YOU ARE YOUR CONTENT
Being Here, Now
State of Content 2017
“We shape our tools and thereafter our tools shape us”

- attributed to Marshall McLuhan
The Digital Revolution Remade Us

The digital revolution remade us. Tonight’s dinner table conversation is held accountable by the fact-checkers in our pockets. We don’t pick a restaurant, or make a purchase, without consulting the reviews and recommendations of peers and experts. The most arcane subjects are within the easy reach of a swipe and a tap. Individually, these digitally-enabled experiences are useful, often delightful. In total, however, the sudden emergence of unlimited information is profound, often overwhelming.

With little time to reflect, we’ve adapted to a state of boundless connectivity. Our thoughts and feelings are more intertwined with one another than ever before. Content provides the bridge between our personal experience and the wide world around us. The content that we create is our voice. By giving more of ourselves, we make ripples that can become waves.

Content is the chorus of human voices that animate the touchpoints spreading all around us, expanding from our phones to our cars, our home appliances, our digital assistants and beyond. It’s hard to overstate its impact. With the flow of content, markets rise and fall, elections are won and lost, relationships are built and reputations are destroyed.

After enduring marketing’s half-truths for generations, the field has leveled. As old hierarchies are disrupted, there is chaos, furious competition and opportunities we’ve only begun to imagine. In the new paradigm trust and empathy are the ultimate commodities.

To be present for others today, is to be certain our content embodies our best self.
Our Second Global Survey

Accenture Interactive surveyed more than 1000 executives, seeking their insights about the evolving content environment. We asked these business leaders, the majority of whom are the key decision-makers within global enterprises, to take stock of their strategies, to assess the strengths and weaknesses of their organizations, and to elucidate the trends that are defining the future.

The individuals we invited to participate have diverse backgrounds and resumes. They are based in fourteen countries and represent eighteen industries, from retail to banking and pharmaceuticals to entertainment. What they hold in common is the experience of leading at a moment when their businesses, industries, and global markets are undergoing a pivotal transformation. Nearly half of the participants oversee organizations whose marketing budgets exceed $250 million dollars annually. More than fifty are responsible for one billion dollars or more in marketing resources. Almost all have made significant investments in content.

In an era of liquid expectations, the content delivered as part of those experiences competes for customer attention like never before, and the distinction between content for external or customer consumption versus content for internal or employee and stakeholder consumption has begun to disappear. The net effect of these trends—combined with an increase in the number and importance of social channels, and the impact of personalization—means that companies need to create extraordinary amounts of content at higher and higher levels of quality.

Donna Tuths

Survey Population and Methodology

The online survey was conducted by Accenture among a total of 1,082 business executives in July 2016. The overall margin of error is +/- 3 percentage points at the midpoint of the 95 percent confidence level.

1,082 Executives
14 Countries
18 Industries

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<th>Countries Represented</th>
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The virtual world is always awake

Being Everywhere

Content has become as ubiquitous as the air we breathe and the water we drink. The four million search inquiries we send to Google every minute reflect our insatiable hunger for answers and ideas. Instantaneous access to a virtual universe of information, entertainment and more has accelerated the way we live. Today, the average American compresses thirty-one hours of activity into a single day. We are all doing more in order to be present everywhere.

By 2020, some thirty-four billion devices will be online, a number equivalent to almost four connections for every man, woman, and child on the planet. Enterprises prepared to engage 24/7 are poised to seize a historic opportunity.

The virtual world is always awake
At a pivotal moment when the competition to engage consumers through content has intensified, key decision-makers should be focused on articulating a larger sense of purpose and connecting with people on a personal basis. Instead, these leaders are preoccupied with the minutiae required simply to keep up with the necessary levels of production.

The operational hurdles confounding executives prevent many from seeing the proverbial forest through the trees. Only 40 percent of these leaders strongly agree that they clearly understand the goals of their content; thus, fewer than half believe that their investments truly match those goals. To achieve efficient production at the necessary scale, it is critical for organizations to align their investments with a clear understanding of desired outcomes.

In the absence of such a strong sense of purpose, content becomes an operational grind. In 2016, more than half of the survey participants said they spend the majority of their time on operational details associated with content. Overall, executives in the field feel even less prepared to manage enormous amounts of content than in the previous year.

To be present everywhere, all the time, starts with unprecedented investments in content. Our 2017 survey shows that the percentage of organizations producing enormous volumes of content has doubled since our previous study. On average, major companies are creating over one million digital assets per year. The executives we spoke with collectively control marketing budgets totaling more than 500 million dollars, and they are allocating up to half of those resources to build relationships with consumers through content.

The average American compresses thirty-one hours of activity into a single day.

34 BILLION
In 2014 the number of mobile users surpassed those accessing the internet on their desktops
By 2020, some 34 billion devices will be online

250M
Enterprises spend between 150M and 250M on content related activities per year

2X
The percentage of companies producing large amounts of content has doubled since our previous survey

Content is the next big chasm that marketers have to face and overcome. The pain point that all marketers are struggling with now is, where do I get the content engine? In a much more dynamic and hyper-targeted world—where personalization is key—how do I create hundreds of different installations of content and maintain relevancy?

Head of Digital Content
Home Repair

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Identity and Culture

Content revolutionized marketing, now it’s reinventing everything else

As we continue to probe content issues with business leaders, the notion of identity arises again and again. Perhaps the phenomenon is best illustrated at the level of the individual: entering your name into a search engine might reveal a rich portrait, a record of past and present, preferences and associations, even intimate thoughts and feelings. In a flash, digital content can create the richest representation of self imaginable—and so, as individuals, we have learned to be thoughtful about what we post and share digitally. Simply put: to know my content is to know me.

Some organizations embody themselves so vividly in the content they produce that their audience develops a true affinity with them. These are the companies we call Content-First, and they are redefining the consumer relationship and driving disruption with content-led business models. Such a content-led approach comes from the very top, and requires commitment to key capabilities.

It’s no longer about promotion, it’s about expressing your identity, and building relationships. In a world that is not push anymore—it’s all about the pull of attraction and being your best self. Companies have to get real about what that means to them.

Donna Tuths

“The true problem brought by the FDA is the need for meaning, for a ‘natural’ solution to the problem of meaning.”
nearly 80% of those we surveyed believe that the content they produce must convey everything they want people to know about their businesses.

more than 3/4 of respondents recognize that the success of their content depends on the quality of the initial creative brief, yet fewer than one quarter feel accountable for ensuring that quality.

Content-First Companies

Evolution in the use of content is enabling entirely new business models. Content-first companies are disrupting industries from travel to eyewear and athletics to entertainment. Virtualized experiences of a product or a service provide a novel means of differentiation, and a flexible testing ground for new offerings. Organizations first identified the power of a content-led approach to enable marketers. Once a fringe movement, now over 76 percent of companies we surveyed are exploring Content Marketing. A rule-of-thumb: what separates content marketing from traditional advertising is a shift from transactional topics of product and service to topics of interest and audience delight. The goal is not driving sales, but growing deeper relationships. Reflecting a growing awareness of the power and purpose of content, nearly 80 percent of those we surveyed believe that the content they produce must convey everything they want people to know about their businesses. Another factor keeping content at the center of organizational concern is the continued decline of brick-and-mortar activity, and a corresponding increase in digital commerce. Accenture research states nearly half of eTails (46%) are seeing their online sales growing more than 11%, and 86% will be expanding their eCommerce activities over the next 12 months.

Content is the new brick-and-mortar, the setting where so much customer experience takes place. You have to create the capability in yourself to be able to produce your own voice. It has to be your own, a reflection of the organization’s true self. So, this is creating challenges for many companies that relied on agencies in the past to provide that content. Today you are in danger of sounding promotional, inauthentic, and uninviting.

Donna Tuths

Own Your Voice

Content-led organizations have discovered they must own the most essential aspects of their content; they cannot entrust them to transient agency partners. The rise of the in-house studio model points to the need to build and control a company’s voice internally. It can’t be provided by an agency; it has to come from within. When asked to explain the reason they are able to create high quality content, respondents consistently cited talent: having both the right level of creative talent aligned to content creation, and having that talent reside in-house. What did respondents cite as the #1 barrier to creating high quality content? Lack of in-house talent. In past years’ business leaders could be expected to cite barriers of budget or technology. Today, creating effective content requires investing in an internal team. 76 percent of respondents said they will be increasingly leveraging in-house talent in the next two years. Successful content is most often rooted in a common culture that can only be lived by an organization’s members.
Traditionally, the weight has fallen heavily on marketing to generate new creative ideas. In order for a company’s content to fully represent its voice, mission, and vision, that dependence on marketing should lessen, and employees elsewhere in the organization, who live those core values every day, should be called upon to offer input. Genuine content can be difficult to attain. Companies should utilize every resource at their disposal, engaging the entire organization to tell the right stories with messages that matter.

2X
CEOs were twice as likely as members of their senior management teams to find that content meets their goals.

Nearly all of the CEOs that we surveyed believe that their companies are already representing themselves well through their content.

**CEO Imperative**

Last year we reported that a major shift was underway in marketing culture, with 90 percent of respondents stating that a chief executive should be responsible for content strategy. More than a third of those surveyed said that the CEO should have direct oversight. This year, we specifically surveyed CEOs to understand their attitudes. Nearly all who participated in our study reaffirmed their commitment to content, seeing it as the primary way to articulate their organization’s missions.

While this revolution in content leadership is progressing, some players lag behind. Many organizations still rely too heavily on traditional marketing departments to generate creative ideas and outside agencies to develop content strategy. Our study also revealed differing perceptions at different levels within organizations. CEO respondents offered far more optimistic assessments of content than those elsewhere in a company. For example, CEOs were twice as likely as members of their senior management teams to find that content meets their goals. Meanwhile, fewer than a third of employees strongly agree that the content their organizations produce accurately reflects the culture and character of their organizations.

Why are CEOs so focused on content? Content is bigger than marketing; it’s the voice of the company’s mission; it can alter the fate of an enterprise. According to Accenture Research, “CEOs are on the hot seat to show shareholders new sources of revenue. And as traditional sources of revenue become ever more elusive, CEOs are increasingly seeking disruptive growth. In fact, 44 percent of CEOs surveyed feel that disruptive growth is very important to the overall growth agenda.”

The ongoing innovation in content is disruptive, and disruption itself has emerged as critical profit source.

**Where do new ideas originate?**

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<thead>
<tr>
<th>Percentage</th>
<th>Source of Ideas</th>
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<tbody>
<tr>
<td>62%</td>
<td>Marketing</td>
</tr>
<tr>
<td>51%</td>
<td>Product Development</td>
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<tr>
<td>50%</td>
<td>Users/Consumers/Customer</td>
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<td>33%</td>
<td>Agency or Partner</td>
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<td>29%</td>
<td>Sales</td>
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Where do you look for the next big idea for your content?
Think Distribution

In today’s decentralized media space, issues of distribution are more complex, and more important, than ever.

It’s hard to imagine, less than 20 years ago there were a few nationally broadcast television stations, enough monthly magazines to fill a newsstand, and a dwindling number of radio stations and newspapers, constrained to a largely regional focus. Today, the old players have either struggled to reinvent themselves, or perished. In their place an incredible living network has emerged. Social platforms have democratized content; truly anybody can be a channel. Snapchat launched less than five years ago and Periscope isn’t even two years old. We’re on the cusp of the VR (virtual reality) era. Strange new media formats have sprung to life, and the path to audience engagement is no longer a straight line.

These are uncharted waters. Our clients’ needs have shifted as digital becomes dominant and social becomes an imperative—they struggle as their traditional agency partners do not have the digital and technical DNA to keep up in this rush of innovation. Clients are looking for more partners who are willing and able to master these new formats quickly and help brands to experiment and learn. There is no ‘wait and see’ in these markets today.

Donna Tuths
It’s no surprise then, 82% of respondents describe placement as key to driving business outcomes. In fact, almost three-quarters of organizations invest the majority of their budgets (100–250M), up to 70%, on paid placement. But in the complex landscape, only 24% of organizations feel very prepared to activate new distribution points as they arise. Large sums mean risk, and only a third of the leaders we spoke with feel capable of making critical distribution-related decisions without consulting an external partner to help navigate strategic and operational challenges.

More than just posing new challenges, the radical possibilities presented by digital technology means distribution itself has become an important area of creative innovation. Organizations can stay relevant by meeting audiences on emergent platforms, or even leading them to new ones. Worldwide, 26 percent of marketers report the inclusion of VR in their marketing mix in 2017. Today, where you are, is who you are.

Some technologies will be a fleeting memory. Others will change the world. New platforms, channels and formats require significant investment and new types of mastery—what drives engagement on one, might flop on another. It’s not practical, nor desirable, to commit equally to every innovation. Determining the right distribution models requires experimentation, and knowing your audience—but most importantly, an effective approach to distribution must be informed by a content program defined by a clear and consistent sense of purpose and identity.

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In a fiercely competitive environment where every efficiency matters, such a high percentage point could be alarming. However, it also reflects a commitment to experimentation, a willingness to go out on a limb in an attempt to reach consumers in new ways. One organization’s waste is another’s rough draft for content that may be ahead of its time.

Our study found that 20% of all content produced is never distributed.
The average person is exposed to 577 marketing messages every day. In Accenture’s recent survey of consumers, we found that more than 80 percent either ignore traditional ads or block them out while browsing online. Despite the increasing proliferation of marketing messages, consumers effectively filter out all but the most compelling content—and then consume the material they love obsessively. Indeed, more than 70 percent of our consumer survey participants reported feeling open to more content, especially if it was tailored to their tastes.

You can be dismissed by the mere tap of a finger. In a pull world, reaching your audience becomes a battle of attraction. There is a saying that the mind will rationalize what the heart desires. Understanding the heart is at the core of architecting attraction. That is a very complex thing. It is about subtle human connections, accessibility and openness—which seem to relate to authenticity—being real. That is what brands now have to achieve if they want to reach their audience.

Donna Tuths
Quality of content is not defined on my terms... Quality of content as tested and interpreted by the consumer... helping enable them to go from where they are to where they want to go. That is quality.

Head of Ecommerce, Digital Marketing and Channel Innovation Strategy
Retail Company

Three-quarters of those who participated in our leadership study recognize that the single most important driver of brand engagement is quality. What is quality? It's not necessarily about production value. It can't be purchased and it can't be faked. Consumers know it when they see it. It's a trait that exists across platforms and channels, in digital formats and in analogue space. While "Quality" defies universal definitions, our research shows that relevance, authenticity, and credibility are the top drivers. Questions of authenticity and credibility, in particular, speak to the importance of trust. A loud noise may attract attention, but only trust sustains an audience, and builds relationships.


This openness extends to content produced by brands. 84 percent of the executives we surveyed affirmed the importance of content in shaping the brand experience—and consumers don’t discriminate against sponsored experiences, provided they pertain to their interests and satisfy expectations of quality. The qualities which earn credibility in the eyes of consumers include: demonstrated expertise, ethical transparency and innovation. Brands have huge opportunities to connect with consumers, but the quality bar is high.

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Authenticity and credibility are the top drivers of quality

84% affirmed the importance of content in delivering experiences to those that come into contact with their brand


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Content Engagement Framework

While the varieties of content are limitless, in our quest to understand what makes content work, we’ve developed a matrix view to help describe the essential relationship between content and consumer. The best content meets complex needs, thus it can be mapped to quadrant intersections.

This analytical framework was created based on our consumer research and sentiment to provide useful perspective in developing content goals.

Practical and concise content presented simply, targets habit-forming behavior.

**EXAMPLE**
A lighthearted video with instructions for creating simple indulgent treats is an example of content that’s both delightful and informative.

In our Video Consumer survey, participants listed Education as the second most valued type of content, followed closely by Entertainment.

Informative content that empowers, targets functional value.

**EXAMPLE**
A tenured media company who objectively presents information like world news and current events.

Accenture research showed 57 percent said that expertise was the most important driver of a brand’s credibility.

Usefulness 
**It helps me.**

Entertainment 
**It delights me.**

Presentation of idealized experience, targets an emotional response.

**EXAMPLE**
A highly produced, national campaign that inspired girls to challenge limited gender-based expectations.

Accenture research showed that entertaining content ranked second in the types of content consumers were most likely to share with friends and family.

Aspirational 
**It elevates me.**

Expression of similar values, targets connection.

**EXAMPLE**
Lifestyle bloggers and YouTube stars who share their lives and experiences in their own voice.

Our Video Consumer Survey respondents reported being drawn to brands that advocate for causes they believe in.

Trust 
**I can believe in this.**

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### New Questions, New Answers

The virtualized world is presenting opportunities for alternative models.

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### How are Companies Responding?

High-performing companies are transforming themselves, looking for new sources, inspiration, and partners to address the transforming landscape.

#### Content-led Models

- **77%** agree that the most innovative companies are investing in content-rich activities
- **62%** consider themselves to be a content-driven organization

#### Taking Back the Message

- **76%** say they are increasingly leveraging in-house talent to create content in the next 2 years
- **77%** believe the quality of their content is directly correlated to their creative brief

#### Seeking New Forms of Creation

- **74%** Leverage Existing Content
- **72%** Content Templates
- **62%** User Generated Content
- **55%** Content Automation
- **47%** Crowdsourcing
- **19%** Robo-writers

#### What Challenges Remain?

With new models come challenges that organizations will have to overcome over time.

#### Driving Adoption

- **1/4** Only one quarter of respondents are committed to change management, education, and gaining buy-in when rolling out transformational changes to content creation

#### Accountability

- **25%** Less than 25% feel accountable for the quality of the creative brief
- **29%** Only 29% strongly agree that their content is consistent in style and tone across channels

#### Strategy & Governance

- **27%** Only 27% strongly agree that their organization has a fully functioning governance model with forums, policies, and procedures under which all content activities and resources are managed
- **1/3** Less than 1/3 strongly agree that their content strategy is inclusive of both marketing and non-marketing content (i.e., sales, customer service, learning, communication, collaboration)
Our relationship to content has been transformed. So many aspects of our lives, big and small, are lived online. We use digital tools for practical tasks, like shopping and banking, but also for more personal matters, like starting relationships or looking for answers to questions we are too shy to ask our doctors. From education to recreation, one is hard-pressed to identify aspects of modern life not changed by digital content. This study continues our efforts to understand this shifting paradigm, and to help organizations respond.

Ubiquity is the new normal. Sites and microsites, apps, social platforms, the blogosphere, an unrecognizable media landscape, an internet of things—to be everywhere is expensive and complicated, but getting content right could not be more critical. With the virtualization of nearly everything, your audience’s primary exposure to your organization is now through the content you share. This applies to customers, and prospects, and also, critically, to employees and recruits.
Audiences are no longer crowded around a handful of channels. The web is radically decentralized, and new platforms regularly displace incumbents. Distributing content is not just an operational challenge, but an area where the most competitive companies are innovating, following their audiences closely, and even leading them to new channels. Keeping up with all of these changes is exhausting at best, and impossible for some.

Technology has brought the end of passive viewing habits, allowing audiences to deftly avoid irrelevant content. Yet audiences have an insatiable appetite for content that matters, and are deeply passionate about the content that matters most. While there is no universal path to relevance, it begins by connecting content to an organization’s most essential goals, kneading into the culture, and prizing the trust of an audience as a precious resource.

Content must be a vital expression of an organization’s purpose, and true to its lifeblood. Content is how the organization expresses itself. In this hyper-connected age, You Are Your Content, it is literally the voice of your organization. And so, it is no surprise that organizations are beginning to want to own that voice, rather than entrust it to others, building new capabilities within the enterprise, and establishing stewardship at the most senior levels of the organization.
About Accenture Interactive

Accenture Interactive helps the world’s leading brands drive superior marketing performance across the full omni-channel customer experience. Accenture Interactive offers integrated, industrialized and industry-driven digital transformation and marketing solutions.

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Donna Tuths, the author of this study, runs Accenture Interactive’s content business with nearly 10,000 practitioners worldwide. She is a recognized thought leader in the field, a frequent public speaker, and the founder of Accenture’s Content Studio based in the Soho neighborhood of New York City.

Accenture Interactive

Content Studio

We believe a content studio should reflect the best aspects of an organization, and the most human. In our home studio we stay focused on innovation, research, creative strategy, product development and emerging best practices in the field. We are focused on helping our clients work through their own specific content challenges. Our facility supports full multimedia production, and new, collaborative models for delivering content in an omni-channel world—honoring our commitment to the role of content within the enterprise. Annually, we publish the State of Content Survey, bringing insights from over 1000 senior executives, from 18 countries across 14 industries. Throughout the year we conduct and share with the public research on varied topics of interest to us.

About Accenture

Accenture is a leading global professional services company, providing a broad range of services and solutions in strategy, consulting, digital, technology and operations. Combining unmatched experience and specialized skills across more than 40 industries and all business functions—underpinned by the world’s largest delivery network—Accenture works at the intersection of business and technology to help clients improve their performance and create sustainable value for their stakeholders. With approximately 373,000 people serving clients in more than 120 countries, Accenture drives innovation to improve the way the world works and lives. Visit us at www.accenture.com.