The Global Review
of Data-Driven Marketing
and Advertising

OCTOBER 2014
Foreword

It’s an exciting time to be “data-driven.”

Technology is maturing, information is available in abundance and a new corporate mandate—create actionable insights from data, big and small, that drive value for brands and consumers alike—has propelled the marketer into a powerful new role as an agent for change.

With that in mind, we’re delighted to welcome you to this inaugural edition of The Global Review of Data-Driven Marketing and Advertising. We hope you can use this research to benchmark your data-driven marketing initiatives, allocate budgets in line with global best practices and develop strategies for using data in meaningful, responsible and consumer-friendly ways.

A product of unprecedented worldwide collaboration—and the most ambitious research effort ever undertaken by its presenting partners, GlobalDMA and Winterberry Group—this report would not be possible if not for the contributions of thousands of industry stakeholders around the world. Most notably, these include our two global sponsors, Accenture Digital and MediaMath, as well as the 17 independent trade associations (and more than 3,000 data-driven marketing and advertising professionals) who offered their insights and support to the research initiative. To all of you, we offer our most sincere thanks.

As delighted as we are to share this research with marketers worldwide, we’re more excited about what’s to come: a year of education, advocacy and sharing—leveraging this research as the foundation of a global conversation about data and its evolving role in advertising and marketing.

Likewise, we’re looking forward to future editions of The Global Review, when we’ll finally have what has always been so elusive to the industry: insightful and credible historical data about how marketers and advertisers are leveraging data as drivers of innovation and growth.

In the meantime, we look forward to your feedback about our flagship effort. Please don’t hesitate to contact us with your questions, comments and suggestions. We hope you find this report useful and relevant to your work.

Valentina Carnevali
GDMA PROJECT LEADER AND CEO, DMA ITALIA

Jonathan Margulies
MANAGING DIRECTOR, WINTERBERRY GROUP LLC

Jodie Sangster
CHAIR, GLOBALDMA AND CEO, ADMA—THE ASSOCIATION FOR DATA-DRIVEN MARKETING & ADVERTISING (AUSTRALIA)
Acknowledgements

This research undertaking would not have been possible without the contributions of more than 3,000 thought leaders—including survey panelists, sponsors, presenting trade associations and reviewers representing all segments of the advertising, marketing, media and technology industries across 17 global markets—Argentina, Australia, Belgium, Brazil, France, Germany, Hungary, India, Ireland, Italy, the Netherlands, New Zealand, Singapore, South Africa, Sweden, the United Kingdom and the United States. In particular, GlobalDMA and Winterberry Group are grateful to our global sponsors for their generous support of this initiative:

Additionally, we extend our deepest appreciation to the advertisers, marketers, service providers and technology developers who contributed their time, insights and enthusiasm in support of our research, as well as the GlobalDMA member associations that brought our research initiative to their respective markets. They include:
Executive Summary

Everywhere around the globe, across virtually all vertical markets and business functions, one marketing truth has emerged as universally clear: data matters. It enables insight into customers and prospects, and it’s a tool for targeting messages, offers and content that drive response. But data’s contribution is even more substantial; it represents a means of learning about changing markets, of bridging that gap between “traditional” and “digital” in the media mix, of evolving toward a “customer-centric” approach to doing business that backs up promise with action.

Indeed, data is a precious asset—representing a customer relationship (or potential relationship) that must be both nurtured and safeguarded if it is to flourish over time. The practice of data-driven marketing and advertising (“DDMA”), then, is a means of putting that asset to work: leveraging a wide range of delivery channels, as well as creative content that’s appropriate to each, in order to establish and grow relationships that benefit marketer and consumer alike.

Across each of 17 different global markets, our panel of data-driven marketers, technologists and service providers echoed those themes with overwhelming resonance. Though they come from different countries (working across various vertical markets, and representing disparate constituencies of the marketing economy), they were loud and clear in their consensus on a number of key issues:

- **Data matters:** More than 80 percent of worldwide panelists said that data is affirmatively important to the deployment of their advertising and marketing efforts, and even more—a whopping 92.2 percent—said that it’s likely to play an increasingly important role in the future.

- **Borders matter less:** Across 17 markets, panelists were resoundingly consistent in their embrace of data as a core pillar of advertising and marketing—and even more deeply aligned when projecting how that contribution is likely to grow over time. When asked to assess the role of data in their promotional efforts on a 1-to-5 scale, for example (with 5 indicating that data currently plays a “critical” role), no individual market indexed at more than 4.73 (Sweden) or less than 4.08 (Italy). Response was even more enthusiastic—and spread across a more narrow range—when panelists were asked to weigh in on whether data is growing more important to their efforts, indexing from a whopping 4.85 (Hungary) to an almost-as-whopping 4.43 (Argentina).

- **It’s a bull market:** More than three quarters (77.4 percent) of global respondents said they’re confident in the practice of DDMA and its prospects for future growth. Across individual markets, confidence is relatively consistent, though emerging-economy panelists reported a higher degree of optimism than their peers in larger and more mature markets. On an index basis, India (4.48), Brazil (4.39) and South Africa (4.36) led the pack in terms of confidence (with panelists asked to rate their sentiment on a 1-to-5 scale, with 5 indicating “extreme” confidence in DDMA).

- **Marketing budgets are on the rise:** Globally, 63.2 percent of panelists reported that their spending on data-driven marketing and advertising grew over the last year—with another 10 percent (73.5 percent of the panel) expecting that budgets will rise yet again over the next year.
Data is digital. And digital is data: The five promotional channels that captured the most new or expanded budget over the last year—including website/e-commerce content, social media, mobile, paid search engine marketing and online display advertising—are all native to the digital world. (That should perhaps not be surprising, given that digital channels also posted the most substantial performance improvements over the past year when benchmarked against previous returns, with mobile, paid search engine marketing and website/e-commerce content delivering the greatest performance improvements on a global basis.) Looking toward the coming year, digital channels are expected to lead the pack once again—with the mobile and social channels expected to pace all other vehicles in their command of new expenditures.

Managing information requires a focus on... everything: The parallel challenges of navigating more (and more complex) data, media channels, customer requirements and performance expectations mean that marketers, technologists and services providers are working to intensify their efforts across virtually all functional components of the DDMA practice. Digital execution, data management, audience analytics, automation technology and creative development all emerged as top priorities for DDMAers.

It’s all about customers: A majority of global panelists (52.7 percent) said that “a demand to deliver more relevant communications/be more ‘customer-centric’” is among the most important factors driving their investment in DDMA, outpacing all other relevant factors. Panelists were less united in their sentiment about the impact of potential investment obstacles, though one—“limited availability of necessary budget”—was cited as a meaningful factor by 47.1 percent of panelists.

“Consumer-friendly” is just good business: On a global basis, panelists said that government regulation isn’t playing a substantially burdensome role in their everyday DDMA initiatives—perhaps underscoring the likelihood that, virtually everywhere, marketers have embedded the key tenants of most regulatory guidelines—including protections on the responsible use of data and adherence to basic consumer preferences—into their everyday business practices. On a global basis, less than a quarter of panelists (24.8 percent) said that regulation is affirmatively limiting their data-driven marketing and advertising efforts, indexing that concern at 2.94 on a 1-to-5 scale (with 5 indicating regulation “substantially limits” their efforts). The most heavily impacted markets include those—such as Germany (indexed at a 3.50) and France (3.29)—that are subject to the European Union’s Data Protection Directive, while practitioners in the United States (2.61) and New Zealand (2.69) are less affected, on the whole, by regulatory oversight.

More money, more people, more know-how: Though panelists were of various opinions when asked what resources would serve to improve their performance, a significant number of respondents said that expanded budgets (43.4 percent), deeper pools of experienced talent (42.1 percent) and improved organizational structures (33.0 percent) would most substantially advance their efforts to leverage data in support of marketing and advertising.
Key Global Findings

PANEL:
3,053 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY – SEPTEMBER 2014

* Not all respondents answered every question

This report explores data-driven marketing and advertising practices across 17 global markets.

Produced and published by GlobalDMA and Winterberry Group—and with the sponsorship of Accenture Digital and MediaMath—the effort was made possible by support from GlobalDMA member organizations around the world, including: amdia (Argentina), ADMA (Australia), bdma (Belgium), ABEMD (Brazil), Adelem (France), DDV (Germany), DIMSZ (Hungary), DMAi (India), IDMA (Ireland), DMA Italia, DDMA (Netherlands), Marketing Association (New Zealand), DMAS (Singapore), DMASA (South Africa), SWEDMA (Sweden), DMA (United Kingdom) and DMA (United States).

The report’s findings are based on the results of an online survey of more than 3,000 marketers, advertisers, service providers, technologists and publishers—deployed by each of the 17 presenting associations in their respective markets between July and September 2014.
**PANEL COMPOSITION**

How would you describe your principal role/business focus?

- **MARKETER/ADVERTISER:** 41.6%
- **PUBLISHER/MEDIA:** 4.6% (focused on selling advertising)
- **PROVIDER OF MARKETING SERVICES:** 33.1% (including data and agency services)
- **DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY:** 5.5%
- **OTHER:** 15.3%

**EXPERIENCE**

How many years of experience do you have with marketing and/or advertising?

Please consider your current job and past professional roles that may apply.

- **< 1 year:** 3.1%
- **1-5 years:** 18.9%
- **6-10 years:** 20.3%
- **11-15 years:** 19.4%
- **16-25 years:** 23.0%
- **> 25 years:** 13.0%

**INDUSTRY REPRESENTATION**

Within which of the following vertical markets are your professional efforts most intensively concentrated?

Displaying panelists’ “top three” responses:

- **Automotive**
- **Business-to-business services (“B2B”)**
- **Consumer goods (“FMCG” or “CPG”)**
- **Entertainment, media and/or publishing**
- **Financial services (banking, credit cards, investments, etc.)**
- **Government**
- **Healthcare and/or pharmaceuticals**
- **Insurance**
- **Manufacturing**
- **Not-for-profit/charities**
- **Retail—predominately “brick-and-mortar” stores**
- **Retail—predominately catalog and/or e-commerce**
- **Technology**
- **Telecommunications**
- **Travel and hospitality**
- **Utilities**
- **Other**
What is “DDMA”? How is it practiced?

- With overwhelming consistency—and across a solid majority, some 68.5 percent, of panelists—marketing practitioners across each of 17 global markets characterized their practice of data-driven marketing and advertising (“DDMA”) primarily through the lens of targeting: the deployment of carefully-crafted offers and messages to select members of an audience population. Approximately half of global panelists also said they focus on leveraging data in support of business or product strategies (52.4 percent) and almost as many (49.4) look to data as a means of linking and improving the customer experience across media touchpoints.

- Over the past year, global practitioners increased spending on all digital DDMA media, with the website and e-commerce content, social media and mobile channels capturing the largest investment gains on average. Looking ahead, global panelists said they expect these channels, as well as digital display advertising, to continue capturing the most new and expanded budget over the coming year.

- Spending on direct mail—the well-established and perhaps most “traditional” DDMA delivery vehicle—declined globally over the past year and was the only channel among 10 to post lower aggregate investment. On an index basis, global panelists assigned direct mail a score of 2.91 (on a 1-to-5 scale, with 5 indicating spending increased “significantly”). That said, panelists expect the pace of that decline to flatten out over the coming year, with an expected aggregate spending index score of 2.99.

- Across key DDMA program and campaign execution functions, global panelists said they increased spending across the board; digital execution and the core capabilities linked to the utilization of data—including database management and analytics—captured the most increased spending while “traditional campaign execution” tallied more modest budget gains. Looking ahead, panelists said they expect to invest more in all digital capabilities, with campaign execution and data analytics again capturing the largest gains.
DDMA DEFINED

“My practice of data-driven marketing and advertising is characterized by a focus on…”

- Audience analytics/measurement: 44.4%
- Data-driven strategy and/or product development: 52.4%
- Media mix optimization: 31.8%
- Optimization of customer experience (across traditional and/or digital platforms): 49.4%
- Predictive analytics/segmentation: 43.8%
- Programmatic media buying (e.g. real-time bidding): 11.7%
- Targeting of offers, messages and creative content: 68.5%
- Other: 3.9%
SPENDING ON DDMA CHANNELS

How has your (or your clients’) spending on each of the following data-driven marketing and advertising channels changed over the past year? How do you expect spending to change over the next year?

<table>
<thead>
<tr>
<th>Channel</th>
<th>The past year</th>
<th>Expected over the coming year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Addressable TV</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digital display advertising*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digital out-of-home</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct mail</td>
<td></td>
<td></td>
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<tr>
<td>Email</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mobile apps, messaging and user experience</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paid search/keywords (SEM)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social media engagement (apps, gamification, customer service, etc.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teleservices/contact centers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Website/e-commerce (content and user experience)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices
SPENDING ON DDMA FUNCTIONS

How has your (or your clients’) spending on each of the following data-driven marketing and advertising campaign execution functions changed over the past year? How do you expect spending to change over the next year?

- **Data compilation, sourcing and/or brokerage**
  - Past year: 3.88
  - Expected: 3.77

- **Data/database management (CRM and “DMP” technology)**
  - Past year: 3.99
  - Expected: 3.77

- **Digital campaign execution**
  - Past year: 3.53
  - Expected: 3.85

- **Marketing automation technology**
  - Past year: 3.91
  - Expected: 3.78

- **Predictive analytics, modeling and segmentation**
  - Past year: 3.97
  - Expected: 3.76

- **Traditional campaign execution**
  - Past year: 3.05
  - Expected: 3.06

- **Audience analytics, measurement and attribution**
  - Past year: 4.01
  - Expected: 3.88

- **Creative and content development**
  - Past year: 3.77
  - Expected: 3.88

- **Customer contact, support and call center**
  - Past year: 3.54
  - Expected: 3.95

- **Data compilation, sourcing and/or brokerage**
  - Past year: 3.88
  - Expected: 3.77

- **Data/database management (CRM and “DMP” technology)**
  - Past year: 3.99
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- **Digital campaign execution**
  - Past year: 3.53
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- **Predictive analytics, modeling and segmentation**
  - Past year: 3.97
  - Expected: 3.76

- **Traditional campaign execution**
  - Past year: 3.05
  - Expected: 3.06
How does data impact marketing and advertising performance?

- Survey feedback were fulsome in its endorsement of data as an important driver of marketing and advertising efforts; 80.4 percent of worldwide panelists said data is affirmatively important to their current activities and more than half, 57.1 percent, cited data as a “critical” asset in the same respect.

- Looking ahead, panelists reported that they expect data’s role to expand even further; 92.2 percent of global practitioners, on average, said data is growing more important to advertising and marketing efforts and over three-quarters (76.7 percent) indicated data is growing “substantially” more important.

- Compared to their global peers, DDMA practitioners in Sweden, South Africa, the United Kingdom, Belgium and the United States said that data is a more important element of their typical marketing activities than the average reported globally, providing index scores ranging from 4.50 to 4.73 on a 1-to-5 scale (with 5 indicating data is considered “critical” to marketing and advertising efforts). On the opposite end of the spectrum, panelists from Italy, New Zealand and France said that data is comparatively less important to their efforts today than their global peers (assigning index scores ranging between 4.08 and 4.19 in response to the same question).

- Looking ahead, panelists across all markets indicated that data’s contribution is expanding. Global panelists assigned forward-looking scores ranging between 4.43 and 4.85 when asked about data’s changing role with respect to marketing and advertising efforts (again using a 1-to-5 scale, with 5 indicating data is growing “substantially” more important).

- In tandem with their strong enthusiasm for data and its expanding impact, a vast majority of global practitioners—77.4 percent—said they are confident in the data-driven approach, assigning a global “confidence index” of 4.24 on a 1-to-5 scale (with 5 indicating “extreme” confidence in the practice of DDMA and its growth prospects). Though reported confidence is high across most markets, levels vary: panelists from India, Brazil, South Africa and the United States expressed the most confidence (tallying respective index scores ranging between 4.33 and 4.48), while panelists in France and Italy expressed less confidence (reporting index scores of 3.97 and 3.85, respectively).

- Reflecting that generally positive outlook, 63.2 percent of DDMA practitioners around the world said they increased spending on DDMA over the past year and even more (73.5 percent in total) said they expect to grow that investment further over the coming year.

- Though panelists reported that the performance of all their addressable DDMA media channels improved over the past year, digital channels scored the largest performance gains—with most impressive gains posted by the mobile, paid search and website/e-commerce content channels. Traditional direct mail performance improved for practitioners as well, albeit at more moderate rate.
IMPORTANCE OF DATA

How important is data to your (or your clients’) current marketing and advertising efforts?

Thinking toward the future, how do you believe data’s role is changing with respect to your (or your clients’) marketing and advertising efforts?

<table>
<thead>
<tr>
<th>Importance Level</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not at all important</td>
<td>1.3%</td>
</tr>
<tr>
<td>Growing substantially more important</td>
<td>92.2%</td>
</tr>
<tr>
<td>Growing substantially less important</td>
<td>1.7%</td>
</tr>
<tr>
<td>Critical</td>
<td>80.4%</td>
</tr>
<tr>
<td>Not changing</td>
<td>0.6%</td>
</tr>
<tr>
<td>Somewhat important</td>
<td>15.8%</td>
</tr>
<tr>
<td>Growing substantially more important</td>
<td>76.7%</td>
</tr>
<tr>
<td>Critical</td>
<td>57.1%</td>
</tr>
<tr>
<td>Not changing</td>
<td>4.5%</td>
</tr>
<tr>
<td>Growing substantially less important</td>
<td>23.3%</td>
</tr>
<tr>
<td>Not at all important</td>
<td>2.0%</td>
</tr>
</tbody>
</table>

Index score: 4.66

Index score: 4.34
IMPORTANCE OF DATA BY COUNTRY

In general, how important is data to your (or your clients’) marketing and advertising efforts?

Data is critical 5.0
Data is somewhat important 4.0
Data is not at all important 1.0

Argentina 4.33
Australia 4.32
Belgium 4.27
Brazil 4.19
France 4.39
Germany 4.45
Hungary 4.29
India 4.38
Ireland 4.28
Italy 4.39
Netherlands 4.30
New Zealand 4.13
Singapore 4.22
South Africa 4.62
Sweden 4.73
United Kingdom 4.61
United States 4.50
**Changing Role of Data by Country**

Thinking toward the future, how do you believe data’s role is changing with respect to your (or your clients’) marketing and advertising efforts?

- Data is growing substantially more important
- The role of data is not changing at all
- Data is growing substantially less important

<table>
<thead>
<tr>
<th>Country</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Argentina</td>
<td>4.43</td>
</tr>
<tr>
<td>Australia</td>
<td>4.68</td>
</tr>
<tr>
<td>Belgium</td>
<td>4.57</td>
</tr>
<tr>
<td>Brazil</td>
<td>4.66</td>
</tr>
<tr>
<td>France</td>
<td>4.53</td>
</tr>
<tr>
<td>Germany</td>
<td>4.85</td>
</tr>
<tr>
<td>Hungary</td>
<td>4.72</td>
</tr>
<tr>
<td>India</td>
<td>4.78</td>
</tr>
<tr>
<td>Ireland</td>
<td>4.61</td>
</tr>
<tr>
<td>Italy</td>
<td>4.83</td>
</tr>
<tr>
<td>Netherlands</td>
<td>4.63</td>
</tr>
<tr>
<td>New Zealand</td>
<td>4.79</td>
</tr>
<tr>
<td>Singapore</td>
<td>4.83</td>
</tr>
<tr>
<td>South Africa</td>
<td>4.87</td>
</tr>
<tr>
<td>Sweden</td>
<td>4.67</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>4.67</td>
</tr>
<tr>
<td>United States</td>
<td>4.59</td>
</tr>
</tbody>
</table>
CONFIDENCE IN DDMA

Thinking in general about your current business activities and conditions within your respective marketplace, how confident are you in the value of “data-driven marketing and advertising” and its prospects for future growth?

Index score: 4.24

Not at all confident: 0.9%
Somewhat confident: 19.6%
Extremely confident: 48.2%

77.4%
CONFIDENCE BY COUNTRY

Thinking in general about your current business activities and conditions within your respective marketplace, how confident are you in the value of “data-driven marketing and advertising” and its prospects for future growth?

- Argentina: 4.20
- Australia: 4.30
- Belgium: 4.18
- Brazil: 4.39
- France: 4.20
- Germany: 4.25
- Hungary: 4.48
- India: 4.07
- Ireland: 3.86
- Italy: 4.18
- Netherlands: 4.13
- New Zealand: 4.07
- Singapore: 4.10
- South Africa: 4.36
- Sweden: 4.07
- United Kingdom: 4.10
- United States: 4.33
DDMA EXPENDITURES

How has your (or your clients’) spending on data-driven marketing and advertising changed over the past year? How do you expect your (or your clients’) spending on data-driven marketing will change next year?

- **Decreased/Likely to decrease significantly**
  - Past year: 2.7%
  - Expected over the coming year: 1.3%

- **No change**
  - Past year: 3.9%
  - Expected over the coming year: 2.5%

- **Increased/Likely to increase significantly**
  - Past year: 16.5%
  - Expected over the coming year: 43.8%

- **Likely to increase**
  - Past year: 24.7%
  - Expected over the coming year: 39.5%

- **Increased significantly**
  - Past year: 23.7%
  - Expected over the coming year: 29.7%

- **Increased/Likely to increase significantly**
  - Expected over the coming year: 63.2%

Index score: 3.82 for the past year, 4.04 for the coming year.
### CHANNEL PERFORMANCE

Thinking about the results generated by each of your (or your clients’) data-driven marketing and advertising channels, how has the performance of each of the following changed over the past year?

<table>
<thead>
<tr>
<th>Channel</th>
<th>Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Addressable TV</td>
<td>3.17</td>
</tr>
<tr>
<td>Digital display advertising</td>
<td>3.88</td>
</tr>
<tr>
<td>Digital out-of-home</td>
<td>3.49</td>
</tr>
<tr>
<td>Direct mail</td>
<td>3.11</td>
</tr>
<tr>
<td>Email</td>
<td>3.22</td>
</tr>
<tr>
<td>Mobile apps, messaging</td>
<td>3.68</td>
</tr>
<tr>
<td>Paid search/keywords (SEM)</td>
<td>3.80</td>
</tr>
<tr>
<td>Social media engagement</td>
<td>3.69</td>
</tr>
<tr>
<td>Teleservices/contact centers</td>
<td>3.56</td>
</tr>
<tr>
<td>Website/e-commerce (content and user experience)</td>
<td>3.76</td>
</tr>
</tbody>
</table>

* Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices
What’s driving the practice of DDMA? What’s inhibiting it?

• More than anything else, global panelists said their DDMA efforts are driven by two motivations: a desire to expand “customer-centricity” (or know more about customers and interact with them more relevantly), and by a desire to maximize the impact of related marketing spending.

• Across global markets panelists were overwhelmingly united in their sentiment that more budget would help advance their practices. Panelists in several markets also mentioned inefficient business processes, poor understanding of DDMA and its related benefits and a lack of talent as gates to improved performance.

• By and large, regulatory barriers on DDMA—limiting, for example, practitioners’ ability to collect customer data or setting high standards for affirmative consumer “opt-in”—are not substantially limiting the practice; only 24.8 percent of global panelists said that this kind of oversight actively inhibits their DDMA activities. And the severity of that impact, where it exists, is relatively modest as well; on a 1-to-5 scale (with 5 indicating that regulation “substantially” limits DDMA activity), worldwide panelists assigned regulatory barriers a relatively low index of 2.94. Within individual markets, panelists in Germany and France indicated they are most encumbered by regulation, assigning regulatory barriers index scores of 3.50 and 3.29, respectively. Panelists in the United States and New Zealand, by contrast, were least bothered by regulation, assigning the lowest relative index scores of 2.61 and 2.67.

* Item was only asked in: Argentina, Belgium, Brazil, France, Germany, Italy, South Africa, United Kingdom and United States
### Factors Driving DDMA

Which of the following factors, if any, are most responsible for driving your (or your clients’) investment in data-driven marketing and advertising?

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>A desire to maximize effectiveness/efficiency of marketing investments</td>
<td>49.3%</td>
</tr>
<tr>
<td>Competitive pressures in our marketplace</td>
<td>18.6%</td>
</tr>
<tr>
<td>Demand to deliver more relevant communications to customers/be more “customer-centric”</td>
<td>52.7%</td>
</tr>
<tr>
<td>Diminished performance of mass media channels</td>
<td>11.4%</td>
</tr>
<tr>
<td>General desire to understand more about customers/prospects</td>
<td>33.2%</td>
</tr>
<tr>
<td>General pressure to activate a “Big Data” strategy</td>
<td>8.2%</td>
</tr>
<tr>
<td>Improved understanding/deployment of data analytics*</td>
<td>9.2%</td>
</tr>
<tr>
<td>Improved usefulness/availability of advertising and marketing technology</td>
<td>18.9%</td>
</tr>
<tr>
<td>Mandate from our company/client leadership</td>
<td>6.6%</td>
</tr>
<tr>
<td>Need to “cut through the clutter” of competitive advertising and media</td>
<td>14.3%</td>
</tr>
<tr>
<td>Need to align with consumer preference for digital media</td>
<td>19.9%</td>
</tr>
<tr>
<td>The growing availability of audience data</td>
<td>24.2%</td>
</tr>
<tr>
<td>Something else</td>
<td>1.5%</td>
</tr>
<tr>
<td>Not at all sure</td>
<td>2.3%</td>
</tr>
<tr>
<td>Nothing</td>
<td>1.1%</td>
</tr>
</tbody>
</table>

* Item was only asked in: Argentina, Belgium, Brazil, France, Germany, Italy, South Africa, United Kingdom and United States
FACTORS INHIBITING DDMA

Which of the following factors, if any, are most responsible for inhibiting your (or your clients”) investment in data-driven marketing and advertising?

- Cultural barriers: 10.5%
- General economic conditions in our marketplace: 15.8%
- Insufficient talent/staffing to drive initiatives: 29.0%
- Legacy importance of mass media channels: 14.8%
- Limited availability of necessary budget: 47.1%
- Limited availability/addressability of audience data: 19.1%
- Limited availability/usefulness of advertising and marketing technology: 8.7%
- Outmoded and/or inappropriate internal business processes to support efforts: 31.2%
- Poor understanding of “data-driven marketing and advertising” and its contribution: 30.4%
- Regulatory barriers: 13.1%
- Resistance from company leadership/marketing stakeholders: 14.2%
- Not at all sure: 4.4%
- Nothing: 5.4%

IMPACT OF REGULATION

To what extent are regulatory barriers in your marketplace (e.g. limits on access to data, requirements for affirmative consumer opt-in to marketing communications, etc.) actively limiting your ability to pursue data-driven marketing and advertising initiatives?

- Regulation does not limit DDMA activity at all: 15.0%
- Somewhat limits: 40.3%
- Substantially limits: 24.8%
- Regulation substantially limits DDMA activity: 13.0%
- Nothing: 11.7%
IMPACT OF REGULATION BY COUNTRY

To what extent are regulatory barriers in your marketplace (e.g. limits on access to data, requirements for affirmative consumer opt-in to marketing communications, etc.) actively limiting your ability to pursue data-driven marketing and advertising initiatives?

Regulation does not limit DDMA activity at all

Regulation substantially limits DDMA activity

Somewhat limits

Argentina: 2.99
Australia: 2.81
Belgium: 2.77
Brazil: 3.07
France: 3.29
Germany: 3.27
Hungary: 2.88
India: 2.98
Ireland: 2.69
Italy: 3.27
Netherlands: 3.10
New Zealand: 2.67
Singapore: 2.85
South Africa: 3.05
Sweden: 2.88
United Kingdom: 2.74
United States: 2.61
What do practitioners need to derive greater value from DDMA?

- In addition to more funding, better and more experienced talent and improved organizational processes, panelists around the globe mentioned better integration between technologies as something that would meaningfully help them advance their DDMA efforts.

- Similarly, when thinking about future hiring and the required skill sets their DDMA organizations will need to prosper over the next three years, many panelists around the world said they will look for practitioners with data analytics and modeling experience, as well as experience leveraging marketing data technology and related tools.

REQUIRED RESOURCES

Which of the following resources would most significantly advance your (or your clients’) efforts to generate value from data-driven marketing and advertising efforts?

- Access to more/better audience data: 24.8%
- Better integration between technologies: 31.7%
- Better support from our business/strategic advisors: 11.3%
- Better support from our creative/campaign advisors: 11.9%
- Improved data governance principles and processes: 14.0%
- Improved internal organizational structures: 33.0%
- Improved technology: 25.9%
- More budget allocation: 43.4%
- More experienced/knowledgeable talent: 42.1%
- More/better education around best practices: 20.7%
- Something else: 2.4%
- Not at all sure: 2.9%
- Nothing: 2.6%
REQUIRED SKILLS

Thinking about your ongoing staffing and talent development efforts, which of the following skill sets represent your most significant priorities for investment and/or enrichment over the next three years?

- Ability to leverage emerging marketing and advertising technologies
- Creative and/or content development abilities
- Digital production skills
- Familiarity with data modeling/predictive analytics
- Familiarity with reporting, measurement and/or attribution techniques
- General experience with digital and/or direct marketing
- Heightened general educational/professional background
- Language skills
- Process management/optimization skills
- Social media management skills
- Supplier management skills
- Something else
- Not at all sure

Displaying panelists’ “top three” responses

- 37.8%
- 28.4%
- 15.0%
- 40.0%
- 29.4%
- 48.1%
- 12.1%
- 4.8%
- 19.4%
- 21.1%
- 4.6%
- 2.3%
- 4.2%
GlobalDMA is an organisation that represents, supports and unites marketing associations from around the globe that focus on data-driven marketing. It promotes worldwide initiatives aimed at providing marketers with global trend information, thought leadership and know-how on data-driven marketing across all sectors, disciplines and channels.

Twenty-seven marketing associations are currently part of GDMA and more countries will join as their marketing associations begin to undertake the data-driven marketing remit. Collectively, they represent a significant proportion of the world’s major brands, corporations, suppliers and agencies. Through its members’ associations, GlobalDMA provides access to the world’s largest network of data-driven marketing organisations and influencers.

FOR MORE INFORMATION, PLEASE VISIT WWW.GLOBALDMA.COM

Winterberry Group is a unique strategic consulting firm that supports the growth of advertising, marketing, media and information organizations. Our services include:

Corporate Strategy: The Opportunity Mapping strategic development process helps clients prioritize their available customer, channel and capability growth options, informed by a synthesis of market insights and intensive internal analysis.

Market Intelligence: Comprehensive industry trend, vertical market and value chain research provides in-depth analysis of customers, market developments and potential opportunities as a precursor to any growth or transaction strategy.

Marketing System Optimization and Alignment: Process mapping, marketplace benchmarking and holistic system engineering efforts are grounded in deep industry insights and “real-world” understandings—with a focus on helping advertisers, marketers and publishers better leverage their core assets.

Mergers & Acquisitions Due Diligence Support Services: Company assessments and industry landscape reports provide insight into trends, forecasts and comparative transaction data needed for reliable financial model inputs, supporting the needs of strategic and financial acquirers to make informed investment decisions and lay the foundation for value-focused ownership.

Additionally, Winterberry Group is differentiated through its affiliation with Petsky Prunier LLC, the leading investment bank serving the technology, media, marketing, e-commerce and healthcare industries. Together, the two firms provide one of the largest and most experienced sources of strategic and transactional services in their addressable markets.

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Sponsors

**Accenture Digital**, comprised of Accenture Analytics, Accenture Interactive and Accenture Mobility, offers a comprehensive portfolio of business and technology services across digital marketing, mobility and analytics. From developing digital strategies to implementing digital technologies and running digital processes on their behalf, Accenture Digital helps clients leverage connected and mobile devices; extract insights from data using analytics; and enrich end-customer experiences and interactions, delivering tangible results from the virtual world and driving growth.

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**MediaMath** is a global technology company that’s leading the movement to revolutionize traditional marketing and drive transformative results for marketers through its TerminalOne Marketing Operating System™. A pioneer in the industry for introducing the first Demand-Side Platform (DSP) with the company’s founding in 2007, MediaMath is the only company of its kind to empower marketers with an extensible, open platform to unleash the power of goal-based marketing at scale, transparently across the enterprise. TerminalOne activates data, automates execution, and optimizes interactions across all addressable media, delivering superior performance, transparency, and control to all marketers and better, more individualized experiences for consumers. MediaMath has delivered triple-digit year-over-year growth since inception. It has a seasoned management team leading 14 global locations across five continents. Key clients include every major agency holding company, operating agency, and top brands across verticals.

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Notice

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