The Global Review of Data-Driven Marketing and Advertising 2015

APPENDIX: MARKETPLACE SNAPSHOTS
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Argentina

PANEL:
158 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY – SEPTEMBER 2015

* Not all respondents answered every question

PRESENTING ASSOCIATION
Founded in 1987, amdia is a non profit organization that represents over 300 companies and marketing professionals who carry out their business in Argentina. amdia promotes the use of best practices and ethical standards with the aim of achieving responsible marketing within the industry. For more information, please visit: http://www.amdia.org.ar

PANEL COMPOSITION
How would you describe your principal role/business focus?

- MARKETER/ADVERTISER: 32.3%
- PUBLISHER/MEDIA: 3.2% (focused on selling advertising)
- PROVIDER OF MARKETING SERVICES: 17.1% (including data and agency services)
- DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY: 10.1%
- OTHER: 37.3%

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: 2.6%
- 1-5 years: 15.6%
- 6-10 years: 26.0%
- 11-15 years: 22.1%
- 16-25 years: 22.7%
- > 25 years: 7.8%

INDUSTRY REPRESENTATION
Within which of the following vertical markets are your professional efforts most intensively concentrated?
Displaying panelists’ “top three” responses

- Automotive: 4.1%
- Business-to-business services (“B2B”): 16.3%
- Consumer goods (“FMCG” or “CPG”): 28.6%
- Entertainment, media and/or publishing: 4.1%
- Financial services (banking, credit cards, investments, etc.): 14.3%
- Government: 2.0%
- Healthcare and/or pharmaceuticals: 2.0%
- Insurance: 2.0%
- Manufacturing: 0.0%
- Not-for-profit/charities: 0.0%
- Retail—predominately “brick-and-mortar” stores: 8.2%
- Retail—predominately catalog and/or e-commerce: 10.2%
- Technology: 8.2%
- Telecommunications: 0.0%
- Travel and hospitality: 8.2%
- Utilities: 0.0%
- Other: 12.2%
What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

DDMA PRACTICES

To what extent does your organization practice each of the following today?

- Not at all (1)
- To some extent (3)
- Sophisticated Practitioner (5)

Index scores were created by assigning scores of 1, 3 and 5 to the response choices, enabling the calculation of a weighted average on a 1-to-5 scale, with 1 indicating the use case is not practiced at all, and 5 indicating the use case is practiced in a sophisticated manner.

A NOTE ABOUT INDEX SCORES

Various “index scores” will appear throughout this report, representing a weighted average of panelist response to questions geared at understanding the extent to which DDMA practitioners are emphasizing various initiatives, opportunities and tactical priorities. Where possible, country-specific index scores—as reported on a scale of 1-to-5—are provided along with their comparable “Global Index” benchmarks, as reported by the entirety of The Global Review’s 17-nation worldwide panel.

Note: Throughout this report, various references to “2014” and “2015” data are included to display and contrast responses provided to the same question asked in the 2014 and 2015 versions of The Global Review, respectively.

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DDMA SOPHISTICATION

How sophisticated is your organization’s data-driven marketing and advertising (DDMA) approach?

<table>
<thead>
<tr>
<th>Rating</th>
<th>Argentina Index</th>
<th>Global Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Not at all sophisticated</td>
<td>15.7%</td>
<td>37.2%</td>
</tr>
<tr>
<td>2 About average</td>
<td>27.1%</td>
<td>24.3%</td>
</tr>
<tr>
<td>3 Very sophisticated</td>
<td>24.3%</td>
<td>12.9%</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?

<table>
<thead>
<tr>
<th>Confidence</th>
<th>2014</th>
<th>2015</th>
<th>2015 Global Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not at all confident</td>
<td>3.4%</td>
<td>2.1%</td>
<td>4.0%</td>
</tr>
<tr>
<td>Somewhat confident</td>
<td>0.0%</td>
<td>0.7%</td>
<td>4.1%</td>
</tr>
<tr>
<td>Extremely confident</td>
<td>21.0%</td>
<td>23.6%</td>
<td>73.1%</td>
</tr>
</tbody>
</table>
How are practitioners investing in DDMA? What returns are they generating?

SPENDING ON DDMA

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?

1. Decrease(d) significantly
2. No change
3. Increase(d) significantly

<table>
<thead>
<tr>
<th>The past year</th>
<th>The coming year</th>
<th>Argentina Index (2014)</th>
<th>Argentina Index (2015)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>6.7%</td>
<td>2.2%</td>
<td>41.5%</td>
<td>46.7%</td>
</tr>
<tr>
<td>3.0%</td>
<td>3.0%</td>
<td>25.2%</td>
<td>33.3%</td>
</tr>
<tr>
<td>2.2%</td>
<td>3.0%</td>
<td>9.6%</td>
<td>13.3%</td>
</tr>
<tr>
<td>3.38%</td>
<td>3.65%</td>
<td>3.69%</td>
<td>4.07%</td>
</tr>
</tbody>
</table>

Note: Refer to page 16 of the 2015 Global Review for global averages
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 your (or your clients’) spending in each of the following data-driven marketing and advertising channels is likely to change over the next year?

### SPENDING ON DDMA CHANNELS

<table>
<thead>
<tr>
<th>Channel</th>
<th>Spending change over past year as reported in 2014</th>
<th>Spending change over past year as reported in 2015</th>
<th>Anticipated 2016 spending change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Addressable TV</td>
<td>3.31</td>
<td>3.21</td>
<td>3.26</td>
</tr>
<tr>
<td>Digital display advertising*</td>
<td>3.89</td>
<td>3.79</td>
<td>3.83</td>
</tr>
<tr>
<td>Digital out-of-home</td>
<td>3.26</td>
<td>3.16</td>
<td>3.20</td>
</tr>
<tr>
<td>Direct mail</td>
<td>2.87</td>
<td>2.77</td>
<td>2.81</td>
</tr>
<tr>
<td>Email</td>
<td>2.48</td>
<td>2.38</td>
<td>2.42</td>
</tr>
<tr>
<td>Mobile apps/content, SMS</td>
<td>2.26</td>
<td>2.16</td>
<td>2.20</td>
</tr>
<tr>
<td>Search (SEO/SEM)</td>
<td>3.96</td>
<td>3.86</td>
<td>3.90</td>
</tr>
<tr>
<td>Social media management/content</td>
<td>4.14</td>
<td>4.04</td>
<td>4.08</td>
</tr>
<tr>
<td>Teleservices/contact centers</td>
<td>4.24</td>
<td>4.14</td>
<td>4.18</td>
</tr>
<tr>
<td>Web content (web/content optimization)</td>
<td>4.34</td>
<td>4.24</td>
<td>4.28</td>
</tr>
</tbody>
</table>

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

Note: Refer to page 17 of the 2015 Global Review for global averages
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 your (or your clients’) spending on the following data-driven marketing and advertising campaign execution functions is likely to change over the next year?

- Spending change over past year as reported in 2014
- Spending change over past year as reported in 2015
- Anticipated 2016 spending change

Note: Refer to page 18 of the 2015 Global Review for global averages
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?

- Performance change over past year as reported in 2014
- Performance change over past year as reported in 2015

Note: Refer to page 19 of the 2015 Global Review for global averages

* 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?

FACTORS DRIVING OR INHIBITING DDMA

To what extent are each of the following factors driving or inhibiting your (or your clients’) investment in DDMA?

Argentina Index
Global Index

- Availability/usefulness of advertising and marketing technology
- Desire to align with consumer media preferences
- Mandate from my company (or clients’) leadership
- Desire to be “customer-centric”
- Availability of necessary talent/marketing organization
- Current business processes
- Potential future regulatory guidelines (e.g. with respect to consumer privacy, data security, etc.)
- Prevailing regulatory guidelines (e.g. with respect to consumer privacy, data security, etc.)
- Availability/usefulness of third-party audience data
- General economic conditions
- Desire to align with consumer media preferences

Argentina Index
Global Index

Driving investment a great deal
Neither driving nor inhibiting
Inhibiting investment a great deal
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?

PERSPECTIVES ON REGULATION

To what extent do you agree or disagree with the following statements?

Note: Refer to page 23 of the 2015 Global Review for global averages
What do practitioners need to derive greater value from DDMA?

DERIVING VALUE FROM PROGRAMS

How important would each of the following be in advancing your (or your clients’) ability to derive value from your DDMA programs?

Argentina Index  Global Index
Australia
Australia

PANEL:
467 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY – SEPTEMBER 2015

* Not all respondents answered every question

PRESENTING ASSOCIATION
The Association for Data-driven Marketing and Advertising (ADMA) is the principal industry body for information-based marketing and advertising and is the largest marketing and advertising body in Australia. For more information, please visit: www.adma.com.au

PANEL COMPOSITION
How would you describe your principal role/business focus?

- MARKETER/ADVERTISER: 54.8%
- PUBLISHER/MEDIA: 3.9%
  (focused on selling advertising)
- PROVIDER OF MARKETING SERVICES: 27.6%
  (including data and agency services)
- DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY: 3.2%
- OTHER: 10.5%

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: 1.8%
- 1-5 years: 16.3%
- 6-10 years: 25.8%
- 11-15 years: 22.3%
- 16-25 years: 21.4%
- > 25 years: 10.6%

INDUSTRY REPRESENTATION
Within which of the following vertical markets are your professional efforts most intensively concentrated?
Displaying panelists’ “top three” responses

- Automotive: 5.3% 28.6%
- Business-to-business services (“B2B”): 8.6%
- Consumer goods (“FMCG” or “CPG”): 10.6%
- Entertainment, media and/or publishing: 15.9%
- Financial services (banking, credit cards, investments, etc.): 4.1%
- Government: 4.5%
- Healthcare and/or pharmaceuticals: 6.5%
- Insurance: 9.4%
- Manufacturing: 9.8%
- Not-for-profit/charities: 8.2%
- Retail—predominately “brick-and-mortar” stores: 6.5%
- Retail—predominately catalog and/or e-commerce: 11.0%
- Technology: 3.3%
- Telecommunications: 5.7%
- Travel and hospitality: 0.4%
- Utilities: 14.3%
- Other: 1.6%
What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

DDMA PRACTICES
To what extent does your organization practice each of the following today?

- Not at all (1)
- To some extent (3)
- Sophisticated Practitioner (5)

<table>
<thead>
<tr>
<th>Practice</th>
<th>Australia Index</th>
<th>Global Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase third-party data (e.g. mailing lists, digital behavioral data, etc.) to support targeted marketing campaigns</td>
<td>40.4% 12.7%</td>
<td>2.45 2.74</td>
</tr>
<tr>
<td>Maintain databases to host information on customers and/or prospects</td>
<td>51.2% 3.4%</td>
<td>3.84 3.80</td>
</tr>
<tr>
<td>Segment data so as to better target and engage addressable consumer (and/or B-to-B) audiences</td>
<td>47.0% 9.2%</td>
<td>3.69 3.74</td>
</tr>
<tr>
<td>Measure campaign results across individual marketing channels (e.g. only in one type of campaign, such as direct mail)</td>
<td>48.5% 7.1%</td>
<td>3.74 3.74</td>
</tr>
<tr>
<td>Measure campaign results across multiple marketing channels (e.g. supporting media mix allocation and customer segmentation across multiple channels, such as direct mail, email and digital advertising)</td>
<td>53.0% 13.7%</td>
<td>3.39 3.36</td>
</tr>
</tbody>
</table>

Index scores were created by assigning scores of 1, 3 and 5 to the response choices, enabling the calculation of a weighted average on a 1-to-5 scale, with 1 indicating the use case is not practiced at all, and 5 indicating the use case is practiced in a sophisticated manner.

A NOTE ABOUT INDEX SCORES
Various “index scores” will appear throughout this report, representing a weighted average of panelist response to questions geared at understanding the extent to which DDMA practitioners are emphasizing various initiatives, opportunities and tactical priorities. Where possible, country-specific index scores—as reported on a scale of 1-to-5—are provided along with their comparable “Global Index” benchmarks, as reported by the entirety of The Global Review’s 17-nation worldwide panel.

Note: Throughout this report, various references to “2014” and “2015” data are included to display and contrast responses provided to the same question asked in the 2014 and 2015 versions of The Global Review, respectively.
**DDMA SOPHISTICATION**

How sophisticated is your organization’s data-driven marketing and advertising (DDMA) approach?

![Chart showing the distribution of DDMA sophistication levels.](chart)

**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?

![Chart showing the distribution of confidence levels.](chart)
How are practitioners investing in DDMA? What returns are they generating?

**SPENDING ON DDMA**

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?

<table>
<thead>
<tr>
<th>The past year</th>
<th>The coming year</th>
<th>Australia Index (2014)</th>
<th>Australia Index (2015)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Decrease(d) significantly</td>
<td>Increase(d) significantly</td>
<td>No change</td>
<td>No change</td>
</tr>
<tr>
<td>2.7%</td>
<td>1.7%</td>
<td>34.7%</td>
<td>48.8%</td>
</tr>
<tr>
<td>4.7%</td>
<td>2.3%</td>
<td>21.5%</td>
<td>40.3%</td>
</tr>
<tr>
<td>Decrease(d) significantly</td>
<td>Increase(d) significantly</td>
<td>No change</td>
<td>No change</td>
</tr>
<tr>
<td>1.7%</td>
<td>2.3%</td>
<td>21.5%</td>
<td>40.3%</td>
</tr>
<tr>
<td>2.7%</td>
<td>1.7%</td>
<td>34.7%</td>
<td>48.8%</td>
</tr>
<tr>
<td>4.7%</td>
<td>2.3%</td>
<td>21.5%</td>
<td>40.3%</td>
</tr>
<tr>
<td>17.7%</td>
<td>25.7%</td>
<td>34.7%</td>
<td>48.8%</td>
</tr>
</tbody>
</table>

Note: Refer to page 16 of the 2015 Global Review for global averages
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 your (or your clients’) spending in each of the following data-driven marketing and advertising channels is likely to change over the next year?

- Spending change over past year as reported in 2014
- Spending change over past year as reported in 2015
- Anticipated 2016 spending change

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

Note: Refer to page 17 of the 2015 Global Review for global averages
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 your (or your clients’) spending on the following data-driven marketing and advertising campaign execution functions is likely to change over the next year?

- Spending change over past year as reported in 2014
- Spending change over past year as reported in 2015
- Anticipated 2016 spending change

Note: Refer to page 18 of the 2015 Global Review for global averages.
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?

- Performance change over past year as reported in 2014
- Performance change over past year as reported in 2015

Note: Refer to page 19 of the 2015 Global Review for global averages

* 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?

FACTORS DRIVING OR INHIBITING DDMA
To what extent are each of the following factors driving or inhibiting your (or your clients’) investment in DDMA?

Graph showing factors driving or inhibiting DDMA investment with numerical ratings for Australia and global indexes.
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?


<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Do not limit at all</td>
<td>16.8%</td>
<td>10.8%</td>
<td>12.8%</td>
<td>12.8%</td>
</tr>
<tr>
<td>2 Somewhat limit</td>
<td>18.3%</td>
<td>45.3%</td>
<td>41.1%</td>
<td>9.4%</td>
</tr>
<tr>
<td>3 Substantially limit</td>
<td>9.7%</td>
<td>13.3%</td>
<td>22.8%</td>
<td>9.5%</td>
</tr>
<tr>
<td>4</td>
<td>19.1%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

PERSPECTIVES ON REGULATION

To what extent do you agree or disagree with the following statements?

- Good marketing data governance represents a competitive advantage for its practitioners.
- I fear that increased regulation of the use of marketing data in my market will negatively affect my business.
- Practicing data-driven marketing is easier in my market than in others.
- Regulations for marketing data use should be standardized across markets.

Note: Refer to page 23 of the 2015 Global Review for global averages
What do practitioners need to derive greater value from DDMA?

DERIVING VALUE FROM PROGRAMS

How important would each of the following be in advancing your (or your clients’) ability to derive value from your DDMA programs?

Australia Index  Global Index

1. Better integration between advertising and marketing technology platforms
   Rating: 4.35

2. Improved campaign measurement and attribution data
   Rating: 4.24

3. Enhanced support from agency(ies) and other service providers
   Rating: 3.77

4. Better understanding of DDMA and its contribution among senior stakeholders
   Rating: 4.12

5. More/better staff training with respect to marketing technology
   Rating: 4.09

6. Improved access to quality audience data
   Rating: 4.02

7. Improved organizational processes (including incentive structures and data-sharing policies)
   Rating: 3.71

8. More/better staff training with respect to analytics, segmentation and targeting
   Rating: 4.01

9. More/better staff training with respect to digital marketing programs/execution
   Rating: 3.93

10. Better integration between advertising and marketing technology platforms
    Rating: 4.00

11. More/better staff training with respect to digital marketing programs/execution
    Rating: 4.00

12. Improved organizational processes (including incentive structures and data-sharing policies)
    Rating: 3.71

13. Better understanding of DDMA and its contribution among senior stakeholders
    Rating: 4.12

14. Improved access to quality audience data
    Rating: 4.02

15. Enhanced support from agency(ies) and other service providers
    Rating: 3.77

16. More/better staff training with respect to analytics, segmentation and targeting
    Rating: 4.01

17. Improved organizational processes (including incentive structures and data-sharing policies)
    Rating: 3.71

18. Better integration between advertising and marketing technology platforms
    Rating: 4.00

19. More/better staff training with respect to digital marketing programs/execution
    Rating: 4.00

20. Improved access to quality audience data
    Rating: 4.02
Belgium
Presenting association:
The Belgian Direct Marketing Association (bdma) is a unique Belgian marketing platform that gathers advertisers, marketing service providers and experts. bdma defends the interests of its members, provides information and training and thus determines the image of direct marketing in Belgium. For more information, please visit www.bdma.be.

Panel composition:
How would you describe your principal role/business focus?

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.

Industry representation:
Within which of the following vertical markets are your professional efforts most intensively concentrated?
Displaying panelists’ “top three” responses.

Panel:
215 total respondents*

Survey timeframe:
July – August 2015

* Not all respondents answered every question.
What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

DDMA PRACTICES
To what extent does your organization practice each of the following today?

- Not at all (1)
- To some extent (3)
- Sophisticated Practitioner (5)

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Note: Throughout this report, various references to “2014” and “2015” data are included to display and contrast responses provided to the same question asked in the 2014 and 2015 versions of The Global Review, respectively.
DDMA SOPHISTICATION
How sophisticated is your organization’s data-driven marketing and advertising (DDMA) approach?

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?
How are practitioners investing in DDMA? What returns are they generating?

SPENDING ON DDMA

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?

Note: Refer to page 16 of the 2015 Global Review for global averages
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 your (or your clients’) spending in each of the following data-driven marketing and advertising channels is likely to change over the next year?

Spending change over past year as reported in 2014  Spending change over past year as reported in 2015  Anticipated 2016 spending change

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

Note: Refer to page 17 of the 2015 Global Review for global averages
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 your (or your clients’) spending on the following data-driven marketing and advertising campaign execution functions is likely to change over the next year?

- Spending change over past year as reported in 2014
- Spending change over past year as reported in 2015
- Anticipated 2016 spending change

Note: Refer to page 18 of the 2015 Global Review for global averages
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?

- Performance change over past year as reported in 2014
- Performance change over past year as reported in 2015

Note: Refer to page 19 of the 2015 Global Review for global averages

* 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?

FACTORS DRIVING OR INHIBITING DDMA

To what extent are each of the following factors driving or inhibiting your (or your clients’) investment in DDMA?

Belgium Index

- Desire to be “customer-centric”
- Desire to align with consumer media preferences
- Desire to align with consumer (or clients’) leadership
- Availability of advertising and marketing technology
- Availability of necessary talent/marketing expertise
- Availability of regulatory guidelines (e.g. with respect to consumer privacy, data security, etc.)
- General economic conditions in our market
- Current business processes within my (or my clients’) organization
- Potential future regulatory guidelines (e.g. with respect to consumer privacy, data security, etc.)

Global Index

- Availability/usefulness of third-party audience data for purchase or license
- Desire to align with consumer media preferences
- Availability/usefulness of advertising and marketing technology
- Availability of necessary talent/marketing expertise
- Potential future regulatory guidelines (e.g. with respect to consumer privacy, data security, etc.)
- General economic conditions in our market
- Current business processes within my (or my clients’) organization
- Desire to be “customer-centric”
- Desire to align with consumer (or clients’) leadership
- Availability of advertising and marketing technology
- Availability of necessary talent/marketing expertise
- Availability of regulatory guidelines (e.g. with respect to consumer privacy, data security, etc.)

Scores:

- 5.0: Driving investment a great deal
- 4.0: Inhibiting investment a great deal
- 3.0: Neither driving nor inhibiting
- 2.0: Inhibiting investment quite a bit
- 1.0: Driving investment quite a bit
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?


1 2 3
Do not limit at all 21.2% 24.2% 34.8%
24.2% 32.5%
21.2% 34.8%

Perspectives on Regulation

To what extent do you agree or disagree with the following statements?

1. Good marketing data governance represents a competitive advantage for its practitioners.
2. I fear that increased regulation of the use of marketing data in my market will negatively affect my business.
3. Practicing data-driven marketing is easier in my market than in others.
4. Regulations for marketing data use should be standardized across markets.

Note: Refer to page 23 of the 2015 Global Review for global averages.
What do practitioners need to derive greater value from DDMA?

DERIVING VALUE FROM PROGRAMS

How important would each of the following be in advancing your (or your clients') ability to derive value from your DDMA programs?

Belgium Index  Global Index

4.48  4.24
4.22  4.45
4.08  4.42
4.27  4.12
4.34  4.09
4.48  4.24
4.32  4.12
4.27  4.03
4.11  4.10
3.88  3.77
3.84  3.77

- Better understanding of DDMA and its contribution among senior stakeholders
- Improved access to quality audience data
- Improved campaign measurement and attribution
- Improved campaign measurement and attribution tools
- Better integration between advertising and marketing technology platforms
- More/better staff training with respect to digital marketing programs/execution
- More/better staff training with respect to analytics, segmentation and targeting
- More/better staff training with respect to digital marketing programs/execution
- More/better staff training with respect to digital marketing programs/execution
- More/better staff training with respect to marketing and advertising technology
- Improved campaign measurement and attribution
- Improved campaign measurement and attribution tools
- Better understanding of DDMA and its contribution among senior stakeholders
- Enhanced support from agency and other service providers
- Improved organizational processes (including incentive structures and data-sharing policies)
- Better integration between advertising and marketing technology platforms
- More/better staff training with respect to marketing and advertising technology
- Improved campaign measurement and attribution
- Improved campaign measurement and attribution tools
- Better understanding of DDMA and its contribution among senior stakeholders
- Enhanced support from agency and other service providers
- Improved organizational processes (including incentive structures and data-sharing policies)
Brazil
PANEL COMPOSITION
How would you describe your principal role/business focus?

- MARKETER/ADVERTISER: 30.4%
- PUBLISHER/MEDIA: 11.1% (focused on selling advertising)
- PROVIDER OF MARKETING SERVICES: 36.1% (including data and agency services)
- DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY: 8.0%
- OTHER: 14.3%

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

- < 1 year: 2.3%
- 1-5 years: 21.6%
- 6-10 years: 24.7%
- 11-15 years: 17.1%
- 16-25 years: 19.4%
- > 25 years: 11.3%

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

Displaying panelists’ “top three” responses:

- Automotive: 26.0%
- Business-to-business services ("B2B"): 11.6%
- Consumer goods ("FMCG" or "CPG"): 9.6%
- Entertainment, media and/or publishing: 10.3%
- Financial services (banking, credit cards, investments, etc.): 4.8%
- Government: 5.5%
- Healthcare and/or pharmaceuticals: 6.8%
- Insurance: 12.3%
- Manufacturing: 5.5%
- Not-for-profit/charities: 13.7%
- Retail—predominately “brick-and-mortar” stores: 15.1%
- Retail—predominately catalog and/or e-commerce: 10.3%
- Technology: 4.8%
- Telecommunications: 4.8%
- Travel and hospitality: 0.0%
- Utilities: 11.0%
- Other: 0.0%

PRESENTING ASSOCIATION
ABEMD is a not-for-profit civil entity founded in 1976 to organize individuals and companies interested in direct marketing. ABEMD works to incentivize, value, develop and promote direct marketing in Brazil. The association includes companies that render services in several areas of direct marketing as well as corporations that use these tools within their communication and marketing strategies. For more information, please visit www.abemd.org.br
What is Data-Driven Marketing and Advertising (DDMA)?
How is the practice evolving?

DDMA PRACTICES
To what extent does your organization practice each of the following today?

- Not at all (1)
- To some extent (3)
- Sophisticated Practitioner (5)

<table>
<thead>
<tr>
<th>Practice</th>
<th>Brazil</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Segment data so as to better target and engage addressable consumer</td>
<td>15.5%</td>
<td>47.0%</td>
</tr>
<tr>
<td>Maintain databases to host information on customers and/or prospects</td>
<td>11.8%</td>
<td>21.3%</td>
</tr>
<tr>
<td>Measure campaign results across multiple marketing channels (e.g.,</td>
<td>21.3%</td>
<td>31.5%</td>
</tr>
<tr>
<td>supporting media mix allocation and customer segmentation across</td>
<td></td>
<td></td>
</tr>
<tr>
<td>multiple channels, such as direct mail)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Measure campaign results across individual marketing channels (e.g.,</td>
<td>16.8%</td>
<td>47.0%</td>
</tr>
<tr>
<td>only in one type of campaign, such as direct mail)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purchase third-party data (e.g., mailing lists, digital behavioral data,</td>
<td>37.3%</td>
<td>37.3%</td>
</tr>
<tr>
<td>etc.) to support targeted marketing campaigns</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Index scores were created by assigning scores of 1, 3 and 5 to the response choices, enabling the calculation of a weighted average on a 1-to-5 scale, with 1 indicating the use case is not practiced at all, and 5 indicating the use case is practiced in a sophisticated manner.

A NOTE ABOUT INDEX SCORES
Various “index scores” will appear throughout this report, representing a weighted average of panelist response to questions geared at understanding the extent to which DDMA practitioners are emphasizing various initiatives, opportunities and tactical priorities. Where possible, country-specific index scores—as reported on a scale of 1-to-5—are provided along with their comparable “Global Index” benchmarks, as reported by the entirety of The Global Review’s 17-nation worldwide panel.
DDMA SOPHISTICATION

How sophisticated is your organization’s data-driven marketing and advertising (DDMA) approach?

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?
How are practitioners investing in DDMA? What returns are they generating?

SPENDING ON DDMA

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?

Note: Refer to page 16 of the 2015 Global Review for global averages
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 your (or your clients’) spending in each of the following data-driven marketing and advertising channels is likely to change over the next year?

- Spending change over past year as reported in 2014
- Spending change over past year as reported in 2015
- Anticipated 2016 spending change

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

Note: Refer to page 17 of the 2015 Global Review for global averages
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 your (or your clients’) spending on the following data-driven marketing and advertising campaign execution functions is likely to change over the next year?

- Spending change over past year as reported in 2014
- Spending change over past year as reported in 2015
- Anticipated 2016 spending change

Note: Refer to page 18 of the 2015 Global Review for global averages
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?

Channel performance
- Improved substantially
- Declined substantially
- No material change

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

Note: Refer to page 19 of the 2015 Global Review for global averages
What’s driving the practice of DDMA?
What’s inhibiting it?

FACTORS DRIVING OR INHIBITING DDMA
To what extent are each of the following factors driving or inhibiting your (or your clients’) investment in DDMA?

Desire to be “customer-centric”
Desire to align with consumer media preferences
Availability/usefulness of advertising and marketing technology
Mandate from my company (or clients’ leadership)
Availability/usefulness of third-party audience data
Desire to be “customer-centric”
Current business processes in our market
Mandate from my company (or clients’ leadership)
Potential future regulatory guidelines (e.g., with respect to consumer privacy, data security, etc.)
General economic conditions

Brazil Index
Global Index
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?

PERSPECTIVES ON REGULATION

To what extent do you agree or disagree with the following statements?

Note: Refer to page 23 of the 2015 Global Review for global averages
What do practitioners need to derive greater value from DDMA?

DERIVING VALUE FROM PROGRAMS

How important would each of the following be in advancing your (or your clients’) ability to derive value from your DDMA programs?

- Better understanding of DDMA and its contribution among senior stakeholders
- Improved campaign measurement and attribution tools
- More/better staff training with respect to analytics, segmentation and targeting
- Improved access to quality audience data
- Better integration between advertising and marketing technology platforms
- More/better staff training with respect to marketing and advertising technology
- Improved organizational processes (including incentive structures and data-sharing policies)
- Enhanced support from agency(ies) and other service providers
- Improved skills and tools with respect to digital marketing programs and execution
- Improved access to quality audience data
Chile

PANEL:
35 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY – AUGUST 2015

* Not all respondents answered every question

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: 0.0%
- 1-5 years: 18.2%
- 6-10 years: 27.3%
- 11-15 years: 30.3%
- 16-25 years: 18.2%
- > 25 years: 6.1%

INDUSTRY REPRESENTATION
Within which of the following vertical markets are your professional efforts most intensively concentrated?
Displaying panelists’ “top three” responses

- Automotive: 10.0%
- Business-to-business services (“B2B”): 10.0%
- Consumer goods (“FMCG” or “CPG”): 20.0%
- Entertainment, media and/or publishing: 0.0%
- Financial services (banking, credit cards, investments, etc.): 70.0%
- Government: 0.0%
- Healthcare and/or pharmaceuticals: 10.0%
- Insurance: 0.0%
- Manufacturing: 20.0%
- Not-for-profit/charities: 0.0%
- Retail—predominantly “brick-and-mortar” stores: 10.0%
- Retail—predominantly catalog and/or e-commerce: 0.0%
- Technology: 0.0%
- Telecommunications: 0.0%
- Travel and hospitality: 10.0%
- Utilities: 0.0%
- Other: 0.0%

PRESENTING ASSOCIATION
The Direct Marketing Association of Chile AG is a nonprofit organization that has existed since 1993 with the aim of developing and strengthening the direct marketing industry in Chile jointly with partners, suppliers, companies and universities. Our policy has been aimed at disseminating, through various activities and media, information to establish fluid contact with partners and other stakeholders within the industry, with the goal of advancing direct marketing.
## What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

### DDMA Practices

To what extent does your organization practice each of the following today?

<table>
<thead>
<tr>
<th>Practice Description</th>
<th>Not at all (1)</th>
<th>To some extent (3)</th>
<th>Sophisticated Practitioner (5)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase third-party data (e.g. mailing lists, digital behavioral data, etc.) to support targeted marketing campaigns</td>
<td>74.1%</td>
<td>7.4%</td>
<td>18.5%</td>
</tr>
<tr>
<td>Maintain databases to host information on customers and/or prospects</td>
<td>70.4%</td>
<td>7.4%</td>
<td>22.2%</td>
</tr>
<tr>
<td>Segment data so as to better target and engage addressable consumer (and/or B-to-B) audiences</td>
<td>70.4%</td>
<td>0.0%</td>
<td>59.3%</td>
</tr>
<tr>
<td>Measure campaign results across individual marketing channels (e.g. only in one type of campaign, such as direct mail)</td>
<td>3.7%</td>
<td>37.0%</td>
<td>59.3%</td>
</tr>
<tr>
<td>Measure campaign results across multiple marketing channels (e.g. supporting media mix allocation and customer segmentation across multiple channels, such as direct mail, email and digital advertising)</td>
<td>48.1%</td>
<td>48.1%</td>
<td>3.7%</td>
</tr>
</tbody>
</table>

Index scores were created by assigning scores of 1, 3 and 5 to the response choices, enabling the calculation of a weighted average on a 1-to-5 scale, with 1 indicating the use case is not practiced at all, and 5 indicating the use case is practiced in a sophisticated manner.

### A Note about Index Scores

Various “index scores” will appear throughout this report, representing a weighted average of panelist response to questions geared at understanding the extent to which DDMA practitioners are emphasizing various initiatives, opportunities and tactical priorities. Where possible, country-specific index scores—as reported on a scale of 1-to-5—are provided along with their comparable “Global Index” benchmarks, as reported by the entirety of The Global Review’s 17-nation worldwide panel.

Note: Throughout this report, various references to “2014” and “2015” data are included to display and contrast responses provided to the same question asked in the 2014 and 2015 versions of The Global Review, respectively.
**DDMA SOPHISTICATION**

How sophisticated is your organization’s data-driven marketing and advertising (DDMA) approach?

![Bar Chart]

**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?

![Bar Chart]

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How are practitioners investing in DDMA? What returns are they generating?

SPENDING ON DDMA

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?

- Decrease(d) significantly
- No change
- Increase(d) significantly

Note: Refer to page 16 of the 2015 Global Review for global averages
**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 your (or your clients’) spending in each of the following data-driven marketing and advertising channels is likely to change over the next year?

- **Spending change over past year as reported in 2015**
- **Anticipated 2016 spending change**

<table>
<thead>
<tr>
<th>Channel</th>
<th>2015 Spending Change</th>
<th>2016 Spending Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Addressable TV</td>
<td>3.43</td>
<td>3.53</td>
</tr>
<tr>
<td>Digital display advertising*</td>
<td>4.37</td>
<td>4.77</td>
</tr>
<tr>
<td>Digital out-of-home</td>
<td>2.84</td>
<td>3.02</td>
</tr>
<tr>
<td>Direct mail</td>
<td>2.06</td>
<td>2.00</td>
</tr>
<tr>
<td>Email</td>
<td>4.05</td>
<td>4.10</td>
</tr>
<tr>
<td>Mobile apps, content, SMS</td>
<td>3.90</td>
<td>4.30</td>
</tr>
<tr>
<td>Search (SEO/SEM)</td>
<td>4.20</td>
<td>4.29</td>
</tr>
<tr>
<td>Social media management/content</td>
<td>4.27</td>
<td>4.20</td>
</tr>
<tr>
<td>Teleservices/contact centers</td>
<td>4.09</td>
<td>4.05</td>
</tr>
<tr>
<td>Web content (telecom/online)</td>
<td>4.30</td>
<td>4.30</td>
</tr>
</tbody>
</table>

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

Note: Refer to page 17 of the 2015 Global Review for global averages
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 your (or your clients’) spending on the following data-driven marketing and advertising campaign execution functions is likely to change over the next year?

- Audience analytics/measurement and attribution (including Web analytics)
- Creative and content development
- Customer contact/reporting (including call center, social media engagement)
- Data compilation, sourcing and/or brokerage
- Data/database management (including CRM and “DMP” technology)
- Digital campaign execution (Web and mobile)
- Predictive analytics/modeling and segmentation
- Traditional campaign execution (printing, mailing, fulfillment, etc.)

Note: Refer to page 18 of the 2015 Global Review for global averages
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?

Performance change over past year as reported in 2015

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

Note: Refer to page 19 of the 2015 Global Review for global averages
What's driving the practice of DDMA?
What's inhibiting it?

FACTORS DRIVING OR INHIBITING DDMA

To what extent are each of the following factors driving or inhibiting your (or your clients') investment in DDMA?

- Infrastructure
- Desire to align with consumer media preferences
- General economic conditions in our market
- Availability/usefulness of advertising and marketing technology
- General regulatory guidelines (e.g., with respect to consumer privacy, data security, etc.)
- Desirability of "customer-centric"
- Current business processes within my (or my clients') organization
- Availability of necessary talent (marketing, data science, etc.)
- Availability/usefulness of third-party audience data for purchase or license
- Funding from (or my clients') leadership
- Desire to be "customer-centric"
- Mandate from my company (or clients') leadership
- Potential future regulatory guidelines (e.g., with respect to consumer privacy, data security, etc.)
- Availability/usefulness of third-party audience data
- Current business processes within my (or my clients') organization
- General economic conditions in our market
- Infrastructure
- Desire to align with consumer media preferences
- Desirability of "customer-centric"
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- Funding from (or my clients') leadership
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- Funding from (or my clients') leadership
- Potential future regulatory guidelines (e.g., with respect to consumer privacy, data security, etc.)
- Availability/usefulness of third-party audience data
- Current business processes within my (or my clients') organization
- General economic conditions in our market
- Infrastructure
- Desire to align with consumer media preferences
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- Current business processes within my (or my clients') organization
- Availability of necessary talent (marketing, data science, etc.)
- Availability/usefulness of third-party audience data for purchase or license
- Funding from (or my clients') leadership
- Potential future regulatory guidelines (e.g., with respect to consumer privacy, data security, etc.)
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- Availability/usefulness of third-party audience data for purchase or license
- Funding from (or my clients') leadership
- Potential future regulatory guidelines (e.g., with respect to consumer privacy, data security, etc.)
- Availability/usefulness of third-party audience data
- Current business processes within my (or my clients') organization
- General economic conditions in our market
- Infrastructure
- Desire to align with consumer media preferences
- Desirability of "customer-centric"
- Current business processes within my (or my clients') organization
- Availability of necessary talent (marketing, data science, etc.)
- Availability/usefulness of third-party audience data for purchase or license
- Funding from (or my clients') leadership
- Potential future regulatory guidelines (e.g., with respect to consumer privacy, data security, etc.)
- Availability/usefulness of third-party audience data
- Current business processes within my (or my clients') organization
- General economic conditions in our market
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- Availability of necessary talent (marketing, data science, etc.)
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- Funding from (or my clients') leadership
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- Availability/usefulness of third-party audience data
- Current business processes within my (or my clients') organization
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- Funding from (or my clients') leadership
- Potential future regulatory guidelines (e.g., with respect to consumer privacy, data security, etc.)
- Availability/usefulness of third-party audience data
- Current business processes within my (or my clients') organization
- General economic conditions in our market
- Infrastructure
- Desire to align with consumer media preferences
- Desirability of "customer-centric"
- Current business processes within my (or my clients') organization
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?

PERSPECTIVES ON REGULATION

To what extent do you agree or disagree with the following statements?

- Good marketing data governance represents a competitive advantage for its practitioners.
- I fear that increased regulation of the use of marketing data in my market will negatively affect my business.
- Practicing data-driven marketing is easier in my market than in others.
- Regulations for marketing data use should be standardized across markets.

Note: Refer to page 23 of the 2015 Global Review for global averages
What do practitioners need to derive greater value from DDMA?

DERIVING VALUE FROM PROGRAMS

How important would each of the following be in advancing your (or your clients’) ability to derive value from your DDMA programs?

Chile Index  Global Index

Better understanding of DDMA and its contribution among senior stakeholders
Improve campaign measurement and attribution tools
More better staff training with respect to analytics
More better staff training with respect to digital marketing programs and execution
Better integration between advertising and marketing technology platforms
Improved access to quality audience data
Improved organizational processes (including incentive structures and data sharing policies)
Enhanced support from agency and other service providers
Improved measurement and attribution tools
More/better staff training with respect to analytics, segmentation and targeting
More/better staff training with respect to marketing and advertising technology
More/better staff training with respect to marketing and advertising technology
France
**France**

**Panel:**
137 TOTAL RESPONDENTS*

**Survey Timeframe:**
JULY – SEPTEMBER 2015

*Not all respondents answered every question

---

**Panel Composition**

How would you describe your principal role/business focus?

- **Marketer/Advertiser:** 54.0%
- **Publisher/Media:** 0.7% (focused on selling advertising)
- **Provider of Marketing Services:** 25.5% (including data and agency services)
- **Developer of Advertising & Marketing Technology:** 6.6%
- **Other:** 13.1%

---

**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:** 4.8%
- **1-5 years:** 15.3%
- **6-10 years:** 19.4%
- **11-15 years:** 13.7%
- **16-25 years:** 25.8%
- **> 25 years:** 18.5%

---

**Industry Representation**

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

Displaying panelists’ “top three” responses

- **Automotive:** 33.8%
- **Business-to-business services (“B2B”):**
- **Consumer goods (“FMCG” or “CPG”):**
- **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:**

---

**Presenting Association**

French Marketers is the label which represents the French marketing community in foreign countries. The GDMA research has been launched in France by the following marketing associations: Adetem, Cercle du Marketing Direct CMD, Syndicat National de la communication directe SNCD with the support of two partners E-marketing.fr and Ensemble B2B. For more information, please contact cecile.delettre@adetem.net
What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

**DDMA PRACTICES**

To what extent does your organization practice each of the following today?

- **Not at all (1)**
- **To some extent (3)**
- **Sophisticated Practitioner (5)**

### Indicators and Percentages

<table>
<thead>
<tr>
<th>Practice</th>
<th>France Index</th>
<th>Global Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Segment data so as to better target and engage addressable consumer (and/or B-to-B audiences)</td>
<td>50.0%</td>
<td>56.5%</td>
</tr>
<tr>
<td>Maintain databases to host information on customers and/or prospects</td>
<td>35.9%</td>
<td>42.4%</td>
</tr>
<tr>
<td>Purchase third-party data (e.g. mailing lists, digital behavioral data, etc.) to support targeted marketing campaigns</td>
<td>32.6%</td>
<td>39.1%</td>
</tr>
<tr>
<td>Measure campaign results across individual marketing channels (e.g. only in one type of campaign, such as direct mail)</td>
<td>14.1%</td>
<td>10.9%</td>
</tr>
<tr>
<td>Measure campaign results across multiple marketing channels (e.g. supporting media mix allocation and customer segmentation across multiple channels, such as direct mail, email and digital advertising)</td>
<td>23.9%</td>
<td>32.6%</td>
</tr>
</tbody>
</table>

Index scores were created by assigning scores of 1, 3 and 5 to the response choices, enabling the calculation of a weighted average on a 1-to-5 scale, with 1 indicating the use case is not practiced at all, and 5 indicating the use case is practiced in a sophisticated manner.

**A NOTE ABOUT INDEX SCORES**

Various “index scores” will appear throughout this report, representing a weighted average of panelist response to questions geared at understanding the extent to which DDMA practitioners are emphasizing various initiatives, opportunities and tactical priorities. Where possible, country-specific index scores—as reported on a scale of 1-to-5—are provided along with their comparable “Global Index” benchmarks, as reported by the entirety of The Global Review’s 17-nation worldwide panel.

Note: Throughout this report, various references to “2014” and “2015” data are included to display and contrast responses provided to the same question asked in the 2014 and 2015 versions of The Global Review, respectively.
**DDMA SOPHISTICATION**

How sophisticated is your organization’s data-driven marketing and advertising (DDMA) approach?

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not at all sophisticated</td>
<td>13.0%</td>
<td>23.9%</td>
<td>19.6%</td>
<td>19.6%</td>
</tr>
<tr>
<td>About average</td>
<td>41.3%</td>
<td></td>
<td></td>
<td></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?

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not at all confident</td>
<td>0.0%</td>
<td>3.3%</td>
<td>0.0%</td>
<td>4.3%</td>
</tr>
<tr>
<td>Somewhat confident</td>
<td>34.4%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Extremely confident</td>
<td>68.4%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

How are practitioners investing in DDMA? What returns are they generating?

SPENDING ON DDMA

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?

<table>
<thead>
<tr>
<th></th>
<th>The past year</th>
<th>The coming year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Decrease(d) significantly</td>
<td>8.7%</td>
<td>5.8%</td>
</tr>
<tr>
<td>No change</td>
<td>7.3%</td>
<td>5.8%</td>
</tr>
<tr>
<td>Increase(d) significantly</td>
<td>33.3%</td>
<td>26.1%</td>
</tr>
<tr>
<td></td>
<td>26.1%</td>
<td>23.2%</td>
</tr>
<tr>
<td></td>
<td>26.1%</td>
<td>29.0%</td>
</tr>
</tbody>
</table>

Note: Refer to page 16 of the 2015 Global Review for global averages.
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 your (or your clients’) spending in each of the following data-driven marketing and advertising channels is likely to change over the next year?

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

Note: Refer to page 17 of the 2015 Global Review for global averages
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 your (or your clients’) spending on the following data-driven marketing and advertising campaign execution functions is likely to change over the next year?

- Spending change over past year as reported in 2014
- Spending change over past year as reported in 2015
- Anticipated 2016 spending change

Note: Refer to page 18 of the 2015 Global Review for global averages.
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?

- Performance change over past year as reported in 2014
- Performance change over past year as reported in 2015

Note: Refer to page 19 of the 2015 Global Review for global averages.

* 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?

FACTORS DRIVING OR INHIBITING DDMA
To what extent are each of the following factors driving or inhibiting your (or your clients’) investment in DDMA?

France Index

Global Index
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?

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not limit at all</td>
<td>Somewhat limit</td>
<td>Substantially limit</td>
<td>8.7%</td>
<td>8.0%</td>
</tr>
</tbody>
</table>

PERSPECTIVES ON REGULATION

To what extent do you agree or disagree with the following statements?

- Good marketing data governance represents a competitive advantage for its practitioners.
- I fear that increased regulation of the use of marketing data in my market will negatively affect my business.
- Practicing data-driven marketing is easier in my market than in others.
- Regulations for marketing data use should be standardized across markets.

Note: Refer to page 23 of the 2015 Global Review for global averages.
What do practitioners need to derive greater value from DDMA?

DERIVING VALUE FROM PROGRAMS

How important would each of the following be in advancing your (or your clients’) ability to derive value from your DDMA programs?

- Better understanding of DDMA and its contribution among senior stakeholders
- Better integration between advertising and marketing technology platforms
- More/better staff training with respect to digital marketing programs/execution
- Improved campaign measurement and attribution tools
- Improved access to quality audience data
- Better understanding of DDMA and its contribution among service stakeholders
- Improved organizational processes (including incentive structures and data-sharing policies)
- More/better staff training with respect to analytics, segmentation and targeting
Germany
Germany

PANEL: 291 TOTAL RESPONDENTS*
SURVEY TIMEFRAME: JULY – AUGUST 2015

* Not all respondents answered every question

PANEL COMPOSITION
How would you describe your principal role/business focus?

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.

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

Displaying panelists’ “top three” responses

PRESENTING ASSOCIATION
Founded in 1948, the Deutscher Dialogmarketing Verband (DDV), is the largest national affiliation of companies in the direct marketing industry in Europe, and one of the foremost associations in the marketing and communication sector in Germany. The goal of the DDV is to increase and communicate the attractiveness and acceptance of the direct marketing sector. 750 members, representing the entire marketing supply chain, promote quality assurance, and advance the promotion of young talent as well as the freedom of communication and dialog with consumers. For more information, please visit www.ddv.de
What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

DDMA PRACTICES
To what extent does your organization practice each of the following today?

- Not at all (1)
- To some extent (3)
- Sophisticated Practitioner (5)

Index scores were created by assigning scores of 1, 3 and 5 to the response choices, enabling the calculation of a weighted average on a 1-to-5 scale, with 1 indicating the use case is not practiced at all, and 5 indicating the use case is practiced in a sophisticated manner.

Germany Index

Global Index

A NOTE ABOUT INDEX SCORES

Various "index scores" will appear throughout this report, representing a weighted average of panelist response to questions geared at understanding the extent to which DDMA practitioners are emphasizing various initiatives, opportunities and tactical priorities. Where possible, country-specific index scores—as reported on a scale of 1-to-5—are provided along with their comparable "Global Index" benchmarks, as reported by the entirety of The Global Review’s 17-nation worldwide panel.

Note: Throughout this report, various references to “2014” and “2015” data are included to display and contrast responses provided to the same question asked in the 2014 and 2015 versions of The Global Review, respectively.
DDMA SOPHISTICATION

How sophisticated is your organization’s data-driven marketing and advertising (DDMA) approach?

<table>
<thead>
<tr>
<th>Score</th>
<th>Description</th>
<th>Germany Index</th>
<th>Global Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Not at all</td>
<td>10.0%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>sophisticated</td>
<td>12.2%</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>About average</td>
<td>24.5%</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Very sophisticated</td>
<td>24.0%</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>25.8%</td>
<td></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?

<table>
<thead>
<tr>
<th>Score</th>
<th>Description</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Not at all</td>
<td>0.0%</td>
<td>1.3%</td>
</tr>
<tr>
<td></td>
<td>confident</td>
<td>1.2%</td>
<td>0.9%</td>
</tr>
<tr>
<td>3</td>
<td>Somewhat</td>
<td>22.4%</td>
<td>9.2%</td>
</tr>
<tr>
<td>4</td>
<td>Extremely</td>
<td>29.4%</td>
<td>36.2%</td>
</tr>
<tr>
<td>5</td>
<td>confident</td>
<td>86.4%</td>
<td>50.2%</td>
</tr>
</tbody>
</table>
How are practitioners investing in DDMA? What returns are they generating?

SPENDING ON DDMA

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?

Note: Refer to page 16 of the 2015 Global Review for global averages
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 your (or your clients’) spending in each of the following data-driven marketing and advertising channels is likely to change over the next year?

- **Spending change over past year as reported in 2014**
- **Spending change over past year as reported in 2015**
- **Anticipated 2016 spending change**

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

Note: Refer to page 17 of the 2015 Global Review for global averages
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 your (or your clients’) spending on the following data-driven marketing and advertising campaign execution functions is likely to change over the next year?

- **Spending change over past year as reported in 2014**
- **Spending change over past year as reported in 2015**
- **Anticipated 2016 spending change**

**Note:** Refer to page 18 of the 2015 Global Review for global averages.
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?

- Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

Note: Refer to page 19 of the 2015 Global Review for global averages
What’s driving the practice of DDMA?
What’s inhibiting it?

FACTORs DRIVING OR INHIBITING DDMA
To what extent are each of the following factors driving or inhibiting your (or your clients’) investment in DDMA?

- Desire to be “customer-centric”
- Potential future regulatory guidelines (e.g. with respect to consumer privacy/data security, etc.)
- Desire to align with consumer media preferences
- Providing regulatory guidelines (e.g. with respect to consumer privacy/data security, etc.)
- Availability/usability of advertising and marketing technology
- Availability of necessary talent/marketing expertise
- Current business processes within my (or my clients’) organization
- General economic conditions in our market
- Availability/usability of third-party audience data
- Availability/usability of for purchase or license
- Potential future regulatory guidelines (e.g. with respect to consumer privacy, data security, etc.)
- Prevailing regulatory guidelines (e.g. with respect to consumer privacy/data security, etc.)
- Mandate from my company (or clients’) leadership
- Availability of necessary talent/marketing expertise

Germany Index
Global Index
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?

PERSPECTIVES ON REGULATION

To what extent do you agree or disagree with the following statements?

Note: Refer to page 23 of the 2015 Global Review for global averages
What do practitioners need to derive greater value from DDMA?

DERIVING VALUE FROM PROGRAMS

How important would each of the following be in advancing your (or your clients’) ability to derive value from your DDMA programs?

[Graph showing importance ratings]

- Improved campaign measurement and attribution tools
- Better understanding of DDMA and its contribution among senior stakeholders
- Improved access to quality audience data
- More/better staff training with respect to analytics, segmentation and targeting
- Enhanced support from agency(ies) and other service providers
- More/better staff training with respect to digital marketing programs/execution
- More/better staff training with respect to marketing and advertising technology
- Improved organizational processes (including incentive structures and data-sharing policies)
- Improved access to digital ad technology platforms
Hong Kong
**Hong Kong**

**PANEL:**
25 TOTAL RESPONDENTS*

**SURVEY TIMEFRAME:**
JULY – AUGUST 2015

* Not all respondents answered every question

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**MARKETER/ADVERTISER:** 32.0%

**PUBLISHER/MEDIA:** 4.0%
(focused on selling advertising)

**PROVIDER OF MARKETING SERVICES:** 56.0%
(including data and agency services)

**DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY:** 4.0%

**OTHER:** 4.0%

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**PANEL COMPOSITION**
How would you describe your principal role/business focus?

---

**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:** 0.0%
- **1-5 years:** 24.0%
- **6-10 years:** 32.0%
- **11-15 years:** 16.0%
- **16-25 years:** 16.0%
- **> 25 years:** 12.0%

---

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

Displaying panelists’ “top three” responses

- **Automotive:** 25.0%
- **Business-to-business services ("B2B"):** 37.5%
- **Consumer goods ("FMCG" or "CPG"):** 25.0%
- **Entertainment, media and/or publishing:** 0.0%
- **Financial services (banking, credit cards, investments, etc.):** 0.0%
- **Government:** 0.0%
- **Healthcare and/or pharmaceuticals:** 0.0%
- **Insurance:** 0.0%
- **Manufacturing:** 25.0%
- **Not-for-profit/charities:** 0.0%
- **Retail—predominantly “brick-and-mortar” stores:** 0.0%
- **Retail—predominantly catalog and/or e-commerce:** 12.5%
- **Technology:** 0.0%
- **Telecommunications:** 0.0%
- **Travel and hospitality:** 25.0%
- **Utilities:** 0.0%
- **Other:** 12.5%

---

**PRESENTING ASSOCIATION**
The Digital + Direct Marketing Association Asia [D+D] promotes the effective use of digital and direct marketing across Asia Pacific. Our leadership and members include many of the region’s senior leaders and companies from across the marketing ecosystem including marketers, publishers, agencies, research and technology solutions providers.

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What is Data-Driven Marketing and Advertising (DDMA)?
How is the practice evolving?

DDMA PRACTICES

To what extent does your organization practice each of the following today?

- Not at all (1)
- To some extent (3)
- Sophisticated Practitioner (5)

<table>
<thead>
<tr>
<th>Practice</th>
<th>Not at All</th>
<th>To Some Extent</th>
<th>Sophisticated Practitioner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase third-party data (e.g. mailing lists, digital behavioral data, etc.) to support targeted marketing campaigns</td>
<td>17.6%</td>
<td>44.1%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Maintain databases to host information on customers and/or prospects</td>
<td>0.0%</td>
<td>0.0%</td>
<td>41.2%</td>
</tr>
<tr>
<td>Segment data so as to better target and engage addressable consumer (and/or B-to-B) audiences</td>
<td>5.9%</td>
<td>5.9%</td>
<td>38.2%</td>
</tr>
<tr>
<td>Measure campaign results across individual marketing channels (e.g. only in one type of campaign, such as direct mail)</td>
<td>5.9%</td>
<td>20.6%</td>
<td>26.5%</td>
</tr>
<tr>
<td>Measure campaign results across multiple marketing channels (e.g. supporting media mix allocation and customer segmentation across multiple channels, such as direct mail, email and digital advertising)</td>
<td>20.6%</td>
<td>32.4%</td>
<td>8.8%</td>
</tr>
</tbody>
</table>

Note: Throughout this report, various references to “2014” and “2015” data are included to display and contrast responses provided to the same question asked in the 2014 and 2015 versions of The Global Review, respectively.
DDMA SOPHISTICATION
How sophisticated is your organization’s data-driven marketing and advertising (DDMA) approach?

<table>
<thead>
<tr>
<th>Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not at all</td>
<td>0.0%</td>
</tr>
<tr>
<td>sophisticated</td>
<td>28.6%</td>
</tr>
<tr>
<td>About average</td>
<td>19.0%</td>
</tr>
<tr>
<td>Sophisticated</td>
<td>42.9%</td>
</tr>
<tr>
<td>Very sophisticated</td>
<td>4.8%</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?

<table>
<thead>
<tr>
<th>Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not at all</td>
<td>0.0%</td>
</tr>
<tr>
<td>Confident</td>
<td>0.0%</td>
</tr>
<tr>
<td>Somewhat</td>
<td>0.0%</td>
</tr>
<tr>
<td>Confident</td>
<td>28.6%</td>
</tr>
<tr>
<td>Extremely</td>
<td>42.9%</td>
</tr>
<tr>
<td>Confident</td>
<td>28.6%</td>
</tr>
</tbody>
</table>
How are practitioners investing in DDMA? What returns are they generating?

SPENDING ON DDMA

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?

Note: Refer to page 16 of the 2015 Global Review for global averages.
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 your (or your clients’) spending in each of the following data-driven marketing and advertising channels is likely to change over the next year?

- **Spending change over past year as reported in 2015**
- **Anticipated 2016 spending change**

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

Note: Refer to page 17 of the 2015 Global Review for global averages
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 your (or your clients’) spending on the following data-driven marketing and advertising campaign execution functions is likely to change over the next year?

- Spending change over past year as reported in 2015
- Anticipated 2016 spending change

Note: Refer to page 18 of the 2015 Global Review for global averages.
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?

Performance change over past year as reported in 2015

Note: Refer to page 19 of the 2015 Global Review for global averages

* 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?

FACTORS DRIVING OR INHIBITING DDMA
To what extent are each of the following factors driving or inhibiting your (or your clients’) investment in DDMA?

Hong Kong Index  Global Index

1.0  2.0  3.0  4.0  5.0

Driving investment a great deal

Neither driving nor inhibiting

Inhibiting investment a great deal

- Desire to be “customer-centric”
- Desire to align with consumer media preferences
- Mandate from my company (or client’s) leadership
- Availability/usefulness of third-party audience data for purchase or license
- Availability/usefulness of advertising and marketing technology
- Current business processes within my organization
- Availability of necessary talent/marketing expertise
- Prevailing regulatory guidelines (e.g., with respect to consumer privacy/data security, etc.)
- Potential future regulatory guidelines (e.g., with respect to consumer privacy/data security, etc.)
- General economic conditions in our market
- Availability/usefulness of advertising and marketing technology
- Availability of necessary talent/marketing expertise
- Current business processes within my organization
- Mandate from my company (or client’s) leadership
- Desire to align with consumer media preferences
- Desire to be “customer-centric”
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?

PERSPECTIVES ON REGULATION

To what extent do you agree or disagree with the following statements?

- Good marketing data governance represents a competitive advantage for its practitioners.
- I fear that increased regulation of the use of marketing data in my market will negatively affect my business.
- Practicing data-driven marketing is easier in my market than in others.
- Regulations for marketing data use should be standardized across markets.

Note: Refer to page 23 of the 2015 Global Review for global averages
What do practitioners need to derive greater value from DDMA?

DERIVING VALUE FROM PROGRAMS

How important would each of the following be in advancing your (or your clients’) ability to derive value from your DDMA programs?

Hong Kong Index  Global Index

<table>
<thead>
<tr>
<th>Topic</th>
<th>Hong Kong Index</th>
<th>Global Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better understanding of DDMA and its contribution among senior stakeholders</td>
<td>4.17</td>
<td>4.10</td>
</tr>
<tr>
<td>Improved campaign measurement and attribution tools</td>
<td>4.17</td>
<td>4.17</td>
</tr>
<tr>
<td>Improved access to quality audience data</td>
<td>4.08</td>
<td>4.03</td>
</tr>
<tr>
<td>Enhanced support from agency(ies) and other service providers</td>
<td>3.73</td>
<td>3.77</td>
</tr>
<tr>
<td>More/better staff training with respect to analytics</td>
<td>4.22</td>
<td>3.82</td>
</tr>
<tr>
<td>Improved organizational processes in planning, execution, and data-sharing policies</td>
<td>4.00</td>
<td>4.22</td>
</tr>
<tr>
<td>More/better staff training with respect to marketing and advertising technology</td>
<td>3.92</td>
<td>4.09</td>
</tr>
<tr>
<td>More/better staff training with respect to analytics, segmentation and targeting</td>
<td>4.08</td>
<td>4.09</td>
</tr>
<tr>
<td>More/better staff training with respect to analytics, segmentation and targeting</td>
<td>4.09</td>
<td>4.09</td>
</tr>
<tr>
<td>More/better staff training with respect to digital marketing</td>
<td>4.42</td>
<td>4.24</td>
</tr>
<tr>
<td>Improved campaign measurement and attribution tools</td>
<td>4.00</td>
<td>4.12</td>
</tr>
<tr>
<td>Better understanding of DDMA and its contribution among senior stakeholders</td>
<td>4.03</td>
<td>4.09</td>
</tr>
<tr>
<td>Improved campaign measurement and attribution tools</td>
<td>4.17</td>
<td>4.17</td>
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</tr>
<tr>
<td>More/better staff training with respect to analytics</td>
<td>4.22</td>
<td>3.82</td>
</tr>
</tbody>
</table>
Hungary
**Hungary**

**Panel:**
38 Total Respondents*

**Survey Timeframe:**
July – August 2015

* Not all respondents answered every question

---

**Panel Composition**
How would you describe your principal role/business focus?

- **Marketer/Advertiser:** 36.8%
- **Publisher/Media:** 7.9%
  (focused on selling advertising)
- **Provider of Marketing Services:** 39.5%
  (including data and agency services)
- **Developer of Advertising & Marketing Technology:** 5.3%
- **Other:** 10.5%

---

**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:** 8.1%
- **1-5 years:** 27.0%
- **6-10 years:** 18.9%
- **11-15 years:** 21.6%
- **16-25 years:** 18.9%
- **>25 years:** 2.7%

---

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

Displaying panelists’ “top three” responses

- **Automotive:** 7.7%
- **Business-to-business services (“B2B”):** 7.7%
- **Consumer goods (“FMCG” or “CPG”):** 15.4%
- **Entertainment, media and/or publishing:** 7.7%
- **Financial services (banking, credit cards, investments, etc.):** 7.7%
- **Government:** 0.0%
- **Healthcare and/or pharmaceuticals:** 15.4%
- **Insurance:** 0.0%
- **Manufacturing:** 15.4%
- **Not-for-profit/charities:** 7.7%
- **Retail—predominately “brick-and-mortar” stores:** 7.7%
- **Retail—predominately catalog and/or e-commerce:** 7.7%
- **Technology:** 7.7%
- **Telecommunications:** 7.7%
- **Travel and hospitality:** 7.7%
- **Utilities:** 0.0%
- **Other:** 0.0%

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**Presenting Association**
The Direkt és Interaktív Marketing Szövetség (dmsz) is the main professional direct communication association within Hungary where direct marketing providers, agencies and advertisers come together and work to strengthen the reputation of the sector and establish industry trends. The Association provides research and case studies in order to advance knowledge for both beginners and senior professionals. For more information, please visit www.dimsz.hu
What is Data-Driven Marketing and Advertising (DDMA)?
How is the practice evolving?

DDMA PRACTICES

To what extent does your organization practice each of the following today?

- Not at all (1)
- To some extent (3)
- Sophisticated Practitioner (5)

Index scores were created by assigning scores of 1, 3 and 5 to the response choices, enabling the calculation of a weighted average on a 1-to-5 scale, with 1 indicating the use case is not practiced at all, and 5 indicating the use case is practiced in a sophisticated manner.

A NOTE ABOUT INDEX SCORES

Various “index scores” will appear throughout this report, representing a weighted average of panelist response to questions geared at understanding the extent to which DDMA practitioners are emphasizing various initiatives, opportunities and tactical priorities. Where possible, country-specific index scores—as reported on a scale of 1-to-5—are provided along with their comparable “Global Index” benchmarks, as reported by the entirety of The Global Review’s 17-nation worldwide panel.

Note: Throughout this report, various references to “2014” and “2015” data are included to display and contrast responses provided to the same question asked in the 2014 and 2015 versions of The Global Review, respectively.
DDMA SOPHISTICATION

How sophisticated is your organization’s data-driven marketing and advertising (DDMA) approach?

![Bar chart showing the distribution of sophistication levels, with 53.5% at level 5, 46.4% at level 4, 25.0% at level 3, 17.9% at level 2, and 3.6% at level 1.]

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?

![Bar chart showing the confidence levels, with 60.7% at level 5, 35.7% at level 4, 25.0% at level 3, 15.0% at level 2, and 5.0% at level 1.]

© 2015 GDMA LLC and Winterberry Group LLC
How are practitioners investing in DDMA? What returns are they generating?

SPENDING ON DDMA

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?

- The past year
- The coming year
- Hungary Index (2014)
- Hungary Index (2015)

Note: Refer to page 16 of the 2015 Global Review for global averages
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 your (or your clients’) spending in each of the following data-driven marketing and advertising channels is likely to change over the next year?

- Spending change over past year as reported in 2014
- Spending change over past year as reported in 2015
- Anticipated 2016 spending change

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

Note: Refer to page 17 of the 2015 Global Review for global averages
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 your (or your clients’) spending on the following data-driven marketing and advertising campaign execution functions is likely to change over the next year?

- **Spending change over past year as reported in 2014**
- **Spending change over past year as reported in 2015**
- **Anticipated 2016 spending change**

Note: Refer to page 18 of the 2015 Global Review for global averages
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?

- Performance change over past year as reported in 2014
- Performance change over past year as reported in 2015

Channel performance

- Improved substantially
- No material change
- Declined substantially

Note: Refer to page 19 of the 2015 Global Review for global averages
What’s driving the practice of DDMA? What’s inhibiting it?

FACTORS DRIVING OR INHIBITING DDMA

To what extent are each of the following factors driving or inhibiting your (or your clients’) investment in DDMA?

[Diagram showing factors driving or inhibiting DDMA with specific scores for Hungary and the global index.]
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?


PERSPECTIVES ON REGULATION

To what extent do you agree or disagree with the following statements?

- Good marketing data governance represents a competitive advantage for its practitioners.
- I fear that increased regulation of the use of marketing data in my market will negatively affect my business.
- Practicing data-driven marketing is easier in my market than in others.
- Regulations for marketing data use should be standardized across markets.

Note: Refer to page 23 of the 2015 Global Review for global averages
What do practitioners need to derive greater value from DDMA?

DERIVING VALUE FROM PROGRAMS

How important would each of the following be in advancing your (or your clients’) ability to derive value from your DDMA programs?

- Better understanding of DDMA and its contribution among senior stakeholders
- Improved campaign measurement tools
- Better integration between advertising and marketing technology platforms
- More/better staff training with respect to analytics, segmentation and targeting
- Improved access to quality audience data
- Improved access to, organizing processes and data sharing policies
- More/better staff training with respect to digital marketing programs/execution
- More/better staff training with respect to marketing and advertising technology
- Improved access to, organizing processes and data sharing policies
- Enhanced support from agency and other service providers

Hungary Index

Global Index
India
**Panel Composition**

How would you describe your principal role/business focus?

- **MARKETER/ADVERTISER**: 52.2%
- **PUBLISHER/MEDIA**: 5.4% (focused on selling advertising)
- **PROVIDER OF MARKETING SERVICES**: 22.8% (including data and agency services)
- **DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY**: 2.2%
- **OTHER**: 17.4%

**Experience**

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

- < 1 year: 3.3%
- 1-5 years: 12.1%
- 6-10 years: 12.1%
- 11-15 years: 26.4%
- 16-25 years: 26.4%
- > 25 years: 17.6%

**Industry Representation**

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

Displaying panelists’ “top three” responses:

- **Automotive**: 6.3%
- **Business-to-business services (“B2B”)**: 25.0%
- **Consumer goods (“FMCG” or “CPG”)**: 10.4%
- **Entertainment, media and/or publishing**: 6.3%
- **Financial services (banking, credit cards, investments, etc.)**: 33.3%
- **Government**: 2.1%
- **Healthcare and/or pharmaceuticals**: 10.4%
- **Insurance**: 18.8%
- **Manufacturing**: 2.1%
- **Not-for-profit/charities**: 4.2%
- **Retail—predominately “brick-and-mortar” stores**: 12.5%
- **Retail—predominately catalog and/or e-commerce**: 6.3%
- **Technology**: 18.8%
- **Telecommunications**: 6.3%
- **Travel and hospitality**: 4.2%
- **Utilities**: 0.0%
- **Other**: 6.3%
What is Data-Driven Marketing and Advertising (DDMA)?
How is the practice evolving?

DDMA PRACTICES
To what extent does your organization practice each of the following today?

- Not at all (1)
- To some extent (3)
- Sophisticated Practitioner (5)

Index scores were created by assigning scores of 1, 3 and 5 to the response choices, enabling the calculation of a weighted average on a 1-to-5 scale, with 1 indicating the use case is not practiced at all, and 5 indicating the use case is practiced in a sophisticated manner.

A NOTE ABOUT INDEX SCORES
Various “index scores” will appear throughout this report, representing a weighted average of panelist response to questions geared at understanding the extent to which DDMA practitioners are emphasizing various initiatives, opportunities and tactical priorities. Where possible, country-specific index scores—as reported on a scale of 1-to-5—are provided along with their comparable “Global Index” benchmarks, as reported by the entirety of The Global Review’s 17-nation worldwide panel.

Note: Throughout this report, various references to “2014” and “2015” data are included to display and contrast responses provided to the same question asked in the 2014 and 2015 versions of The Global Review, respectively.
DDMA SOPHISTICATION

How sophisticated is your organization’s data-driven marketing and advertising (DDMA) approach?

<table>
<thead>
<tr>
<th>Level</th>
<th>2014</th>
<th>2015</th>
<th>India Index</th>
<th>Global Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Not at all sophisticated</td>
<td>4.6%</td>
<td>10.3%</td>
<td>4.37</td>
<td>3.60</td>
</tr>
<tr>
<td>2 About average</td>
<td>26.4%</td>
<td>37.9%</td>
<td>4.6%</td>
<td>37.9%</td>
</tr>
<tr>
<td>3 Very sophisticated</td>
<td>20.7%</td>
<td>58.6%</td>
<td>4.48</td>
<td>4.89</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?

<table>
<thead>
<tr>
<th>Level</th>
<th>2014</th>
<th>2015</th>
<th>India Index</th>
<th>Global Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Not at all confident</td>
<td>0.7%</td>
<td>2.3%</td>
<td>0.7%</td>
<td>2.3%</td>
</tr>
<tr>
<td>2 Somewhat confident</td>
<td>1.5%</td>
<td>4.6%</td>
<td>1.5%</td>
<td>4.6%</td>
</tr>
<tr>
<td>3 Extremely confident</td>
<td>17.2%</td>
<td>22.8%</td>
<td>17.2%</td>
<td>22.8%</td>
</tr>
</tbody>
</table>
How are practitioners investing in DDMA? What returns are they generating?

**SPENDING ON DDMA**

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?

<table>
<thead>
<tr>
<th>The past year</th>
<th>The coming year</th>
<th>India Index (2014)</th>
<th>India Index (2015)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.</strong> Decrease(d) significantly</td>
<td><strong>2.</strong> No change</td>
<td><strong>3.</strong> Increase(d) significantly</td>
<td><strong>4.</strong> Decrease(d) significantly</td>
</tr>
<tr>
<td>1.3%</td>
<td>0.0%</td>
<td>10.0%</td>
<td>46.8%</td>
</tr>
</tbody>
</table>

Note: Refer to page 16 of the 2015 Global Review for global averages
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 your (or your clients’) spending in each of the following data-driven marketing and advertising channels is likely to change over the next year?

- Spending change over past year as reported in 2014
- Spending change over past year as reported in 2015
- Anticipated 2016 spending change

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

Note: Refer to page 17 of the 2015 Global Review for global averages
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 your (or your clients’) spending on the following data-driven marketing and advertising campaign execution functions is likely to change over the next year?

<table>
<thead>
<tr>
<th>Function</th>
<th>Spending change over past year as reported in 2014</th>
<th>Spending change over past year as reported in 2015</th>
<th>Anticipated 2016 spending change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audience analytics/measurement and attribution (including web analytics)</td>
<td><img src="image" alt="Graph" /></td>
<td><img src="image" alt="Graph" /></td>
<td><img src="image" alt="Graph" /></td>
</tr>
<tr>
<td>Creative and content development</td>
<td><img src="image" alt="Graph" /></td>
<td><img src="image" alt="Graph" /></td>
<td><img src="image" alt="Graph" /></td>
</tr>
<tr>
<td>Customer contact/support (including call center, social media engagement)</td>
<td><img src="image" alt="Graph" /></td>
<td><img src="image" alt="Graph" /></td>
<td><img src="image" alt="Graph" /></td>
</tr>
<tr>
<td>Database management (including call center, social media engagement)</td>
<td><img src="image" alt="Graph" /></td>
<td><img src="image" alt="Graph" /></td>
<td><img src="image" alt="Graph" /></td>
</tr>
<tr>
<td>Data compilation, sourcing and brokerage</td>
<td><img src="image" alt="Graph" /></td>
<td><img src="image" alt="Graph" /></td>
<td><img src="image" alt="Graph" /></td>
</tr>
<tr>
<td>Digital campaign execution (Web and mobile)</td>
<td><img src="image" alt="Graph" /></td>
<td><img src="image" alt="Graph" /></td>
<td><img src="image" alt="Graph" /></td>
</tr>
<tr>
<td>Predictive analytics/modeling and segmentation</td>
<td><img src="image" alt="Graph" /></td>
<td><img src="image" alt="Graph" /></td>
<td><img src="image" alt="Graph" /></td>
</tr>
<tr>
<td>Traditional campaign execution (print, mailing, fulfillment, etc.)</td>
<td><img src="image" alt="Graph" /></td>
<td><img src="image" alt="Graph" /></td>
<td><img src="image" alt="Graph" /></td>
</tr>
</tbody>
</table>

Note: Refer to page 18 of the 2015 Global Review for global averages.
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?

- Performance change over past year as reported in 2014
- Performance change over past year as reported in 2015

[Graph showing channel performance scores]

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

Note: Refer to page 19 of the 2015 Global Review for global averages
What’s driving the practice of DDMA?
What’s inhibiting it?

FACTORS DRIVING OR INHIBITING DDMA
To what extent are each of the following factors driving or inhibiting your (or your clients’) investment in DDMA?

Driving investment a great deal

Neither driving nor inhibiting

Inhibiting investment a great deal

Desire to be “customer-centric”
Desire to align with consumer media preferences
Availability/usefulness of advertising and marketing technology
Current business processes within my (or my clients’) organization
Mandate from my company (or clients’) leadership
Availability of necessary talent/marketing expertise
Potential future regulatory guidelines (e.g., with respect to consumer privacy, data security, etc.)
Prevailing regulatory guidelines (e.g., with respect to consumer privacy, data security, etc.)
General economic conditions in our market
Availability/usefulness of advertising and marketing technology
Desire to align with consumer media preferences
Desire to be “customer-centric”

India Index
Global Index
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?

![Impact of Regulation Chart]

PERSPECTIVES ON REGULATION

To what extent do you agree or disagree with the following statements?

![Perspectives on Regulation Chart]

Note: Refer to page 23 of the 2015 Global Review for global averages
What do practitioners need to derive greater value from DDMA?

DERIVING VALUE FROM PROGRAMS

How important would each of the following be in advancing your (or your clients’) ability to derive value from your DDMA programs?
ITALY

PANEL:
168 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY – SEPTEMBER 2015

* Not all respondents answered every question

PANEL COMPOSITION
How would you describe your principal role/business focus?

- MARKETER/ADVERTISER: 32.7%
- PUBLISHER/MEDIA: 4.8%
  (focused on selling advertising)
- PROVIDER OF MARKETING SERVICES: 38.7%
  (including data and agency services)
- DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY: 8.3%
- OTHER: 15.5%

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: 3.0%
- 1-5 years: 9.8%
- 6-10 years: 18.3%
- 11-15 years: 23.8%
- 16-25 years: 22.6%
- > 25 years: 22.6%

INDUSTRY REPRESENTATION
Within which of the following vertical markets are your professional efforts most intensively concentrated?
Displaying panelists’ “top three” responses

- Automotive: 34.0%
- Business-to-business services (“B2B”): 13.2%
- Consumer goods (“FMCG” or “CPG”): 9.4%
- Entertainment, media and/or publishing: 15.1%
- Financial services (banking, credit cards, investments, etc.): 13.2%
- Government: 1.9%
- Healthcare and/or pharmaceuticals: 9.4%
- Insurance: 5.7%
- Manufacturing: 5.7%
- Not-for-profit/charities: 18.9%
- Retail—predominately “brick-and-mortar” stores: 11.3%
- Retail—predominately catalog and/or e-commerce: 1.9%
- Technology: 17.0%
- Telecommunications: 3.8%
- Travel and hospitality: 5.7%
- Utilities: 9.4%
- Other: 5.7%

PRESENTING ASSOCIATION
DMA Italy is the Italian Affiliate of DMA International. It gathers companies and not-for-profit organizations which use direct and data-driven marketing tools and techniques for their communication. For more information, please visit: www.dmaitalia.it

DMA ITALIA
Association for Direct and Data Driven Marketing
What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

DDMA PRACTICES

To what extent does your organization practice each of the following today?

- Not at all (1)
- To some extent (3)
- Sophisticated Practitioner (5)

Index scores were created by assigning scores of 1, 3 and 5 to the response choices, enabling the calculation of a weighted average on a 1-to-5 scale, with 1 indicating the use case is not practiced at all, and 5 indicating the use case is practiced in a sophisticated manner.

A NOTE ABOUT INDEX SCORES

Various “index scores” will appear throughout this report, representing a weighted average of panelist response to questions geared at understanding the extent to which DDMA practitioners are emphasizing various initiatives, opportunities and tactical priorities. Where possible, country-specific index scores—as reported on a scale of 1-to-5—are provided along with their comparable “Global Index” benchmarks, as reported by the entirety of The Global Review’s 17-nation worldwide panel.

Note: Throughout this report, various references to “2014” and “2015” data are included to display and contrast responses provided to the same question asked in the 2014 and 2015 versions of The Global Review, respectively.
DDMA SOPHISTICATION

How sophisticated is your organization’s data-driven marketing and advertising (DDMA) approach?

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?
How are practitioners investing in DDMA? What returns are they generating?

SPENDING ON DDMA

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?

The past year The coming year Italy Index (2014) Italy Index (2015)

Note: Refer to page 16 of the 2015 Global Review for global averages
**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 your (or your clients’) spending in each of the following data-driven marketing and advertising channels is likely to change over the **next year**?

<table>
<thead>
<tr>
<th>Channel</th>
<th>Spending change over past year as reported in 2014</th>
<th>Spending change over past year as reported in 2015</th>
<th>Anticipated 2016 spending change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Addressable TV</td>
<td>2.59</td>
<td>2.90</td>
<td>3.14</td>
</tr>
<tr>
<td>Digital display advertising*</td>
<td>3.10</td>
<td>3.24</td>
<td>3.46</td>
</tr>
<tr>
<td>Digital out-of-home</td>
<td>3.11</td>
<td>3.27</td>
<td>3.49</td>
</tr>
<tr>
<td>Direct mail</td>
<td>3.29</td>
<td>3.48</td>
<td>3.65</td>
</tr>
<tr>
<td>Email</td>
<td>3.10</td>
<td>3.10</td>
<td>3.32</td>
</tr>
<tr>
<td>Mobile apps/content, SMS</td>
<td>3.29</td>
<td>3.26</td>
<td>3.43</td>
</tr>
<tr>
<td>Search (SEO/SEM)</td>
<td>3.46</td>
<td>3.58</td>
<td>3.87</td>
</tr>
<tr>
<td>Social media/management/content</td>
<td>3.44</td>
<td>3.69</td>
<td>3.93</td>
</tr>
<tr>
<td>Teleservices/contact centers</td>
<td>2.95</td>
<td>3.03</td>
<td>3.28</td>
</tr>
<tr>
<td>Web content (website optimization)</td>
<td>3.29</td>
<td>3.30</td>
<td>3.37</td>
</tr>
</tbody>
</table>

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

Note: Refer to page 17 of the 2015 *Global Review* for global averages

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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 your (or your clients’) spending on the following data-driven marketing and advertising campaign execution functions is likely to change over the next year?

- **Spending change over past year as reported in 2014**
- **Spending change over past year as reported in 2015**
- **Anticipated 2016 spending change**

Note: Refer to page 18 of the 2015 Global Review for global averages.
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?

- Performance change over past year as reported in 2014
- Performance change over past year as reported in 2015

Note: Refer to page 19 of the 2015 Global Review for global averages
What’s driving the practice of DDMA?
What’s inhibiting it?

FACTORS DRIVING OR INHIBITING DDMA

To what extent are each of the following factors driving or inhibiting your (or your clients’) investment in DDMA?

Italy Index

<table>
<thead>
<tr>
<th>Factor</th>
<th>Italy Index</th>
<th>Global Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desire to be &quot;customer-centric&quot;</td>
<td>3.88</td>
<td>4.00</td>
</tr>
<tr>
<td>Desire to align with consumer preferences</td>
<td>4.00</td>
<td>3.83</td>
</tr>
<tr>
<td>Availability/usability of advertising and marketing technology</td>
<td>3.56</td>
<td>4.00</td>
</tr>
<tr>
<td>Availability of necessary talent/marketing expertise</td>
<td>3.46</td>
<td>3.46</td>
</tr>
<tr>
<td>Mandate from my company (or clients’) leadership</td>
<td>3.12</td>
<td>2.70</td>
</tr>
<tr>
<td>Current business processes in my (or my clients’) organization</td>
<td>3.46</td>
<td>3.46</td>
</tr>
<tr>
<td>General economic conditions in our market</td>
<td>3.56</td>
<td>3.46</td>
</tr>
<tr>
<td>Availability/usability of consumer privacy, data security, etc.</td>
<td>3.46</td>
<td>2.83</td>
</tr>
<tr>
<td>Mandate from my company (or clients’) leadership</td>
<td>3.12</td>
<td>2.70</td>
</tr>
<tr>
<td>Potential future regulatory guidelines (e.g., with respect to consumer privacy, data security, etc.)</td>
<td>3.46</td>
<td>2.83</td>
</tr>
<tr>
<td>Prevailing regulatory guidelines (e.g., with respect to consumer privacy, data security, etc.)</td>
<td>3.56</td>
<td>2.70</td>
</tr>
</tbody>
</table>
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?

PERSPECTIVES ON REGULATION

To what extent do you agree or disagree with the following statements?

- Good marketing data governance represents a competitive advantage for its practitioners.
- I fear that increased regulation of the use of marketing data in my market will negatively affect my business.
- Practicing data-driven marketing is easier in my market than in others.
- Regulations for marketing data use should be standardized across markets.

Note: Refer to page 23 of the 2015 Global Review for global averages.
What do practitioners need to derive greater value from DDMA?

DERIVING VALUE FROM PROGRAMS

How important would each of the following be in advancing your (or your clients’) ability to derive value from your DDMA programs?

<table>
<thead>
<tr>
<th>Critical importance to derive value</th>
<th>Neutral importance</th>
<th>Not at all important to derive value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better understanding of DDMA and its contribution among senior stakeholders</td>
<td>Better integration between advertising and marketing technology platforms</td>
<td>More/better staff training with respect to digital marketing programs/execution</td>
</tr>
<tr>
<td>4.42</td>
<td>4.00</td>
<td>3.96</td>
</tr>
<tr>
<td>4.20</td>
<td>4.11</td>
<td>4.12</td>
</tr>
<tr>
<td>3.97</td>
<td>4.09</td>
<td>4.03</td>
</tr>
<tr>
<td>3.39</td>
<td>3.87</td>
<td>4.22</td>
</tr>
<tr>
<td>3.67</td>
<td>4.05</td>
<td>4.21</td>
</tr>
<tr>
<td>3.86</td>
<td>4.03</td>
<td>4.22</td>
</tr>
<tr>
<td>4.03</td>
<td>4.03</td>
<td>4.22</td>
</tr>
<tr>
<td>3.86</td>
<td>4.03</td>
<td>4.22</td>
</tr>
<tr>
<td>3.39</td>
<td>4.03</td>
<td>4.22</td>
</tr>
</tbody>
</table>
Netherlands
Netherlands

PANEL:
142 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY – SEPTEMBER 2015

* Not all respondents answered every question

PRESENTING ASSOCIATION
The DDMA is the trade organization for data-driven marketing and advertising in the Netherlands. DDMA represents the interests of users, service providers and media/carriers of data-driven marketing, both in the Netherlands and across Europe. With 275 member organizations, DDMA acts as a leading communication and knowledge platform for professionals in marketing. For more information, please visit www.ddma.nl

PANEL COMPOSITION
How would you describe your principal role/business focus?

- MARKETER/ADVERTISER: 36.6%
- PUBLISHER/MEDIA: 2.1% (focused on selling advertising)
- PROVIDER OF MARKETING SERVICES: 40.1% (including data and agency services)
- DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY: 9.2%
- OTHER: 12.0%

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: 0.7%
- 1-5 years: 19.4%
- 6-10 years: 26.1%
- 11-15 years: 29.1%
- 16-25 years: 19.4%
- > 25 years: 4.5%

INDUSTRY REPRESENTATION
Within which of the following vertical markets are your professional efforts most intensively concentrated?
Displaying panelists’ “top three” responses

- Automotive: 6.4%
- Business-to-business services (“B2B”): 21.3%
- Consumer goods (“FMCG” or “CPG”): 6.4%
- Entertainment, media and/or publishing: 4.3%
- Financial services (banking, credit cards, investments, etc.): 8.5%
- Government: 4.3%
- Healthcare and/or pharmaceuticals: 2.1%
- Insurance: 4.3%
- Manufacturing: 0.0%
- Not-for-profit/charities: 25.5%
- Retail—predominately “brick-and-mortar” stores: 6.4%
- Retail—predominately catalog and/or e-commerce: 4.3%
- Technology: 8.5%
- Telecommunications: 8.5%
- Travel and hospitality: 12.8%
- Utilities: 8.5%
- Other: 8.5%
What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

DDMA PRACTICES
To what extent does your organization practice each of the following today?

- Not at all (1)
- To some extent (3)
- Sophisticated Practitioner (5)

Index scores were created by assigning scores of 1, 3 and 5 to the response choices, enabling the calculation of a weighted average on a 1-to-5 scale, with 1 indicating the use case is not practiced at all, and 5 indicating the use case is practiced in a sophisticated manner.

Note: Throughout this report, various references to “2014” and “2015” data are included to display and contrast responses provided to the same question asked in the 2014 and 2015 versions of The Global Review, respectively.

A NOTE ABOUT INDEX SCORES
Various “index scores” will appear throughout this report, representing a weighted average of panelist response to questions geared at understanding the extent to which DDMA practitioners are emphasizing various initiatives, opportunities and tactical priorities. Where possible, country-specific index scores—as reported on a scale of 1-to-5—are provided along with their comparable “Global Index” benchmarks, as reported by the entirety of The Global Review’s 17-nation worldwide panel.
DDMA SOPHISTICATION

How sophisticated is your organization’s data-driven marketing and advertising (DDMA) approach?

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not at all sophisticated</td>
<td>About average</td>
<td>Very sophisticated</td>
<td></td>
<td></td>
</tr>
<tr>
<td>0.0%</td>
<td>12.4%</td>
<td>22.9%</td>
<td>37.1%</td>
<td>27.6%</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?

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not at all confident</td>
<td>Somewhat confident</td>
<td>Extremely confident</td>
<td></td>
<td></td>
</tr>
<tr>
<td>0.6%</td>
<td>1.0%</td>
<td>0.6%</td>
<td>1.9%</td>
<td>17.5%</td>
</tr>
</tbody>
</table>

How are practitioners investing in DDMA? What returns are they generating?

SPENDING ON DDMA

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?

The past year The coming year Netherlands Index (2014) Netherlands Index (2015)

Note: Refer to page 16 of the 2015 Global Review for global averages
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 your (or your clients’) spending in each of the following data-driven marketing and advertising channels is likely to change over the next year?

- ▲ Spending change over past year as reported in 2014
- ▼ Spending change over past year as reported in 2015
- □ Anticipated 2016 spending change

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

Note: Refer to page 17 of the 2015 Global Review for global averages

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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 your (or your clients’) spending on the following data-driven marketing and advertising campaign execution functions is likely to change over the next year?

- Spending change over past year as reported in 2014
- Spending change over past year as reported in 2015
- Anticipated 2016 spending change

Note: Refer to page 18 of the 2015 Global Review for global averages
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?

- Performance change over past year as reported in 2014
- Performance change over past year as reported in 2015

Note: Refer to page 19 of the 2015 Global Review for global averages

* 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?

FACTORS DRIVING OR INHIBITING DDMA

To what extent are each of the following factors driving or inhibiting your (or your clients’) investment in DDMA?

- Desire to be “customer-centric”
- Availability/usefulness of advertising and marketing technology
- Availability of necessary talent/marketing expertise
- Desire to align with consumer media preferences
- Current business processes within my (or my clients’) organization
- Mandate from my company (or clients’) leadership
- Potential future regulatory guidelines (e.g., with respect to consumer privacy, data security, etc.)
- Prevailing regulatory guidelines (e.g., with respect to consumer privacy, data security, etc.)
- General economic conditions in our market
- Availability of necessary third-party audience data for purchase or license
- Prevailing regulatory guidelines (e.g., with respect to consumer privacy, data security, etc.)
- Potential future regulatory guidelines (e.g., with respect to consumer privacy, data security, etc.)
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?

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>2.0</td>
<td>3.0</td>
<td>4.0</td>
</tr>
<tr>
<td>2.0</td>
<td>11.8</td>
<td>16.2</td>
<td>45.0</td>
</tr>
<tr>
<td>3.0</td>
<td>49.0</td>
<td>5.0</td>
<td>23.5</td>
</tr>
<tr>
<td>4.0</td>
<td>18.9</td>
<td>9.9</td>
<td>31.3</td>
</tr>
<tr>
<td>5.0</td>
<td>2.0</td>
<td>7.8</td>
<td>28.8</td>
</tr>
<tr>
<td>Strongly agree</td>
<td>Strongly agree</td>
<td>Strongly agree</td>
<td>Strongly agree</td>
</tr>
<tr>
<td>5.0</td>
<td>4.0</td>
<td>3.0</td>
<td>2.0</td>
</tr>
<tr>
<td>4.0</td>
<td>3.0</td>
<td>2.0</td>
<td>1.0</td>
</tr>
</tbody>
</table>

PERSPECTIVES ON REGULATION

To what extent do you agree or disagree with the following statements?

- Good marketing data governance represents a competitive advantage for its practitioners.
- I fear that increased regulation of the use of marketing data in my market will negatively affect my business.
- Practicing data-driven marketing is easier in my market than in others.
- Regulations for marketing data use should be standardized across markets.

Note: Refer to page 23 of the 2015 Global Review for global averages.
**What do practitioners need to derive greater value from DDMA?**

**DERIVING VALUE FROM PROGRAMS**

How important would each of the following be in advancing your (or your clients’) ability to derive value from your DDMA programs?

<table>
<thead>
<tr>
<th>Issue</th>
<th>Netherlands Index</th>
<th>Global Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better understanding of DDMA and its contribution among senior stakeholders</td>
<td>3.85</td>
<td>4.12</td>
</tr>
<tr>
<td>Better integration between advertising and marketing technology platforms</td>
<td>3.77</td>
<td>4.02</td>
</tr>
<tr>
<td>Improved access to quality and audience data</td>
<td>3.87</td>
<td>3.85</td>
</tr>
<tr>
<td>Improved campaign measurement</td>
<td>4.12</td>
<td>4.10</td>
</tr>
<tr>
<td>Improved organizational processes for digital marketing</td>
<td>3.83</td>
<td>3.98</td>
</tr>
<tr>
<td>More/better staff training with respect to digital marketing programs/execution</td>
<td>3.35</td>
<td>3.66</td>
</tr>
<tr>
<td>Better integration between advertising and marketing technology platforms</td>
<td>4.02</td>
<td>4.08</td>
</tr>
<tr>
<td>More/better staff training with respect to analytics and targeting data management</td>
<td>3.81</td>
<td>4.03</td>
</tr>
<tr>
<td>Enhanced support from agency(ies) and other service providers</td>
<td>3.77</td>
<td>4.02</td>
</tr>
<tr>
<td>More/better staff training with respect to marketing and advertising technology</td>
<td>3.81</td>
<td>4.03</td>
</tr>
<tr>
<td>More/better staff training with respect to analytics and targeting data management</td>
<td>4.22</td>
<td>4.24</td>
</tr>
<tr>
<td>Improved data sharing, security and privacy</td>
<td>3.89</td>
<td>3.98</td>
</tr>
<tr>
<td>Improved campaign measurement</td>
<td>4.12</td>
<td>4.10</td>
</tr>
<tr>
<td>Enhanced support from agency(ies) and other service providers</td>
<td>3.83</td>
<td>4.09</td>
</tr>
<tr>
<td>Improved organizational processes for digital marketing</td>
<td>3.87</td>
<td>3.85</td>
</tr>
<tr>
<td>Better understanding of DDMA and its contribution among senior stakeholders</td>
<td>3.85</td>
<td>4.12</td>
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<tr>
<td>Improved access to quality and audience data</td>
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<td>4.03</td>
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<td>4.24</td>
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<td>3.98</td>
</tr>
<tr>
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<td>4.12</td>
<td>4.10</td>
</tr>
<tr>
<td>Enhanced support from agency(ies) and other service providers</td>
<td>3.83</td>
<td>4.09</td>
</tr>
</tbody>
</table>
New Zealand
New Zealand

PANEL: 28 TOTAL RESPONDENTS*

SURVEY TIMEFRAME: JULY – SEPTEMBER 2015

* Not all respondents answered every question

PRESENTING ASSOCIATION
The Marketing Association (MA) is the hub of New Zealand’s marketing industry, the heart of its marketing community and a center of excellence for all things marketing. It is the only industry body in New Zealand dedicated to ‘marketing’ with a 39 year history. MA has an established member base of over 6,000 and regularly engages with over 10,000 business and marketing professionals each year. For more information, please visit www.marketing.org.nz

PANEL COMPOSITION
How would you describe your principal role/business focus?

- MARKETER/ADVERTISER: 78.6%
- PUBLISHER/MEDIA: 0.0% (focused on selling advertising)
- PROVIDER OF MARKETING SERVICES: 14.3% (including data and agency services)
- DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY: 7.1%
- OTHER: 0.0%

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: 0.0%
- 1-5 years: 21.4%
- 6-10 years: 32.1%
- 11-15 years: 14.3%
- 16-25 years: 21.4%
- > 25 years: 10.7%

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

Displaying panelists’ “top three” responses

- Automotive: 0.0%
- Business-to-business services (“B2B”): 36.4%
- Consumer goods (“FMCG” or “CPG”): 13.6%
- Entertainment, media and/or publishing: 9.1%
- Financial services (banking, credit cards, investments, etc.): 22.7%
- Government: 9.1%
- Healthcare and/or pharmaceuticals: 4.5%
- Insurance: 4.5%
- Manufacturing: 4.5%
- Not-for-profit/charities: 0.0%
- Retail—predominately “brick-and-mortar” stores: 4.5%
- Retail—predominately catalog and/or e-commerce: 4.5%
- Technology: 13.6%
- Telecommunications: 4.5%
- Travel and hospitality: 4.5%
- Utilities: 4.5%
- Other: 22.7%
What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

DDMA PRACTICES

To what extent does your organization practice each of the following today?

- Not at all (1)
- To some extent (3)
- Sophisticated Practitioner (5)

<table>
<thead>
<tr>
<th>Practice</th>
<th>2015 Index</th>
<th>New Zealand Index</th>
<th>Global Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Segment data so as to better target and engage addressable consumer (and/or B-to-B audiences)</td>
<td>55.6%</td>
<td>11.1%</td>
<td>33.3%</td>
</tr>
<tr>
<td>Maintain databases to host information on customers and/or prospects</td>
<td>44.4%</td>
<td>40.7%</td>
<td>44.4%</td>
</tr>
<tr>
<td>Purchase third-party data (e.g. mailing lists, digital behavioral data, etc.) to support targeted marketing campaigns</td>
<td>40.7%</td>
<td>22.2%</td>
<td>51.9%</td>
</tr>
<tr>
<td>Measure campaign results across individual marketing channels (e.g. only in one type of campaign, such as direct mail)</td>
<td>55.6%</td>
<td>14.8%</td>
<td>33.3%</td>
</tr>
<tr>
<td>Measure campaign results across multiple marketing channels (e.g. supporting media mix allocation and customer segmentation across multiple channels, such as direct mail, email and digital advertising)</td>
<td>55.6%</td>
<td>2.4%</td>
<td>2.74%</td>
</tr>
</tbody>
</table>

Index scores were created by assigning scores of 1, 3 and 5 to the response choices, enabling the calculation of a weighted average on a 1-to-5 scale, with 1 indicating the use case is not practiced at all, and 5 indicating the use case is practiced in a sophisticated manner.

New Zealand Index

Global Index

A NOTE ABOUT INDEX SCORES

Various “index scores” will appear throughout this report, representing a weighted average of panelist response to questions geared at understanding the extent to which DDMA practitioners are emphasizing various initiatives, opportunities and tactical priorities. Where possible, country-specific index scores—as reported on a scale of 1-to-5—are provided along with their comparable “Global Index” benchmarks, as reported by the entirety of The Global Review’s 17-nation worldwide panel.

Note: Throughout this report, various references to “2014” and “2015” data are included to display and contrast responses provided to the same question asked in the 2014 and 2015 versions of The Global Review, respectively.
DDMA SOPHISTICATION

How sophisticated is your organization’s data-driven marketing and advertising (DDMA) approach?

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?
How are practitioners investing in DDMA? What returns are they generating?

SPENDING ON DDMA

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?

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Decrease(d) significantly</td>
<td>No change</td>
<td>45.5%</td>
<td>31.8%</td>
<td>Increase(d) significantly</td>
</tr>
<tr>
<td>0.0%</td>
<td>0.0%</td>
<td>45.5%</td>
<td>31.8%</td>
<td>54.6%</td>
</tr>
</tbody>
</table>

Note: Refer to page 16 of the 2015 Global Review for global averages.

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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 your (or your clients’) spending in each of the following data-driven marketing and advertising channels is likely to change over the next year?

- Spending change over past year as reported in 2014
- Spending change over past year as reported in 2015
- Anticipated 2016 spending change

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

Note: Refer to page 17 of the 2015 Global Review for global averages
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 your (or your clients’) spending on the following data-driven marketing and advertising campaign execution functions is likely to change over the next year?

- **Spending has increased/is likely to increase significantly**
- **No material change**
- **Spending has decreased/is likely to decrease significantly**

Note: Refer to page 18 of the 2015 Global Review for global averages
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?

- Performance change over past year as reported in 2014
- Performance change over past year as reported in 2015

Channel performance:
- Improved substantially
- Declined substantially
- No material change

Note: Refer to page 19 of the 2015 Global Review for global averages

* 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?

FACTORS DRIVING OR INHIBITING DDMA

To what extent are each of the following factors driving or inhibiting your (or your clients’) investment in DDMA?

New Zealand Index  Global Index
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?

![Bar chart showing the impact of regulation in New Zealand and globally in 2015.]

PERSPECTIVES ON REGULATION

To what extent do you agree or disagree with the following statements?

- **Strongly agree (5.0)**: Good marketing data governance represents a competitive advantage for its practitioners.
- **Strongly disagree (1.0)**: Regulations for marketing data use should be standardized across markets.
- **Neither agree nor disagree (3.0)**: Practicing data-driven marketing is easier in my market than in others.
- **Neither agree nor disagree (3.0)**: I fear that increased regulation of the use of marketing data in my market will negatively affect my business.
- **Additionally, 46.7% agreed that increased regulation would negatively affect their business.**

Note: Refer to page 23 of the 2015 Global Review for global averages.
What do practitioners need to derive greater value from DDMA?

DERIVING VALUE FROM PROGRAMS

How important would each of the following be in advancing your (or your clients’) ability to derive value from your DDMA programs?

Not at all important to derive value

Neutral importance

Critically important to derive value

1. Improved staff training with respect to analytics, segmentation and targeting
2. Improved access to quality audience data
3. Enhanced support from agency(ies) and other service providers
4. Better understanding of DDMA and its contribution among senior stakeholders
5. Improved campaign measurement and attribution tools
6. More/better staff training with respect to digital marketing programs and platforms
7. Better integration between advertising and marketing technology platforms
8. Better understanding of DDMA and its contribution among senior stakeholders

New Zealand Index

Global Index

© 2015 GDMA LLC and Winterberry Group LLC
Singapore
Singapore

PANEL:
22 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY – SEPTEMBER 2015

* Not all respondents answered every question

PRESENTING ASSOCIATION:
The Direct Marketing Association of Singapore (DMAS) is a non-profit trade organization established in 1983 to facilitate the development of direct marketing infrastructure, promote and protect DMAS members’ interests and share information and ideas on direct marketing. Our mission is to enhance the growth and profitability of member organizations and their adherence to high ethical standards of practice. For more information, please visit www.dmas.org

PANEL COMPOSITION
How would you describe your principal role/business focus?

- MARKETER/ADVERTISER: 40.9%
- PUBLISHER/MEDIA: 4.5% (focused on selling advertising)
- PROVIDER OF MARKETING SERVICES: 45.5% (including data and agency services)
- DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY: 4.5%
- OTHER: 4.5%

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: 4.5%
- 1-5 years: 36.4%
- 6-10 years: 9.1%
- 11-15 years: 27.3%
- 16-25 years: 13.6%
- > 25 years: 9.1%

INDUSTRY REPRESENTATION
Within which of the following vertical markets are your professional efforts most intensively concentrated?
Displaying panelists’ “top three” responses

- Automotive: 0.0%
- Business-to-business services (“B2B”): 22.2%
- Consumer goods (“FMCG” or “CPG”): 22.2%
- Entertainment, media and/or publishing: 0.0%
- Financial services (banking, credit cards, investments, etc.): 22.2%
- Government: 0.0%
- Healthcare and/or pharmaceuticals: 0.0%
- Insurance: 0.0%
- Manufacturing: 0.0%
- Not-for-profit/charities: 0.0%
- Retail—predominately “brick-and-mortar” stores: 11.1%
- Retail—predominately catalog and/or e-commerce: 22.2%
- Technology: 11.1%
- Telecommunications: 22.2%
- Travel and hospitality: 22.2%
- Utilities: 0.0%
- Other: 22.2%
What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

DDMA PRACTICES

To what extent does your organization practice each of the following today?

- Not at all (1)
- To some extent (3)
- Sophisticated Practitioner (5)

<table>
<thead>
<tr>
<th>Practice</th>
<th>Singapore Index</th>
<th>Global Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase third-party data (e.g. mailing lists, digital behavioral data, etc.) to support targeted marketing campaigns</td>
<td>57.9%</td>
<td>47.4%</td>
</tr>
<tr>
<td>Maintain databases to host information on customers and/or prospects</td>
<td>36.8%</td>
<td>57.9%</td>
</tr>
<tr>
<td>Segment data so as to better target and engage addressable consumer (and/or B-to-B) audiences</td>
<td>47.4%</td>
<td>42.1%</td>
</tr>
<tr>
<td>Measure campaign results across individual marketing channels (e.g. only in one type of campaign, such as direct mail)</td>
<td>0.0%</td>
<td>63.2%</td>
</tr>
<tr>
<td>Measure campaign results across multiple marketing channels (e.g. supporting media mix allocation and customer segmentation across multiple channels, such as direct mail, email and digital advertising)</td>
<td>63.2%</td>
<td>36.8%</td>
</tr>
</tbody>
</table>

Index scores were created by assigning scores of 1, 3 and 5 to the response choices, enabling the calculation of a weighted average on a 1-to-5 scale, with 1 indicating the use case is not practiced at all, and 5 indicating the use case is practiced in a sophisticated manner.

A NOTE ABOUT INDEX SCORES

Various “index scores” will appear throughout this report, representing a weighted average of panelist response to questions geared at understanding the extent to which DDMA practitioners are emphasizing various initiatives, opportunities and tactical priorities. Where possible, country-specific index scores—as reported on a scale of 1-to-5—are provided along with their comparable “Global Index” benchmarks, as reported by the entirety of The Global Review’s 17-nation worldwide panel.

Note: Throughout this report, various references to “2014” and “2015” data are included to display and contrast responses provided to the same question asked in the 2014 and 2015 versions of The Global Review, respectively.
DDMA SOPHISTICATION

How sophisticated is your organization’s data-driven marketing and advertising (DDMA) approach?

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?
How are practitioners investing in DDMA? What returns are they generating?

SPENDING ON DDMA

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?

1. Decrease(d) significantly
2. 5.6%
3. 5.6%
4. 27.8%
5. 22.2%
6. 33.3%
7. 44.4%
8. No change
9. 5.6%
10. Increase(d) significantly
11. 5.6%
12. 0.0%
13. Decrease(d) significantly
14. The past year
15. The coming year
17. Singapore Index (2015)

Note: Refer to page 16 of the 2015 Global Review for global averages
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 your (or your clients’) spending in each of the following data-driven marketing and advertising channels is likely to change over the next year?

- Spending change over past year as reported in 2014
- Spending change over past year as reported in 2015
- Anticipated 2016 spending change

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

Note: Refer to page 17 of the 2015 Global Review for global averages
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 your (or your clients’) spending on the following data-driven marketing and advertising campaign execution functions is likely to change over the next year?

- **Spending change over past year as reported in 2014**
- **Spending change over past year as reported in 2015**
- **Anticipated 2016 spending change**

Note: Refer to page 18 of the 2015 Global Review for global averages
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?

- Performance change over past year as reported in 2014
- Performance change over past year as reported in 2015

Note: Refer to page 19 of the 2015 Global Review for global averages
What’s driving the practice of DDMA? What’s inhibiting it?

FACTORS DRIVING OR INHIBITING DDMA

To what extent are each of the following factors driving or inhibiting your (or your clients’) investment in DDMA?

- Availability/usefulness of third-party audience data
- Desire to align with consumer media preferences
- Desire to be “customer-centric”
- General economic conditions in our market
- Availability of advertising and marketing technology
- Mandate from my company (or clients’) leadership
- Current business processes within my (or my clients’) organization
- Mandate from my company (or clients’) leadership
- Potential future regulatory guidelines (e.g., with respect to consumer privacy, data security, etc.)
- Availability of necessary talent/marketing expertise
- Prevailing regulatory guidelines (e.g., with respect to consumer privacy, data security, etc.)
- Availability of necessary talent/marketing expertise
- Confidence in having the ability to manage data privacy and security issues

Singapore Index
Global Index
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?

PERSPECTIVES ON REGULATION

To what extent do you agree or disagree with the following statements?

Note: Refer to page 23 of the 2015 Global Review for global averages
What do practitioners need to derive greater value from DDMA?

DERIVING VALUE FROM PROGRAMS

How important would each of the following be in advancing your (or your clients’) ability to derive value from your DDMA programs?

- Singapore Index
- Global Index

1. Better understanding of DDMA and its contribution among senior stakeholders
   - Singapore Index: 4.19
   - Global Index: 4.12

2. Improved campaign measurement and attribution tools
   - Singapore Index: 4.06
   - Global Index: 4.10

3. Improved access to quality audience data
   - Singapore Index: 3.94
   - Global Index: 4.24

4. Enhanced support from agency(ies) and other service providers
   - Singapore Index: 4.00
   - Global Index: 4.12

5. More/better staff training with respect to analytics, segmentation and targeting
   - Singapore Index: 4.29
   - Global Index: 4.22

6. Improved integration between advertising and technology platforms
   - Singapore Index: 4.06
   - Global Index: 4.03

7. Improved organizational processes
   - Singapore Index: 4.03
   - Global Index: 3.77

8. More/better staff training with respect to digital marketing programs/execution
   - Singapore Index: 4.22
   - Global Index: 3.94
PANEL: 40 TOTAL RESPONDENTS*
SURVEY TIMEFRAME: JULY – AUGUST 2015
* Not all respondents answered every question

PANEL COMPOSITION
How would you describe your principal role/business focus?

- MARKETER/ADVERTISER: 27.5%
- PUBLISHER/MEDIA: 10.0%
  (focused on selling advertising)
- PROVIDER OF MARKETING SERVICES: 42.5%
  (including data and agency services)
- DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY: 17.5%
- OTHER: 2.5%

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: 0.0%
- 1-5 years: 5.0%
- 6-10 years: 20.0%
- 11-15 years: 12.5%
- 16-25 years: 40.0%
- > 25 years: 22.5%

INDUSTRY REPRESENTATION
Within which of the following vertical markets are your professional efforts most intensively concentrated?
Displaying panelists’ “top three” responses

- Automotive: 9.1%
- Business-to-business services (“B2B”): 18.2%
- Consumer goods (“FMCG” or “CPG”): 18.2%
- Entertainment, media and/or publishing: 9.1%
- Financial services (banking, credit cards, investments, etc.): 27.3%
- Government: 9.1%
- Healthcare and/or pharmaceuticals: 0.0%
- Insurance: 9.1%
- Manufacturing: 0.0%
- Not-for-profit/charities: 36.4%
- Retail—predominately “brick-and-mortar” stores: 0.0%
- Retail—predominately catalog and/or e-commerce: 0.0%
- Technology: 0.0%
- Telecommunications: 18.2%
- Travel and hospitality: 0.0%
- Utilities: 0.0%
- Other: 27.3%

PRESENTING ASSOCIATION
SWEDMA
is the association of companies and organizations involved in direct or interactive marketing in Sweden. As an association, it organizes both buyers and sellers of direct marketing-related products and services. In this way, SWEDMA has a unique insight into the requirements and conditions that apply to direct marketing between businesses and between businesses and consumers. For more information, please visit www.swedma.se
What is Data-Driven Marketing and Advertising (DDMA)?
How is the practice evolving?

DDMA PRACTICES
To what extent does your organization practice each of the following today?

- Not at all (1)
- To some extent (3)
- Sophisticated Practitioner (5)

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A NOTE ABOUT INDEX SCORES
Various "index scores" will appear throughout this report, representing a weighted average of panelist response to questions geared at understanding the extent to which DDMA practitioners are emphasizing various initiatives, opportunities and tactical priorities. Where possible, country-specific index scores—as reported on a scale of 1-to-5—are provided along with their comparable "Global Index" benchmarks, as reported by the entirety of The Global Review’s 17-nation worldwide panel.
DDMA SOPHISTICATION

How sophisticated is your organization’s data-driven marketing and advertising (DDMA) approach?

<table>
<thead>
<tr>
<th>Level</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Not at all</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>sophisticated</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>8.8%</td>
<td>5.9%</td>
</tr>
<tr>
<td>3 About average</td>
<td>14.7%</td>
<td>20.0%</td>
</tr>
<tr>
<td>4</td>
<td>44.1%</td>
<td>40.0%</td>
</tr>
<tr>
<td>5 Very sophisticated</td>
<td>76.5%</td>
<td>64.7%</td>
</tr>
</tbody>
</table>

SWEDEN INDEX

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?

<table>
<thead>
<tr>
<th>Level</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Not at all confident</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>2 Somewhat confident</td>
<td>3.3%</td>
<td>5.9%</td>
</tr>
<tr>
<td>3 Extremely confident</td>
<td>23.5%</td>
<td>40.0%</td>
</tr>
<tr>
<td>4</td>
<td>26.5%</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>38.2%</td>
<td></td>
</tr>
</tbody>
</table>

SWEDEN INDEX

Global Index (2015)
How are practitioners investing in DDMA? What returns are they generating?

SPENDING ON DDMA

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?

Note: Refer to page 16 of the 2015 Global Review for global averages
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 your (or your clients’) spending in each of the following data-driven marketing and advertising channels is likely to change over the next year?

- Spending change over past year as reported in 2014
- Spending change over past year as reported in 2015
- Anticipated 2016 spending change

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

Note: Refer to page 17 of the 2015 Global Review for global averages
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 your (or your clients’) spending on the following data-driven marketing and advertising campaign execution functions is likely to change over the next year?

- **Spending change over past year as reported in 2014**
- **Spending change over past year as reported in 2015**
- **Anticipated 2016 spending change**

<table>
<thead>
<tr>
<th>Function</th>
<th>Spending has decreased/is likely to decrease significantly</th>
<th>No material change</th>
<th>Spending has increased/is likely to increase significantly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audience analytics/measurement and attribution (including Web analytics)</td>
<td>3.96, 3.63, 3.65</td>
<td>3.93, 3.64</td>
<td>4.26, 3.73</td>
</tr>
<tr>
<td>Creative and content development</td>
<td>3.93, 3.63, 3.65</td>
<td>3.92, 3.63</td>
<td>4.26, 3.73</td>
</tr>
<tr>
<td>Customer contact/call center, social media engagement</td>
<td>3.79, 3.48, 3.47</td>
<td>3.93, 3.64</td>
<td>4.26, 3.73</td>
</tr>
<tr>
<td>Data compilation, sourcing and brokerage</td>
<td>4.00, 3.70, 3.61</td>
<td>3.90, 3.61</td>
<td>4.26, 3.73</td>
</tr>
<tr>
<td>Database management (including CRM and “DMP” technology)</td>
<td>3.80, 3.61, 3.60</td>
<td>3.90, 3.61</td>
<td>4.26, 3.73</td>
</tr>
<tr>
<td>Digital campaign execution (Web and mobile)</td>
<td>4.00, 3.70, 3.61</td>
<td>3.90, 3.61</td>
<td>4.26, 3.73</td>
</tr>
<tr>
<td>Predictive analytics/modeling and segmentation</td>
<td>4.00, 3.70, 3.61</td>
<td>3.90, 3.61</td>
<td>4.26, 3.73</td>
</tr>
<tr>
<td>Traditional campaign execution (print, mailing, fulfillment, etc.)</td>
<td>3.38, 3.10, 2.93</td>
<td>3.93, 3.64</td>
<td>4.26, 3.73</td>
</tr>
</tbody>
</table>

Note: Refer to page 18 of the 2015 Global Review for global averages
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?

- Performance change over past year as reported in 2014
- Performance change over past year as reported in 2015

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

Note: Refer to page 19 of the 2015 Global Review for global averages
What’s driving the practice of DDMA? What’s inhibiting it?

FACTORS DRIVING OR INHIBITING DDMA

To what extent are each of the following factors driving or inhibiting your (or your clients’) investment in DDMA?

- Desire to be “customer-centric”
- Availability/usefulness of advertising and marketing technology
- Availability/usefulness of third-party audience data for purchase or license
- Current business processes within my (or my clients’) organization
- Desire to align with consumer media preferences
- Desire to be “customer-centric”
- General economic conditions in our market
- Mandate from my company (or clients’) leadership
- Availability of necessary talent/marketing expertise
- Potential future regulatory guidelines (e.g. with respect to consumer privacy, data security, etc.)
- Prevailing regulatory guidelines (e.g. with respect to consumer privacy, data security, etc.)
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?

PERSPECTIVES ON REGULATION

To what extent do you agree or disagree with the following statements?

Note: Refer to page 23 of the 2015 Global Review for global averages
What do practitioners need to derive greater value from DDMA?

DERIVING VALUE FROM PROGRAMS

How important would each of the following be in advancing your (or your clients’) ability to derive value from your DDMA programs?

Sweden Index   Global Index

- Better understanding of DDMA and its contribution among senior stakeholders
- Improved campaign measurement and attribution tools
- Better integration between advertising and marketing technology platforms
- Improved access to quality audience data
- More/better staff training with respect to analytics, segmentation and targeting
- Better understanding of DDMA and its contribution among senior stakeholders
- Improved organizational processes and attribution tools
- More/better staff training with respect to digital marketing programs/execution
- Enhanced support from agencies and other service providers
- Improved access to quality audience data
- More/better staff training with respect to marketing and advertising technology
- Improved access to quality audience data
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- More/better staff training with respect to marketing and advertising technology
- Improved access to quality audience data
- More/better staff training with respect to marketing and advertising technology
- Improved access to quality audience data
- More/better staff training with respect to marketing and advertising technology
United Kingdom
United Kingdom

PANEL:
135 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY – SEPTEMBER 2015

* Not all respondents answered every question

PRESENTING ASSOCIATION
DMA provides guidance and support to help its members put their customers at the heart of their one-to-one communications to give them the rich benefits of a much more relevant, welcomed and effective relationship with each individual customer. The DMA aspires to facilitate its members’ marketing evolution with the opportunities, advice, support, networks and tools to be able to reach the sensitivity and sophistication of marketing to build their future prosperity along with the success of the industry as a whole. For more information, please visit: www.dma.org.uk

PANEL COMPOSITION
How would you describe your principal role/business focus?

MARKETER/ADVERTISER: 37.0%
PUBLISHER/MEDIA: 3.7% (focused on selling advertising)
PROVIDER OF MARKETING SERVICES: 43.0% (including data and agency services)
DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY: 4.4%
OTHER: 11.9%

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: 3.8%
- 1-5 years: 16.2%
- 6-10 years: 21.5%
- 11-15 years: 15.4%
- 16-25 years: 27.7%
- > 25 years: 13.8%

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

Displaying panelists’ “top three” responses

- Automotive: 10.6%
- Business-to-business services (“B2B”): 40.4%
- Consumer goods (“FMCG” or “CPG”): 10.6%
- Entertainment, media and/or publishing: 4.3%
- Financial services (banking, credit cards, investments, etc.): 8.5%
- Government: 0.0%
- Healthcare and/or pharmaceuticals: 0.0%
- Insurance: 6.4%
- Manufacturing: 6.4%
- Not-for-profit/charities: 21.3%
- Retail—predominately “brick-and-mortar” stores: 4.3%
- Retail—predominately catalog and/or e-commerce: 10.6%
- Technology: 12.8%
- Telecommunications: 2.1%
- Travel and hospitality: 6.4%
- Utilities: 0.0%
- Other: 8.5%
What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

DDMA PRACTICES
To what extent does your organization practice each of the following today?

- Not at all (1)
- To some extent (3)
- Sophisticated Practitioner (5)

<table>
<thead>
<tr>
<th>Practice</th>
<th>United Kingdom</th>
<th>Global Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Segment data so as to better target and engage addressable consumer (and/or B-to-B) audiences</td>
<td>6.5%</td>
<td>56.5%</td>
</tr>
<tr>
<td>Purchase third-party data (e.g. mailing lists, digital behavioral data, etc.) to support targeted marketing campaigns</td>
<td>44.4%</td>
<td>33.3%</td>
</tr>
<tr>
<td>Maintain databases to host information on customers and/or prospects</td>
<td>22.2%</td>
<td>35.2%</td>
</tr>
<tr>
<td>Measure campaign results across individual marketing channels (e.g. only in one type of campaign, such as direct mail)</td>
<td>8.3%</td>
<td>38.9%</td>
</tr>
<tr>
<td>Measure campaign results across multiple marketing channels (e.g. supporting media mix allocation and customer segmentation across multiple channels, such as direct mail, email and digital advertising)</td>
<td>17.6%</td>
<td>36.1%</td>
</tr>
</tbody>
</table>

Index scores were created by assigning scores of 1, 3 and 5 to the response choices, enabling the calculation of a weighted average on a 1-to-5 scale, with 1 indicating the use case is not practiced at all, and 5 indicating the use case is practiced in a sophisticated manner.

A NOTE ABOUT INDEX SCORES
Various “index scores” will appear throughout this report, representing a weighted average of panelist response to questions geared at understanding the extent to which DDMA practitioners are emphasizing various initiatives, opportunities and tactical priorities. Where possible, country-specific index scores—as reported on a scale of 1-to-5—are provided along with their comparable “Global Index” benchmarks, as reported by the entirety of The Global Review’s 17-nation worldwide panel.

Note: Throughout this report, various references to “2014” and “2015” data are included to display and contrast responses provided to the same question asked in the 2014 and 2015 versions of The Global Review, respectively.
DDMA SOPHISTICATION
How sophisticated is your organization’s data-driven marketing and advertising (DDMA) approach?

<table>
<thead>
<tr>
<th>Level</th>
<th>United Kingdom</th>
<th>Global Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not at all sophisticated</td>
<td>2.8%</td>
<td>1.9%</td>
</tr>
<tr>
<td>About average</td>
<td>26.7%</td>
<td>23.1%</td>
</tr>
<tr>
<td>Very sophisticated</td>
<td>57.4%</td>
<td>39.0%</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?

<table>
<thead>
<tr>
<th>Level</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not at all confident</td>
<td>0.5%</td>
<td>2.8%</td>
</tr>
<tr>
<td>Somewhat confident</td>
<td>0.5%</td>
<td>1.9%</td>
</tr>
<tr>
<td>Extremely confident</td>
<td>71.4%</td>
<td>38.0%</td>
</tr>
</tbody>
</table>
How are practitioners investing in DDMA? What returns are they generating?

SPENDING ON DDMA

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?

Note: Refer to page 16 of the 2015 Global Review for global averages
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 your (or your clients’) spending in each of the following data-driven marketing and advertising channels is likely to change over the next year?

- Spending change over past year as reported in 2014
- Spending change over past year as reported in 2015
- Anticipated 2016 spending change

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

Note: Refer to page 17 of the 2015 Global Review for global averages
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 your (or your clients’) spending on the following data-driven marketing and advertising campaign execution functions is likely to change over the next year?

- Spending change over past year as reported in 2014
- Spending change over past year as reported in 2015
- Anticipated 2016 spending change

Note: Refer to page 18 of the 2015 Global Review for global averages
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?

- Performance change over past year as reported in 2014
- Performance change over past year as reported in 2015

Note: Refer to page 19 of the 2015 Global Review for global averages
What’s driving the practice of DDMA? What’s inhibiting it?

FACTORS DRIVING OR INHIBITING DDMA
To what extent are each of the following factors driving or inhibiting your (or your clients’) investment in DDMA?

- United Kingdom Index
- Global Index

Driving investment a great deal

Neither driving nor inhibiting

Inhibiting investment a great deal

1.0  2.0  3.0  4.0  5.0
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?

PERSPECTIVES ON REGULATION
To what extent do you agree or disagree with the following statements?

- Good marketing data governance represents a competitive advantage for its practitioners.
- I fear that increased regulation of the use of marketing data in my market will negatively affect my business.
- Practicing data-driven marketing is easier in my market than in others.
- Regulations for marketing data use should be standardized across markets.

Note: Refer to page 23 of the 2015 Global Review for global averages.
What do practitioners need to derive greater value from DDMA?

DERIVING VALUE FROM PROGRAMS

How important would each of the following be in advancing your (or your clients’) ability to derive value from your DDMA programs?

- Better understanding of DDMA and its contribution among senior stakeholders
- Improved campaign measurement and attribution tools
- Improved access to quality audience data
- Better integration between advertising technology platforms
- More/better staff training with respect to analytics
- Better understanding of DDMA and its contribution among senior stakeholders
- More/better staff training with respect to digital marketing programs execution
- More/better staff training with respect to analytics, segmentation and targeting
- Improved organizational processes, including incentive structures and data-sharing policies

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United States
United States

PANEL: 422 TOTAL RESPONDENTS*

SURVEY TIMEFRAME: JULY 2015

* Not all respondents answered every question

PANEL COMPOSITION

How would you describe your principal role/business focus?

- MARKETER/ADVERTISER: 58.3%
- PUBLISHER/MEDIA: 4.7% (focused on selling advertising)
- PROVIDER OF MARKETING SERVICES: 24.6% (including data and agency services)
- DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY: 5.0%
- OTHER: 7.3%

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: 2.1%
- 1-5 years: 25.3%
- 6-10 years: 24.3%
- 11-15 years: 29.8%
- 16-25 years: 17.5%
- > 25 years: 2.1%

INDUSTRY REPRESENTATION

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

Displaying panelists’ “top three” responses

Automotive: 9.0% 31.1%
Business-to-business services (“B2B”): 20.0%
Consumer goods (“FMCG” or “CPG”): 12.7%
Entertainment, media and/or publishing: 19.0%
Financial services (banking, credit cards, investments, etc.): 3.9%
Government: 10.5%
Healthcare and/or pharmaceuticals: 10.0%
Insurance: 6.8%
Manufacturing: 20.9%
Not-for-profit/charities: 13.1%
Retail—predominately “brick-and-mortar” stores: 13.4%
Retail—predominately catalog and/or e-commerce: 10.7%
Technology: 8.0%
Telecommunications: 7.5%
Travel and hospitality: 3.2%
Utilities: 7.1%
Other: 7.1%

PRESENTING ASSOCIATION

DMA is the world’s leading independent organization for data-driven marketers. DMA’s vision is for a world in which every marketer has the ability to provide their customers with exactly what they need, at precisely the right moment when they need it. For nearly a century, DMA has inspired marketing professionals in their quest to learn, grow and collaborate for the betterment of the marketing industry. DMA offers members every opportunity for success through advocacy, networking, education, insight, and business services. For more information, please visit: www.the-dma.org

© 2015 GDMA LLC and Winterberry Group LLC
**What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?**

**DDMA PRACTICES**

To what extent does your organization practice each of the following today?

- Not at all (1)
- To some extent (3)
- Sophisticated Practitioner (5)

<table>
<thead>
<tr>
<th>Practice</th>
<th>United States</th>
<th>Global Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Segment data so as to better target and engage addressable consumer</td>
<td>53.4%</td>
<td>50.5%</td>
</tr>
<tr>
<td>Maintain databases to host information on customers and/or prospects</td>
<td>38.9%</td>
<td>40.2%</td>
</tr>
<tr>
<td>Purchase third-party data (e.g. mailing lists, digital behavioral data, etc.) to support targeted marketing campaigns</td>
<td>40.9%</td>
<td>39.9%</td>
</tr>
<tr>
<td>Measure campaign results across individual marketing channels (e.g. only in one type of campaign, such as direct mail)</td>
<td>9.9%</td>
<td>14.3%</td>
</tr>
<tr>
<td>Measure campaign results across multiple marketing channels (e.g. supporting media mix allocation and customer segmentation across multiple channels, such as direct mail, email and digital advertising)</td>
<td>50.5%</td>
<td>46.9%</td>
</tr>
</tbody>
</table>

*Index scores were created by assigning scores of 1, 3 and 5 to the response choices, enabling the calculation of a weighted average on a 1-to-5 scale, with 1 indicating the use case is not practiced at all, and 5 indicating the use case is practiced in a sophisticated manner.*

*Note: Throughout this report, various references to “2014” and “2015” data are included to display and contrast responses provided to the same question asked in the 2014 and 2015 versions of The Global Review, respectively.*
DDMA SOPHISTICATION

How sophisticated is your organization’s data-driven marketing and advertising (DDMA) approach?

<table>
<thead>
<tr>
<th>Not at all sophisticated</th>
<th>About average</th>
<th>Very sophisticated</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.4%</td>
<td>17.2%</td>
<td>50.7%</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?

<table>
<thead>
<tr>
<th>Not at all confident</th>
<th>Somewhat confident</th>
<th>Extremely confident</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.4%</td>
<td>1.8%</td>
<td>80.3%</td>
</tr>
<tr>
<td>5.9%</td>
<td>3.9%</td>
<td>5.2%</td>
</tr>
</tbody>
</table>
How are practitioners investing in DDMA? What returns are they generating?

SPENDING ON DDMA

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?

- **The past year**
- **The coming year**

### United States Index (2014)

<table>
<thead>
<tr>
<th>Change</th>
<th>United States Index (2014)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Decrease(d) significantly</td>
<td>3.3% 1.4%</td>
</tr>
<tr>
<td>No change</td>
<td>24.7% 30.7%</td>
</tr>
<tr>
<td>Increase(d) significantly</td>
<td>36.7% 39.1%</td>
</tr>
</tbody>
</table>

### United States Index (2015)

<table>
<thead>
<tr>
<th>Change</th>
<th>United States Index (2015)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Decrease(d) significantly</td>
<td>6.3% 8.2%</td>
</tr>
<tr>
<td>No change</td>
<td>28.6% 31.4%</td>
</tr>
<tr>
<td>Increase(d) significantly</td>
<td>30.7% 33.0%</td>
</tr>
</tbody>
</table>

Note: Refer to page 16 of the 2015 *Global Review* for global averages.
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 your (or your clients’) spending in each of the following data-driven marketing and advertising channels is likely to change over the next year?

Spending change over past year as reported in 2014  Spending change over past year as reported in 2015  Anticipated 2016 spending change

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

Note: Refer to page 17 of the 2015 Global Review for global averages
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 your (or your clients’) spending on the following data-driven marketing and advertising campaign execution functions is likely to change over the next year?

- Spending change over past year as reported in 2014
- Spending change over past year as reported in 2015
- Anticipated 2016 spending change

Note: Refer to page 18 of the 2015 Global Review for global averages
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?

- Performance change over past year as reported in 2014
- Performance change over past year as reported in 2015

<table>
<thead>
<tr>
<th>Channel</th>
<th>Performance change over past year as reported in 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Addressable TV</td>
<td>3.26</td>
</tr>
<tr>
<td>Digital display advertising*</td>
<td>3.25</td>
</tr>
<tr>
<td>Digital out-of-home</td>
<td>3.23</td>
</tr>
<tr>
<td>Direct mail</td>
<td>3.17</td>
</tr>
<tr>
<td>Email</td>
<td>3.39</td>
</tr>
<tr>
<td>Mobile apps, content, SMS</td>
<td>3.33</td>
</tr>
<tr>
<td>Search (SEO/SEM)</td>
<td>3.71</td>
</tr>
<tr>
<td>Social media management/content</td>
<td>3.67</td>
</tr>
<tr>
<td>Teleservices/contact centers</td>
<td>3.17</td>
</tr>
<tr>
<td>Web content (site/content optimization)</td>
<td>3.25</td>
</tr>
</tbody>
</table>

Note: Refer to page 19 of the 2015 Global Review for global averages.

* 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?

FACTORS DRIVING OR INHIBITING DDMA

To what extent are each of the following factors driving or inhibiting your (or your clients’) investment in DDMA?

- Desire to be “customer centric”
- Desire to align with consumer media preferences
- Availability/usefulness of advertising and marketing technology
- Mandate from my company’s (clients’) leadership
- General economic conditions
- Availability/usefulness of third-party audience data
- Prevailing regulatory guidelines (e.g. with respect to consumer privacy, data security, etc.)
- Potential future regulatory guidelines (e.g. with respect to consumer privacy, data security, etc.)
- Availability of necessary marketing expertise
- Current business processes
- Mandate from my company’s (clients’) leadership
- General economic conditions
- Availability/usefulness of third-party audience data
- Prevailing regulatory guidelines (e.g. with respect to consumer privacy, data security, etc.)
- Potential future regulatory guidelines (e.g. with respect to consumer privacy, data security, etc.)
- Availability of necessary marketing expertise
- Current business processes
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?

**PERSPECTIVES ON REGULATION**

To what extent do you agree or disagree with the following statements?

- Good marketing data governance represents a competitive advantage for its practitioners.
- I fear that increased regulation of the use of marketing data in my market will negatively affect my business.
- Practicing data-driven marketing is easier in my market than in others.
- Regulations for marketing data use should be standardized across markets.

Note: Refer to page 23 of the 2015 Global Review for global averages.

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What do practitioners need to derive greater value from DDMA?

DERIVING VALUE FROM PROGRAMS

How important would each of the following be in advancing your (or your clients’) ability to derive value from your DDMA programs?

- Improved access to quality audience data
- Improved campaign measurement and attribution tools
- Improved access to quality audience data
- Better migration between advertising and marketing technology platforms
- Better understanding of DDMA and its contribution among senior stakeholders
- Enhanced support from agency(ies) and other service providers
- More/better staff training with respect to digital marketing programs/execution
- More/better staff training with respect to analytics, segmentation and targeting
- More/better staff training with respect to marketing and advertising technology
- Improved organizational processes (including incentive structures and data-sharing policies)
**GDMA** 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, GDMA provides access to the world’s largest network of data-driven marketing organisations and influencers.

FOR MORE INFORMATION, PLEASE VISIT WWW.GLOBALDMA.COM

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**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 AND DATA TRANSFORMATION:** 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 and respond to growing market demands for responsiveness driven by the power of data, digital media and marketing technology.

**TRANSACTIONAL DILIGENCE:** 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.

FOR MORE INFORMATION, PLEASE VISIT WWW.WINTERBERRYGROUP.COM
**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 17 global locations across five continents. Key clients include every major agency holding company, operating agency, and top brands across verticals.

FOR MORE INFORMATION, PLEASE VISIT WWW.MEDIAMATH.COM