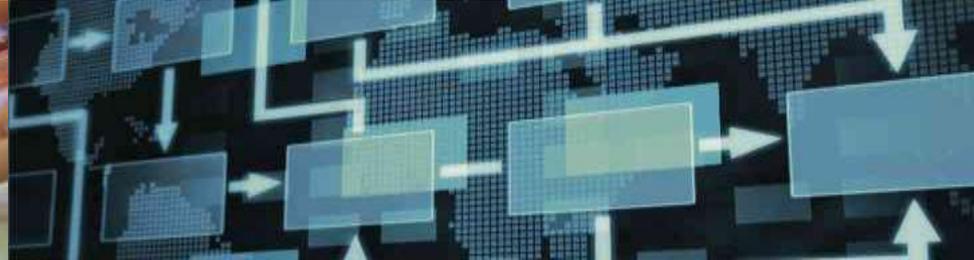


# 2015 Annual Outlook: What to expect in Data Driven Marketing & Advertising



# Introducing Presenters



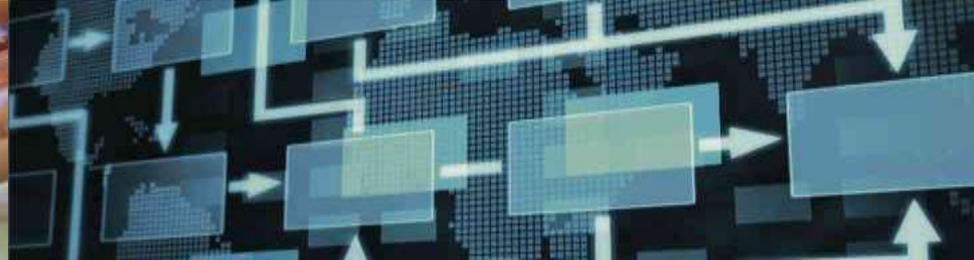
**Shelly Singh**  
Director & COO  
DMAi



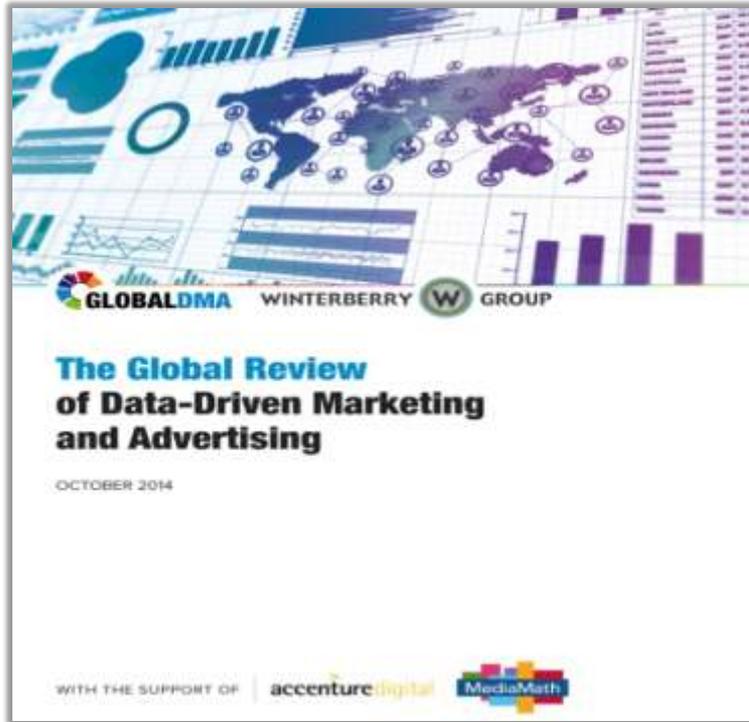
**Vatsal Asher**  
Director & CEO  
DMAi

# *-The Global Review of Data-Driven Marketing and Advertising: A Briefing -Outlook 2015*

WINTERBERRY  GROUP



# Thanks to All Those Who Supported This Effort



accenture digital



ADMA  
Association for data-driven marketing & advertising

bdma  
Belgian Direct Marketing Association



DIMSZ  
Direkt és Interaktív  
Marketing Szövetség

DMAi  
marketing made smarter



DMA  
ITALIA  
Associazione per Direct and  
Data Driven Marketing



ma.  
Marketing Association

DMAS  
DIRECT MARKETING ASSOCIATION  
OF SINGAPORE



SWEDMA

DMA

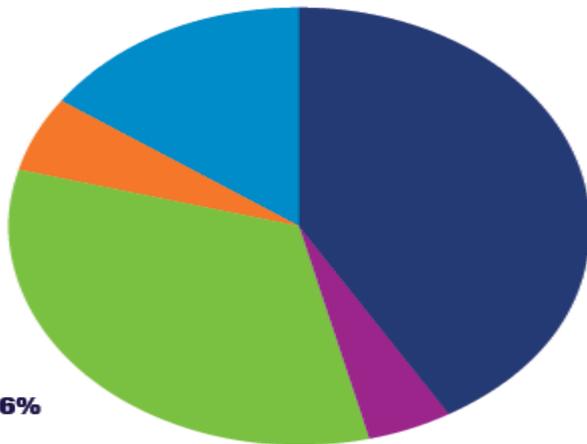
Advancing and Protecting  
Responsible Data-Driven Marketing



# Our Panel Included Over 3,000 Senior Marketing and Advertising Stakeholders

## PANEL COMPOSITION

How would you describe your principal role/business focus?



N = 3,053 Panelists

MARKETER/ADVERTISER : **41.6%**

PUBLISHER/MEDIA : **4.6%**  
(focused on selling advertising)

PROVIDER OF MARKETING SERVICES : **33.1%**  
(Including data and agency services)

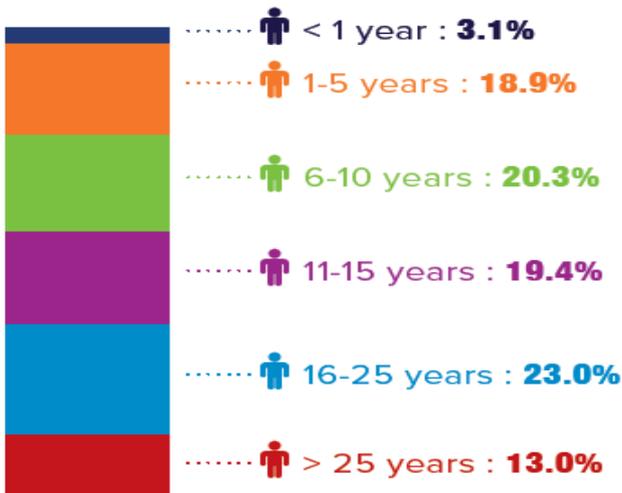
DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY : **5.5%**

OTHER : **15.3%**

## EXPERIENCE

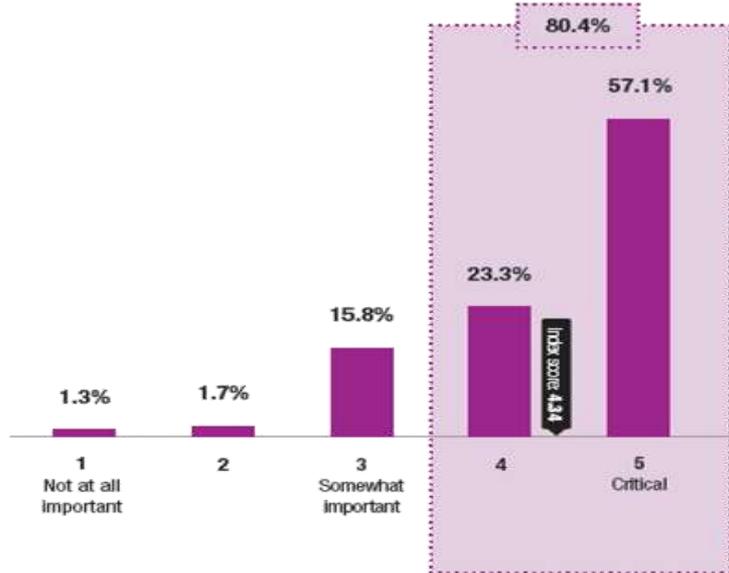
How many years of experience do you have with marketing and/or advertising?

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

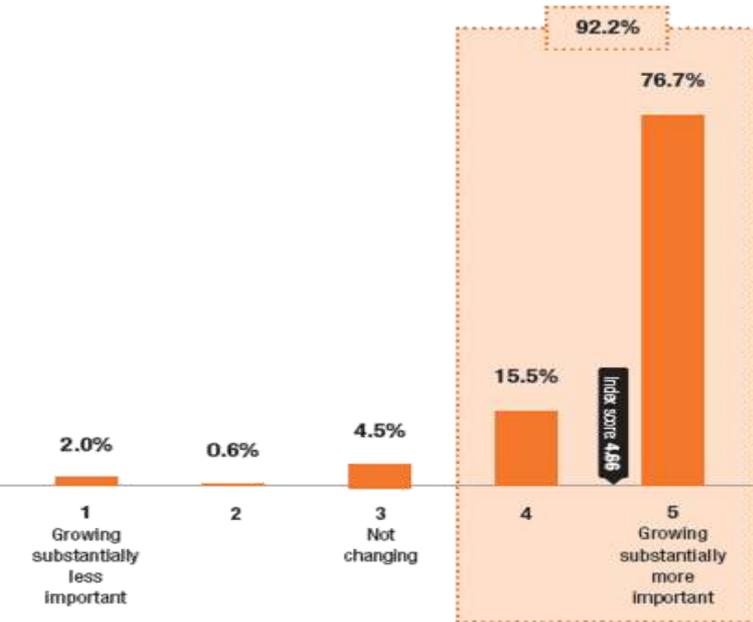


# Data Matters: 92% Say It's Growing More Important to Marketing and Advertising

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

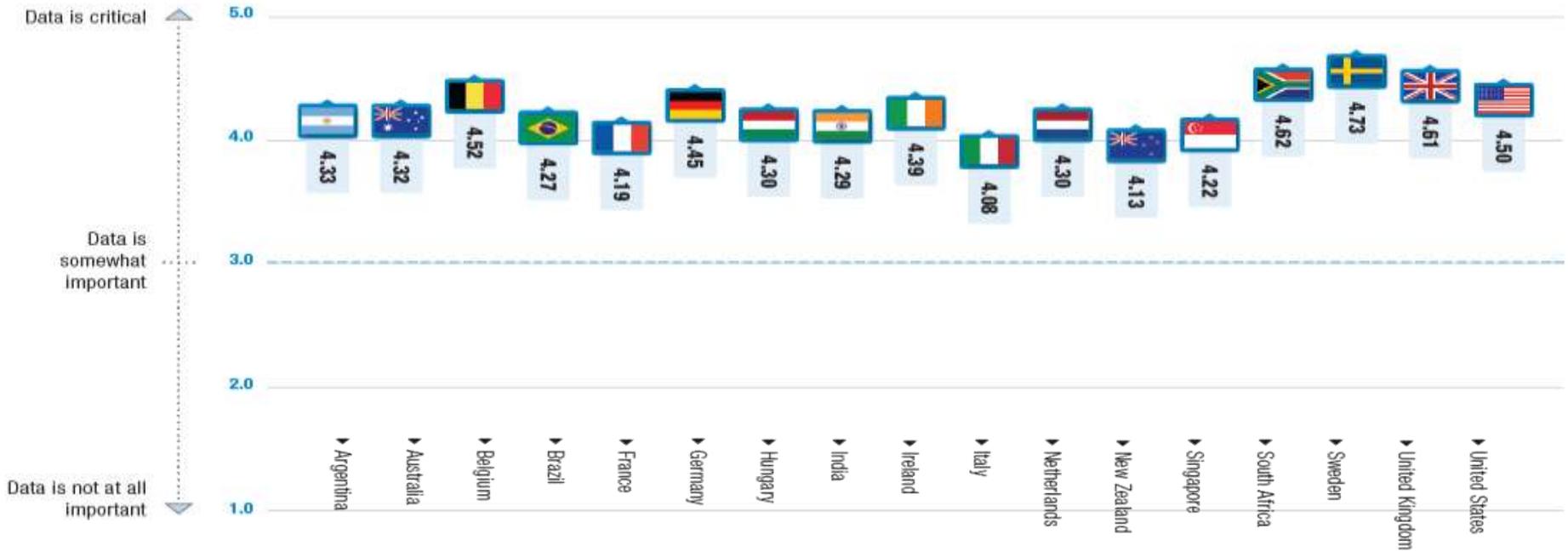


Thinking toward the future, how do you believe data's role is changing with respect to your (or your clients') marketing and advertising efforts?



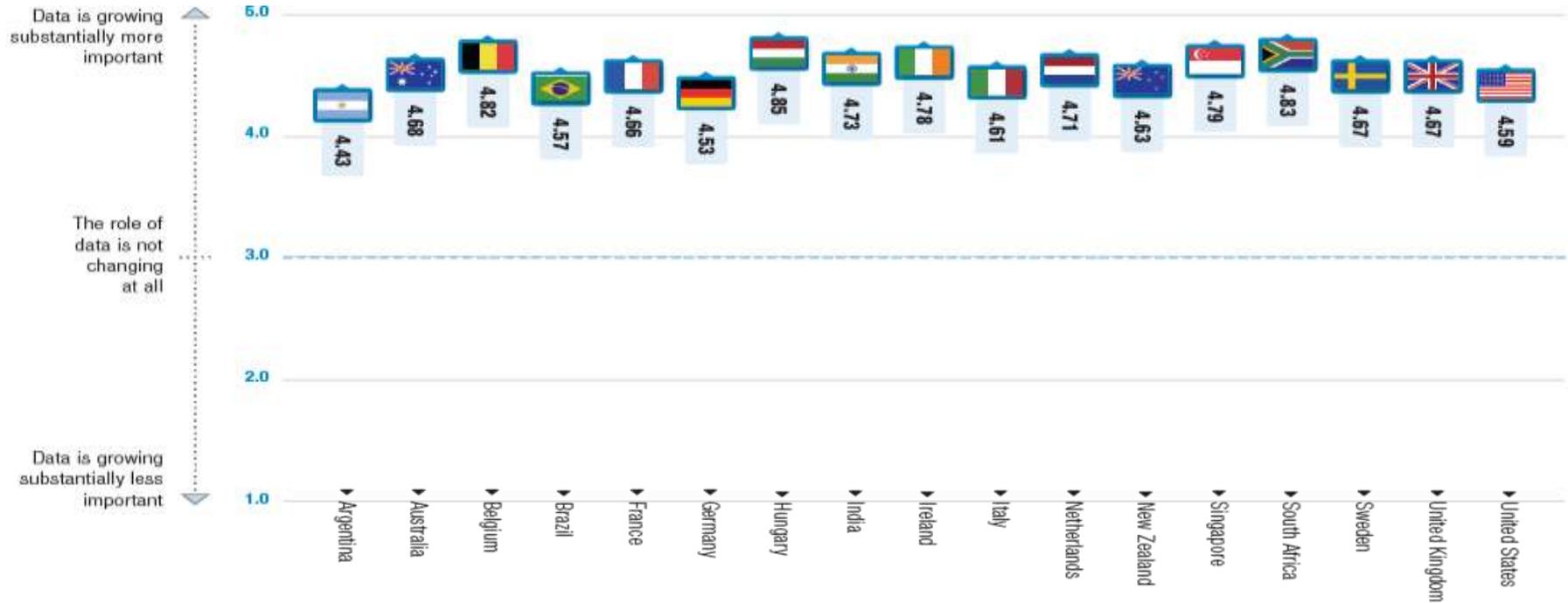
# Borders Matter Less: Embrace of “Data-Driven” Approach Consistent Worldwide...

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



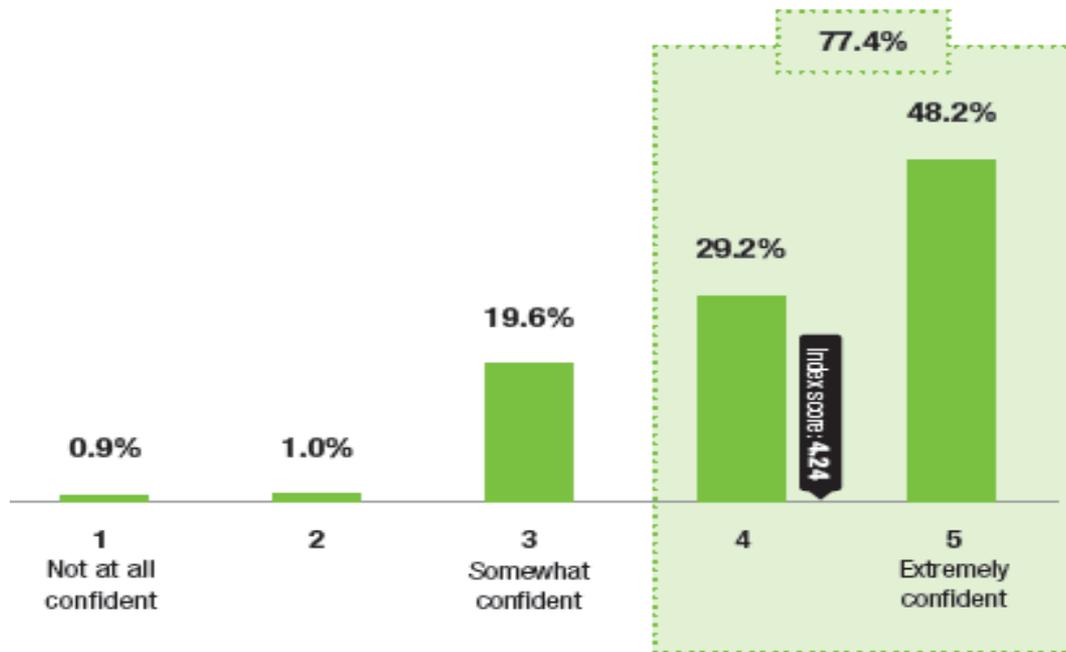
# ... And Intensifying at Similar Pace

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

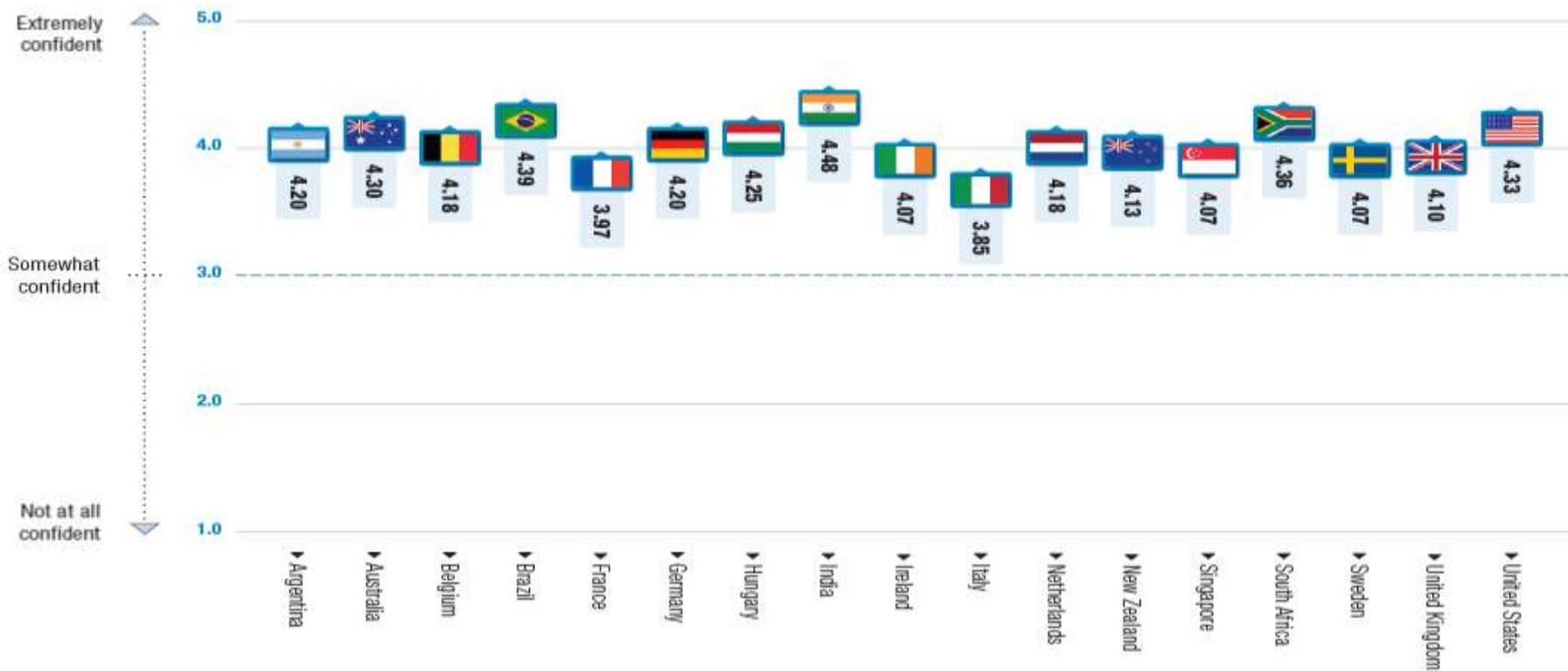


# It's a Bull Market: Three Quarters of Panel Confident in DDMA and Its Growth Prospects

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?

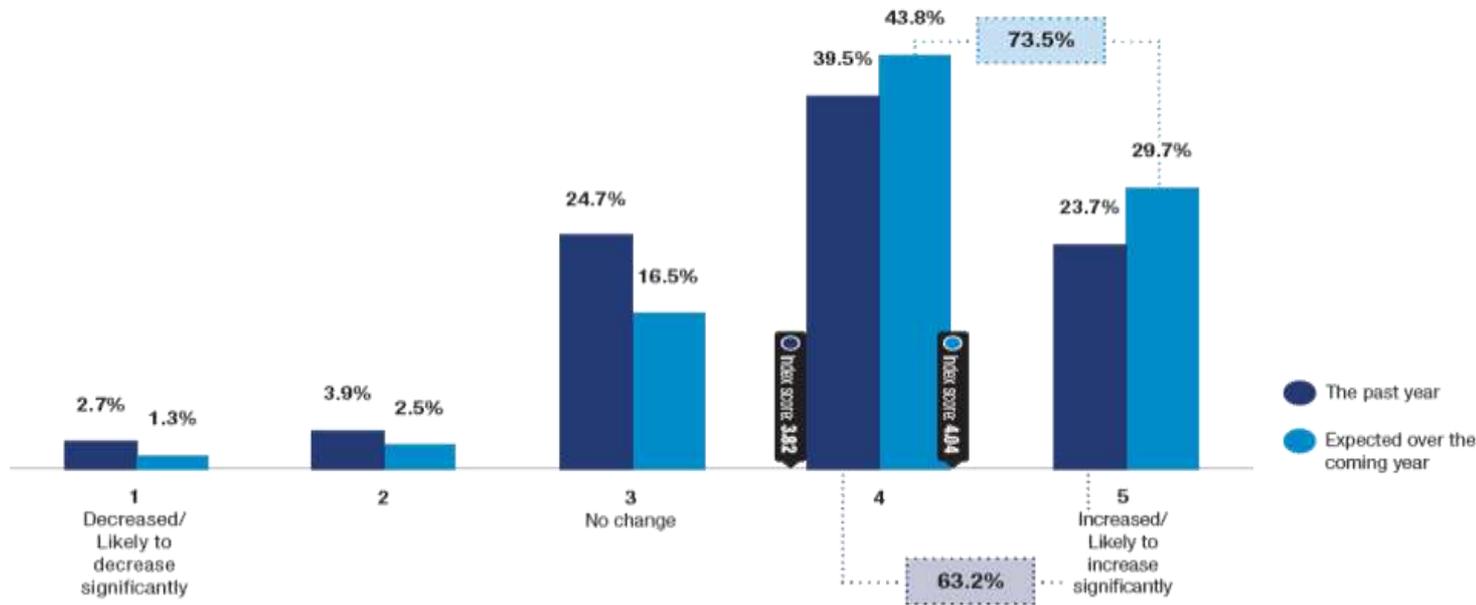


# Emerging Markets Posted Higher Levels of Aggregate Confidence, On Average



# Budgets On the Rise: 63.2% Say Spending Up Over Last Year; 73.5% Predict Further Growth

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?



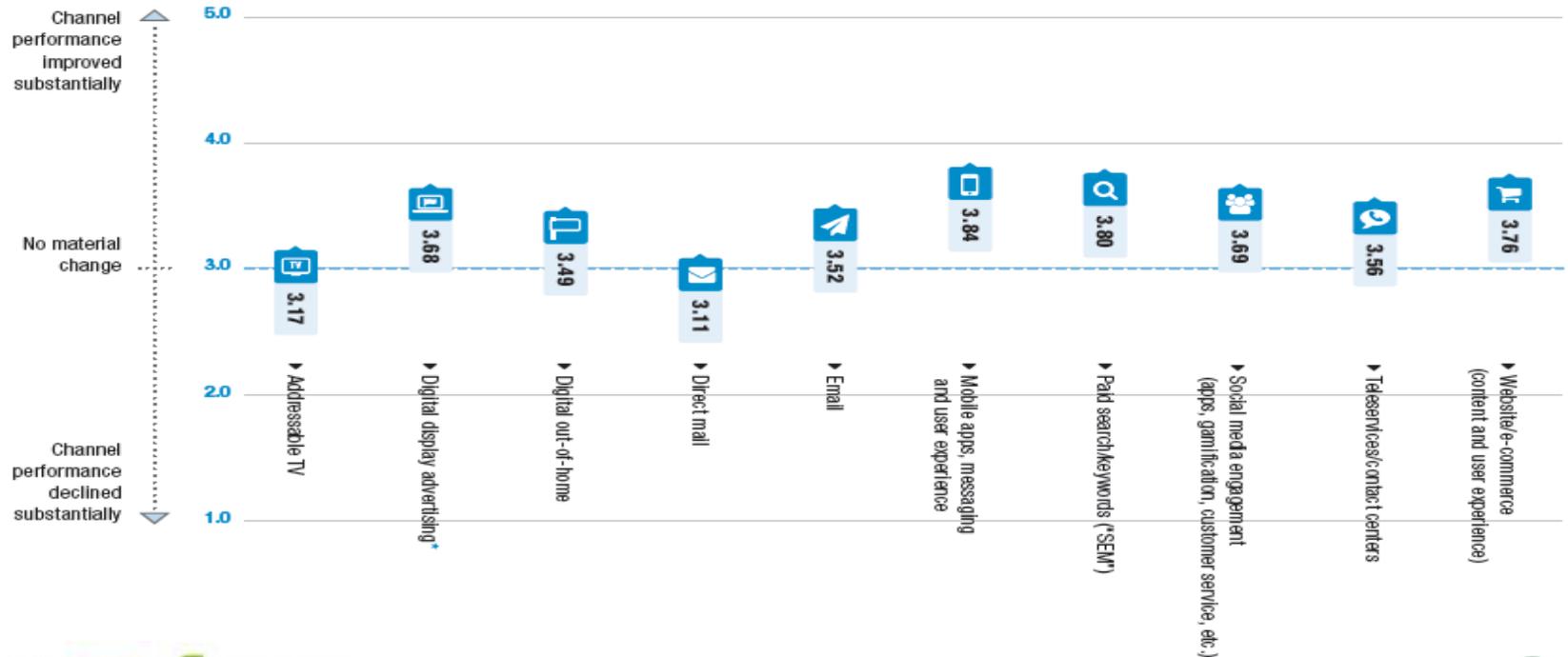
# Data is Digital. Digital is Data: Online Media Tops Among Those Capturing Share of Spend

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



# ... And Also Delivering More Substantial ROI Than “Traditional” Counterparts

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?

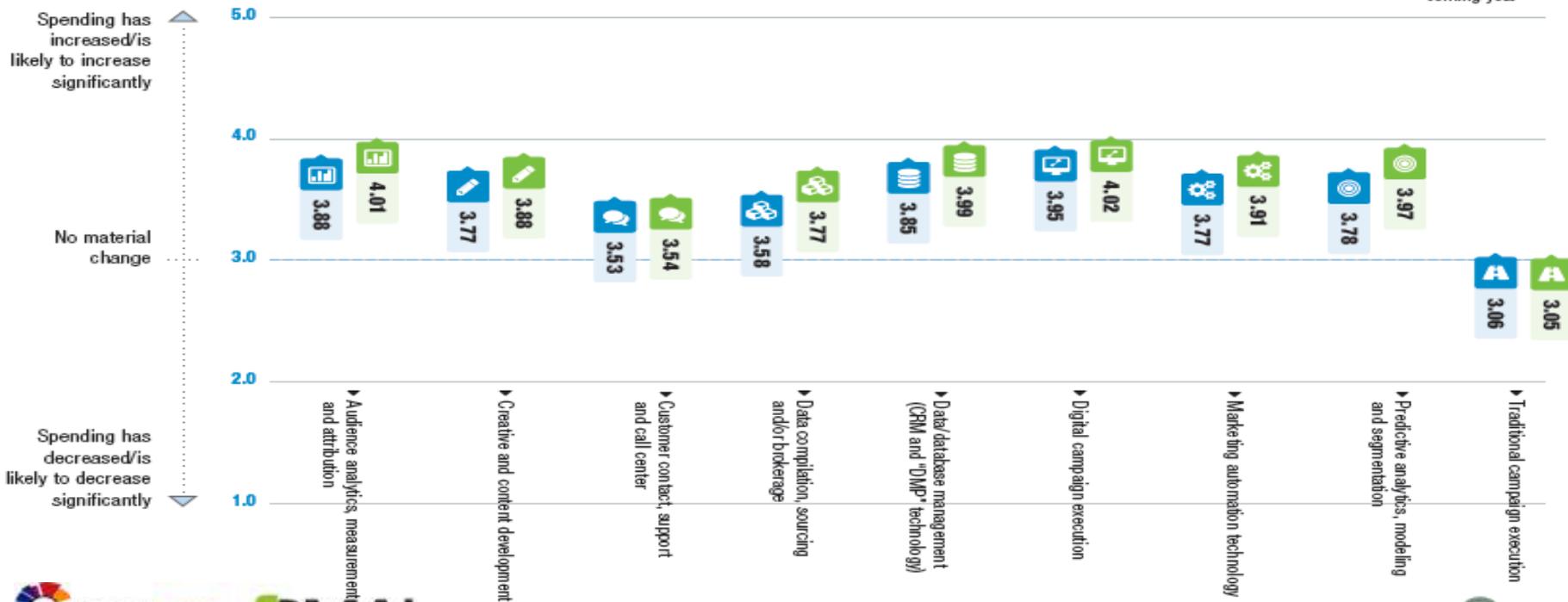


# Managing Information Requires a Focus on... Everything: DDMA Keeps Marketers Busy

How has your (or your clients') spending on each of the following data-driven marketing and advertising campaign execution functions changed over the **past year**?

How do you expect spending to change over the **next year**?

● The past year ● Expected over the coming year



# It's All About Customers: Majority Say Demand for "Customer-Centricity" Driving DDMA Effort

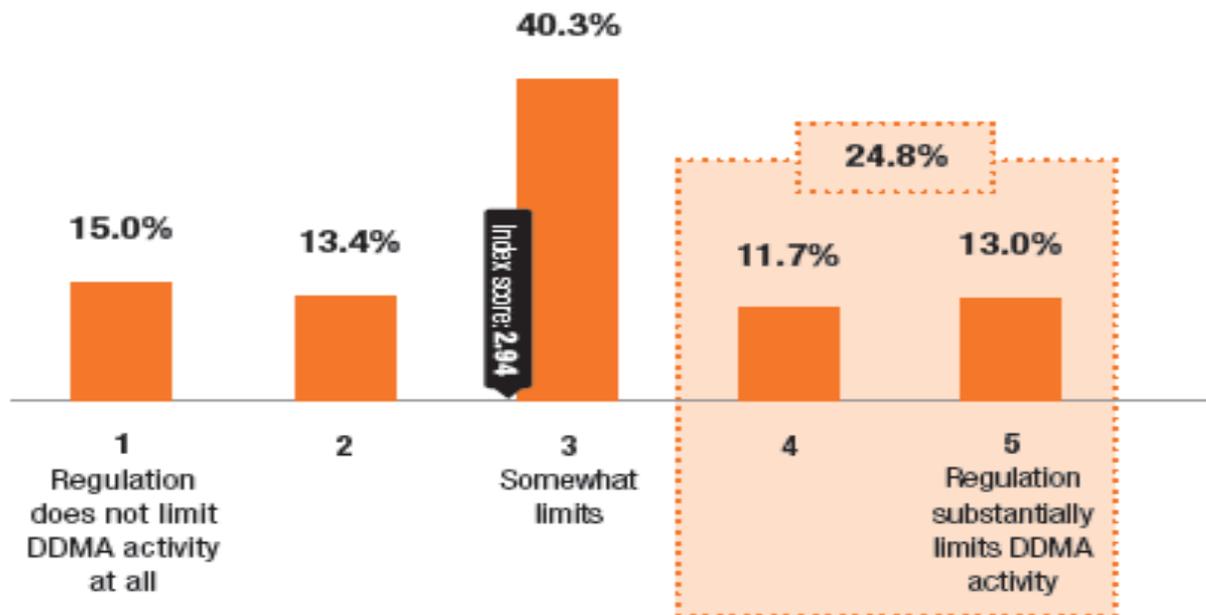
Which of the following factors, if any, are most responsible for driving your (or your clients') investment in data-driven marketing and advertising?



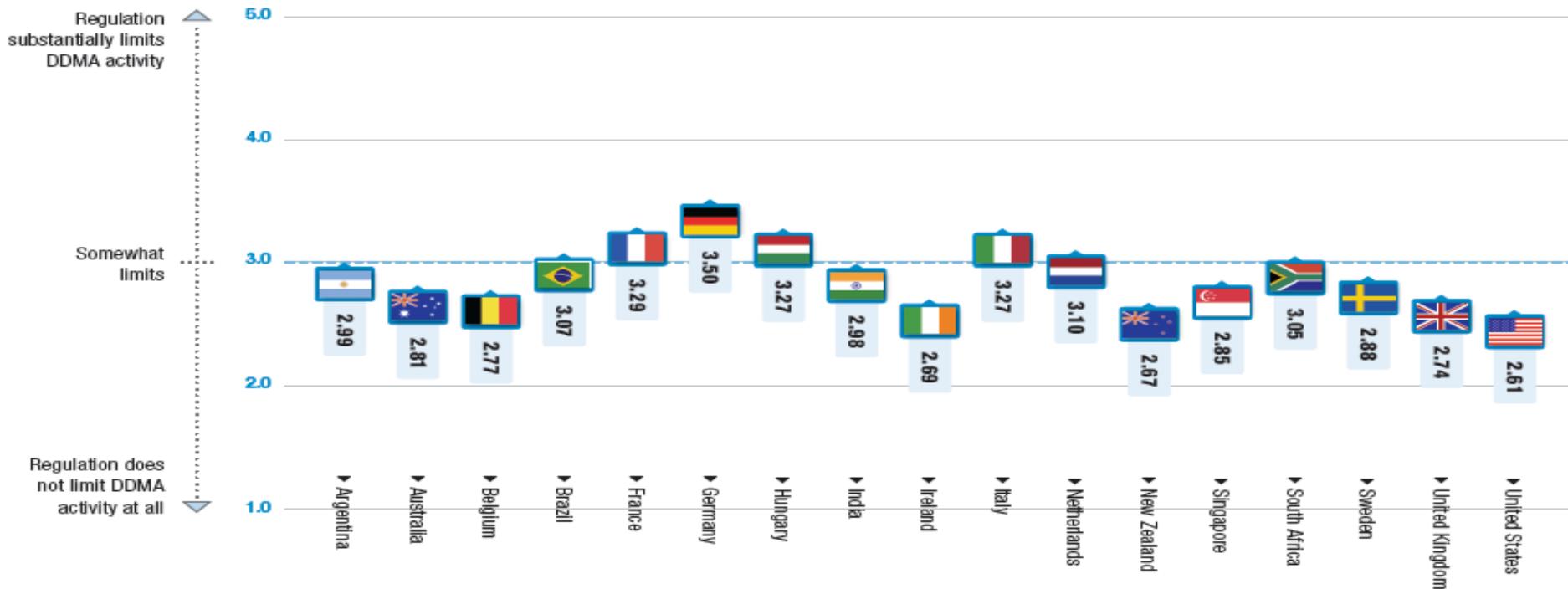
Displaying panelists' "top three" responses

# "Consumer-Friendly" is Just Good Business: Marketers Aligned with Regulatory Aims...

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?

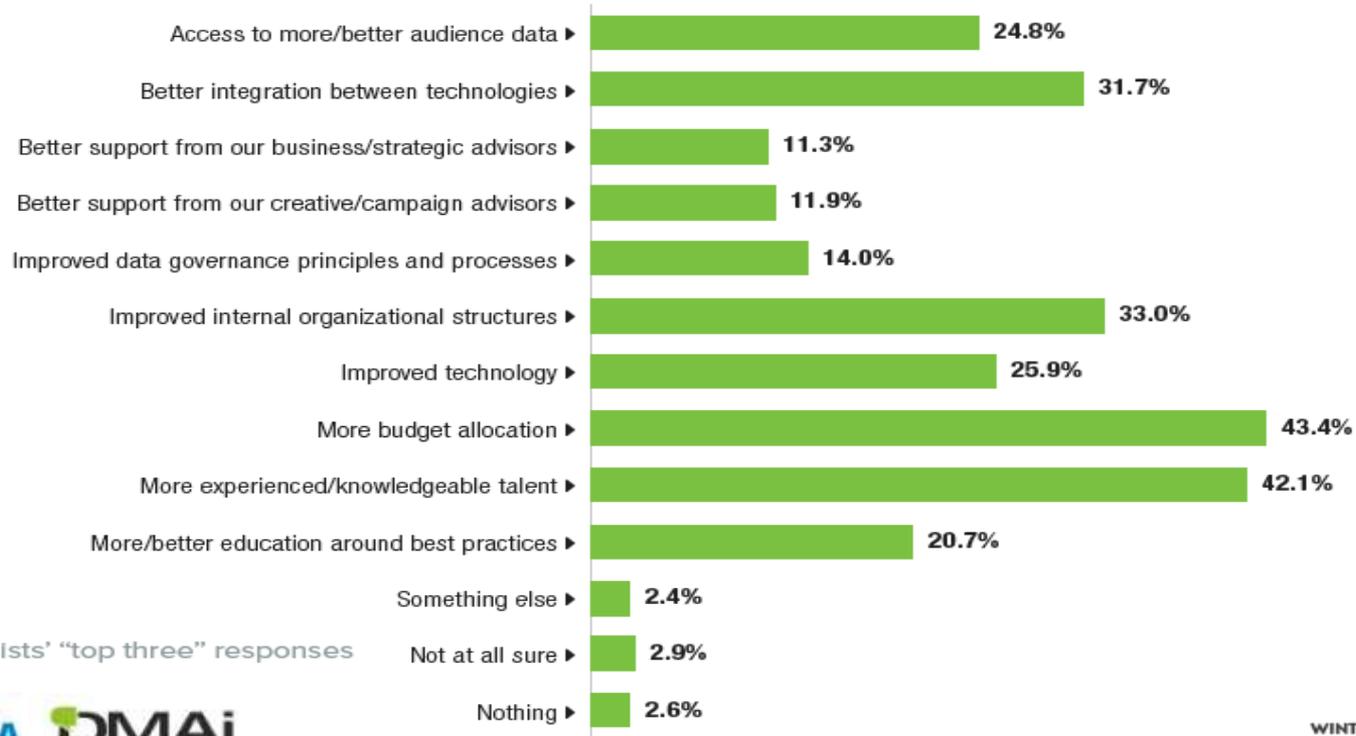


# ... Though Where It Exists, Tough Regulation Actively Limits Marketers' Ability to Innovate



# More Money, More People, More Know-How: Advancing DDMA Requires Many Resources

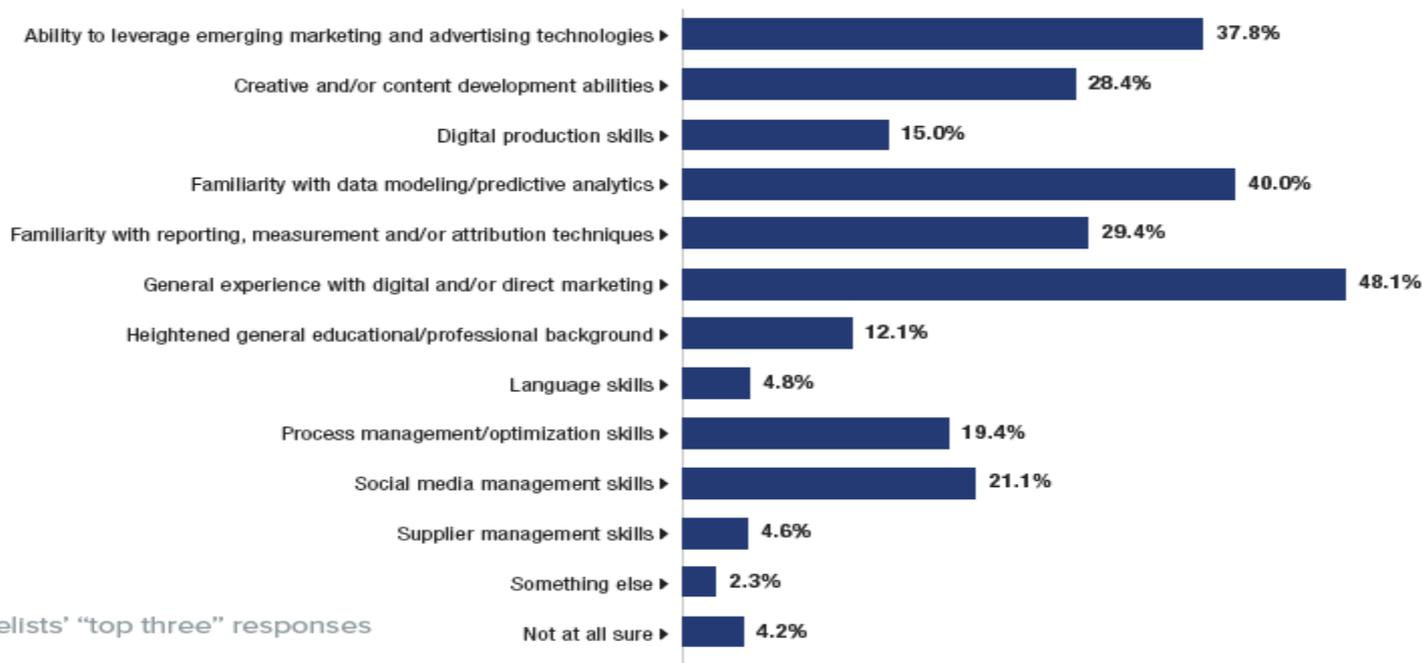
Which of the following resources would most significantly advance your (or your clients') efforts to generate value from data-driven marketing and advertising efforts?



Displaying panelists' "top three" responses

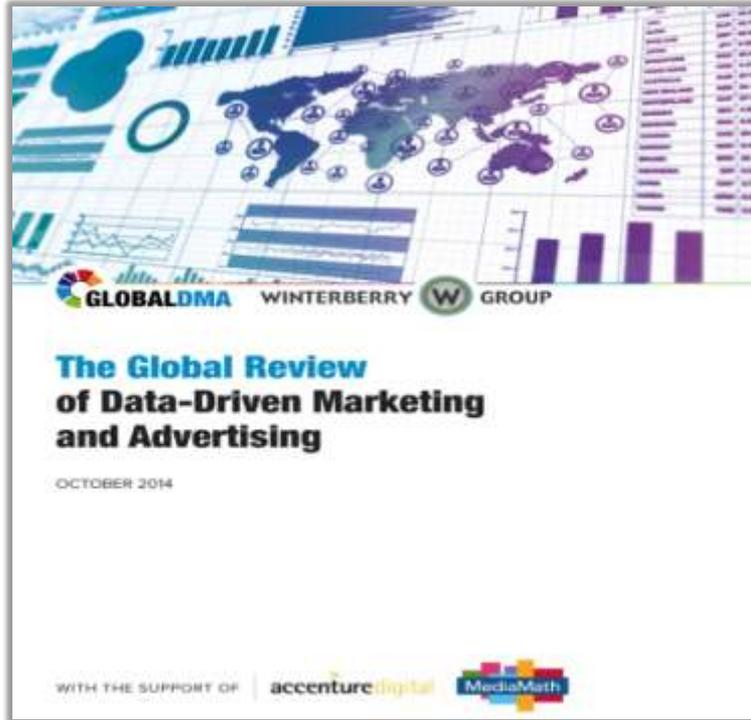
# The Centerpiece of “Data-Driven”: People Who Know the Value of *Insight*

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



Displaying panelists' “top three” responses

# "The Global Review": Available for Download



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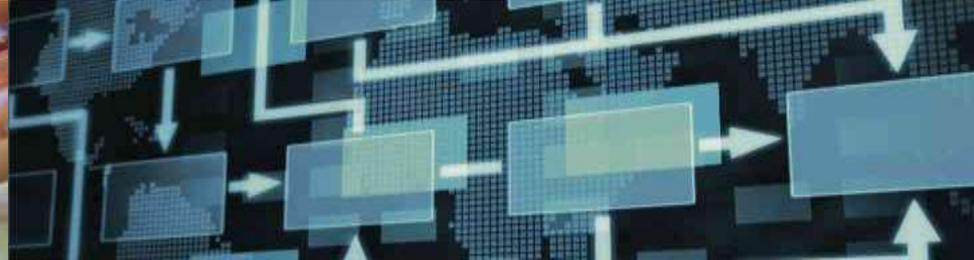
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# Outlook 2015

- Trends in Data Driven Marketing & advertising



# 2015 Trends: Is Social All That?

## What we think is TRUE

- Social sites and their apps rule
- Social is delivered more often across more mobile devices
- Social sites have tons of data (behavioral and other)
- Social IDs eat cookies—social recognition and audience extension a priority in 2015

## BUT what else?

- Transaction data is more predictive, so social commerce is an imperative
- Social effectiveness is...still to be proven (attribution required across the journey)

**2015 is the year that this gets sorted out**

# 2015 Trends: It's About The Beacons

## It's here now

- It's about in-store, location and recognition to drive engagement/activation
- It's about behavioral data collection; not just targeting
- It's about leveraging data later, or “post beaconing”
- 2014 tests lead to 2015 adoption: retail, finance, OOH

## However

- It's still early; roll-outs to accelerate; consumer adoption (opt-in, new use cases, more retargeting) to grow significantly
- It will be about direct sales/marketing before branding

**will it take share from promo spend or is it taking new money?**

# 2015 Trends: Programmatic & Addressable TV

## It's all that

- Set-top-box (STB) plus connected TV (apps) data integrated with offline and online/behavioral data for deeper consumer insights
- Consistent messaging (offer management and targeting) across platforms
- Audience buying—but not RTB—use cases take hold

## But, it's not scalable yet

- Buying processes still being sorted out; pricing still in process
- Data availability and use case development not set

## However

- Major brands in CPG, retail and finance are investing

# 2015 Trends: Big Data, the Internet of Things (IoT) and My Refrigerator is Talking to My Car!

## It's happening

- 50 billion devices—sensors, beacons and computing devices—will be connected to the Internet within 5 years<sup>1</sup>
- The “Internet of Things” is reaching a tipping point in the collection, management and deployment of data for marketing and sales uses cases

## However

- It's not just about social
- There's still no easy way to parse (what to keep and what to toss) that much data
- We're not quite there yet—but there's no lack of money or talent trying to solve the issues 😊.

# 2015 Trends: Campaign Orchestration / Execution Continues Omnichannel Expansion

## What's happened

- It's about touchpoint management (and attribution)
- Customer journey maps are integrated into the campaign platform across channels
- Data architecture and integration are critical
- Email is the preferred hub; mobile/social deployment is required
- DMPs are an extension of traditional marketing databases for enhanced data collection and audience insights

## What's next

- ESP platforms mature in 2015, offer enhanced channel support, better integration of data, easier user interface
- Verticals and segments (enterprise, mid-market and SMB) get attention

1A Strategist's Guide to the Internet of Things, Frank Burkitt, 2014

# 2015 Trends: It's the Year of Attribution and Measurement (or one of those years...)

## Today's requirements

- Accurate, data-driven, cross-environment measurement and attribution, which can solve for “bad actors” and optimize spend—justifying investment with ROI
- Tools that are fast (real-time) and easy to implement (and don't use budget already allocated)

## Questions to be sorted

- What channels should we move to? Not enough time (or money) to test them all
- How do we optimize?
- Should I do this in-house? Or out?
- What about fraud and bots and viewability (oh my!)

# 2015 Trends: Still More M&A Activity

## What's happened

- 2014 saw tremendous deal volume and value
- Ad tech and related IPOs—up then down

## What's next ?

- Big cliff of investible funds
- Demand high for companies with first-party and compiled data
- “Stacks” expand toward owning the entire audience insight, management, engagement and measurement continuum; tech companies with early adoption will be integrated
- Companies that IPO'd in 2013/2014 use their cash and stock, become buyers to drive scale
- Valuation/multiples likely to remain high in 1H15

# Questions?

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@vatsalasher

