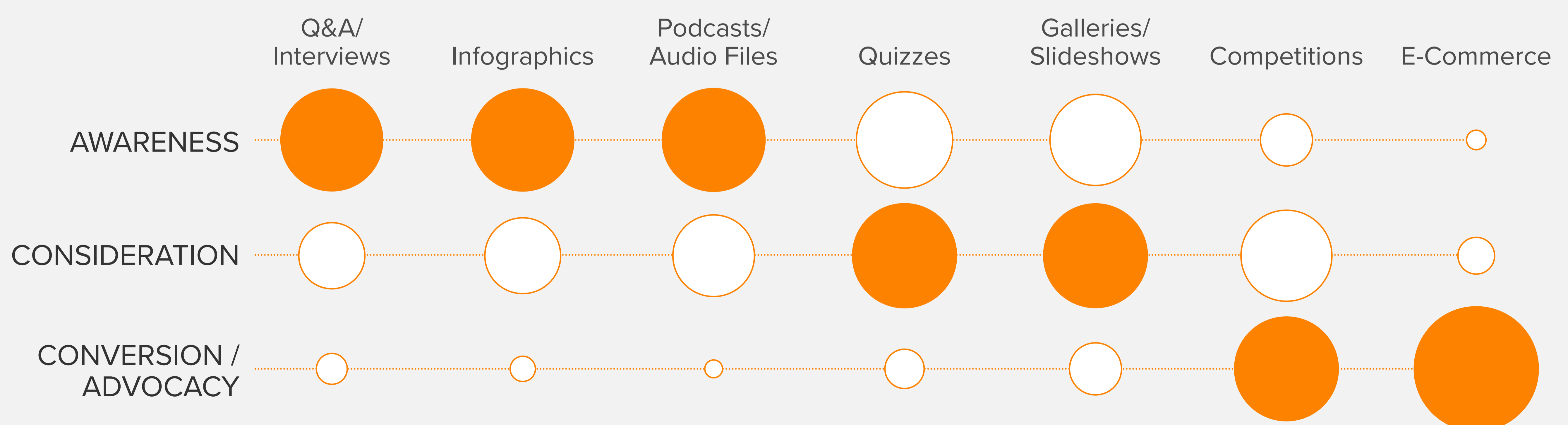
OBJECTIVES & ARCHETYPES

(Average archetype scores by campaign objective)



- Awareness campaigns primarily inform. Consideration and Conversion campaigns are as likely to conform to the practical archetype and are also more likely to inspire or entertain.

OBJECTIVES & FORMATS (format incidence per objective vs. total incidence)



- Specific content formats and mechanisms are clearly aligned with marketing objectives.



IDENTIFYING BRANDED CONTENT

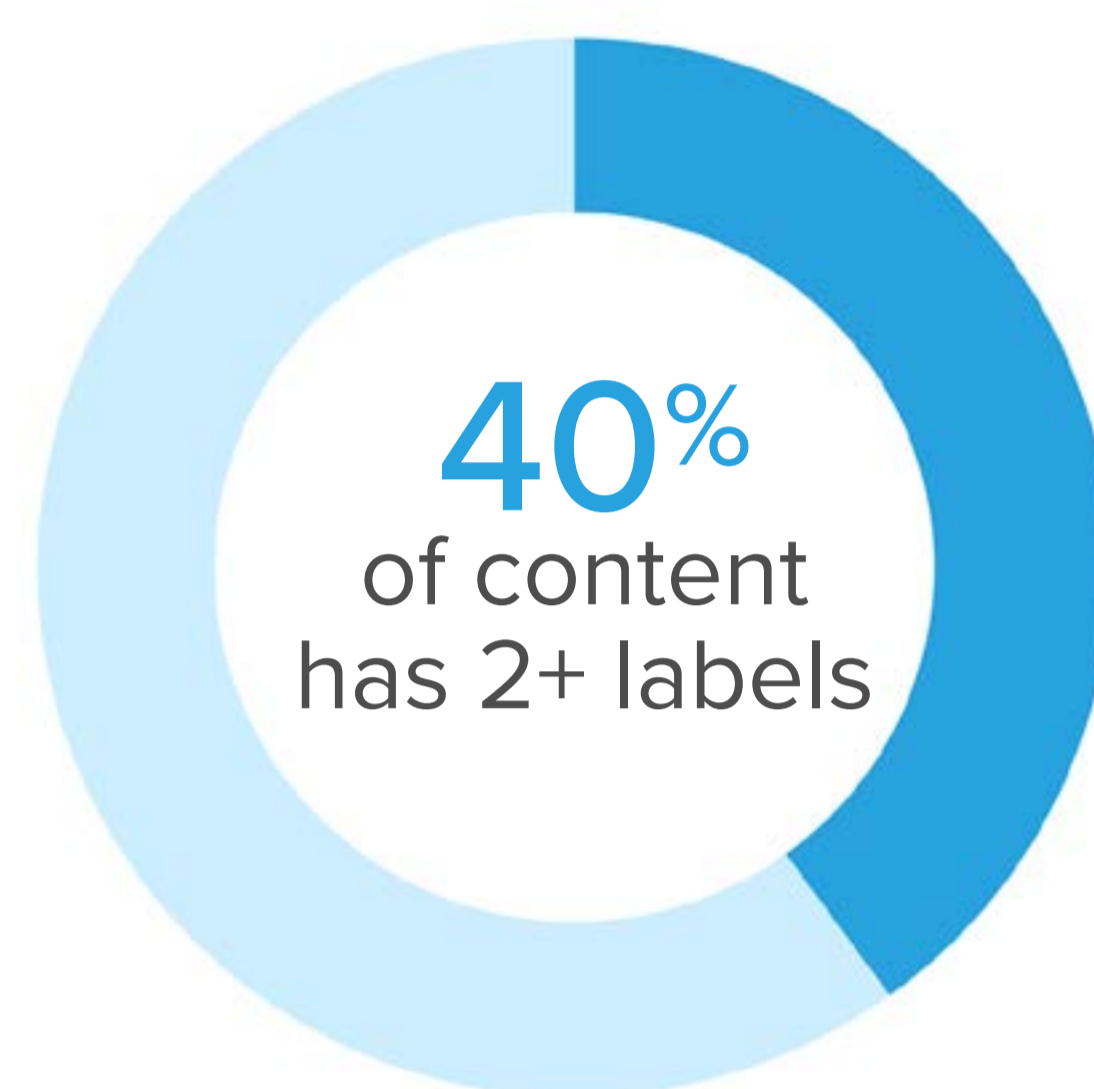
CONTENT LABELLING

Clear and unambiguous labelling of branded content is a cornerstone of the trust-based relationship between publishers and brands and their audiences and consumers.

Labelling is mandated within the USA by the FTC, though, publishers in and outside the US have

long-established labelling policies, which frequently include multiple labels and disclaimers.

As the label count below shows, there is a clear absence of common labelling language across publishers. However, consistency across content at the individual publisher level is the norm.



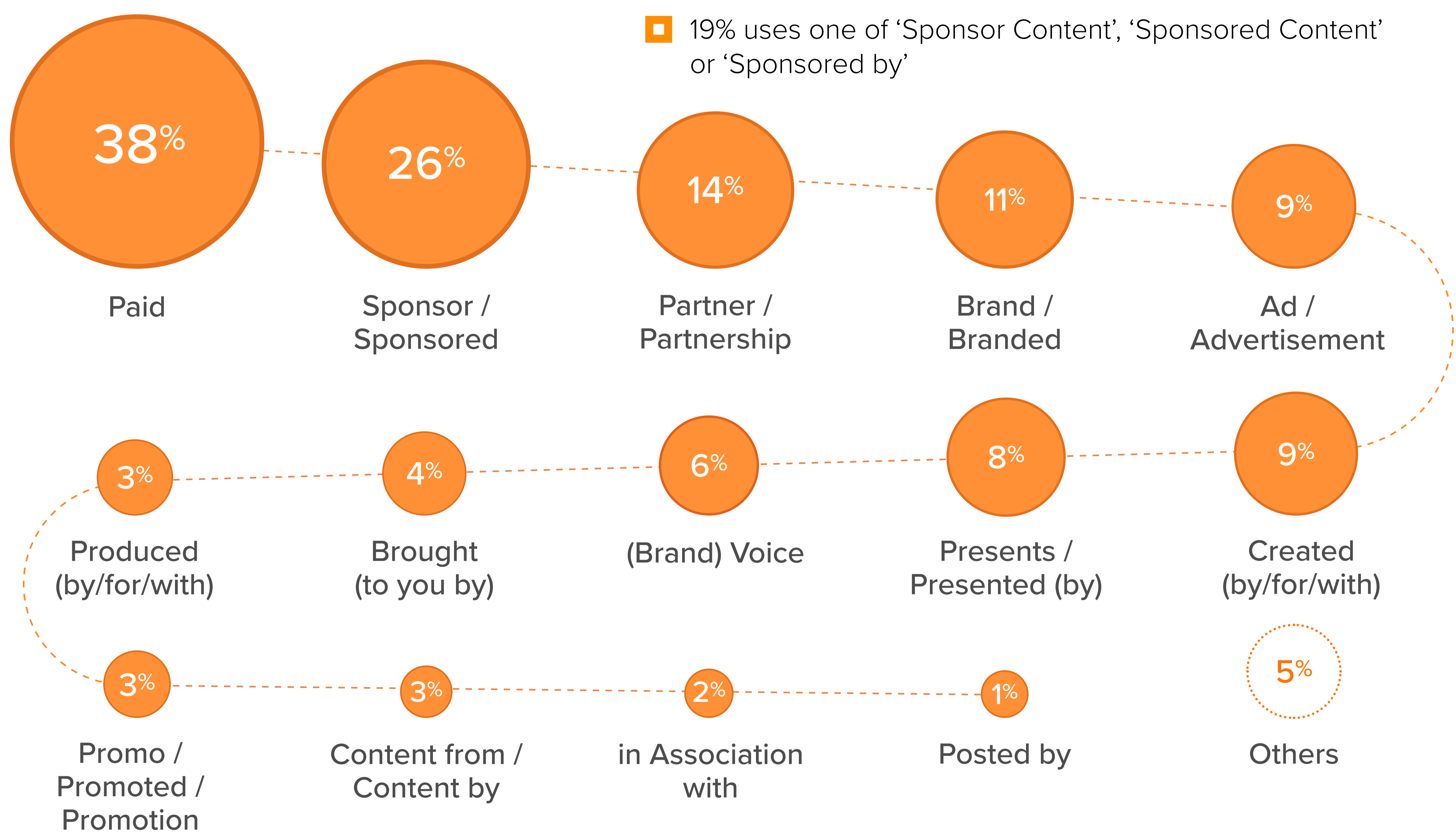
Labels are frequently supplemented with disclaimers explaining the commercial, i.e. non-editorial nature of content.



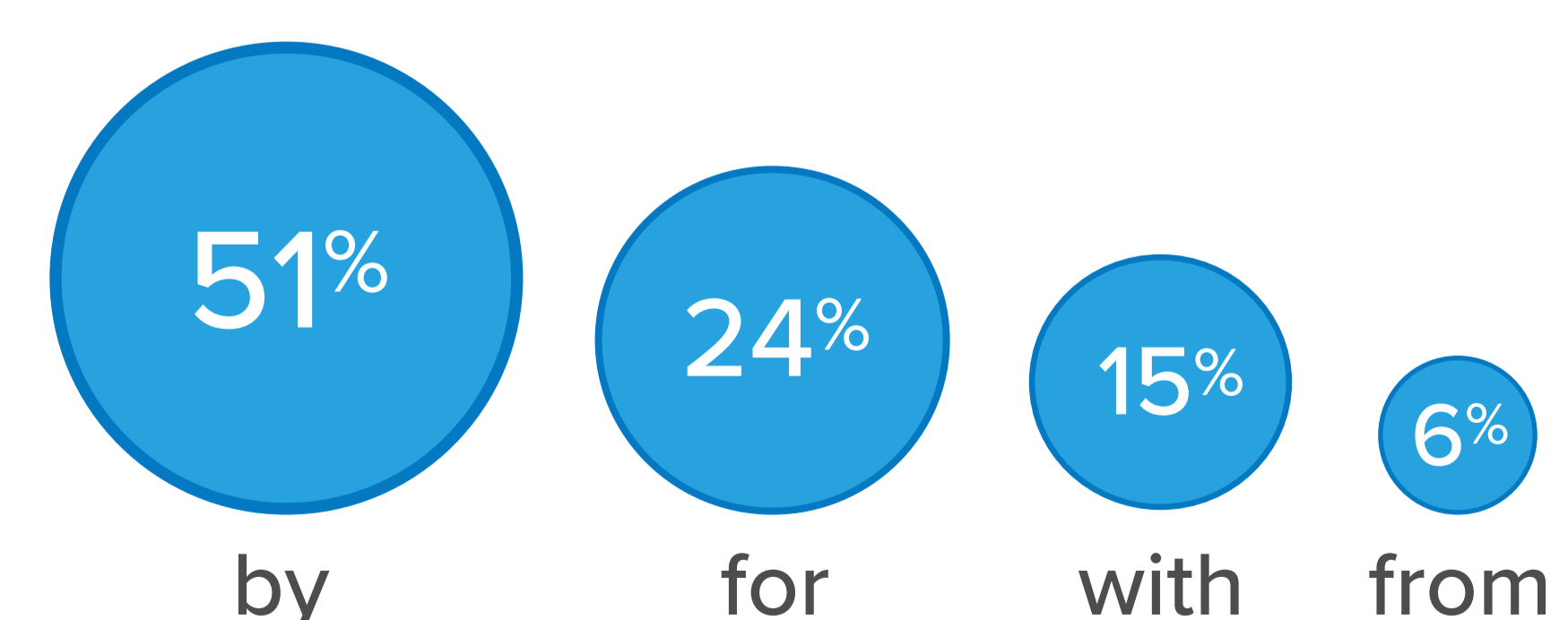
Hard to quantify, as unlabelled content is more difficult to monitor. True value will be higher but certainly a low single-digit number.

MOST FREQUENTLY USED LABELS (Keywords) :

- 27% of content uses one of the following four: 'Paid Post', 'Paid Content', 'Paid Program' or 'Paid Promo'.
- 19% uses one of 'Sponsor Content', 'Sponsored Content' or 'Sponsored by'



MOST OFTEN USED IN CONJUNCTION WITH :



*Labelling rate is complicated by some cases where native display ads or in-house publisher banners promoting branded content are labelled but the content they link to is not. Similarly, there are cases where a publisher's social posts are labelled as required but labelling is absent on clickthrough to the linked content.

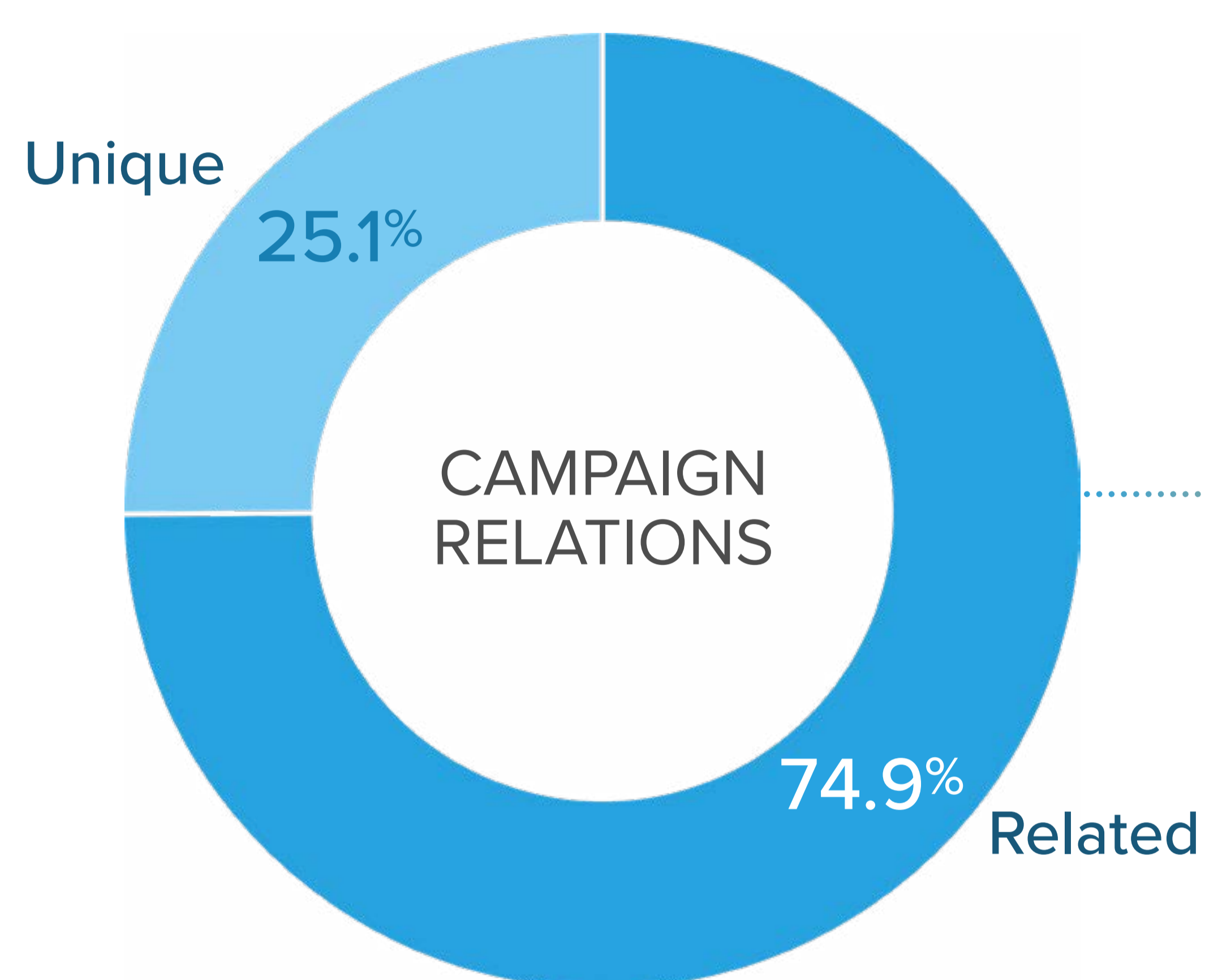


CAMPAIGN RELATIONS

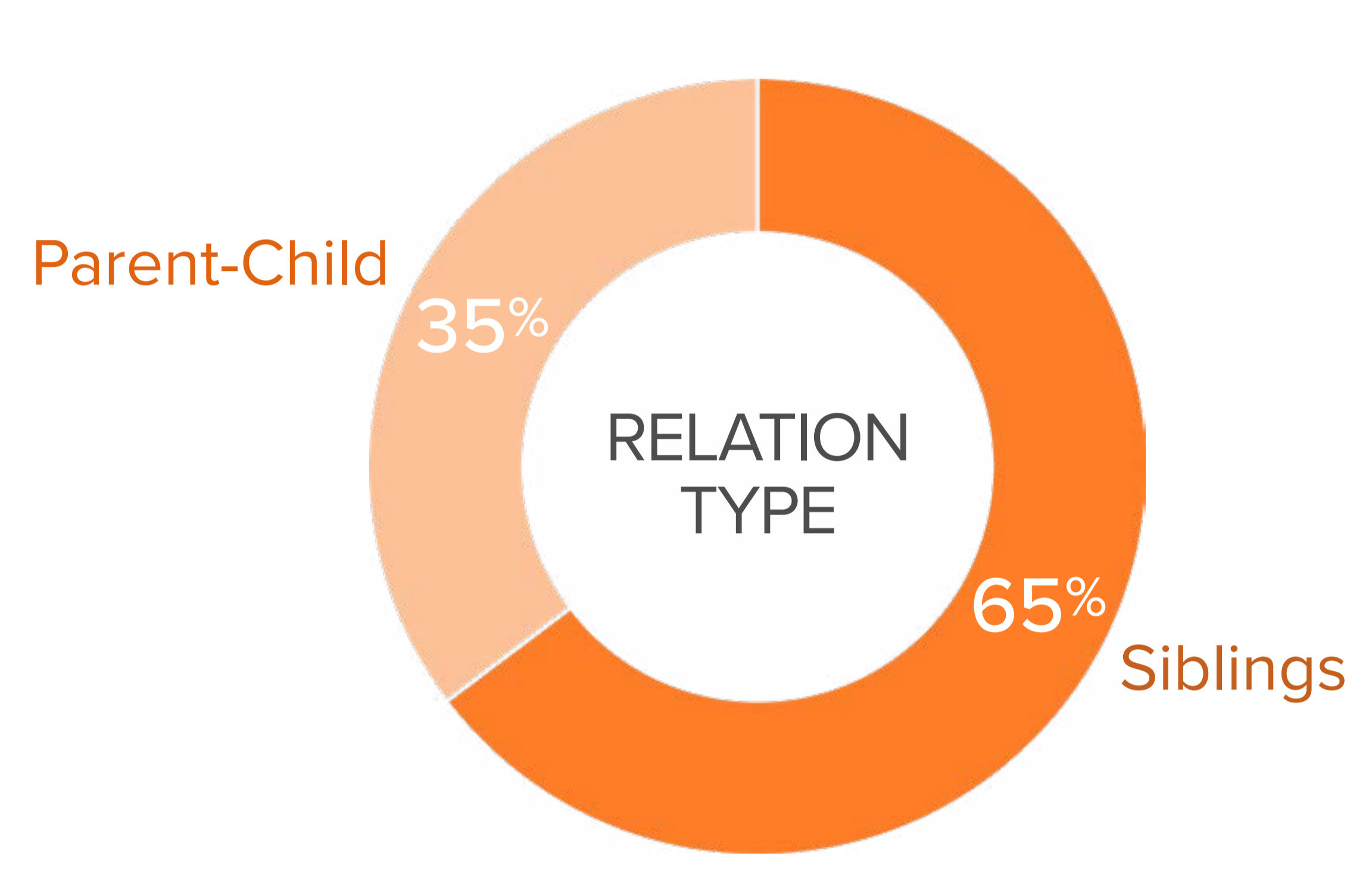
In the majority of cases individual branded content items (ad features, branded articles, branded videos etc.) form part of a broader, more sustained campaign of related content spanning days, weeks, months or even, in the case of long-running editorial sponsorships, years.

Content items are related in one of two ways:

UNIQUE & RELATED CONTENT



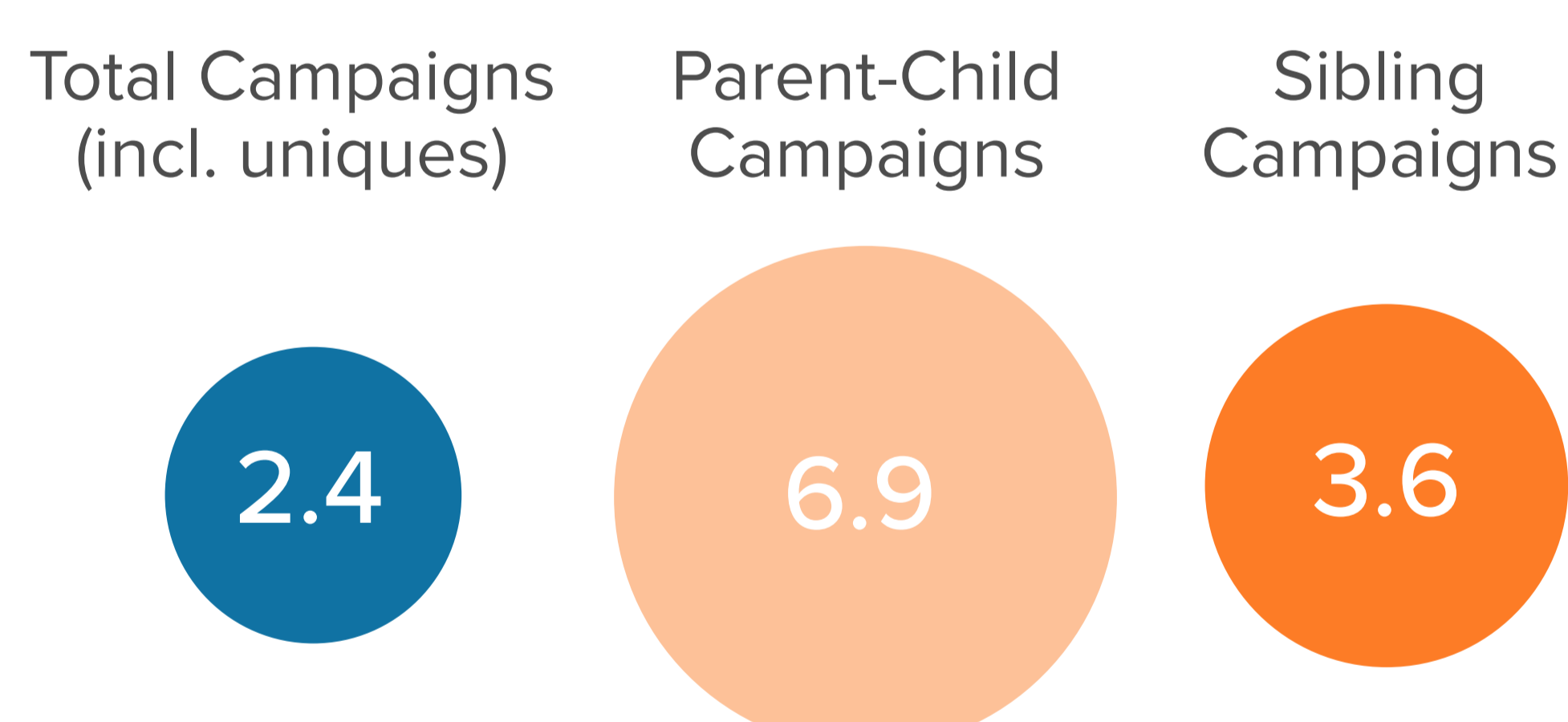
- Three quarters of content items belong to a broader campaign while 1-in-4 are unique, stand-alone items..



- Among related content, in almost two thirds of cases the relationship is sibling-to-sibling as opposed to parent-child.

CAMPAIGN SIZE

(Average # content items per campaign)*



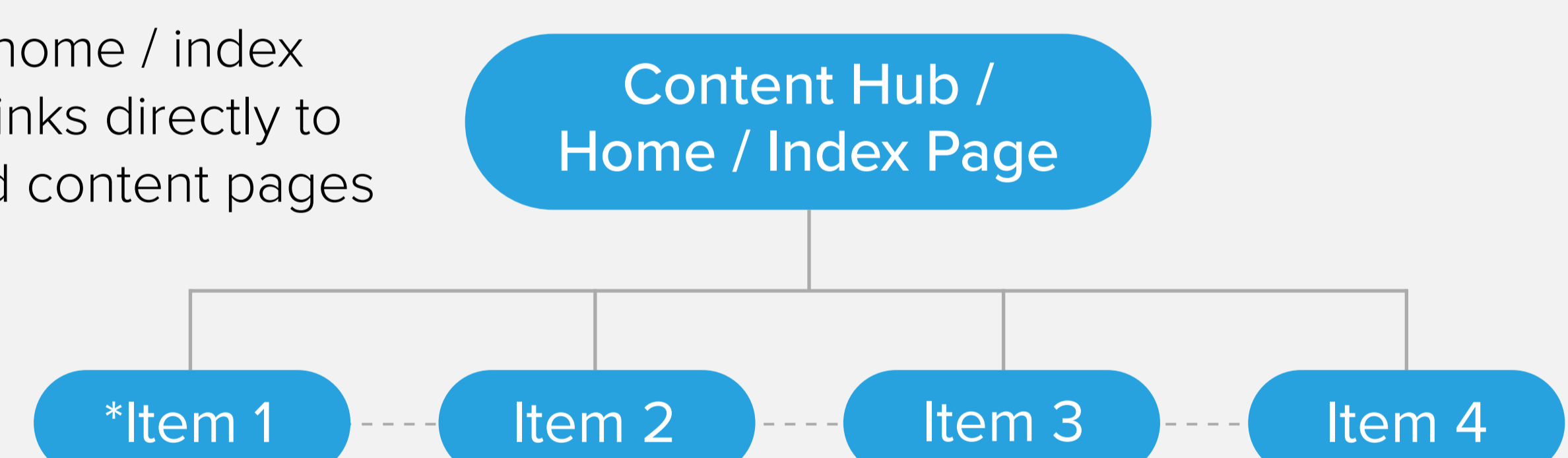
- Parent-Child campaigns tend to be almost twice the size of Sibling campaigns

The most common form of Sibling campaign consists of just 2 items (46% of cases)

**Campaign defined as related content from the same brand on the same publisher*

PARENT-CHILD Campaigns

Hub / home / index page links directly to related content pages

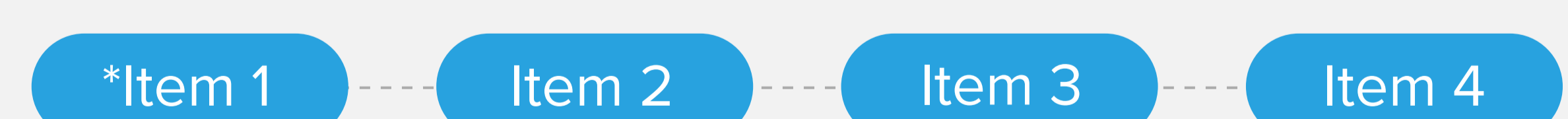


Horizontal navigation between item pages may or may not be enabled.

SIBLING Campaigns

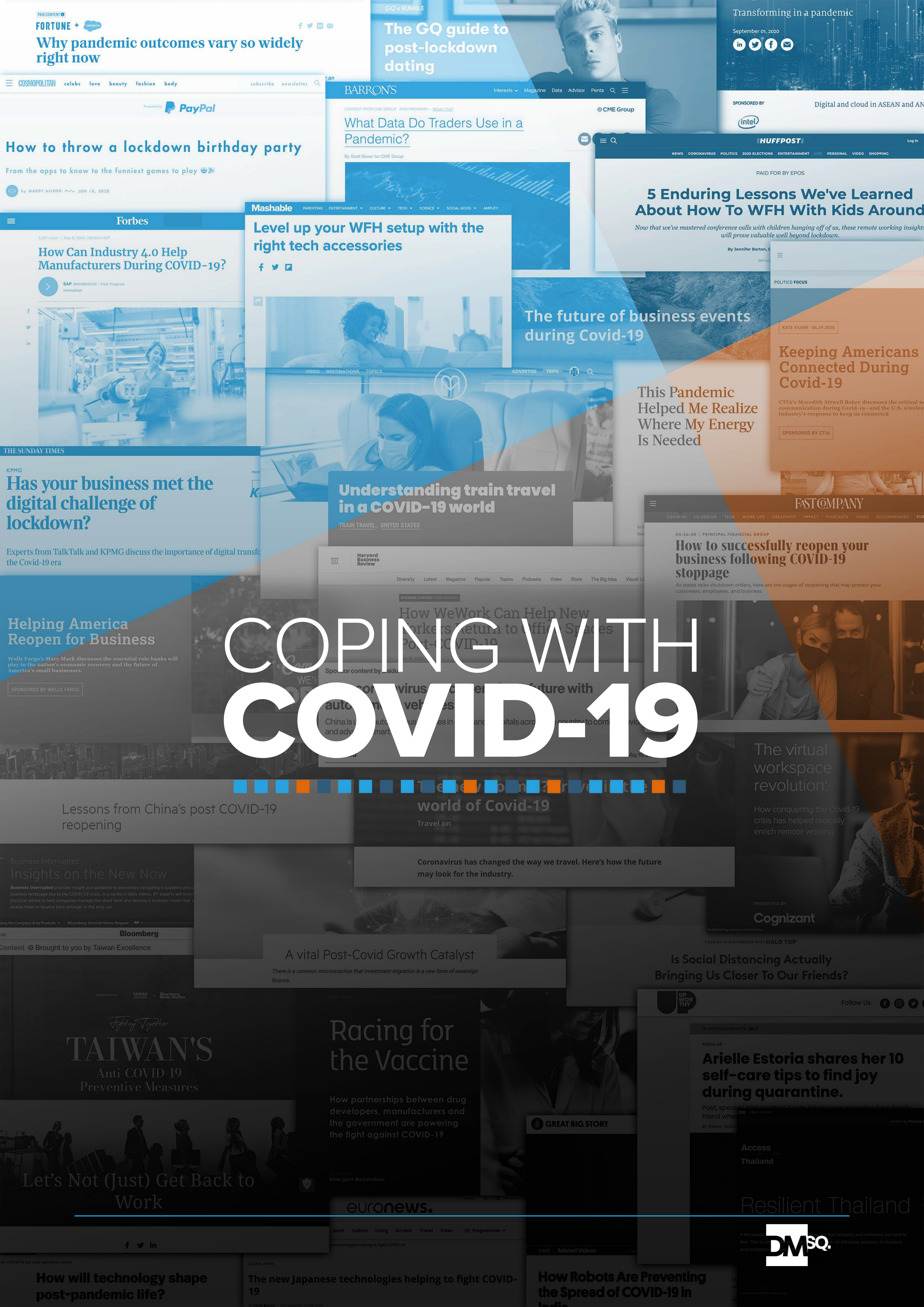
No hub / home / index page.

Items published individually but belong to same campaign



Horizontal navigation between articles may or may not be enabled.

**Items may be ad features, branded articles, branded videos etc. or a mix of types within the same campaign.*



PAID CONTENT

Why pandemic outcomes vary so widely right now

COSMOPOLITAN celebs love beauty fashion body subscribe newsletter

Presented by



How to throw a lockdown birthday party

From the apps to know to the funniest games to play

by MADDY ALFORD JUN 18, 2020

Forbes

3,207 views | Sep 8, 2020, 08:23am EDT

How Can Industry 4.0 Help Manufacturers During COVID-19?

SAP BRANDVOICE | Paid Program Innovation



THE SUNDAY TIMES

KPMG

Has your business met the digital challenge of lockdown?

Experts from TalkTalk and KPMG discuss the importance of digital transformation in the Covid-19 era

Helping America Reopen for Business

Wells Fargo's Mary Mack discusses the essential role banks will play in the nation's economic recovery and the future of America's small businesses.

SPONSORED BY WELLS FARGO

GQ x BUMBLE

The GQ guide to post-lockdown dating

BARRON'S

Interests Magazine Data Advisor Penta Q

What Data Do Traders Use in a Pandemic?

By Scott Bauer for CME Group



Mashable

PARENTING ENTERTAINMENT CULTURE TECH SCIENCE SOCIAL GOOD AMPLIFY

Level up your WFH setup with the right tech accessories

f t i



The future of business events during Covid-19

This Pandemic Helped Me Realize Where My Energy Is Needed

Keeping Americans Connected During Covid-19

CTIA's Meredith Attwell Baker discusses the critical role of communication during Covid-19—and the U.S. wireless industry's response to keep us connected

SPONSORED BY CTIA

FAST COMPANY

How to successfully reopen your business following COVID-19 stoppage

As states relax shutdown orders, here are the stages of reopening that may protect your customers, employees, and business.



COPING WITH COVID-19

Lessons from China's post COVID-19 reopening

How WeWork Can Help New Workers Return to Office Spaces Post-COVID-19

Travel on

Coronavirus has changed the way we travel. Here's how the future may look for the industry.

A vital Post-Covid Growth Catalyst

There is a common misconception that investment migration is a new form of sovereign finance.

Racing for the Vaccine

How partnerships between drug developers, manufacturers and the government are powering the fight against COVID-19

Presented by Emergent BioSolutions

euronews.

Sport Culture Living Sci-tech Travel Video Programmes

Technologies helping to fight COVID-19

GLOBAL JAPAN

The new Japanese technologies helping to fight COVID-19

By Chris Burns | last updated: 27/09/2020

GREAT BIG STORY

Is Social Distancing Actually Bringing Us Closer To Our Friends?

Arielle Estoria shares her 10 self-care tips to find joy during quarantine.

Poet, speaker and creative Arielle Estoria was planning for a family friend when the pandemic hit.

By Simone Scullion

Access Thailand

Resilient Thailand

If the pandemic has taught us anything, it's that reliability and resilience are hard to find. This is why Thailand is an attractive prospect to investors.



How will technology shape post-pandemic life?

How Robots Are Preventing the Spread of COVID-19 in India

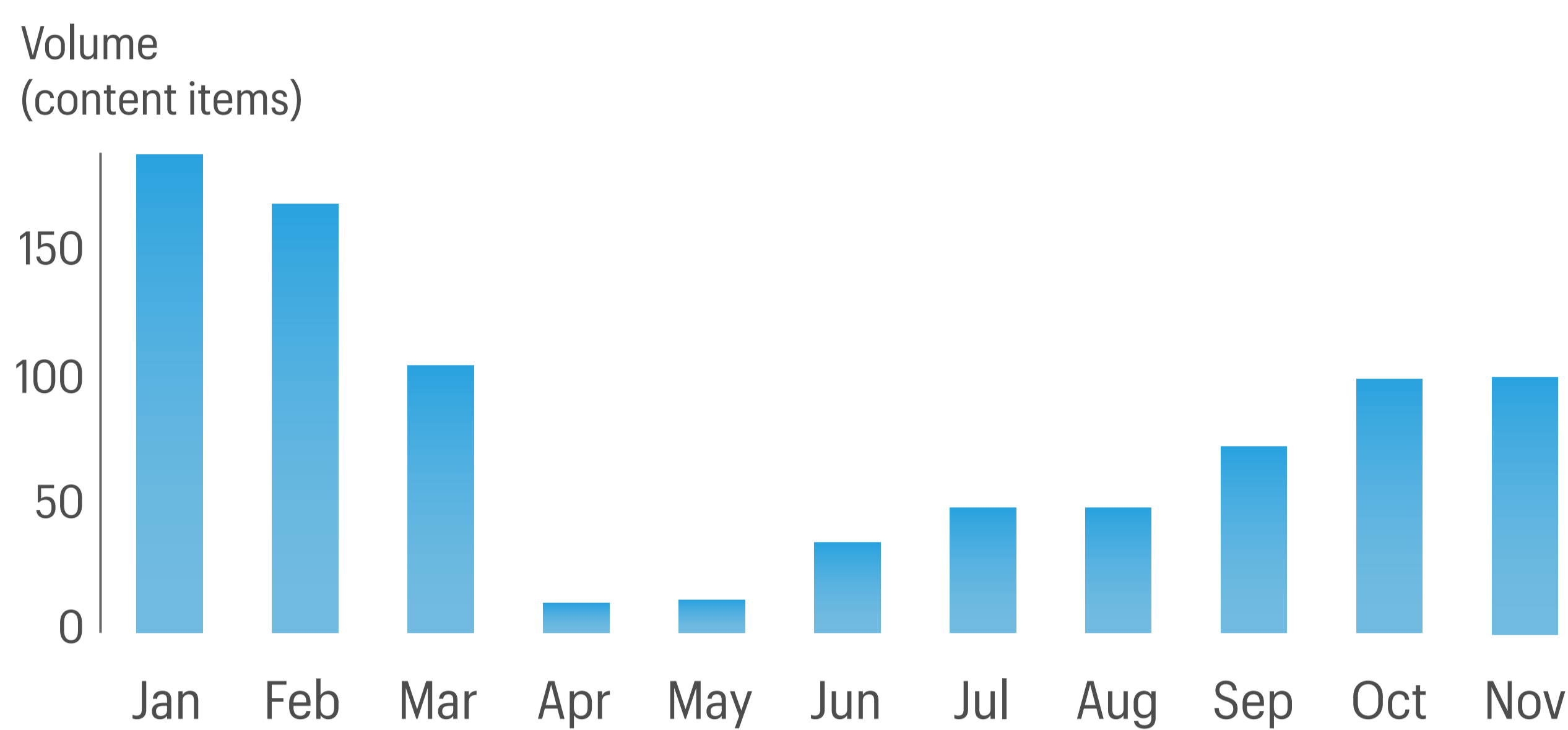


COPING WITH COVID-19

CAMPAIGN ACTIVITY

Branded content has by no means escaped the global upheaval caused by the COVID-19 pandemic. As seen in our [market overview](#), the recovery from the downturn was relatively swift in terms of overall campaign volumes but the situation is more complex at the sectoral level with business remaining uncomfortably quiet for some - most notably the travel sector.

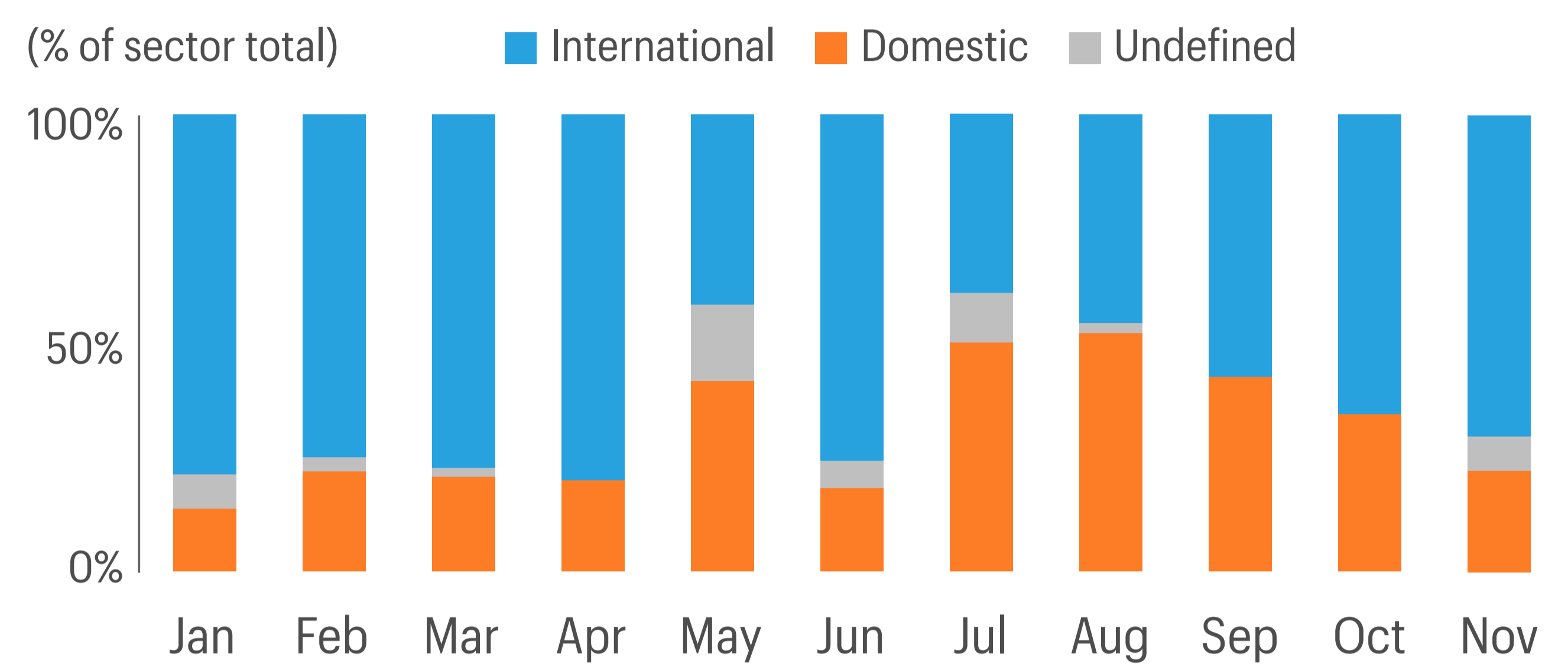
Travel & Tourism Sector: Jan-Nov 2020 Volume Trend



■ Activity almost came to a standstill in April-May 2020 and the recovery is clearly not U-shaped.

International vs. Domestic Tourism

(Jan-Nov 2020)



■ The popularity or necessity of staycations boosted the domestic travel share from May 2020.

RENEWED RELEVANCE

Campaign volumes aside, the pandemic served to underline the relevance, adaptability and importance of branded content for consumer and business-facing brands.

TRAVEL & TOURISM BRANDS	reassured with their COVID safety protocols, abundance of outdoor activities and wellness credentials
BANKING & FINANCE BRANDS	guided small businesses, struggling households and confused investors
TECHNOLOGY BRANDS	underlined their role in enabling WFH, virtual social interaction and rapid digital transformation
BUSINESS & PROFESSIONAL SERVICES BRANDS	advised leaders how to weather the storm, adjust strategies and seize the opportunities
HEALTH & MEDICAL BRANDS	promoted physical and mental well-being and revealed their role in the race for COVID-19 vaccines
RETAIL BRANDS	encouraged us to make the most of lockdown life and to embrace e-commerce and click-n-collect

THEMATIC TRENDS COVID Era vs. Pre-COVID

(increase in % of content with theme; Apr-Nov '20 vs. Apr-Nov '19)

B2C & Total	+918% PANDEMICS & GLOBAL HEALTH ISSUES The topic du jour/week/month/year
	+500% SAFETY & PERSONAL SECURITY Keeping it safe and sanitary at home/work/on vacation
	+81% E-COMMERCE Retail therapy for consumers; vital lifeline for businesses
	+33% WELLNESS & WELLBEING Self-care wisdom and advice for locked-down lifestyles.
B2B	+33% DIVERSITY & INCLUSION New appreciation of D&I in society and in the workforce
	+161% BUSINESS CONCEPTS & TRENDS Need-to-know topics for the 'new rules of business'
	+44% BUSINESS ADVICE How leaders and SMBs can navigate 'the new normal'
	+40% DATA PROTECTION & CYBERSECURITY Mitigating security risks of a remote workforce
	+32% EMPLOYEES & WORKFORCE Managing remote teams and preparing for their return
	+31% BUSINESS STRATEGY & TRANSFORMATION A roadmap for the COVID-era enterprise

COVID AS THE STORY

Peak COVID - the pandemic as the core theme of branded content - was April-May 2020 when the then-fresh pandemic vocabulary of COVID-19, Coronavirus, Lockdown and Social Distancing was often found within branded content article titles. Since then the pandemic steadily receded into the background, replaced by euphemisms such as 'the new normal'. It has become the unspoken context in which we work and (attempt to) play.

As the pandemic moved from central to peripheral it allowed brands to address other issues and challenges that are now more frequently covered than was possible during peak-COVID. Diversity and inclusion, climate change and decarbonization, sustainable finance and broader ESG topics all gained coverage, driven in part by a reappraisal of brand values and brand purpose in the light of the pandemic fallout.



KEY TAKEAWAYS

The introduction to this report described branded content as being under-researched but we hope the intervening pages have contributed to a better understanding of the size, shape and vibrancy of the medium.

- The winds of regulatory change are blowing in the right direction for digital branded content. Data privacy and brand safety concerns can be neutralized when brands align themselves with premium publisher environments and audiences. CONTEXT is queen.
- Advertising features account for half of all monitored content types but the term masks what are often sophisticated immersive and interactive experiences.
- Branded content is ultimately about storytelling and new content analytics such as archetype profiling reveal what lies behind the story. The leading archetype or imperative is for branded content to inform but advising, recommending, inspiring and entertaining are also key for B2C.
- Digital branded content on premium publishers is quantifiably transparent, with clear (often multiple) labels and additional disclaimers.
- Branded content items rarely live in isolation. They belong to larger campaigns for which the industry norm is between 4 and 7 content items per campaign, depending on their structure.
- While building brand awareness is core, digital branded content can also be tasked with mid and lower-funnel marketing objectives, as more than a third of all monitored content attests.
- Branded content cleverly combines a relatively high degree of branding for content items as a whole with lighter touch branding within the storyline itself. I.e. 'Brand focus' is weak or partial in two thirds of cases.
- All forms of marketing activity took a major COVID-related hit in 2020, but branded content rolled with the punches and stayed relevant by quickly finding a new and appropriate voice, tone and messaging for the times.

This adaptability is also evident in branded content being chosen by brands to address other pressing issues, such as diversity and inclusion, racial equality and women's empowerment.
- The travel sector - cruelly curtailed by the pandemic - is in steady recovery mode and is increasingly using branded content to inspire future-dated travel when permitted.
- B2B brands have embraced branded content to the extent that there was no downturn in campaign activity during the depths of the pandemic.

Today's business trends are overwhelmingly digital and technological; hence tech brands and brands offering solutions to business complexity have a great deal to contribute via digital branded content.

Further BC Intel-based insight is available [here](#).

ABOUT BC INTEL



This report is based upon data, analysis and insight derived from BC Intel, a service of DM Squared



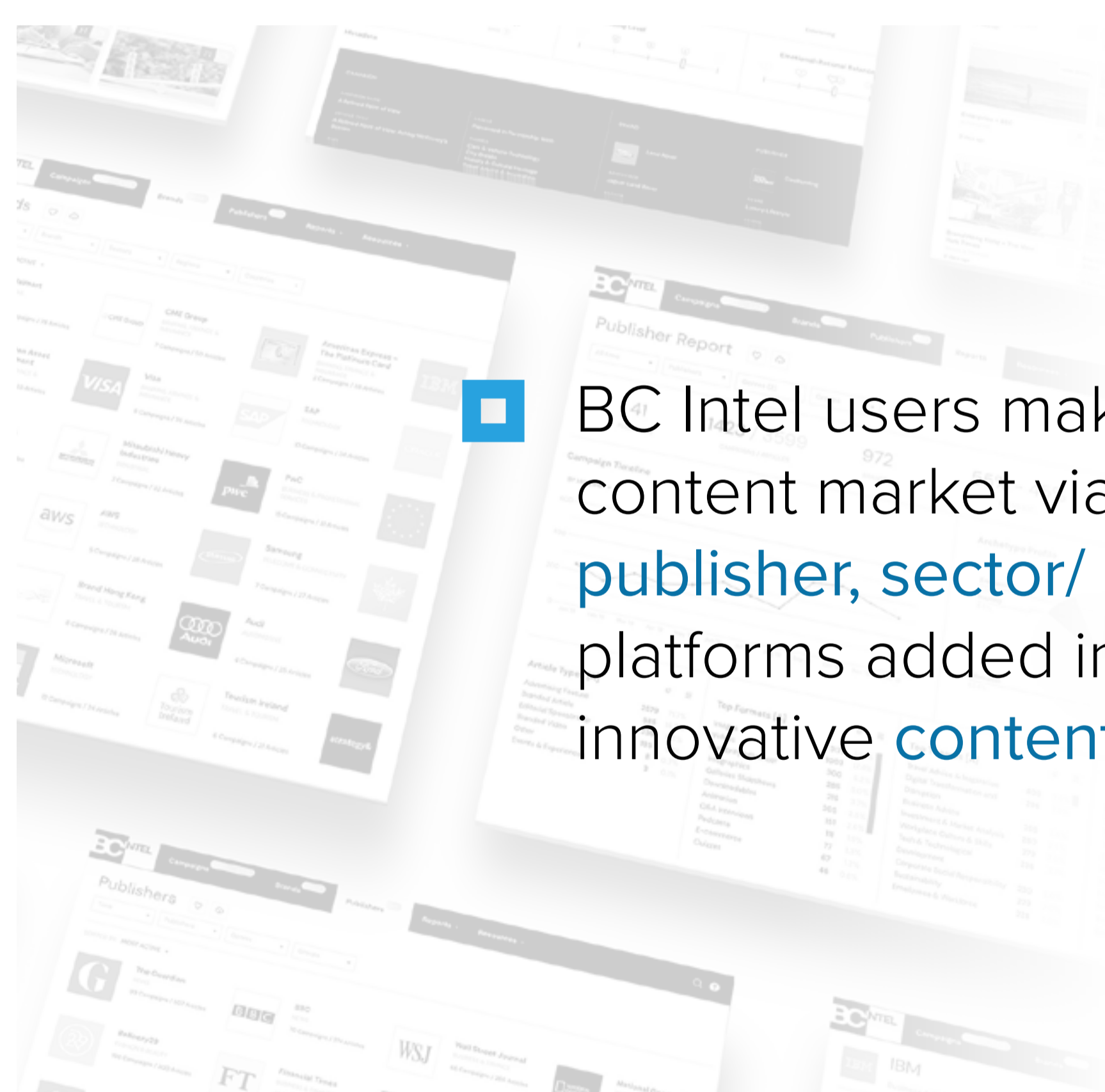
**BRANDED
CONTENT
INTELLIGENCE**

COMPETITIVE INTELLIGENCE
PERFORMANCE MEASURES & BENCHMARKS
CREATIVE INSPIRATION
MARKET INSIGHT

BC Intel identifies, measures and analyses digital branded content across premium English-language publishers.

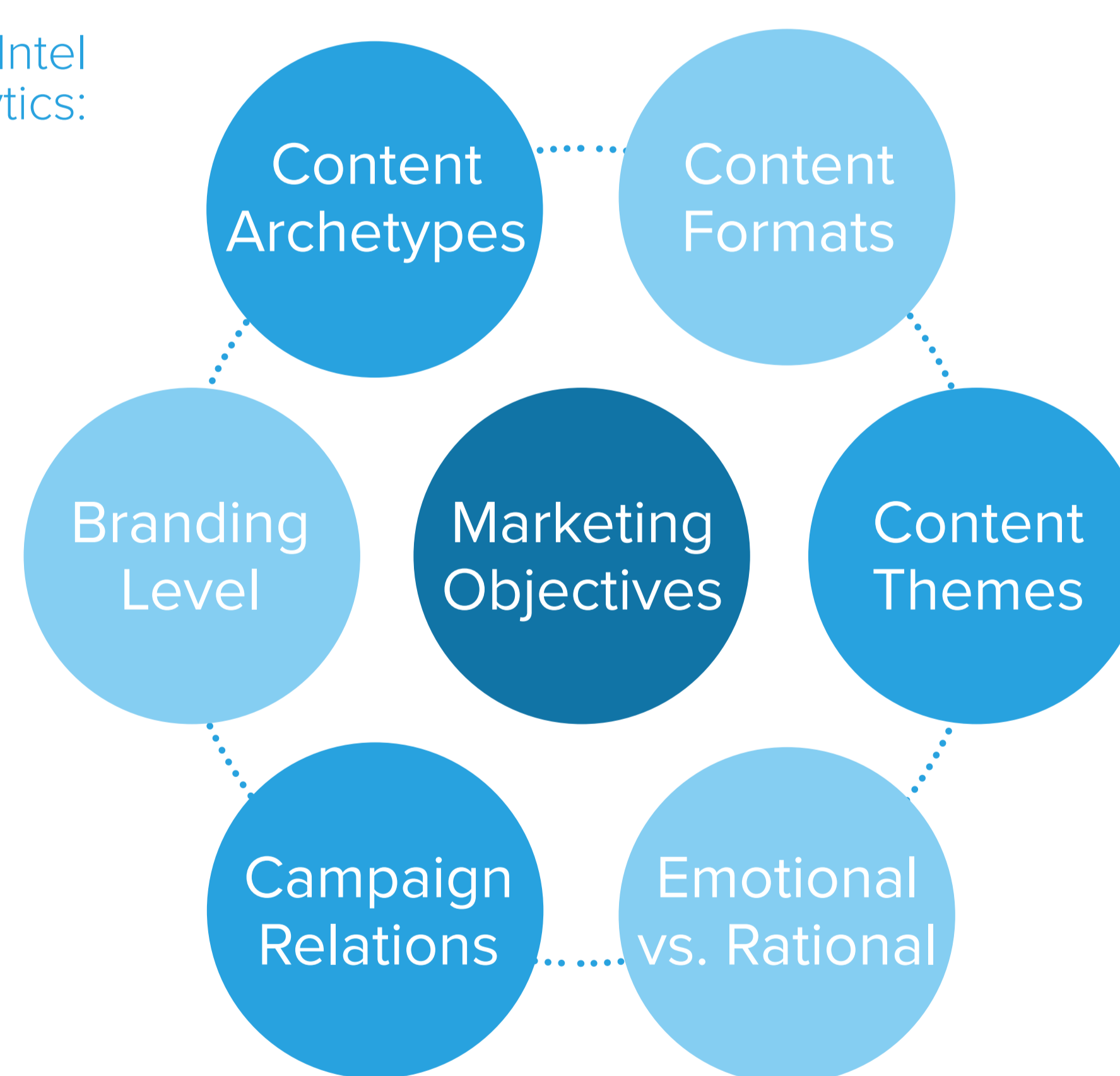
The resulting data plus benchmarks and campaign visuals are continually updated with newly published campaigns and made available to subscribers via the BC Intel web application.

The app's intuitive UI and powerful content alert function makes light work of keeping teams informed and ahead of the curve, whether creating, planning, buying or selling branded content.

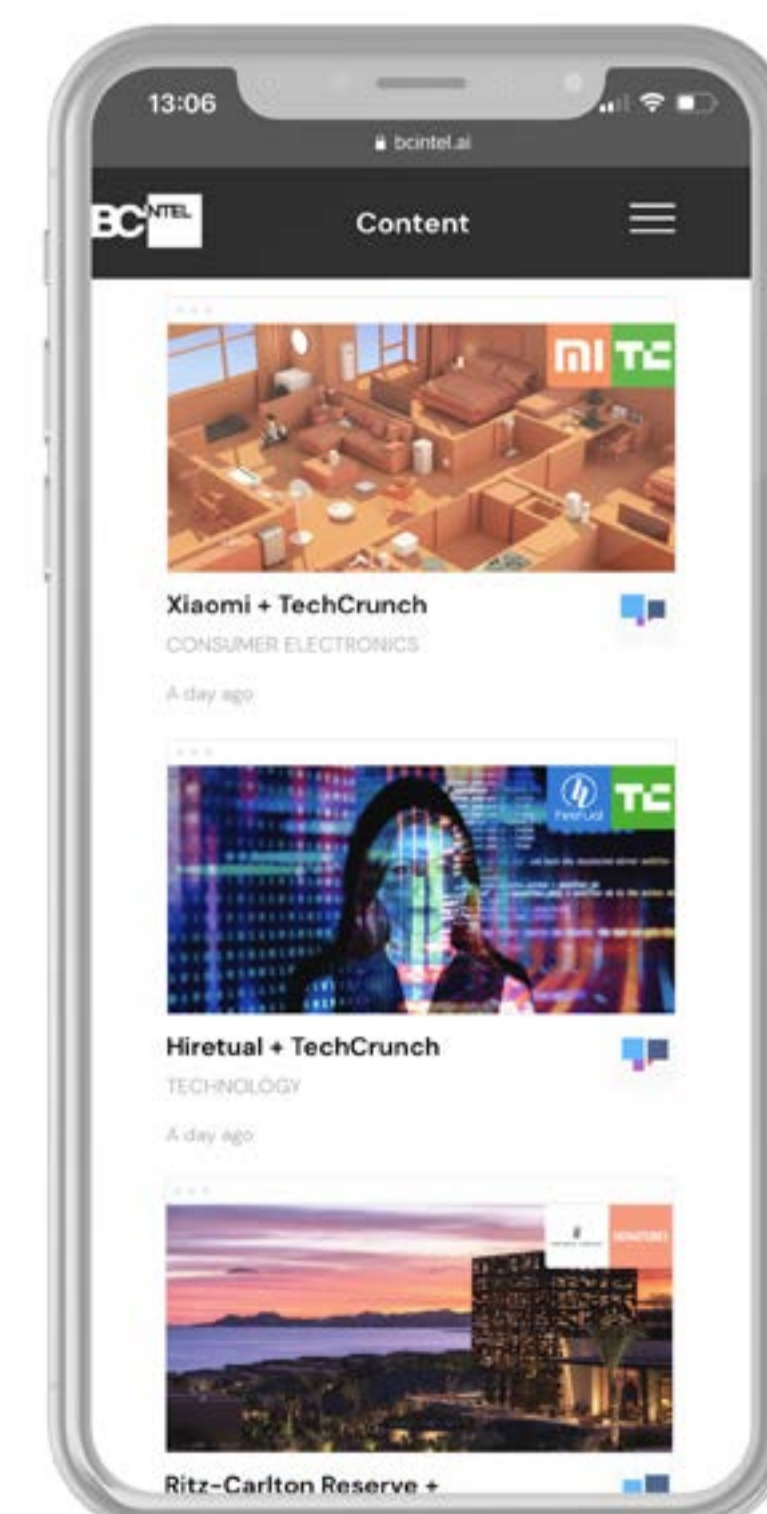


- BC Intel users make sense of the digital branded content market via analysis by **brand, advertiser, publisher, sector/ sub-sector** and **platform** (social platforms added in Q1 2021), as well as via innovative **content analytics**, including...

Selected BC Intel content analytics:



Contact DM Squared to learn more about how BC Intel benefits publishers, agencies and brands.





ABOUT DM SQUARED

DM Squared is on a mission to bring new intelligence and fresh insight to all stakeholders in the media, marketing and advertising disciplines.

We are a team of talented technologists, data wizards and thought leaders and have forged strong partnerships with leading academic institutions.

DM Squared is a blend of relevant industry experience and hard-earned research and analytics credentials, combined with proprietary data models built with the very latest AI and machine learning techniques.



**DIDIER
MORMESSE**
Co-Founder & CEO



**DUNCAN
MORRIS**
Co-Founder & COO

Sharing this vision are co-founders Didier and Duncan - veterans of the media, advertising and market research world - both of whom headed international research and insight functions in some of the world's leading media and marketing intelligence companies.



CONTACT US

contact@dmsq.io
www.dmsq.io | www.bcintel.ai

DM Squared SAS
49 Rue de Pontieu, 75008 Paris, France
Siret # : 841 059 652 00013, RCS Paris