

	USD	EUR
USA	USD 35.0	EUR 45.7
EURO	EUR 65.9	GBP 0.28
ENGLAND	JPY 0.28	SGD 22.8
JAPAN	SGD 22.8	HKD 4.47
SINGAPORE	HKD 4.47	AUD 27.6
HONG KONG	AUD 27.6	NZD 24.1
AUSTRALIA	NZD 24.1	CHF 27.1
NEW ZEALAND	CHF 27.1	SEK 4.05
SWITZERLAND	SEK 4.05	DKK 5.32
SWEDEN	DKK 5.32	CAD 0.70
DENMARK	CAD 0.70	NOK 5.40
CANADA	NOK 5.40	BRN 20.00
NORWAY	BRN 20.00	IDN 0.00
BRUNEI	IDN 0.00	CNY 0.15
INDONESIA	CNY 0.15	KRW 0.00
CHINA	KRW 0.00	TWD 0.00
KOREA	TWD 0.00	
TAIWAN		



WINTERBERRY  GROUP

The Global Review of Data-Driven Marketing and Advertising 2015

APPENDIX: MARKETPLACE SNAPSHOTS

WITH THE SUPPORT OF



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Argentina





Argentina

PANEL:
158 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY – SEPTEMBER 2015

* Not all respondents answered every question

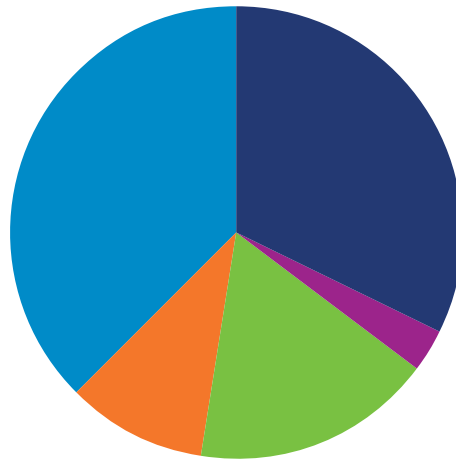
PRESENTING ASSOCIATION

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?

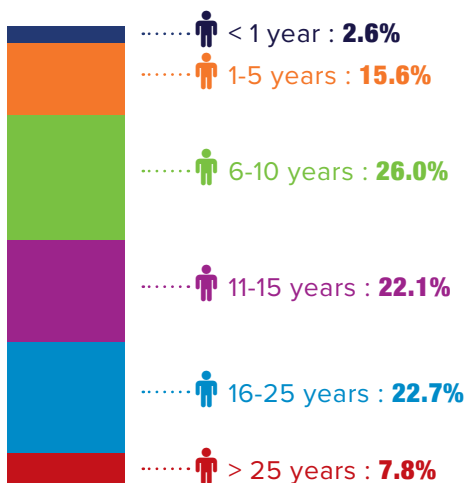


- **MARKETER/ADVERTISER : 32.3%**
- **PUBLISHER/MEDIA : 3.2%**
(focused on selling advertising)
- **PROVIDER OF MARKETING SERVICES : 17.1%**
(including data and agency services)
- **DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY : 10.1%**
- **OTHER : 37.3%**

EXPERIENCE

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

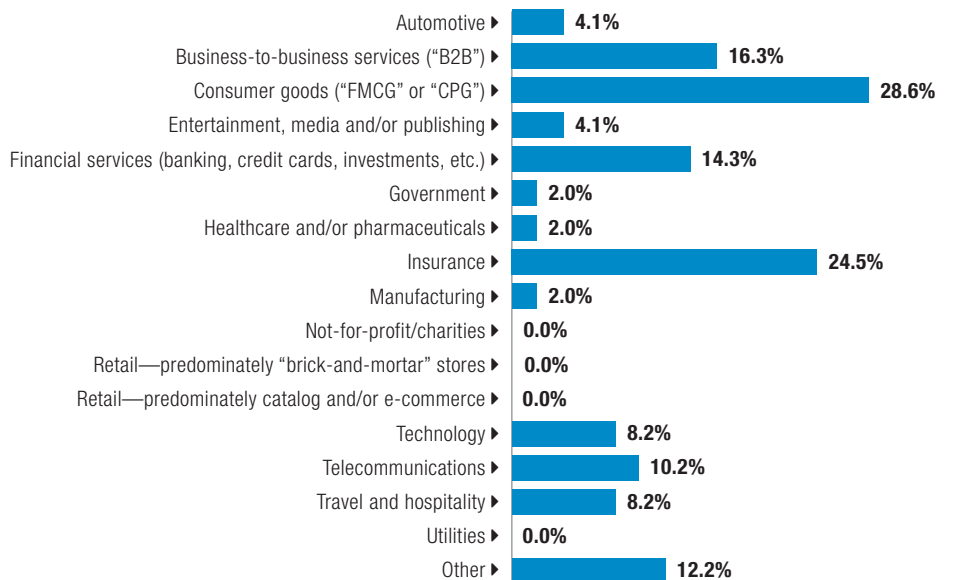
Please consider your current job and past professional roles that may apply.



INDUSTRY REPRESENTATION

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

Displaying panelists' "top three" responses

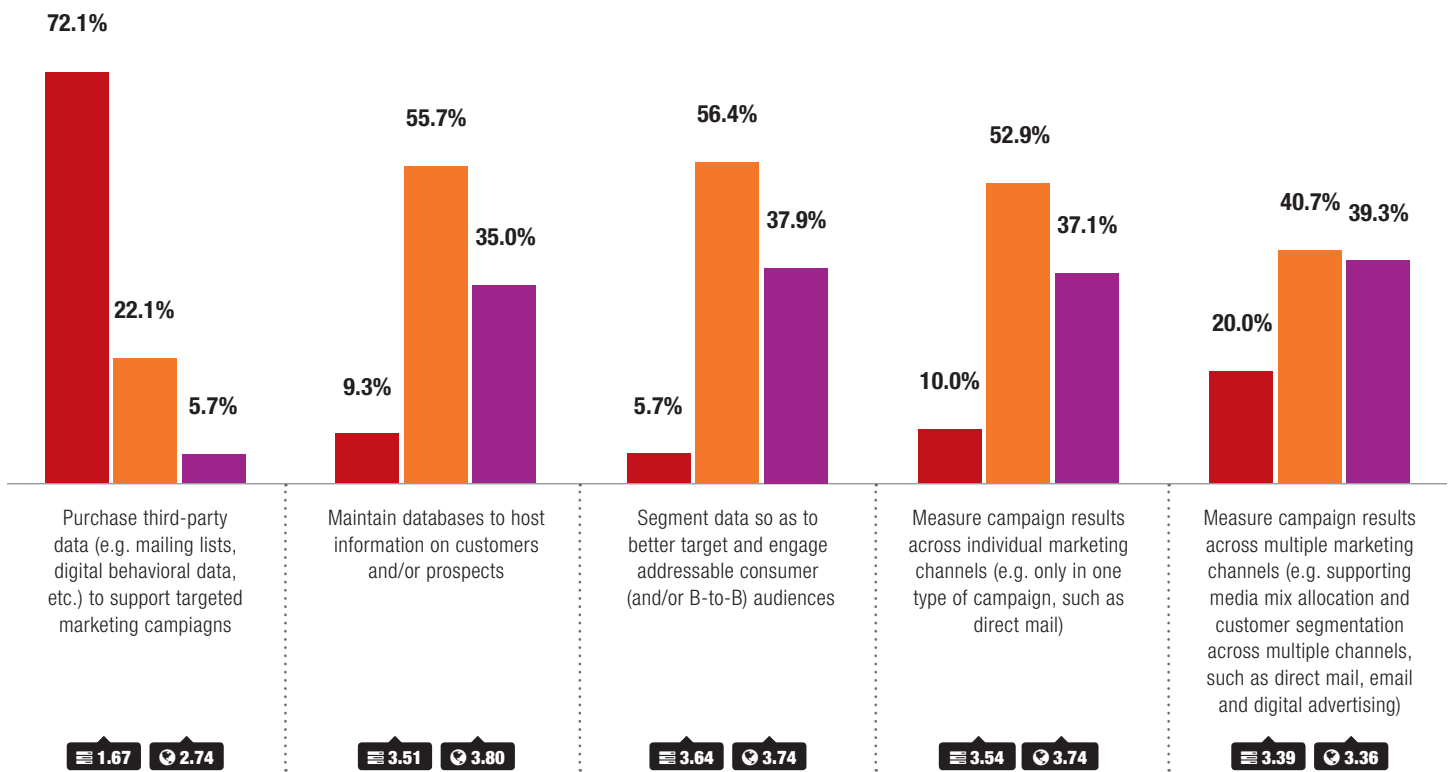


What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

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

Argentina Index

Global Index

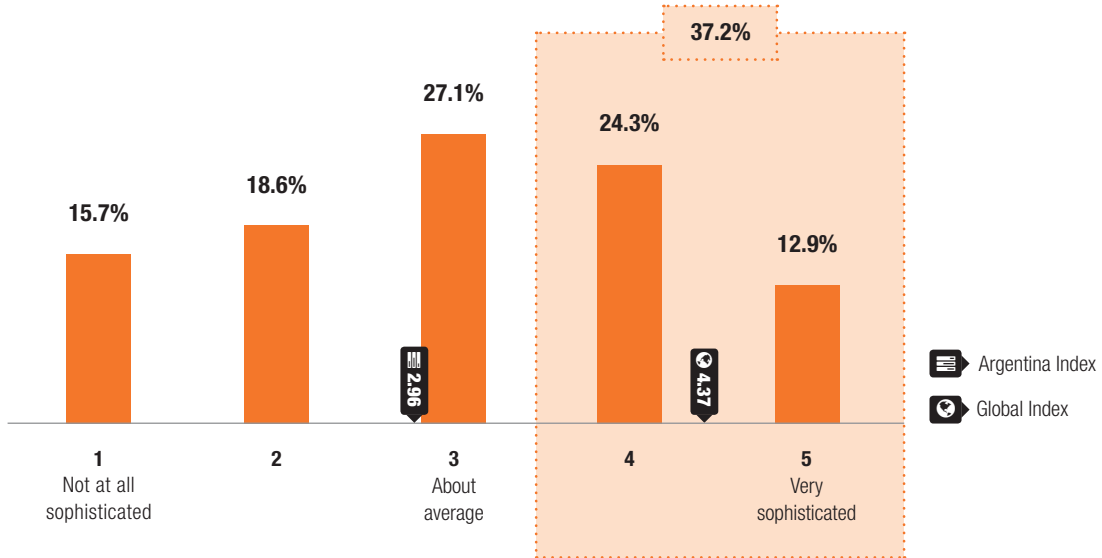
A NOTE ABOUT INDEX SCORES

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

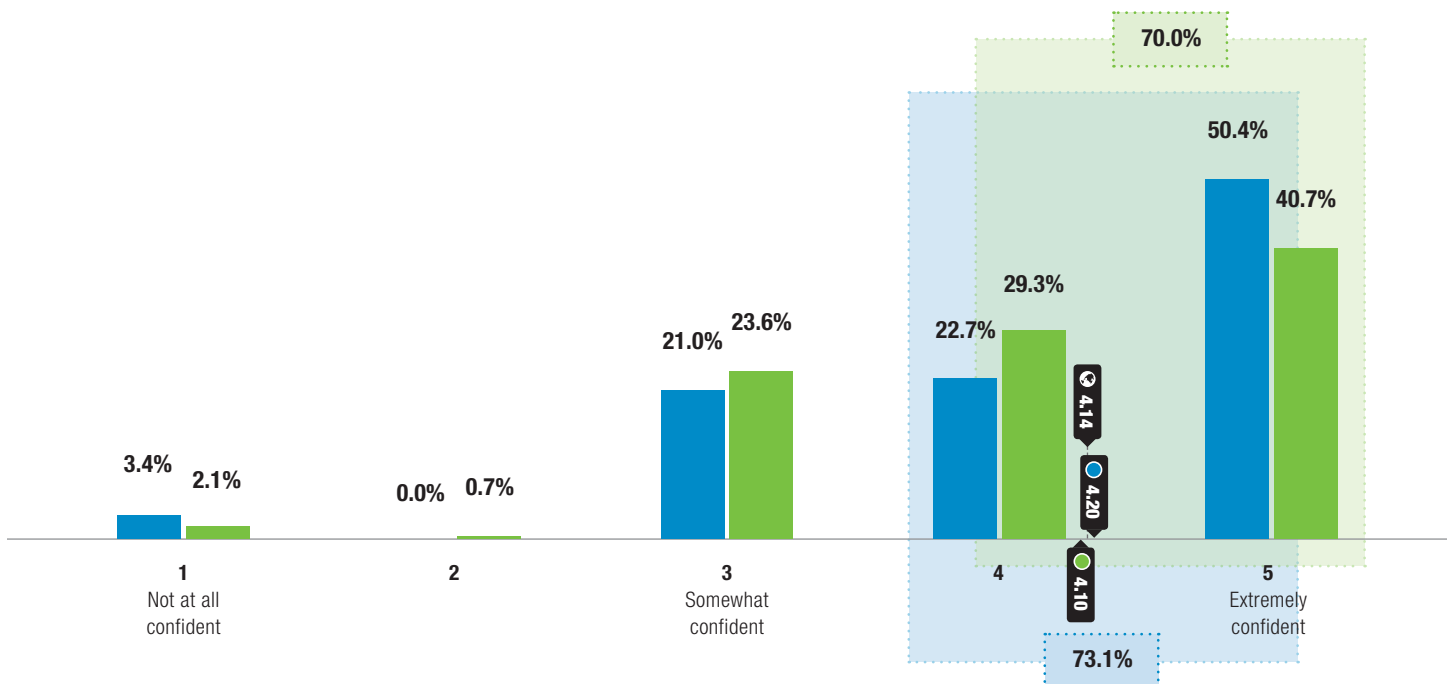
How sophisticated is your organization's data-driven marketing and advertising (DDMA) approach?



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?

● 2014 ● 2015 ■ Argentina Index 🌐 Global Index (2015)

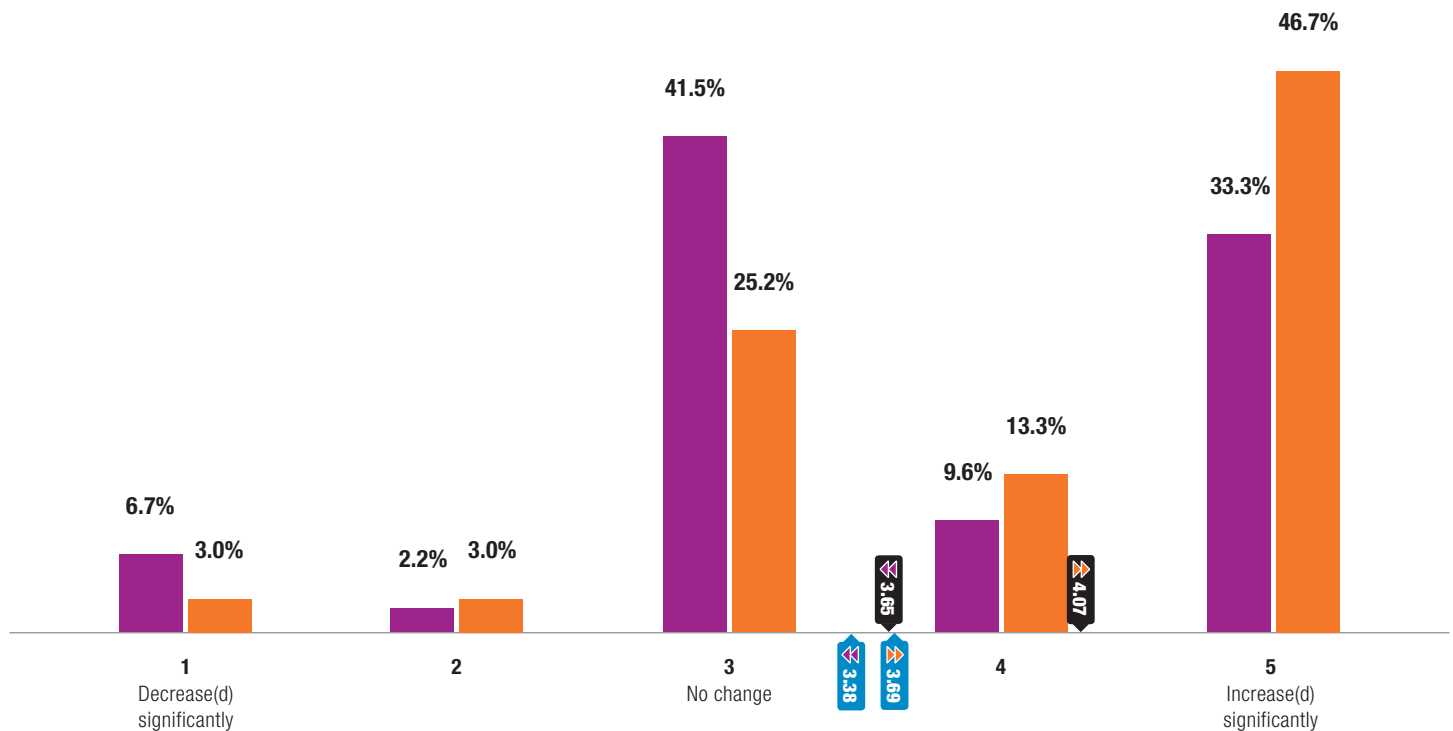


How are practitioners investing in DDMA? What returns are they generating?

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?

◀ The past year
 ▶ The coming year
 ▶ Argentina Index (2014)
 ▶ Argentina Index (2015)

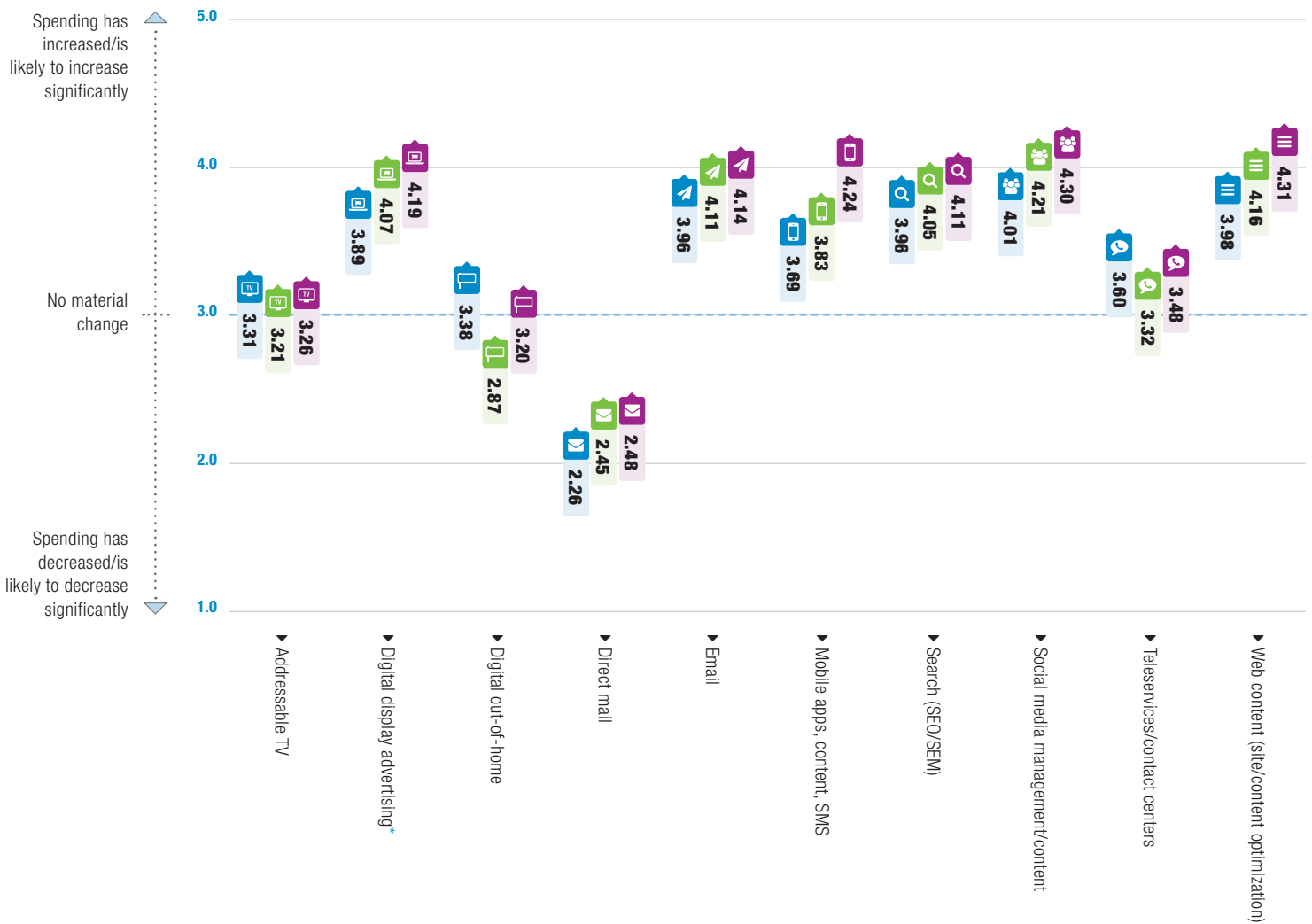


Note: Refer to page 16 of the 2015 *Global Review* for global averages

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



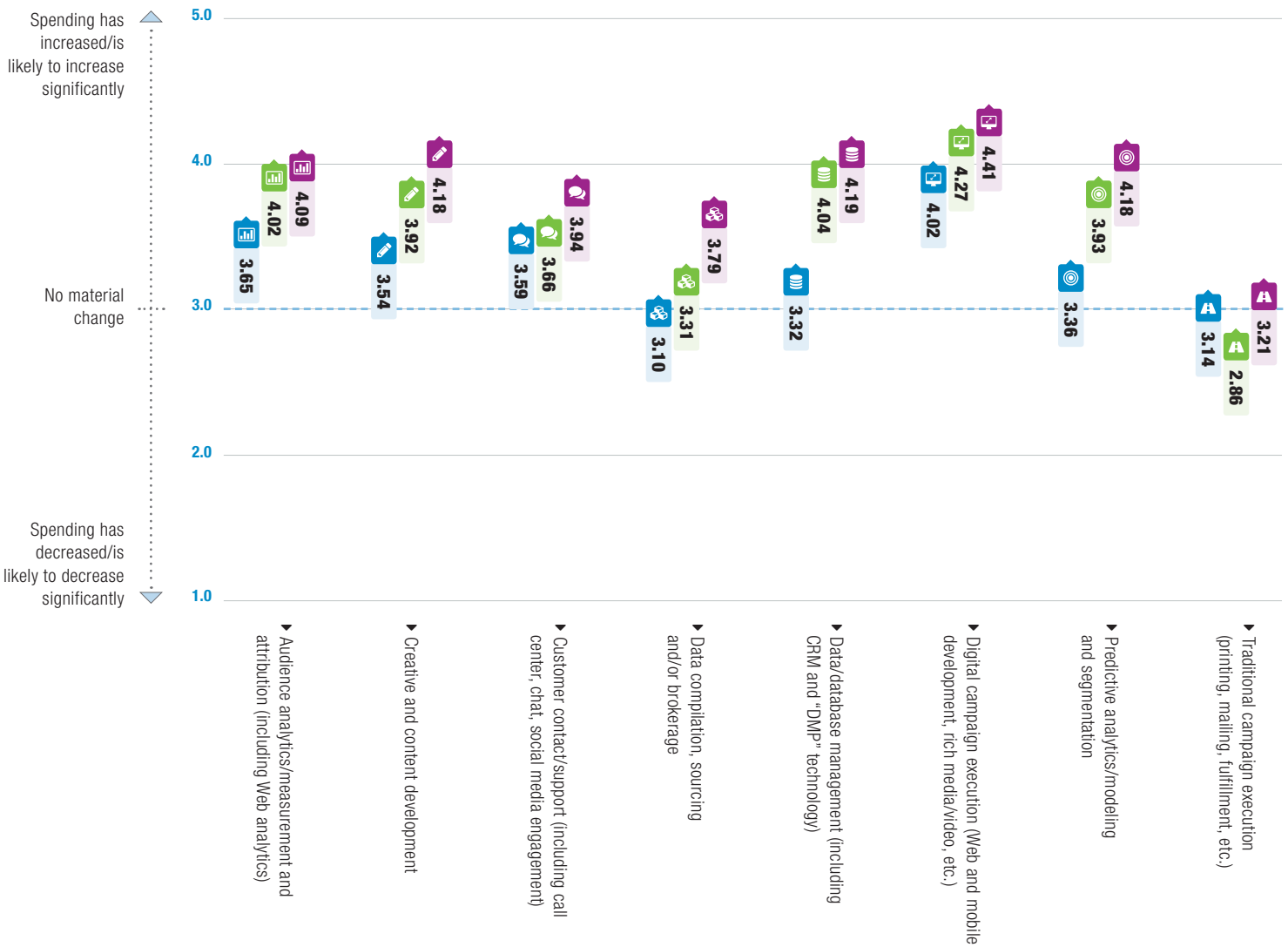
*Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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

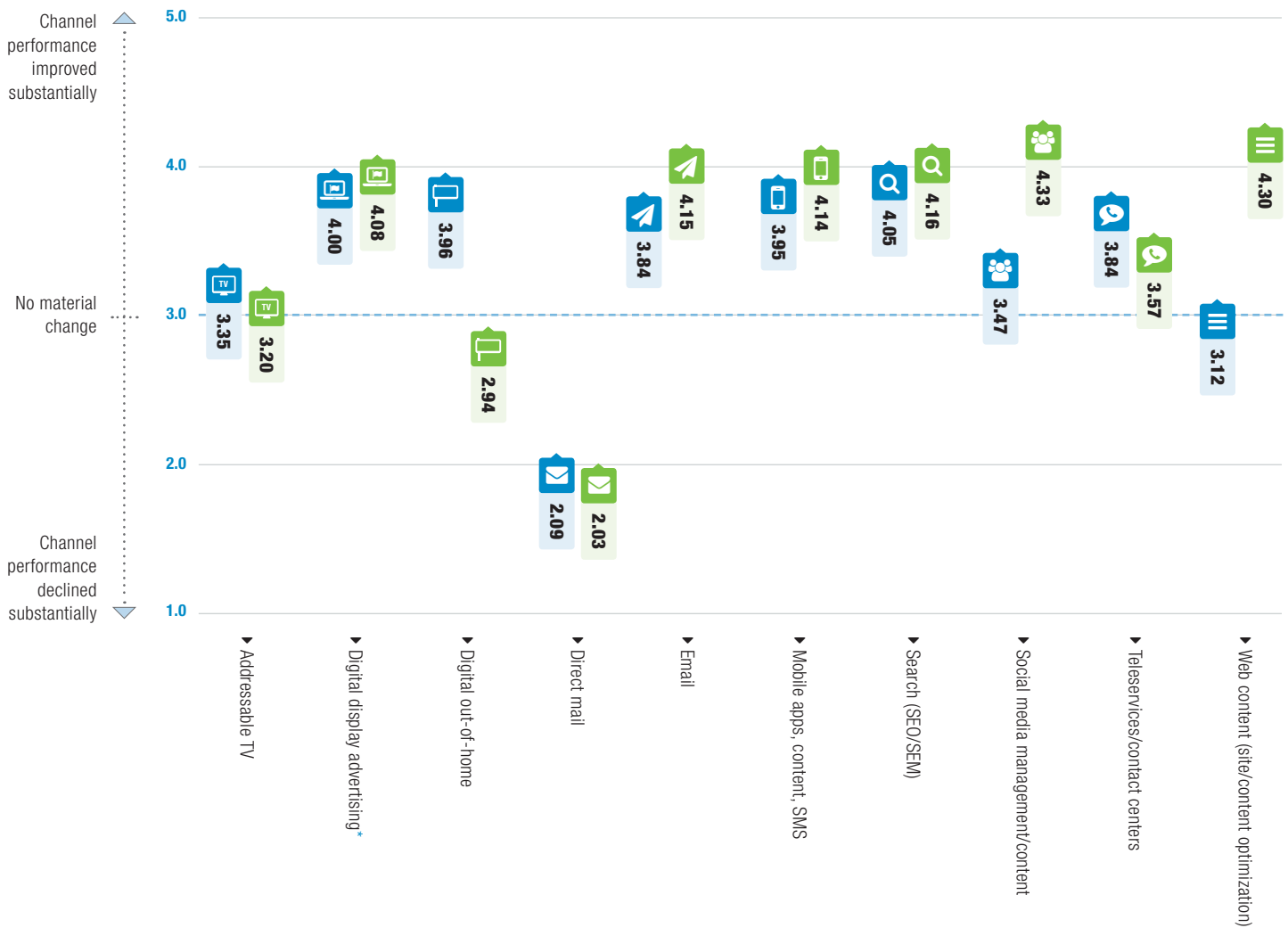


Note: Refer to page 18 of the 2015 *Global Review* for global averages

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



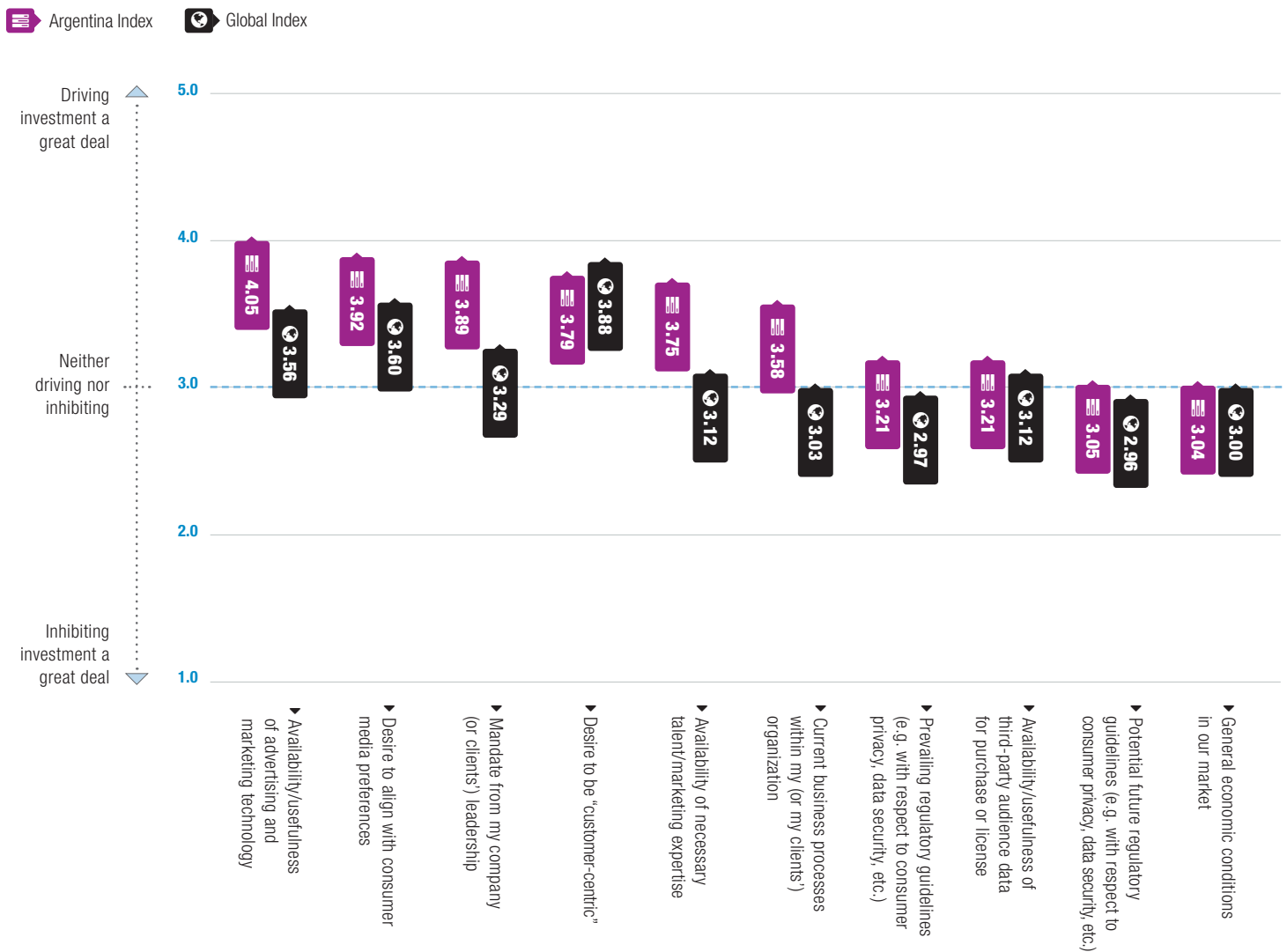
* Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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

What's driving the practice of DDMA? What's inhibiting it?

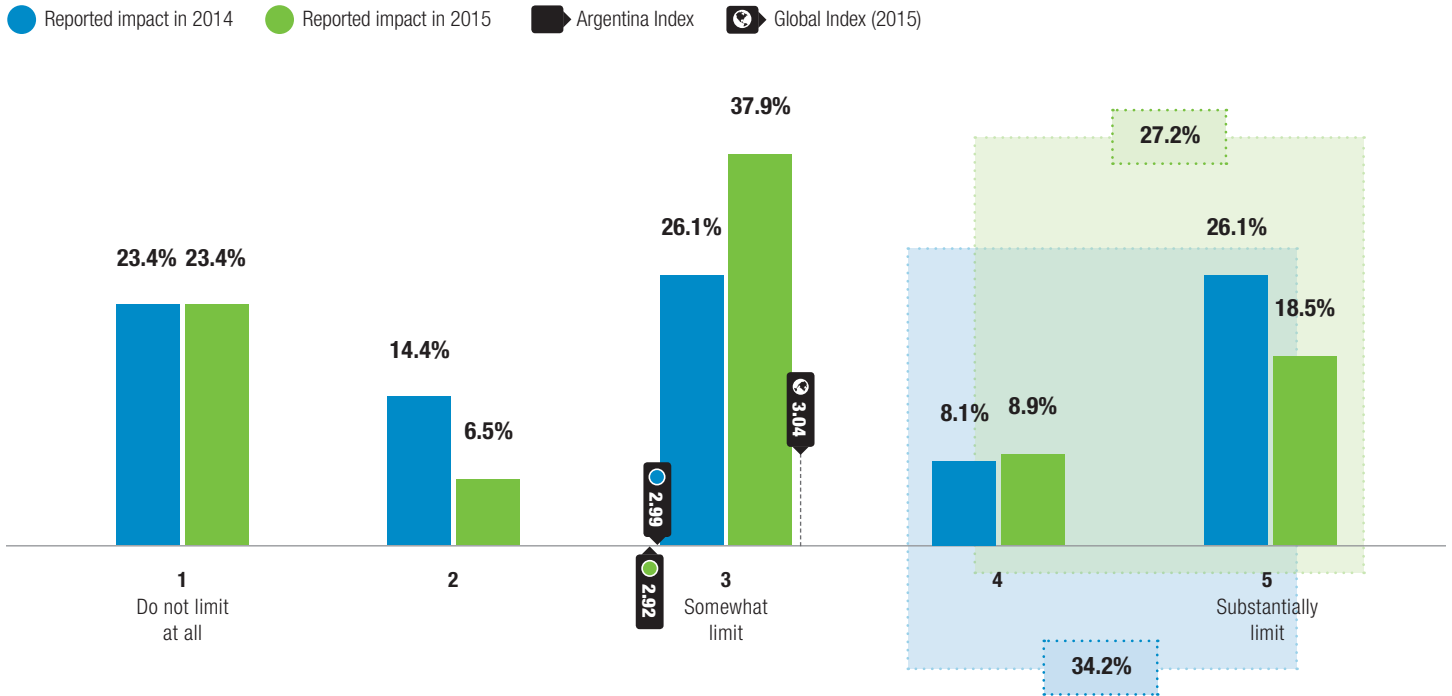
FACTORS DRIVING OR INHIBITING DDMA

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



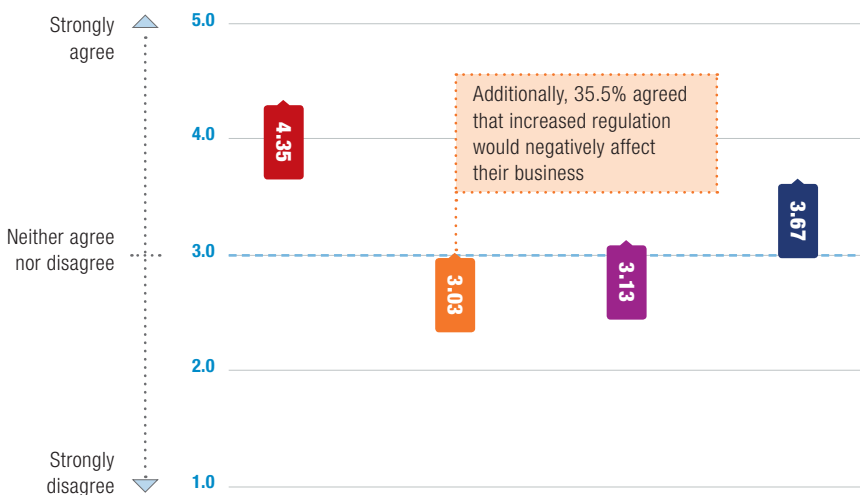
IMPACT OF REGULATION

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?



Australia





Australia

PANEL:
467 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY – SEPTEMBER 2015

* Not all respondents answered every question

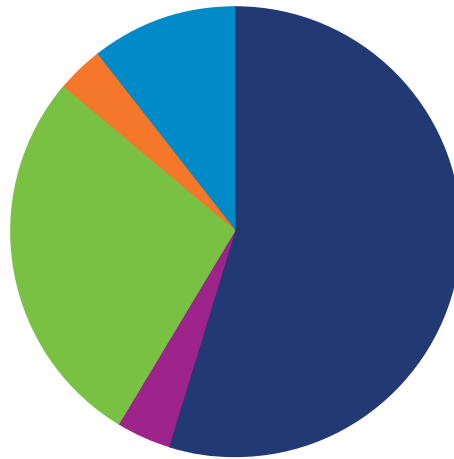
PRESENTING ASSOCIATION



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?

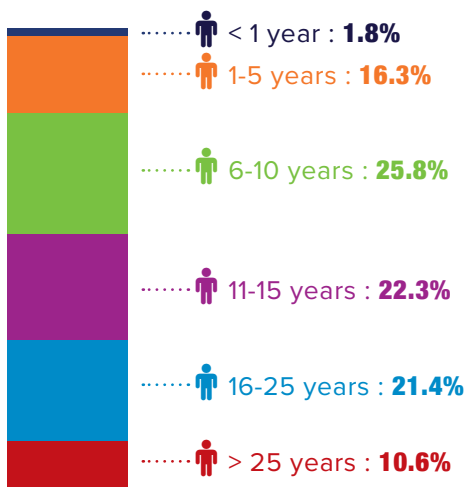


- **MARKETER/ADVERTISER : 54.8%**
- **PUBLISHER/MEDIA : 3.9%**
(focused on selling advertising)
- **PROVIDER OF MARKETING SERVICES : 27.6%**
(including data and agency services)
- **DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY : 3.2%**
- **OTHER : 10.5%**

EXPERIENCE

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

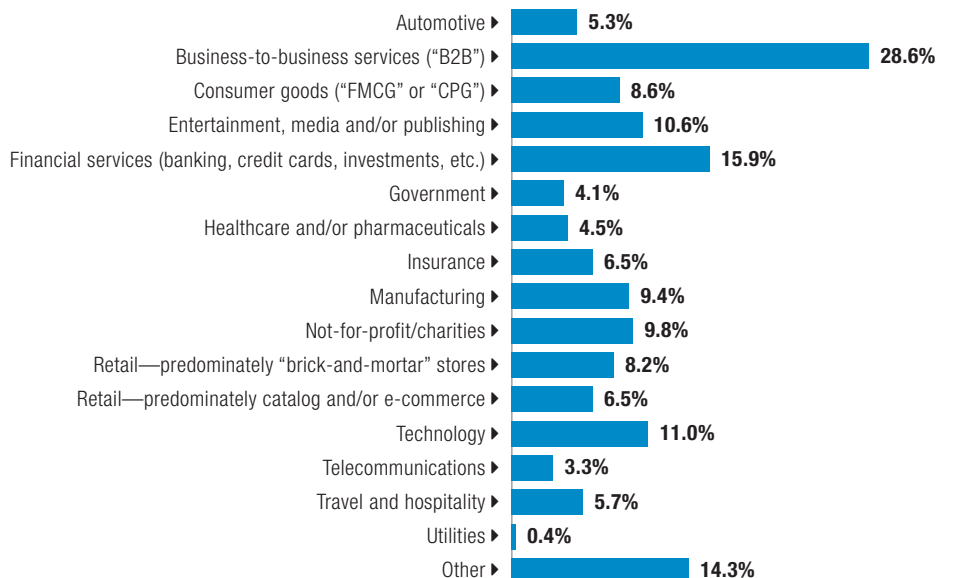
Please consider your current job and past professional roles that may apply.



INDUSTRY REPRESENTATION

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

Displaying panelists' "top three" responses

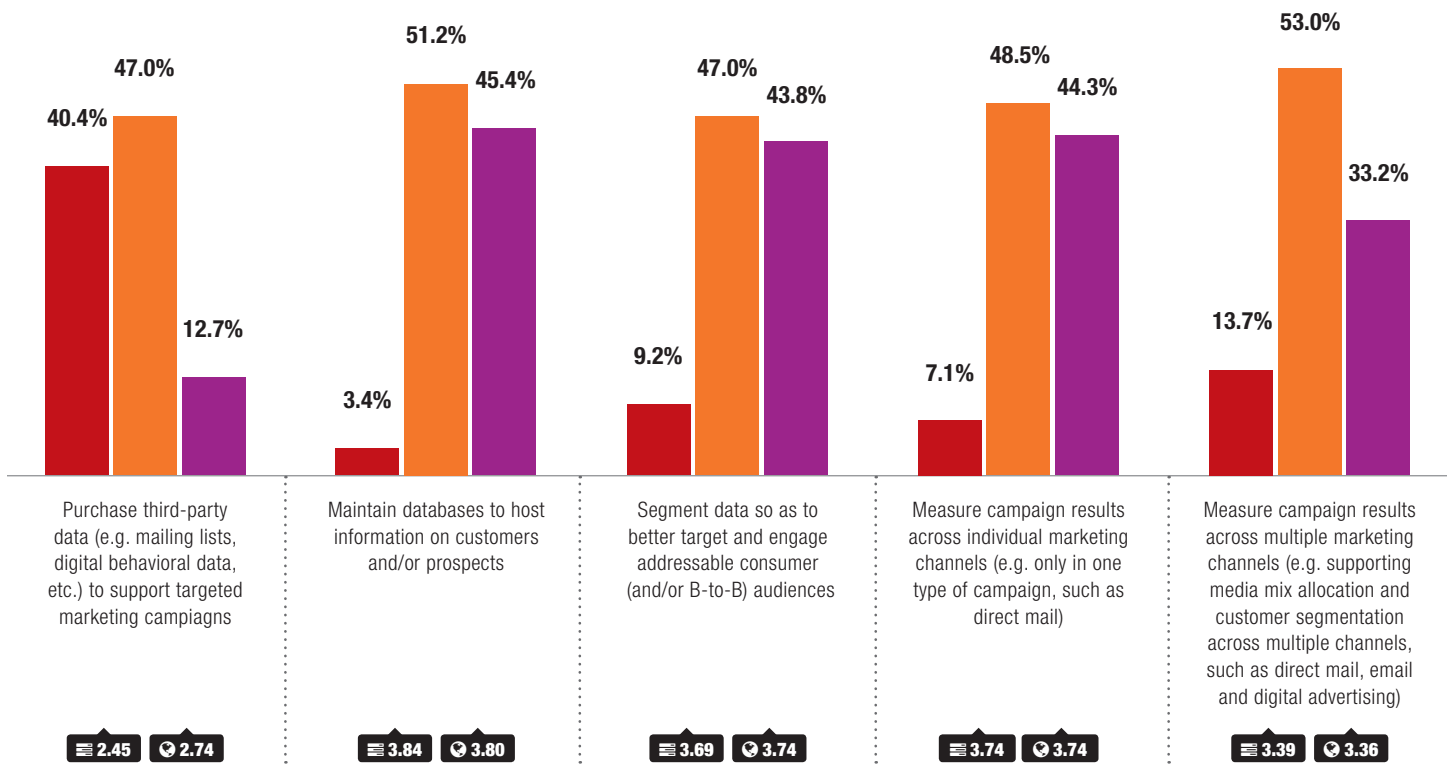


What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

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

Australia Index

Global Index

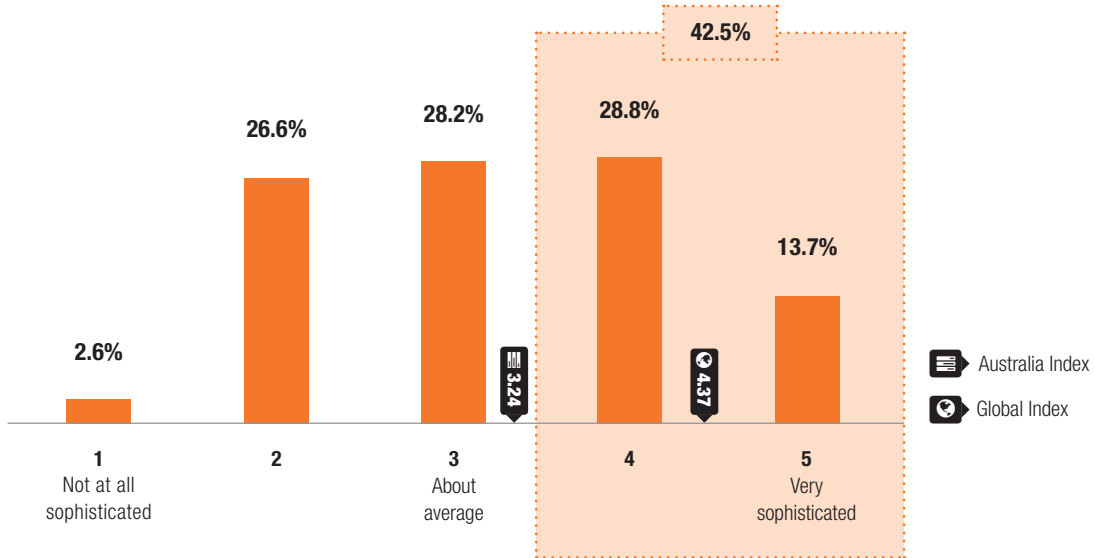
A NOTE ABOUT INDEX SCORES

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.

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DDMA SOPHISTICATION

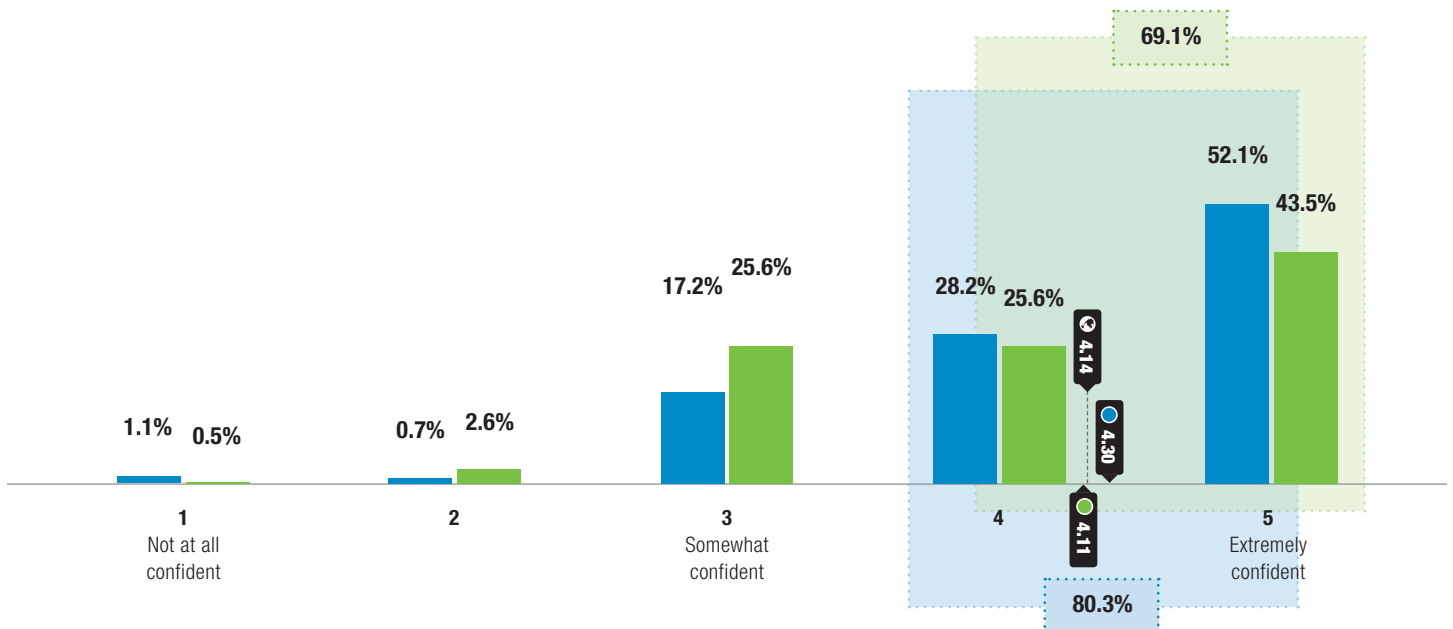
How sophisticated is your organization's data-driven marketing and advertising (DDMA) approach?



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?

● 2014 ● 2015 ■ Australia Index ■ Global Index (2015)

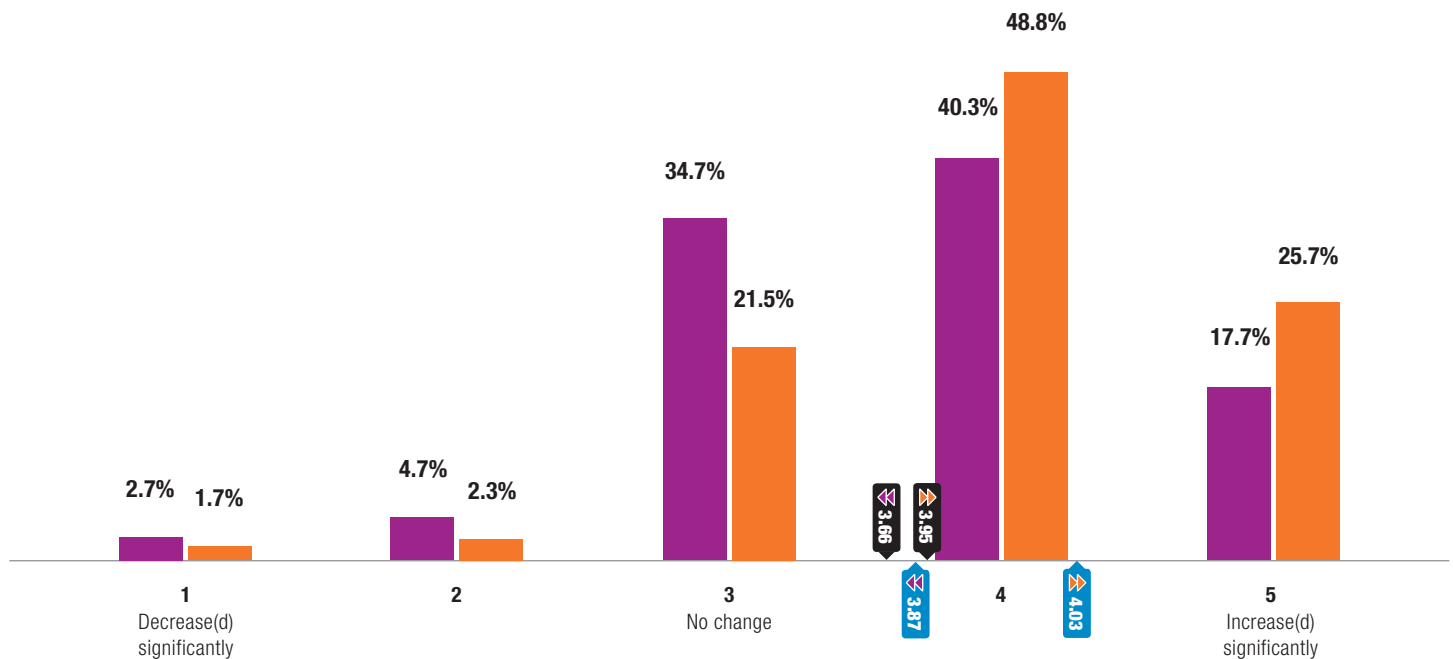


How are practitioners investing in DDMA? What returns are they generating?

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?

◀ The past year ▶ The coming year Australia Index (2014) Australia Index (2015)

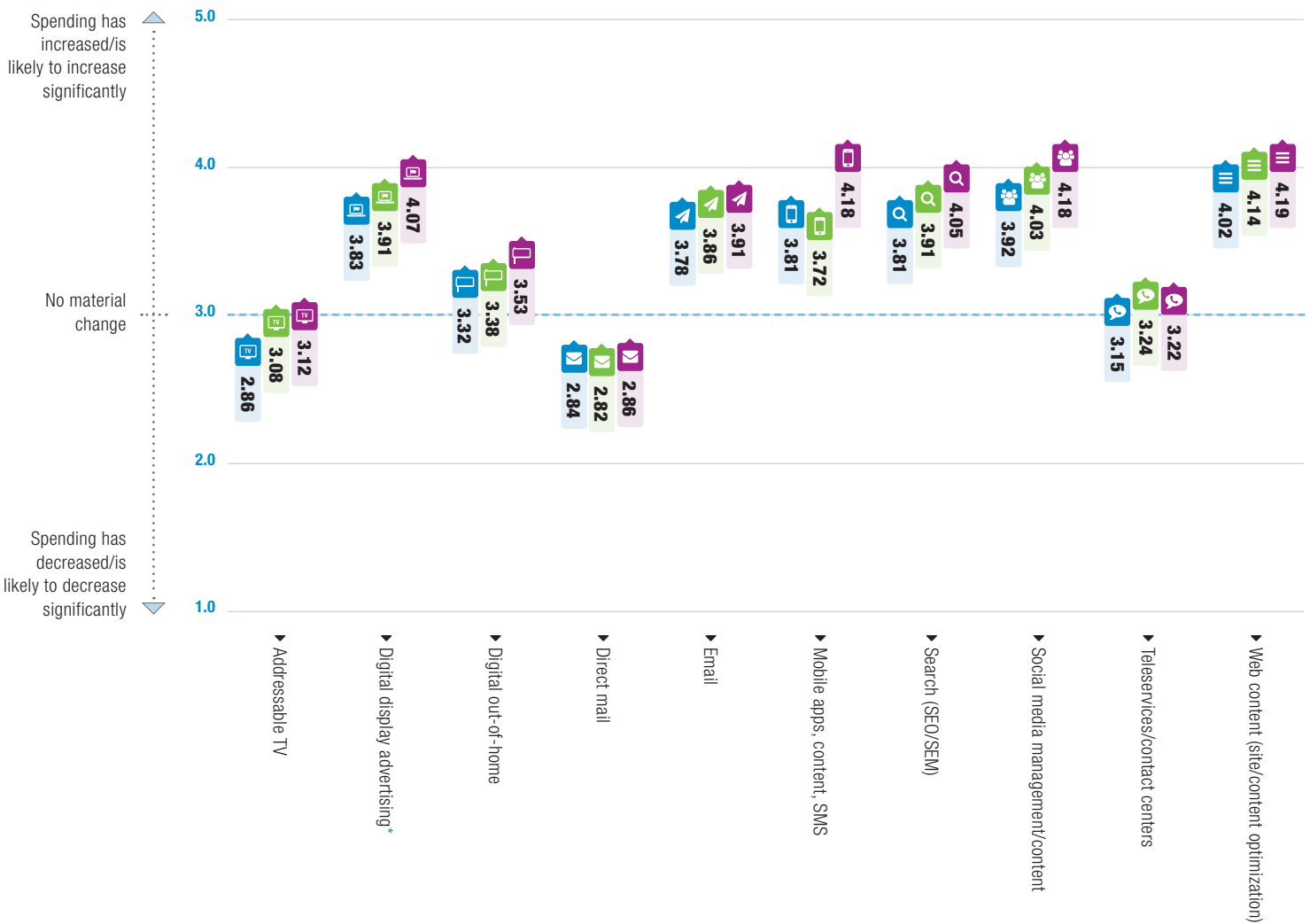


Note: Refer to page 16 of the 2015 *Global Review* for global averages

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?

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



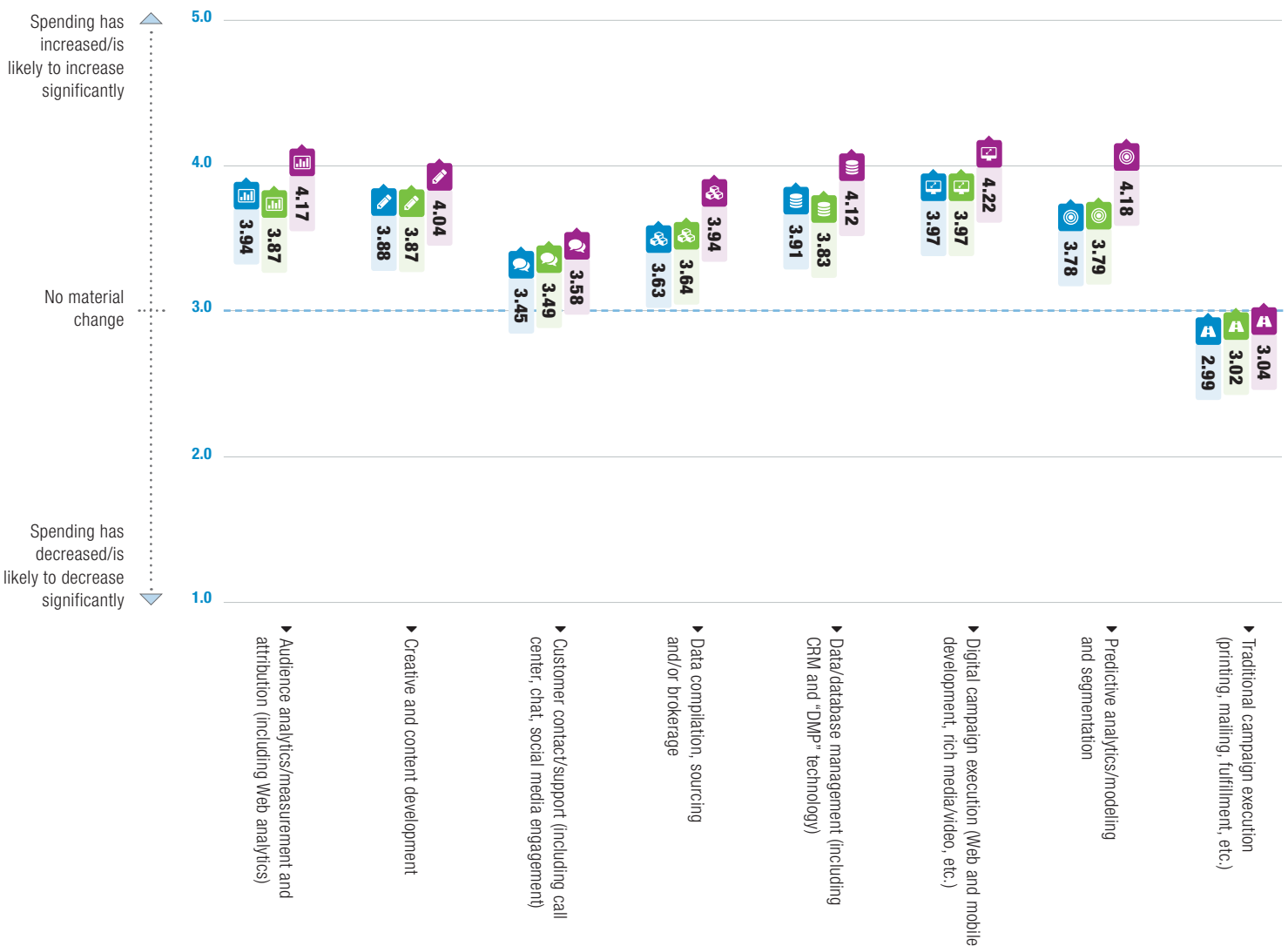
*Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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?

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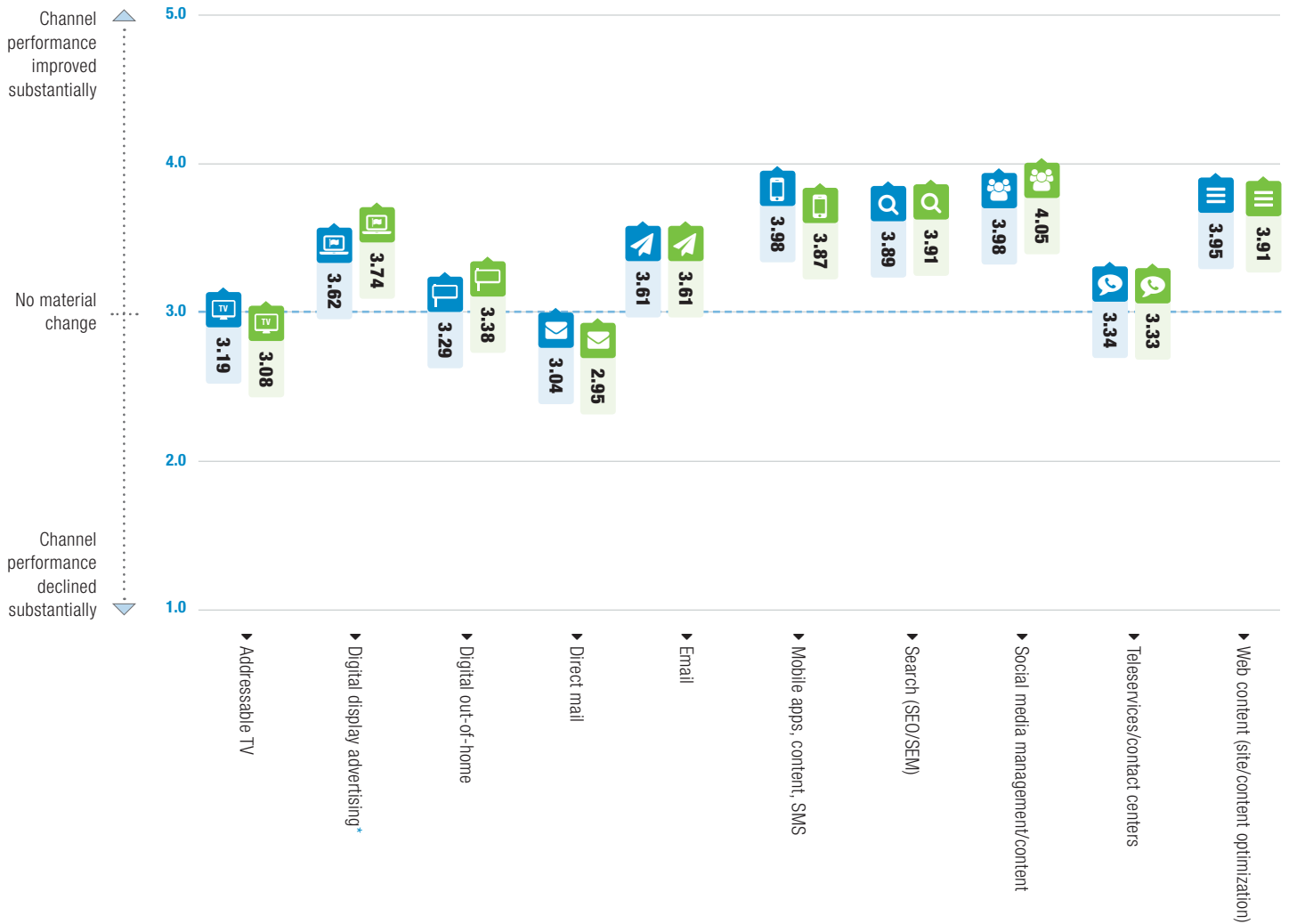


Note: Refer to page 18 of the 2015 *Global Review* for global averages

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



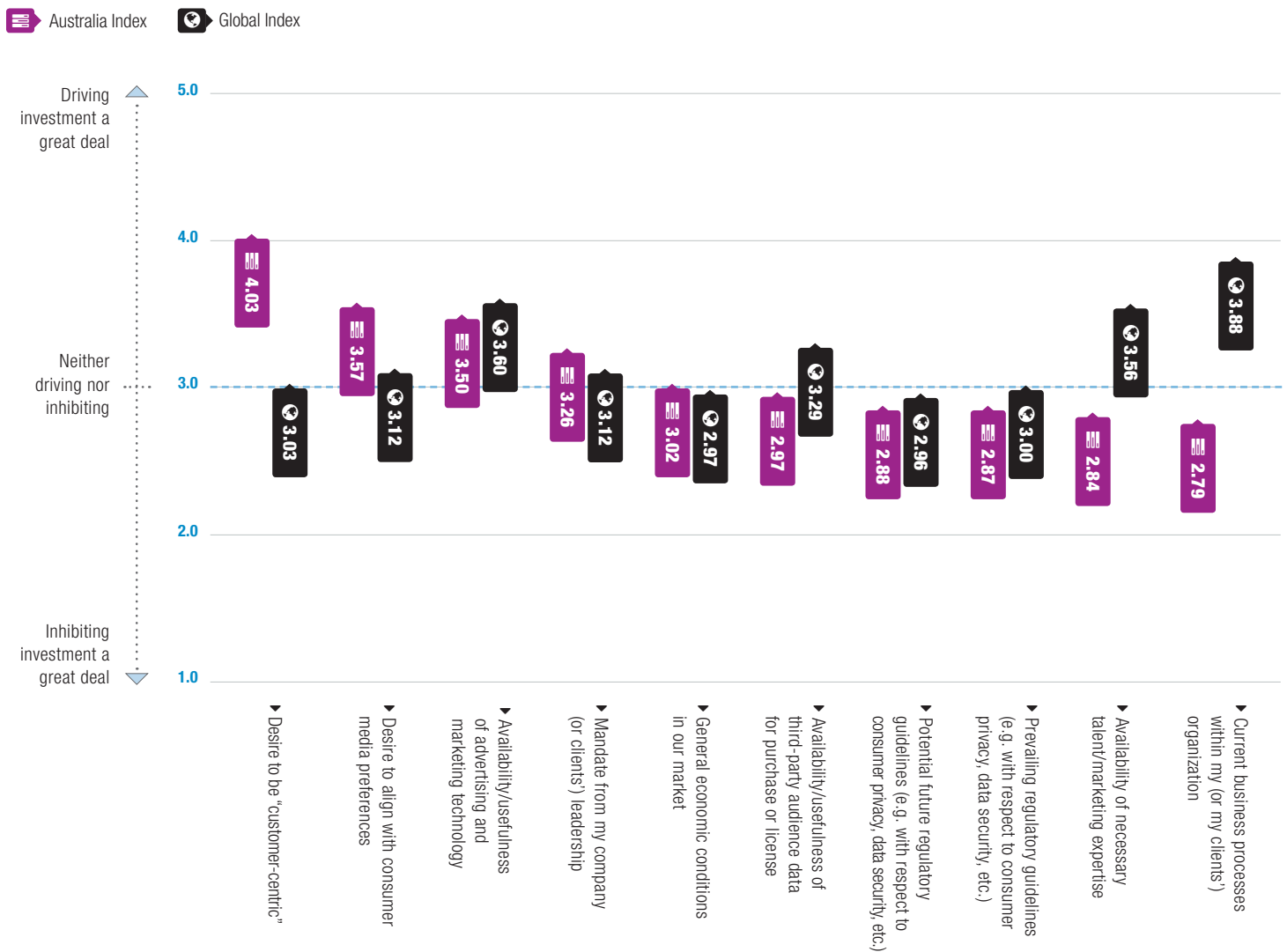
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Note: Refer to page 19 of the 2015 *Global Review* for global averages

What's driving the practice of DDMA? What's inhibiting it?

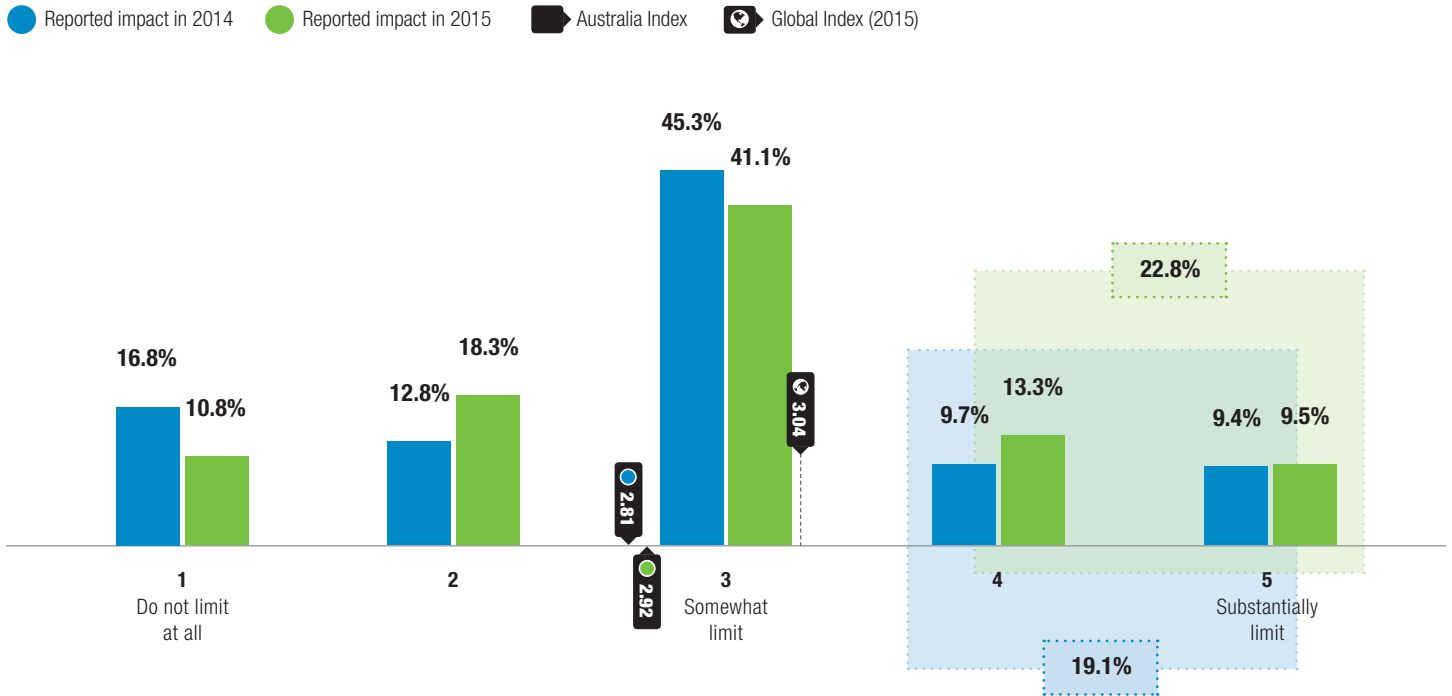
FACTORS DRIVING OR INHIBITING DDMA

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



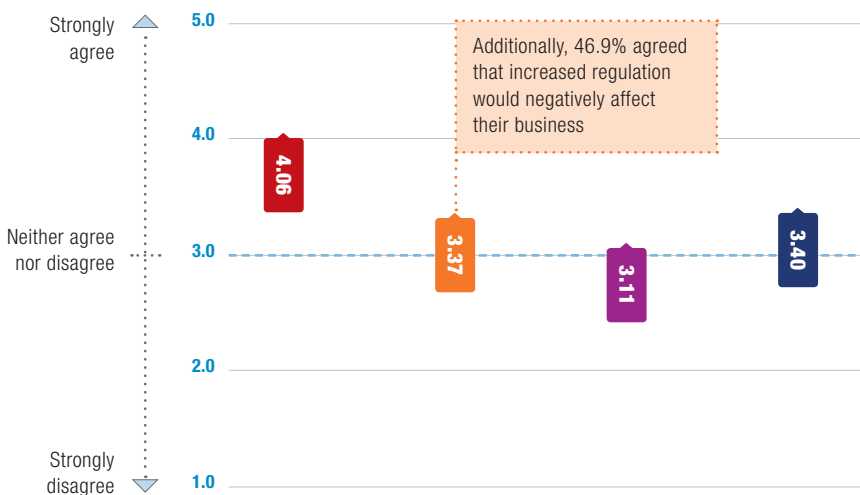
IMPACT OF REGULATION

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?



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- Regulations for marketing data use should be standardized across markets.

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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?



Belgium





Belgium

PANEL:
215 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY – AUGUST 2015

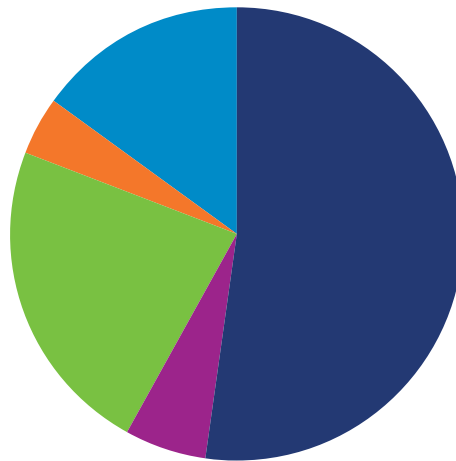
* Not all respondents answered every question

PRESENTING ASSOCIATION **bdma**
 Belgian Direct Marketing 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?

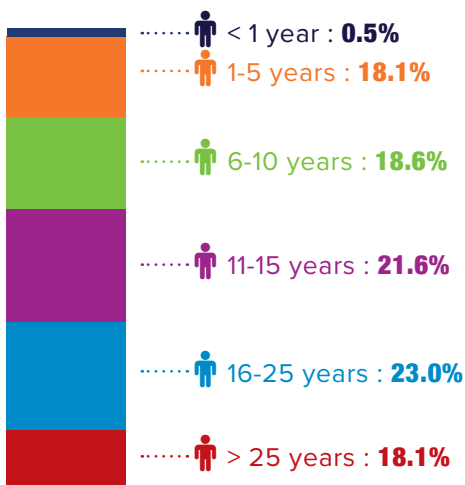


- **MARKETER/ADVERTISER : 52.6%**
- **PUBLISHER/MEDIA : 5.6%**
(focused on selling advertising)
- **PROVIDER OF MARKETING SERVICES : 22.8%**
(including data and agency services)
- **DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY : 4.2%**
- **OTHER : 14.9%**

EXPERIENCE

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

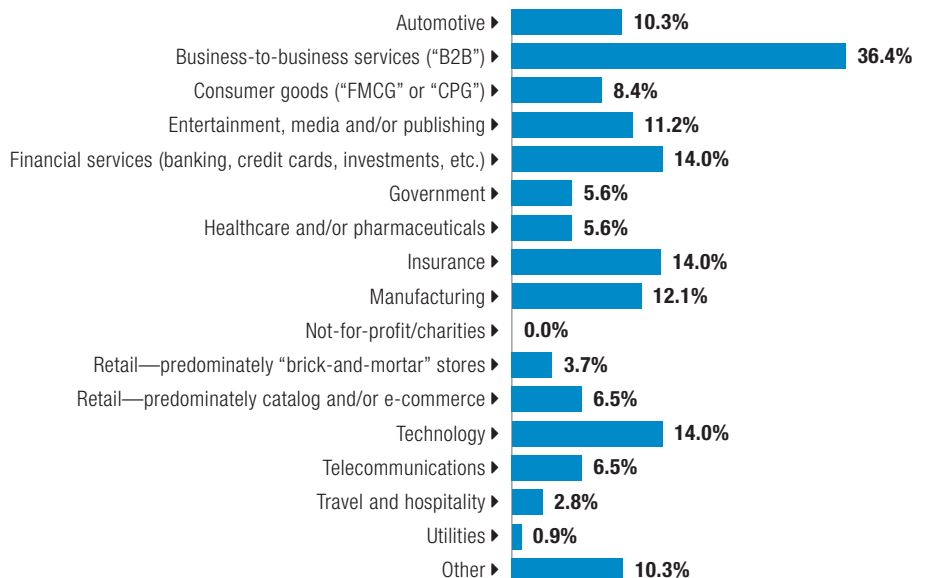
Please consider your current job and past professional roles that may apply.



INDUSTRY REPRESENTATION

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

Displaying panelists' "top three" responses

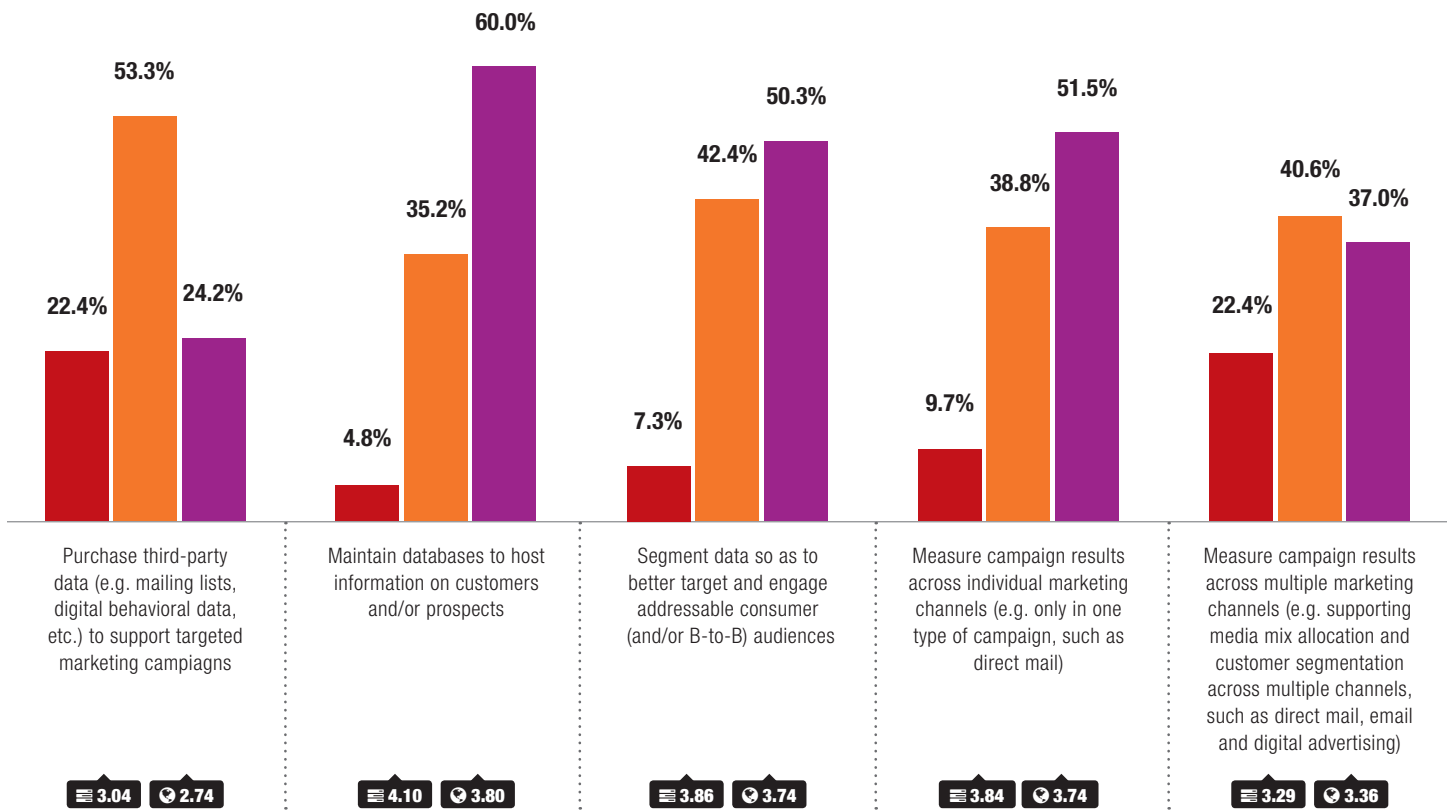


What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

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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☰ Belgium Index

🌐 Global Index

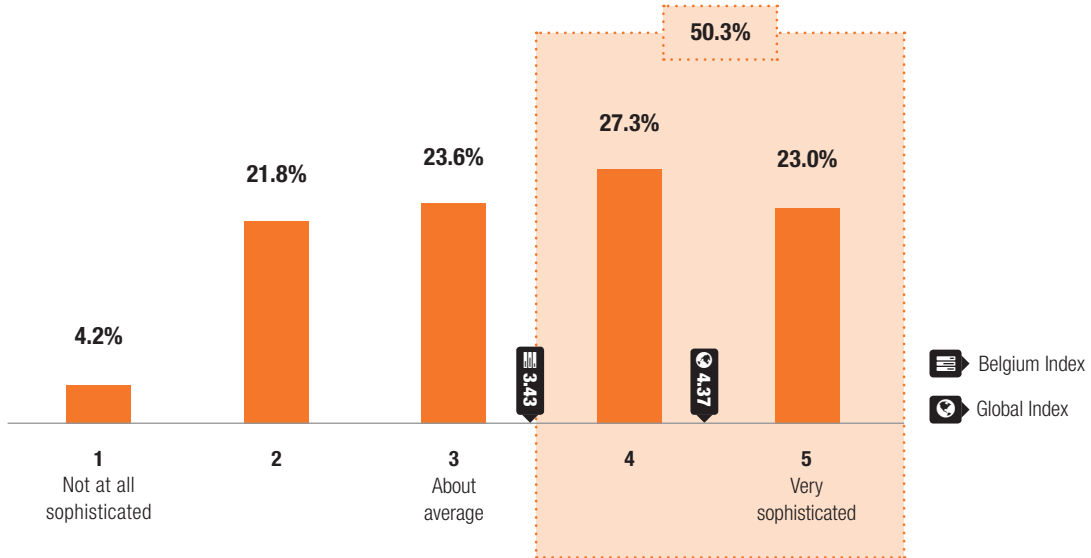
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DDMA SOPHISTICATION

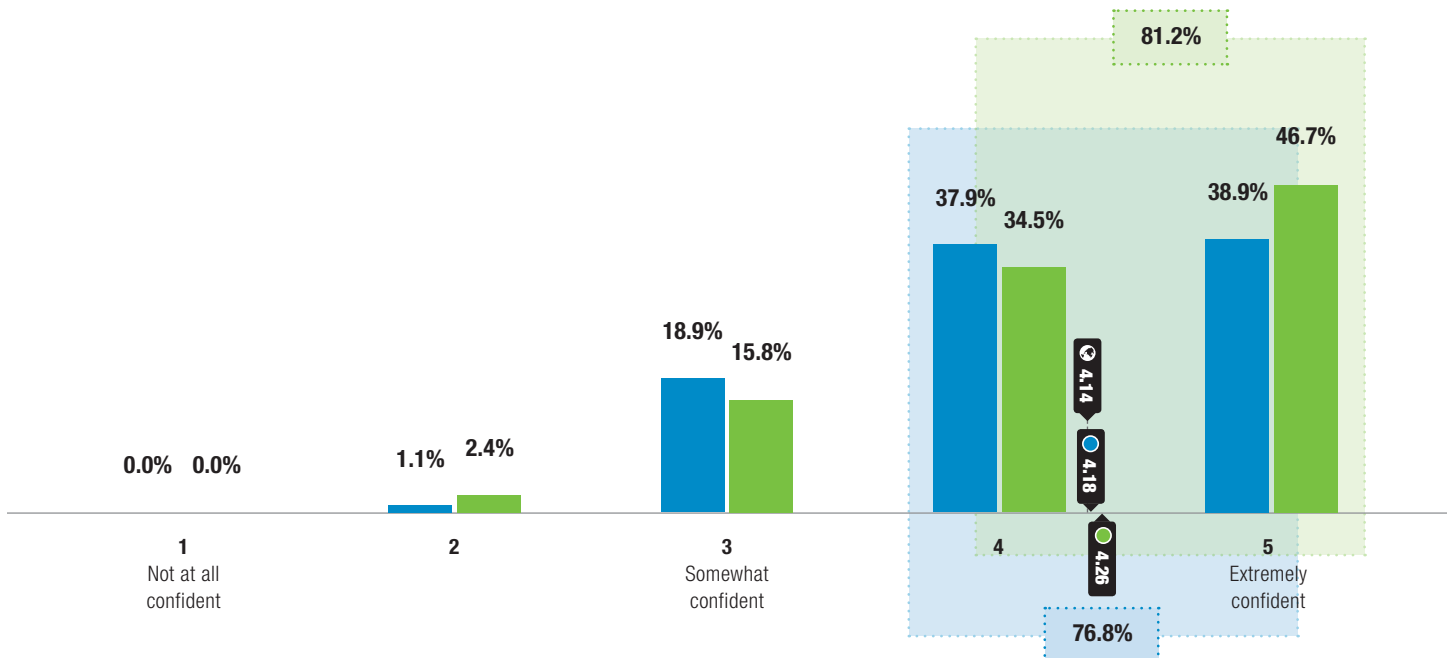
How sophisticated is your organization's data-driven marketing and advertising (DDMA) approach?



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?

● 2014 ● 2015 ■ Belgium Index ■ Global Index (2015)

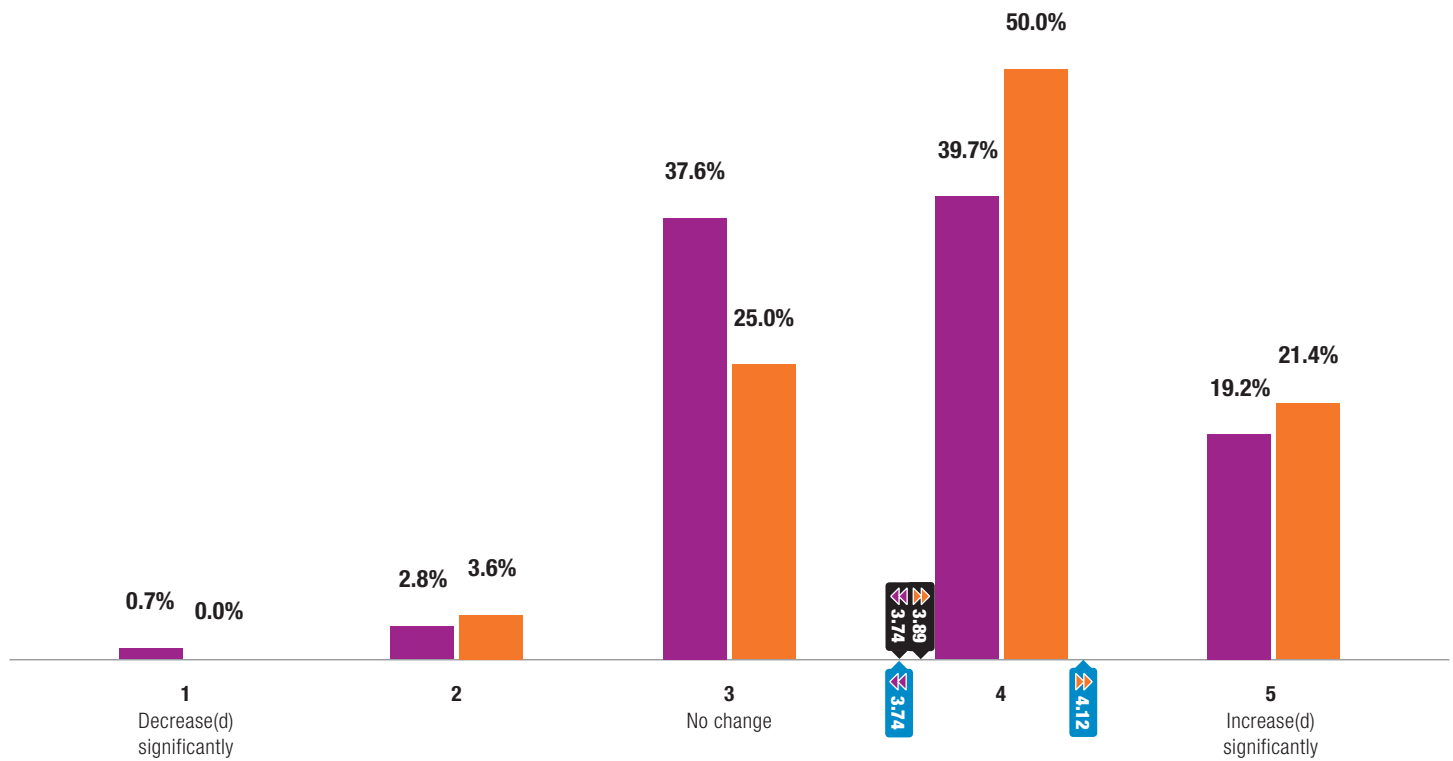


How are practitioners investing in DDMA? What returns are they generating?

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?

◀ The past year ▶ The coming year ■ Belgium Index (2015)

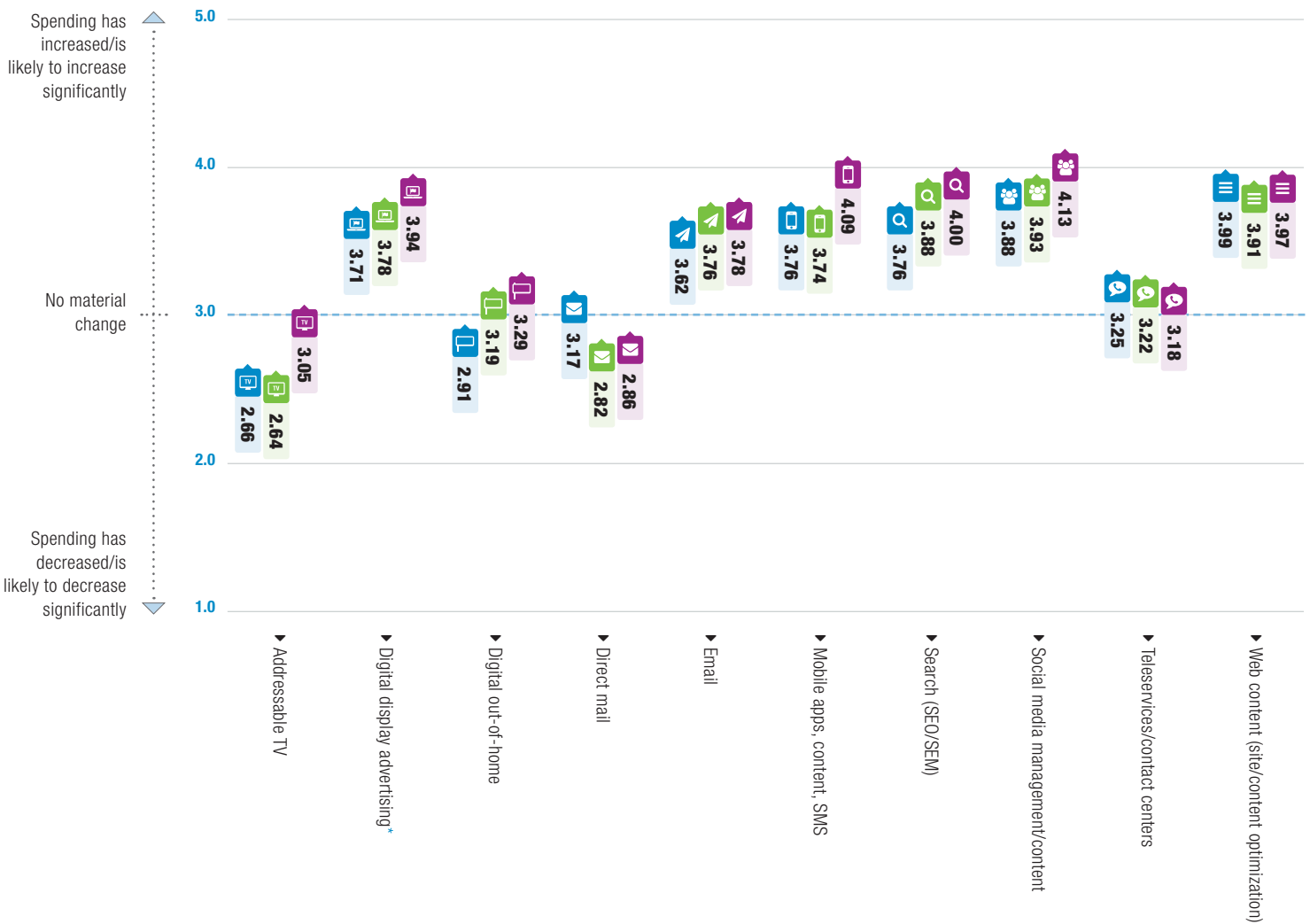


Note: Refer to page 16 of the 2015 *Global Review* for global averages

SPENDING ON DDMA CHANNELS

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



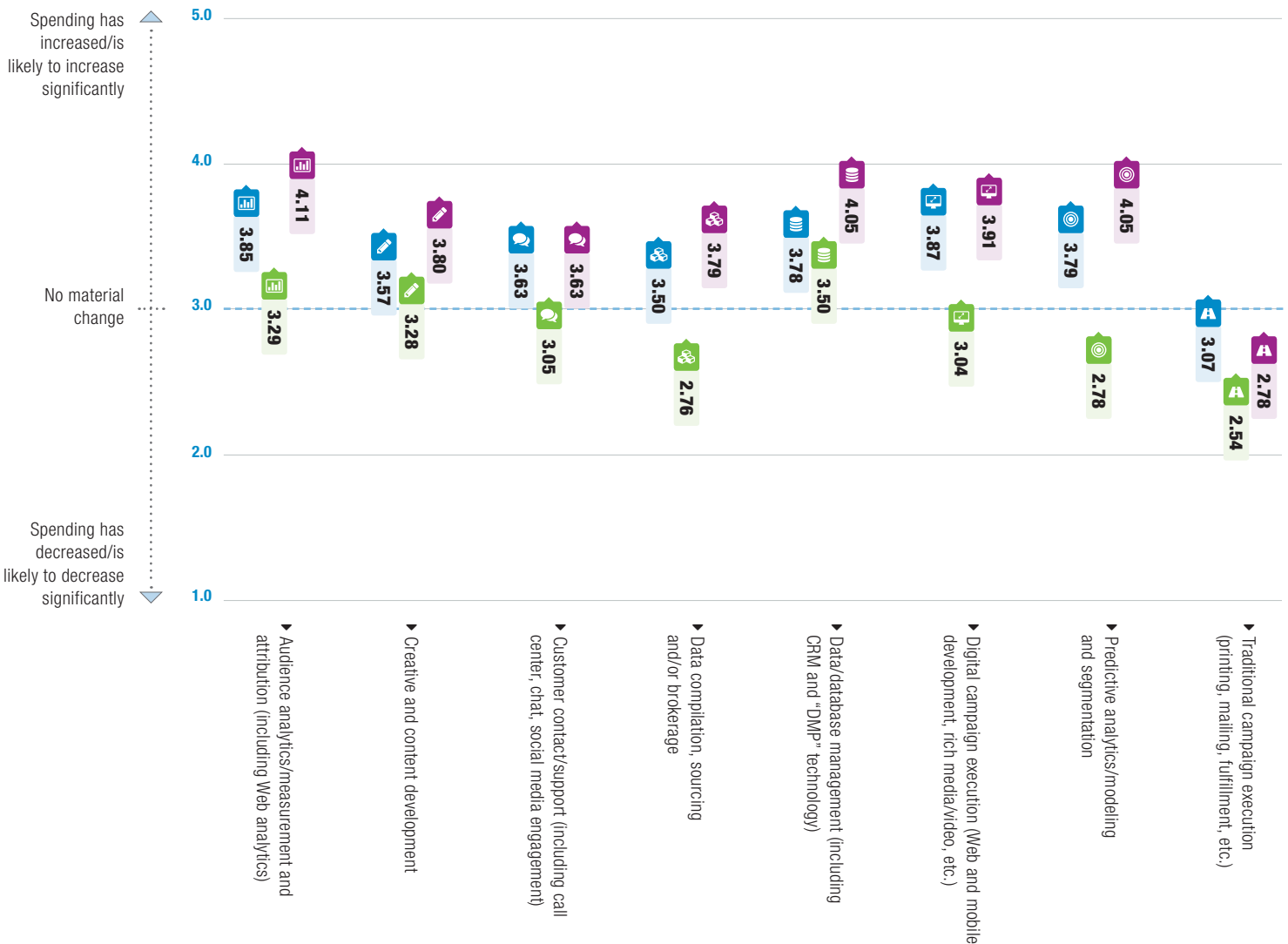
*Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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



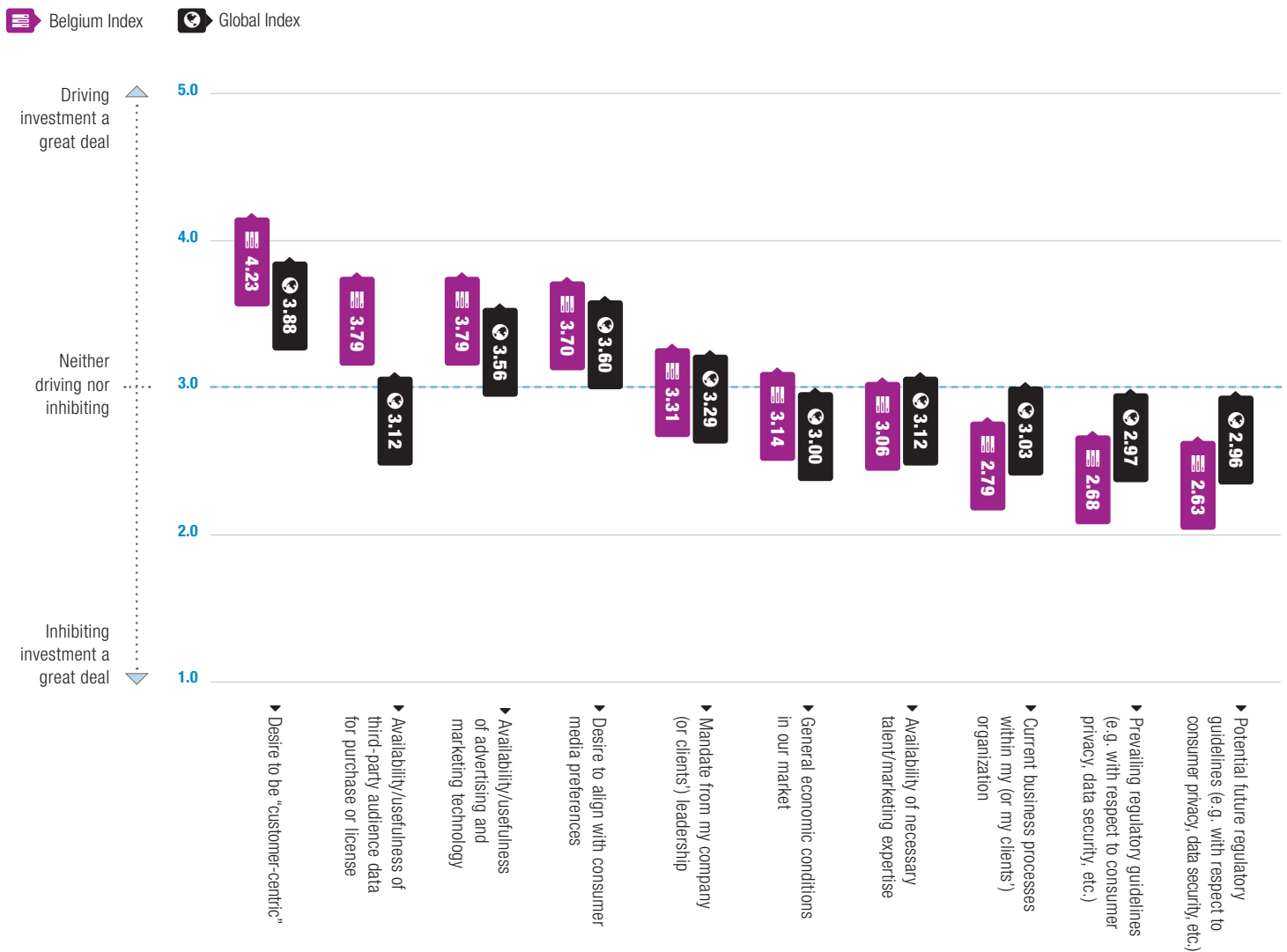
* Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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

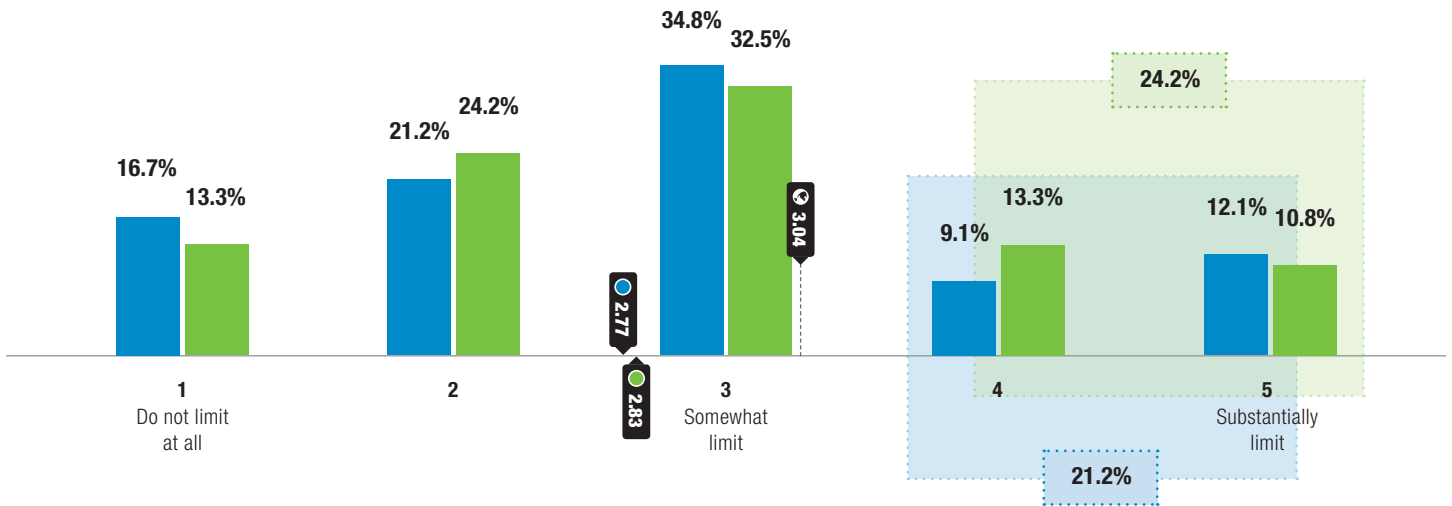
To what extent are each of the following factors driving or inhibiting your (or your clients') investment in DDMA?



IMPACT OF REGULATION

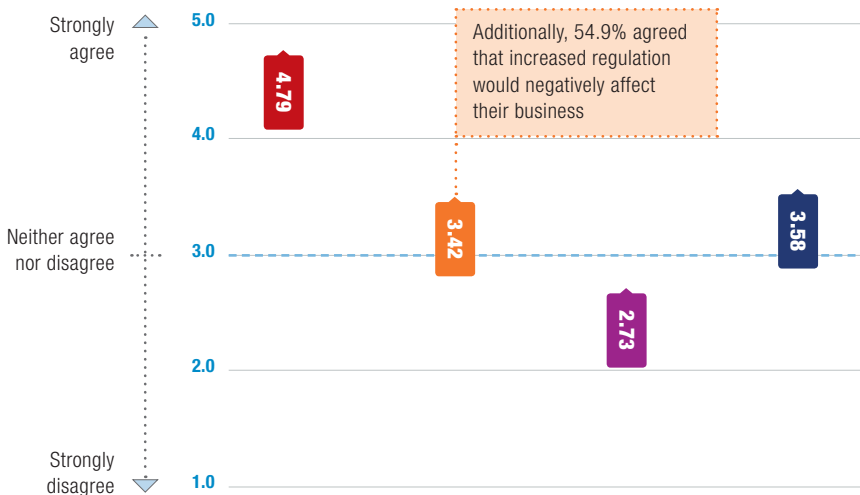
To what extent are regulatory barriers in your marketplace (e.g. limits on access to data, requirements for affirmative consumer opt-in to marketing communications, etc.) actively limiting your ability to pursue data-driven marketing and advertising initiatives?

● Reported impact in 2014
 ● Reported impact in 2015
 ▶ Belgium Index
 ▶ Global Index (2015)



PERSPECTIVES ON REGULATION

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



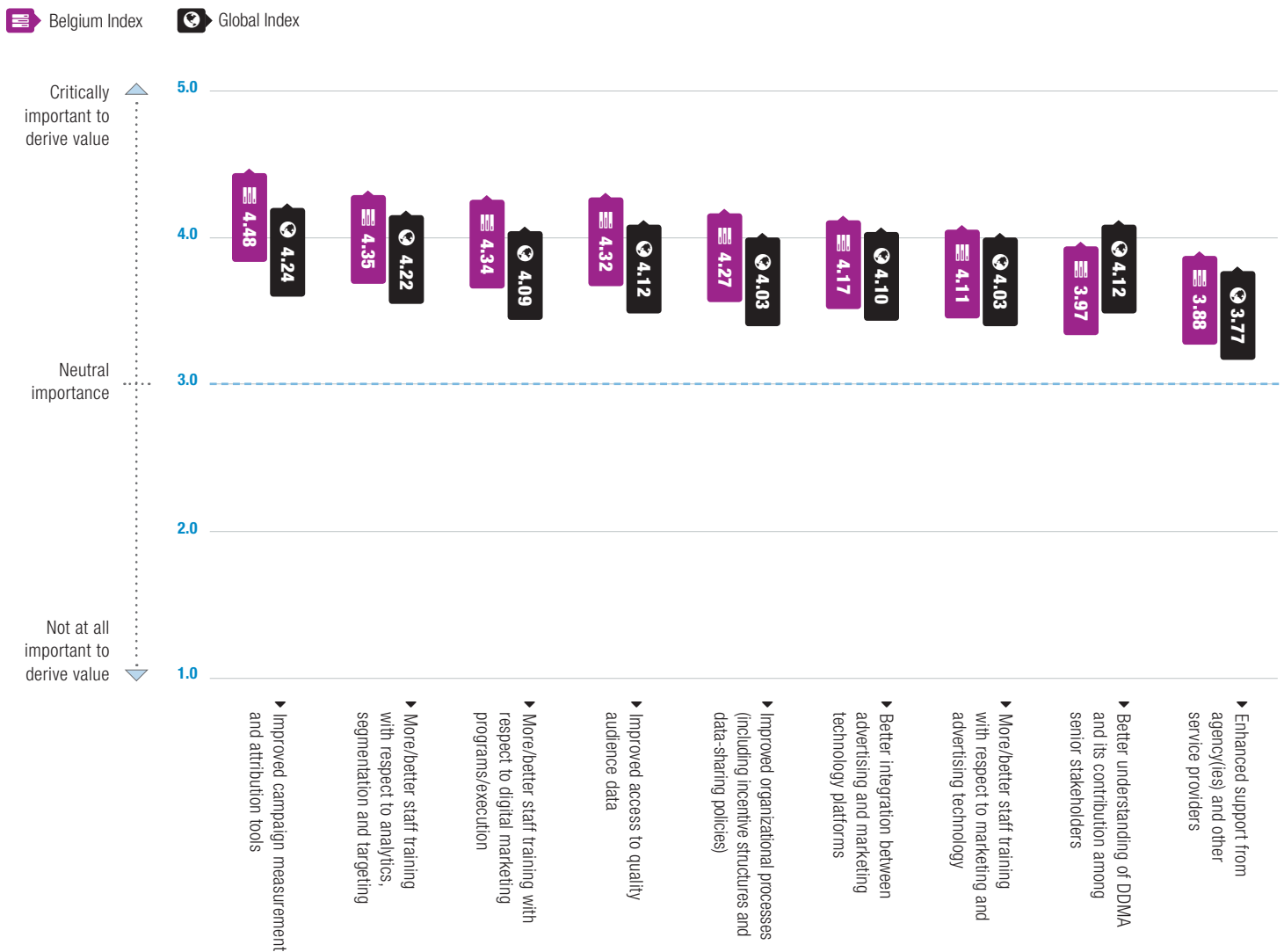
- Good marketing data governance represents a competitive advantage for its practitioners.
- I fear that increased regulation of the use of marketing data in my market will negatively affect my business.
- Practicing data-driven marketing is easier in my market than in others.
- Regulations for marketing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



Brazil





Brazil

PANEL:
523 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY – AUGUST 2015

* Not all respondents answered every question

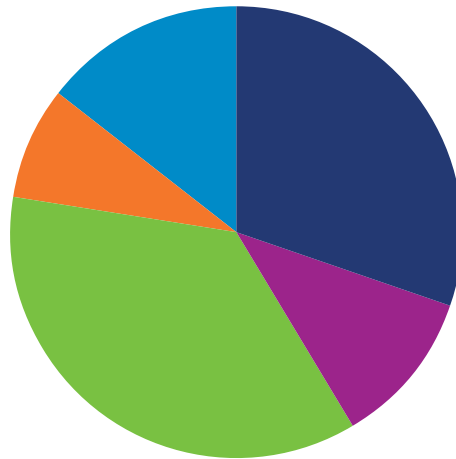
PRESENTING ASSOCIATION

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



PANEL COMPOSITION

How would you describe your principal role/business focus?

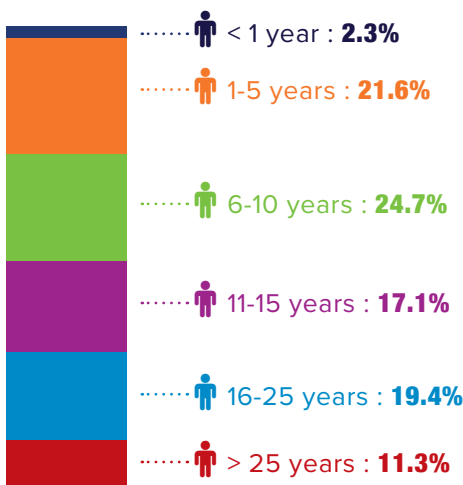


- MARKETER/ADVERTISER : **30.4%**
- PUBLISHER/MEDIA : **11.1%** (focused on selling advertising)
- PROVIDER OF MARKETING SERVICES : **36.1%** (including data and agency services)
- DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY : **8.0%**
- OTHER : **14.3%**

EXPERIENCE

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

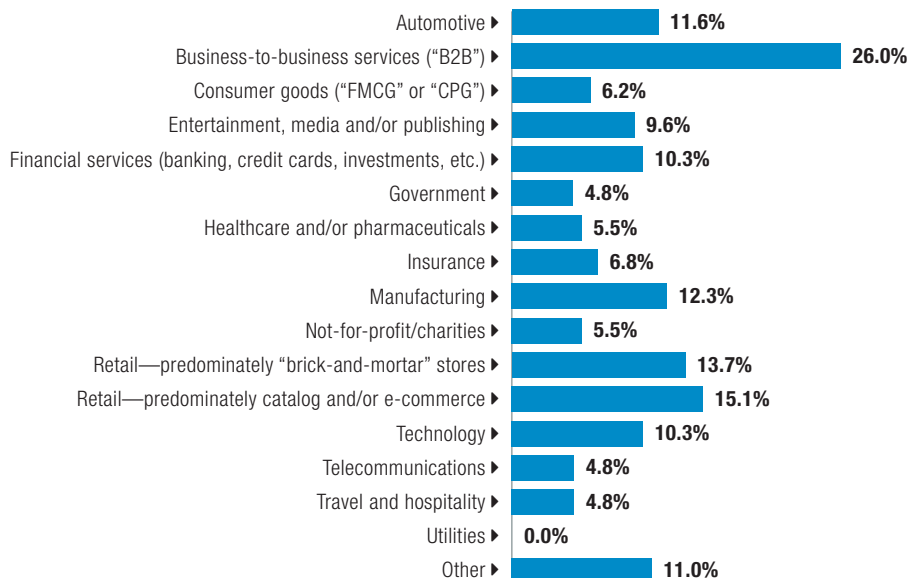
Please consider your current job and past professional roles that may apply.



INDUSTRY REPRESENTATION

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

Displaying panelists' "top three" responses

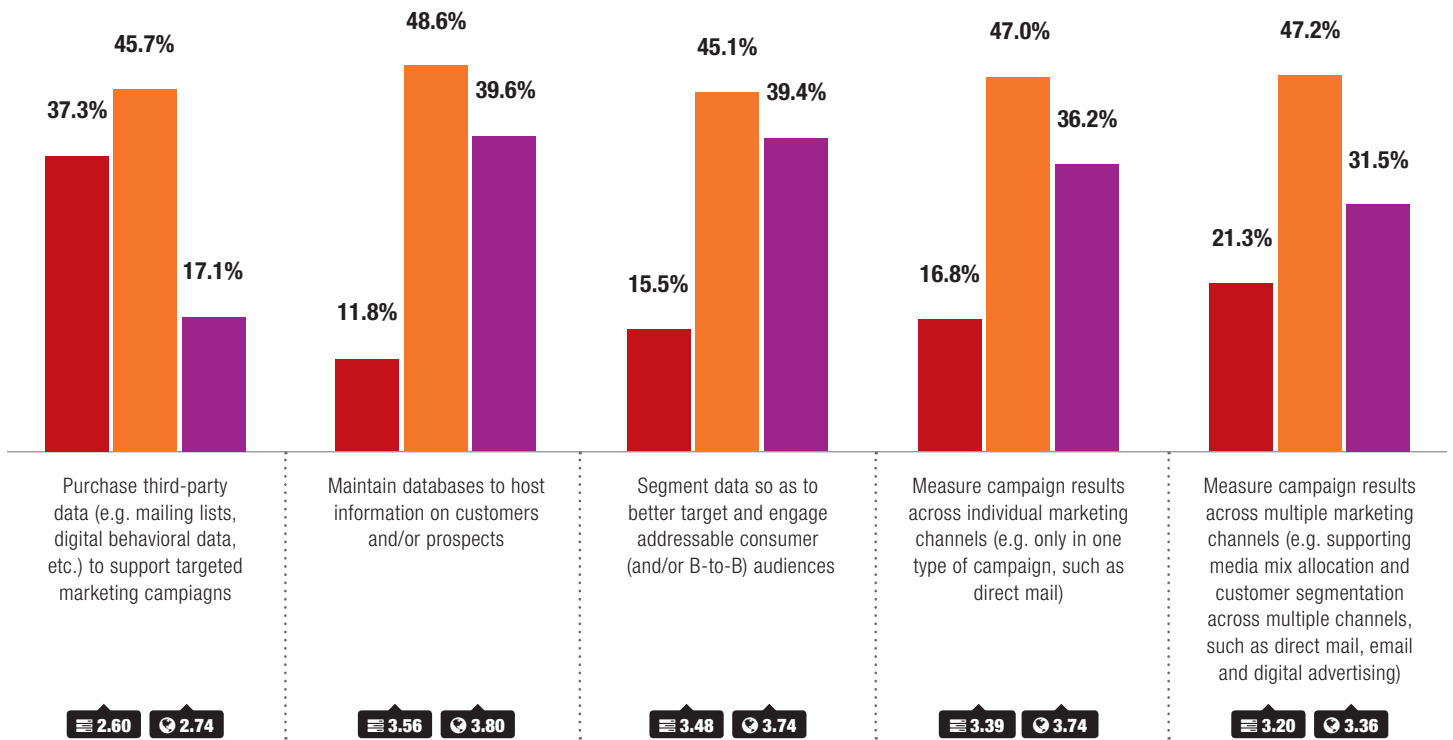


What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

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

Brazil Index

Global Index

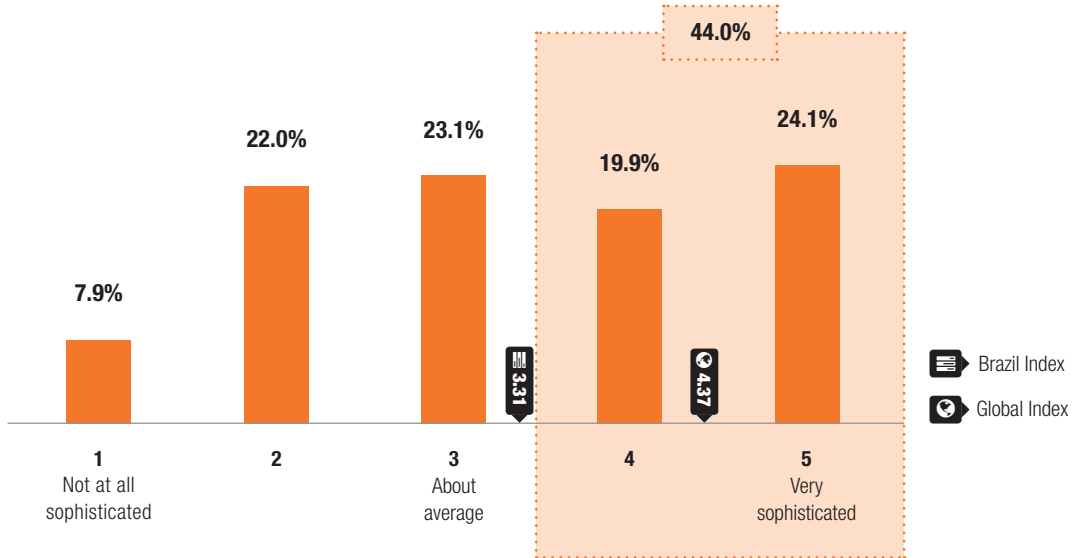
A NOTE ABOUT INDEX SCORES

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

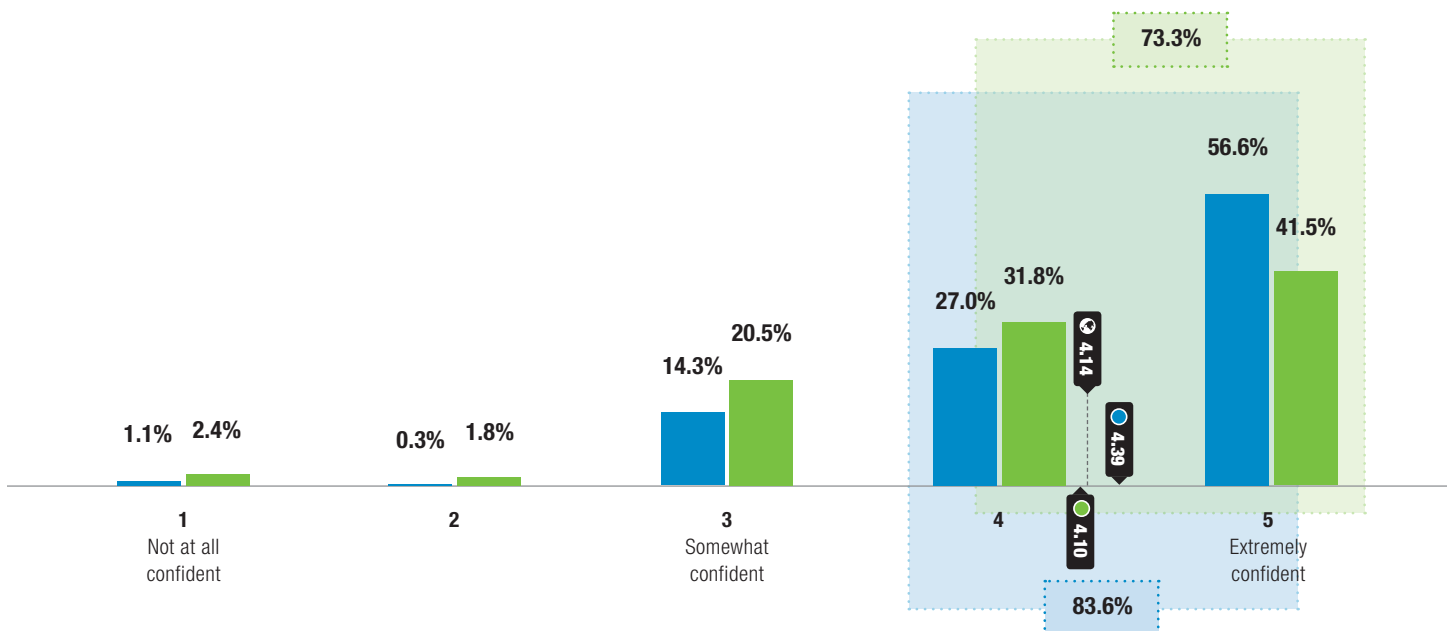
How sophisticated is your organization's data-driven marketing and advertising (DDMA) approach?



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?

● 2014 ● 2015 ■ Brazil Index ■ Global Index (2015)

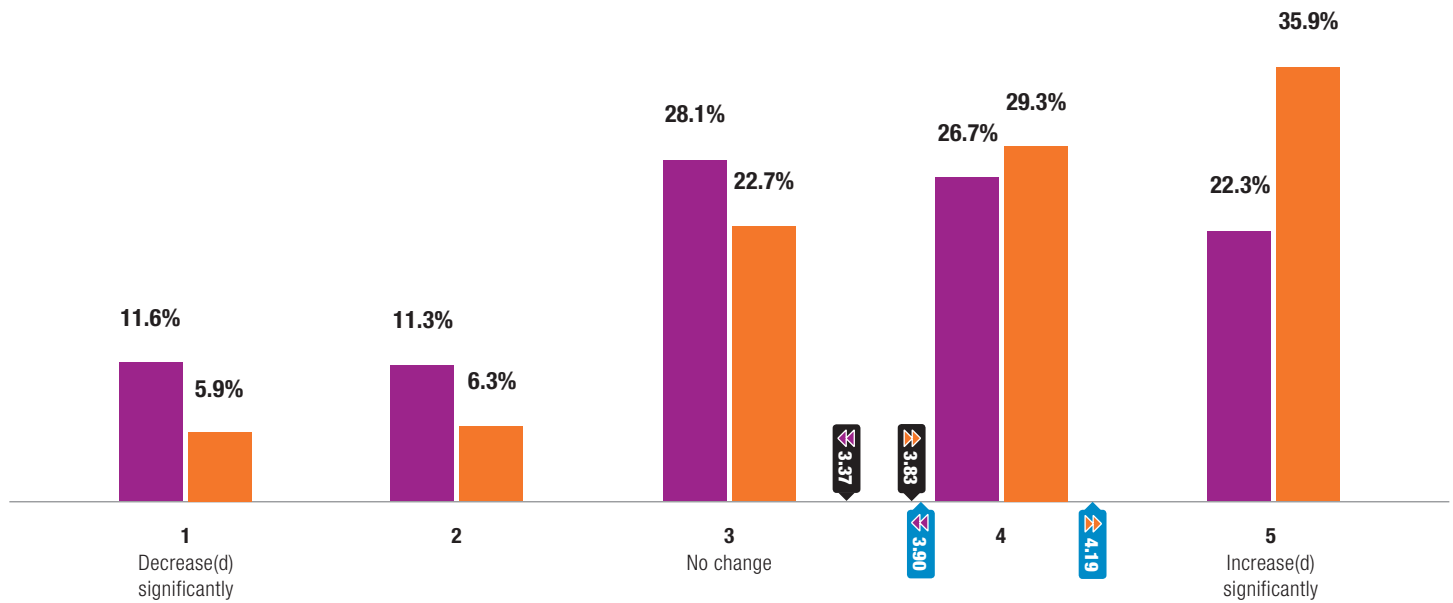


How are practitioners investing in DDMA? What returns are they generating?

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?

◀ The past year
 ▶ The coming year
 ▢ Brazil Index (2014)
 ▢ Brazil 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



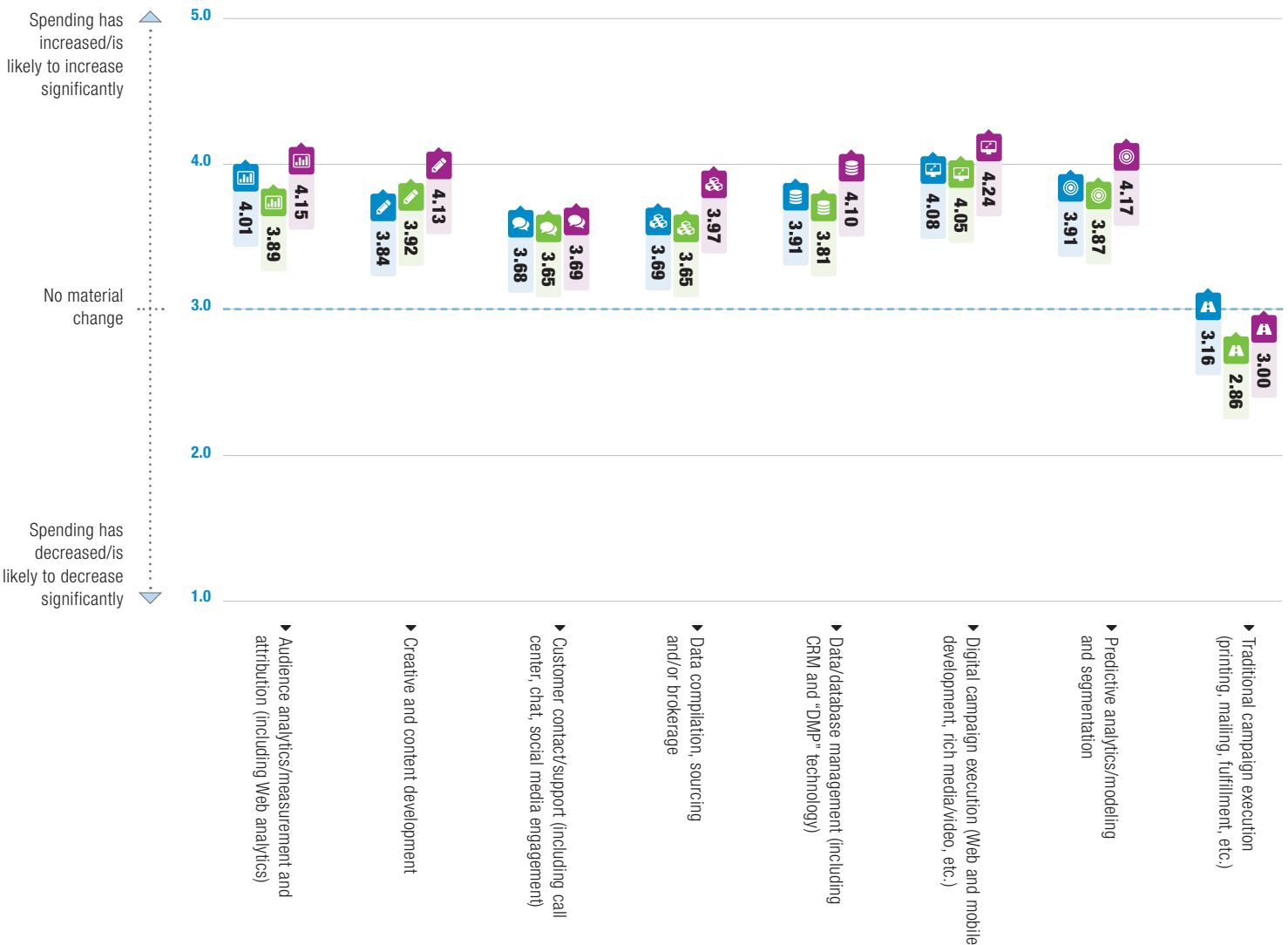
*Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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

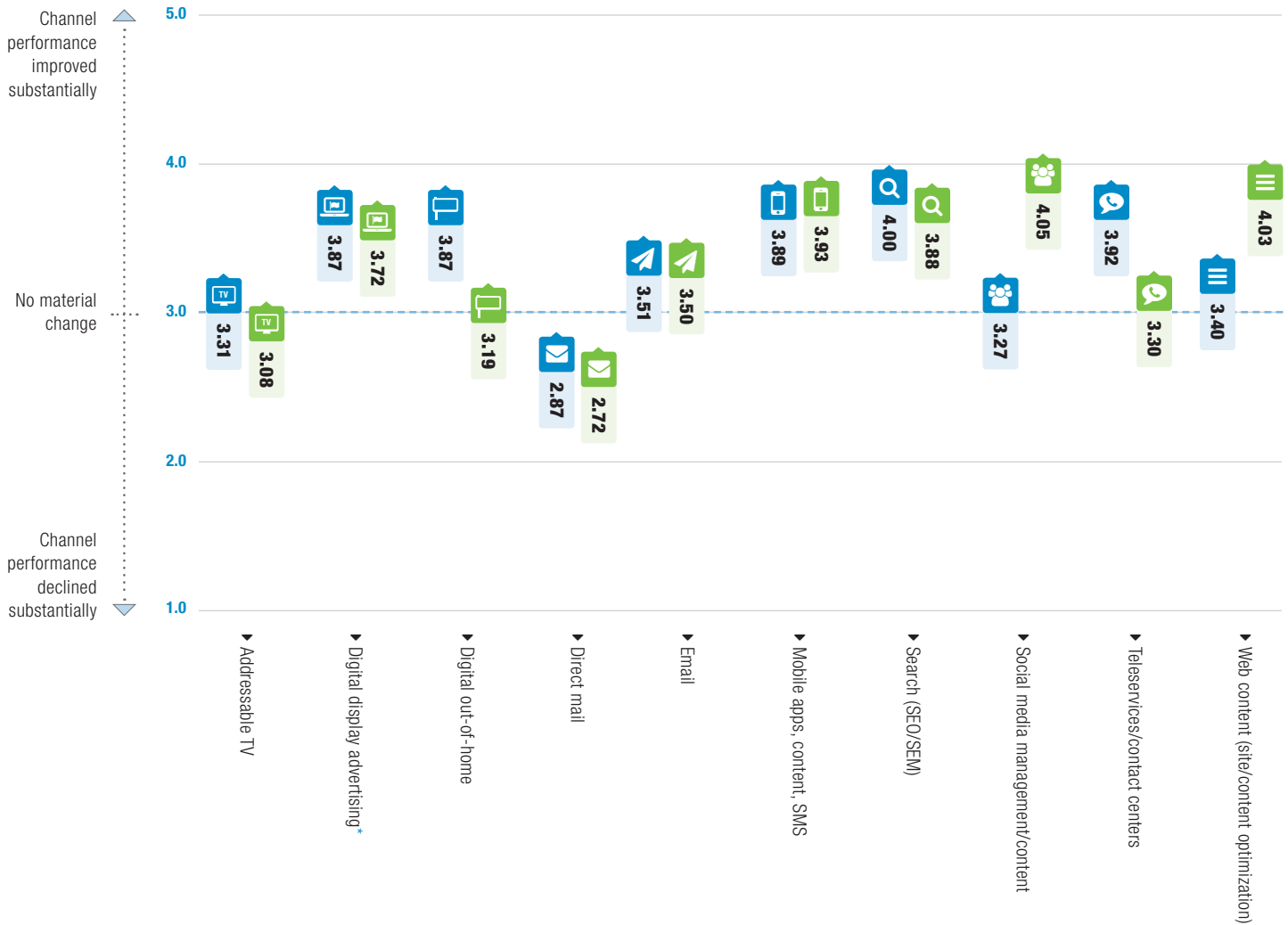


Note: Refer to page 18 of the 2015 *Global Review* for global averages

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



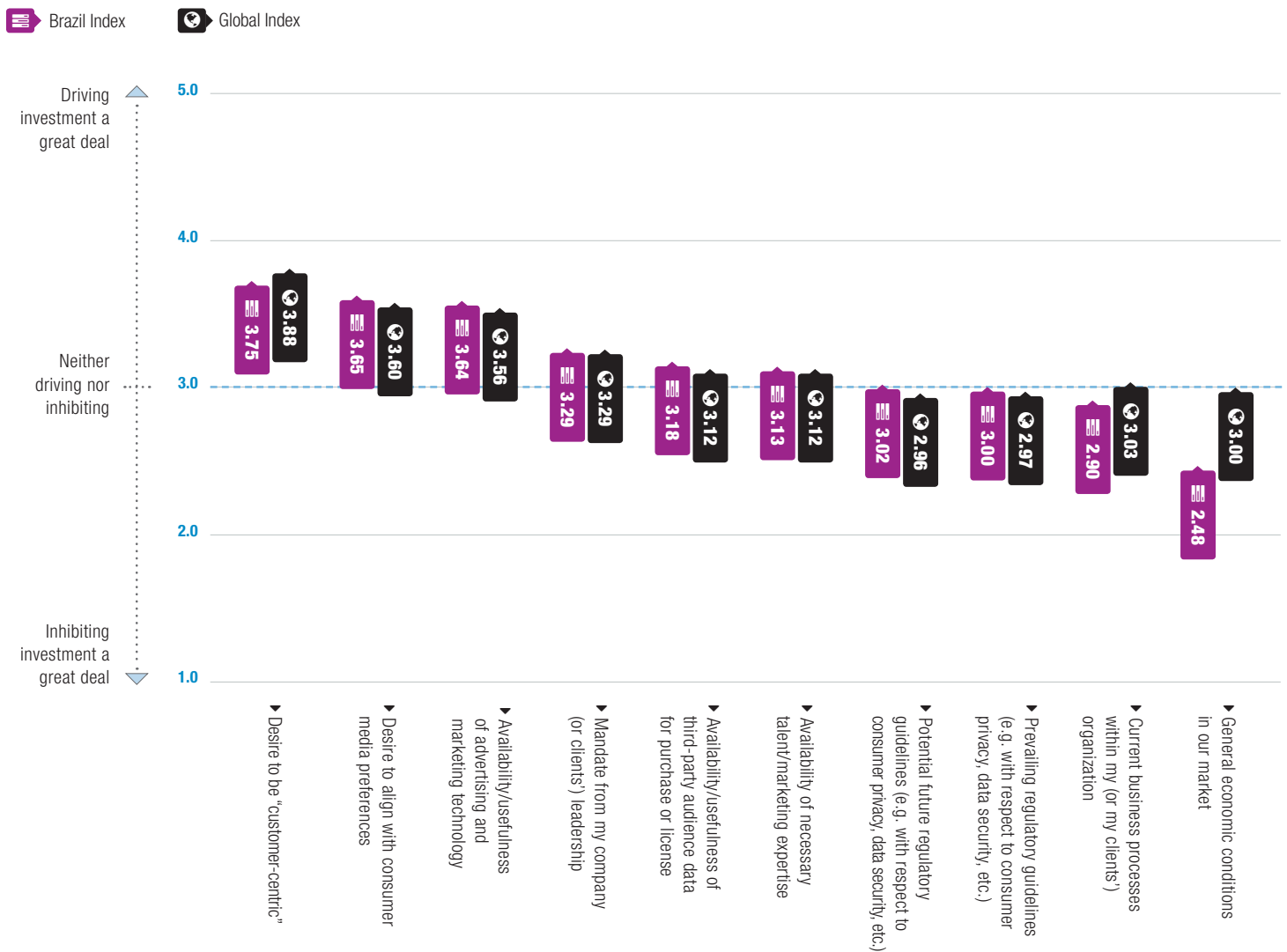
* Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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

What's driving the practice of DDMA? What's inhibiting it?

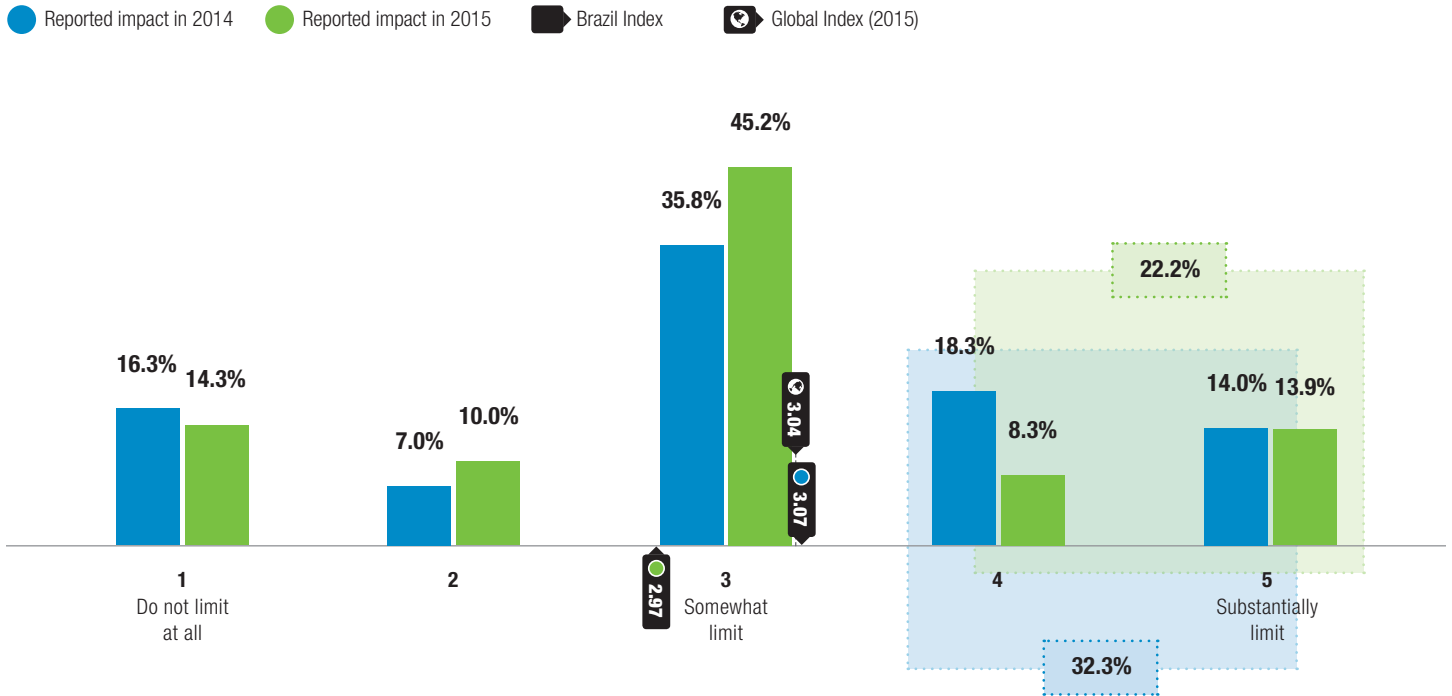
FACTORS DRIVING OR INHIBITING DDMA

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



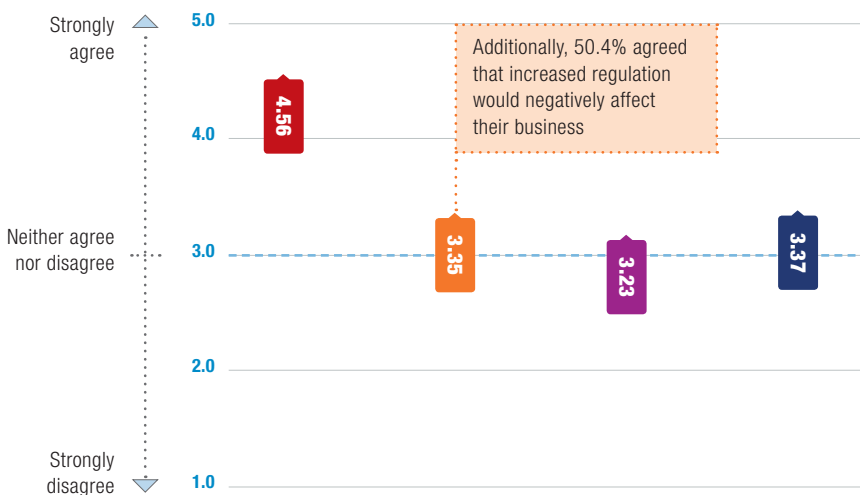
IMPACT OF REGULATION

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





Chile

PANEL:
35 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY – AUGUST 2015

* Not all respondents answered every question

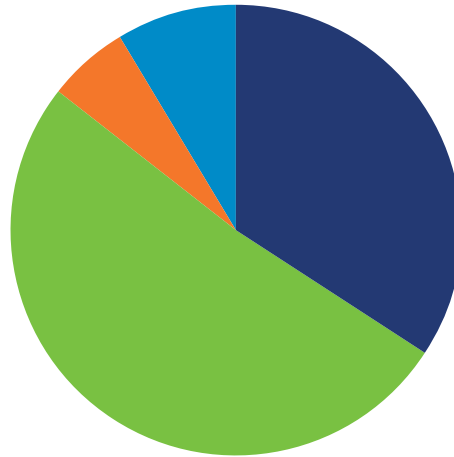
PRESENTING ASSOCIATION



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.

PANEL COMPOSITION

How would you describe your principal role/business focus?

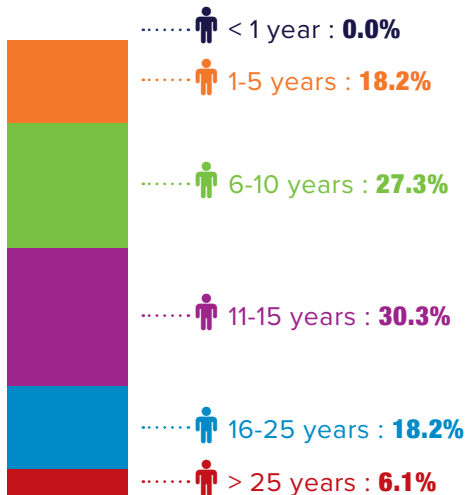


- **MARKETER/ADVERTISER : 34.3%**
- **PUBLISHER/MEDIA : 0.0%**
(focused on selling advertising)
- **PROVIDER OF MARKETING SERVICES : 51.4%**
(including data and agency services)
- **DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY : 5.7%**
- **OTHER : 8.6%**

EXPERIENCE

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

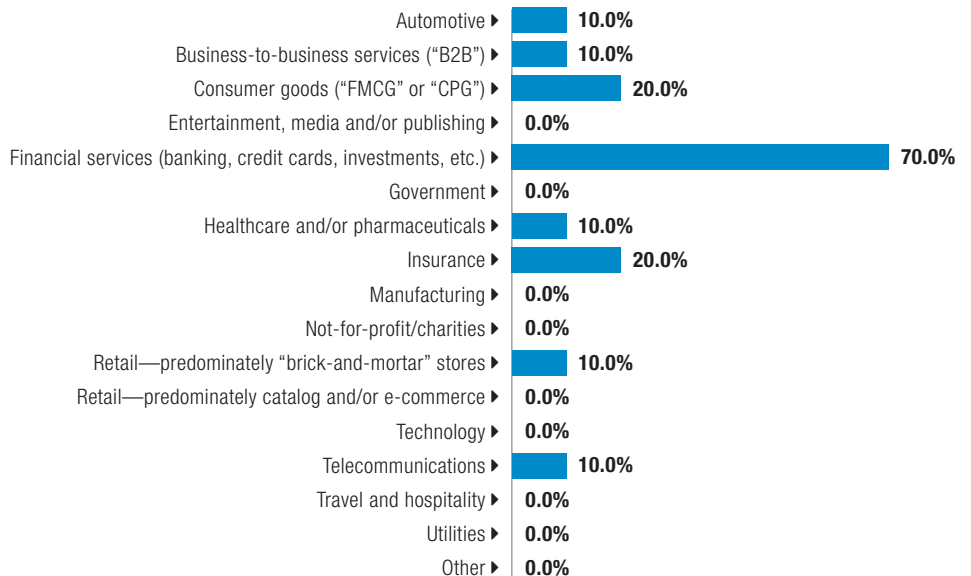
Please consider your current job and past professional roles that may apply.



INDUSTRY REPRESENTATION

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

Displaying panelists' "top three" responses

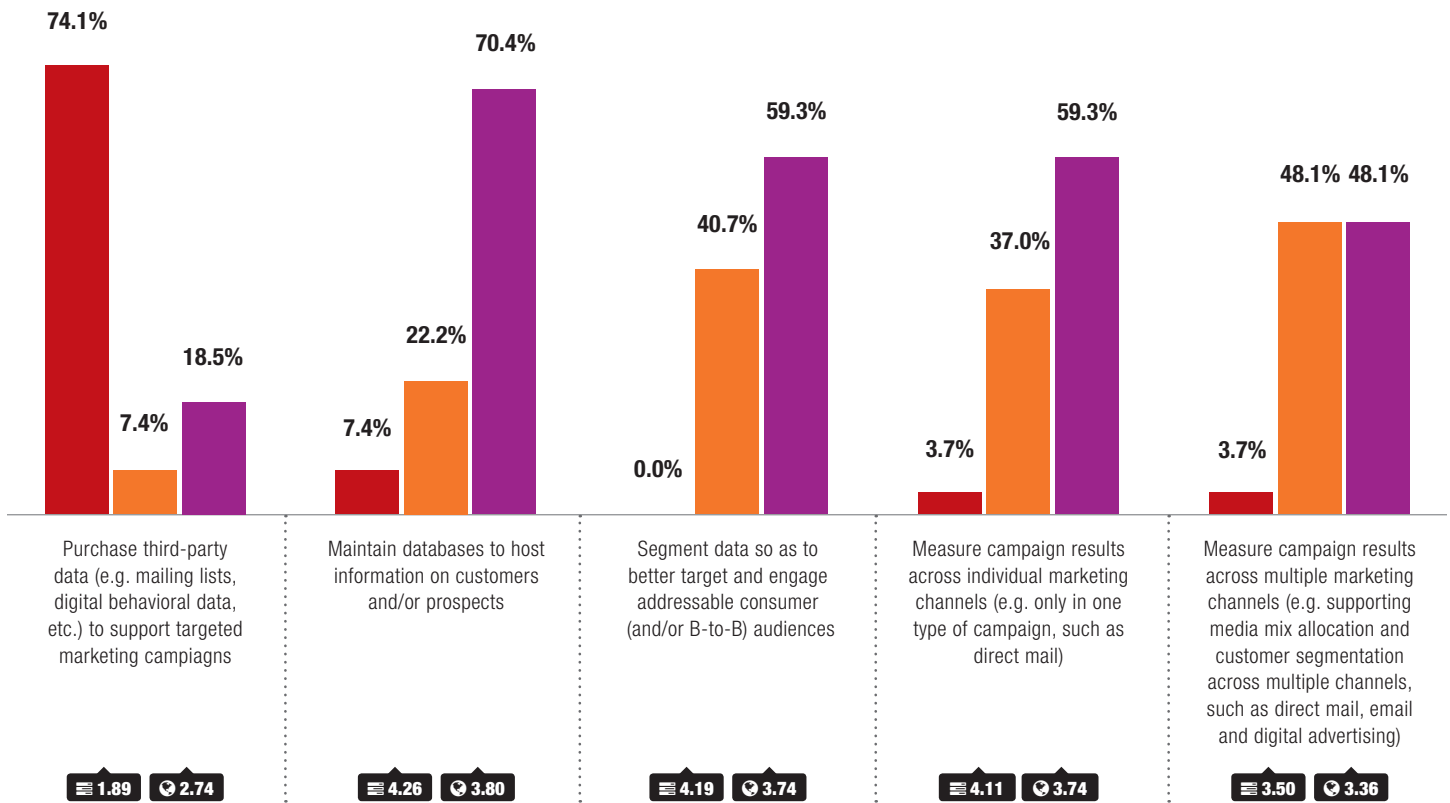


What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

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

Chile Index

Global Index

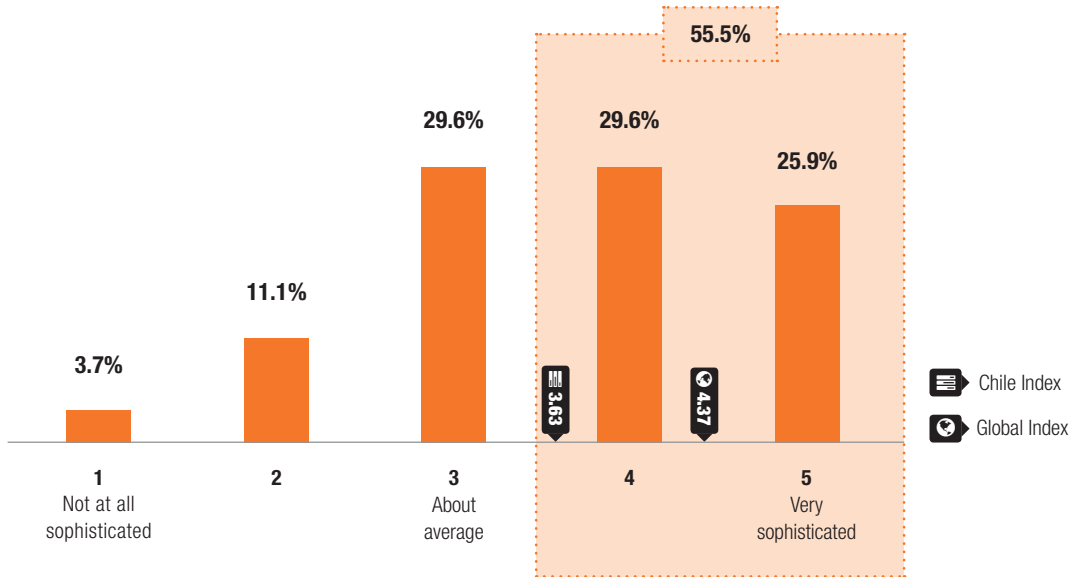
A NOTE ABOUT INDEX SCORES

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

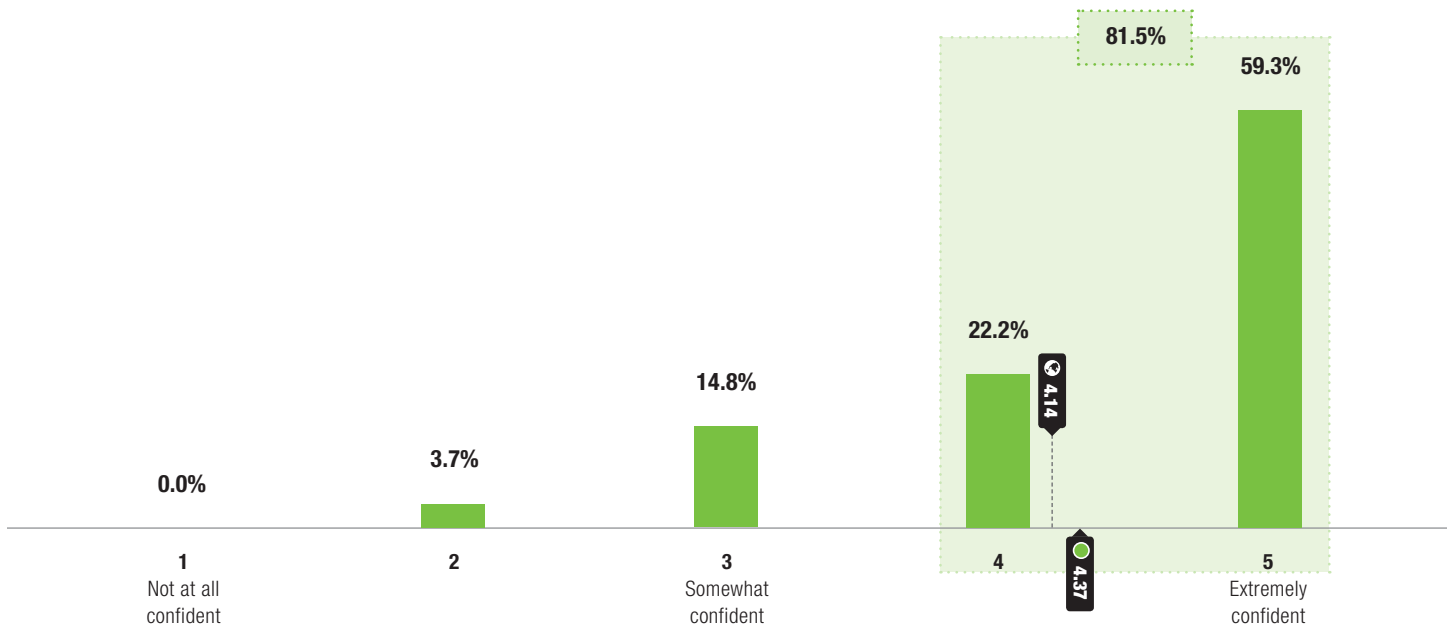
How sophisticated is your organization’s data-driven marketing and advertising (DDMA) approach?



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?

2015 Chile Index Global Index (2015)

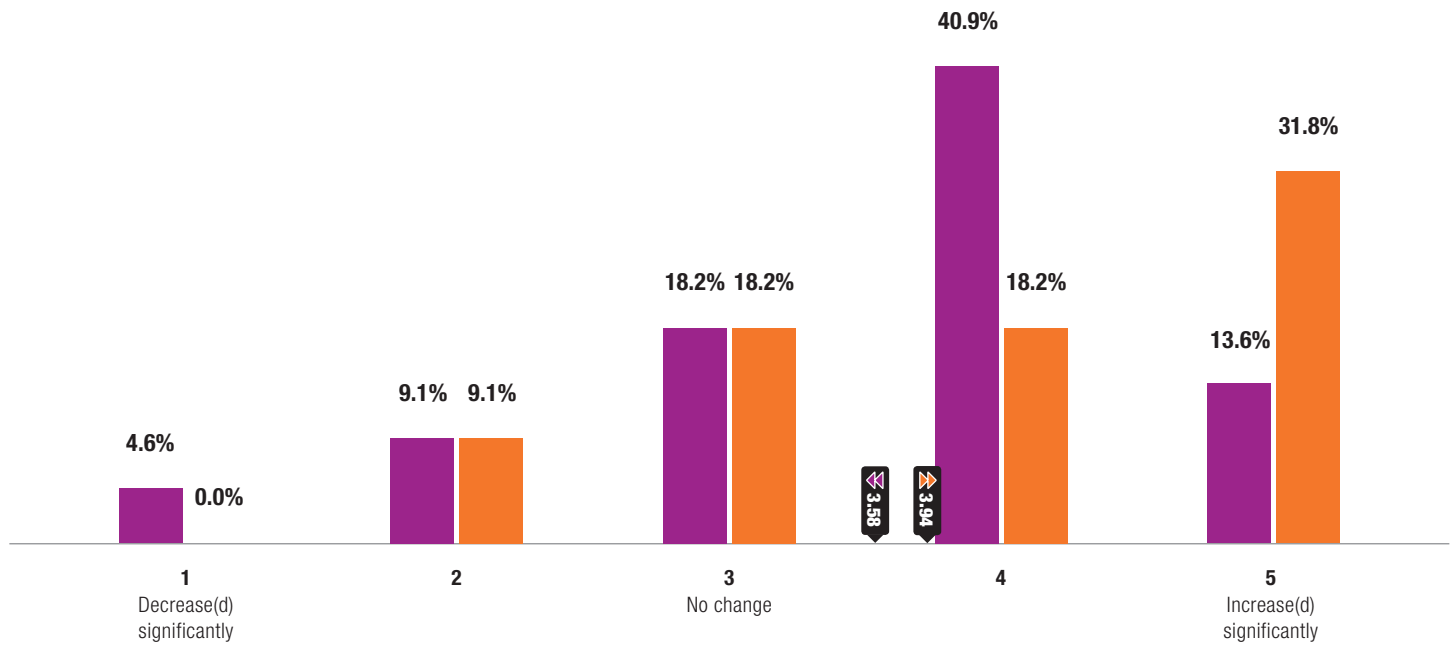


How are practitioners investing in DDMA? What returns are they generating?

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?

◀ The past year ▶ The coming year ▣ Chile 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 2015 ● Anticipated 2016 spending change



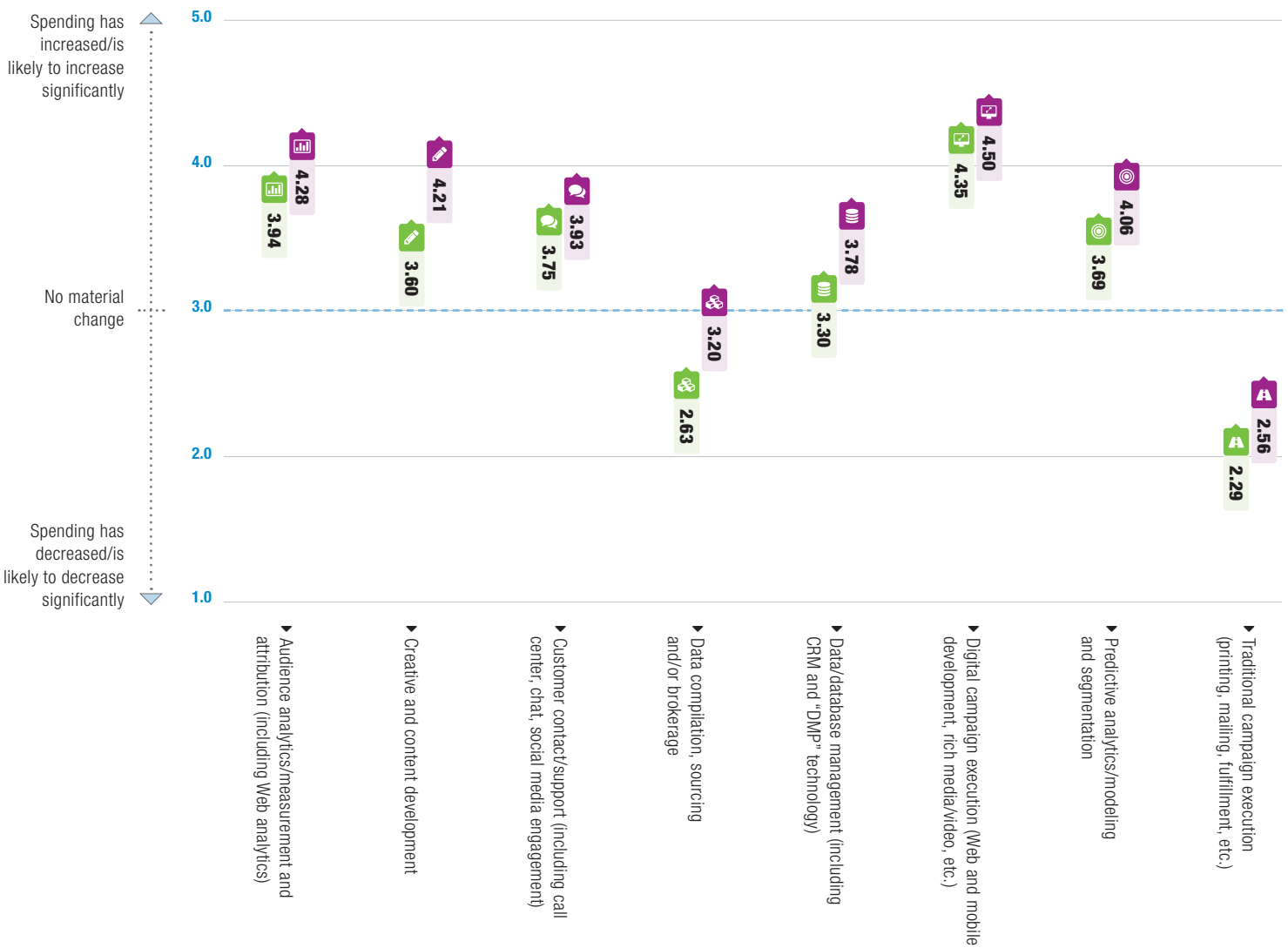
*Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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

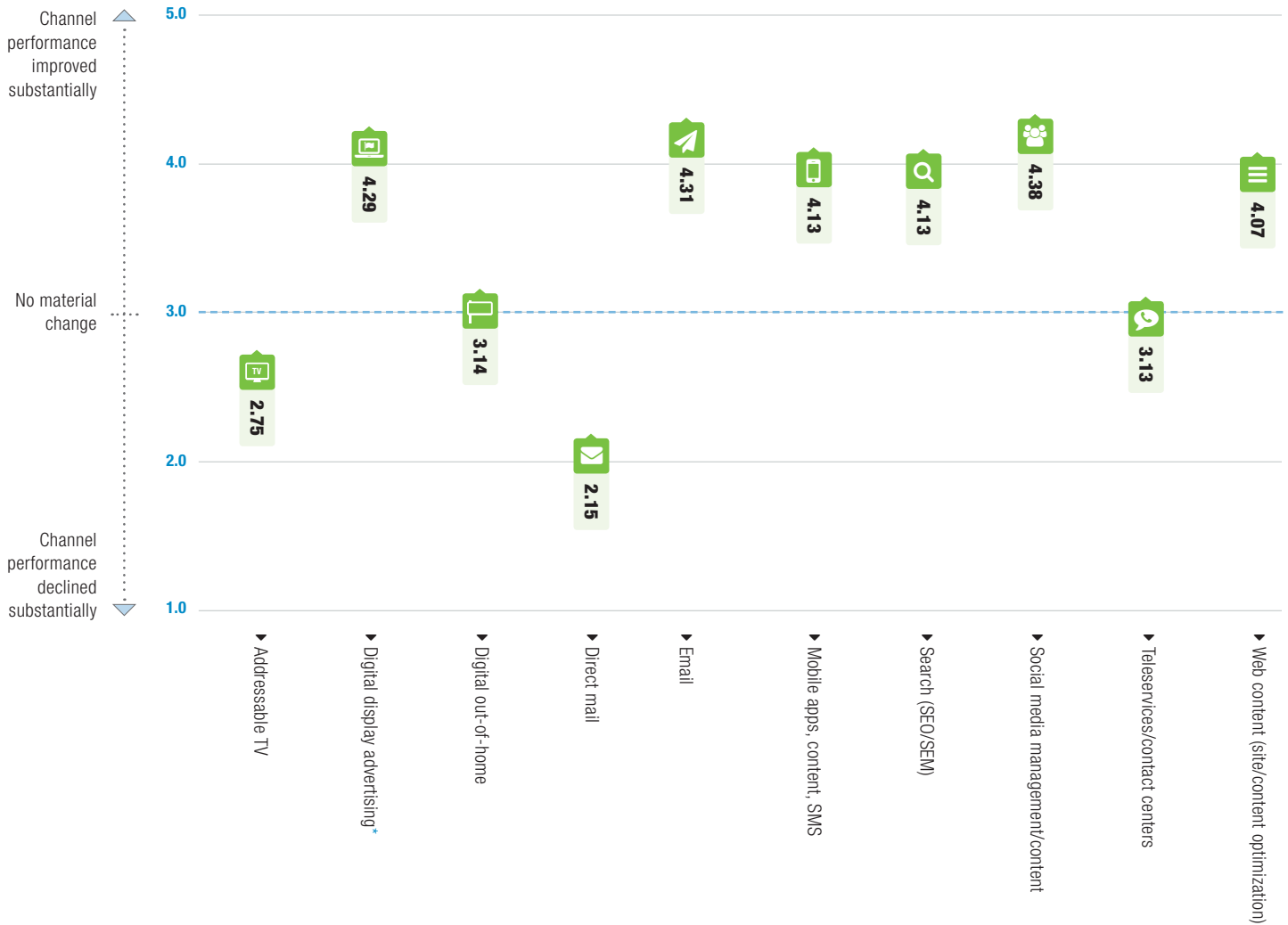


Note: Refer to page 18 of the 2015 *Global Review* for global averages

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



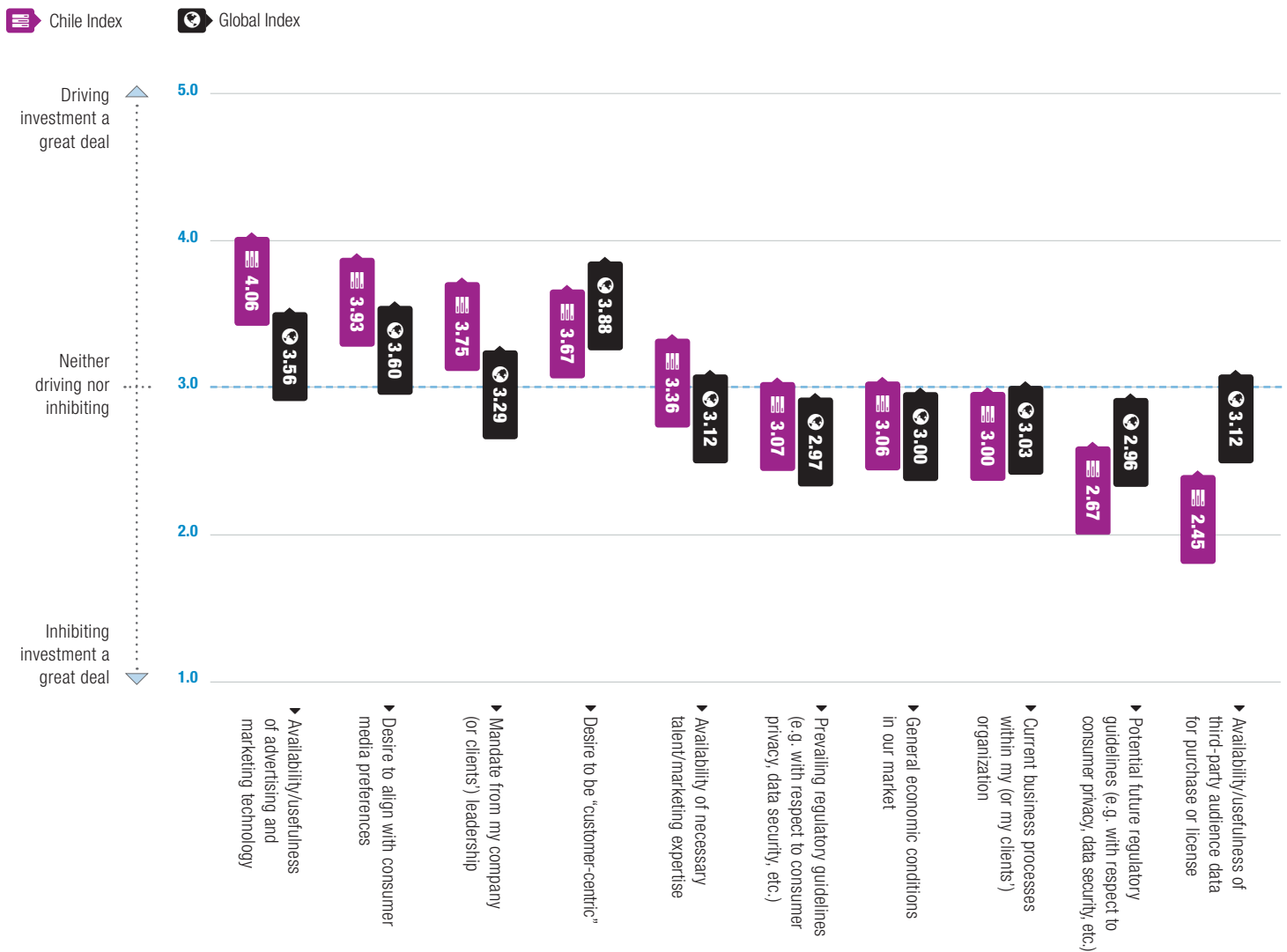
* Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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

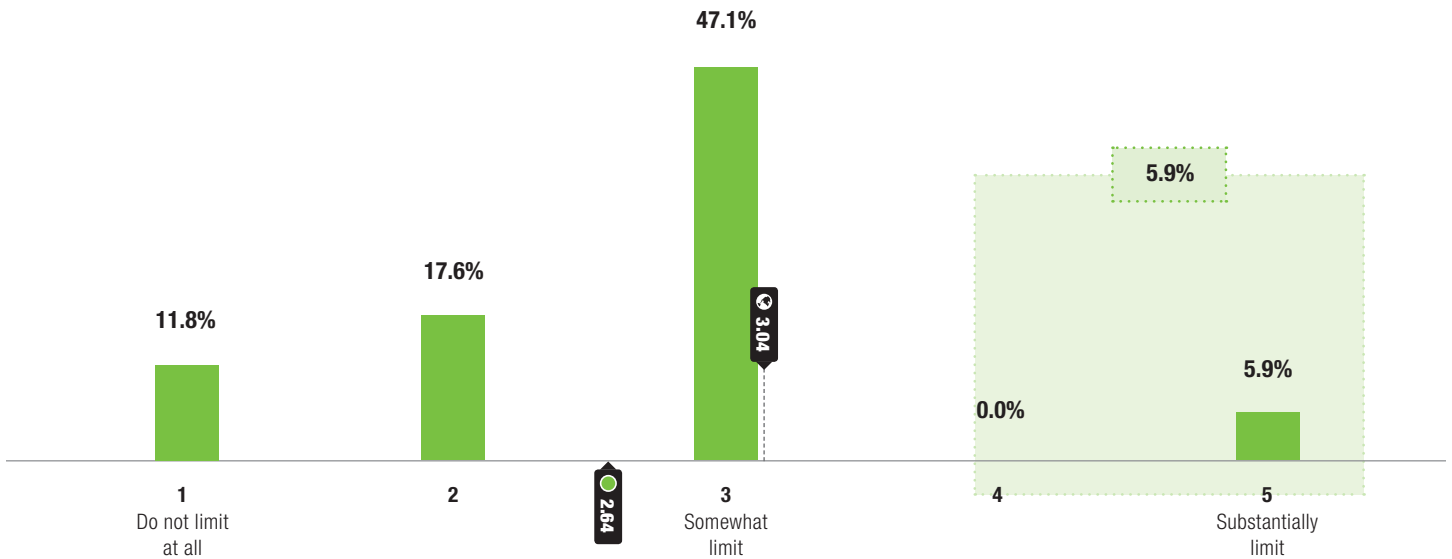
To what extent are each of the following factors driving or inhibiting your (or your clients') investment in DDMA?



IMPACT OF REGULATION

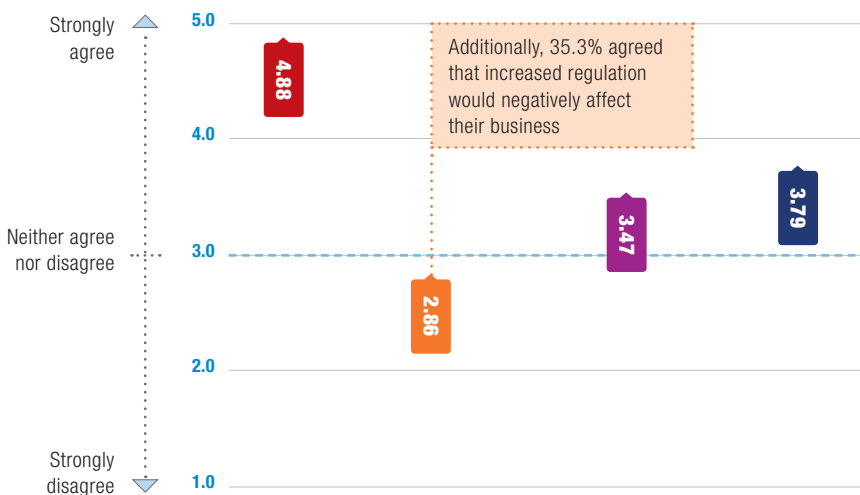
To what extent are regulatory barriers in your marketplace (e.g. limits on access to data, requirements for affirmative consumer opt-in to marketing communications, etc.) actively limiting your ability to pursue data-driven marketing and advertising initiatives?

● Reported impact in 2015 🇨🇱 Chile Index 🌐 Global Index (2015)



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?

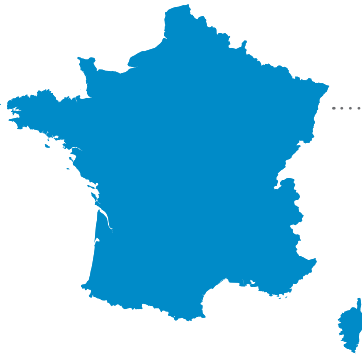
DERIVING VALUE FROM PROGRAMS

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



France





France

PANEL:
137 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY – SEPTEMBER 2015

* Not all respondents answered every question

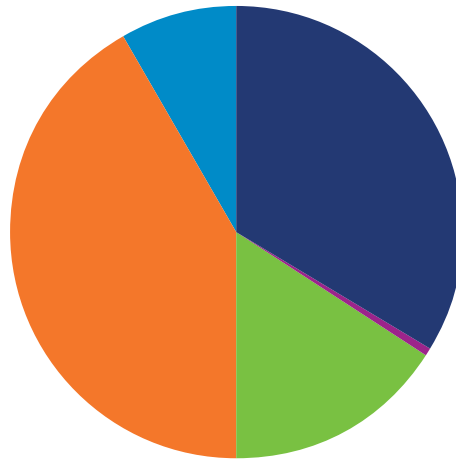
PRESENTING ASSOCIATION



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

PANEL COMPOSITION

How would you describe your principal role/business focus?

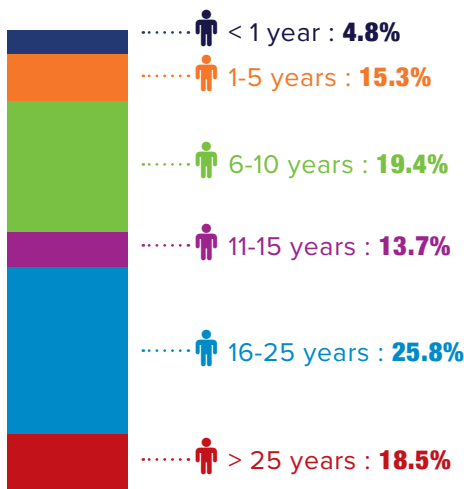


- **MARKETER/ADVERTISER : 54.0%**
- **PUBLISHER/MEDIA : 0.7%**
(focused on selling advertising)
- **PROVIDER OF MARKETING SERVICES : 25.5%**
(including data and agency services)
- **DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY : 6.6%**
- **OTHER : 13.1%**

EXPERIENCE

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

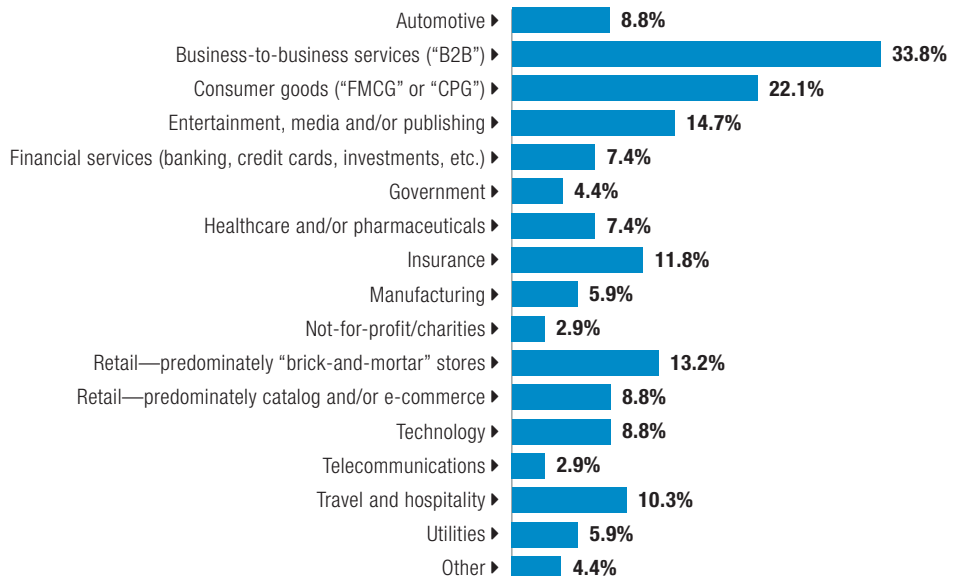
Please consider your current job and past professional roles that may apply.



INDUSTRY REPRESENTATION

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

Displaying panelists' "top three" responses

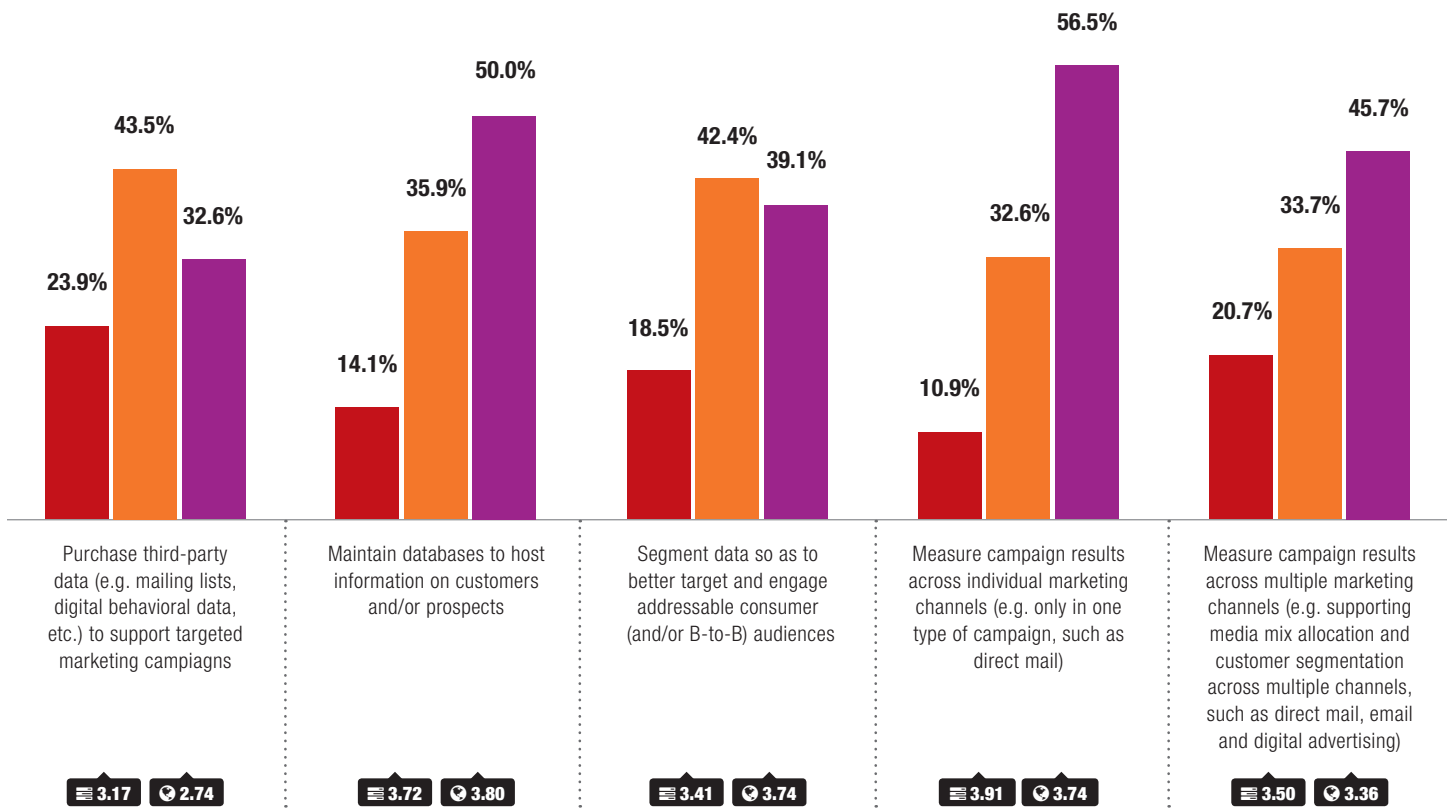


What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

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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France Index

Global Index

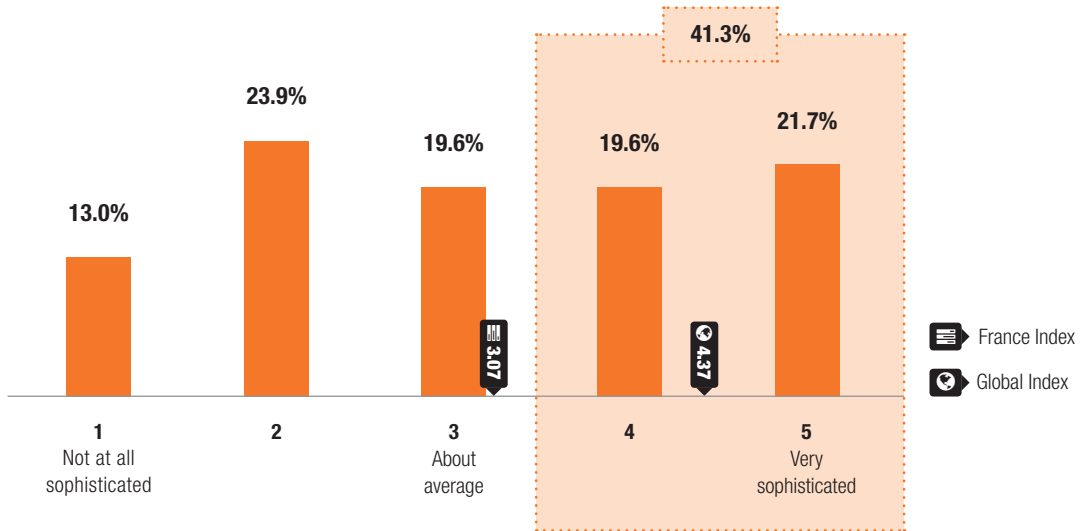
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DDMA SOPHISTICATION

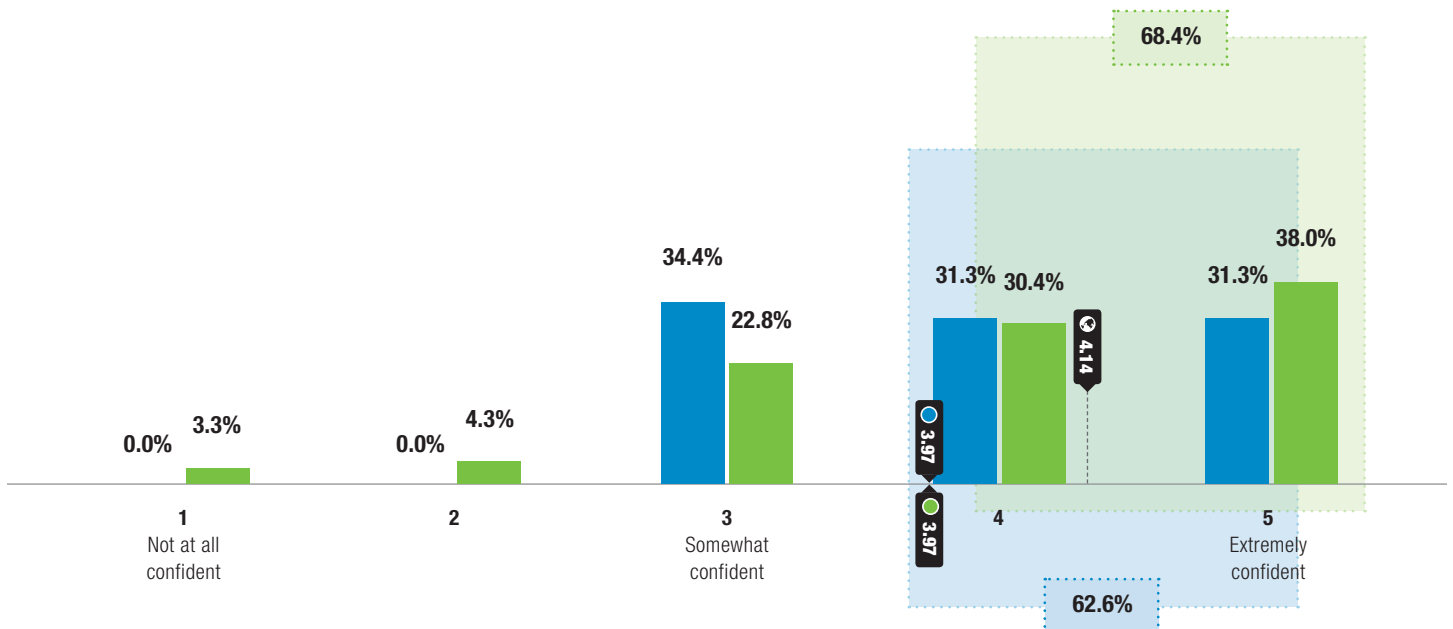
How sophisticated is your organization’s data-driven marketing and advertising (DDMA) approach?



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?

● 2014 ● 2015 France Index Global Index (2015)

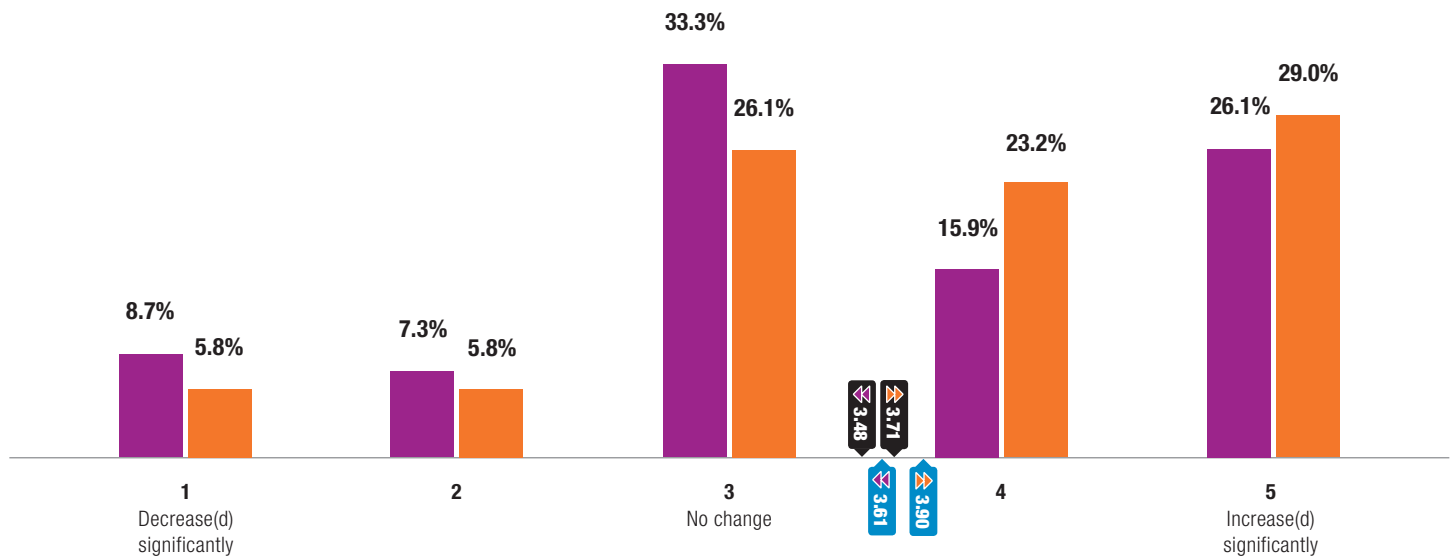


How are practitioners investing in DDMA? What returns are they generating?

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?

◀ The past year
 ▶ The coming year
 ▢ France Index (2014)
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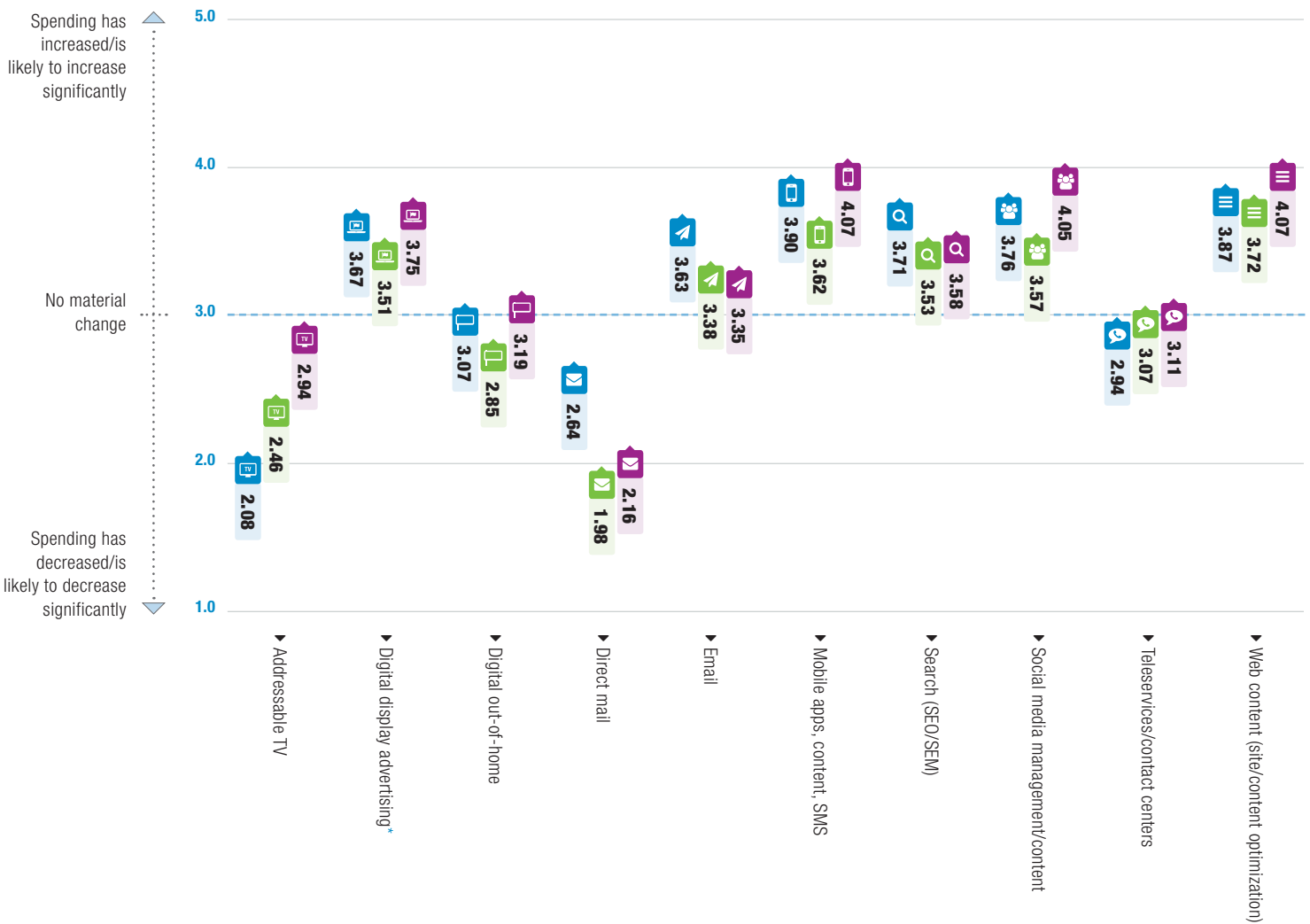


Note: Refer to page 16 of the 2015 *Global Review* for global averages

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?

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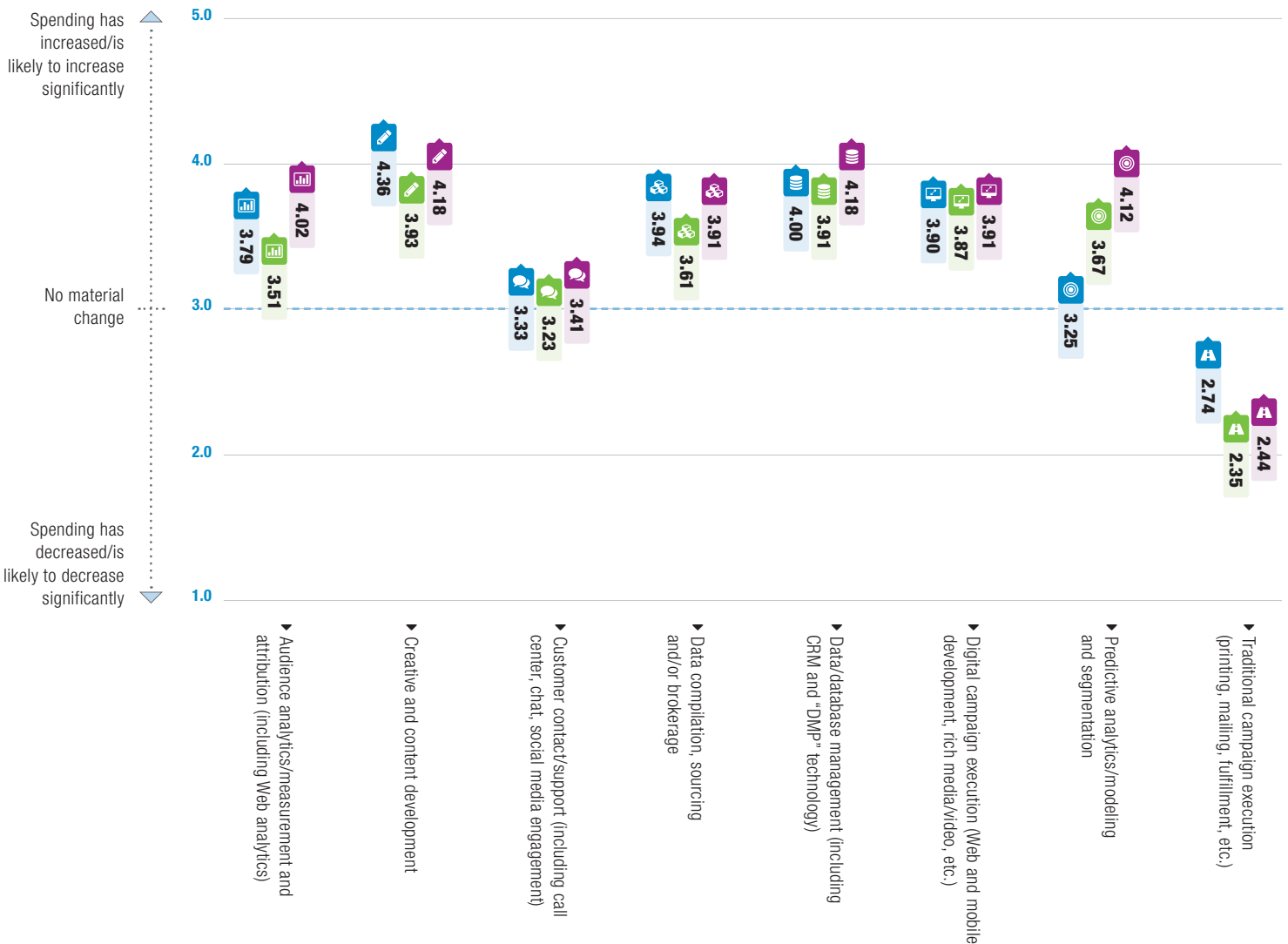
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Note: Refer to page 17 of the 2015 *Global Review* for global averages

SPENDING ON DDMA FUNCTIONS

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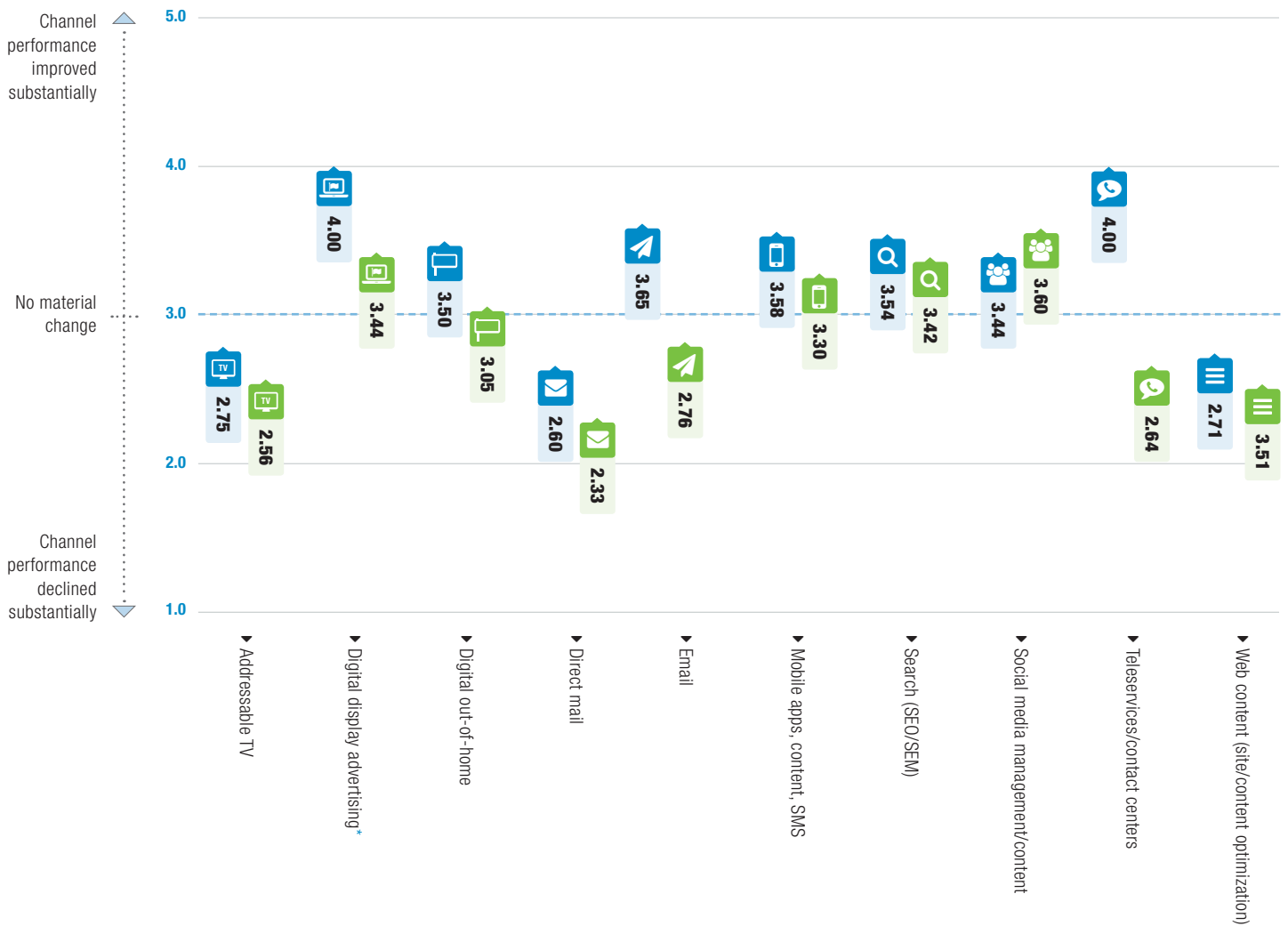


Note: Refer to page 18 of the 2015 Global Review for global averages

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



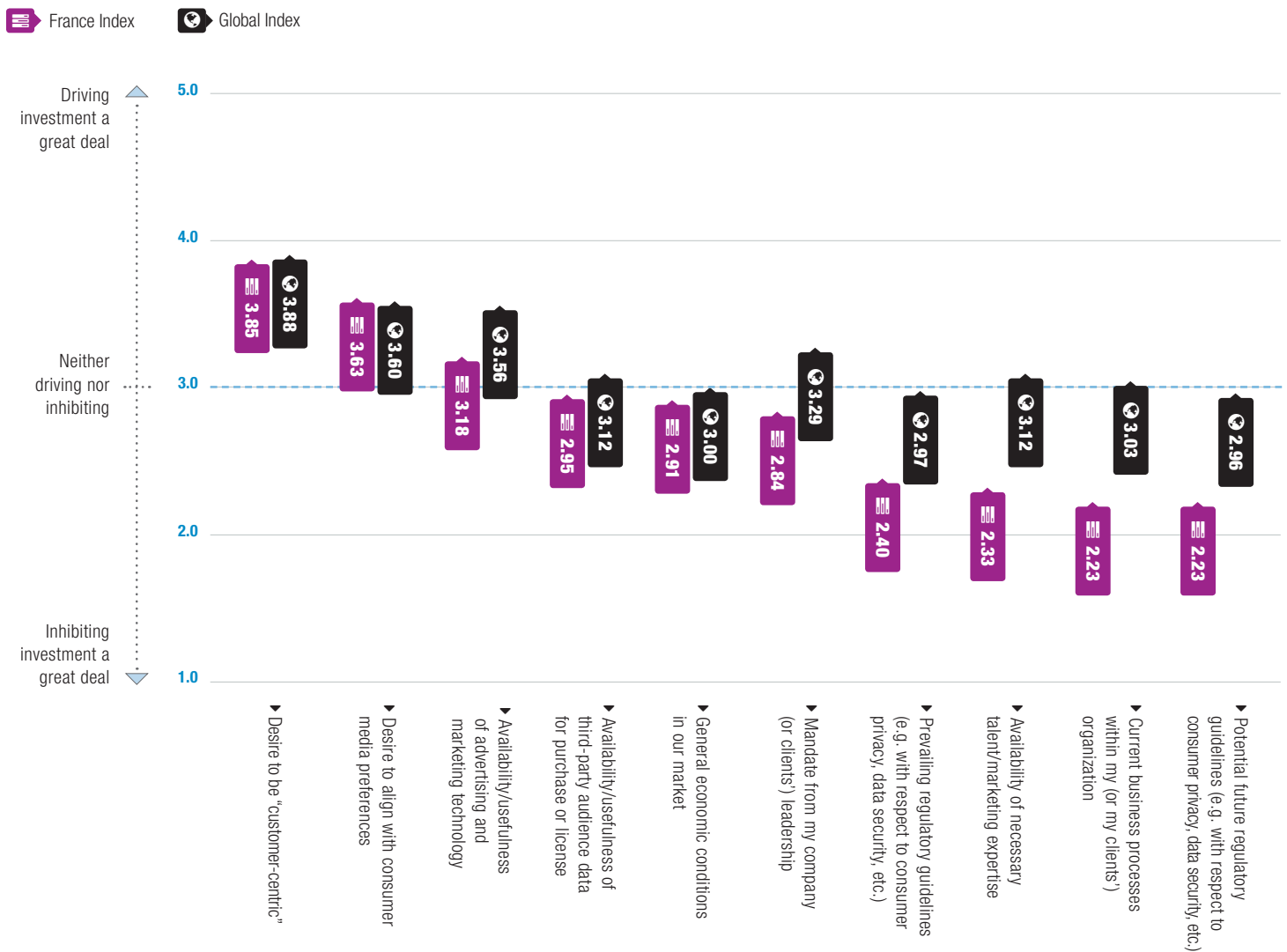
* Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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

What's driving the practice of DDMA? What's inhibiting it?

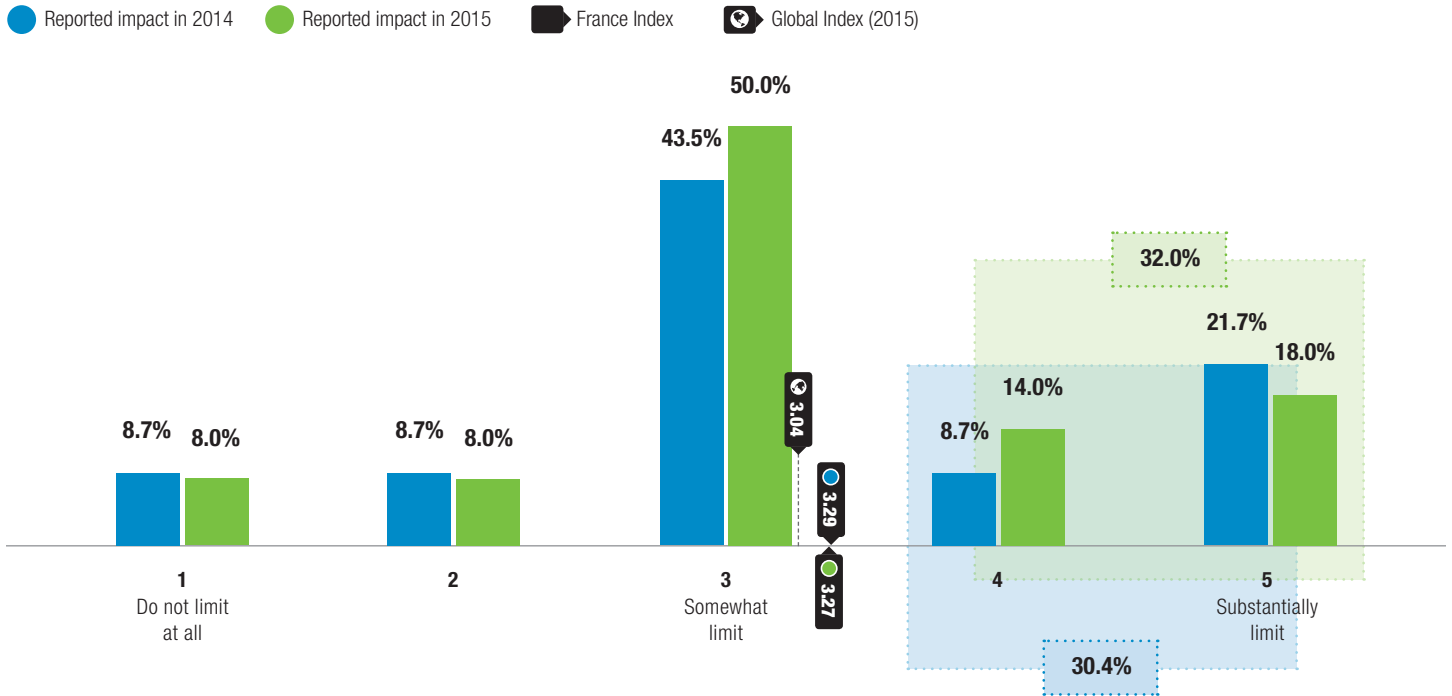
FACTORS DRIVING OR INHIBITING DDMA

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



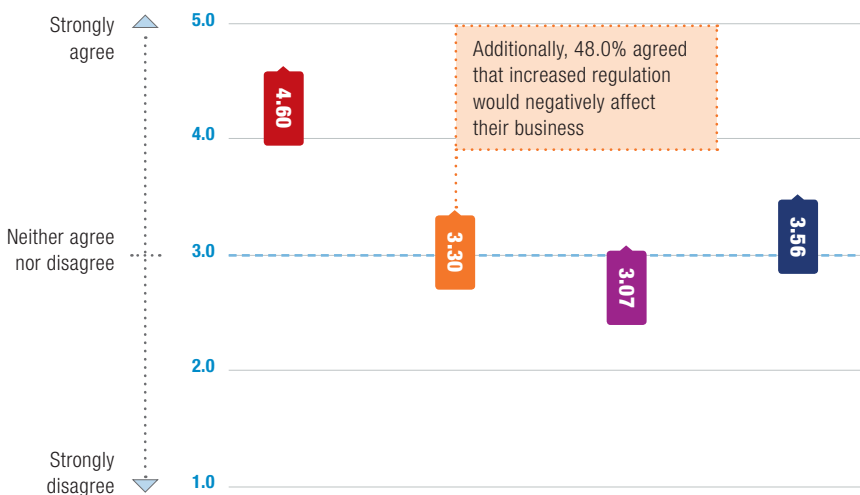
IMPACT OF REGULATION

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?



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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?



Germany





Germany

PANEL:
291 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY – AUGUST 2015

* Not all respondents answered every question

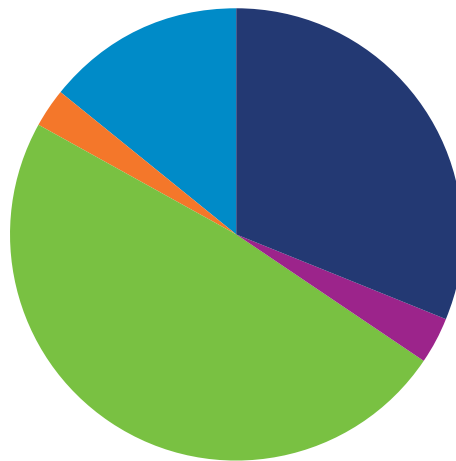
PRESENTING ASSOCIATION

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



PANEL COMPOSITION

How would you describe your principal role/business focus?

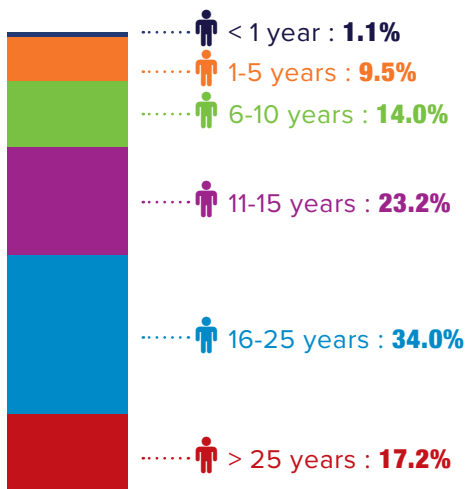


- **MARKETER/ADVERTISER : 31.3%**
- **PUBLISHER/MEDIA : 3.4%**
(focused on selling advertising)
- **PROVIDER OF MARKETING SERVICES : 48.5%**
(including data and agency services)
- **DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY : 2.7%**
- **OTHER : 14.1%**

EXPERIENCE

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

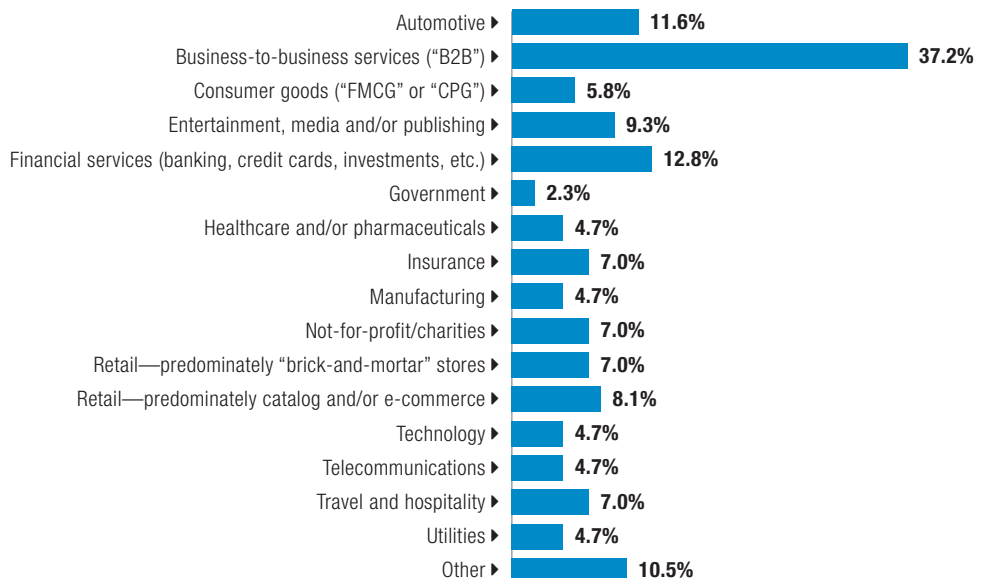
Please consider your current job and past professional roles that may apply.



INDUSTRY REPRESENTATION

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

Displaying panelists' "top three" responses

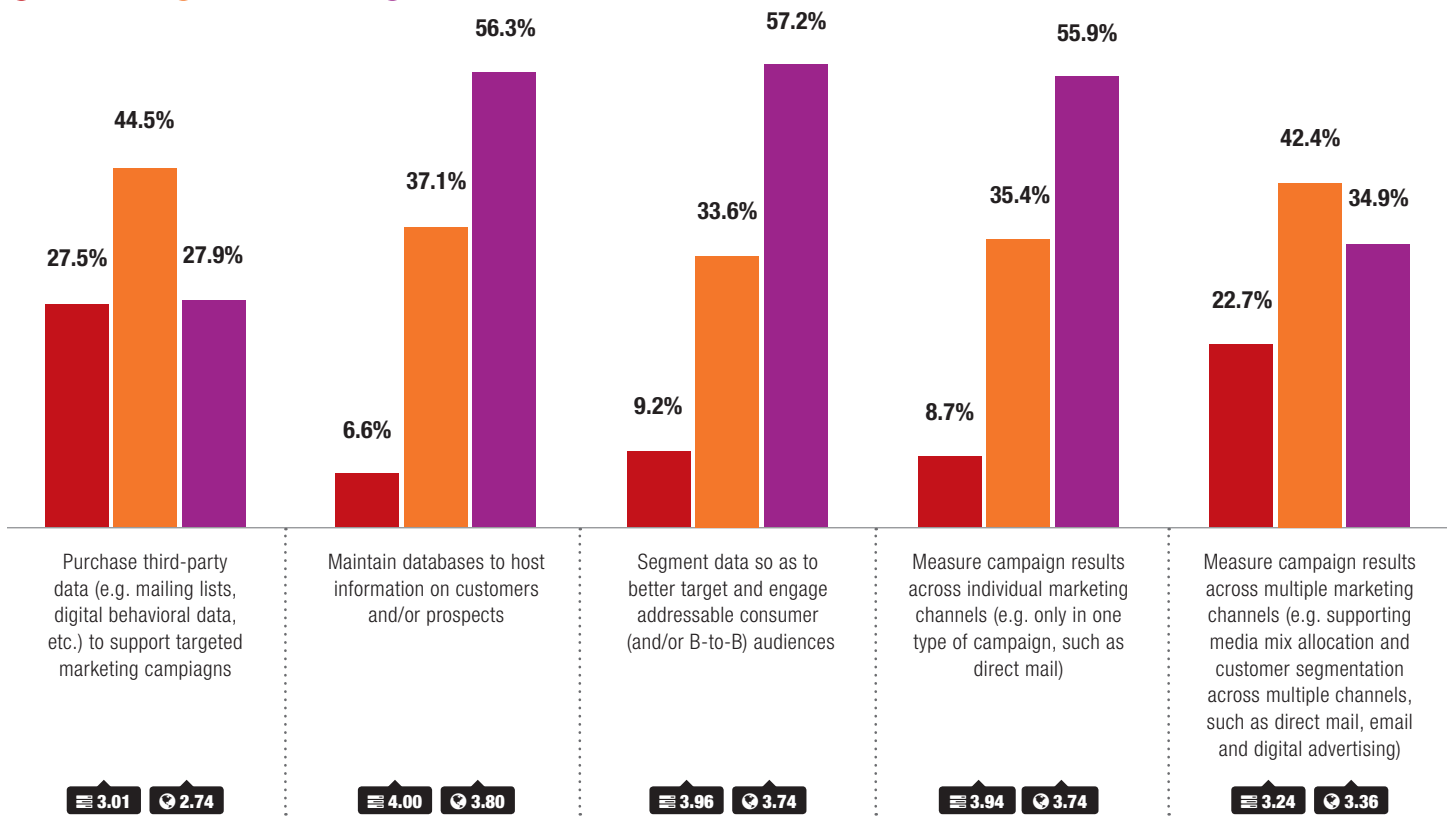


What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

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

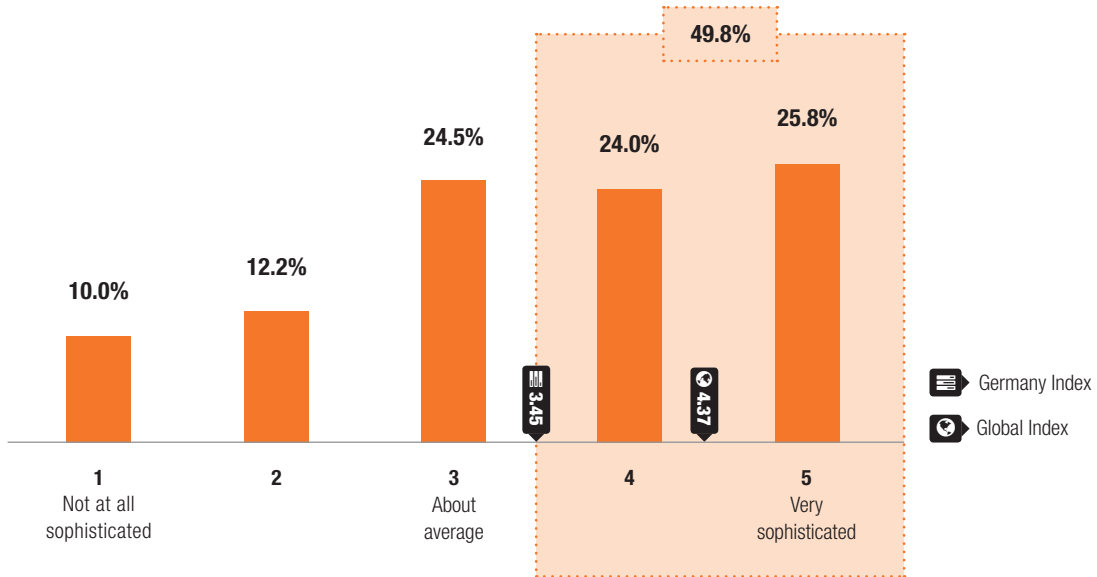
A NOTE ABOUT INDEX SCORES

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DDMA SOPHISTICATION

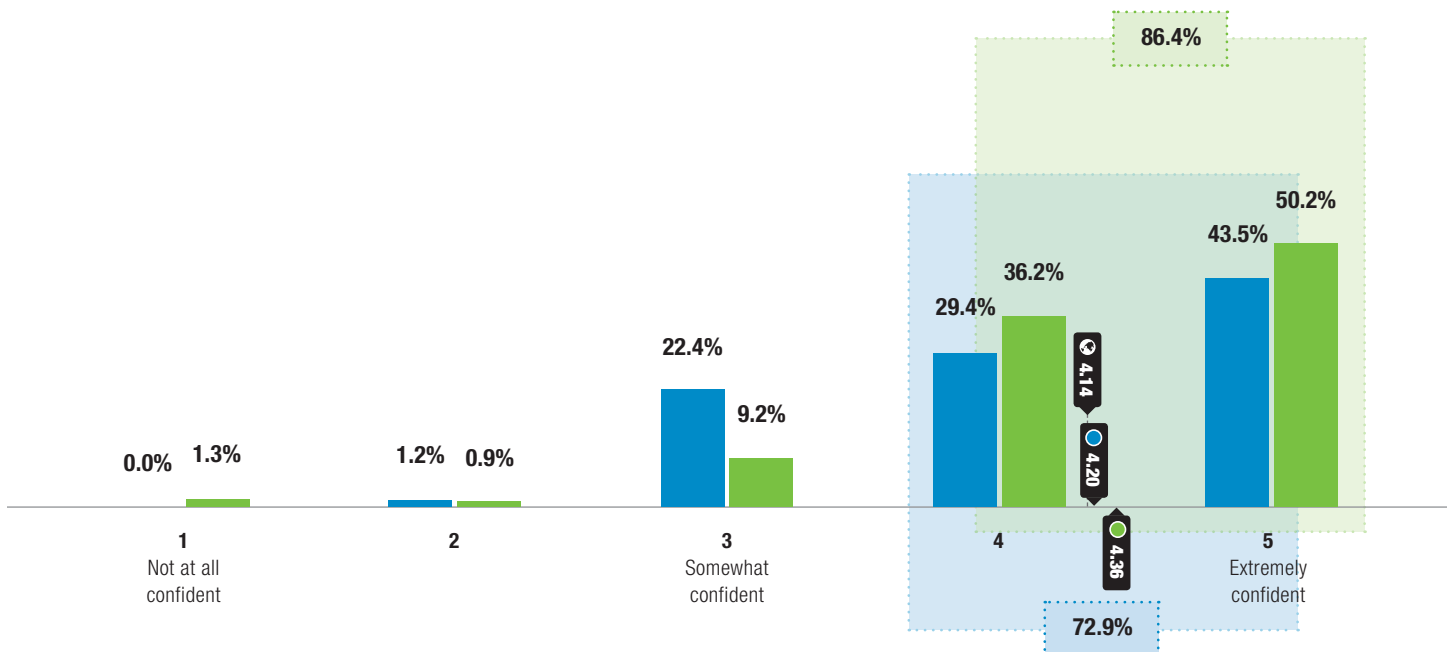
How sophisticated is your organization's data-driven marketing and advertising (DDMA) approach?



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?

● 2014 ● 2015 ■ Germany Index ■ Global Index (2015)

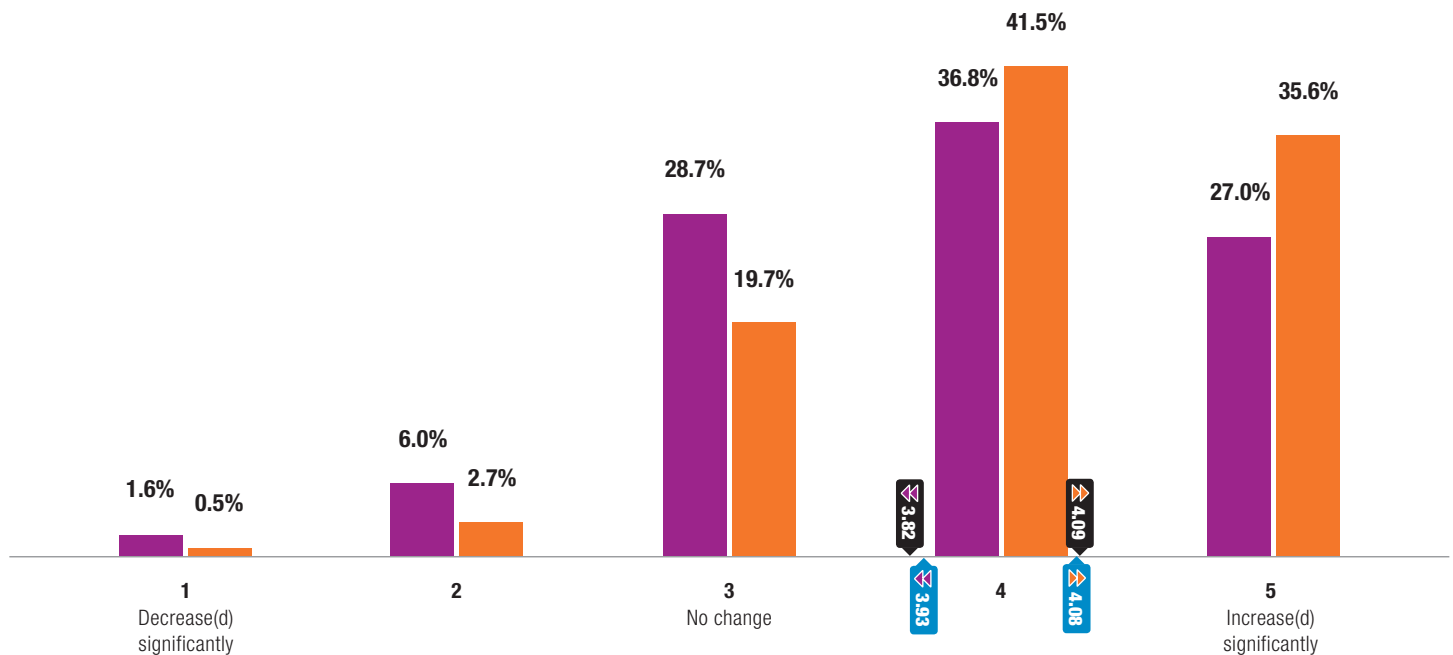


How are practitioners investing in DDMA? What returns are they generating?

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?

◀ The past year
 ▶ The coming year
 ◀ Germany Index (2014)
 ◀ Germany Index (2015)

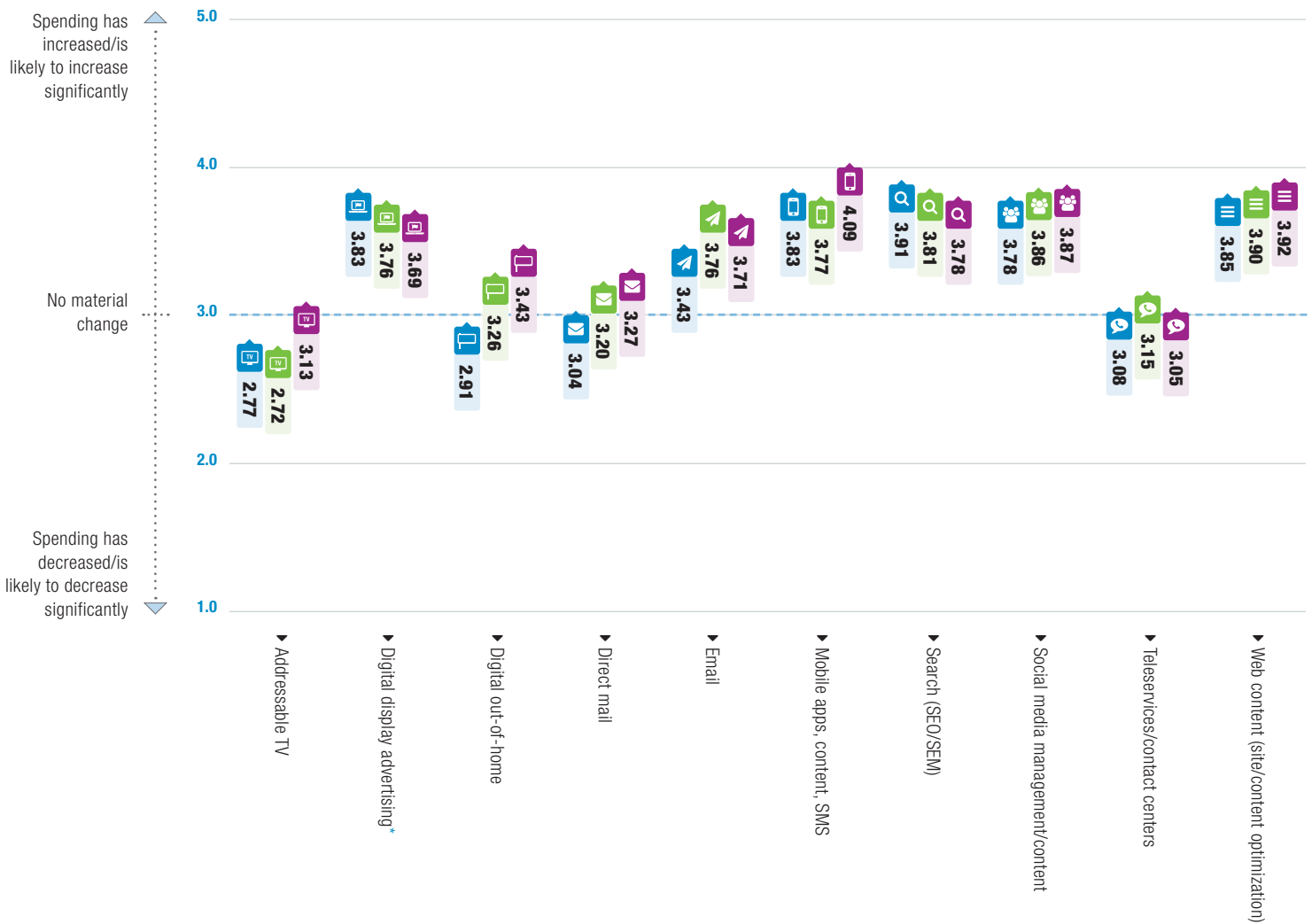


Note: Refer to page 16 of the 2015 *Global Review* for global averages

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



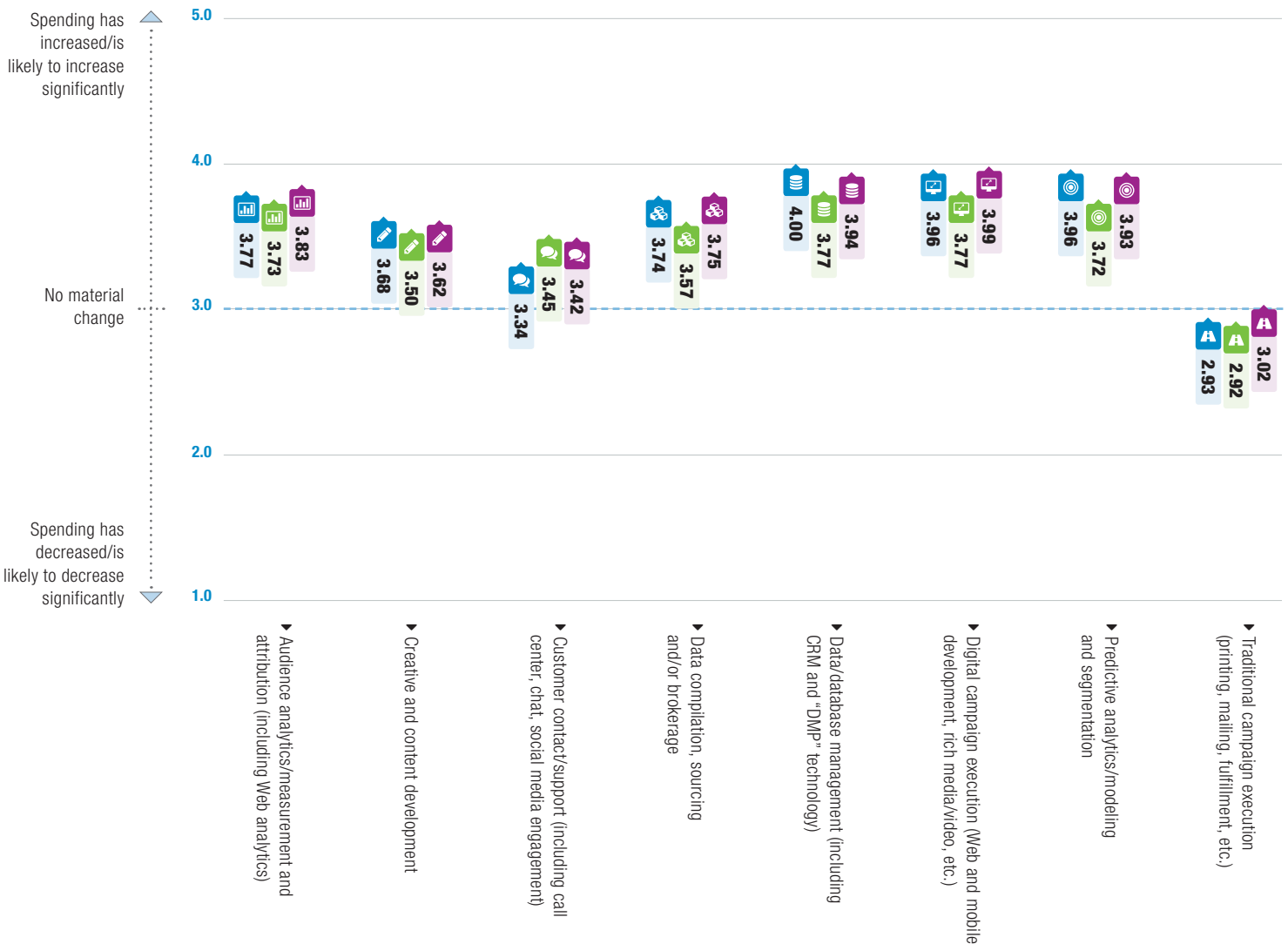
*Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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



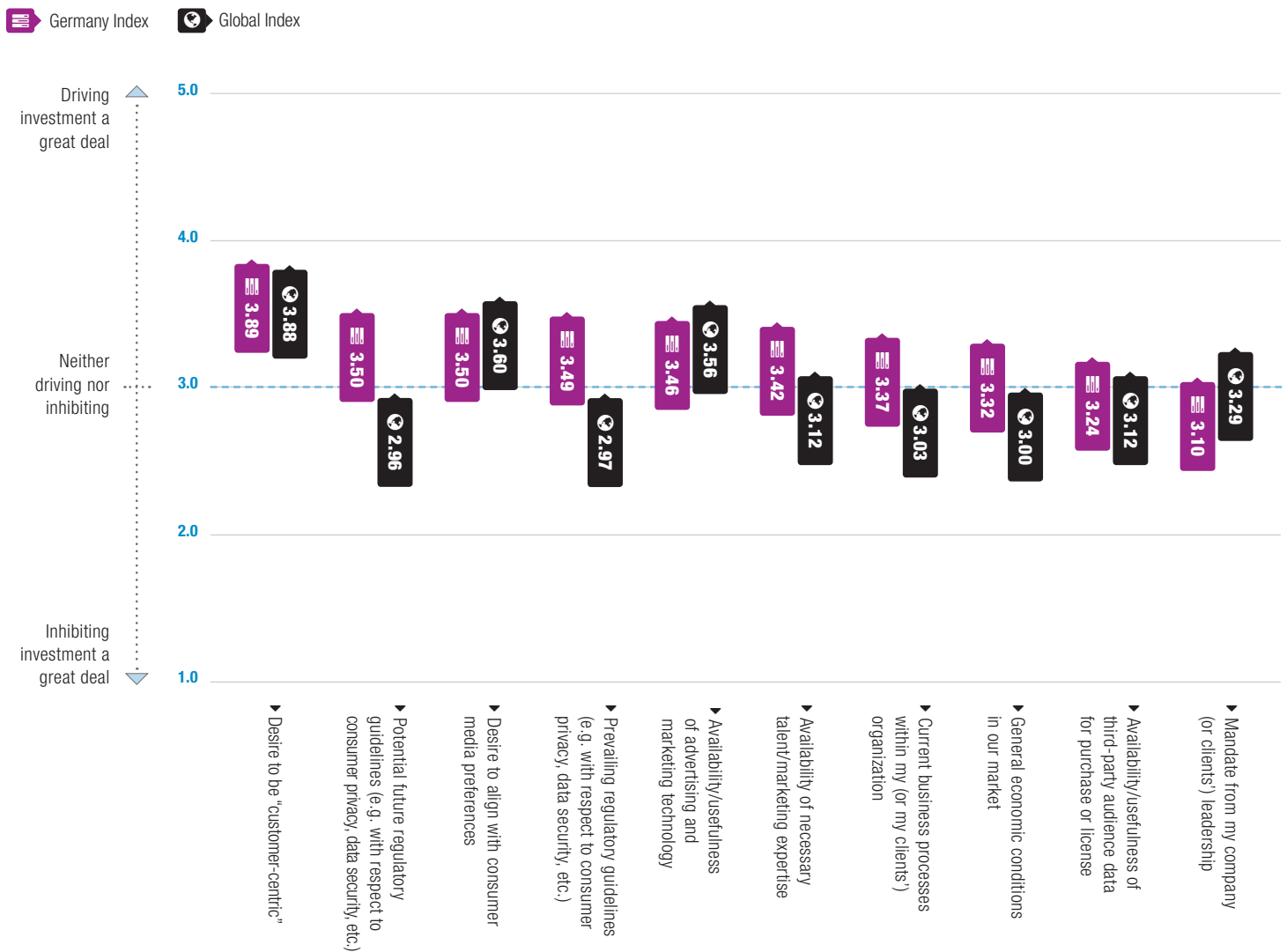
* Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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

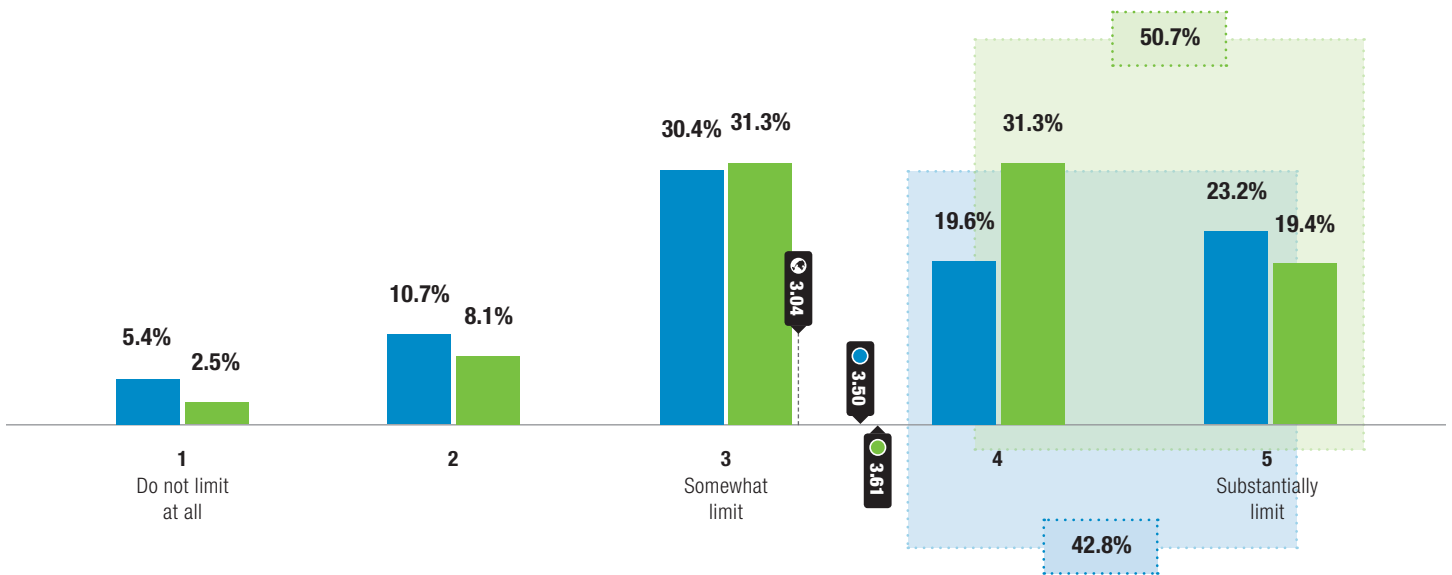
To what extent are each of the following factors driving or inhibiting your (or your clients') investment in DDMA?



IMPACT OF REGULATION

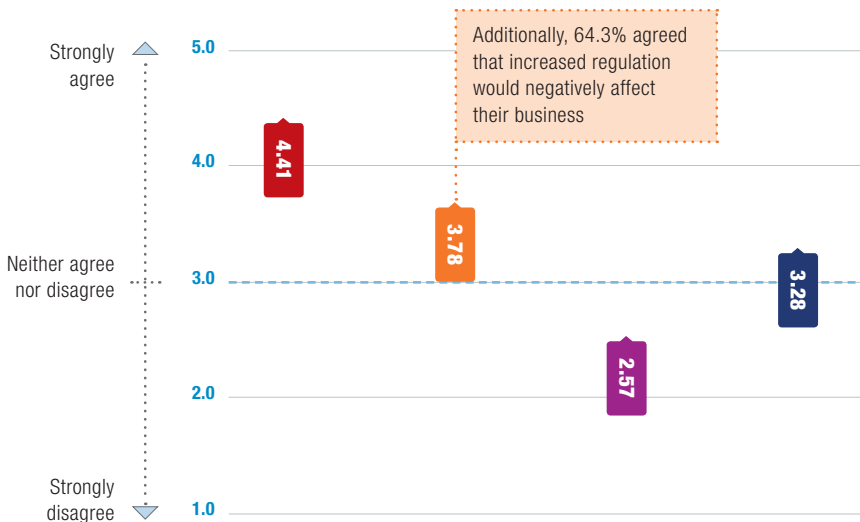
To what extent are regulatory barriers in your marketplace (e.g. limits on access to data, requirements for affirmative consumer opt-in to marketing communications, etc.) actively limiting your ability to pursue data-driven marketing and advertising initiatives?

● Reported impact in 2014 ● Reported impact in 2015 🇩🇪 Germany Index 🌐 Global Index (2015)



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



Hong Kong

PANEL:
25 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY – AUGUST 2015

* Not all respondents answered every question

PRESENTING ASSOCIATION

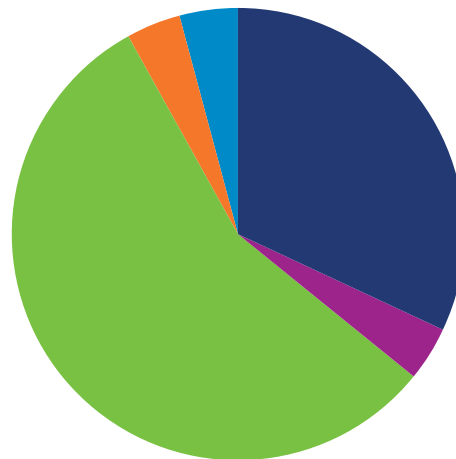
The Digital + Direct Marketing Association Asia [D+D] promotes

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.



PANEL COMPOSITION

How would you describe your principal role/business focus?

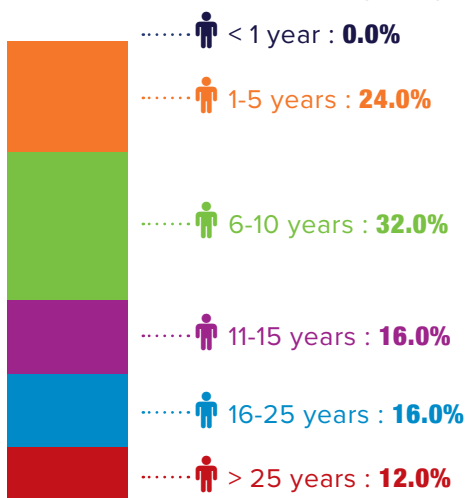


- **MARKETER/ADVERTISER : 32.0%**
- **PUBLISHER/MEDIA : 4.0%**
(focused on selling advertising)
- **PROVIDER OF MARKETING SERVICES : 56.0%**
(including data and agency services)
- **DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY : 4.0%**
- **OTHER : 4.0%**

EXPERIENCE

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

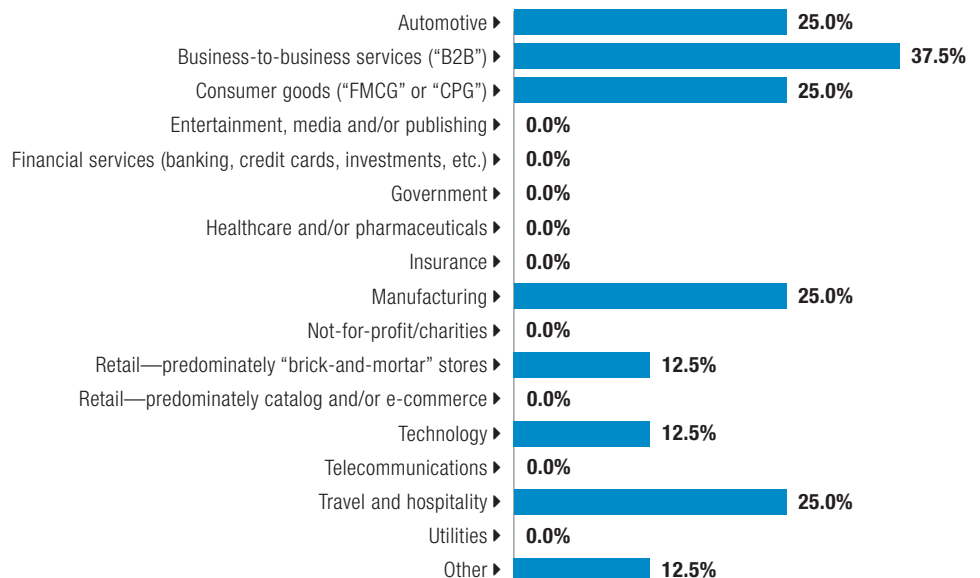
Please consider your current job and past professional roles that may apply.



INDUSTRY REPRESENTATION

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

Displaying panelists' "top three" responses

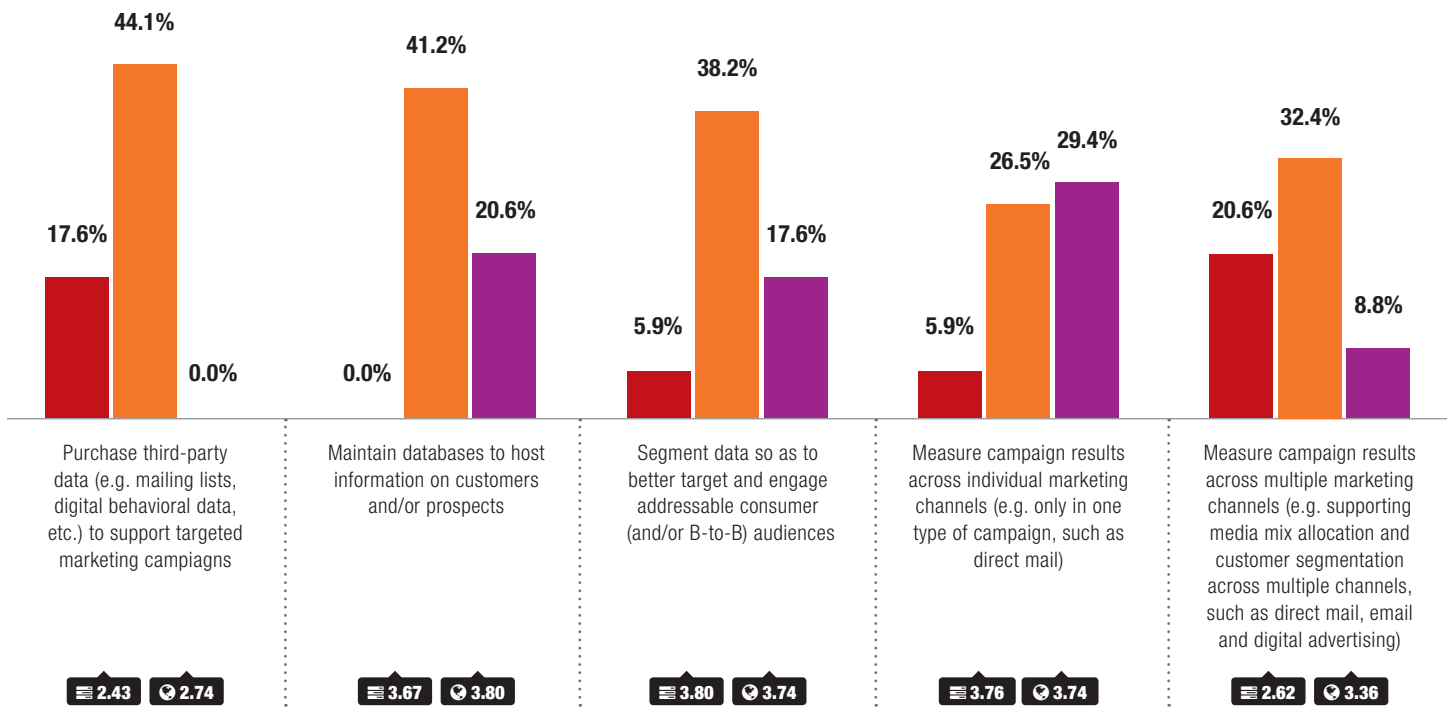


What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

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

Hong Kong Index

Global Index

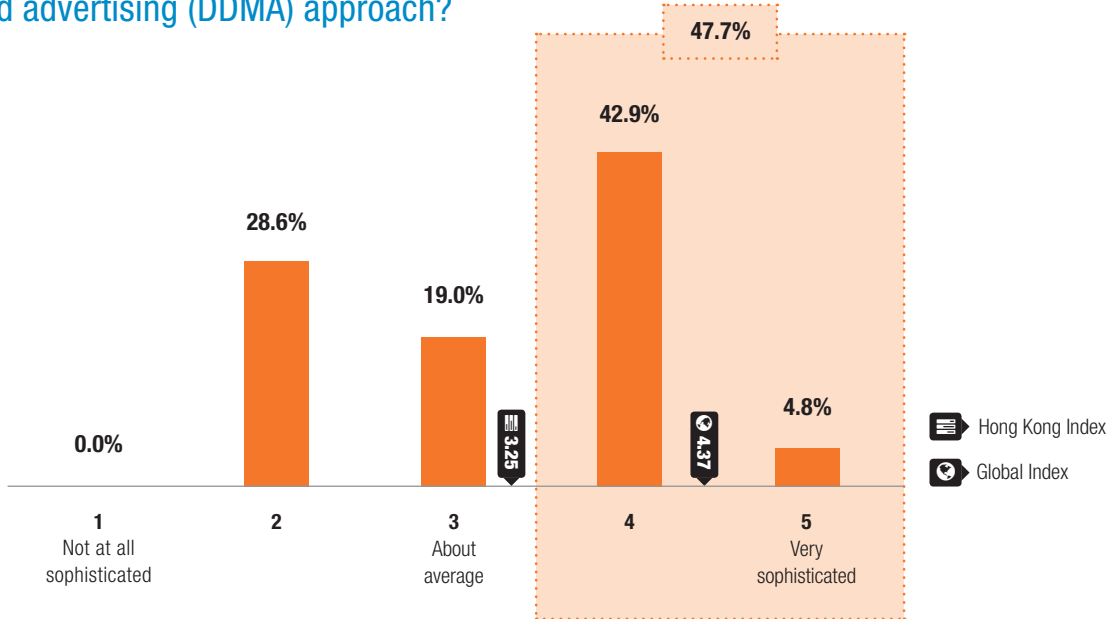
A NOTE ABOUT INDEX SCORES

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DDMA SOPHISTICATION

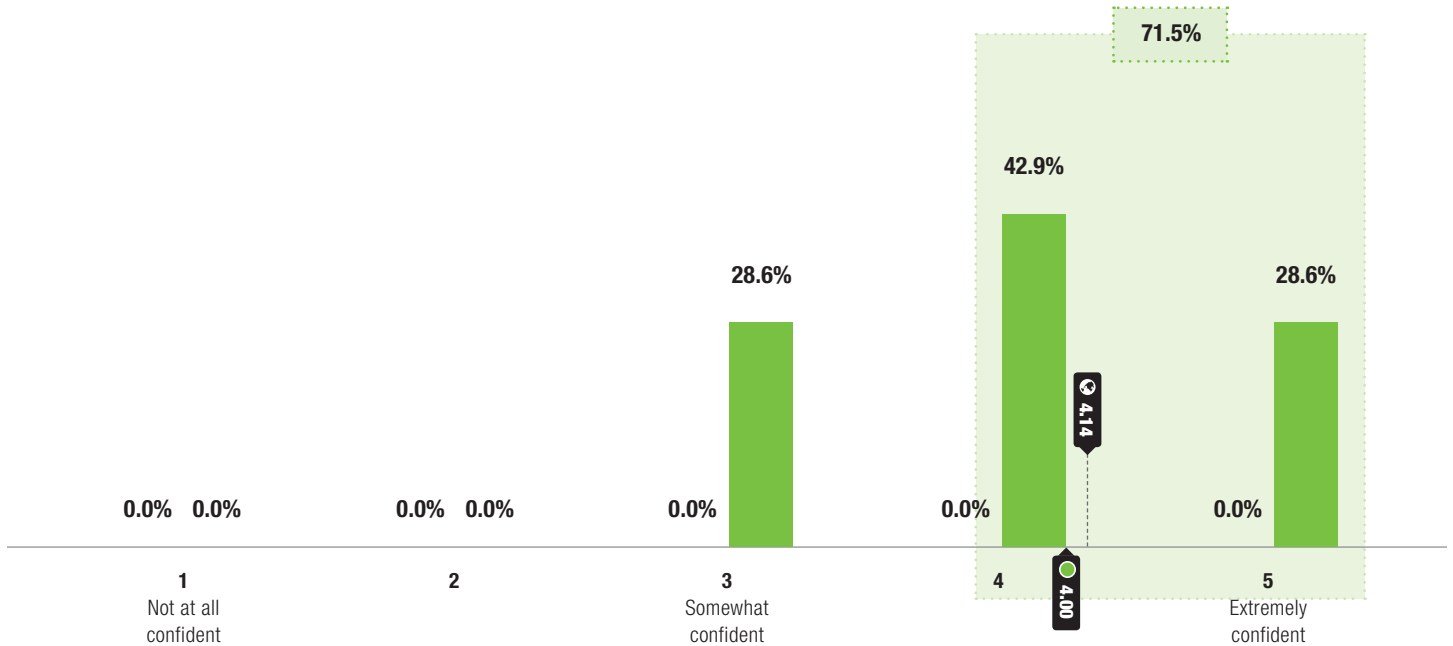
How sophisticated is your organization's data-driven marketing and advertising (DDMA) approach?



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?

● 2015
 Hong Kong Index
 Global Index (2015)

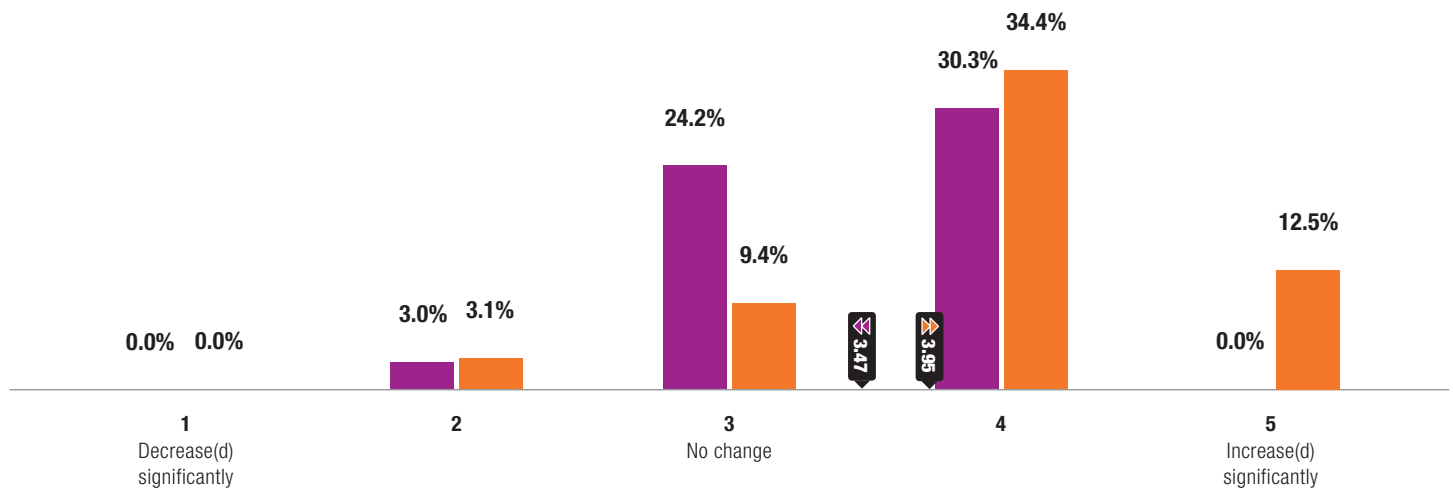


How are practitioners investing in DDMA? What returns are they generating?

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?

◀ The past year ▶ The coming year ■ Hong Kong 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 2015 ● Anticipated 2016 spending change



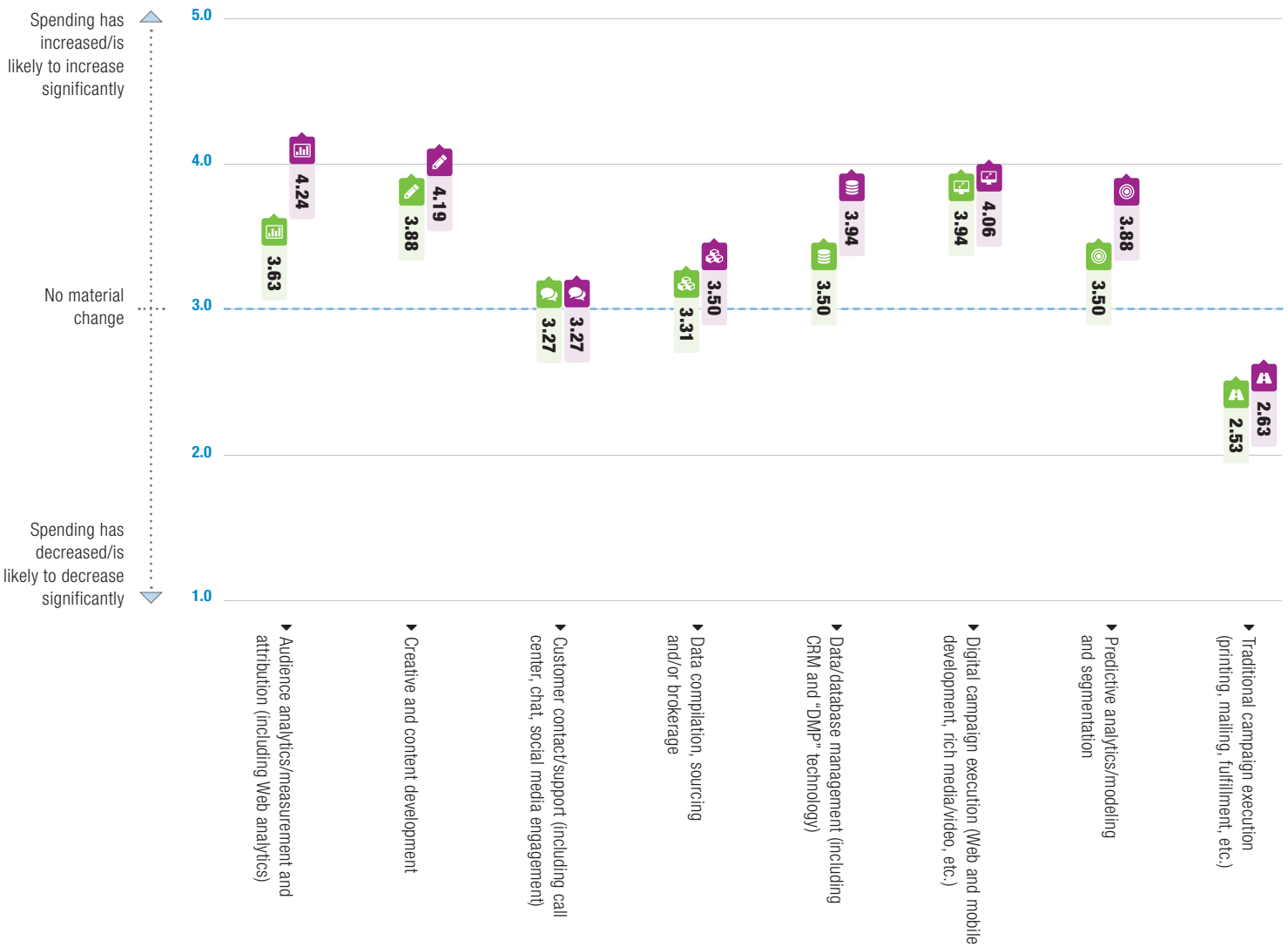
*Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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?

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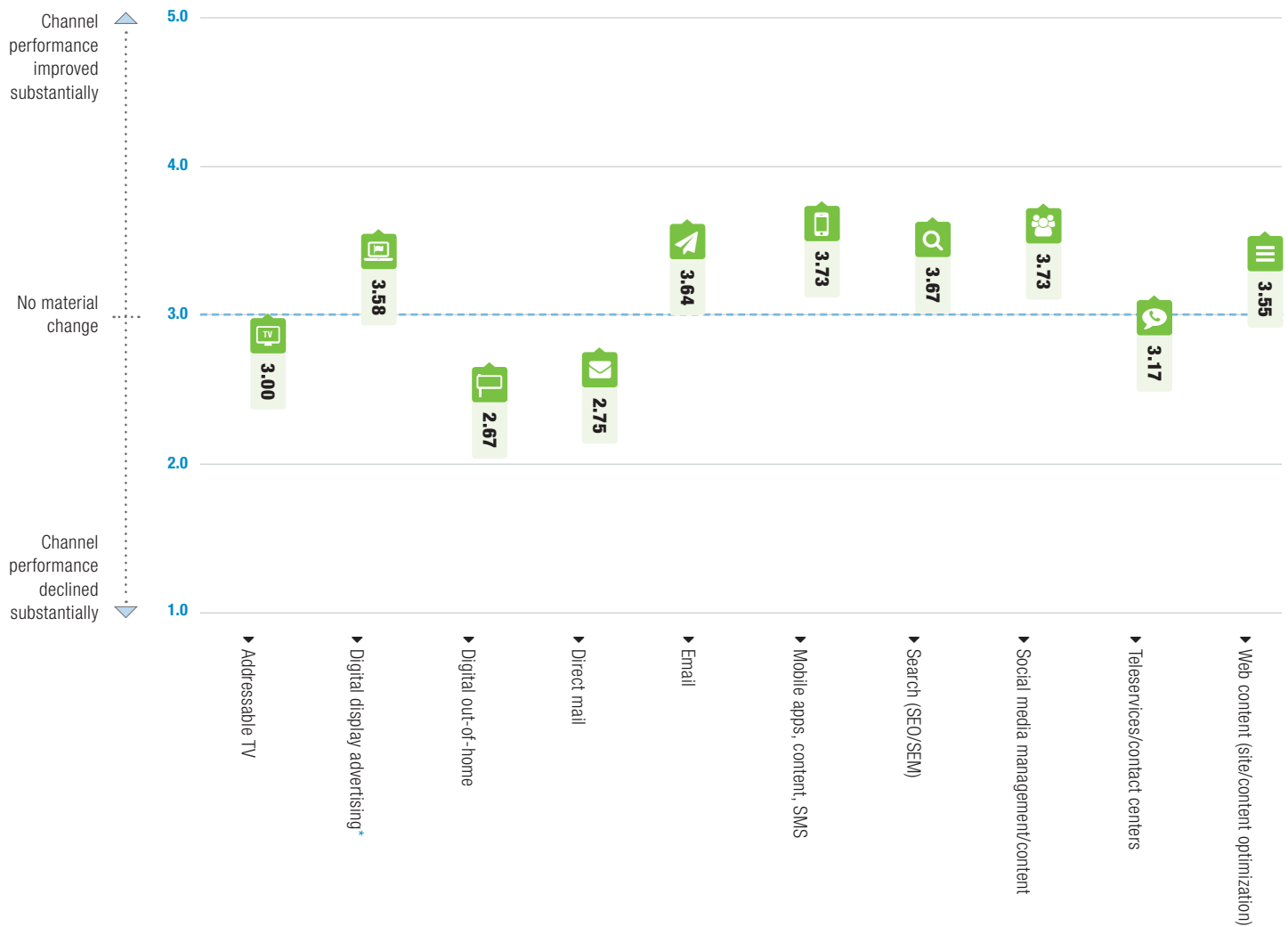


Note: Refer to page 18 of the 2015 *Global Review* for global averages

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



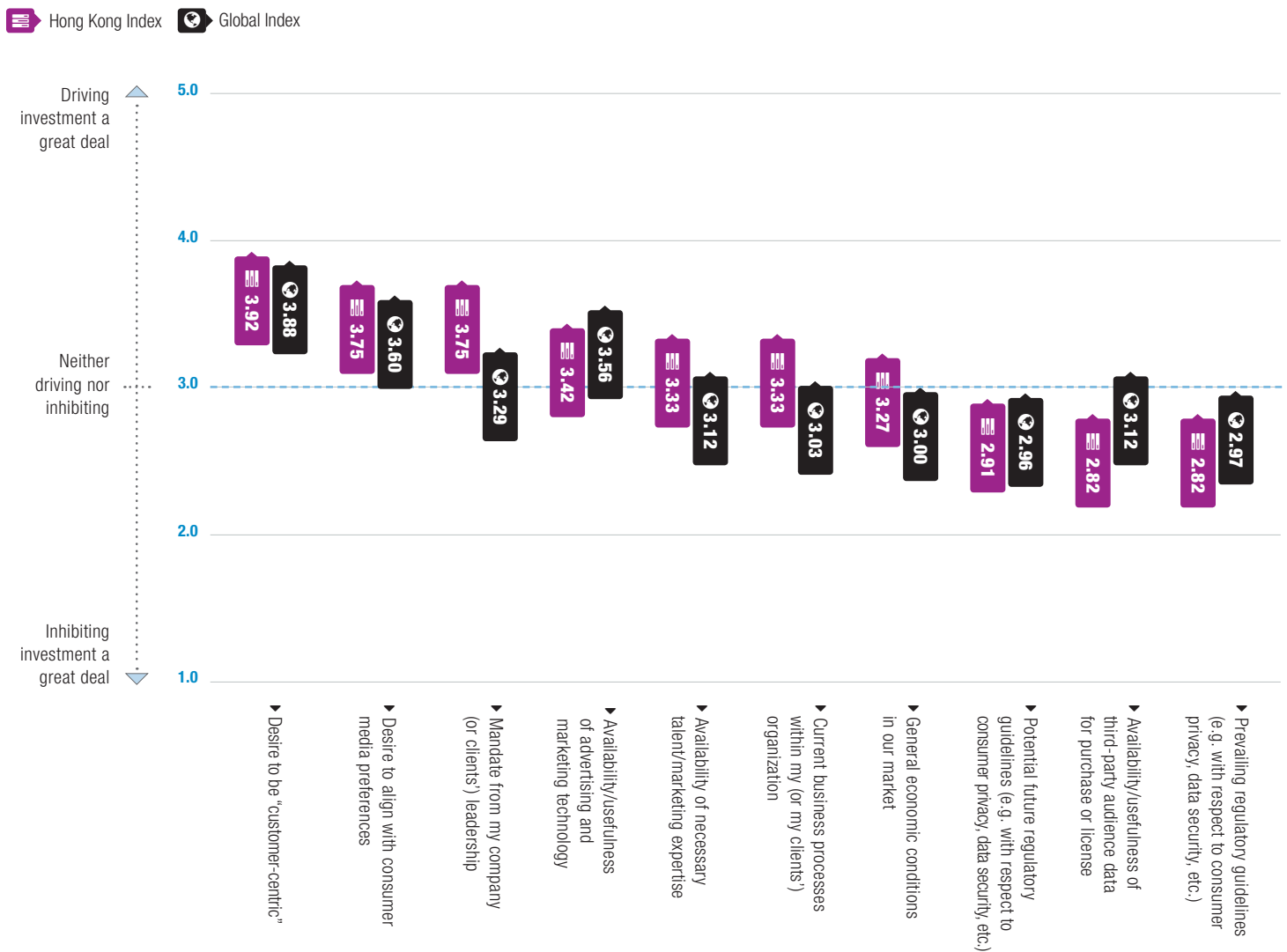
* Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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

What's driving the practice of DDMA? What's inhibiting it?

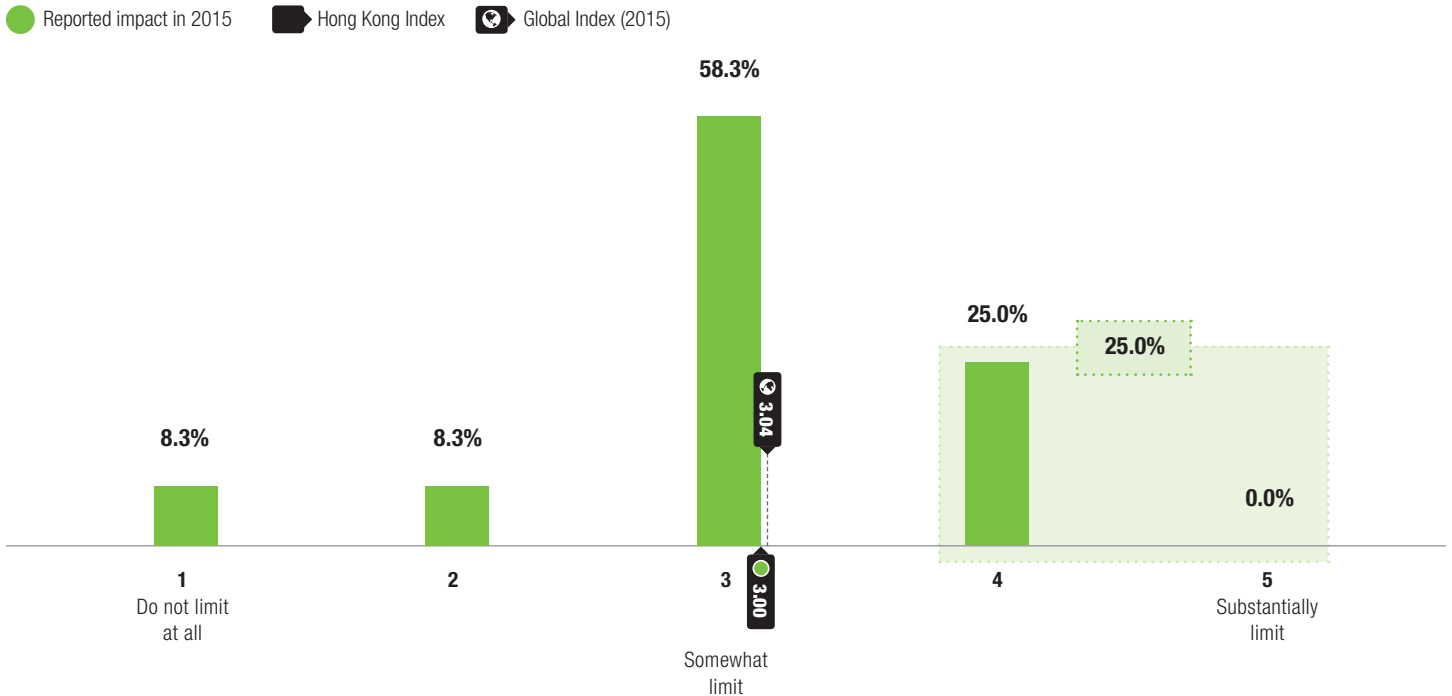
FACTORS DRIVING OR INHIBITING DDMA

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



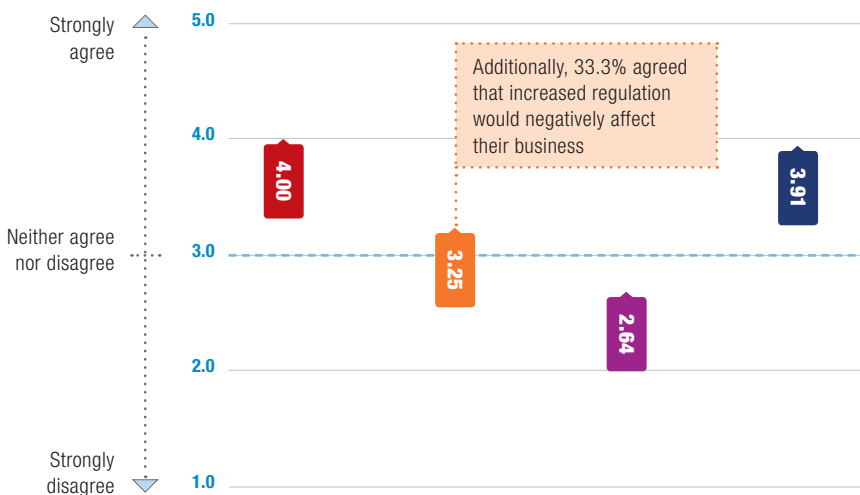
IMPACT OF REGULATION

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?



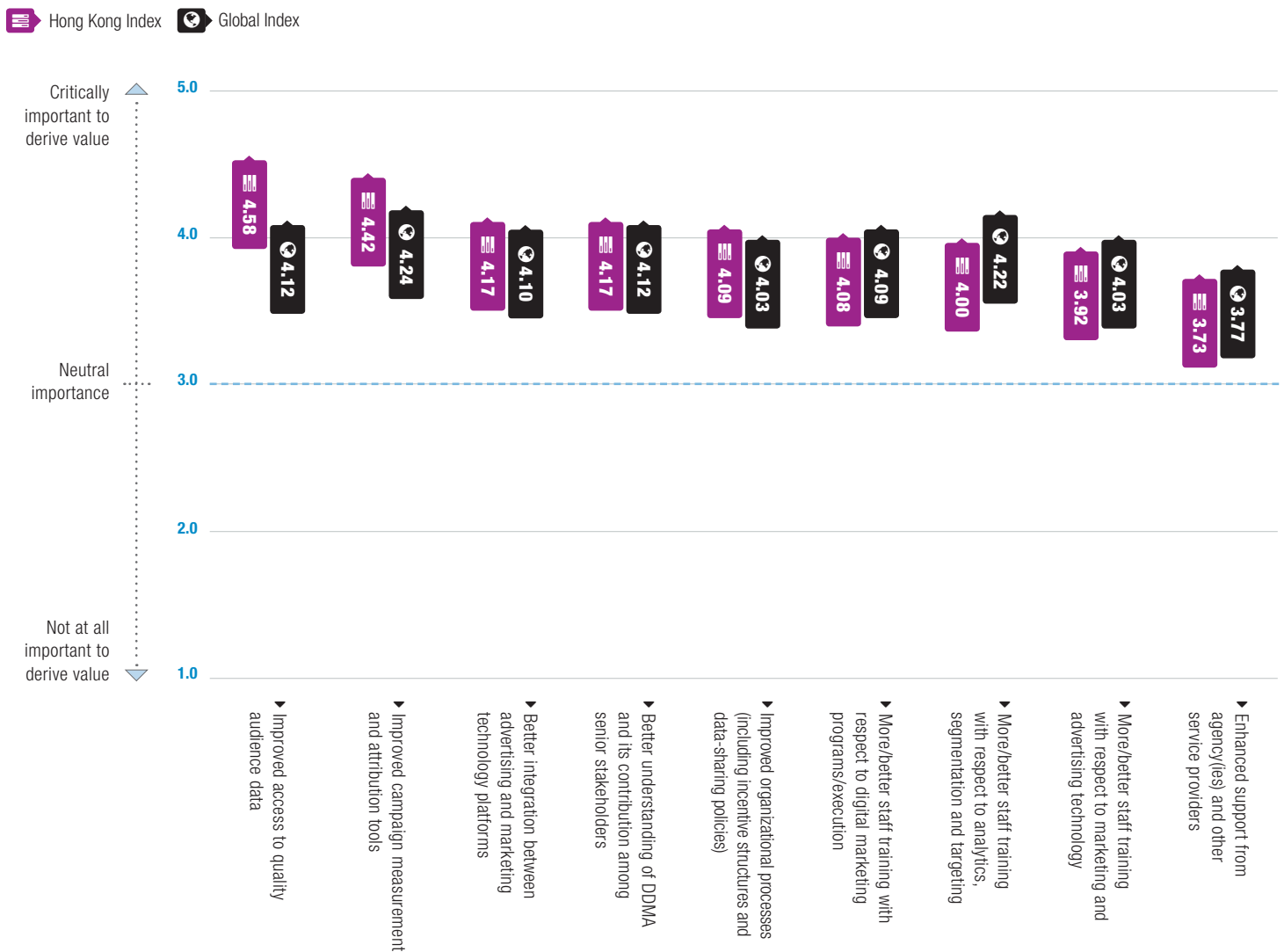
- Good marketing data governance represents a competitive advantage for its practitioners.
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What do practitioners need to derive greater value from DDMA?

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?



Hungary





Hungary

PANEL:
38 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY – AUGUST 2015

* Not all respondents answered every question

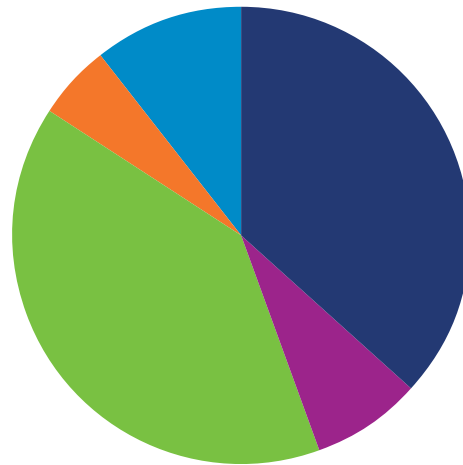
PRESENTING ASSOCIATION

The **Direkt és Interaktív Marketing Szövetség** (dimsz) 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



PANEL COMPOSITION

How would you describe your principal role/business focus?

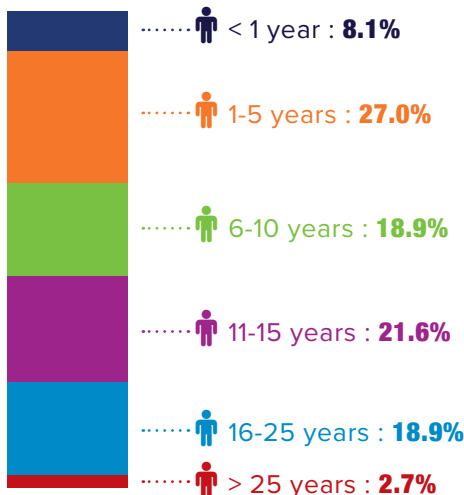


- **MARKETER/ADVERTISER : 36.8%**
- **PUBLISHER/MEDIA : 7.9%**
(focused on selling advertising)
- **PROVIDER OF MARKETING SERVICES : 39.5%**
(including data and agency services)
- **DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY : 5.3%**
- **OTHER : 10.5%**

EXPERIENCE

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

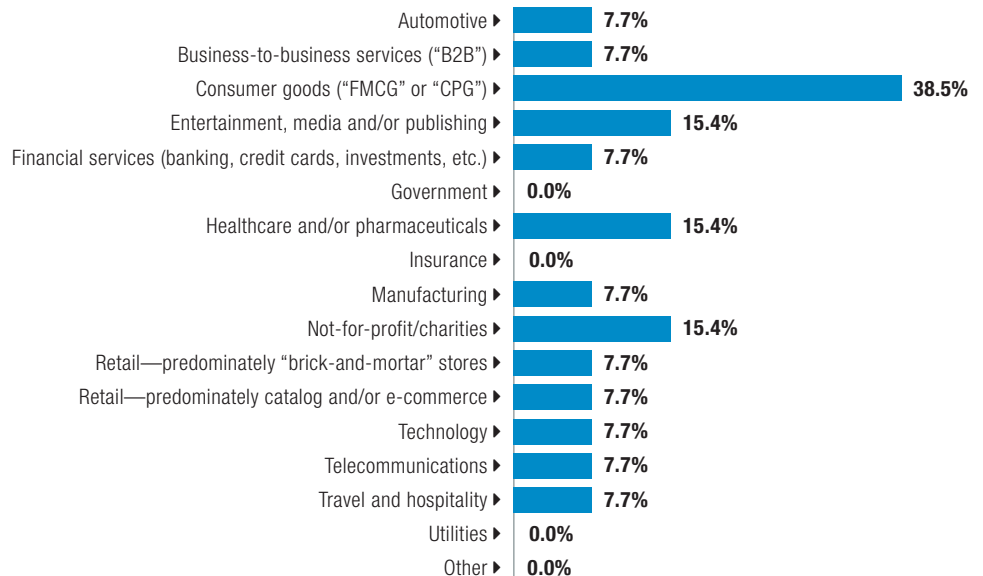
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INDUSTRY REPRESENTATION

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

Displaying panelists' "top three" responses

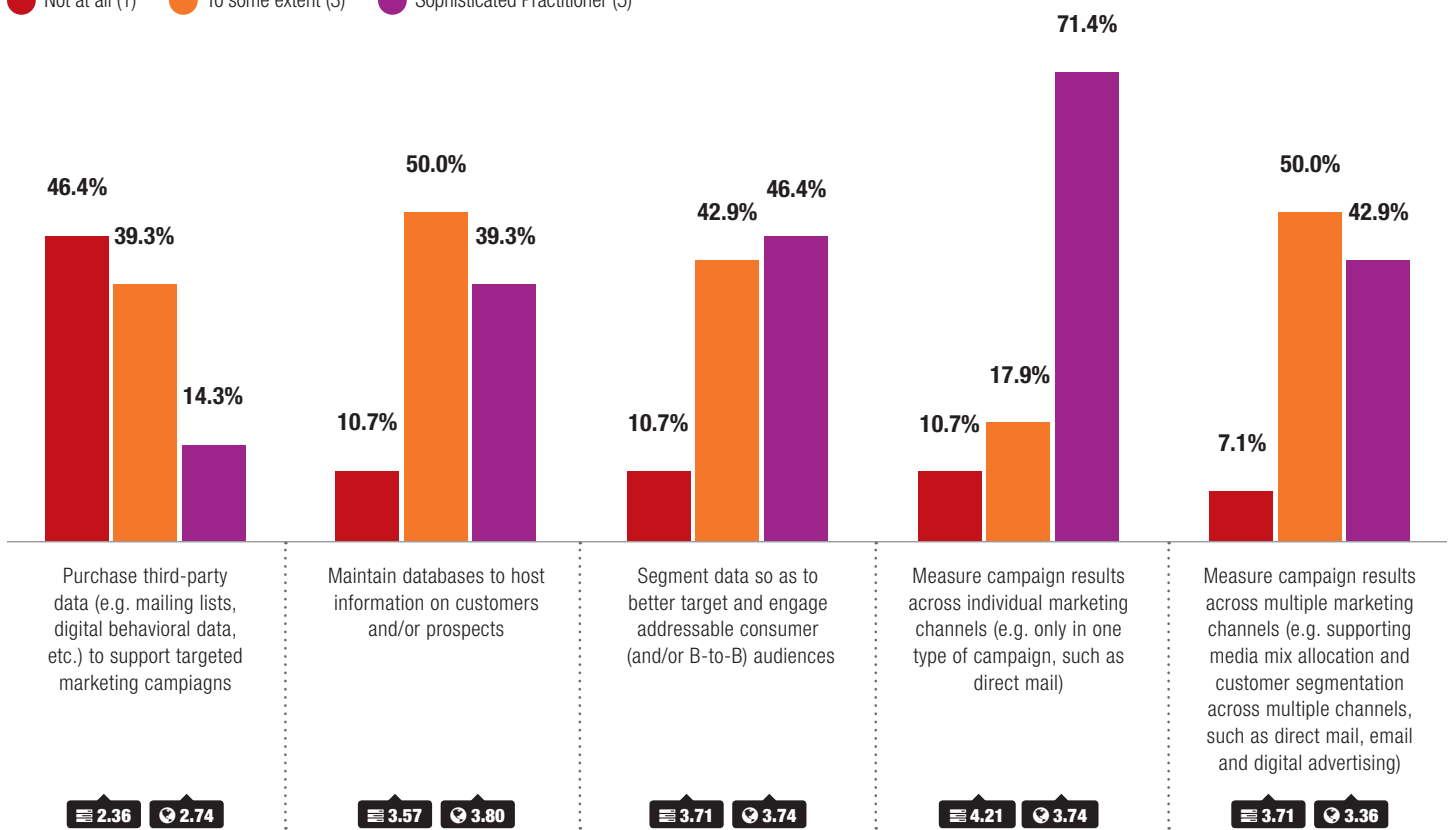


What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

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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Hungary Index

Global Index

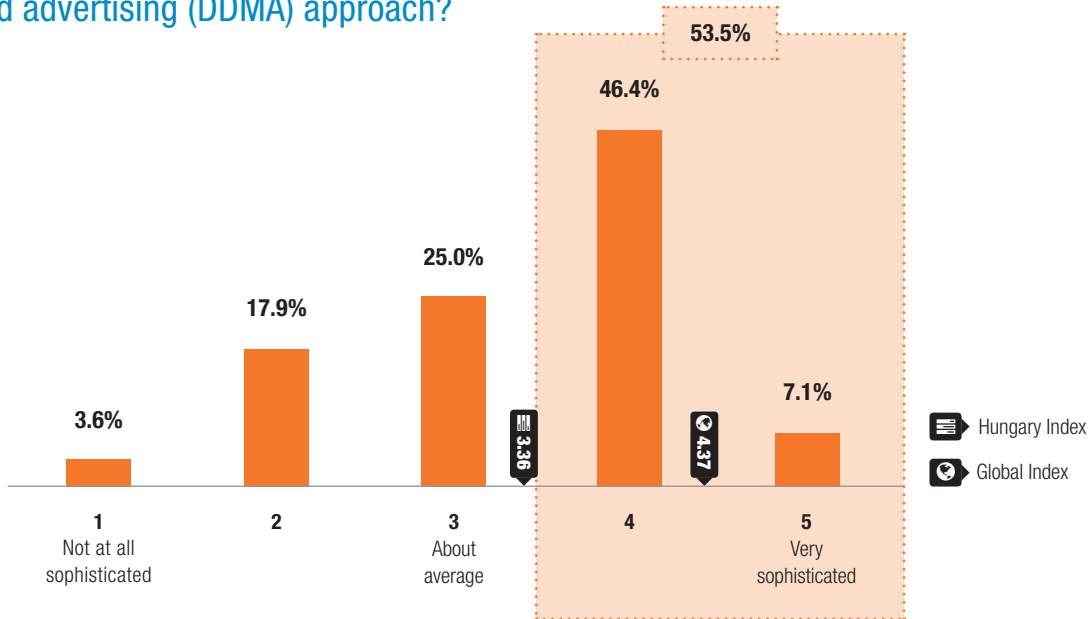
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DDMA SOPHISTICATION

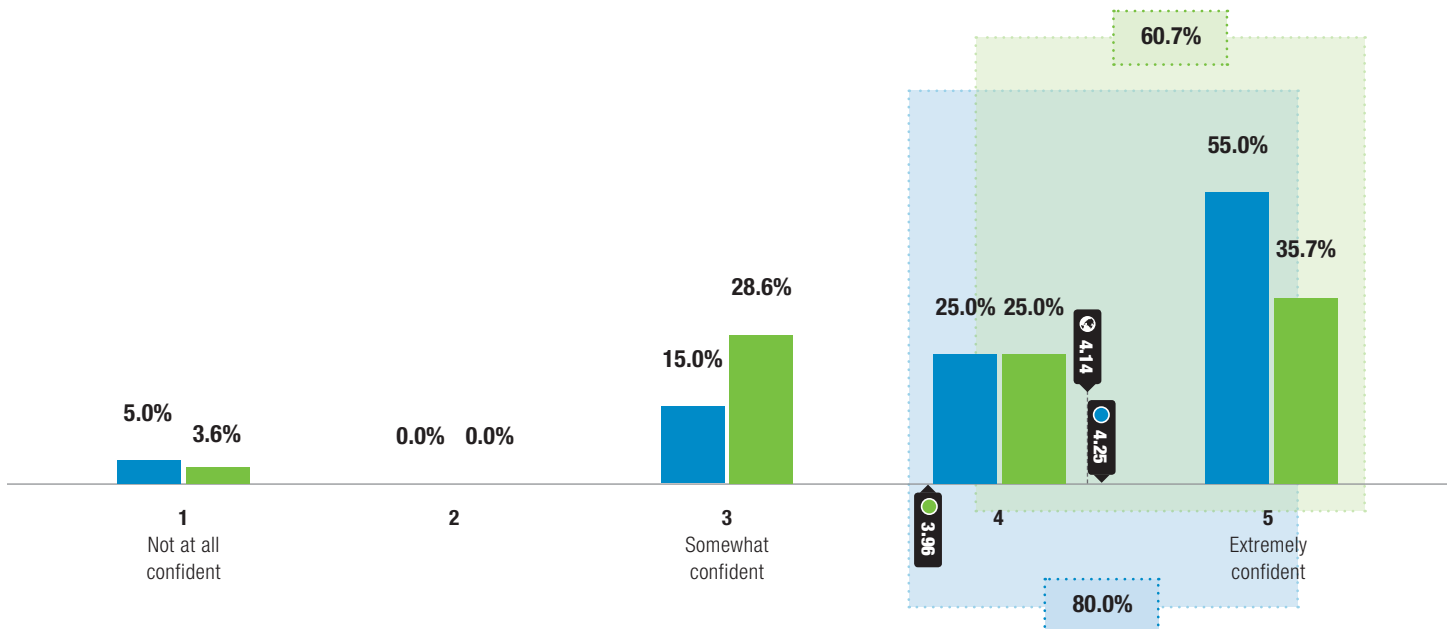
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CONFIDENCE IN DDMA

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● 2014 ● 2015 ■ Hungary Index ■ Global Index (2015)

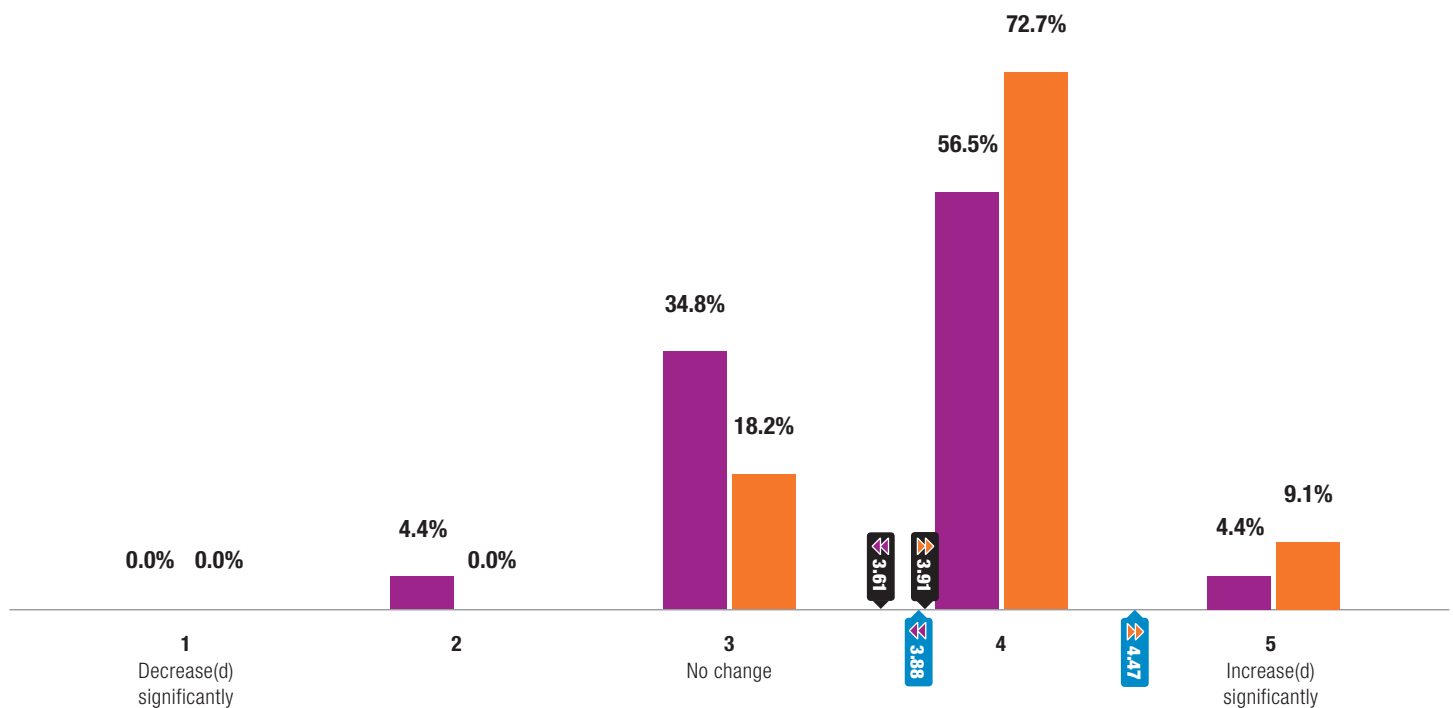


How are practitioners investing in DDMA? What returns are they generating?

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?

◀ The past year
 ▶ The coming year
 ▶ Hungary Index (2014)
 ▶ Hungary Index (2015)

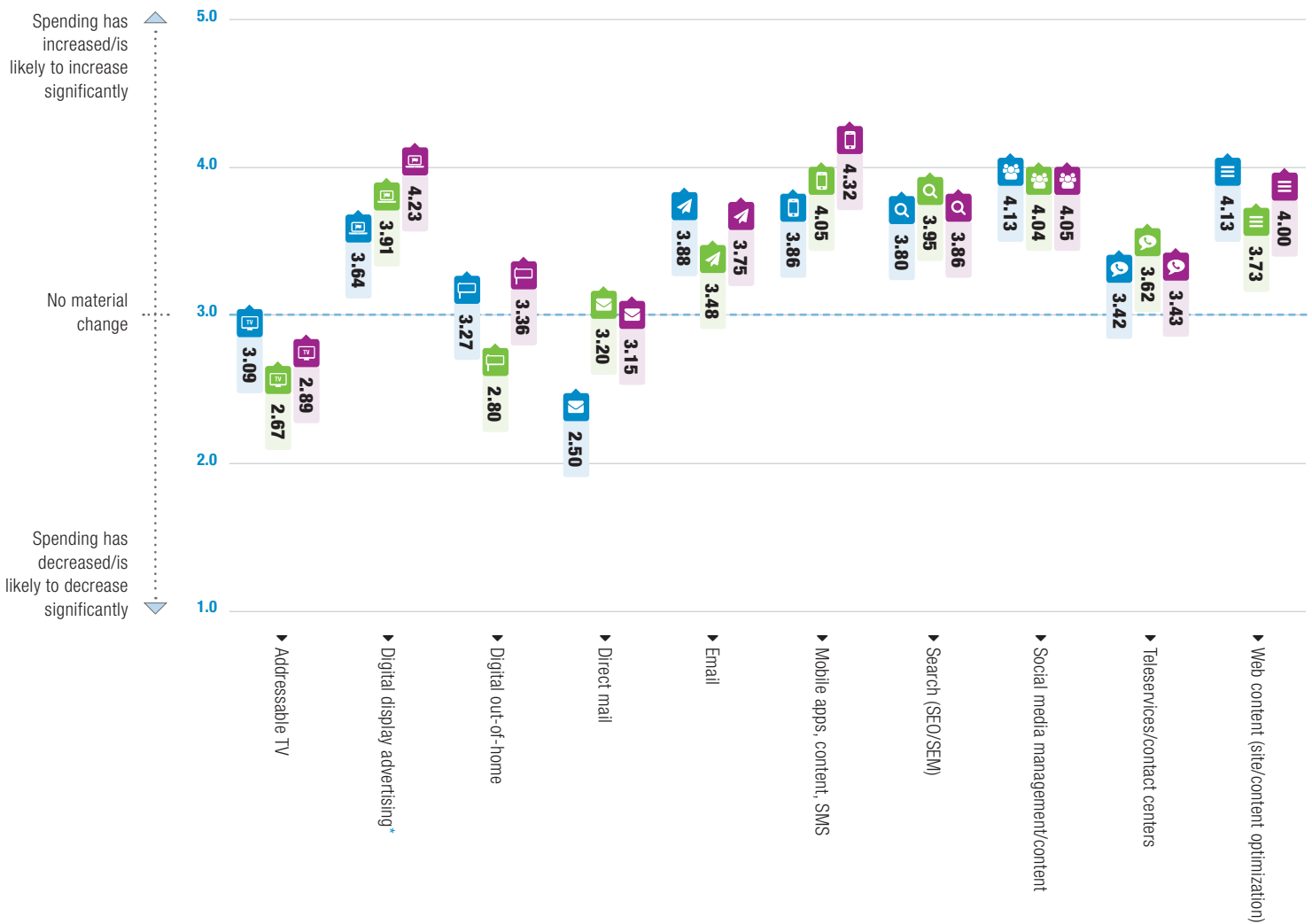


Note: Refer to page 16 of the 2015 *Global Review* for global averages

SPENDING ON DDMA CHANNELS

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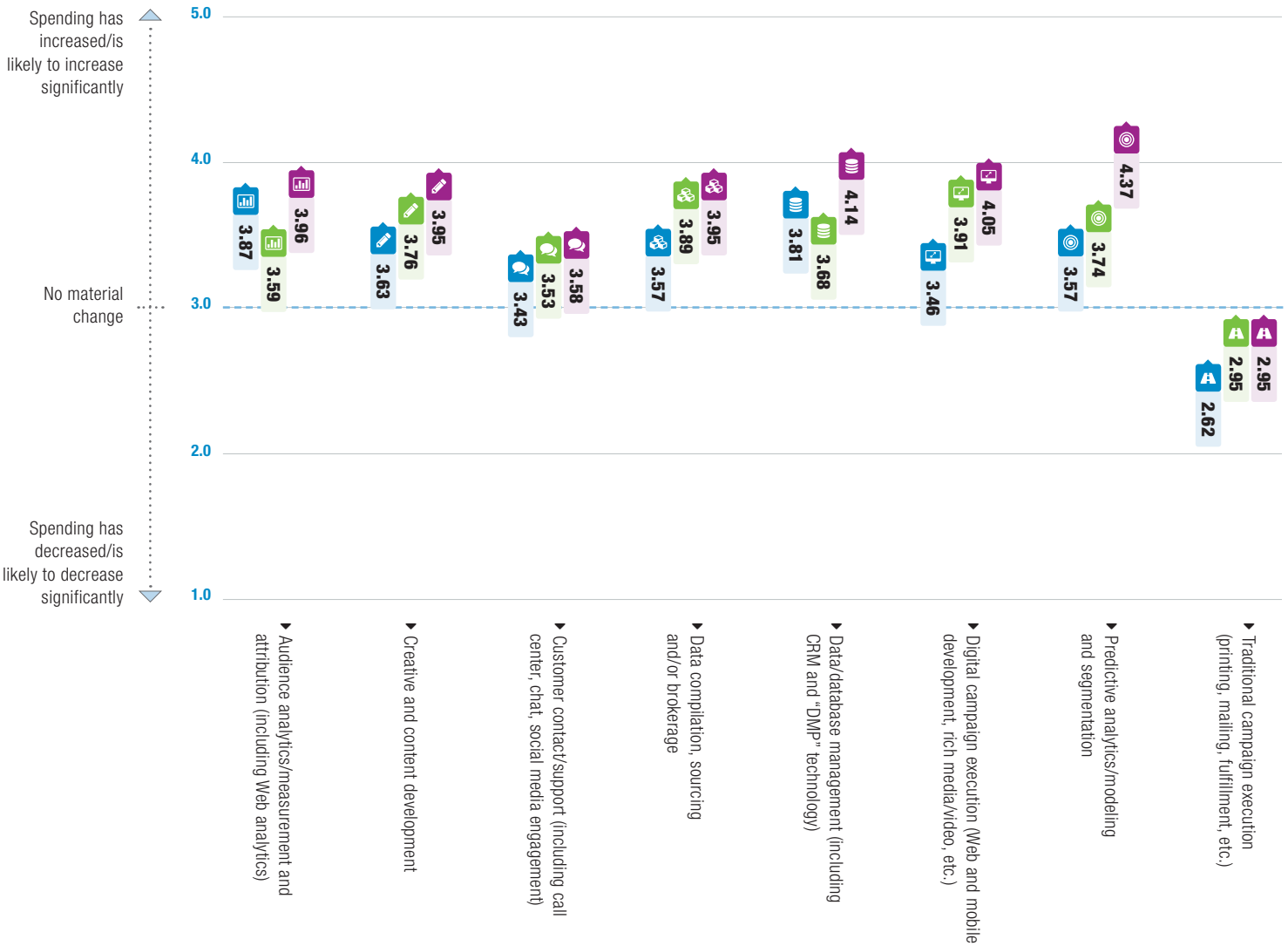
*Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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SPENDING ON DDMA FUNCTIONS

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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



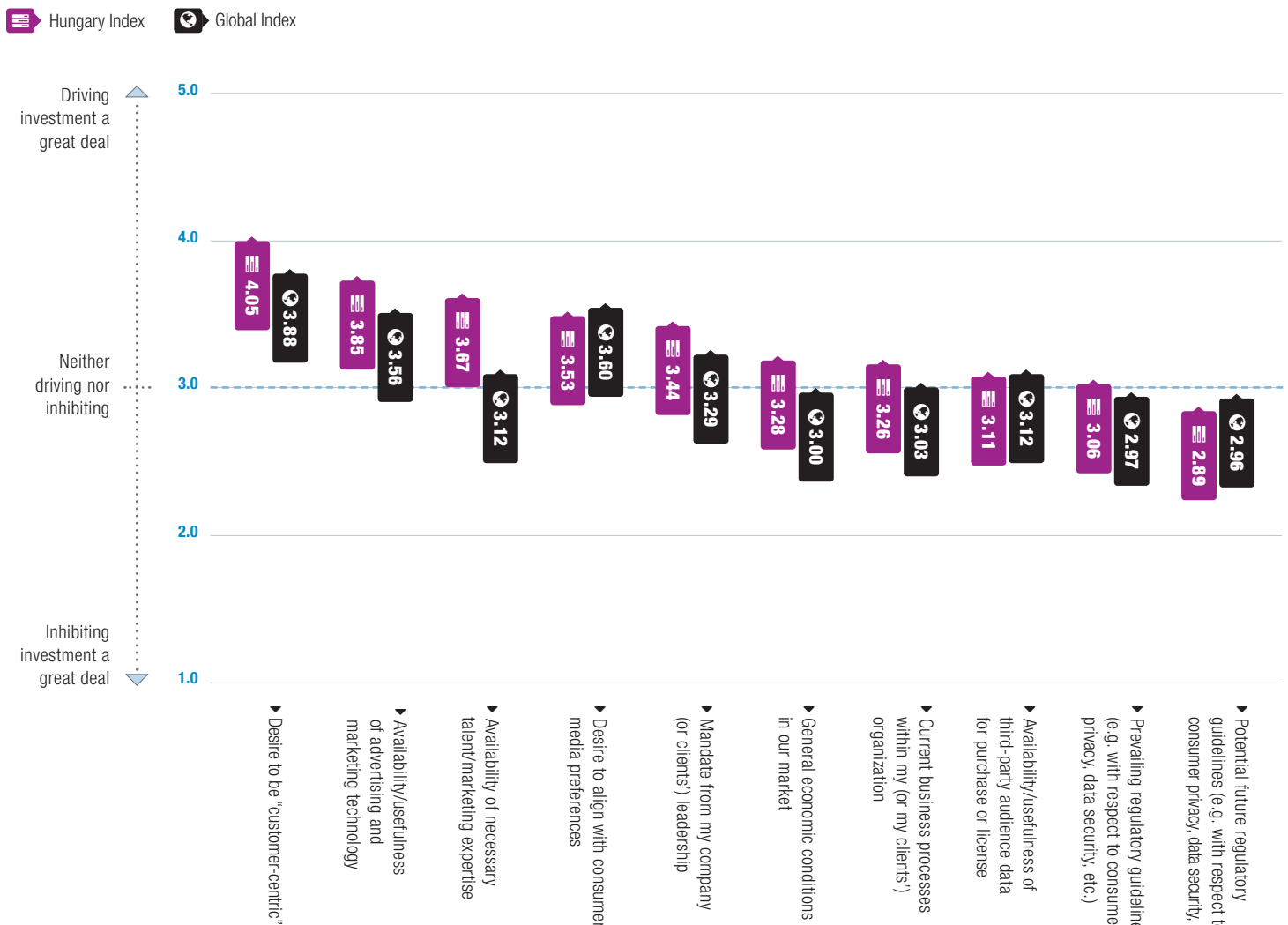
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Note: Refer to page 19 of the 2015 *Global Review* for global averages

What's driving the practice of DDMA? What's inhibiting it?

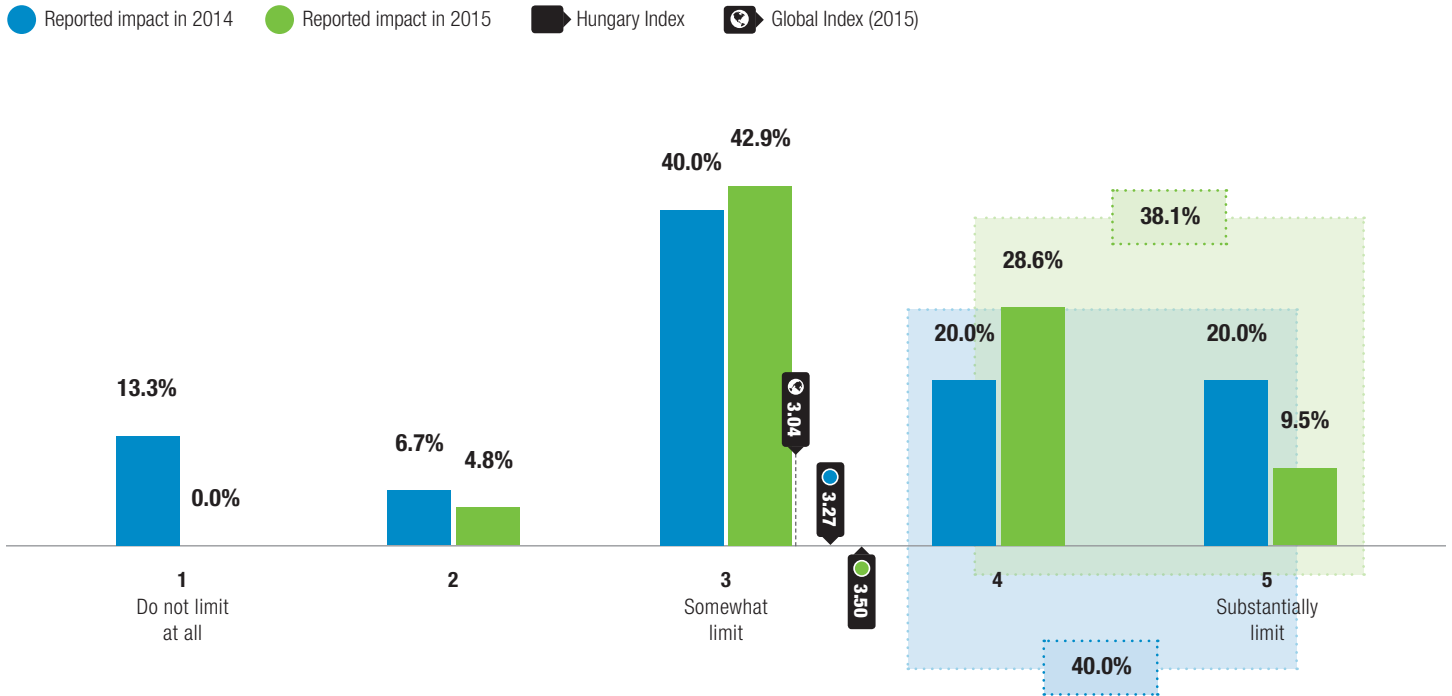
FACTORS DRIVING OR INHIBITING DDMA

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



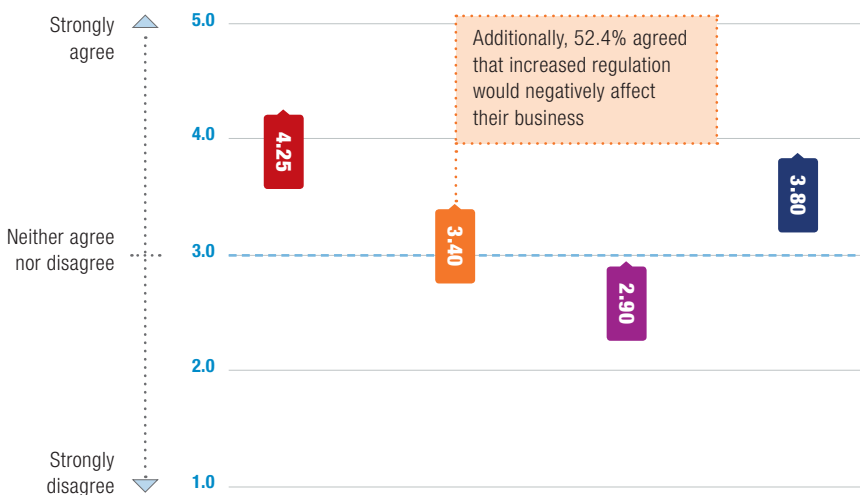
IMPACT OF REGULATION

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?



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- 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?



India





India

PANEL:
92 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
**AUGUST – SEPTEMBER
2015**

* Not all respondents answered every question

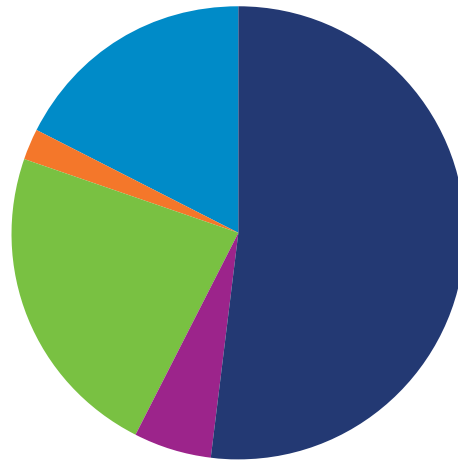
PRESENTING ASSOCIATION



DMAi, since 1992, has worked to advance and protect responsible data-driven marketing and advertising in India. To make marketing relevant and improve customer engagement, DMAi advocates for creating industry standards for ethical conduct and effective self-regulation of the data-driven marketing and advertising community. For more information, please visit www.dmai.co

PANEL COMPOSITION

How would you describe your principal role/business focus?

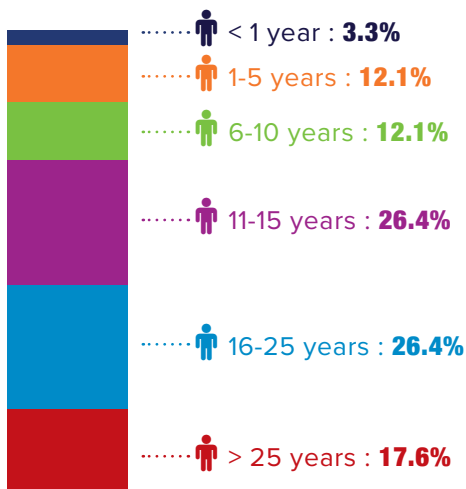


- **MARKETER/ADVERTISER : 52.2%**
- **PUBLISHER/MEDIA : 5.4%**
(focused on selling advertising)
- **PROVIDER OF MARKETING SERVICES : 22.8%**
(including data and agency services)
- **DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY : 2.2%**
- **OTHER : 17.4%**

EXPERIENCE

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

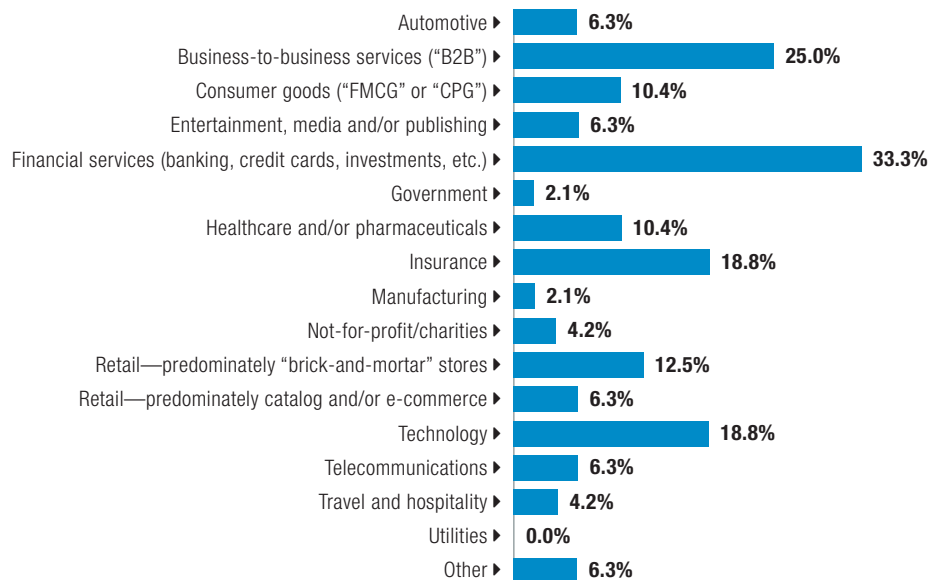
Please consider your current job and past professional roles that may apply.



INDUSTRY REPRESENTATION

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

Displaying panelists' "top three" responses

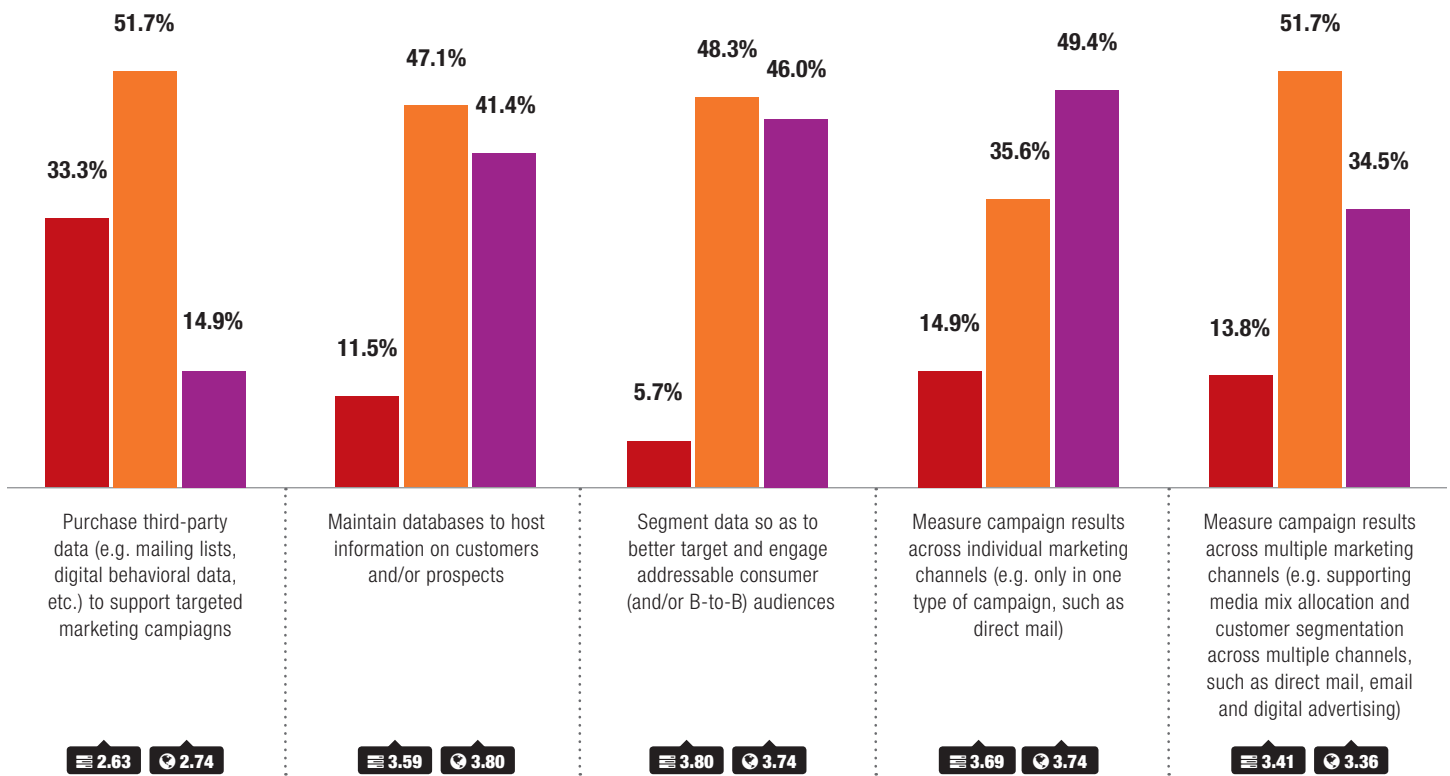


What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

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

India Index

Global Index

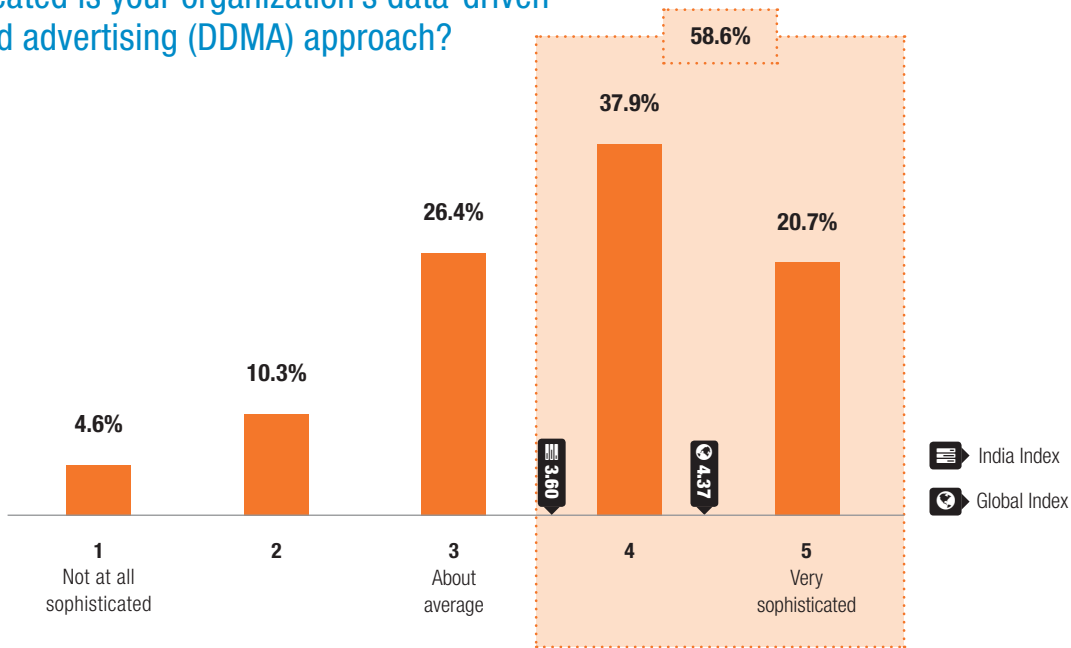
A NOTE ABOUT INDEX SCORES

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

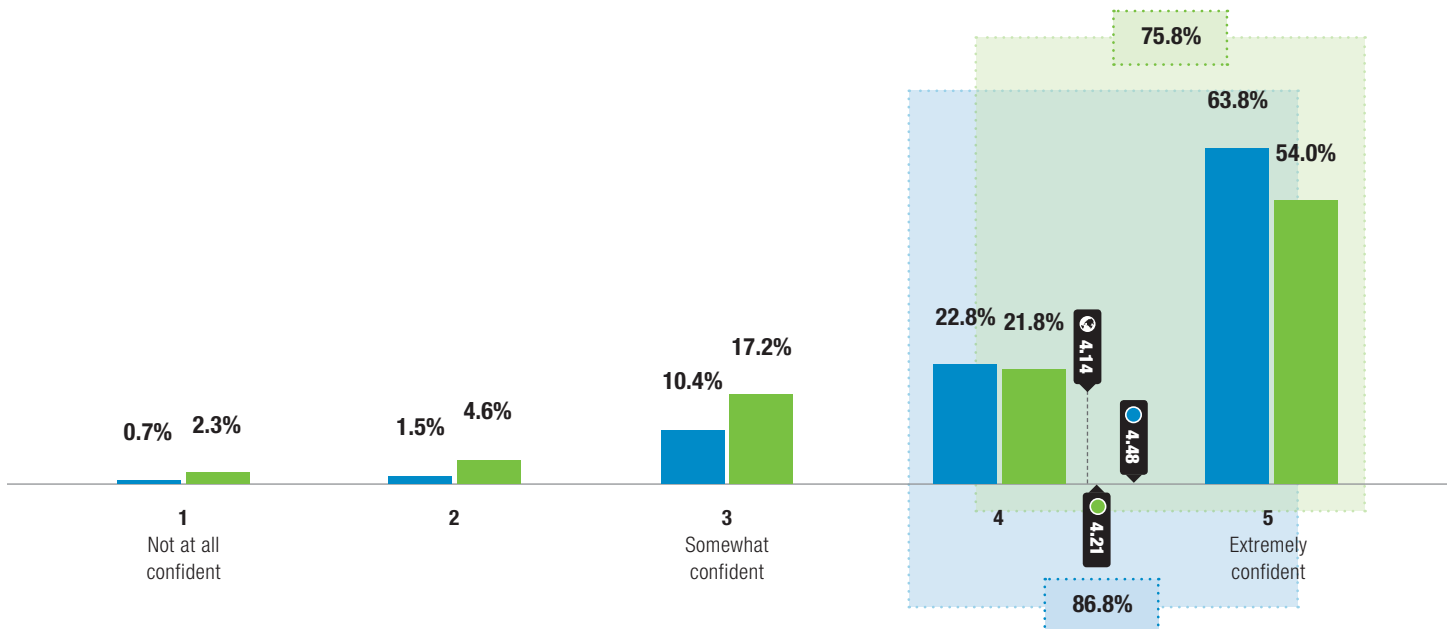
How sophisticated is your organization's data-driven marketing and advertising (DDMA) approach?



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?

● 2014 ● 2015 ■ India Index ■ Global Index (2015)

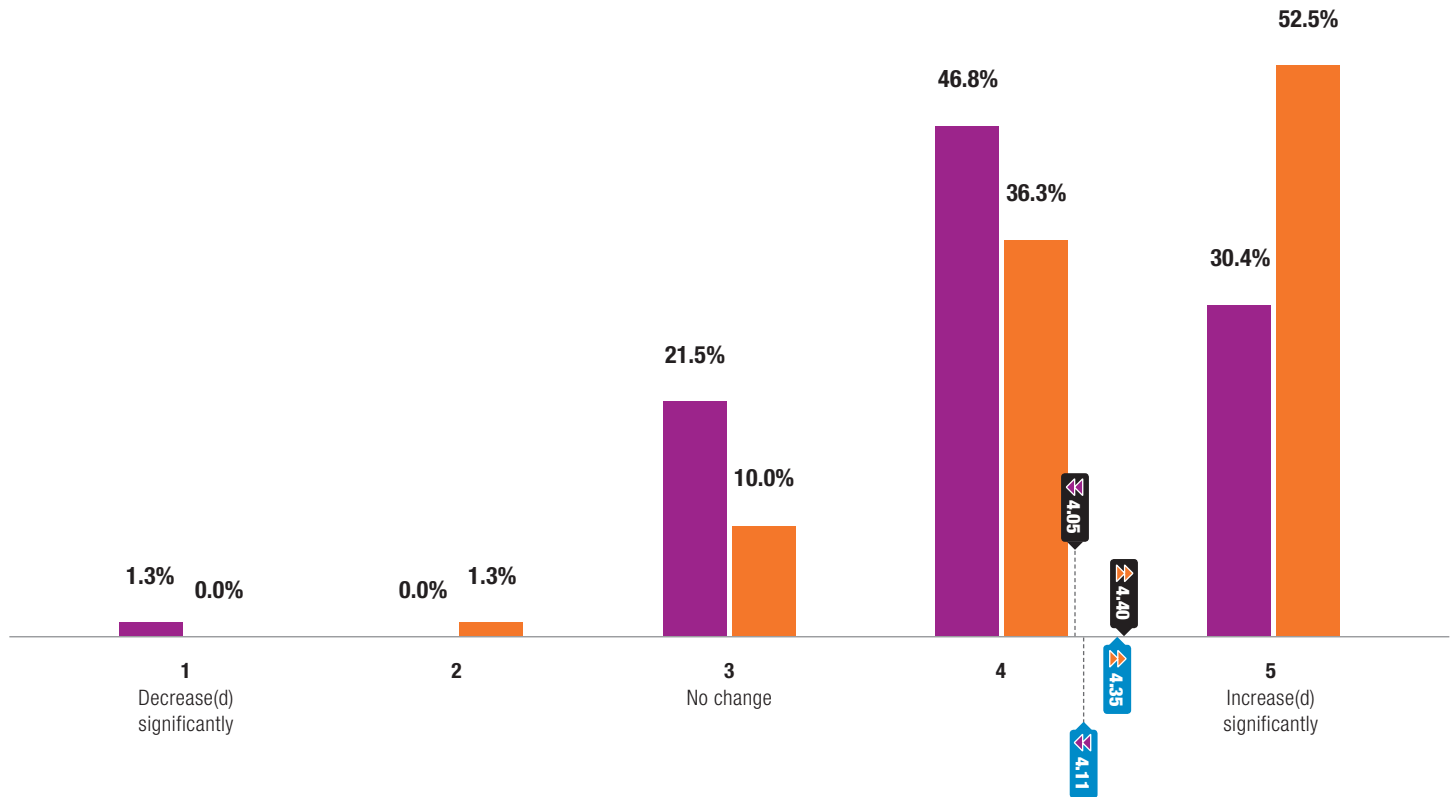


How are practitioners investing in DDMA? What returns are they generating?

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?

◀ The past year ▶ The coming year ■ India Index (2014) ■ India Index (2015)

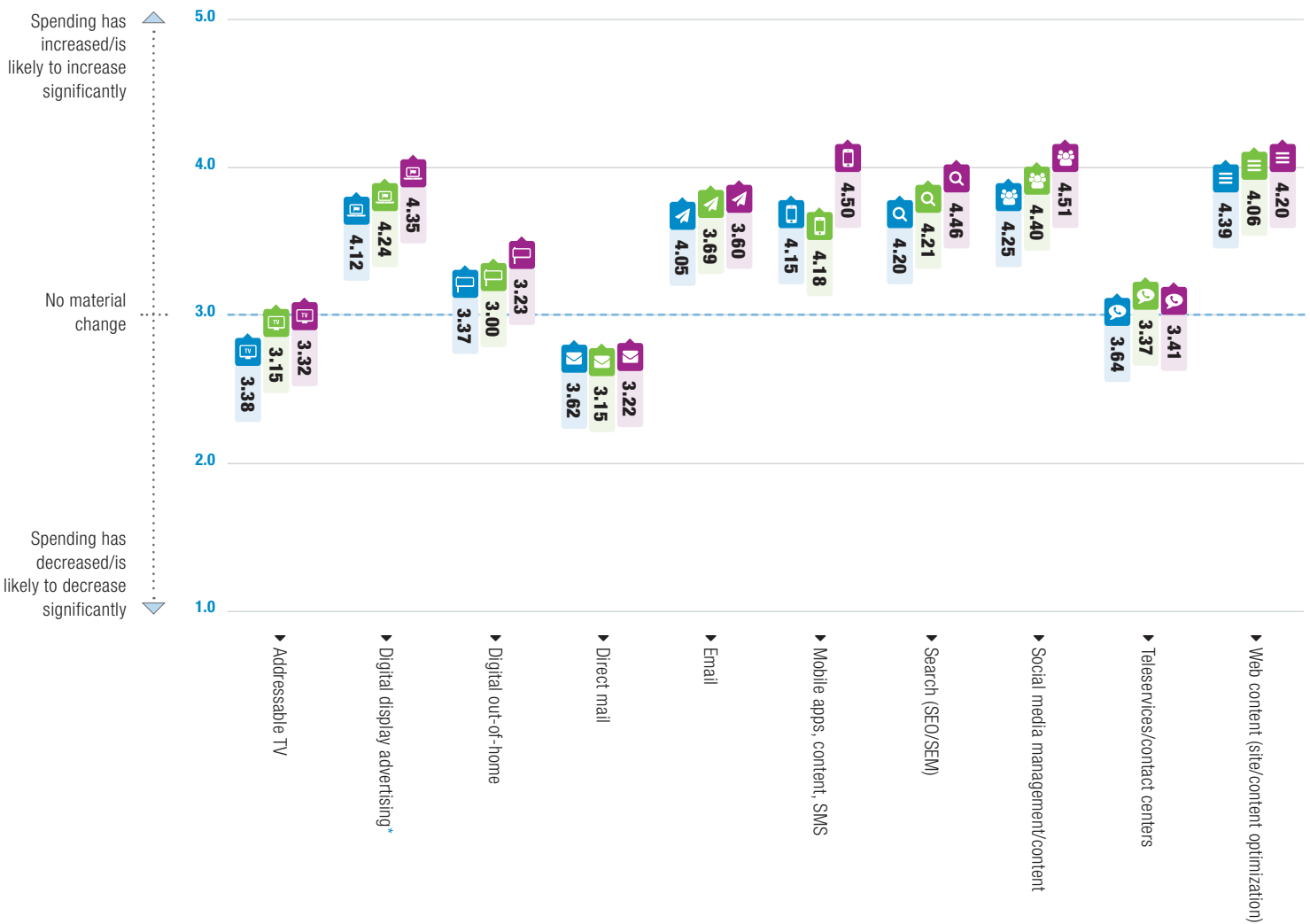


Note: Refer to page 16 of the 2015 *Global Review* for global averages

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



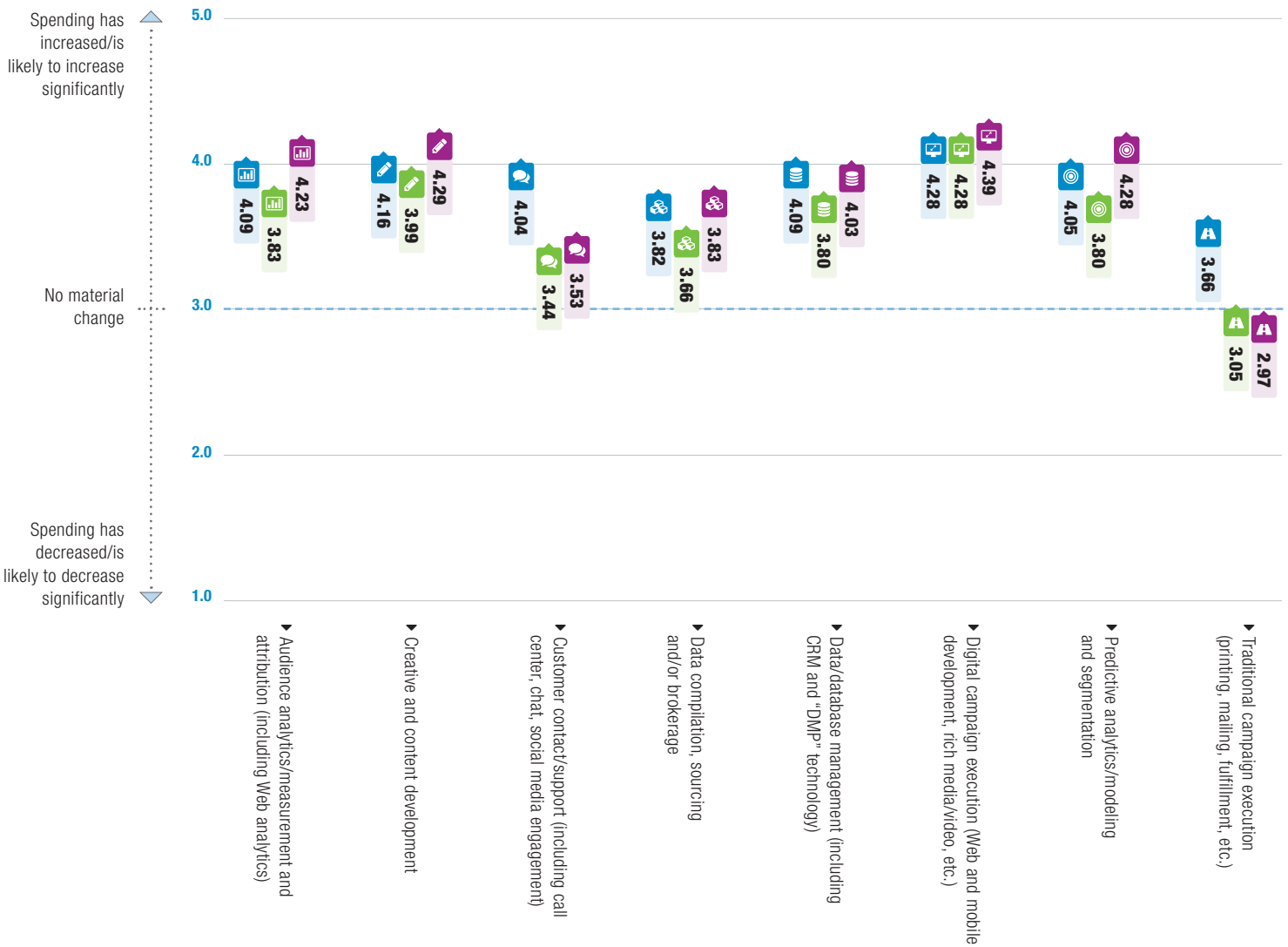
*Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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

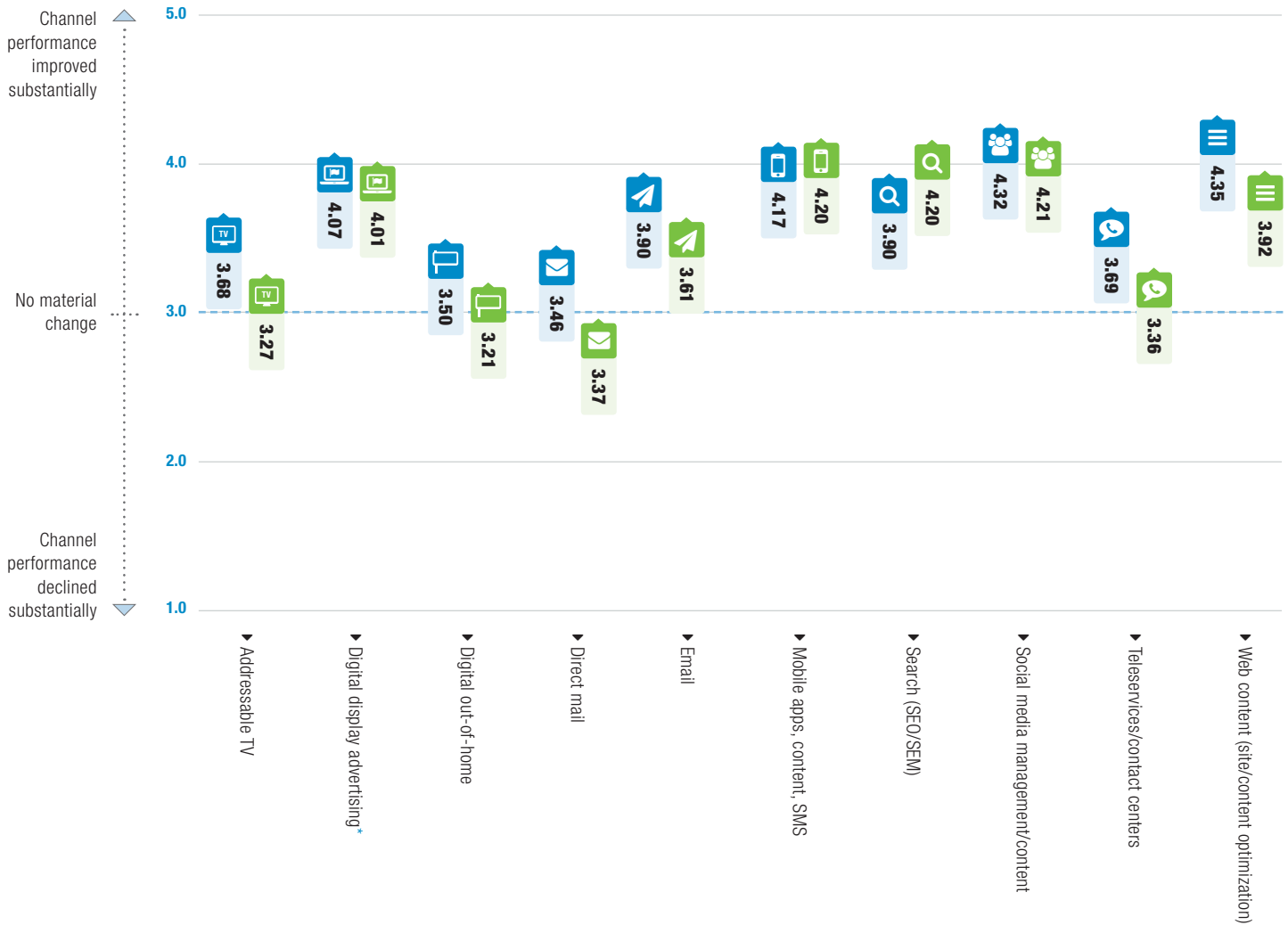


Note: Refer to page 18 of the 2015 Global Review for global averages

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



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

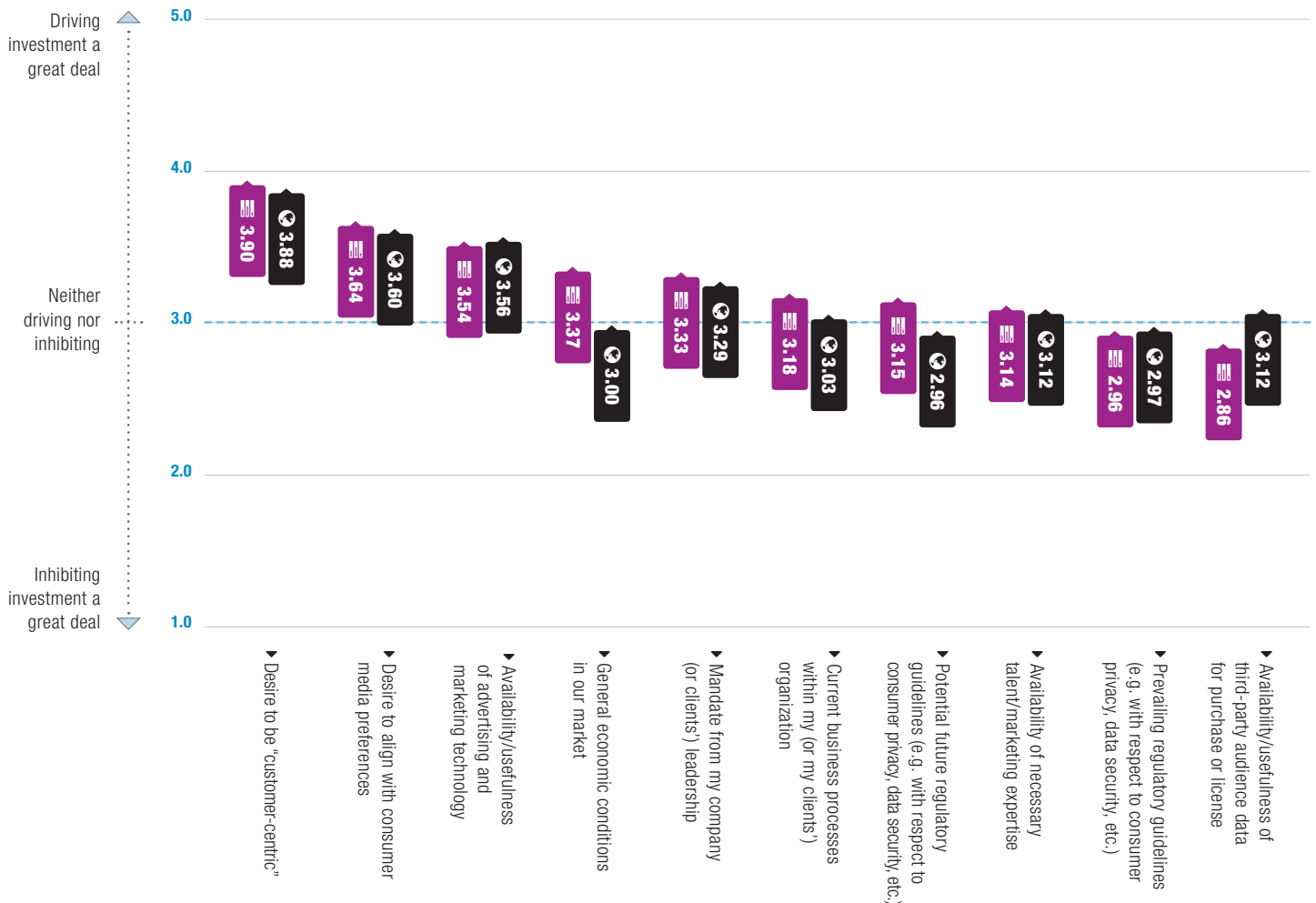
Note: Refer to page 19 of the 2015 *Global Review* for global averages

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?

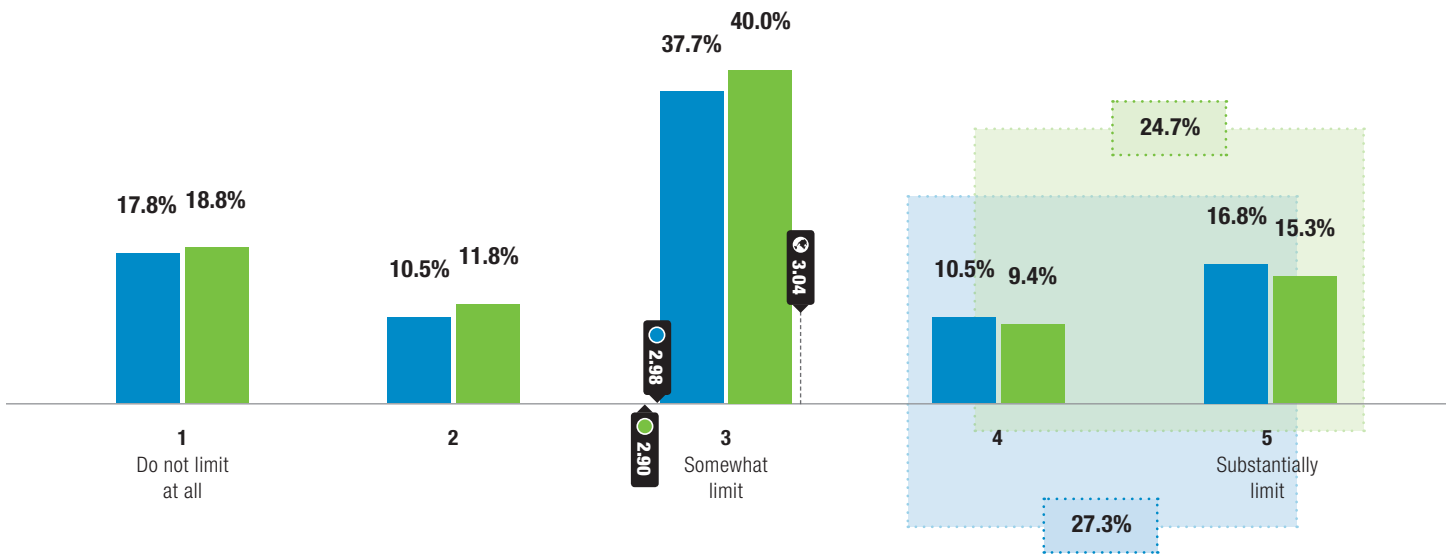
India Index Global Index



IMPACT OF REGULATION

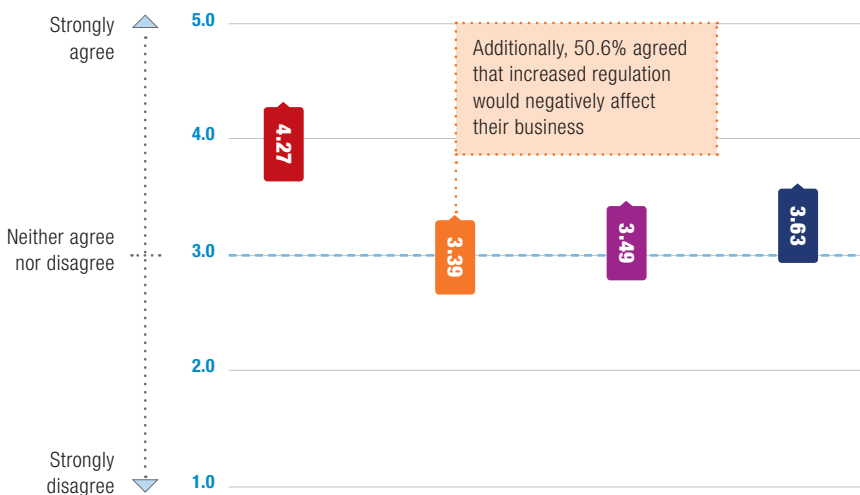
To what extent are regulatory barriers in your marketplace (e.g. limits on access to data, requirements for affirmative consumer opt-in to marketing communications, etc.) actively limiting your ability to pursue data-driven marketing and advertising initiatives?

● Reported impact in 2014 ● Reported impact in 2015 🇮🇳 India Index 🌐 Global Index (2015)



PERSPECTIVES ON REGULATION

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



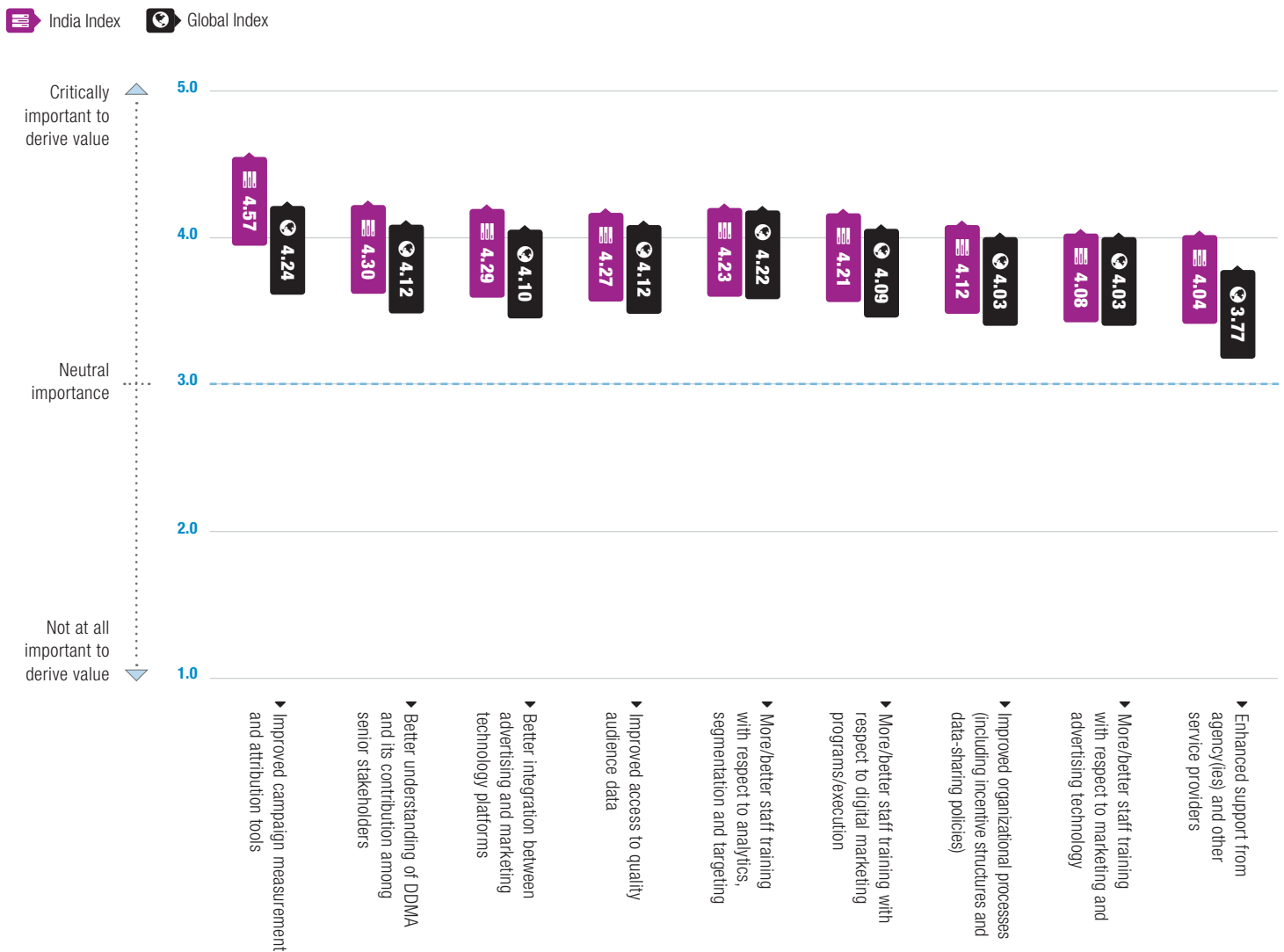
- Good marketing data governance represents a competitive advantage for its practitioners.
- I fear that increased regulation of the use of marketing data in my market will negatively affect my business.
- Practicing data-driven marketing is easier in my market than in others.
- Regulations for marketing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



Italy





Italy

PANEL:
168 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY – SEPTEMBER 2015

* Not all respondents answered every question

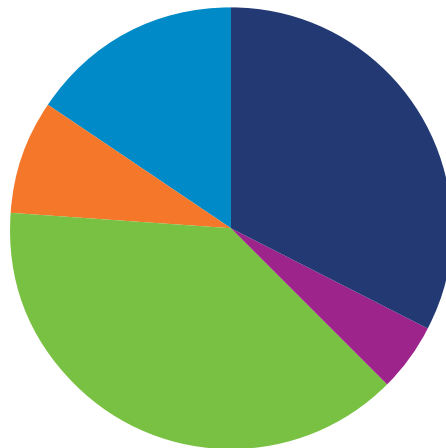
PRESENTING ASSOCIATION

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.dmailtaalia.it



PANEL COMPOSITION

How would you describe your principal role/business focus?

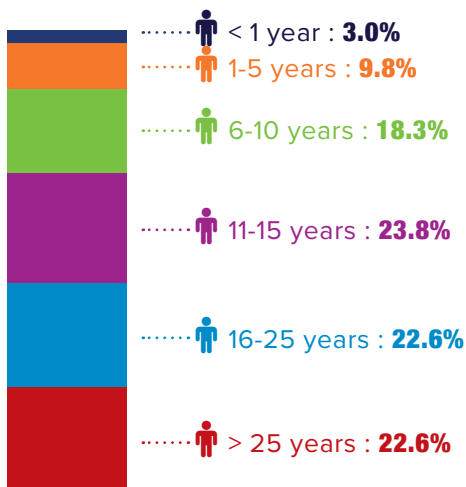


- **MARKETER/ADVERTISER : 32.7%**
- **PUBLISHER/MEDIA : 4.8%**
(focused on selling advertising)
- **PROVIDER OF MARKETING SERVICES : 38.7%**
(including data and agency services)
- **DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY : 8.3%**
- **OTHER : 15.5%**

EXPERIENCE

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

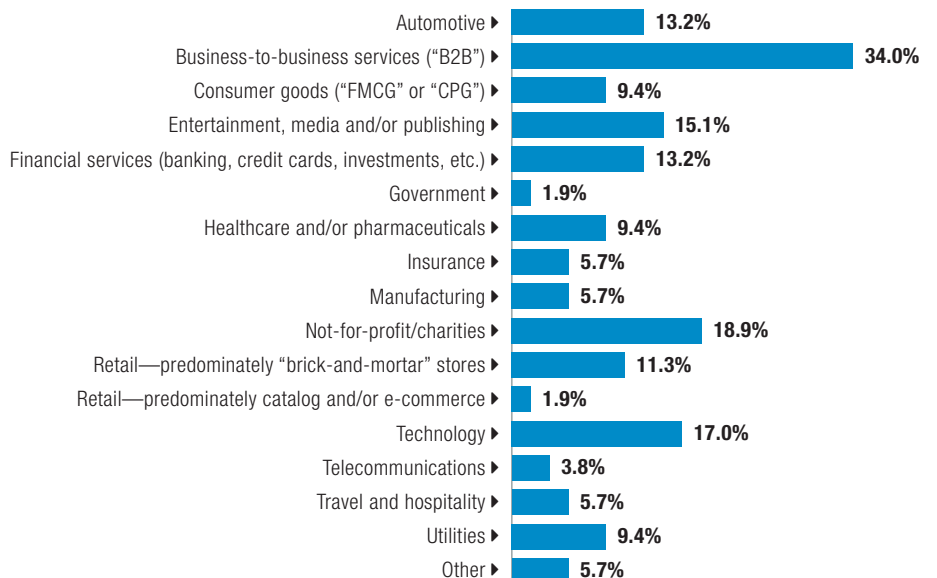
Please consider your current job and past professional roles that may apply.



INDUSTRY REPRESENTATION

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

Displaying panelists' "top three" responses

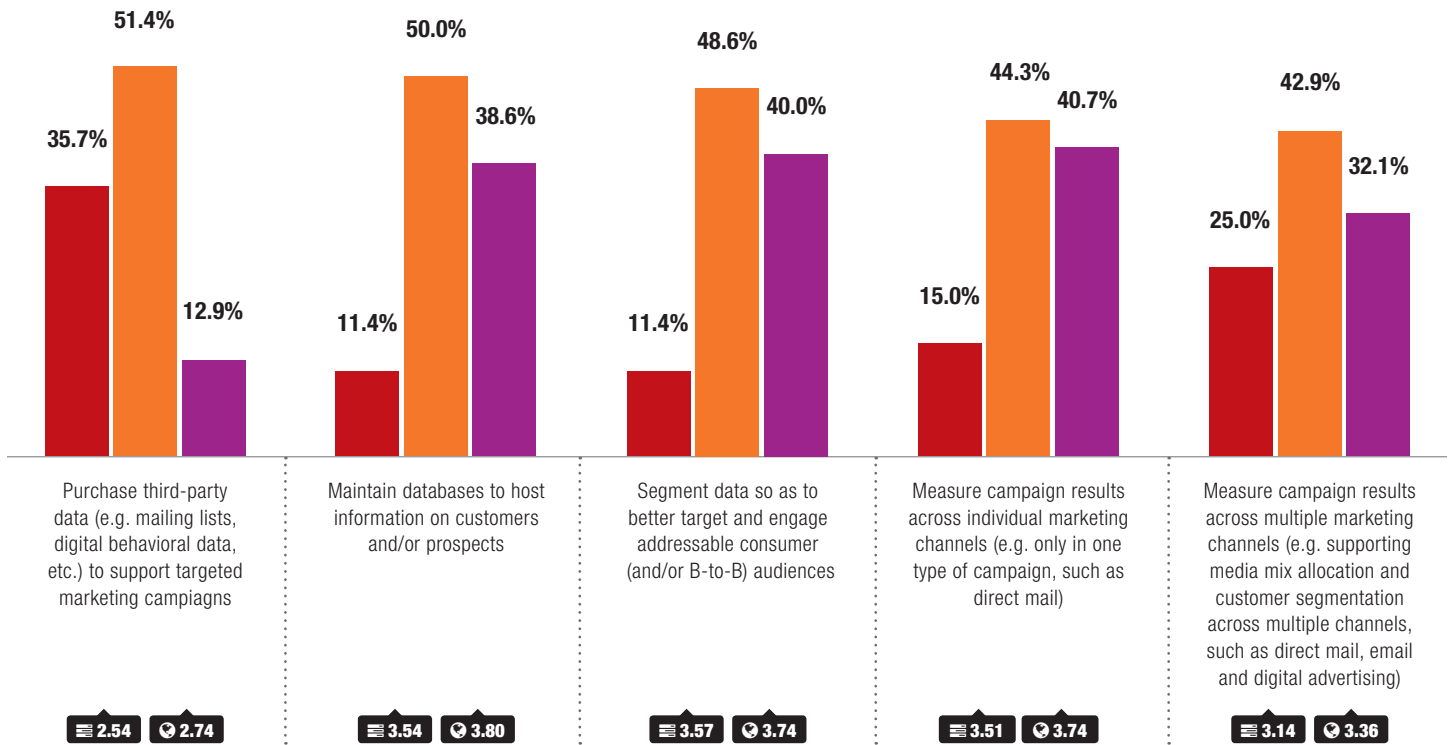


What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

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

Italy Index

Global Index

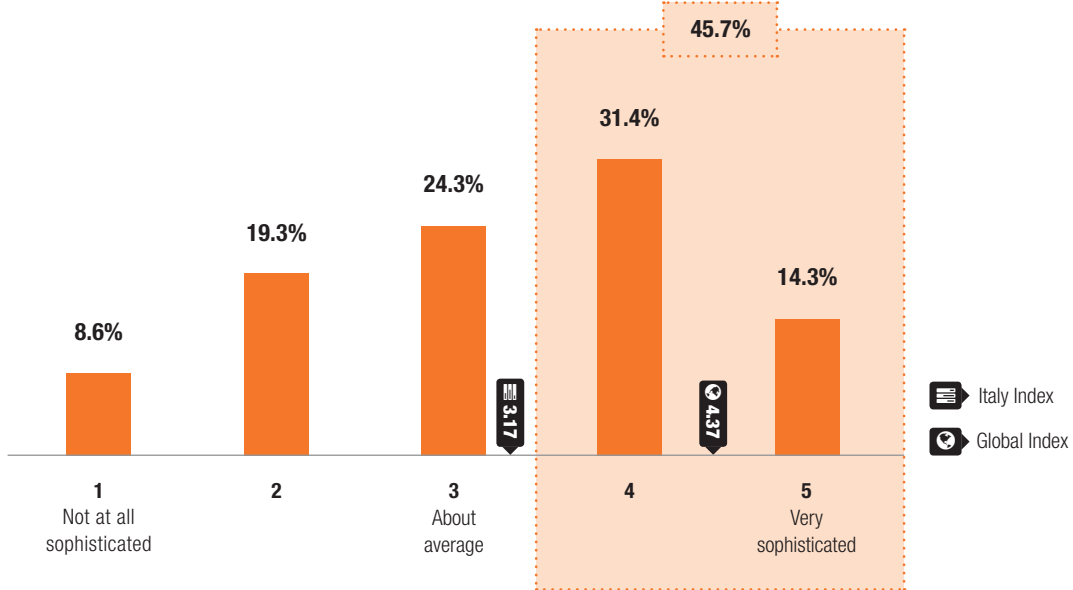
A NOTE ABOUT INDEX SCORES

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.

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DDMA SOPHISTICATION

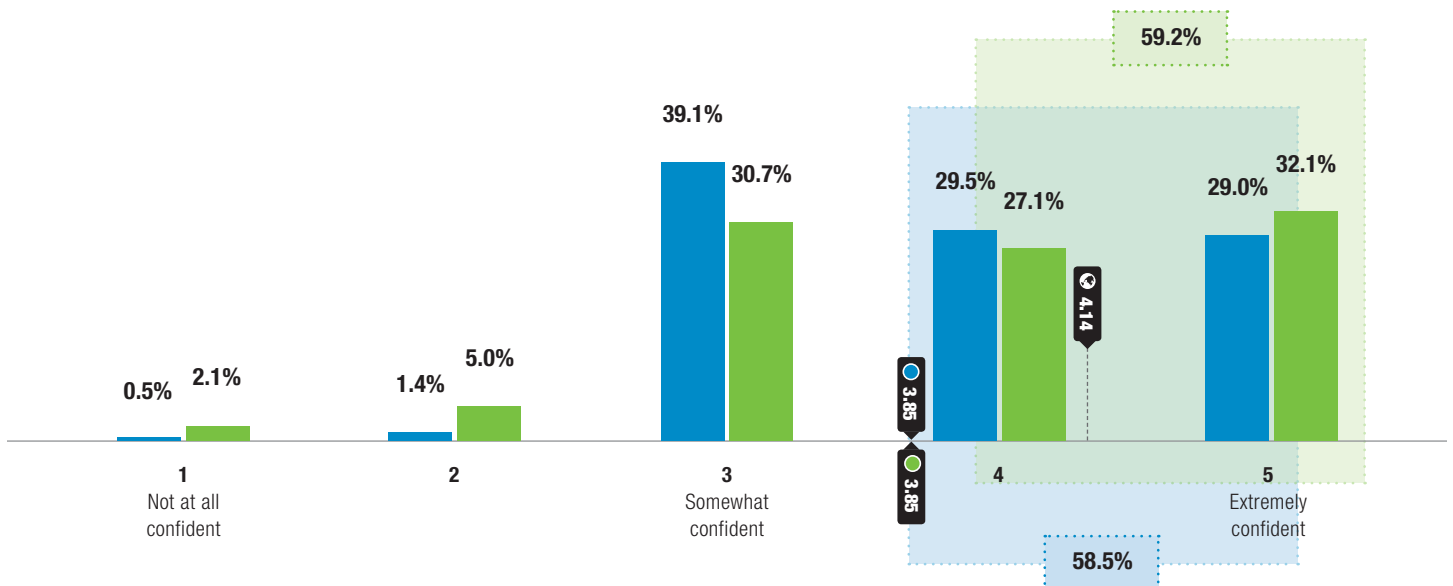
How sophisticated is your organization's data-driven marketing and advertising (DDMA) approach?



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?

● 2014 ● 2015 ■ Italy Index ■ Global Index (2015)

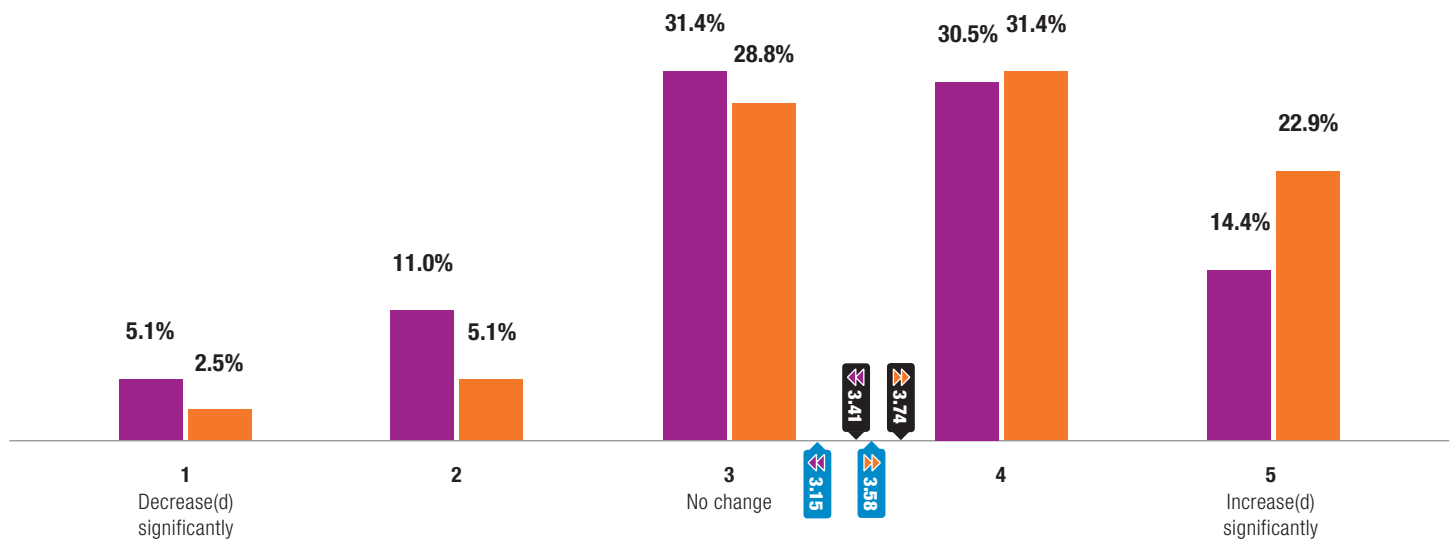


How are practitioners investing in DDMA? What returns are they generating?

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?

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

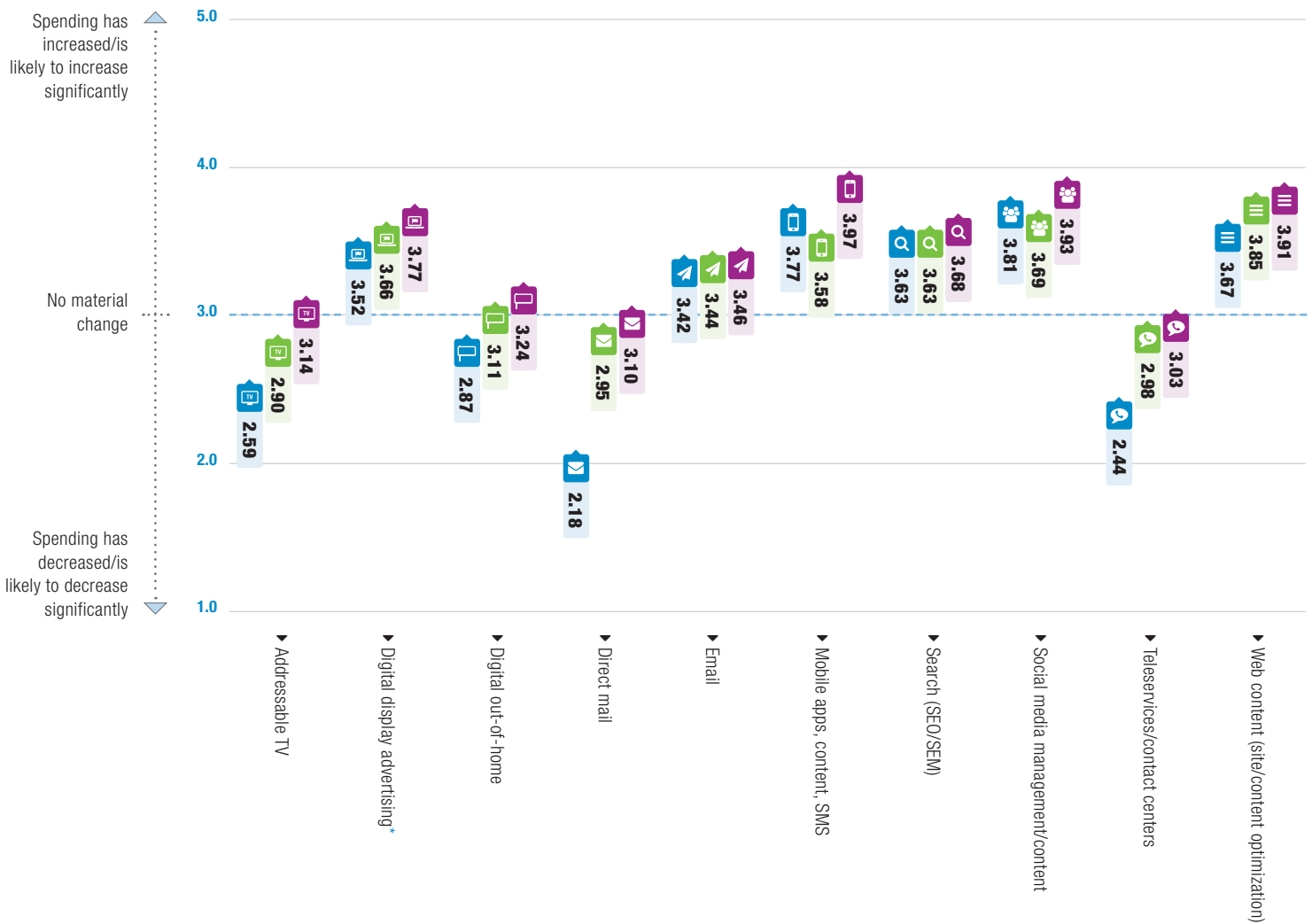


Note: Refer to page 16 of the 2015 *Global Review* for global averages

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?

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



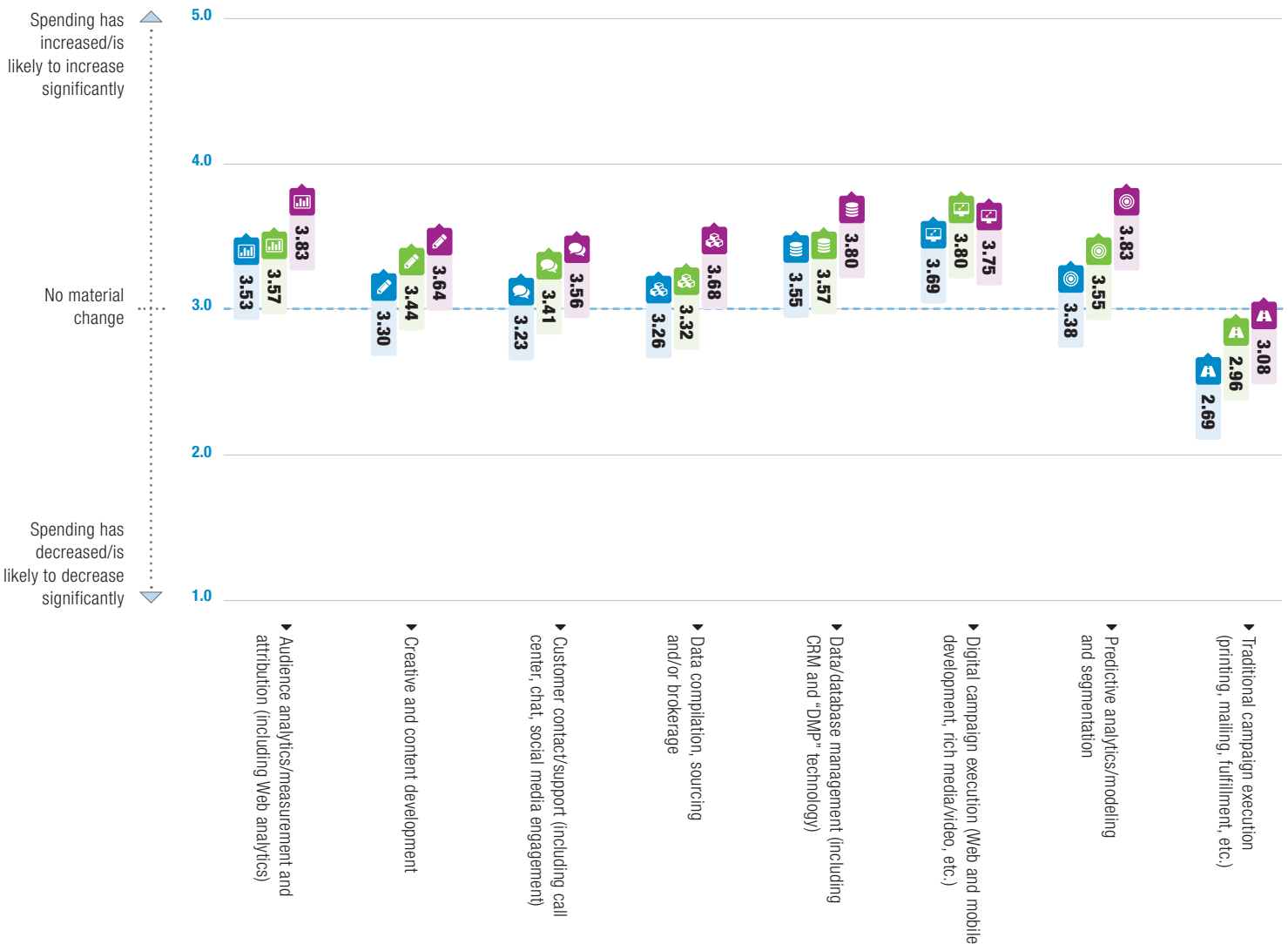
*Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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



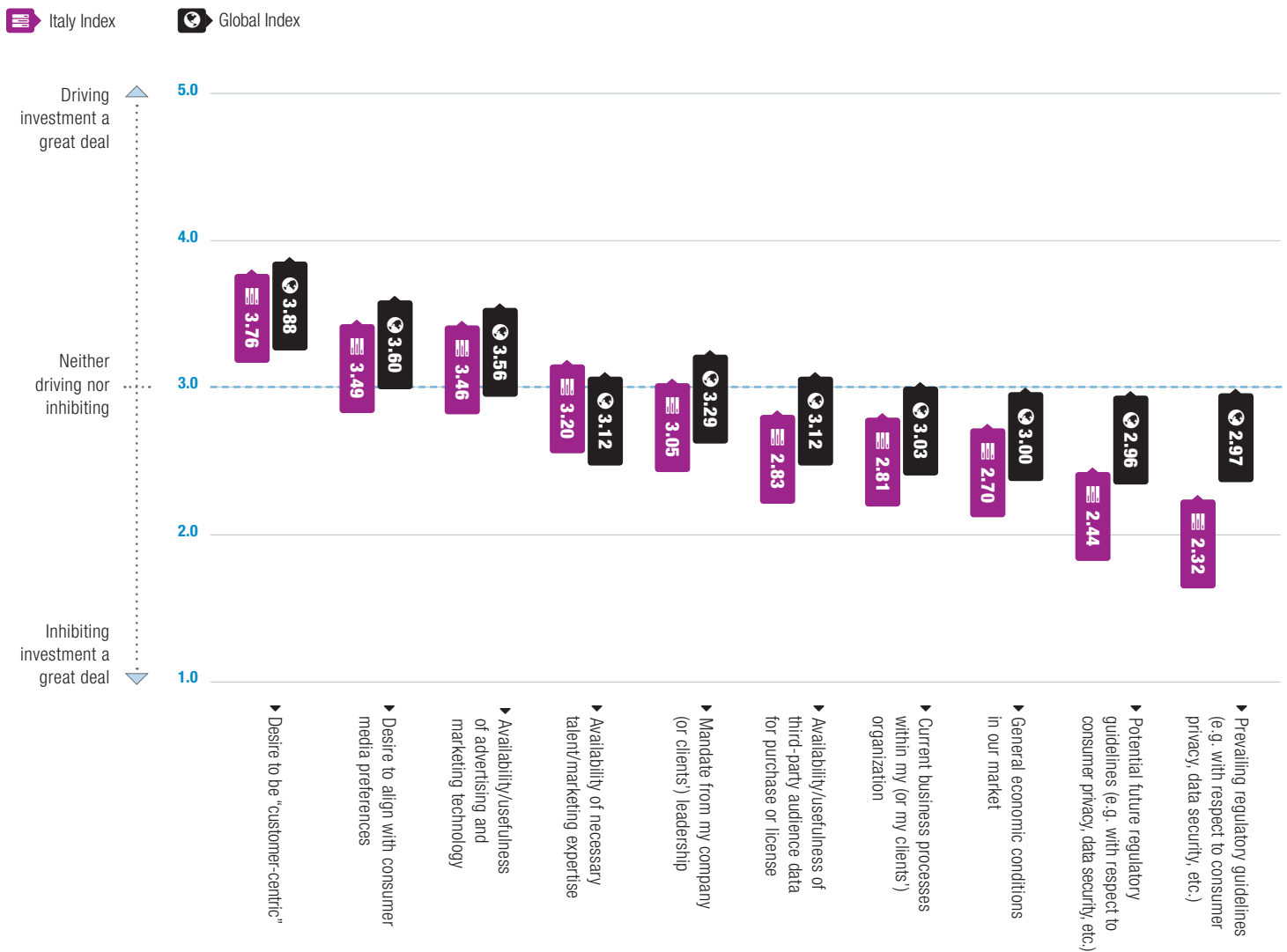
* Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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

What's driving the practice of DDMA? What's inhibiting it?

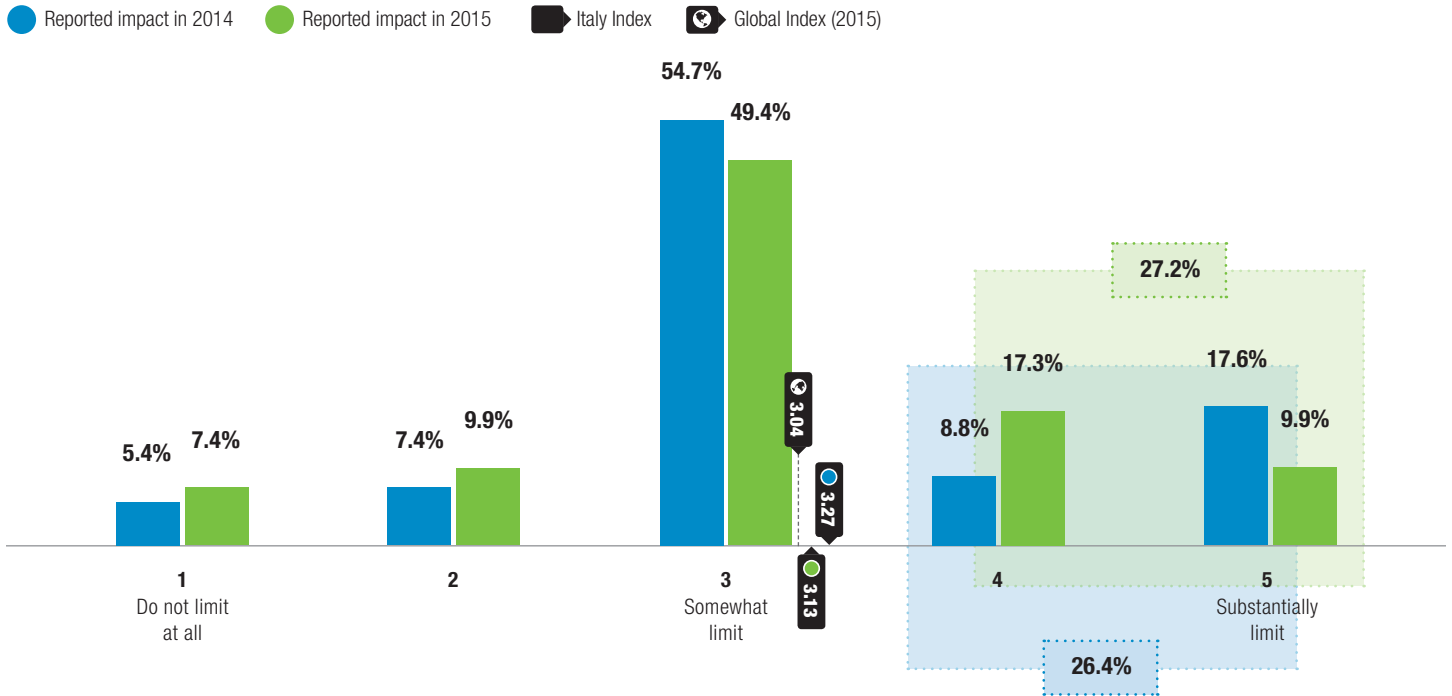
FACTORS DRIVING OR INHIBITING DDMA

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



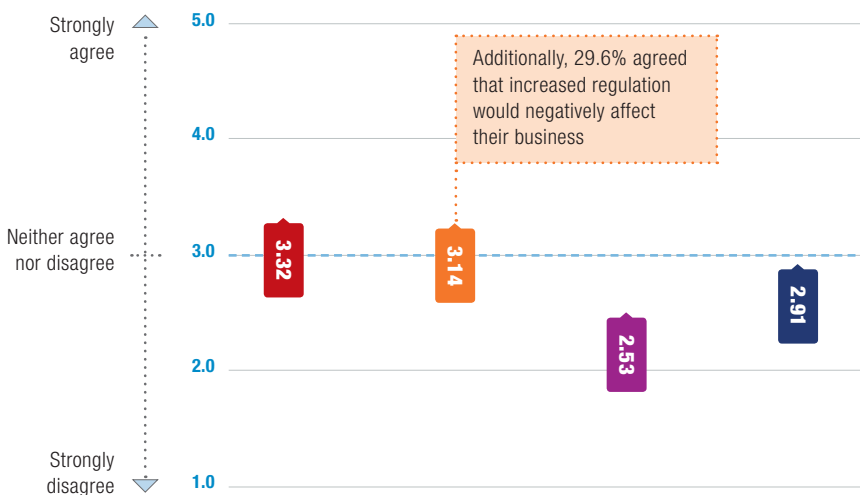
IMPACT OF REGULATION

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?



Netherlands





Netherlands

PANEL:
142 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY – SEPTEMBER 2015

* Not all respondents answered every question

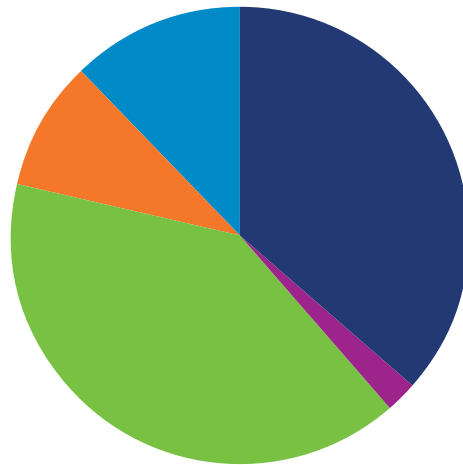
PRESENTING ASSOCIATION



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?

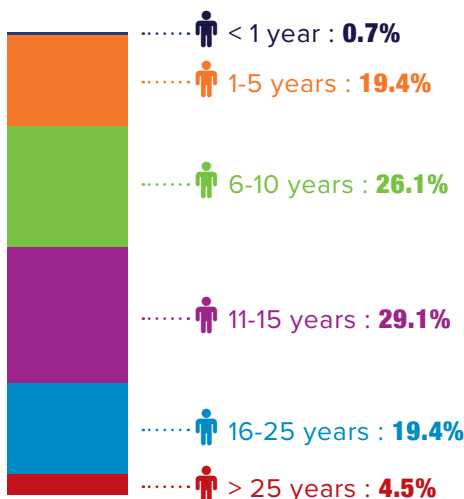


- **MARKETER/ADVERTISER : 36.6%**
- **PUBLISHER/MEDIA : 2.1%**
(focused on selling advertising)
- **PROVIDER OF MARKETING SERVICES : 40.1%**
(including data and agency services)
- **DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY : 9.2%**
- **OTHER : 12.0%**

EXPERIENCE

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

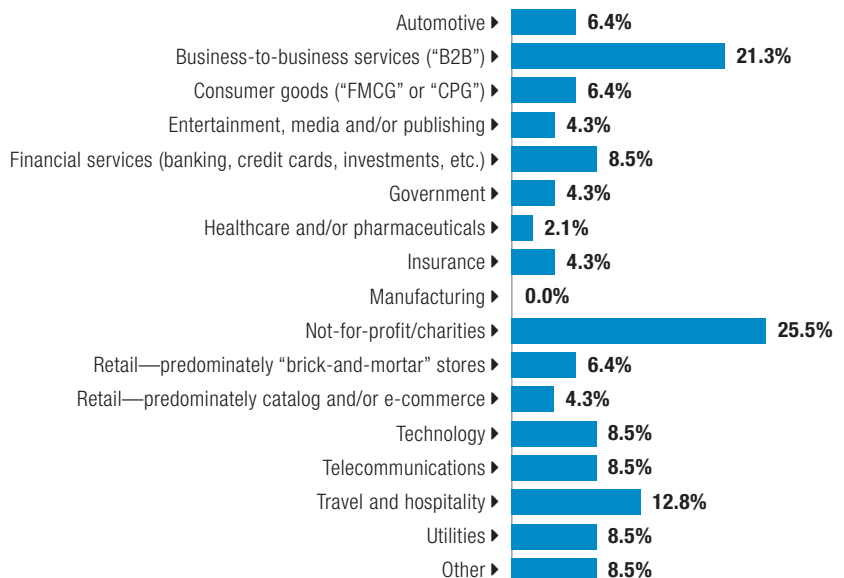
Please consider your current job and past professional roles that may apply.



INDUSTRY REPRESENTATION

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

Displaying panelists' "top three" responses

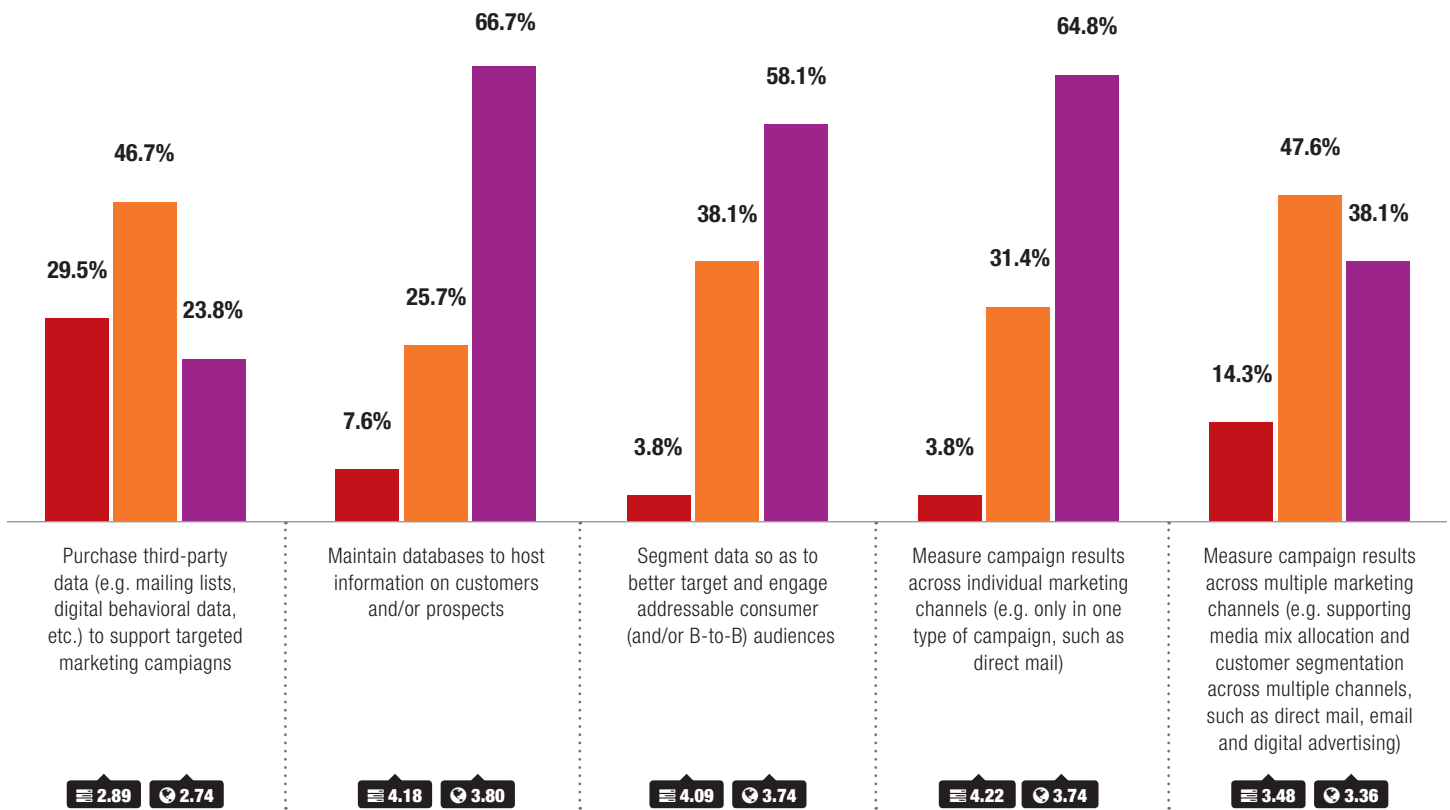


What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

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

☰ Netherlands Index

🌐 Global Index

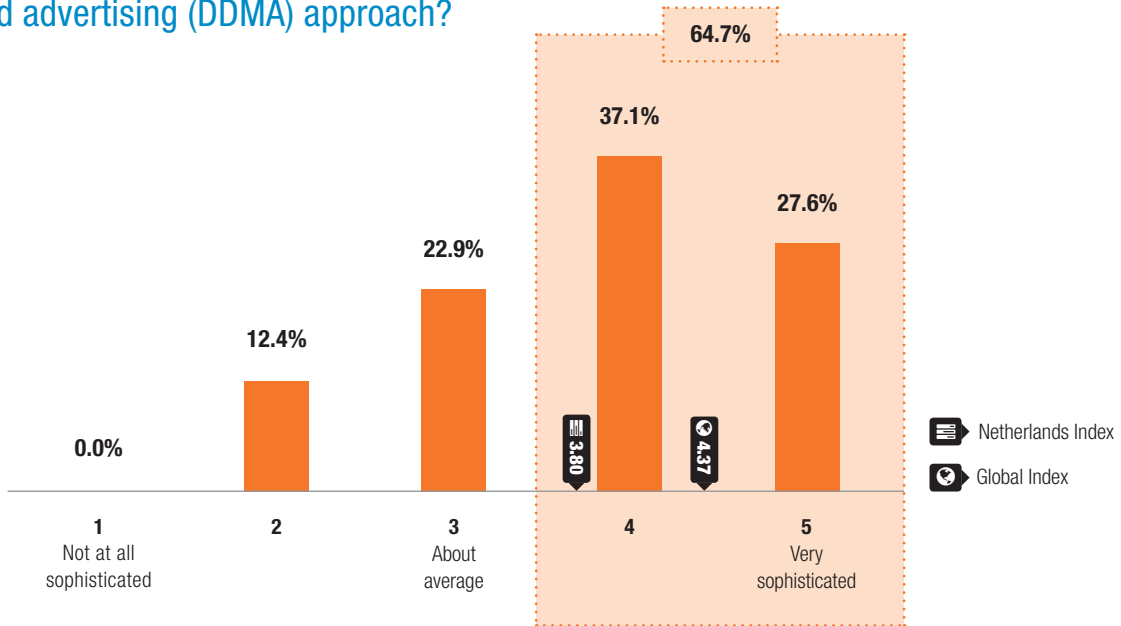
A NOTE ABOUT INDEX SCORES

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DDMA SOPHISTICATION

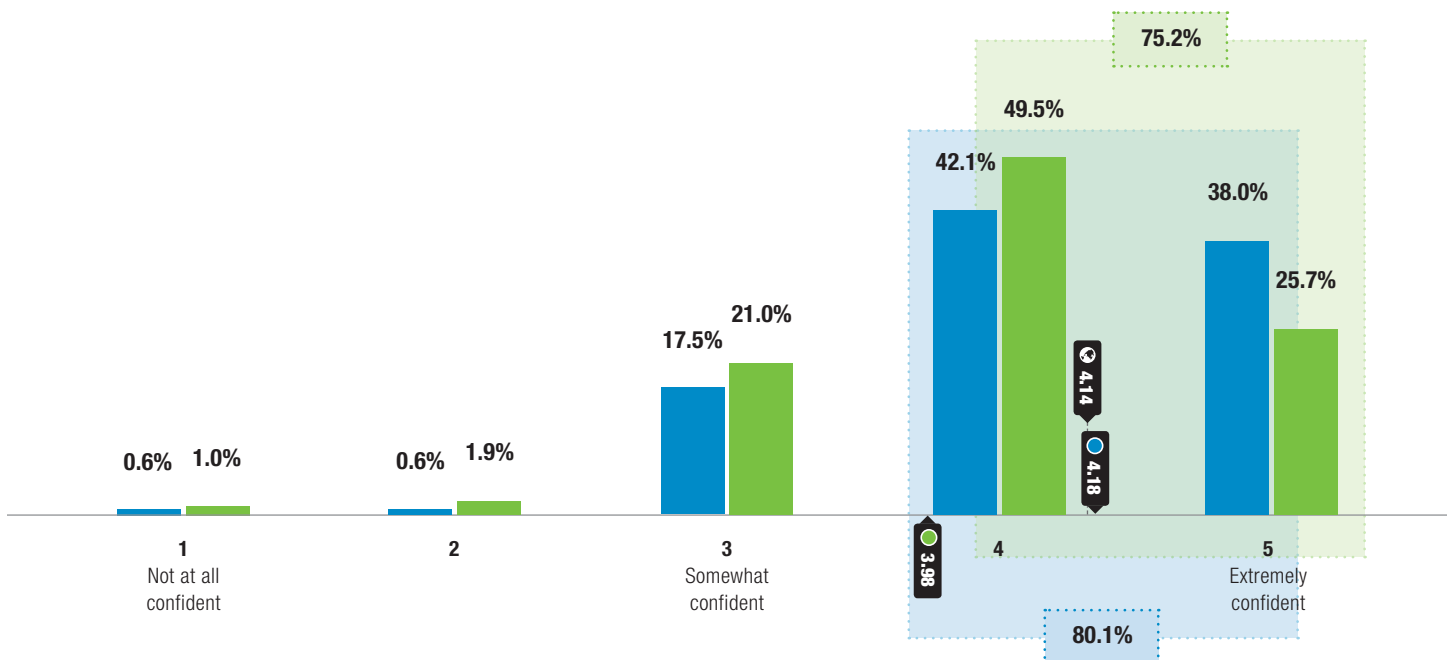
How sophisticated is your organization's data-driven marketing and advertising (DDMA) approach?



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?

● 2014 ● 2015 ■ Netherlands Index ■ Global Index (2015)

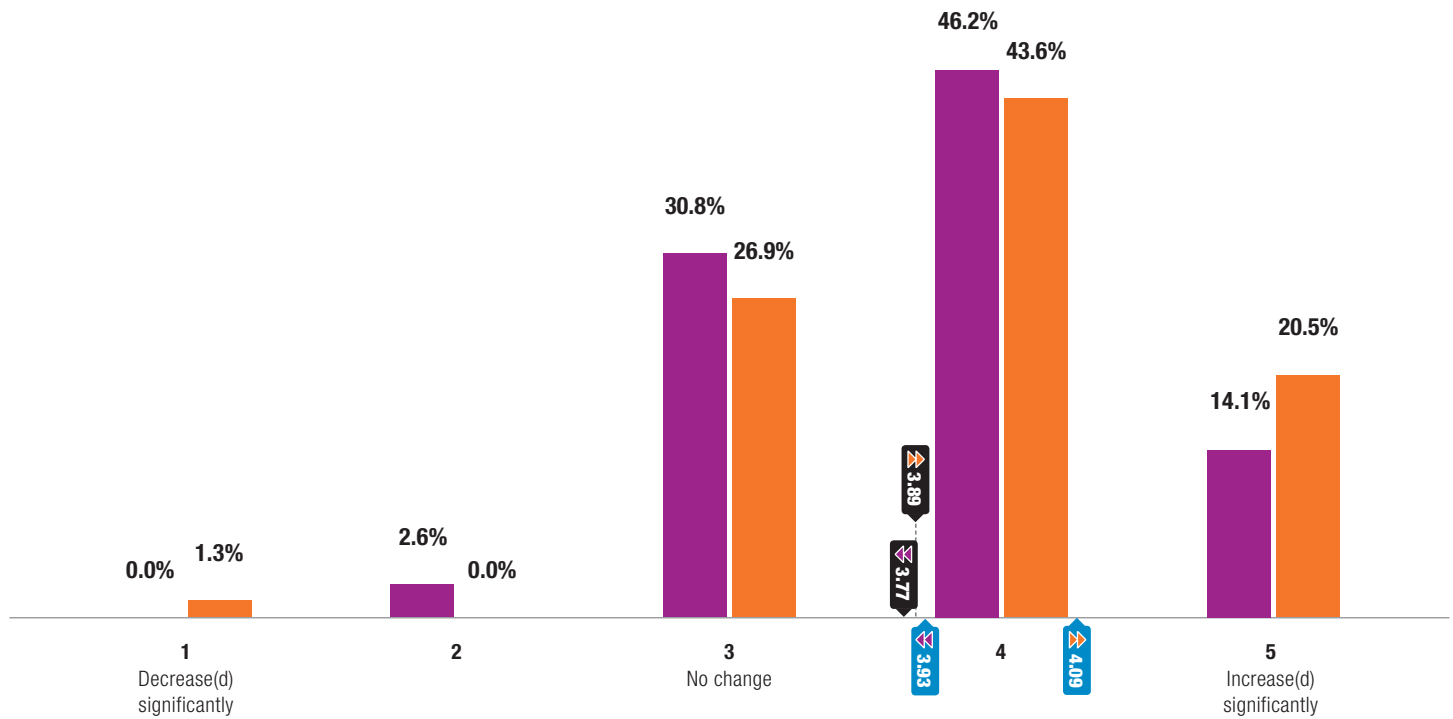


How are practitioners investing in DDMA? What returns are they generating?

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**?

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

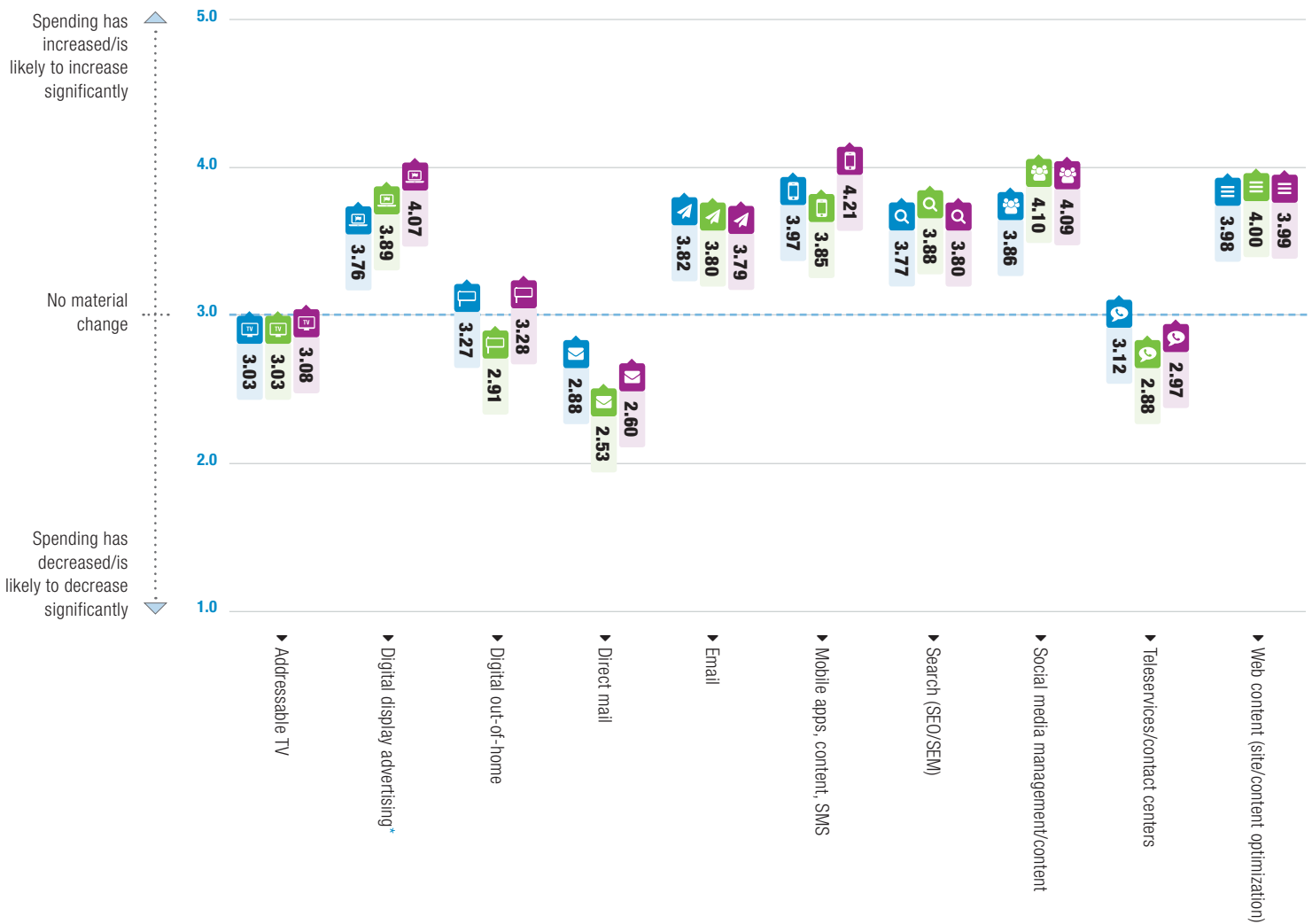


Note: Refer to page 16 of the 2015 *Global Review* for global averages

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?

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



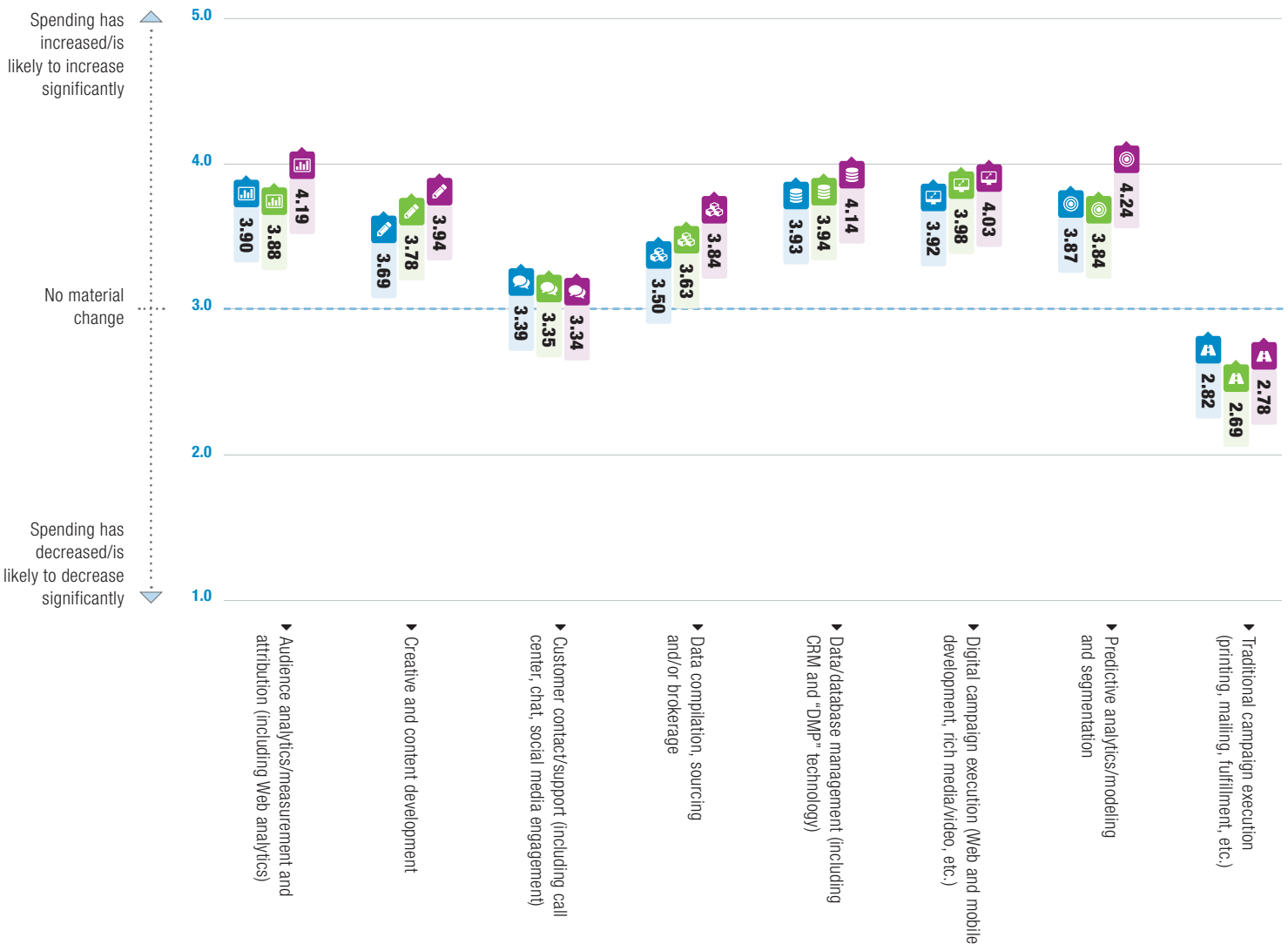
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Note: Refer to page 17 of the 2015 *Global Review* for global averages

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

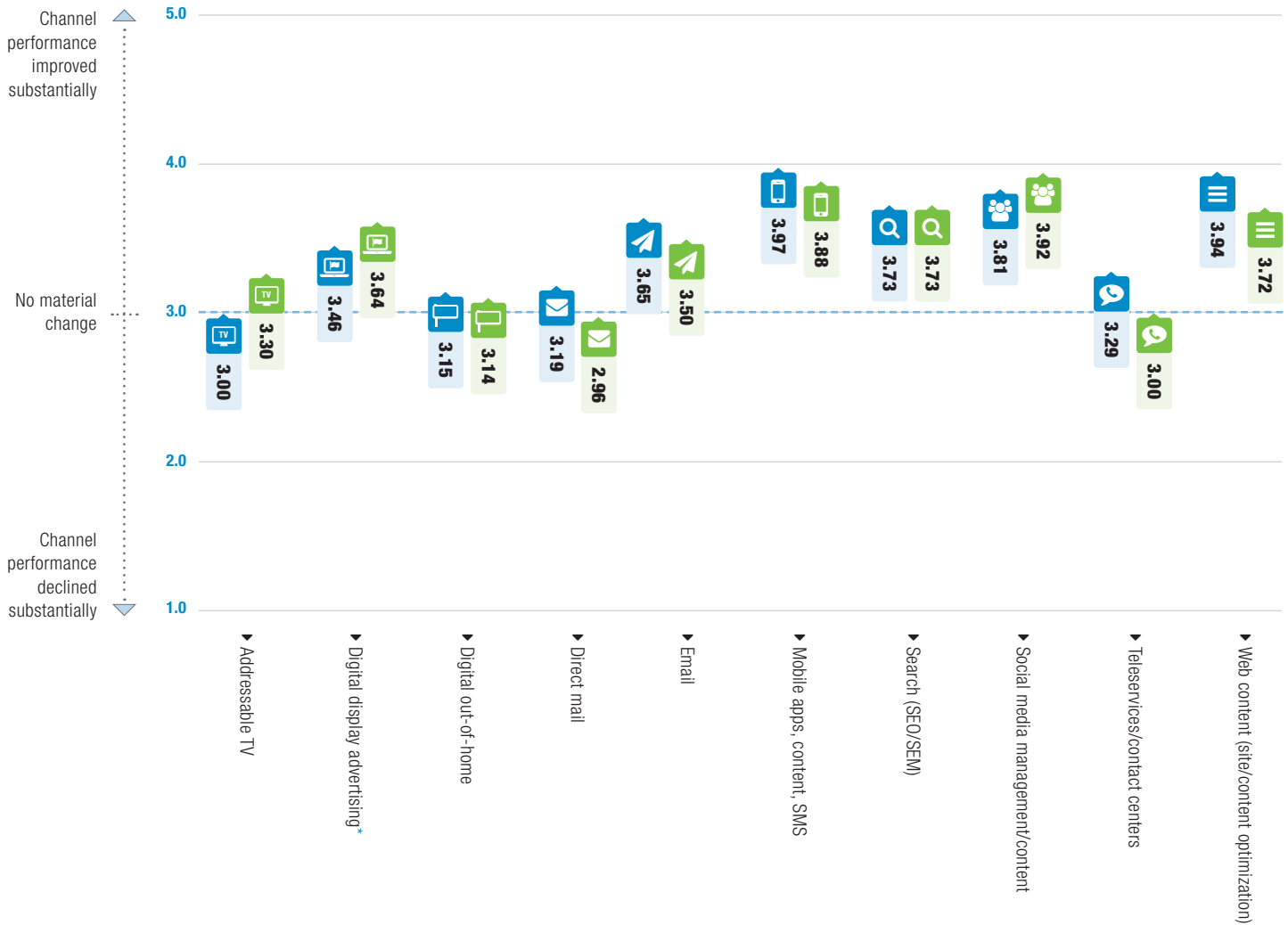


Note: Refer to page 18 of the 2015 *Global Review* for global averages

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



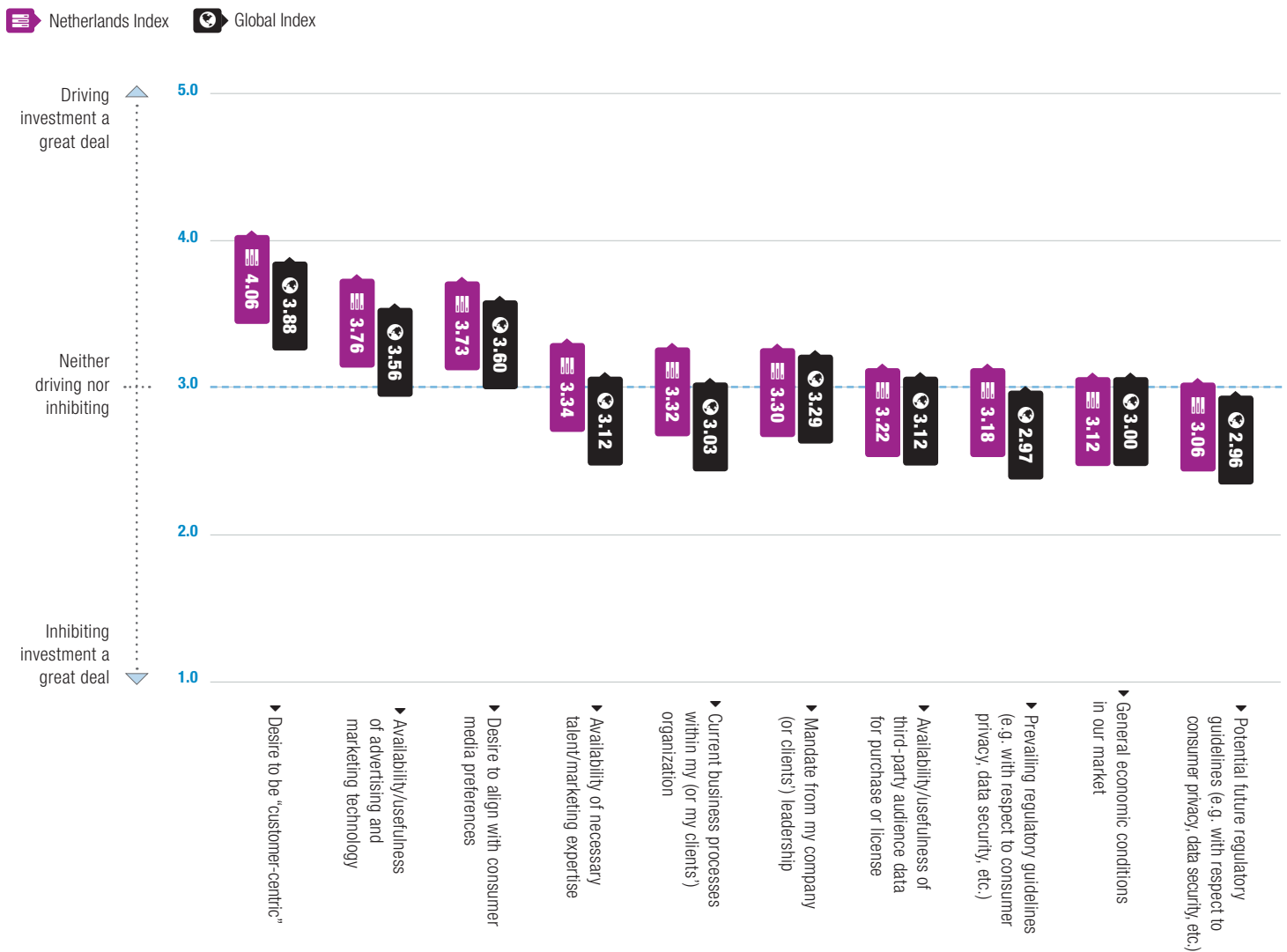
* Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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

What's driving the practice of DDMA? What's inhibiting it?

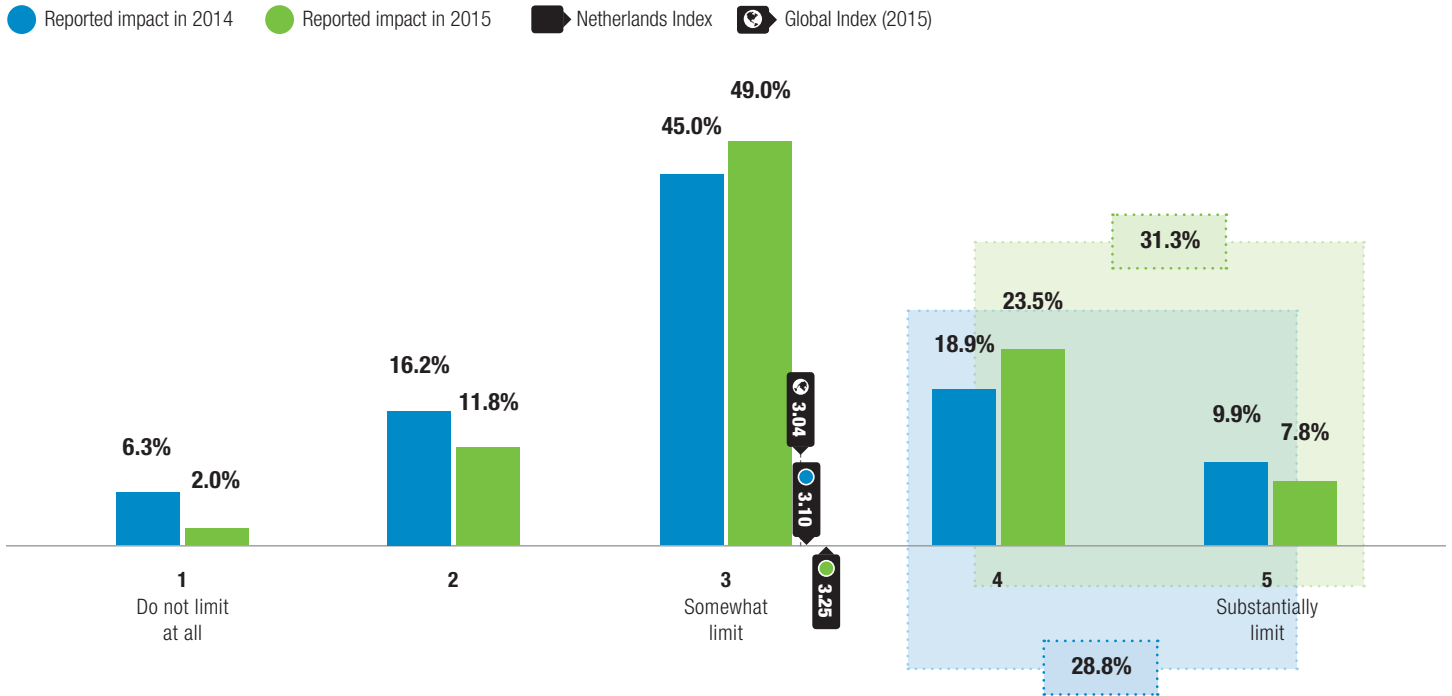
FACTORS DRIVING OR INHIBITING DDMA

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



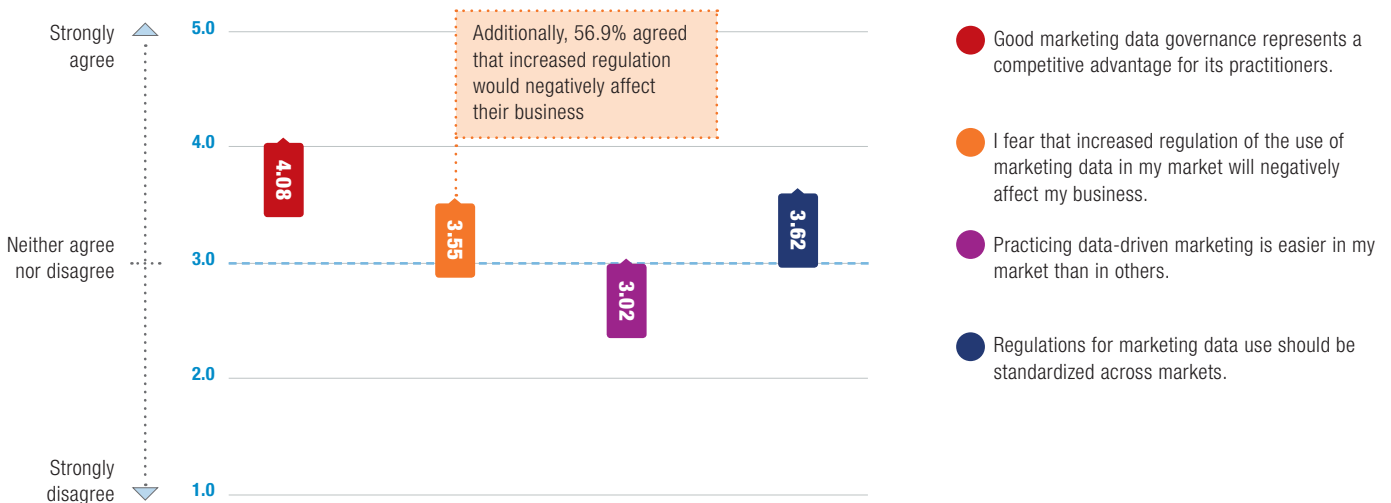
IMPACT OF REGULATION

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?



New Zealand





New Zealand

PANEL:
28 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY – SEPTEMBER 2015

* Not all respondents answered every question

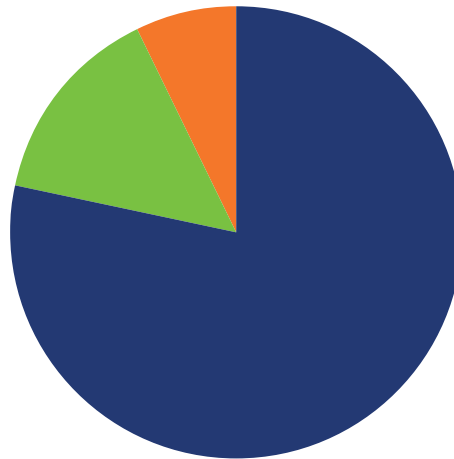
PRESENTING ASSOCIATION



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?

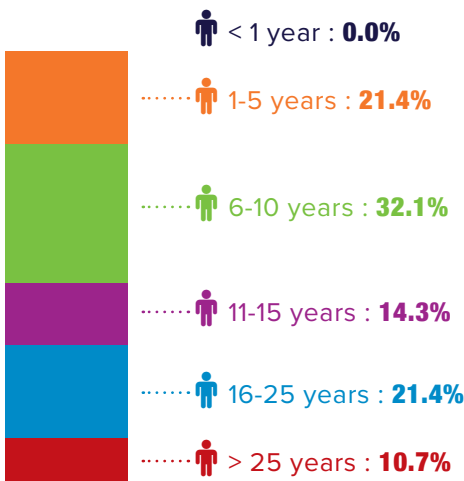


- **MARKETER/ADVERTISER : 78.6%**
- **PUBLISHER/MEDIA : 0.0%**
(focused on selling advertising)
- **PROVIDER OF MARKETING SERVICES : 14.3%**
(including data and agency services)
- **DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY : 7.1%**
- **OTHER : 0.0%**

EXPERIENCE

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

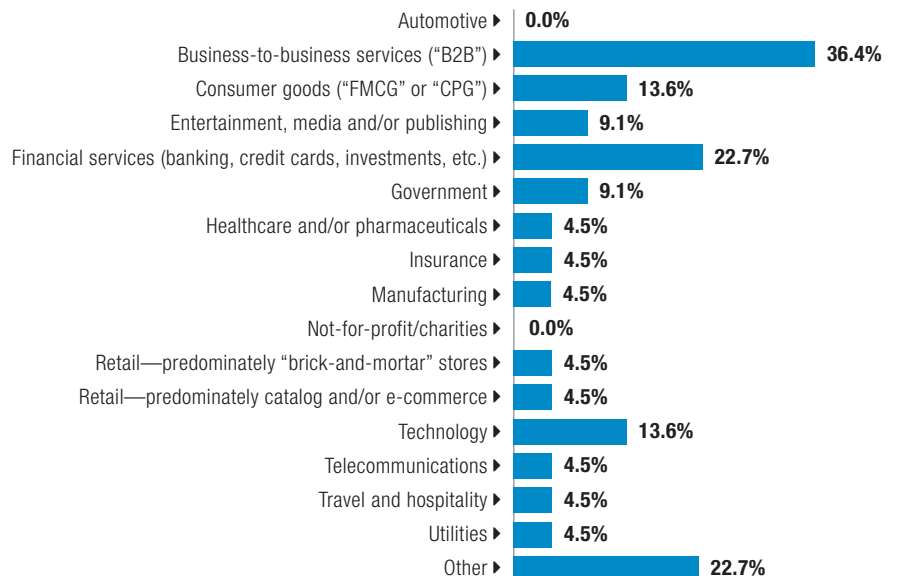
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INDUSTRY REPRESENTATION

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

Displaying panelists’ “top three” responses

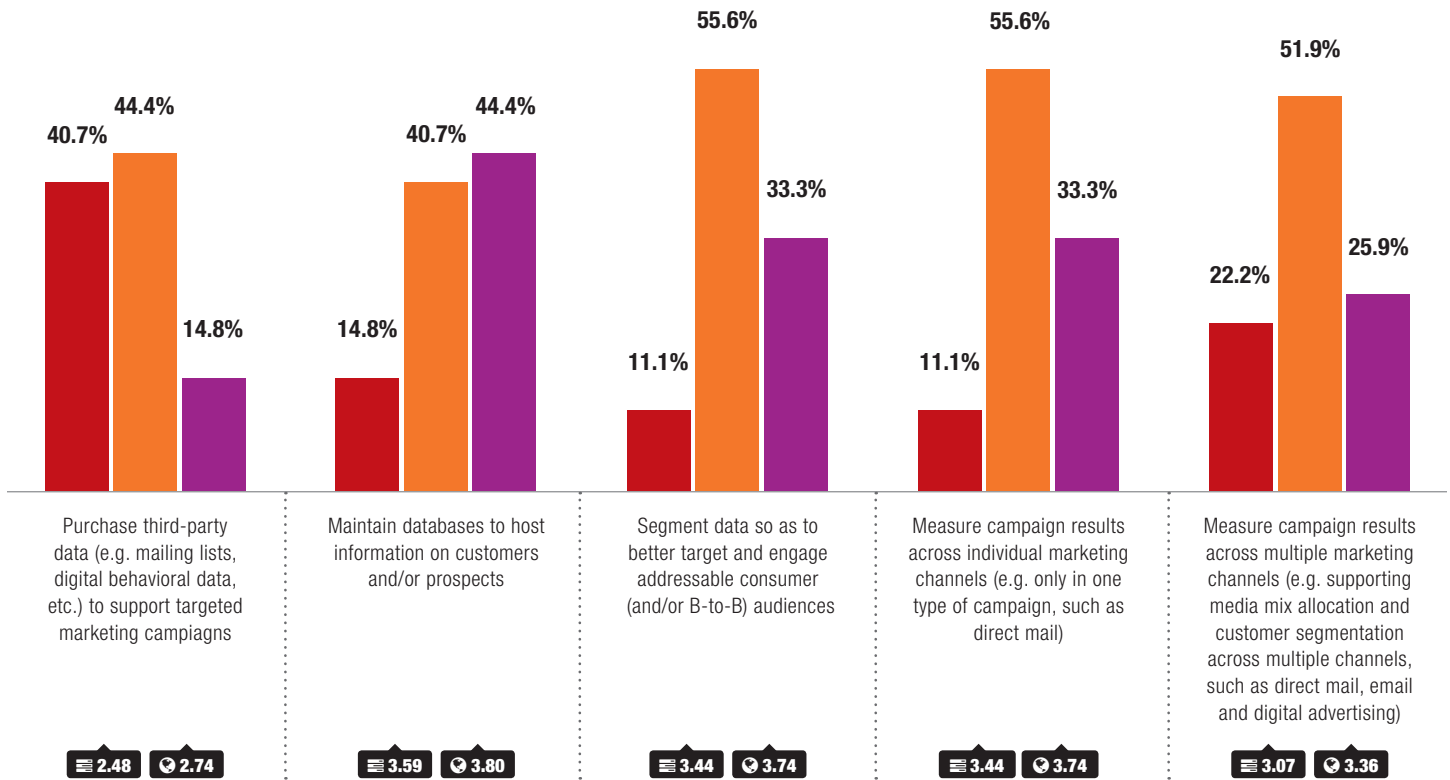


What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

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

New Zealand Index

Global Index

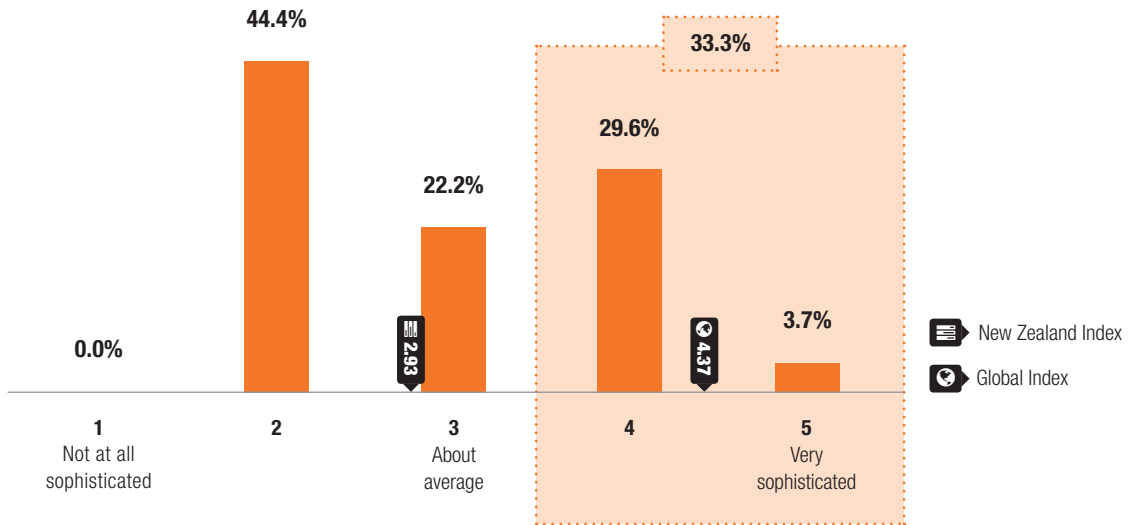
A NOTE ABOUT INDEX SCORES

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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

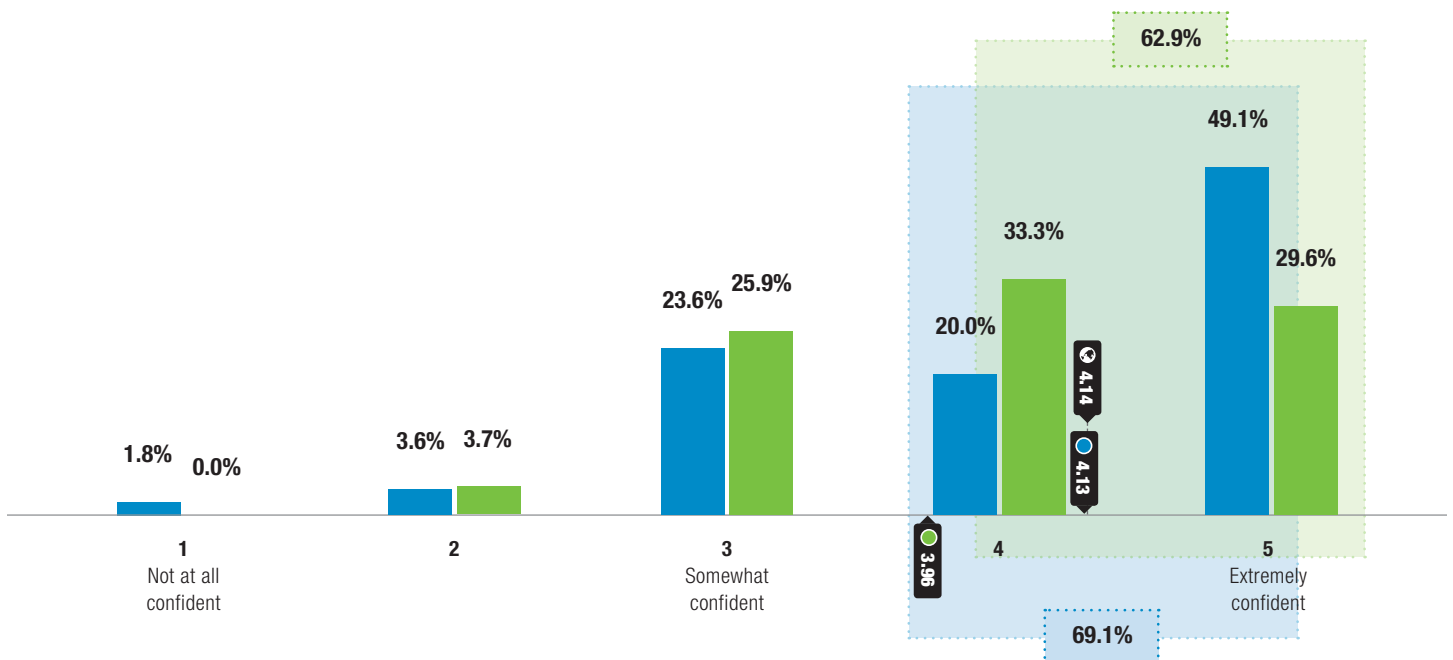
How sophisticated is your organization's data-driven marketing and advertising (DDMA) approach?



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?

● 2014 ● 2015 ■ New Zealand Index 🌐 Global Index (2015)

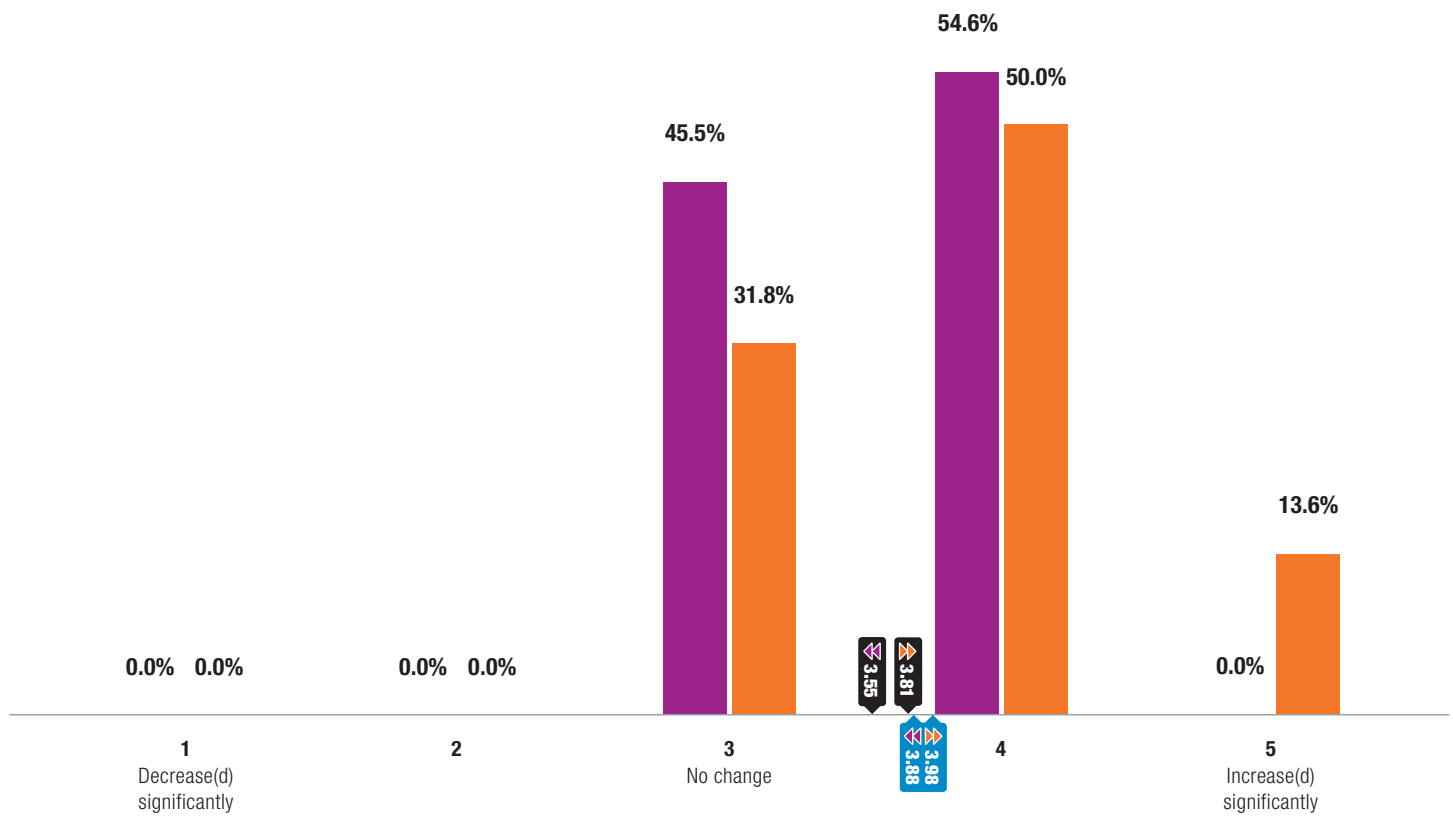


How are practitioners investing in DDMA? What returns are they generating?

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?

◀ The past year
 ▶ The coming year
 ▶ New Zealand Index (2014)
 ▶ New Zealand Index (2015)

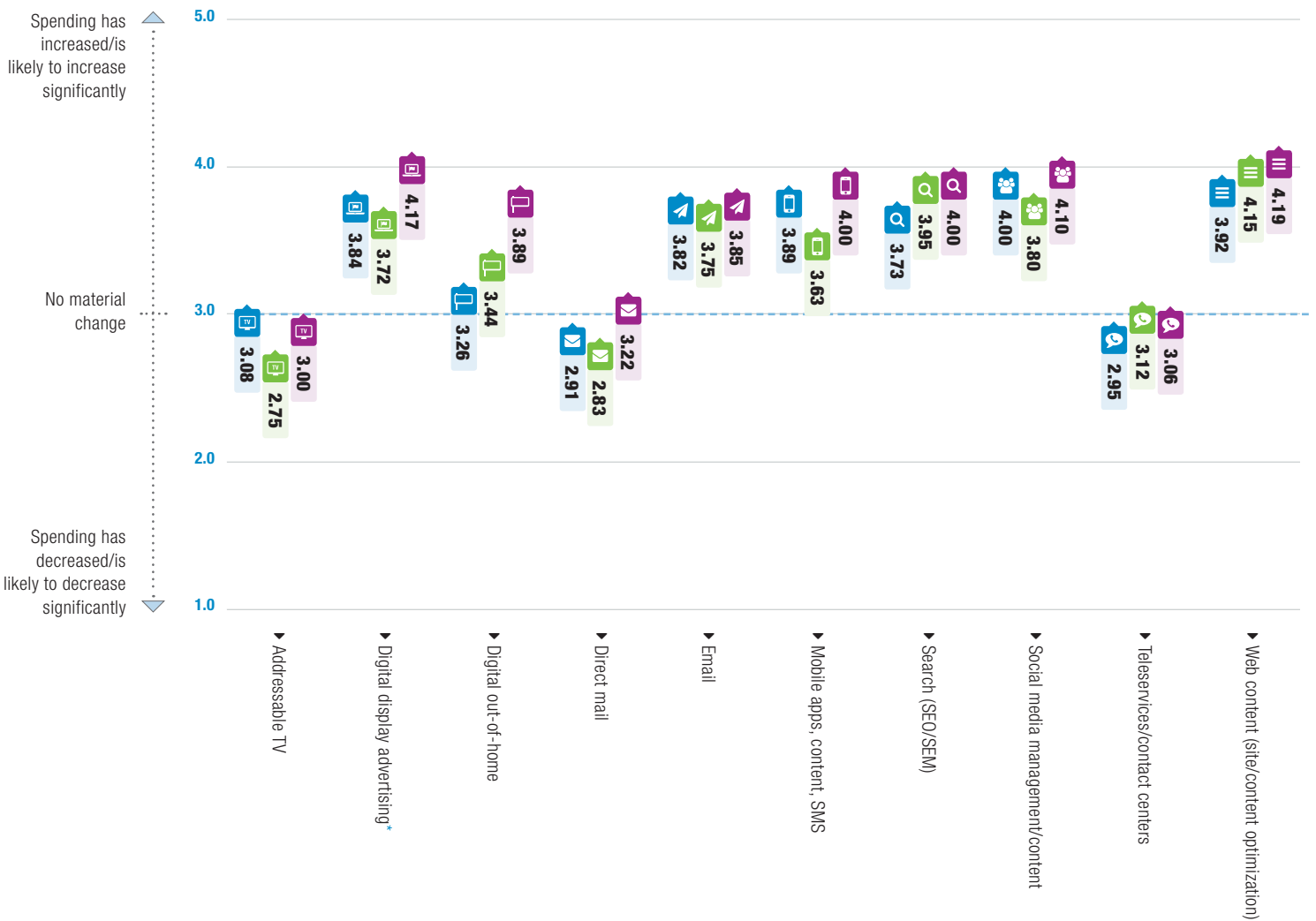


Note: Refer to page 16 of the 2015 *Global Review* for global averages

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



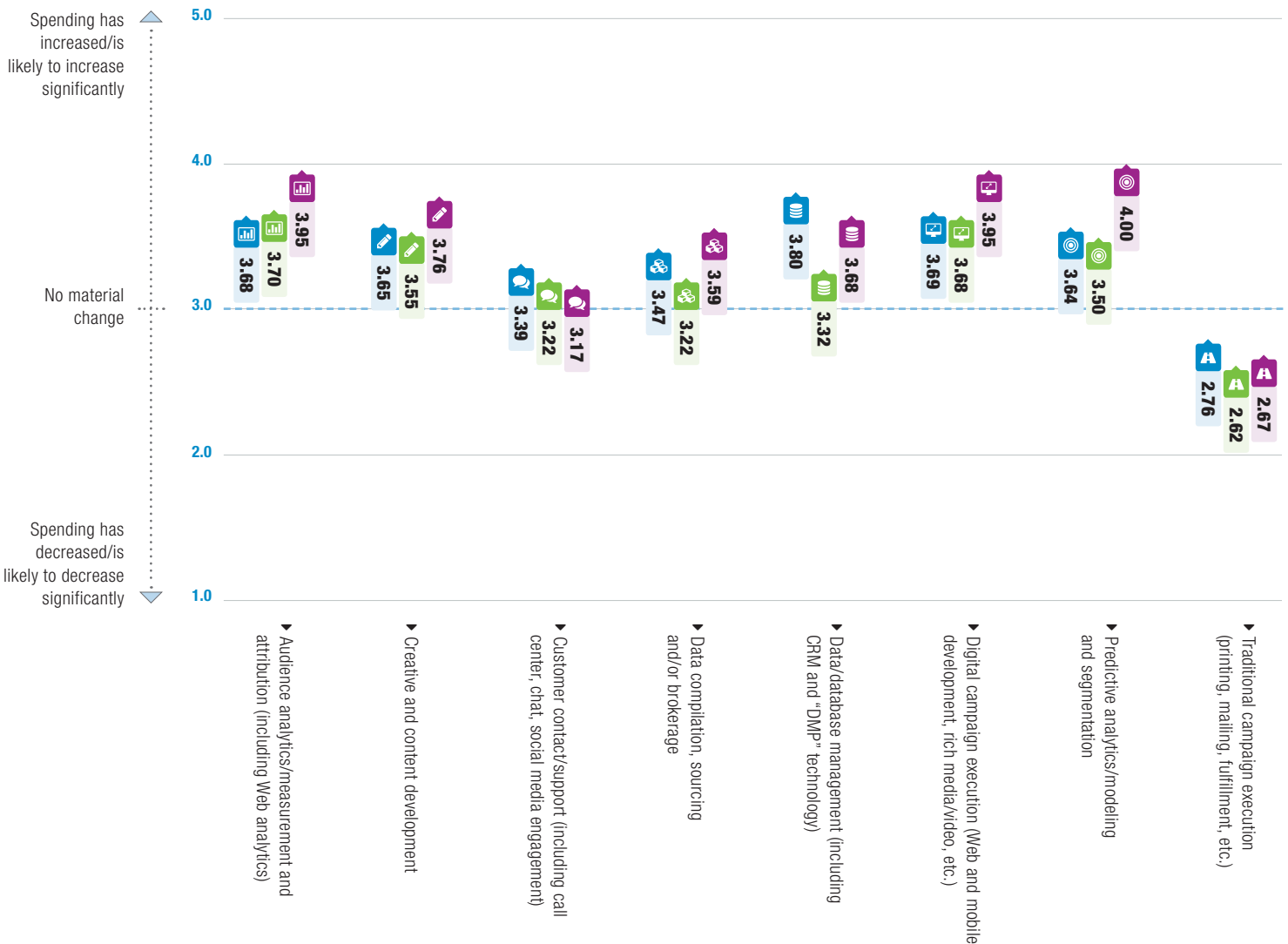
*Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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

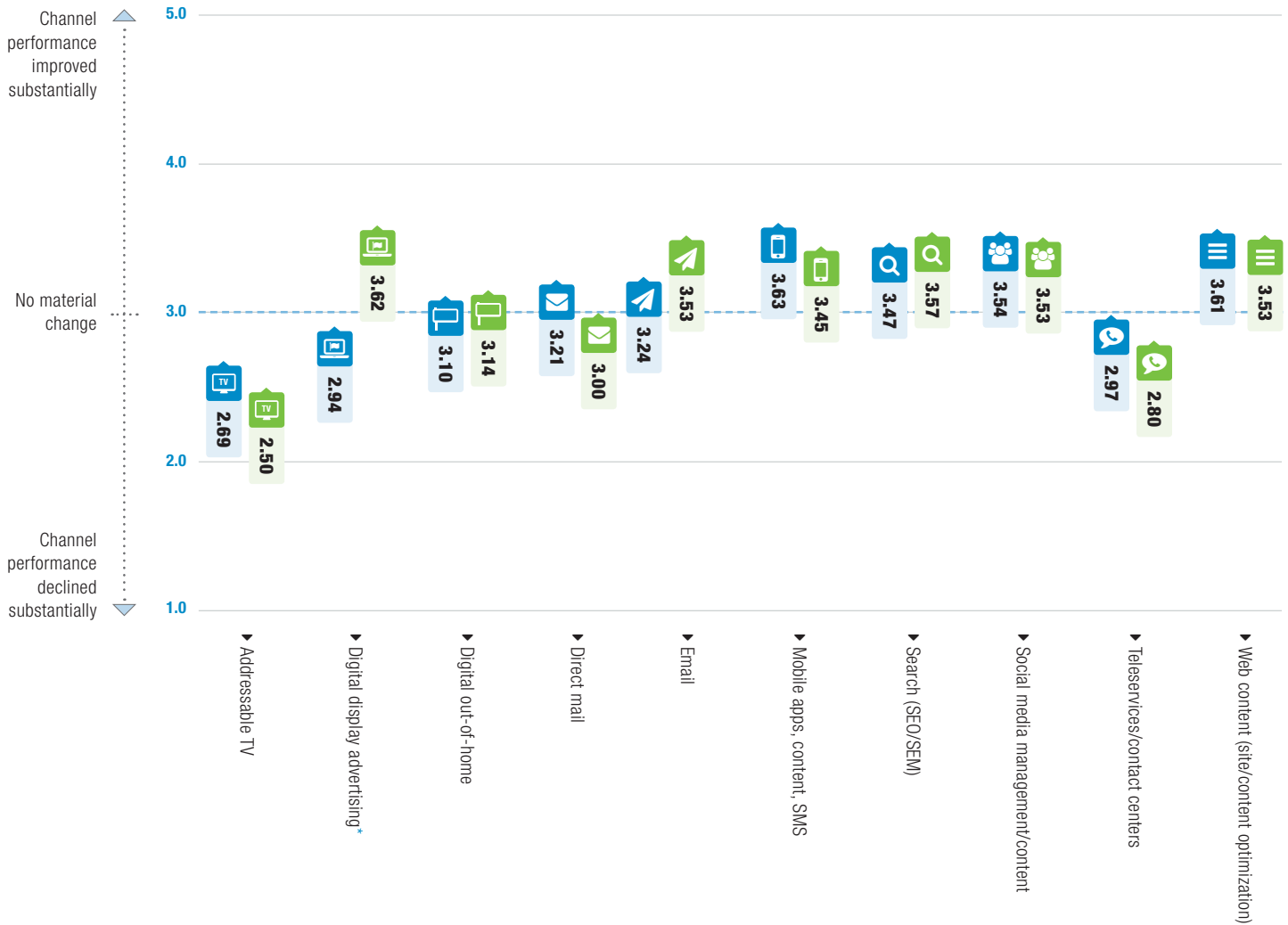


Note: Refer to page 18 of the 2015 *Global Review* for global averages

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



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

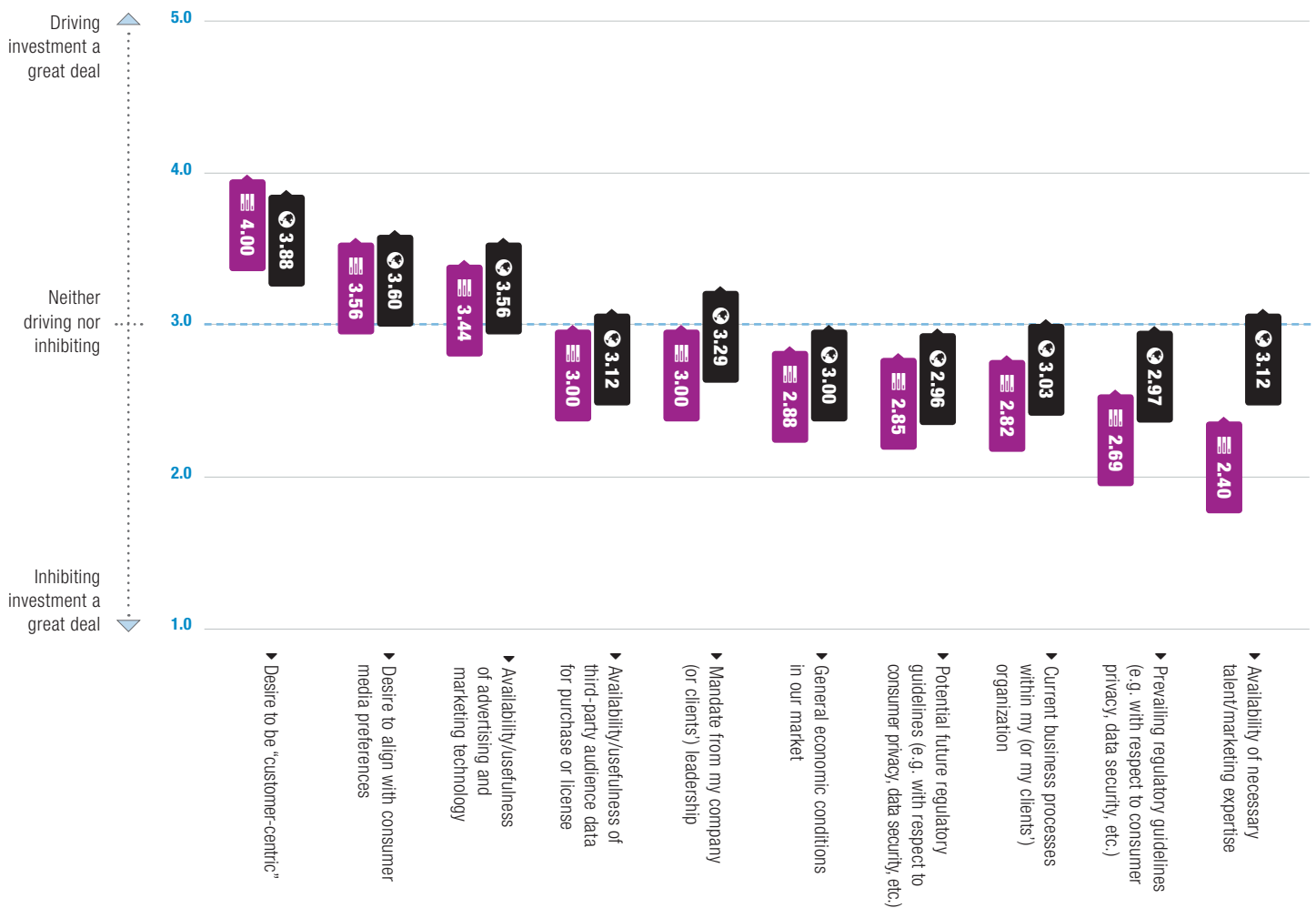
Note: Refer to page 19 of the 2015 *Global Review* for global averages

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?

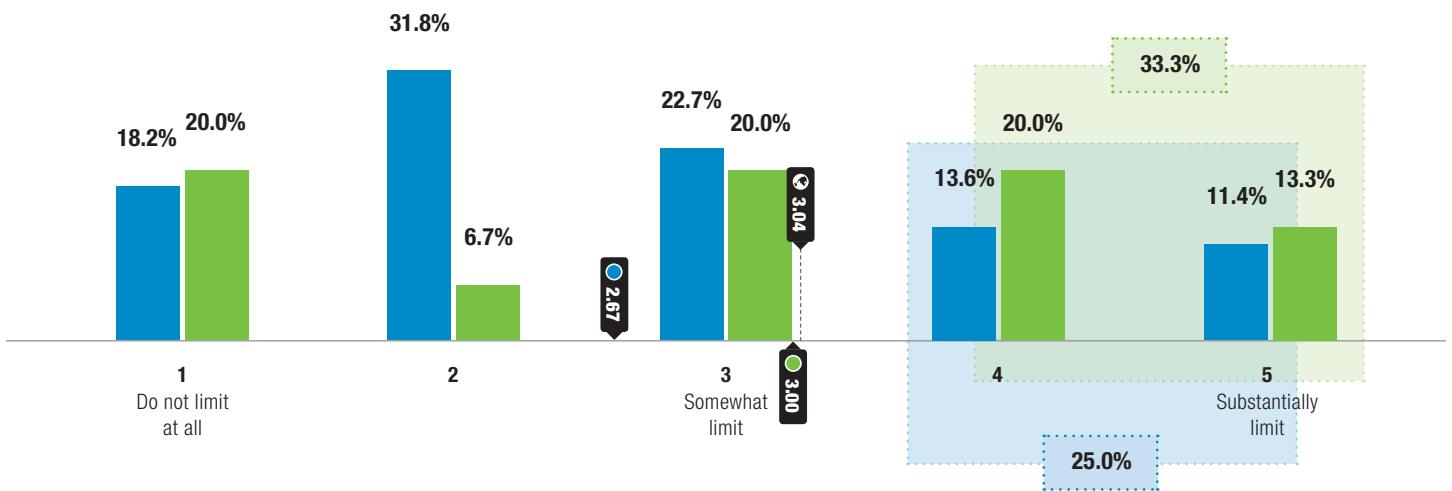
New Zealand Index Global Index



IMPACT OF REGULATION

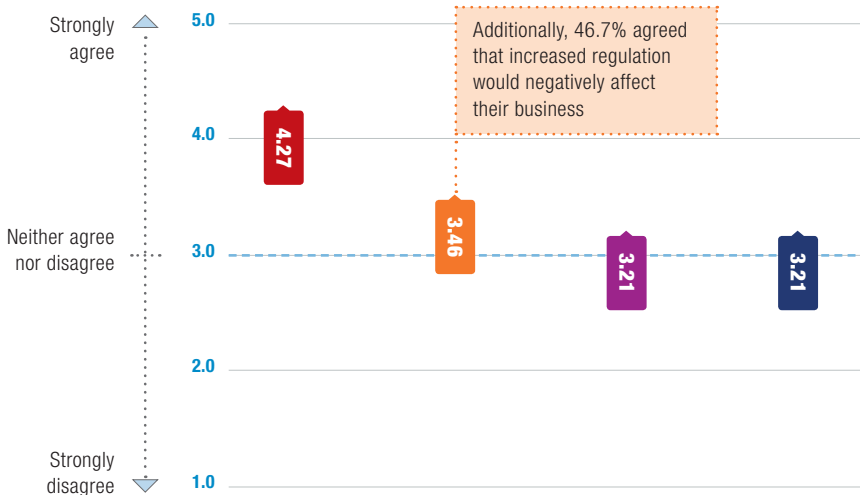
To what extent are regulatory barriers in your marketplace (e.g. limits on access to data, requirements for affirmative consumer opt-in to marketing communications, etc.) actively limiting your ability to pursue data-driven marketing and advertising initiatives?

● Reported impact in 2014 ● Reported impact in 2015 🇳🇿 New Zealand Index 🌐 Global Index (2015)



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.

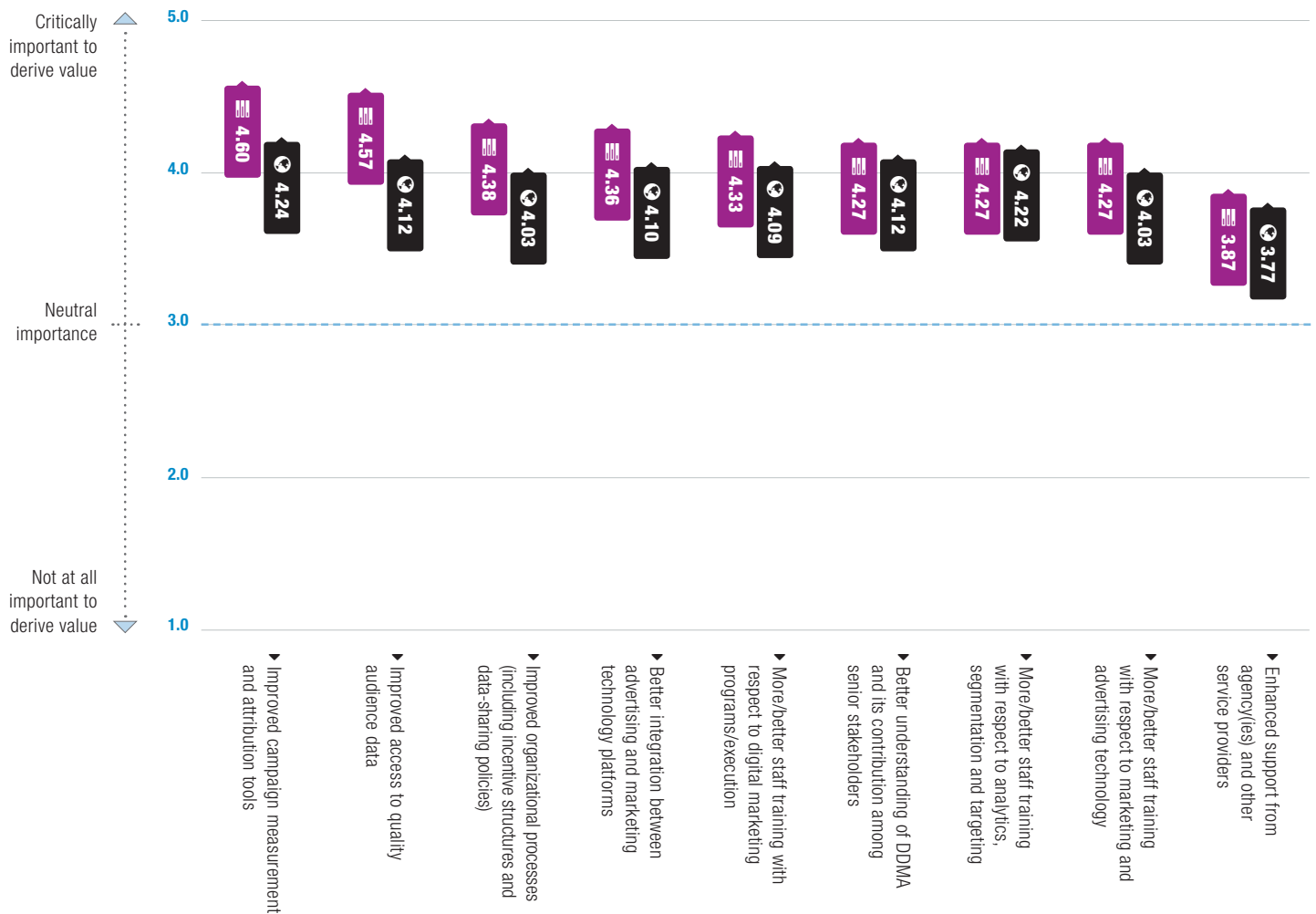
Note: Refer to page 23 of the 2015 Global Review for global averages

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?

New Zealand Index Global Index



Singapore





Singapore

PANEL:
22 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY – SEPTEMBER 2015

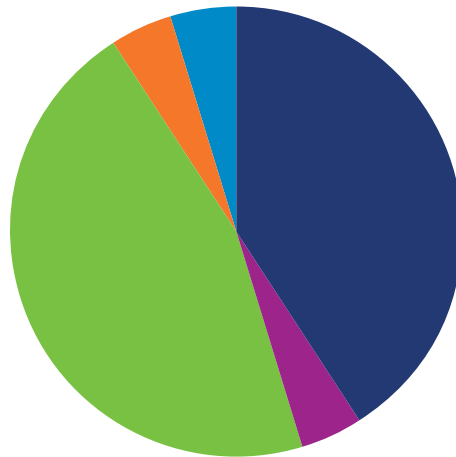
* Not all respondents answered every question

PRESENTING ASSOCIATION: **DMAS**
DIRECT MARKETING 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?

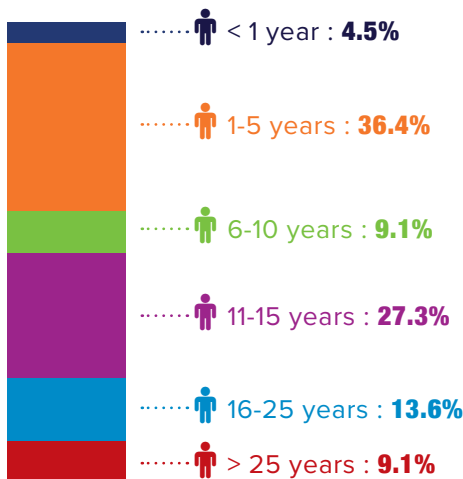


- MARKETER/ADVERTISER : **40.9%**
- PUBLISHER/MEDIA : **4.5%**
(focused on selling advertising)
- PROVIDER OF MARKETING SERVICES : **45.5%**
(including data and agency services)
- DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY : **4.5%**
- OTHER : **4.5%**

EXPERIENCE

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

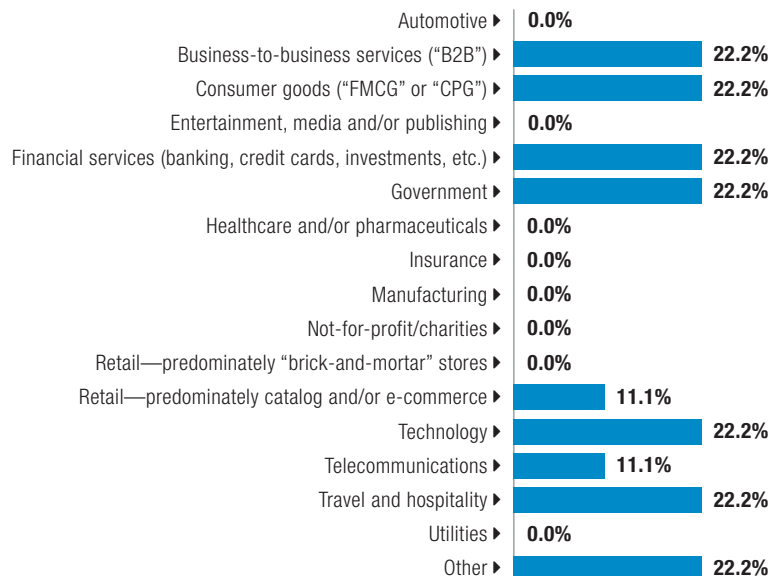
Please consider your current job and past professional roles that may apply.



INDUSTRY REPRESENTATION

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

Displaying panelists' "top three" responses

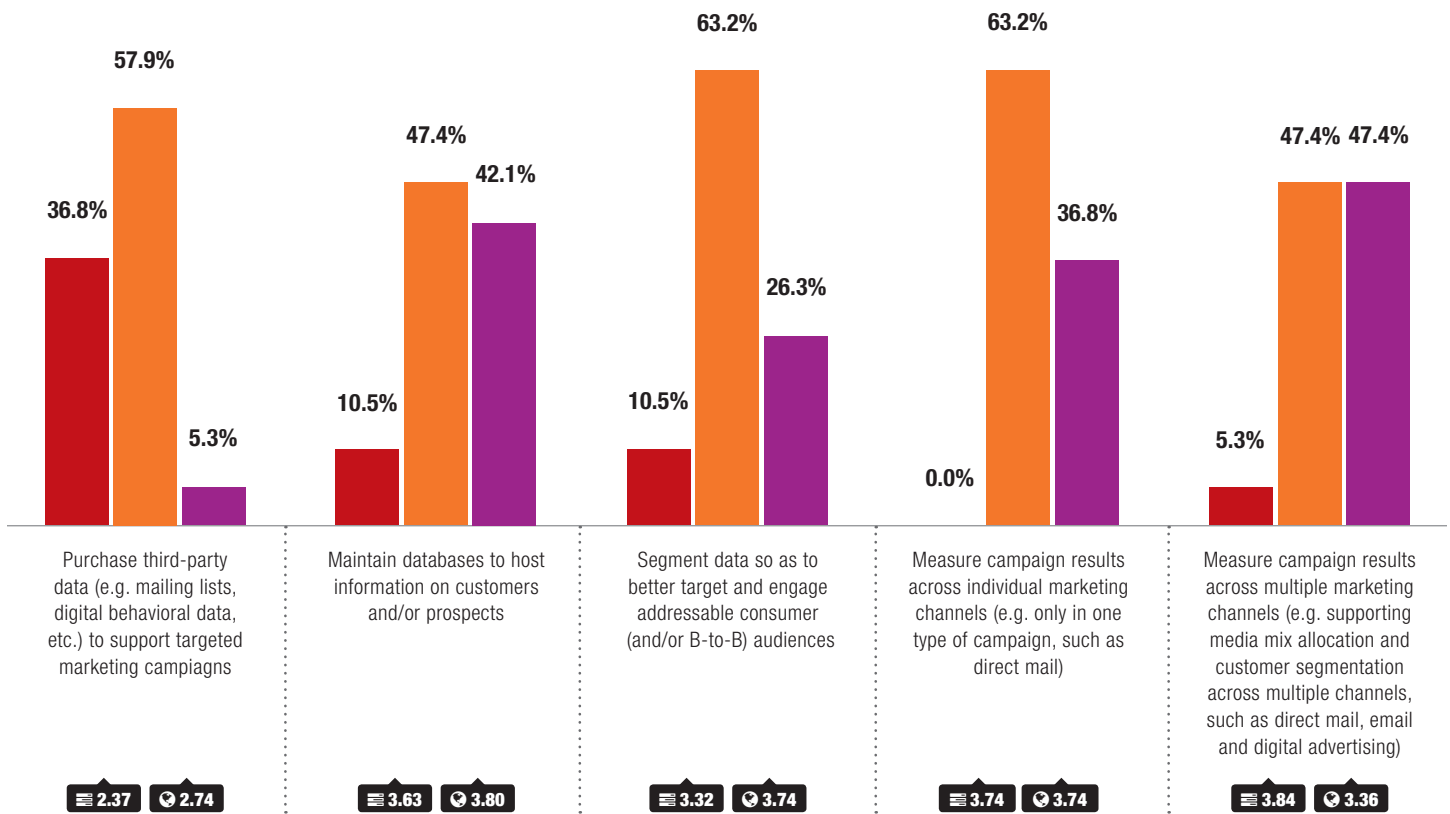


What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

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

Singapore Index

Global Index

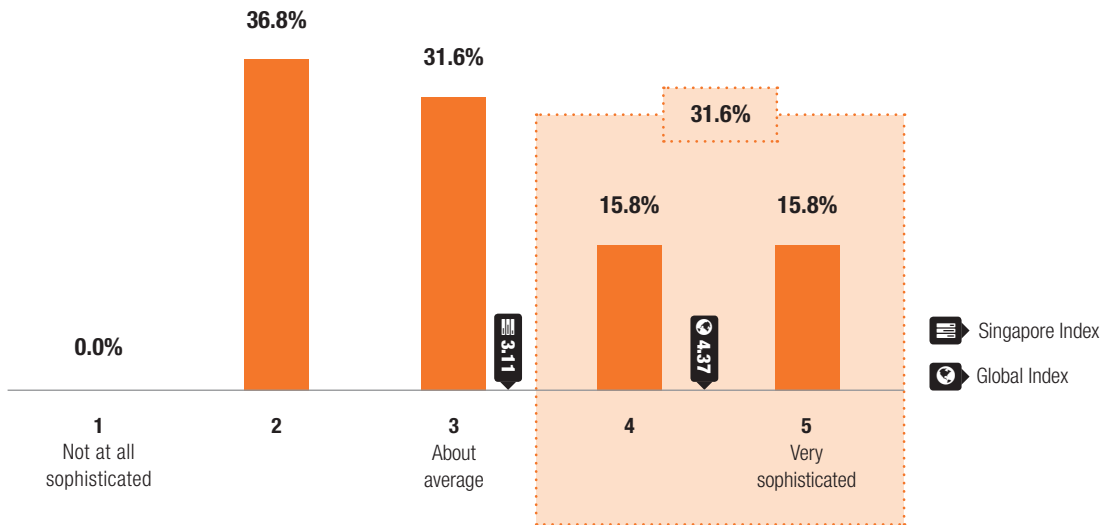
A NOTE ABOUT INDEX SCORES

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DDMA SOPHISTICATION

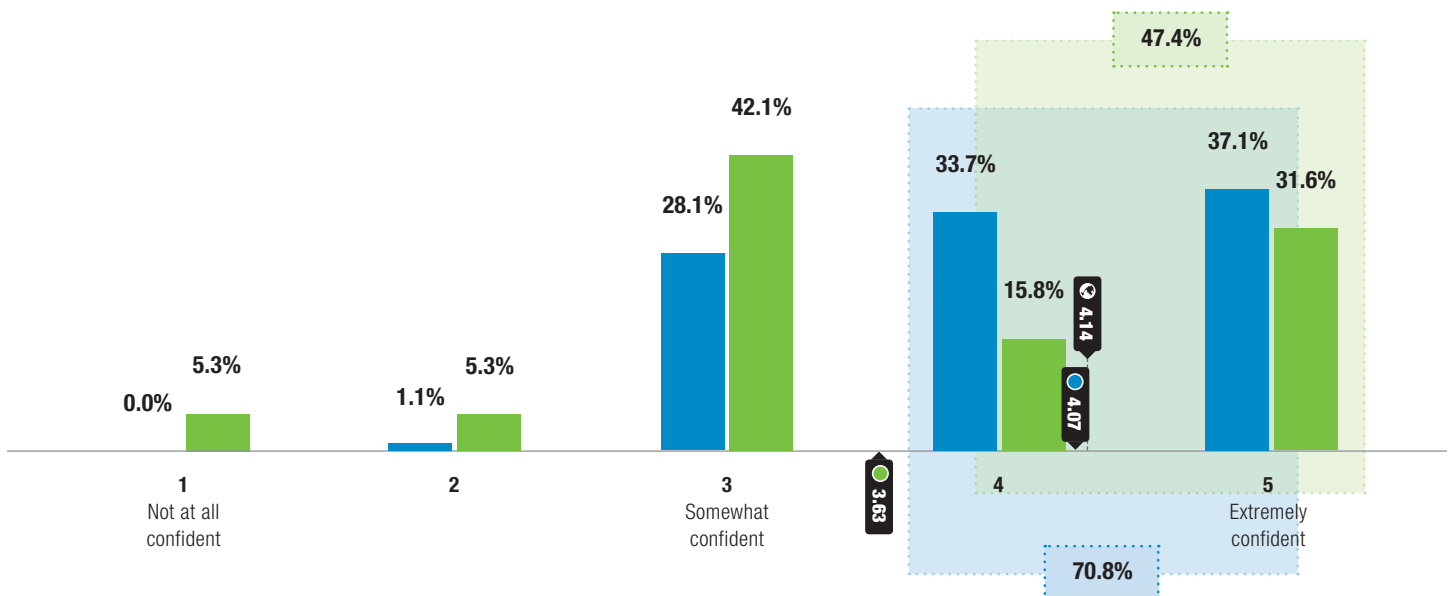
How sophisticated is your organization's data-driven marketing and advertising (DDMA) approach?



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?

● 2014 ● 2015 📊 Singapore Index 🌐 Global Index (2015)

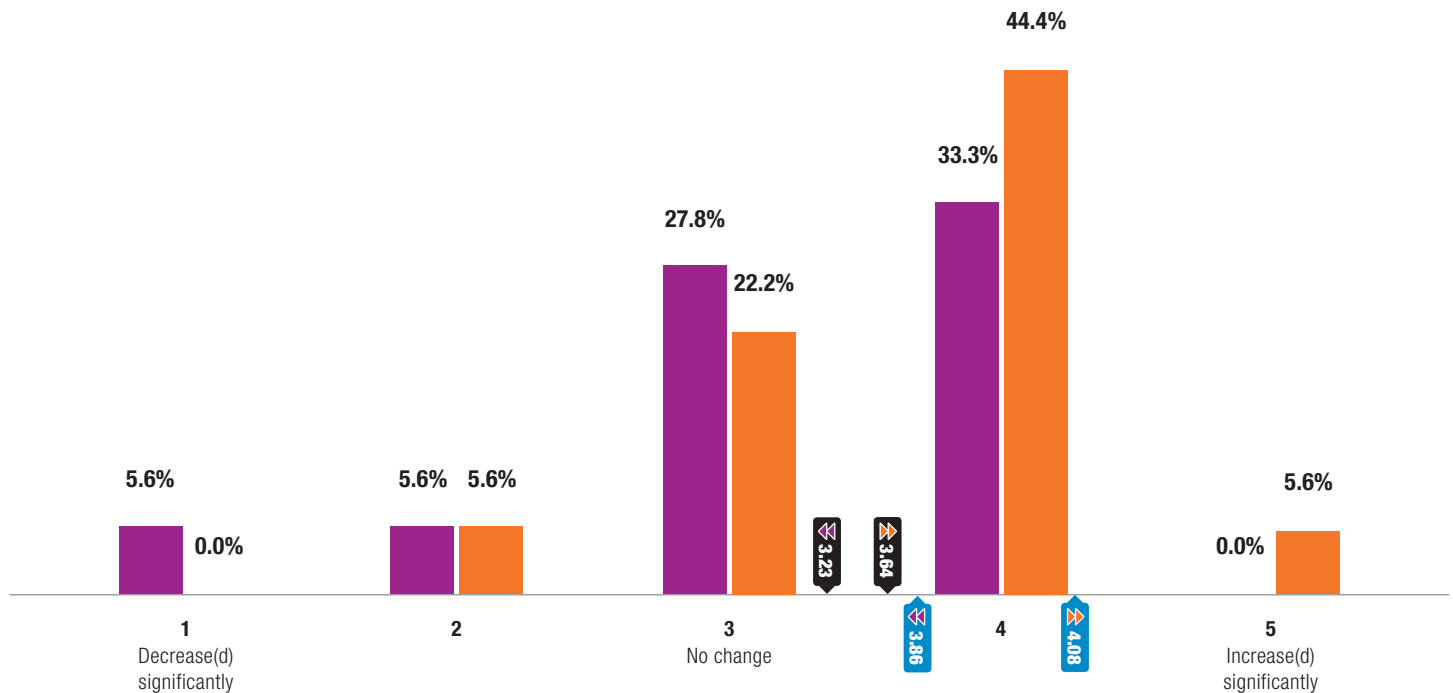


How are practitioners investing in DDMA? What returns are they generating?

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?

◀ The past year
 ▶ The coming year
 ▶ Singapore Index (2014)
 ▶ Singapore Index (2015)

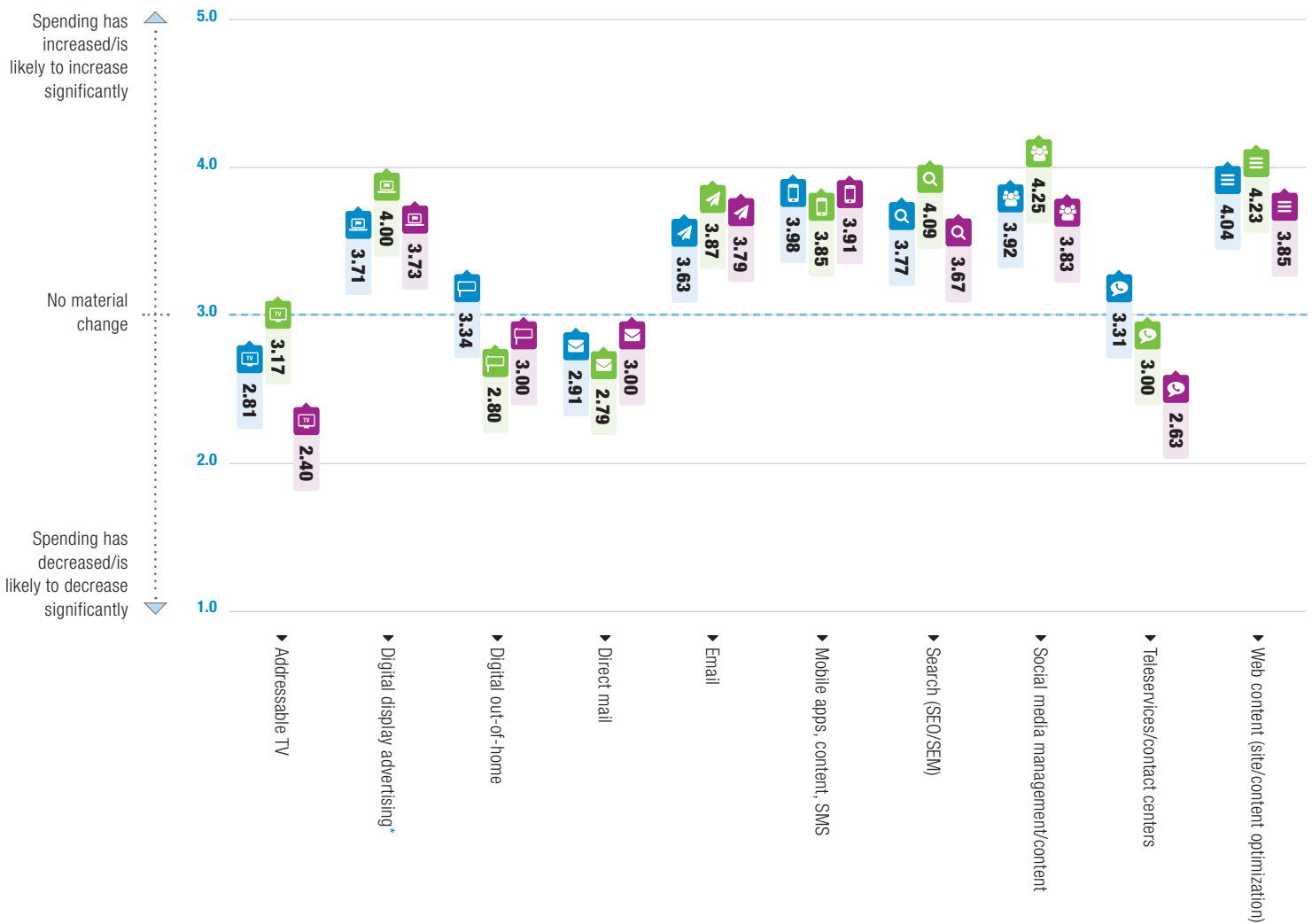


Note: Refer to page 16 of the 2015 *Global Review* for global averages

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



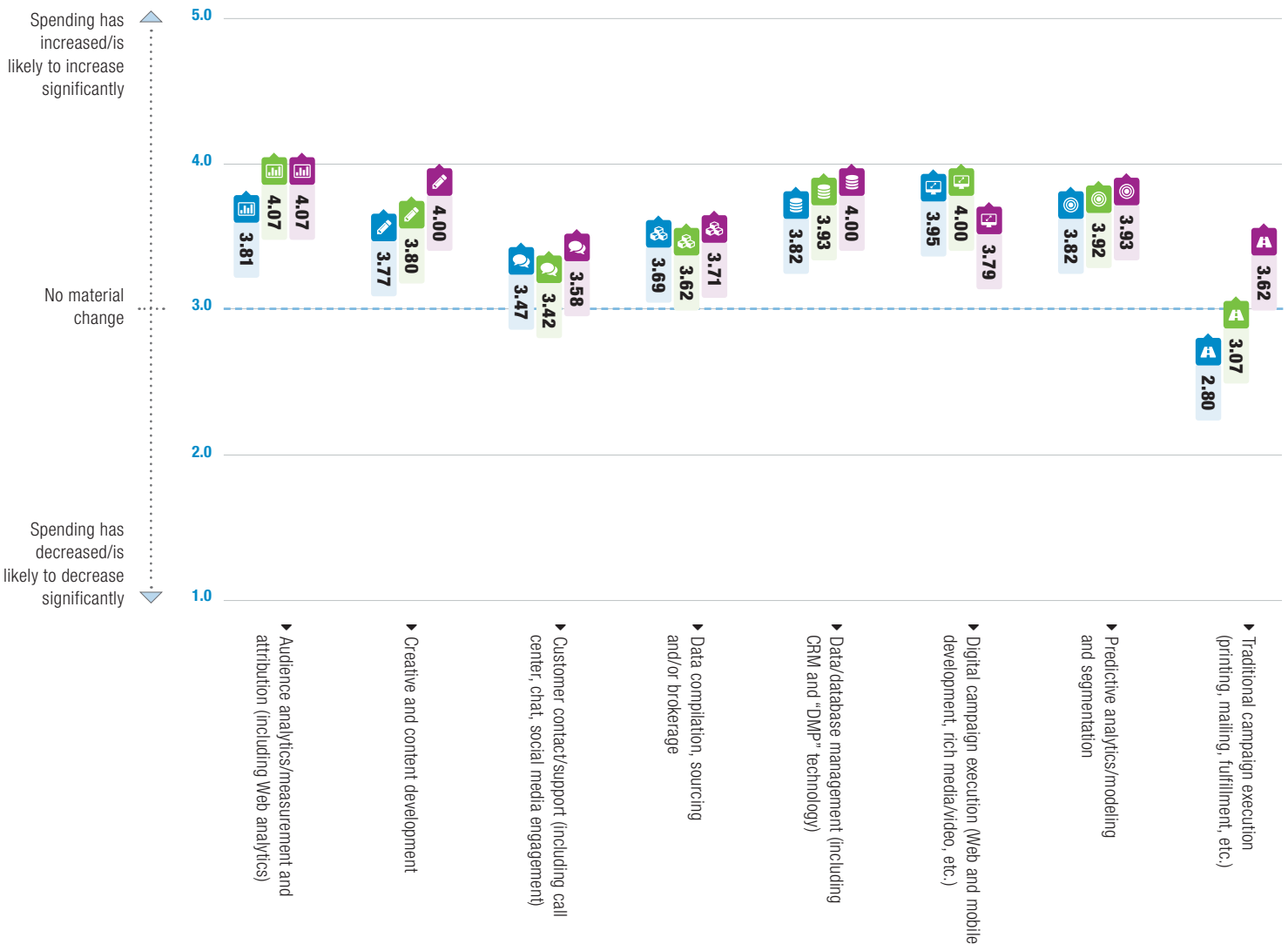
*Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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

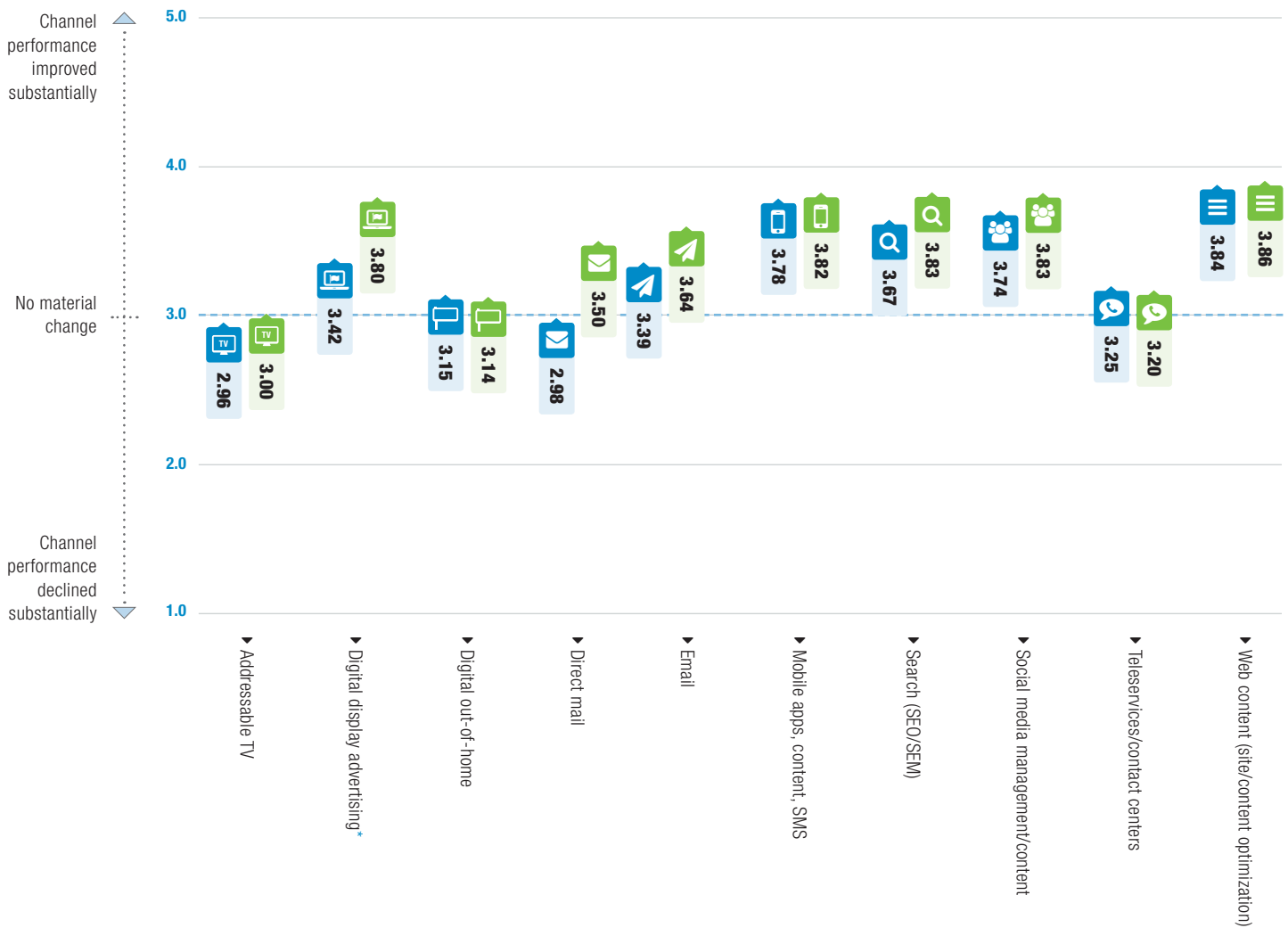


Note: Refer to page 18 of the 2015 *Global Review* for global averages

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



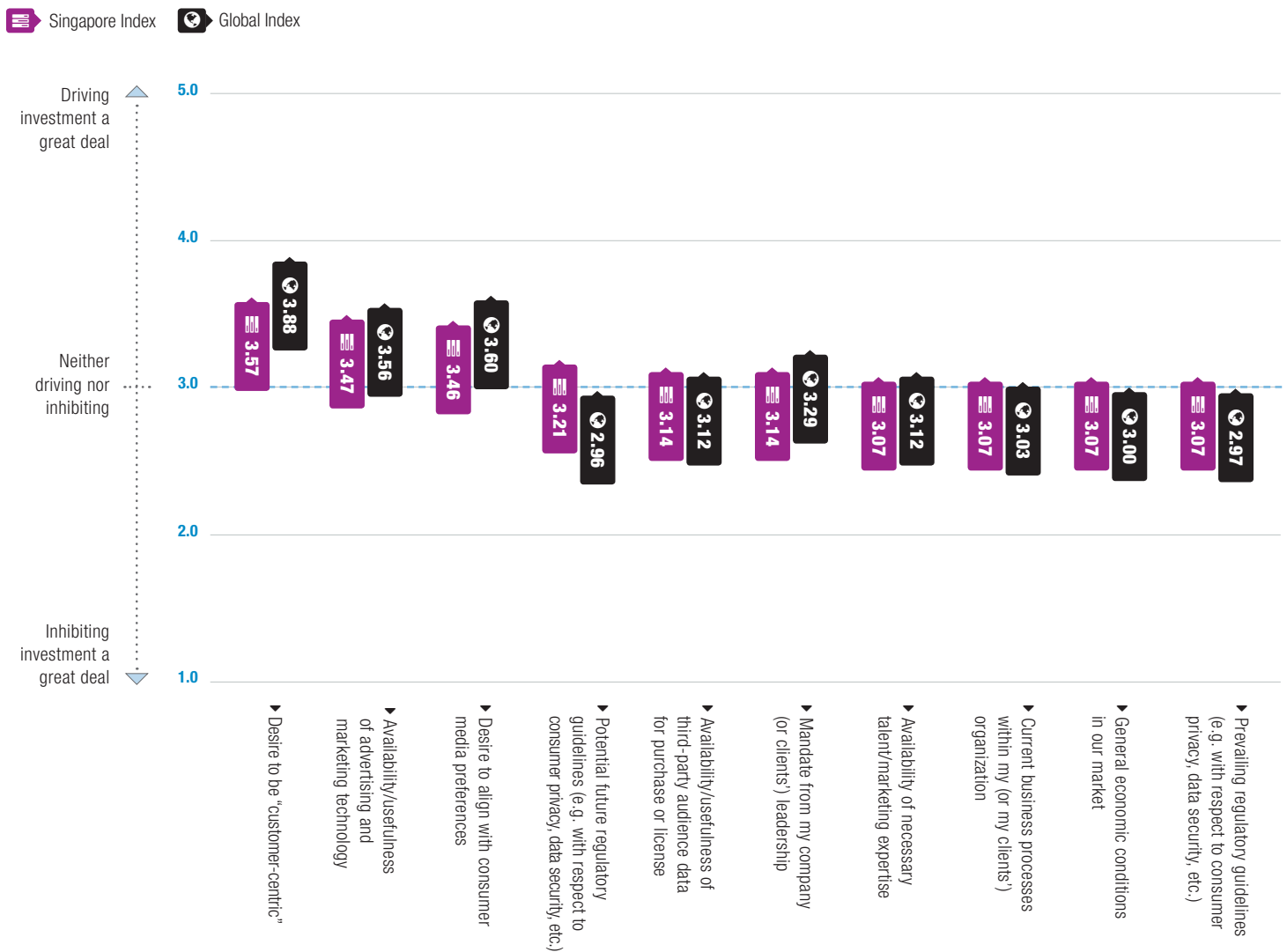
* Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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

What's driving the practice of DDMA? What's inhibiting it?

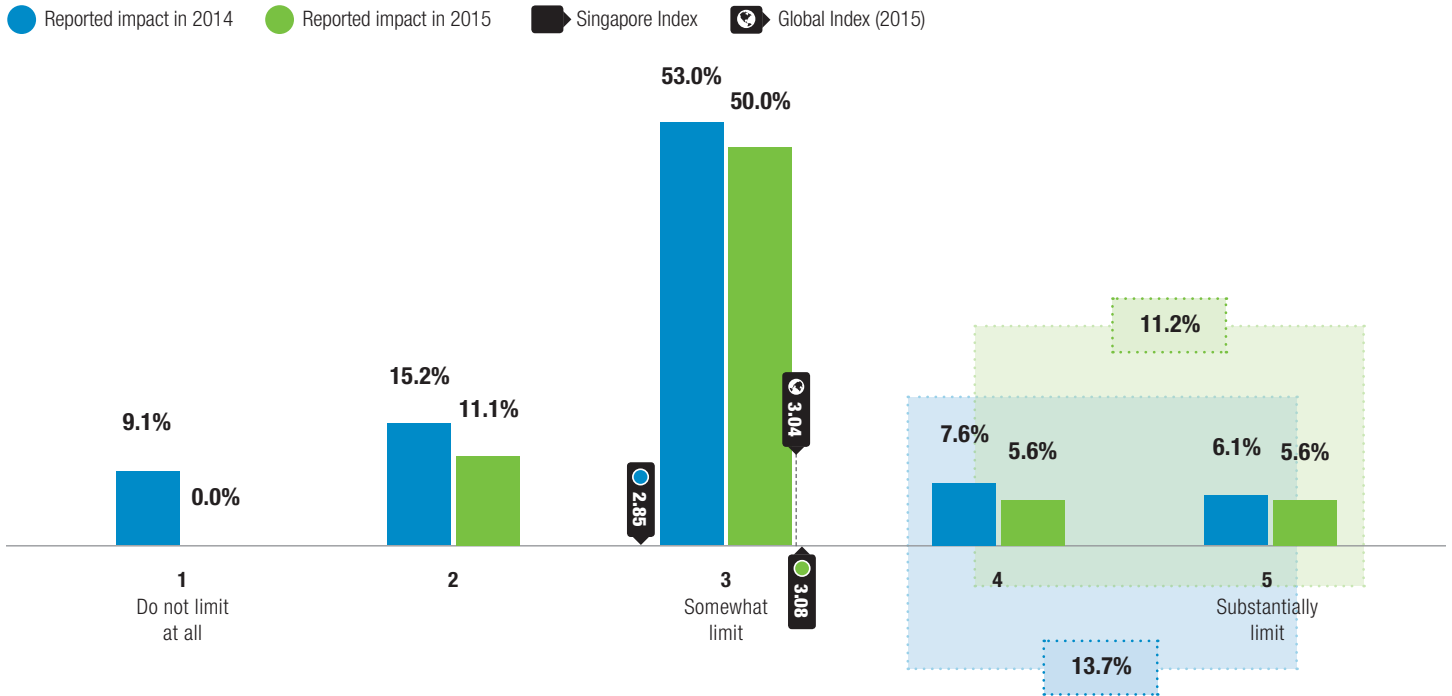
FACTORS DRIVING OR INHIBITING DDMA

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



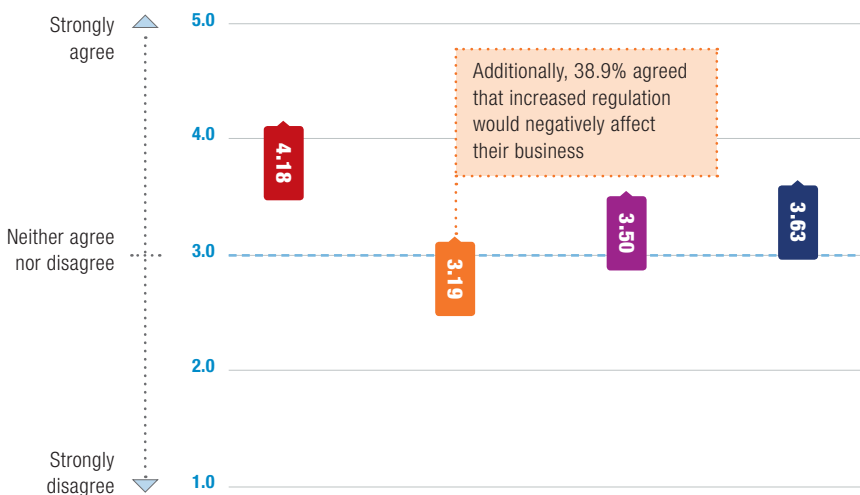
IMPACT OF REGULATION

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?



Sweden





Sweden

PANEL:
40 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY – AUGUST 2015

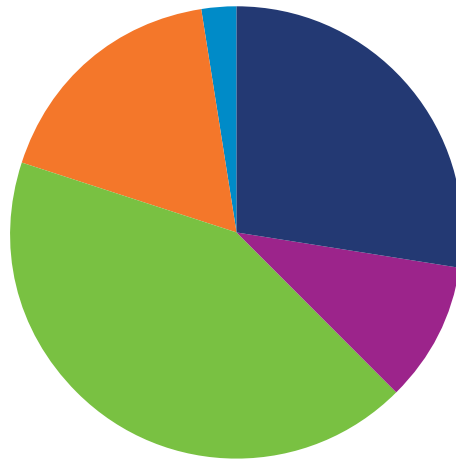
* Not all respondents answered every question

PRESENTING ASSOCIATION **SWEDMA**

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

PANEL COMPOSITION

How would you describe your principal role/business focus?

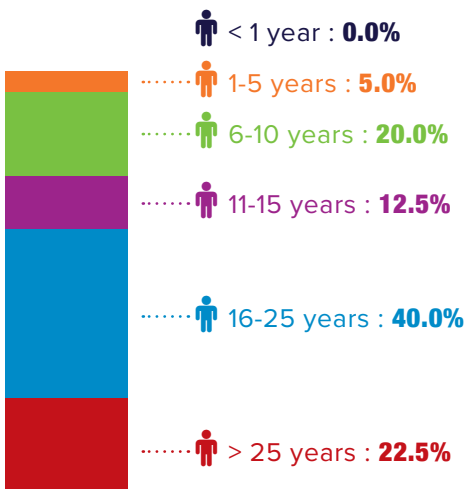


- **MARKETER/ADVERTISER : 27.5%**
- **PUBLISHER/MEDIA : 10.0%**
(focused on selling advertising)
- **PROVIDER OF MARKETING SERVICES : 42.5%**
(including data and agency services)
- **DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY : 17.5%**
- **OTHER : 2.5%**

EXPERIENCE

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

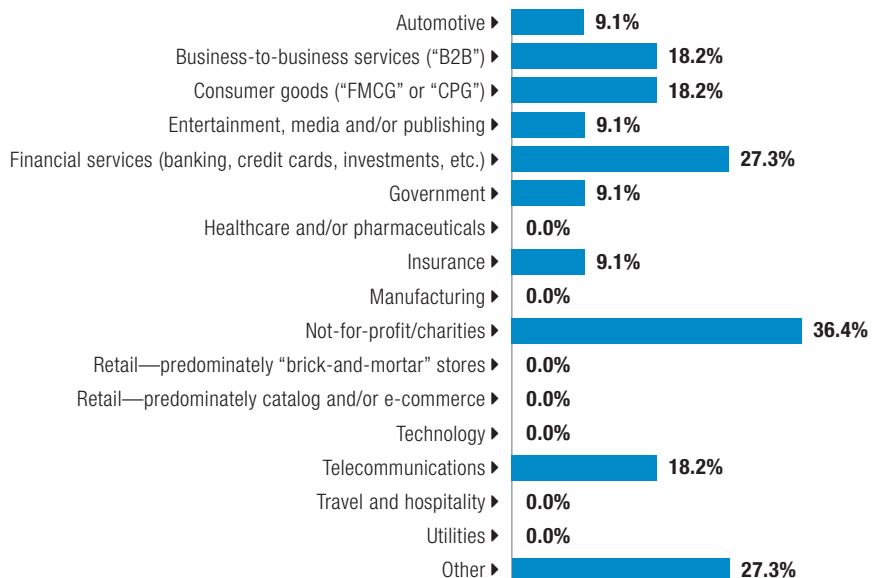
Please consider your current job and past professional roles that may apply.



INDUSTRY REPRESENTATION

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

Displaying panelists' "top three" responses

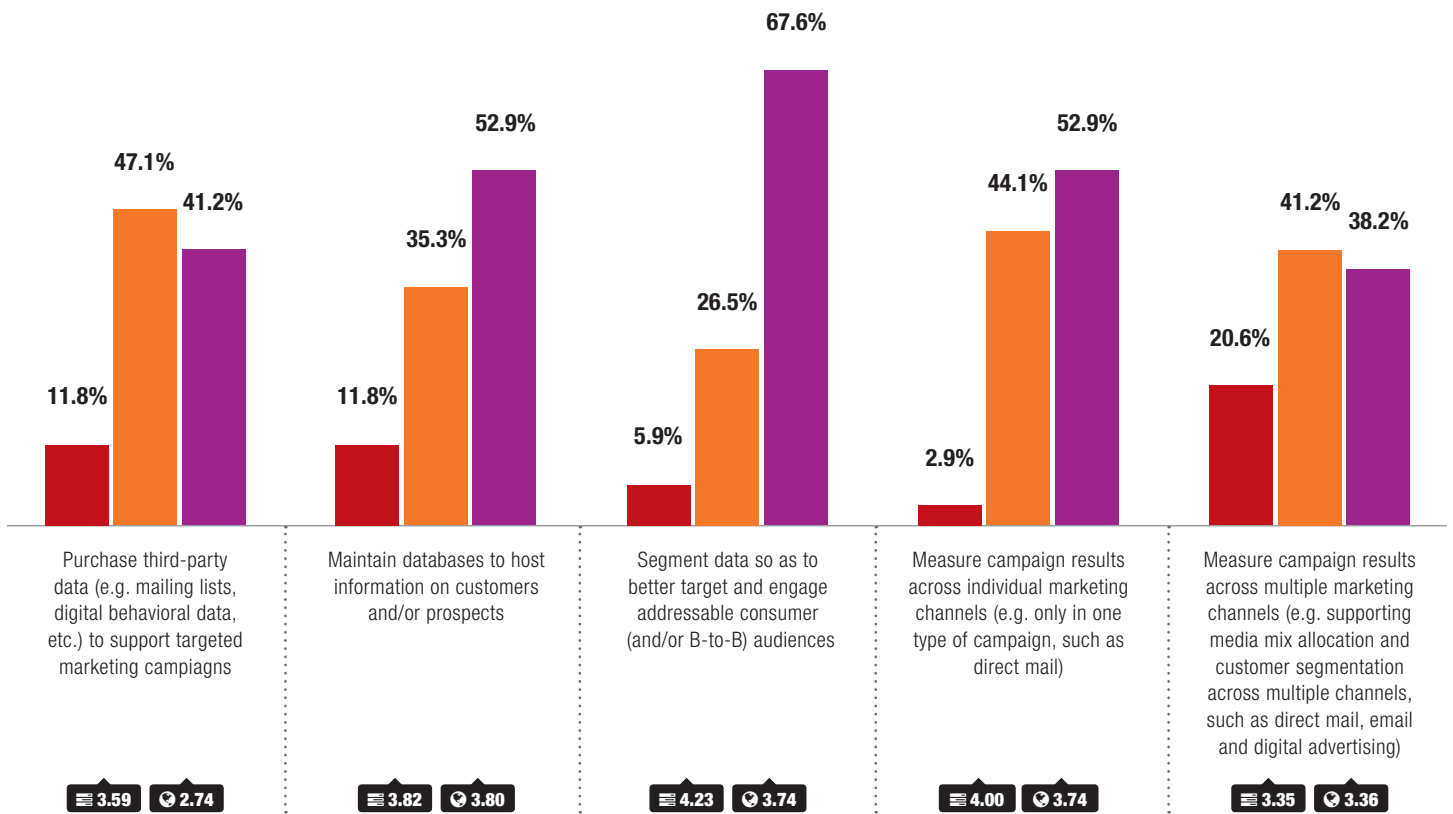


What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

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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Sweden Index

Global Index

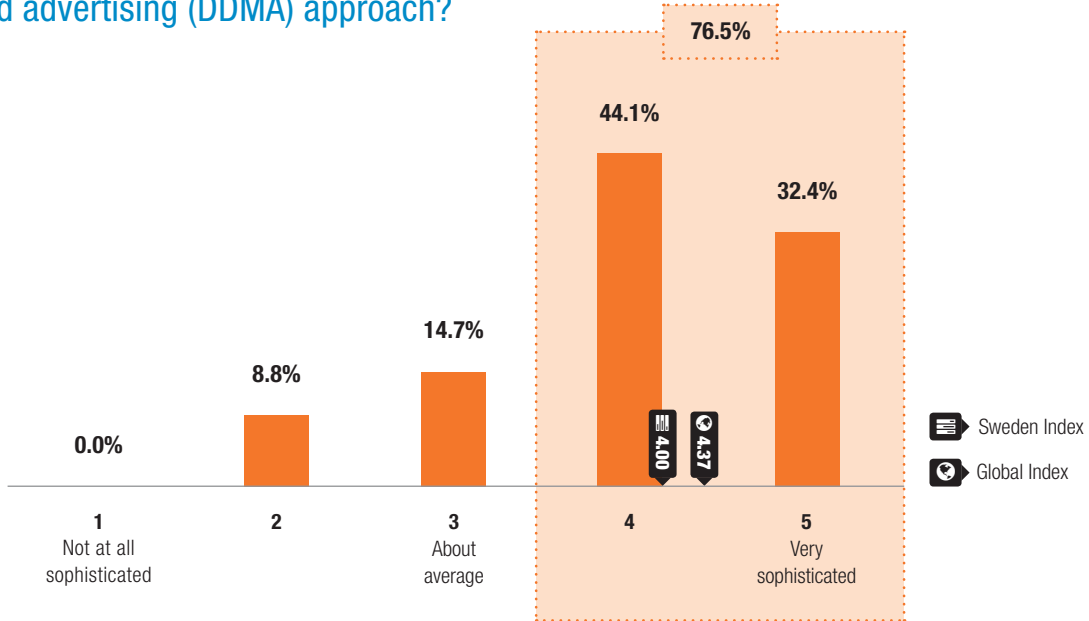
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DDMA SOPHISTICATION

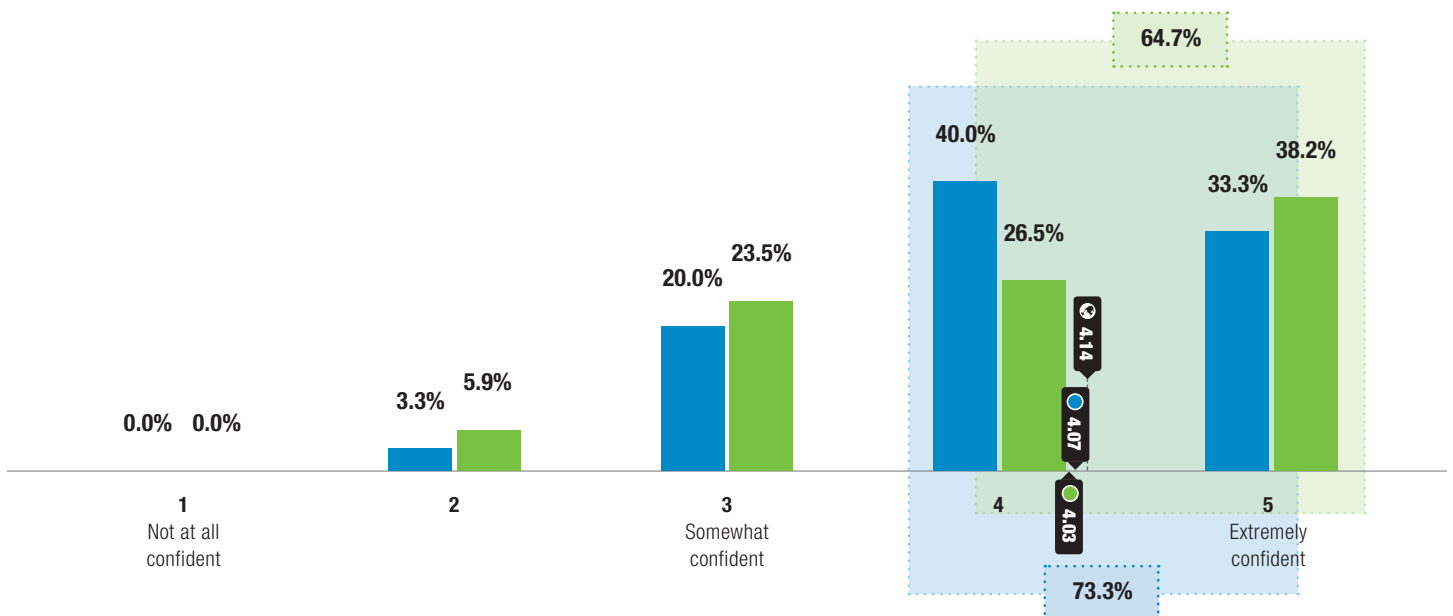
How sophisticated is your organization's data-driven marketing and advertising (DDMA) approach?



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?

2014 2015 Sweden Index Global Index (2015)

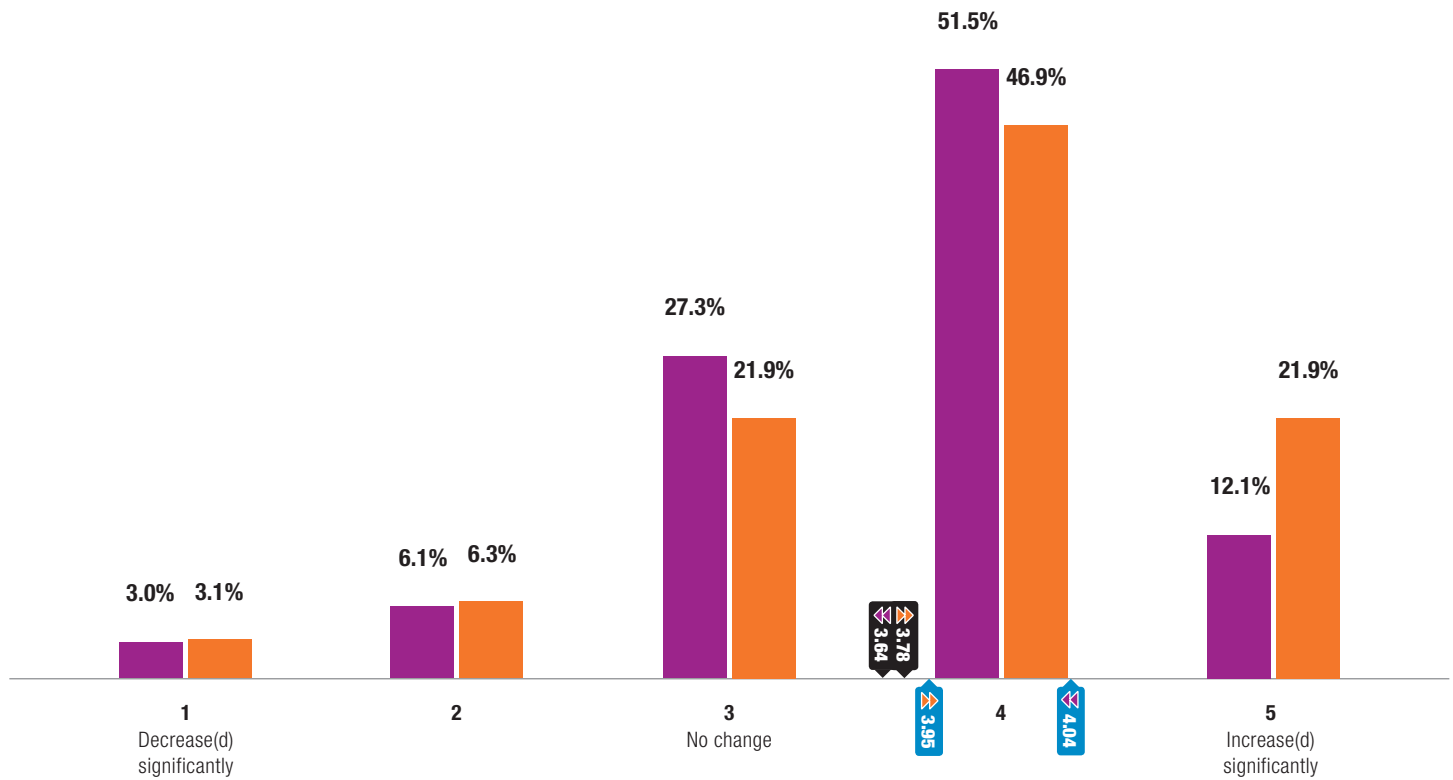


How are practitioners investing in DDMA? What returns are they generating?

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**?

◀ The past year
 ▶ The coming year
 ▶ Sweden Index (2014)
 ▶ Sweden Index (2015)

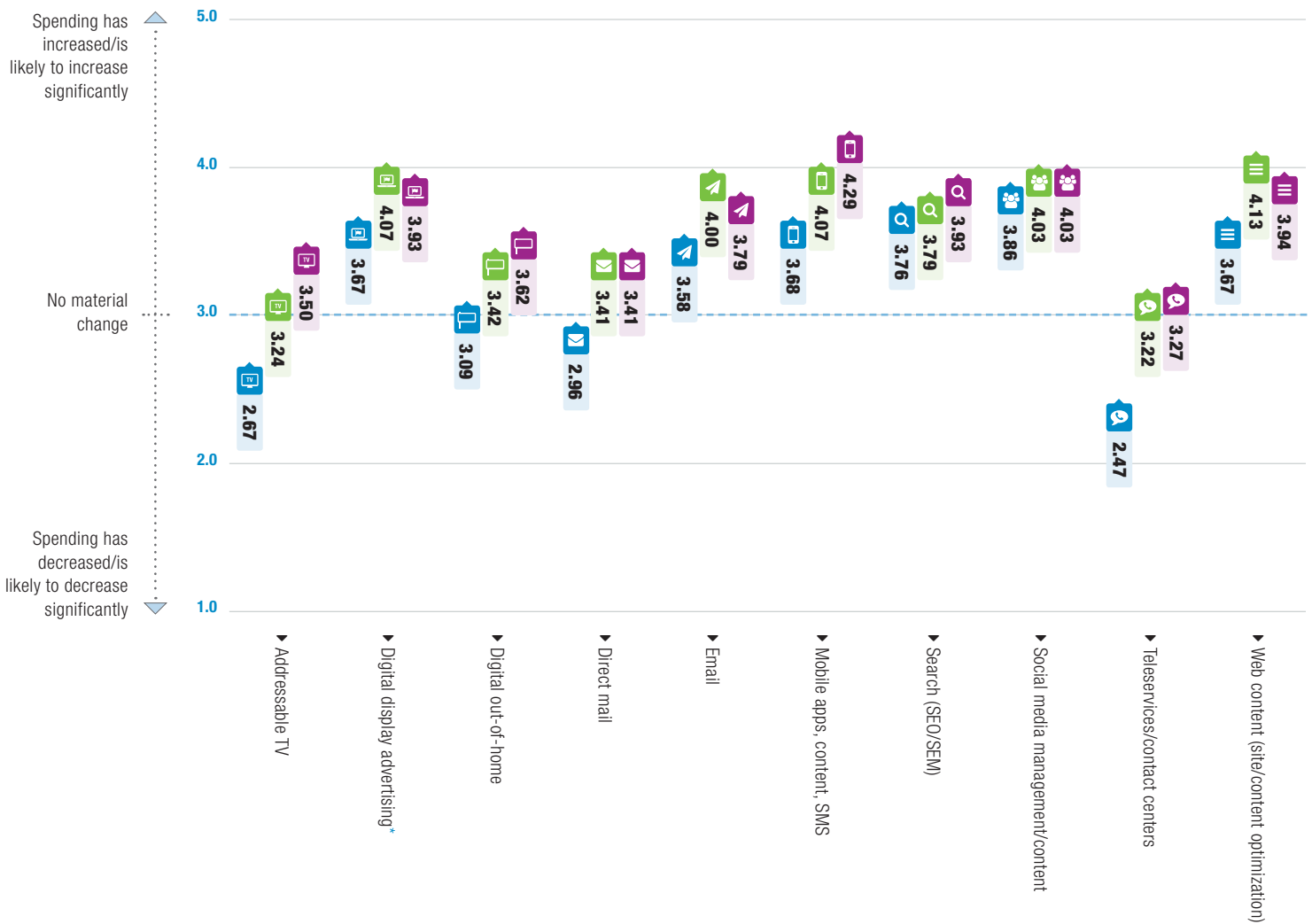


Note: Refer to page 16 of the 2015 *Global Review* for global averages

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?

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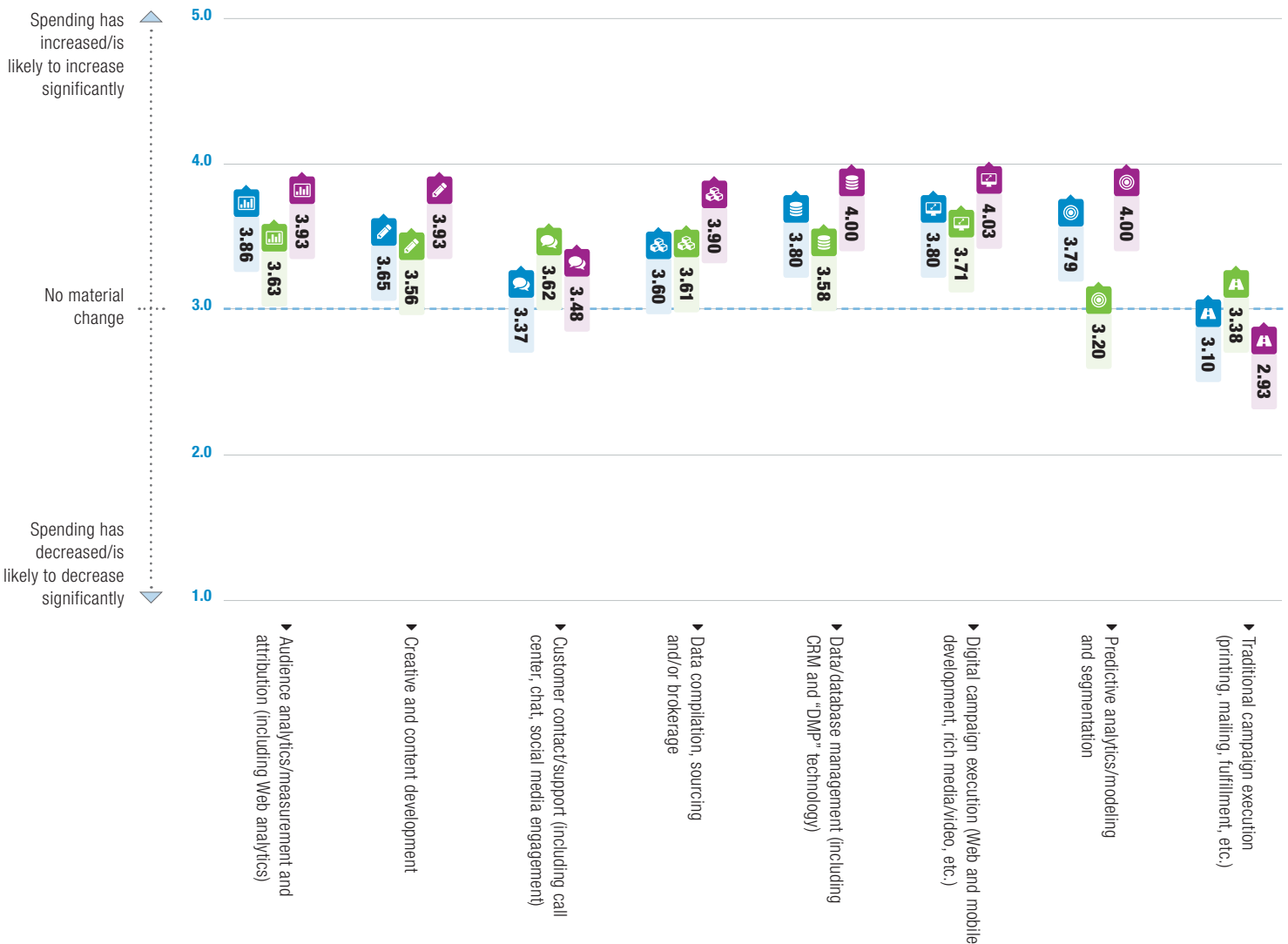
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Note: Refer to page 17 of the 2015 *Global Review* for global averages

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

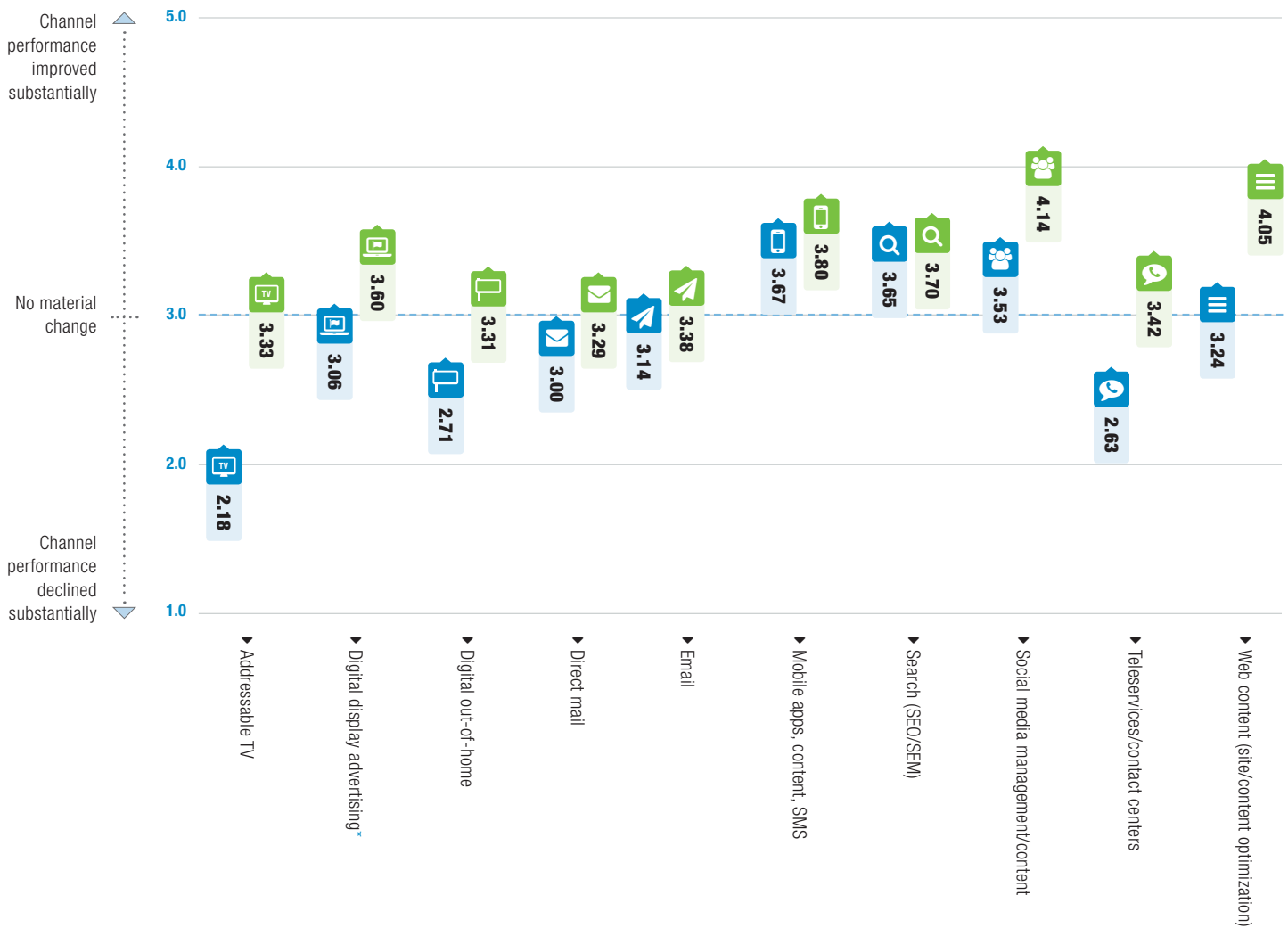


Note: Refer to page 18 of the 2015 *Global Review* for global averages

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



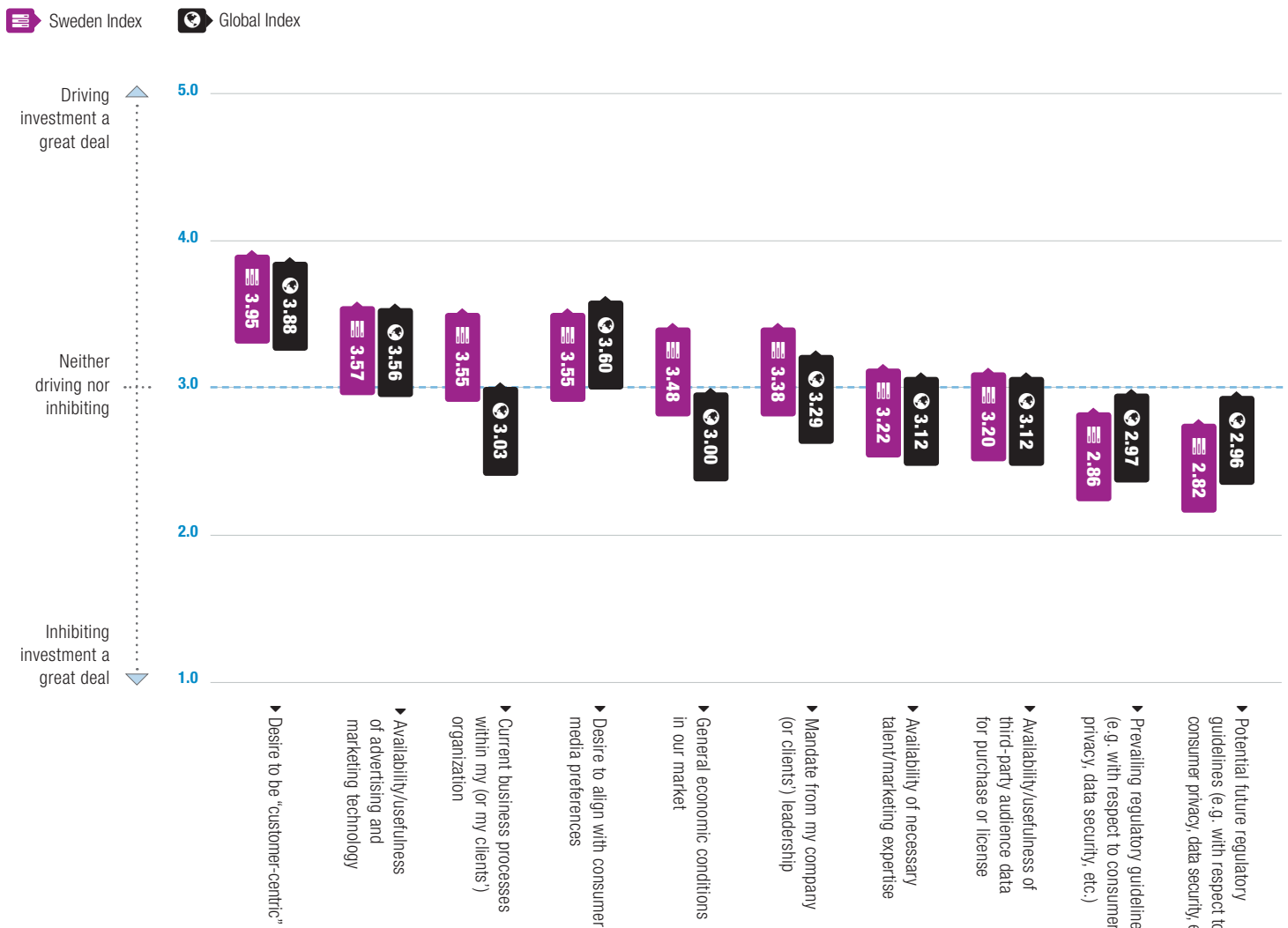
* Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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

What's driving the practice of DDMA? What's inhibiting it?

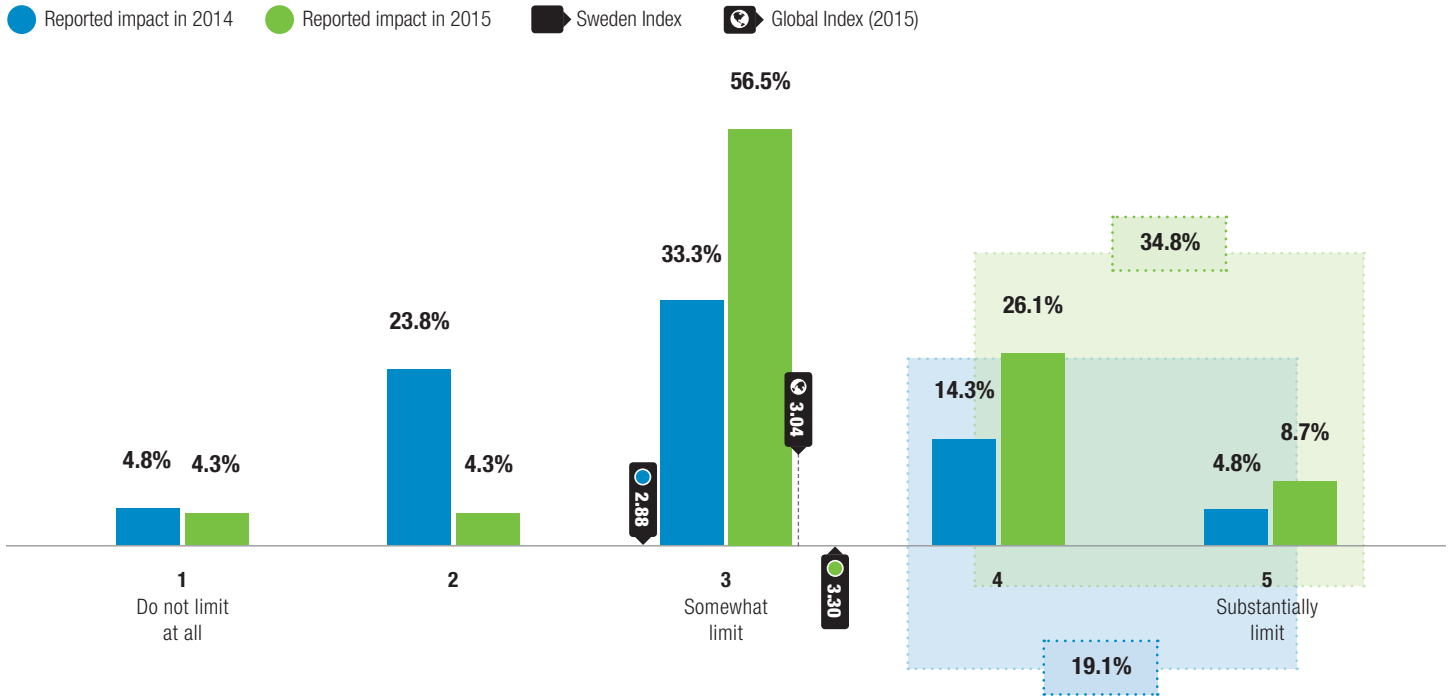
FACTORS DRIVING OR INHIBITING DDMA

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



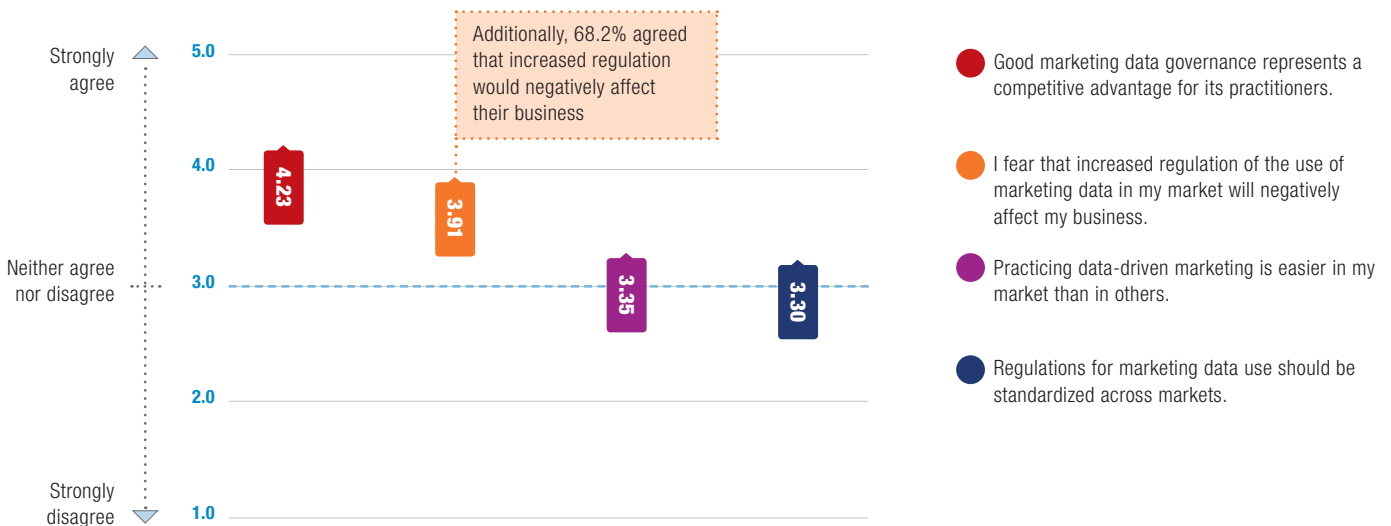
IMPACT OF REGULATION

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?



United Kingdom



United Kingdom

PANEL:
135 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY – SEPTEMBER 2015

* Not all respondents answered every question

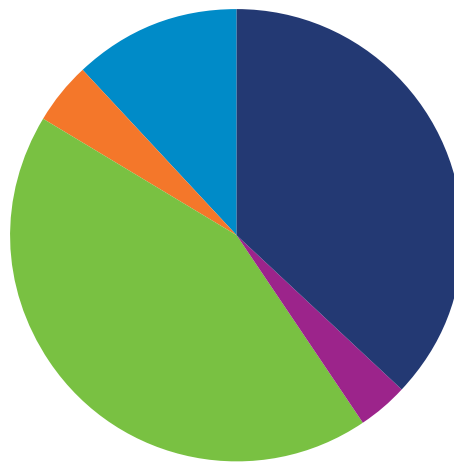
PRESENTING ASSOCIATION

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?

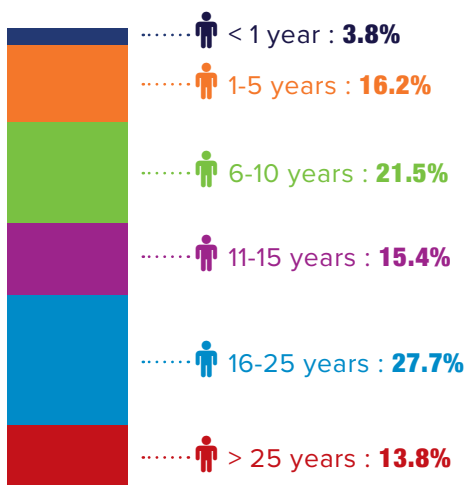


- **MARKETER/ADVERTISER : 37.0%**
- **PUBLISHER/MEDIA : 3.7%**
(focused on selling advertising)
- **PROVIDER OF MARKETING SERVICES : 43.0%**
(including data and agency services)
- **DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY : 4.4%**
- **OTHER : 11.9%**

EXPERIENCE

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

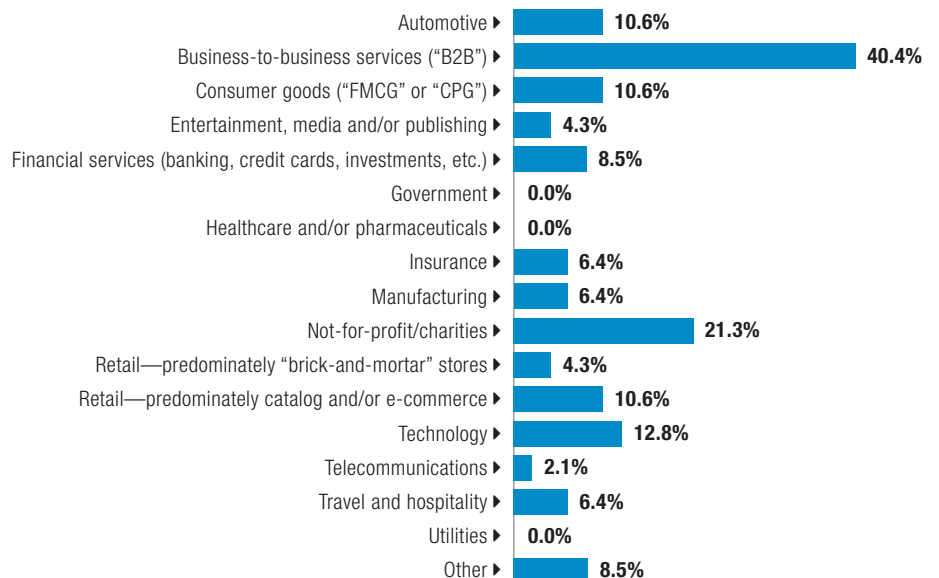
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INDUSTRY REPRESENTATION

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

Displaying panelists' "top three" responses

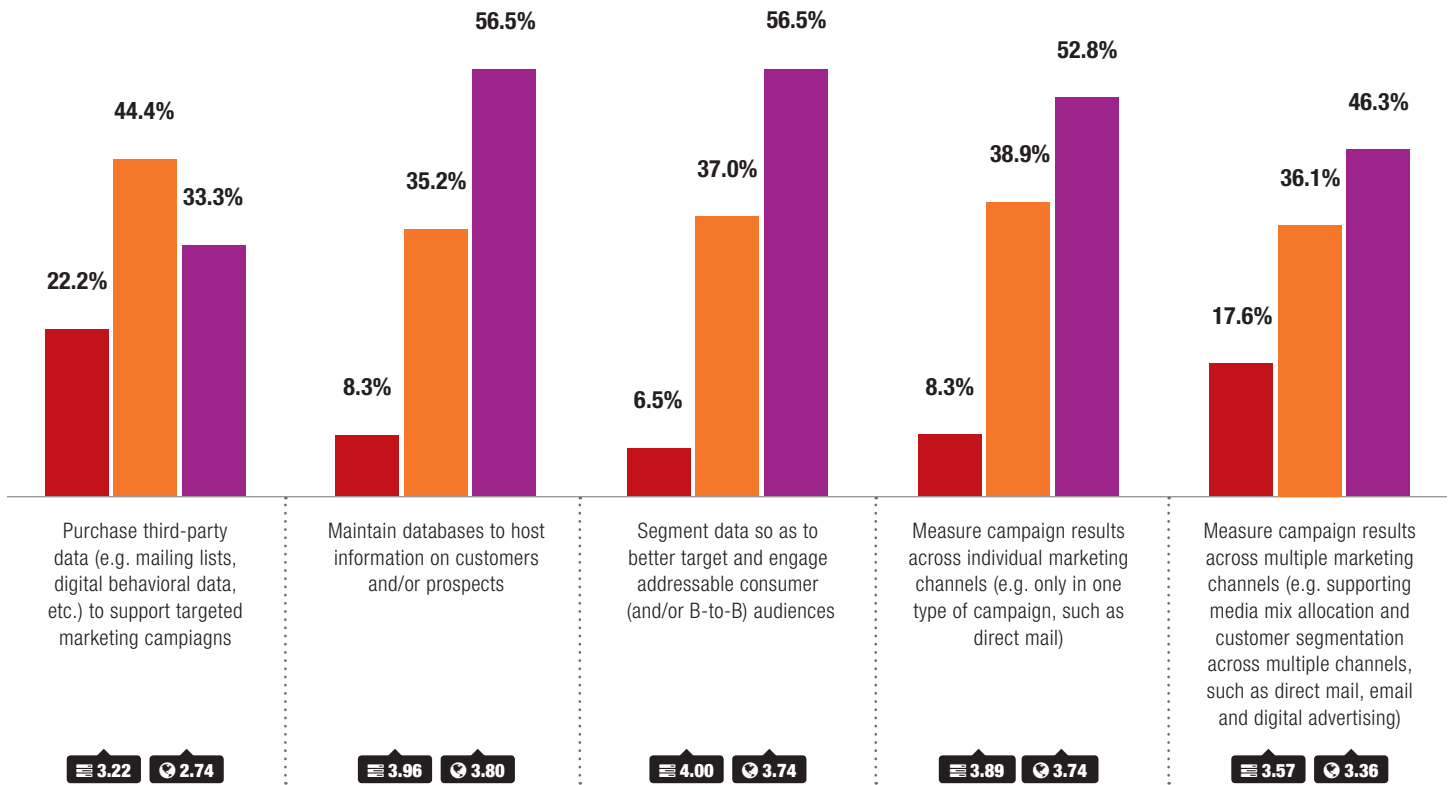


What is Data-Driven Marketing and Advertising (DDMA)? How is the practice evolving?

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

United Kingdom Index

Global Index

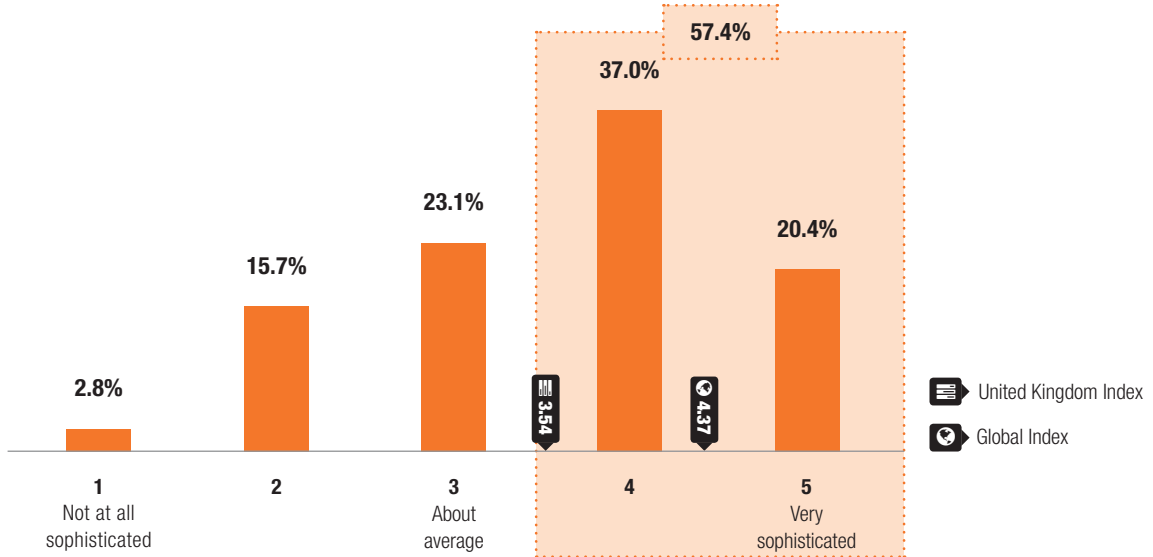
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DDMA SOPHISTICATION

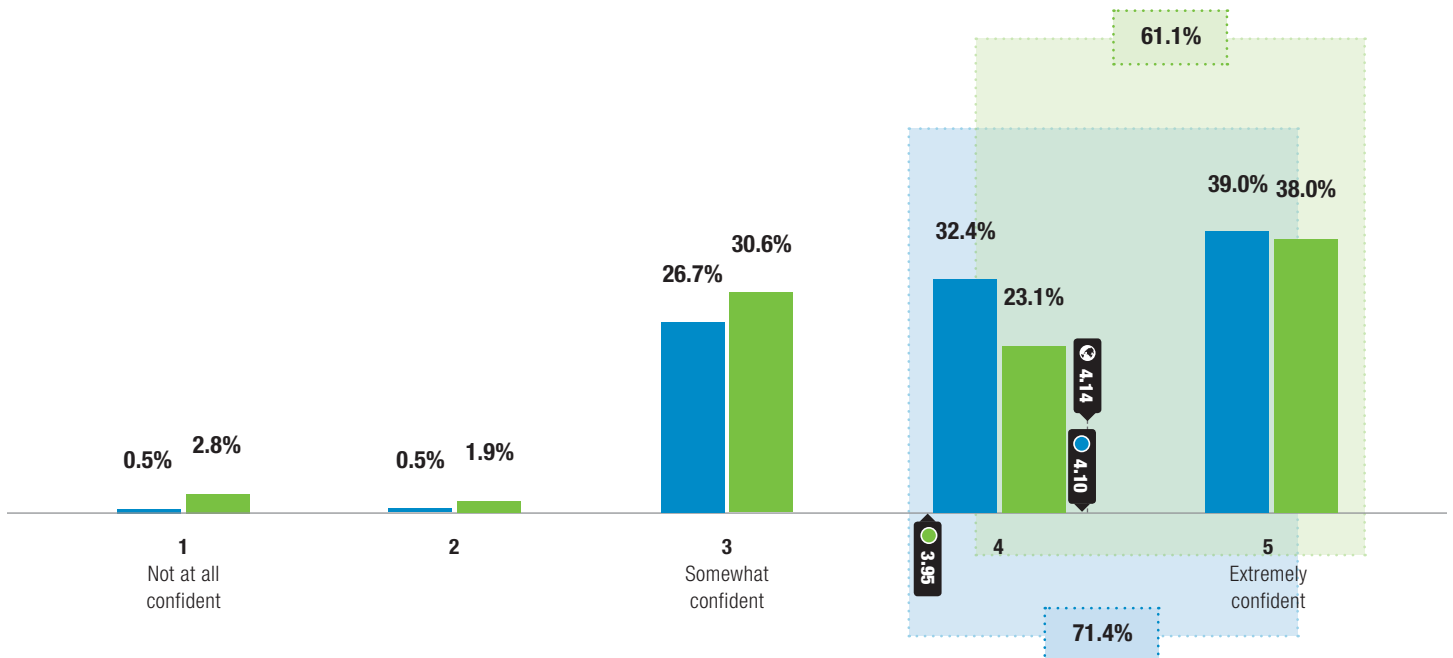
How sophisticated is your organization's data-driven marketing and advertising (DDMA) approach?



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?

● 2014 ● 2015 ■ United Kingdom Index ■ Global Index (2015)

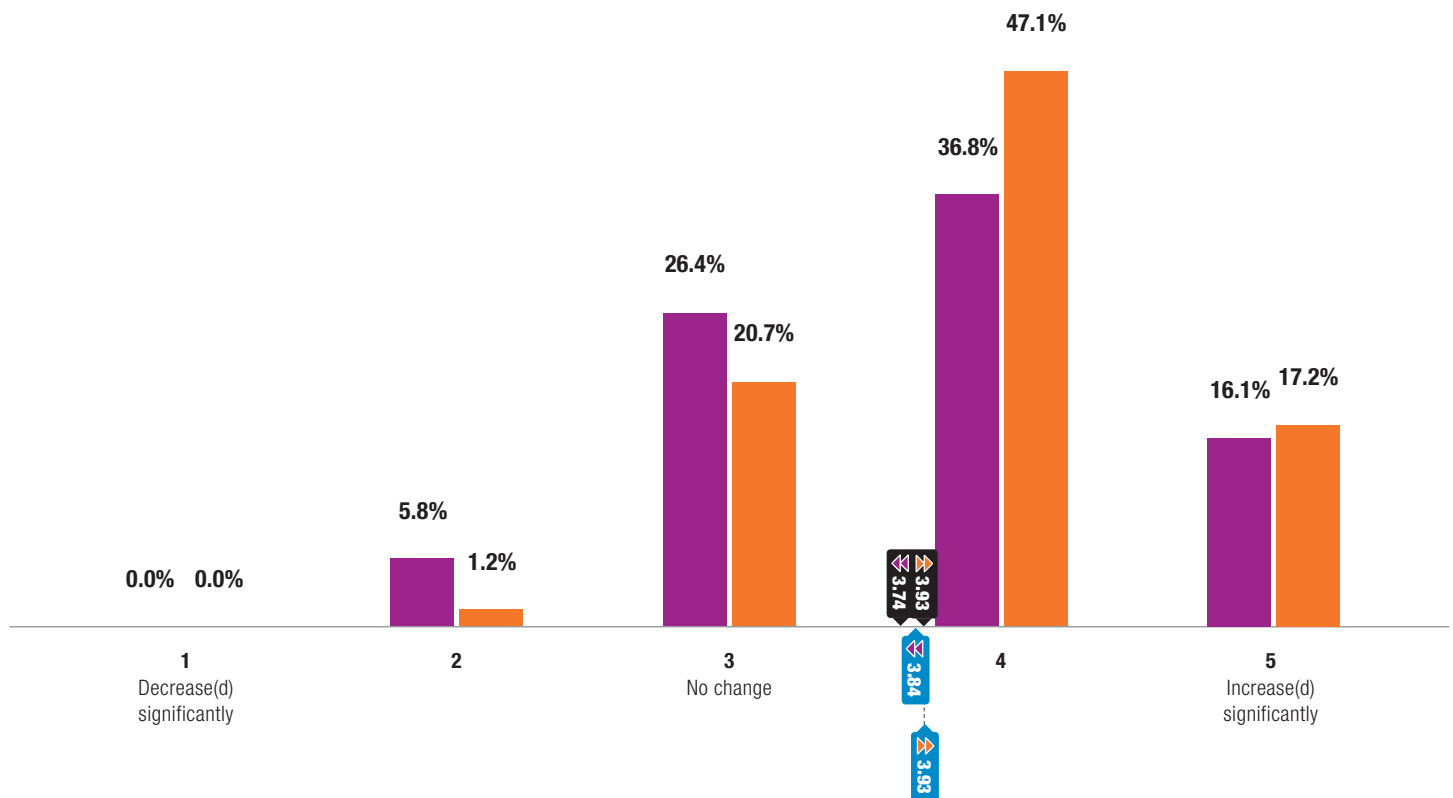


How are practitioners investing in DDMA? What returns are they generating?

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?

◀ The past year
 ▶ The coming year
 ▶ United Kingdom Index (2014)
 ▶ United Kingdom Index (2015)

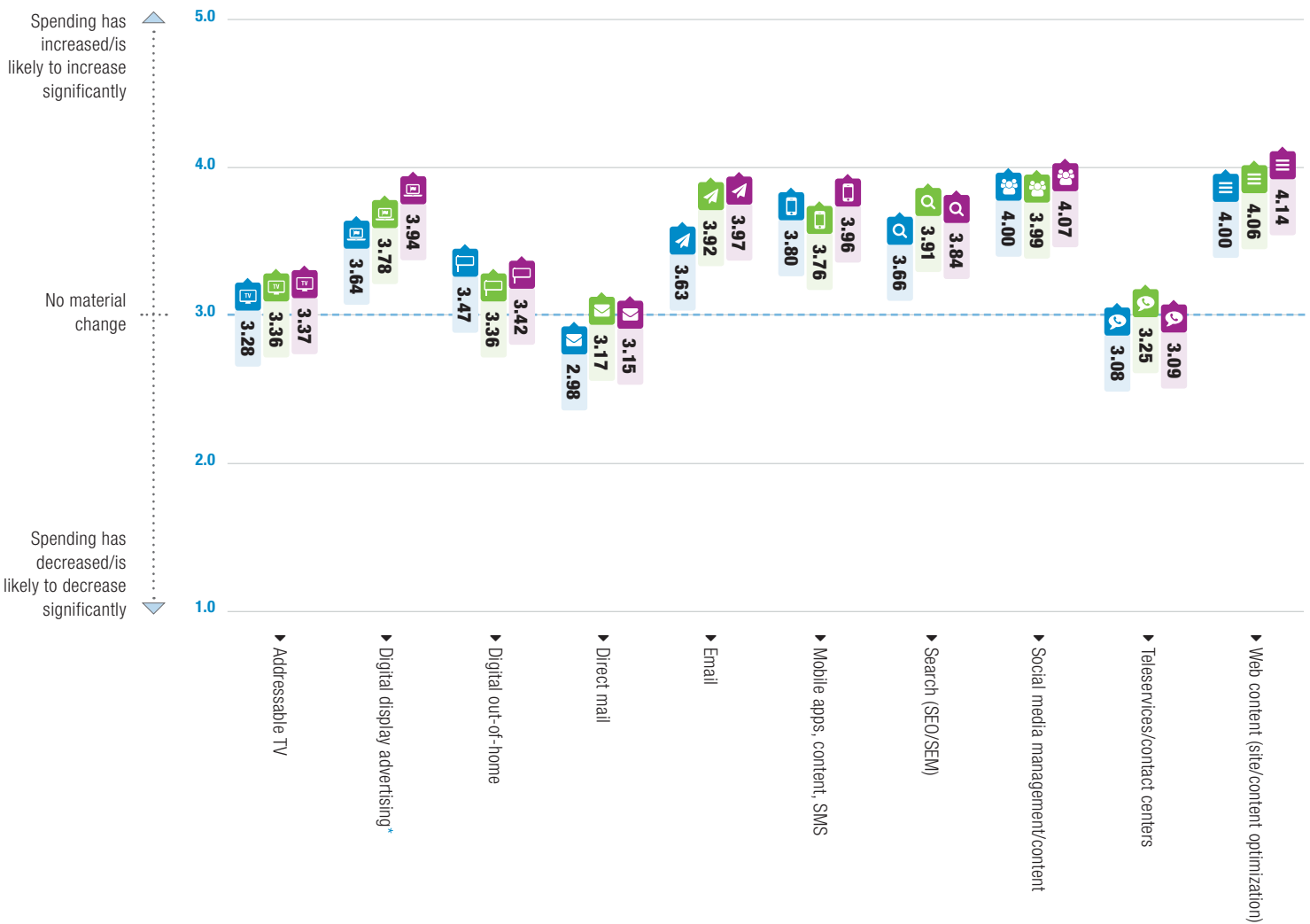


Note: Refer to page 16 of the 2015 *Global Review* for global averages

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?

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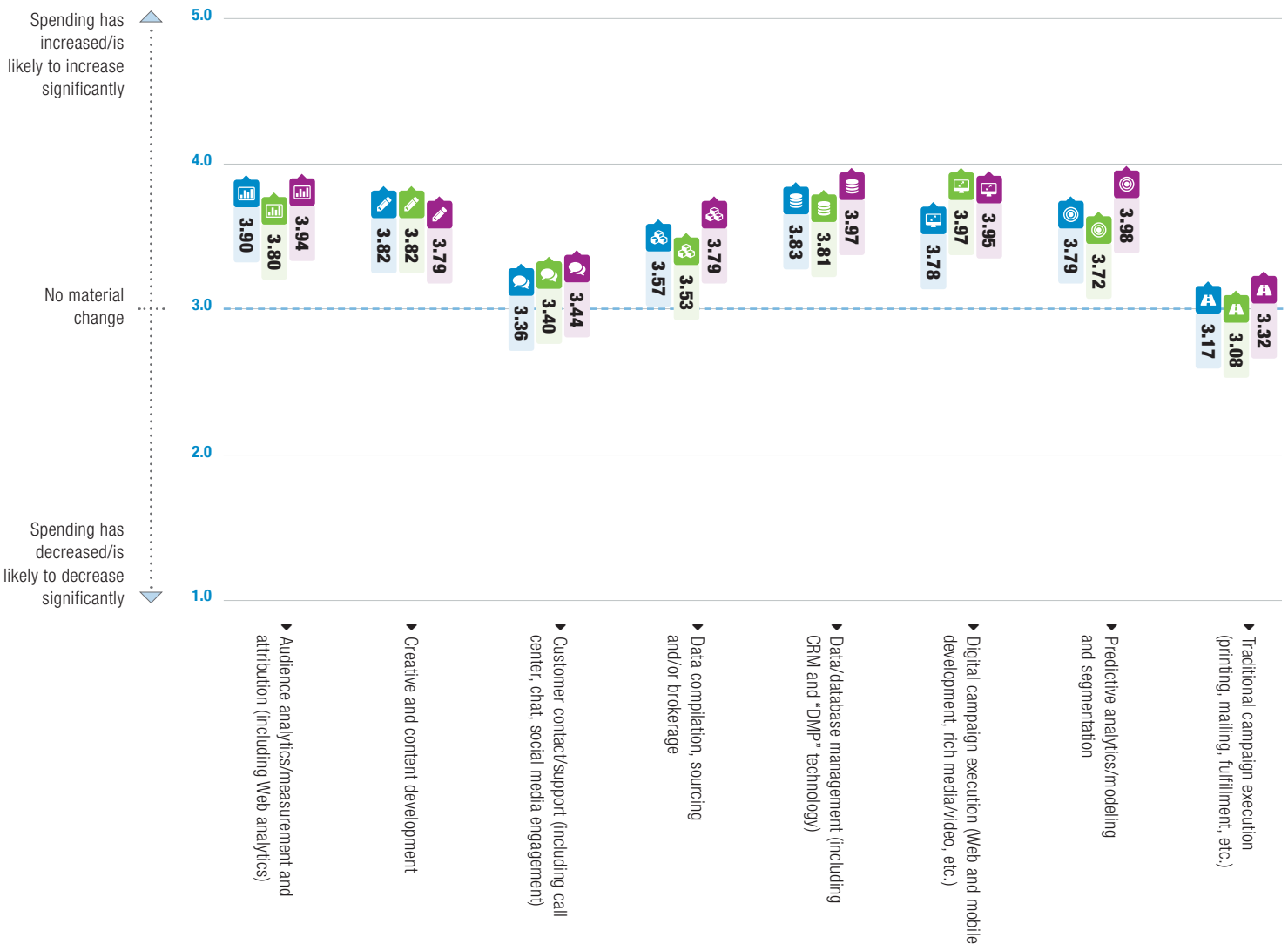
*Including banner, video, rich media and associated formats—as intended for desktop, mobile and tablet devices

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?

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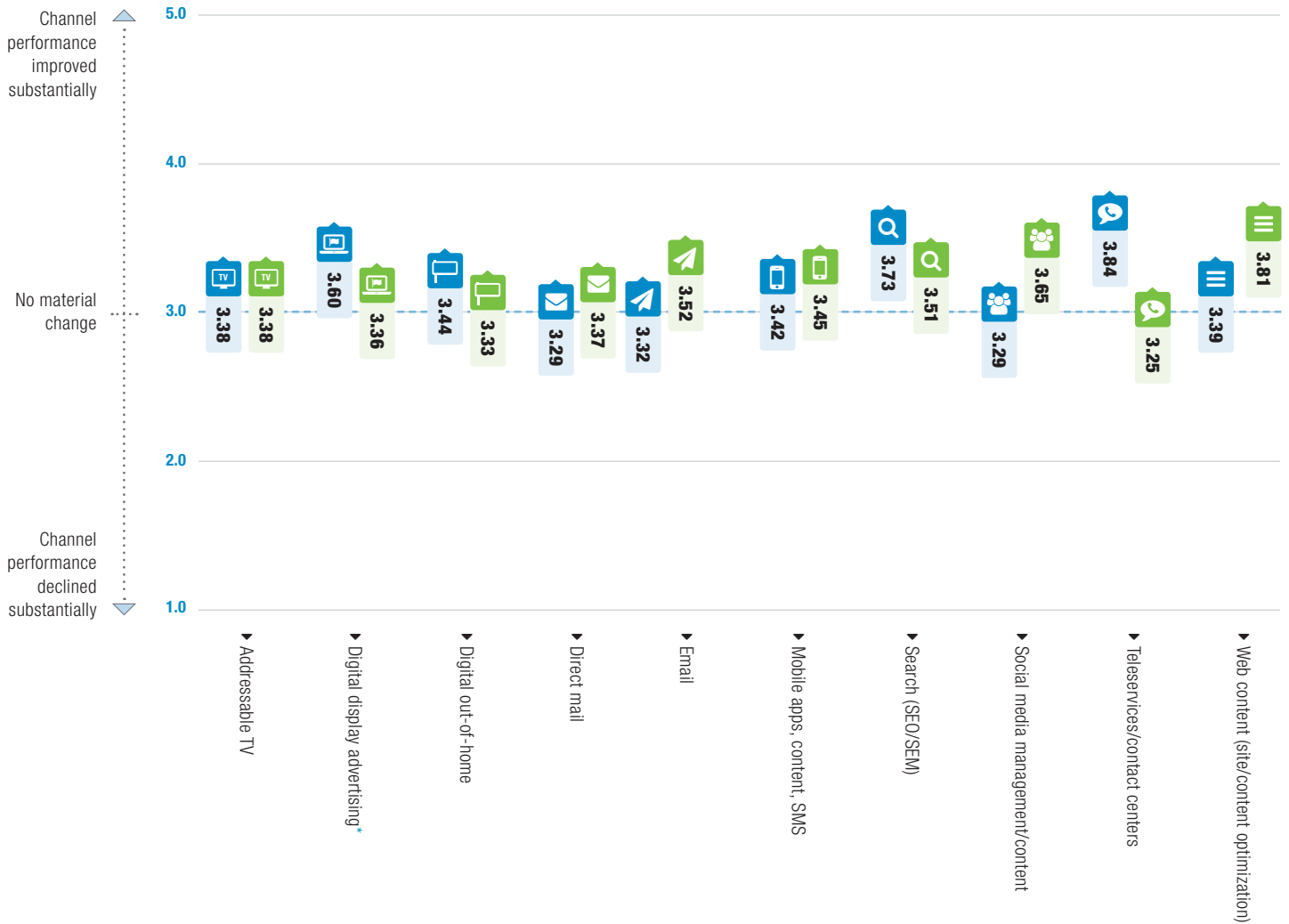


Note: Refer to page 18 of the 2015 *Global Review* for global averages

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



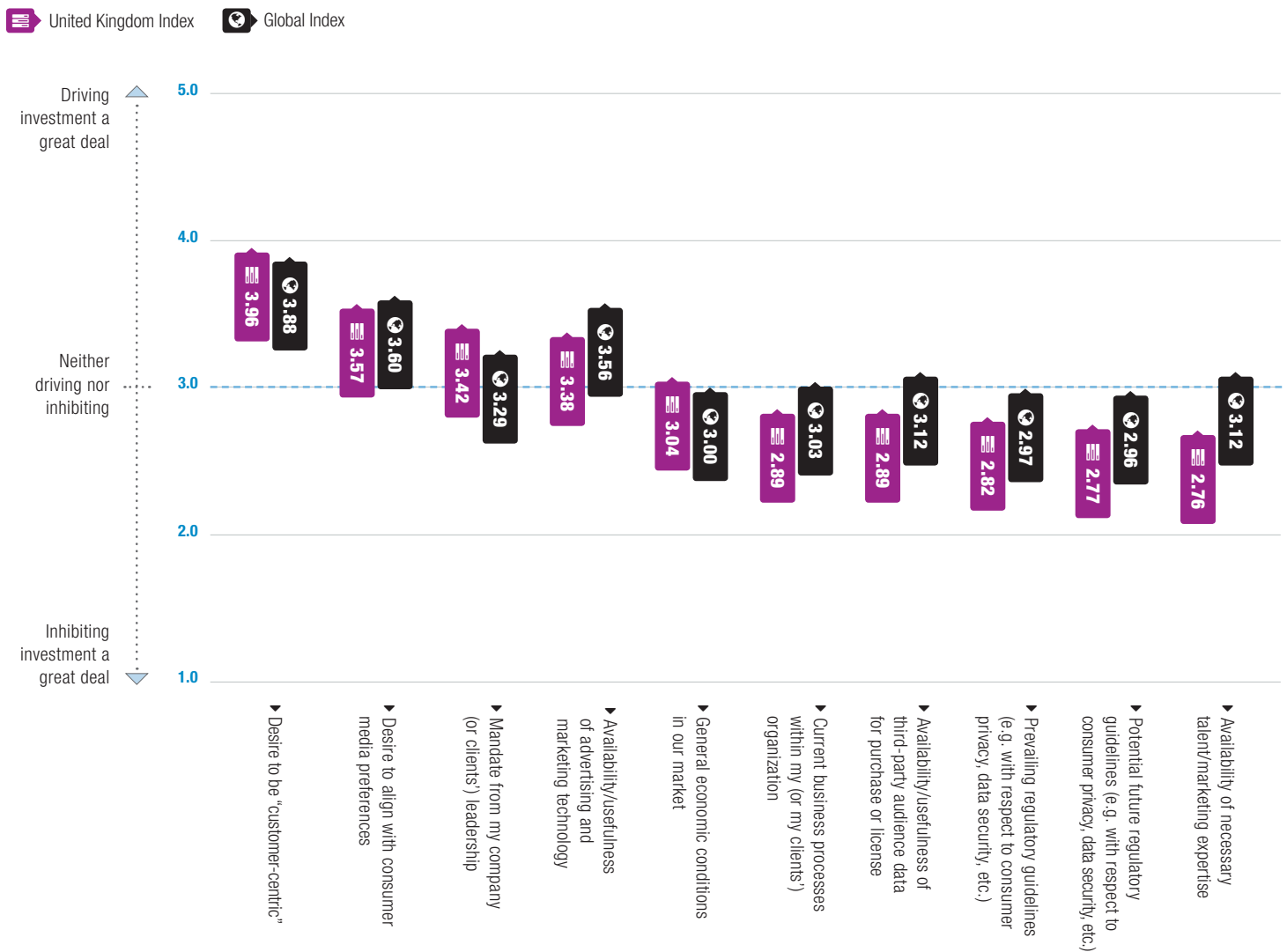
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What's driving the practice of DDMA? What's inhibiting it?

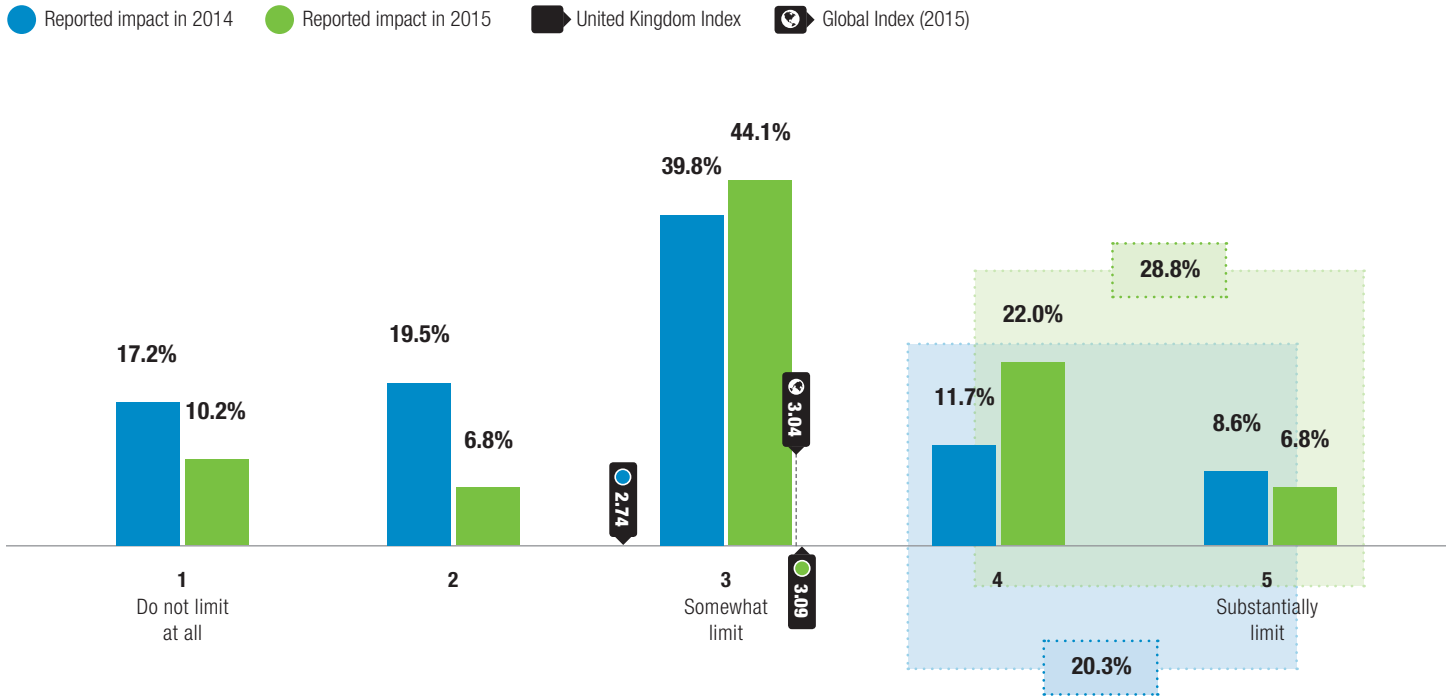
FACTORS DRIVING OR INHIBITING DDMA

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



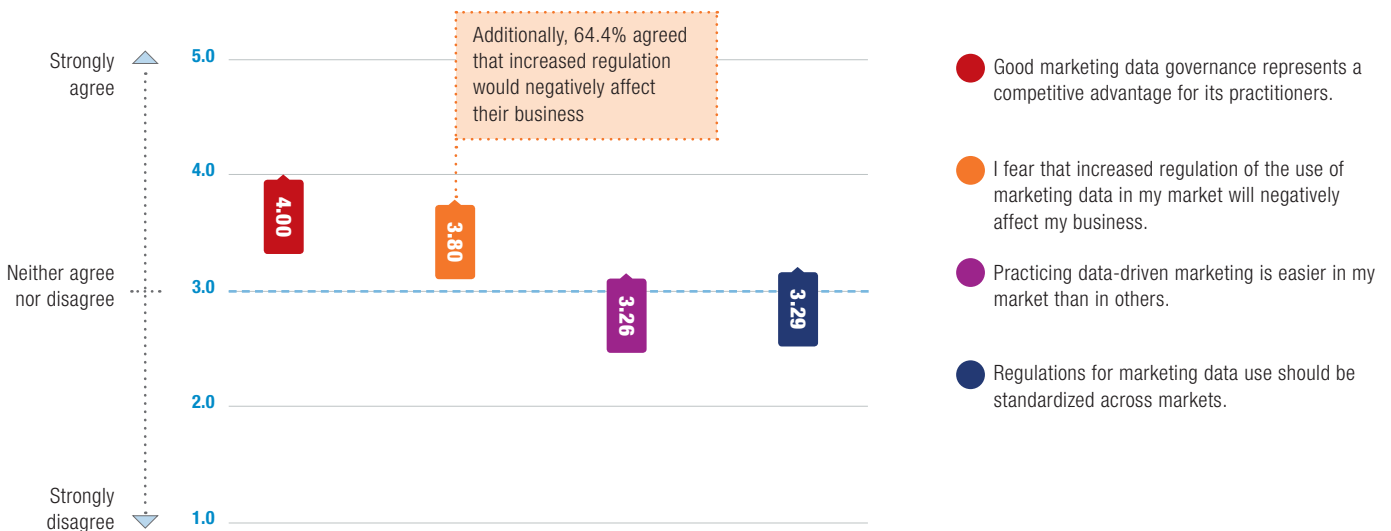
IMPACT OF REGULATION

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?

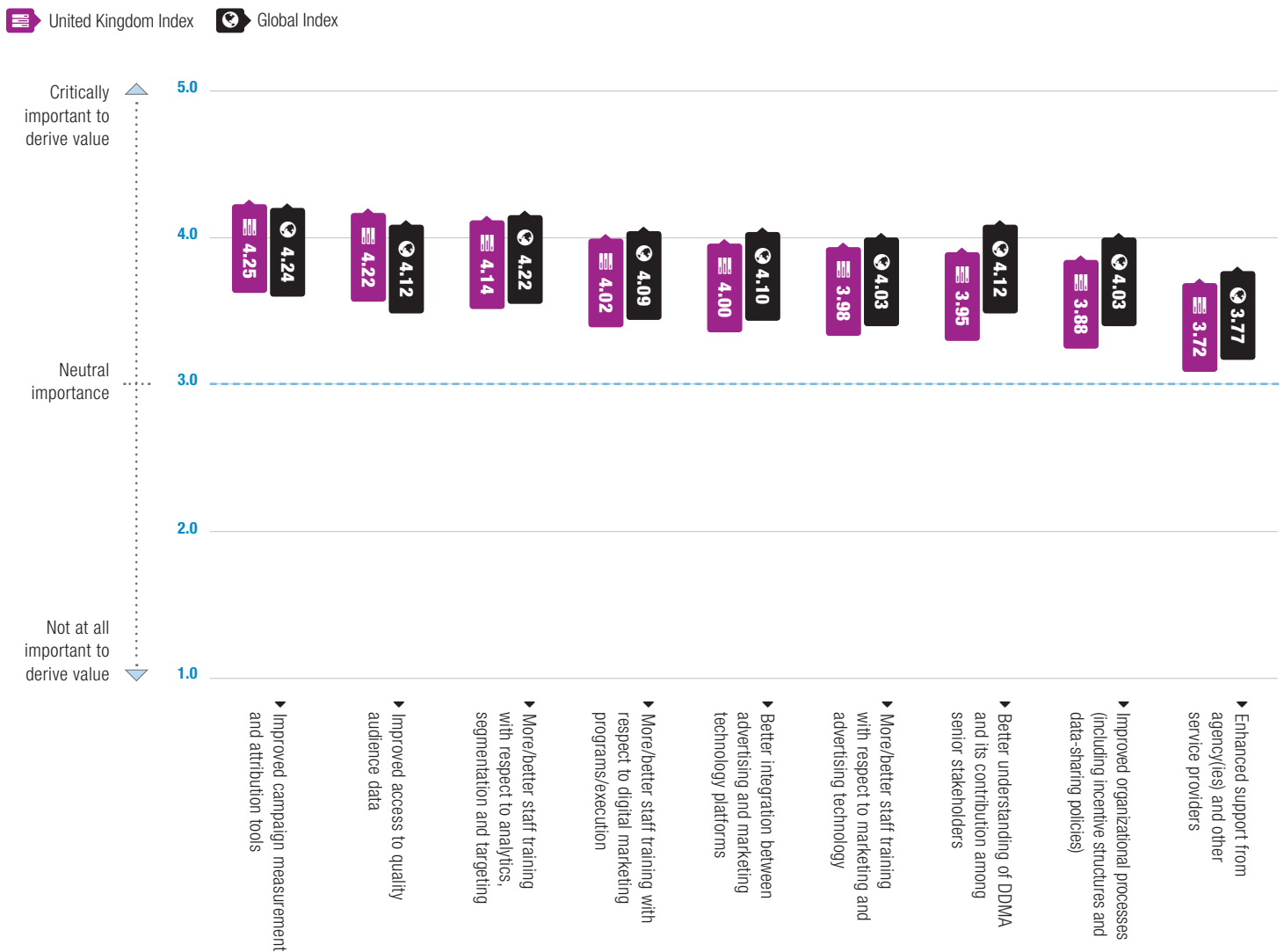


Note: Refer to page 23 of the 2015 *Global Review* for global averages

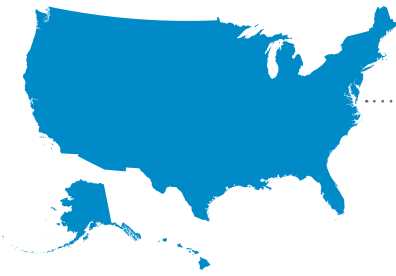
What do practitioners need to derive greater value from DDMA?

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?



United States



United States

PANEL:
422 TOTAL RESPONDENTS*

SURVEY TIMEFRAME:
JULY 2015

* Not all respondents answered every question

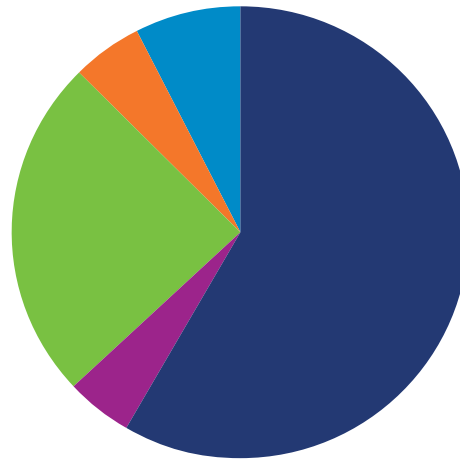
PRESENTING ASSOCIATION

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



PANEL COMPOSITION

How would you describe your principal role/business focus?

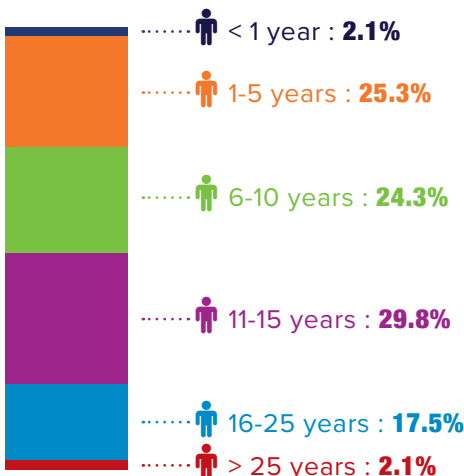


- **MARKETER/ADVERTISER : 58.3%**
- **PUBLISHER/MEDIA : 4.7%**
(focused on selling advertising)
- **PROVIDER OF MARKETING SERVICES : 24.6%**
(including data and agency services)
- **DEVELOPER OF ADVERTISING & MARKETING TECHNOLOGY : 5.0%**
- **OTHER : 7.3%**

EXPERIENCE

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

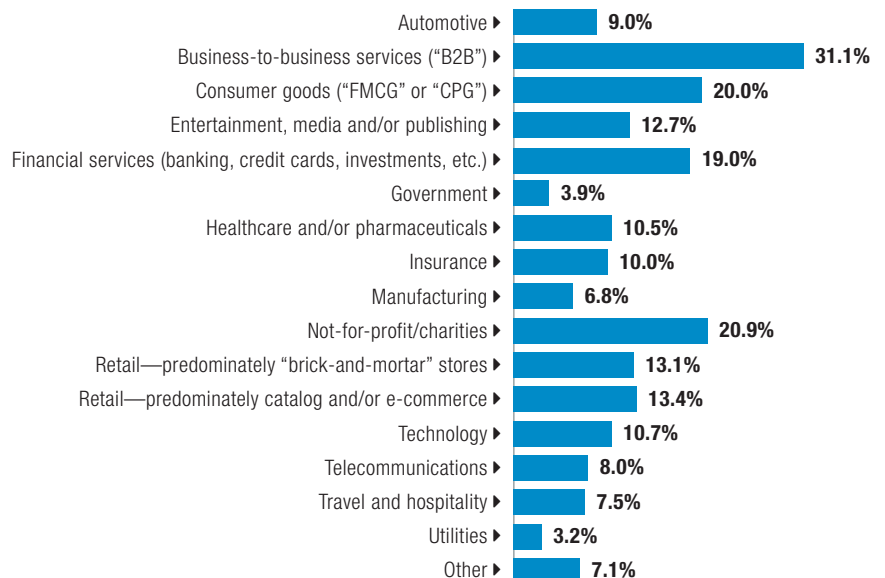
Please consider your current job and past professional roles that may apply.



INDUSTRY REPRESENTATION

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

Displaying panelists' "top three" responses

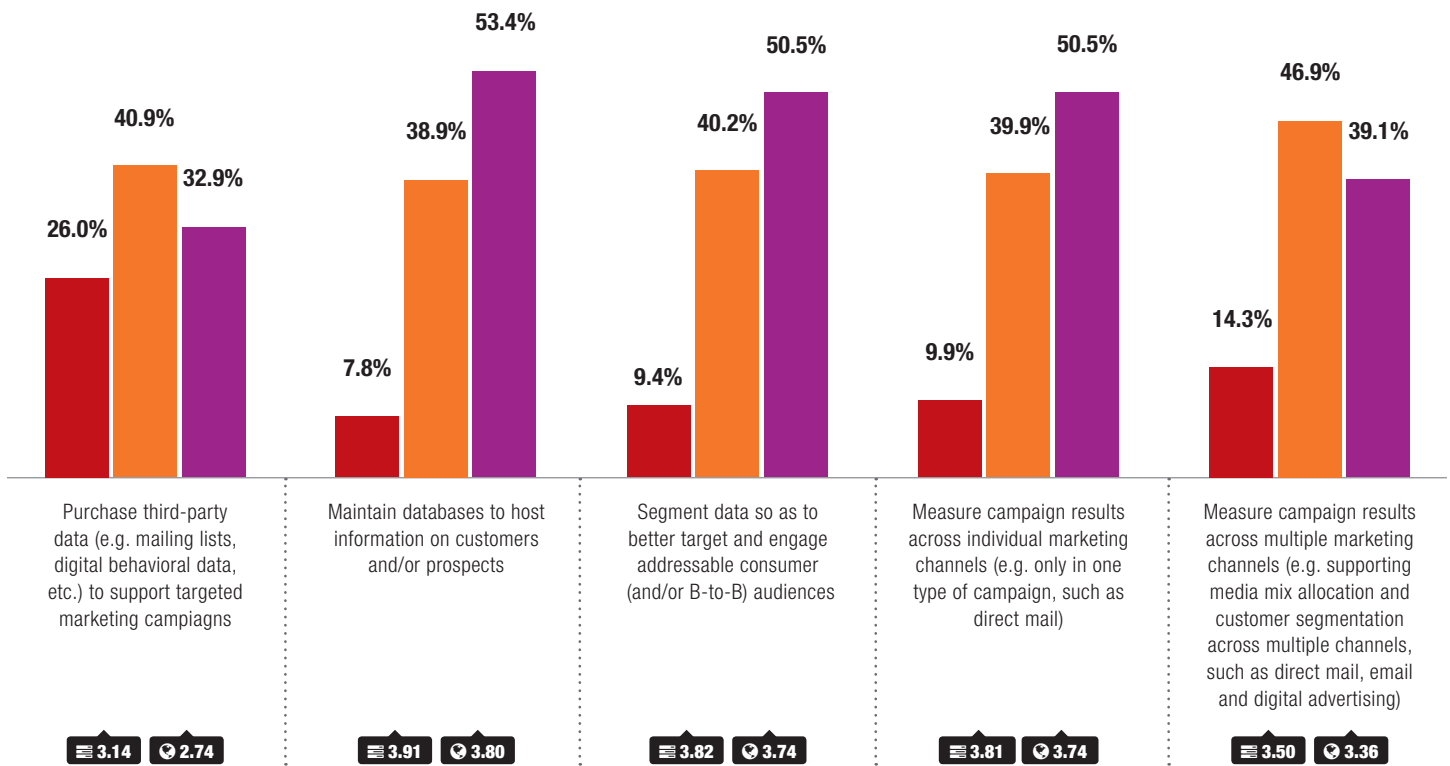


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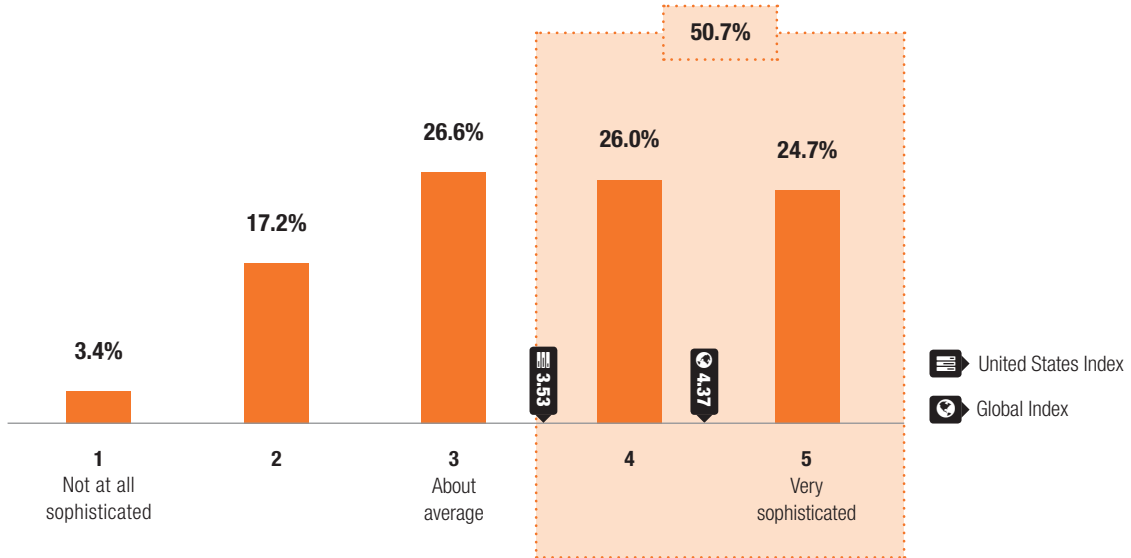
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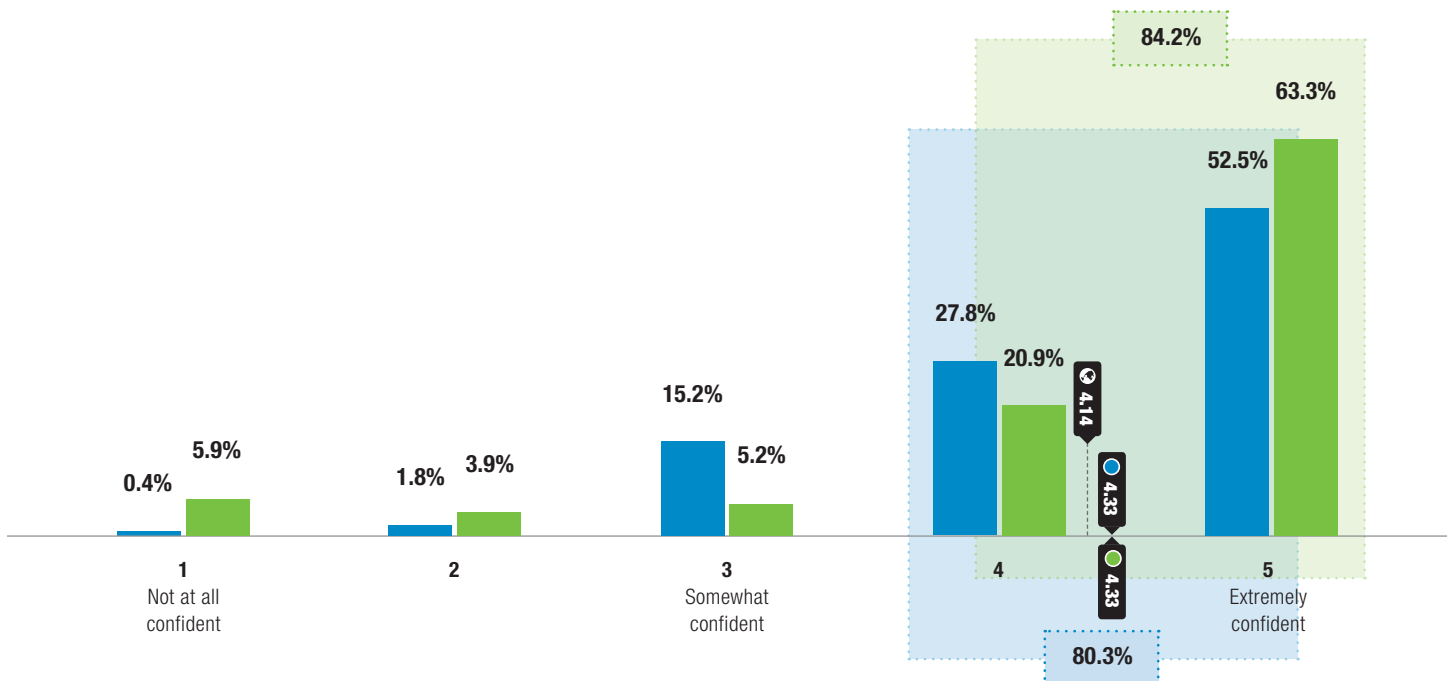
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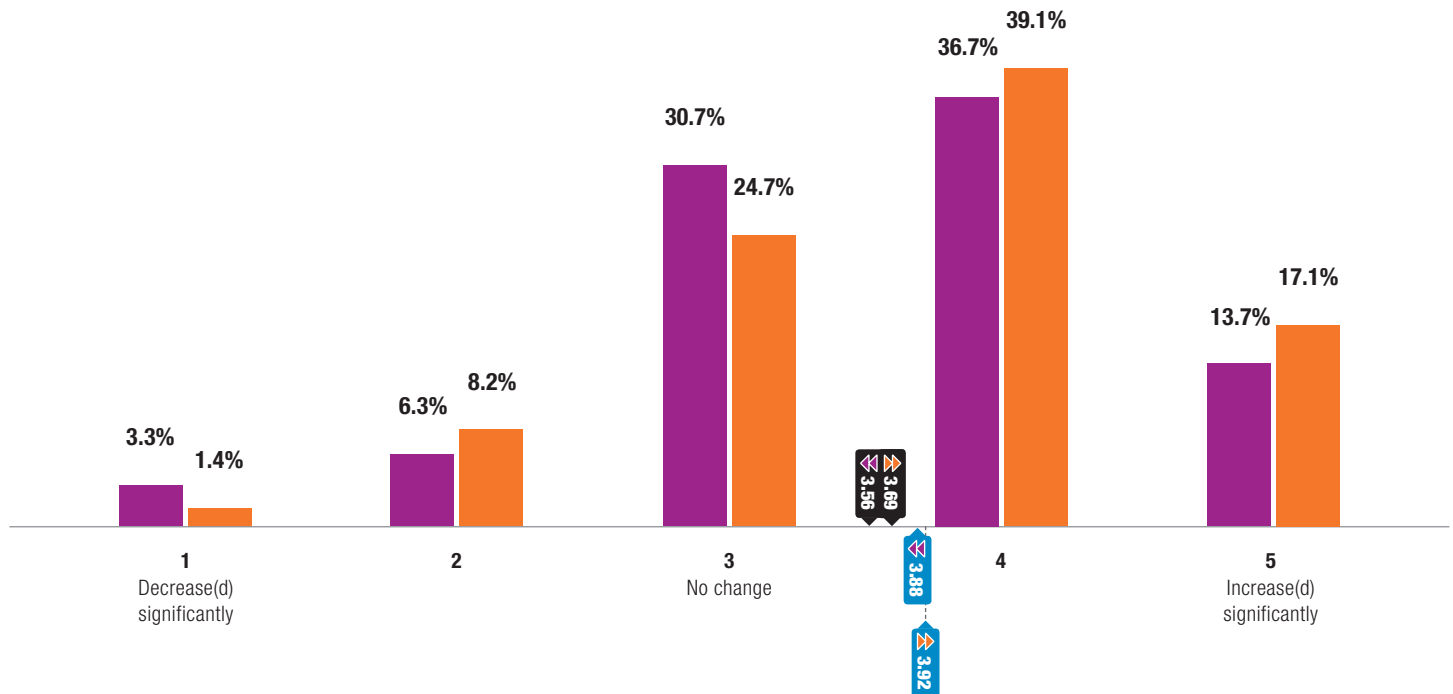


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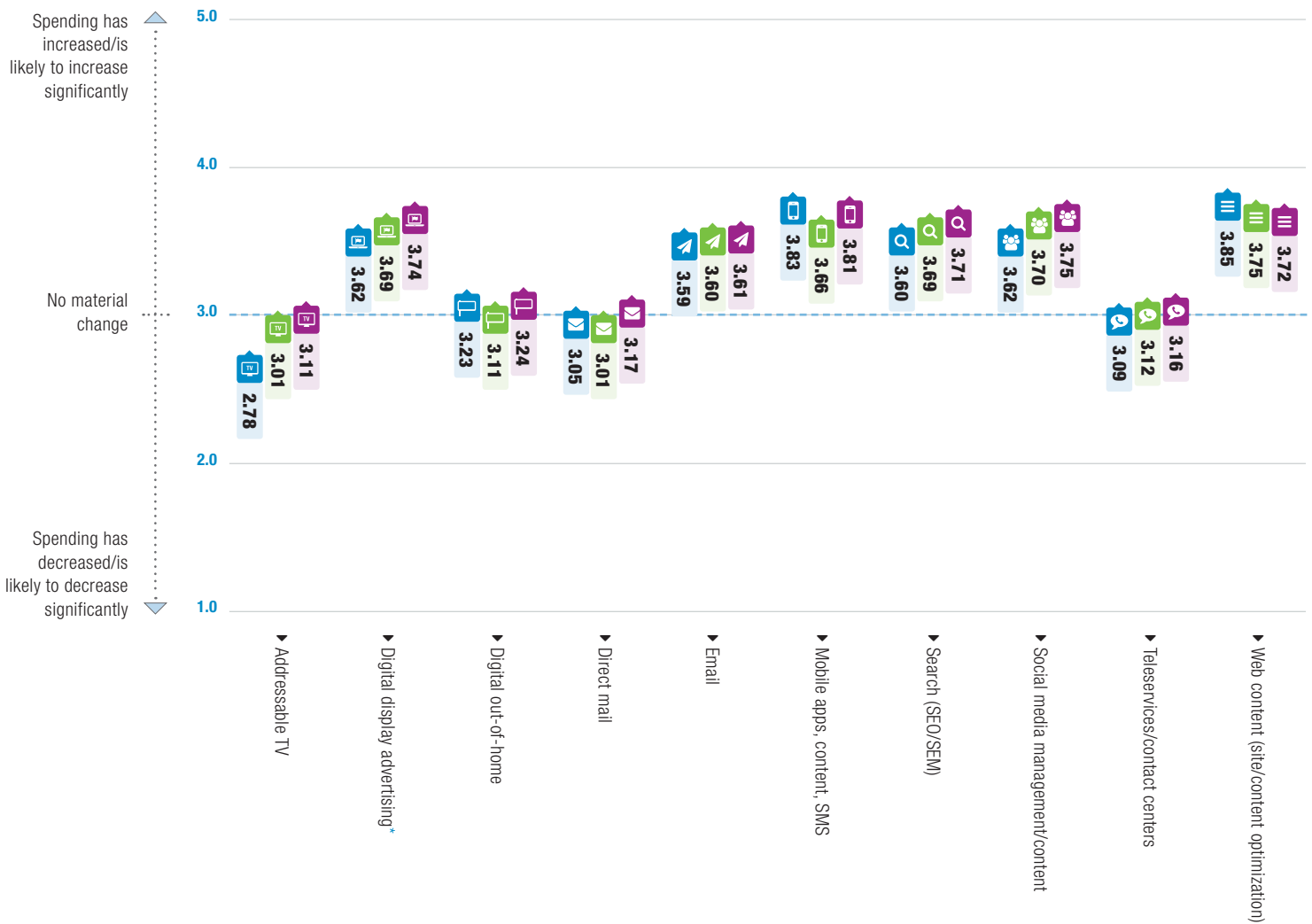


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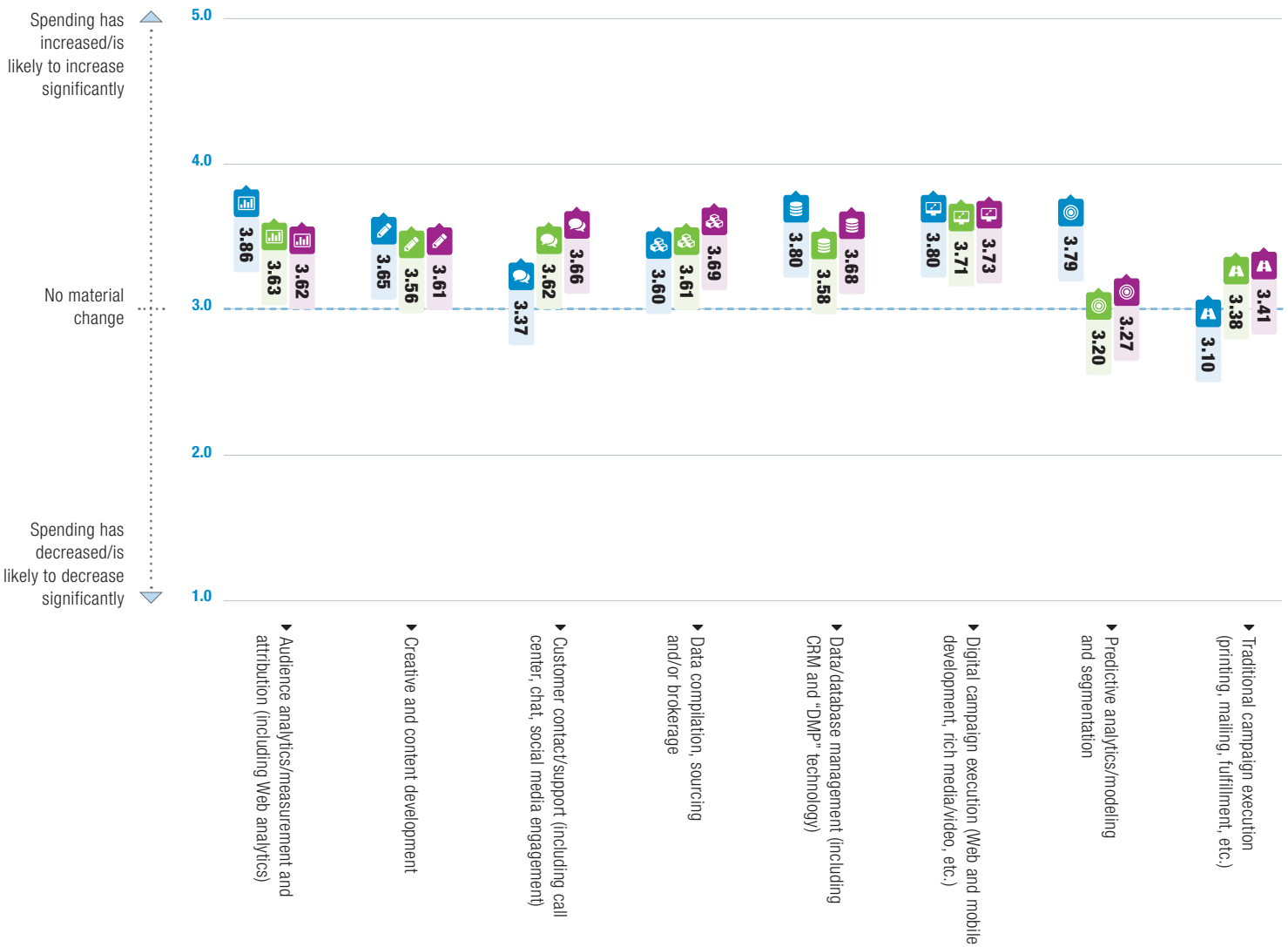
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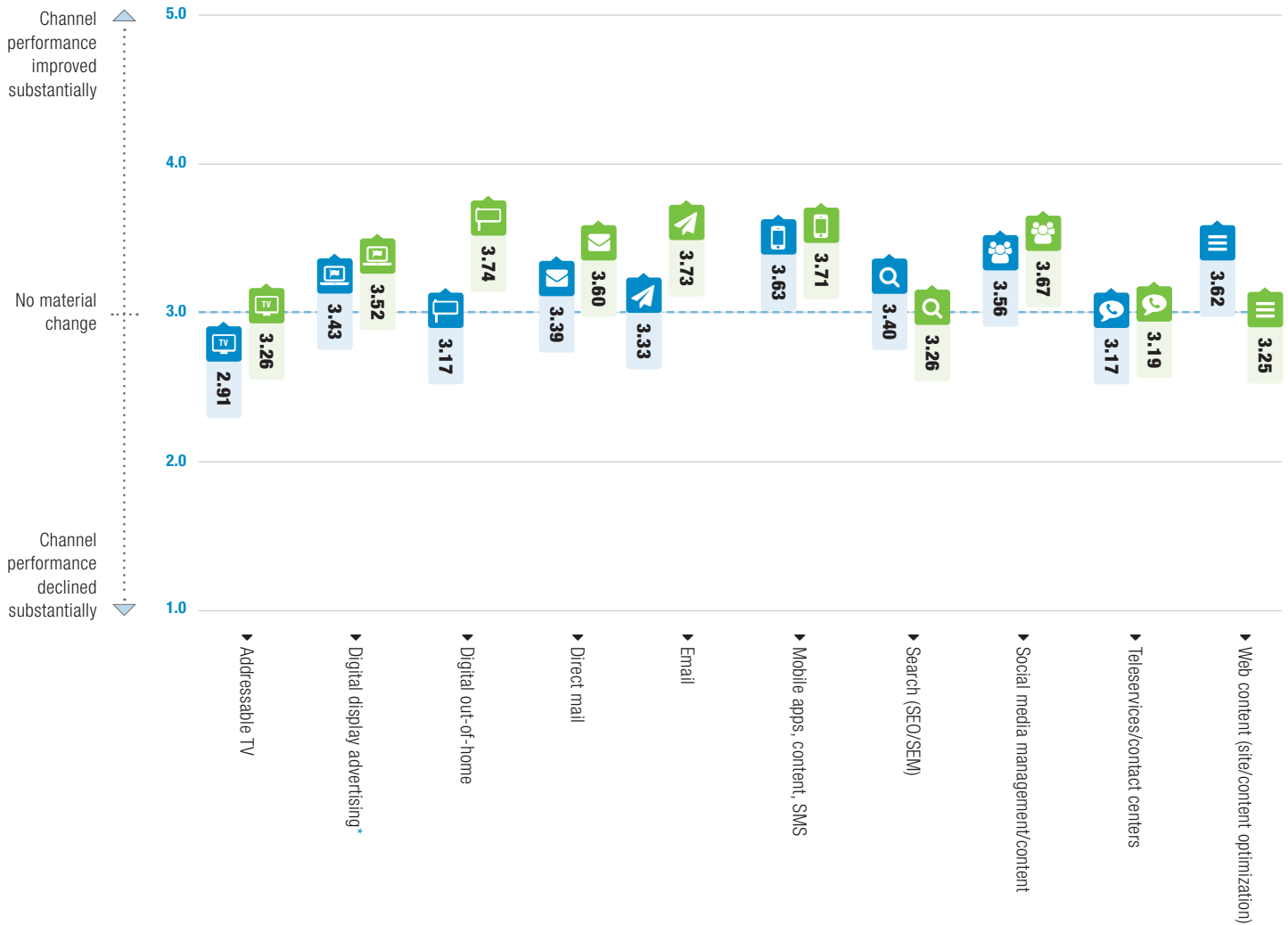


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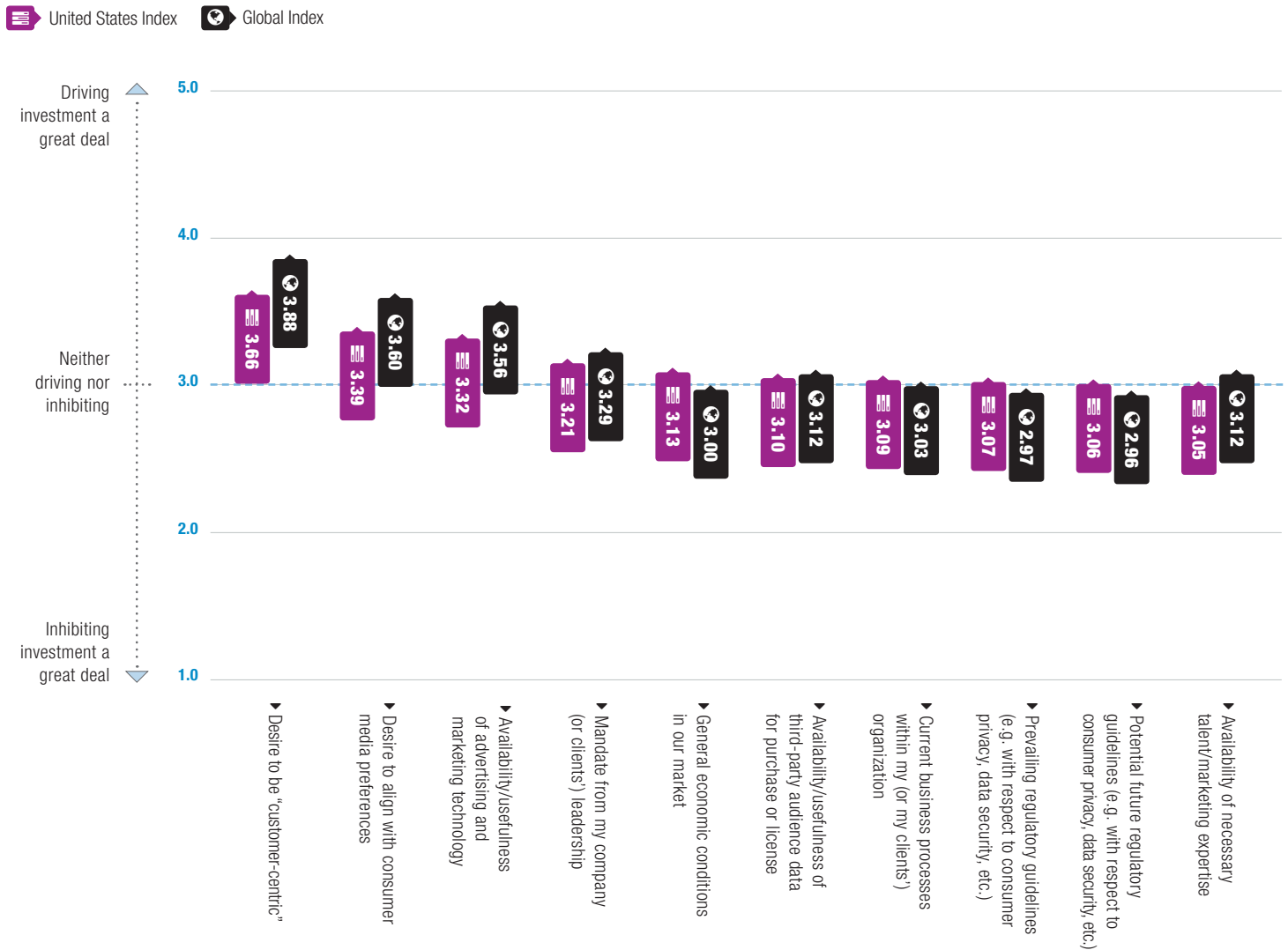
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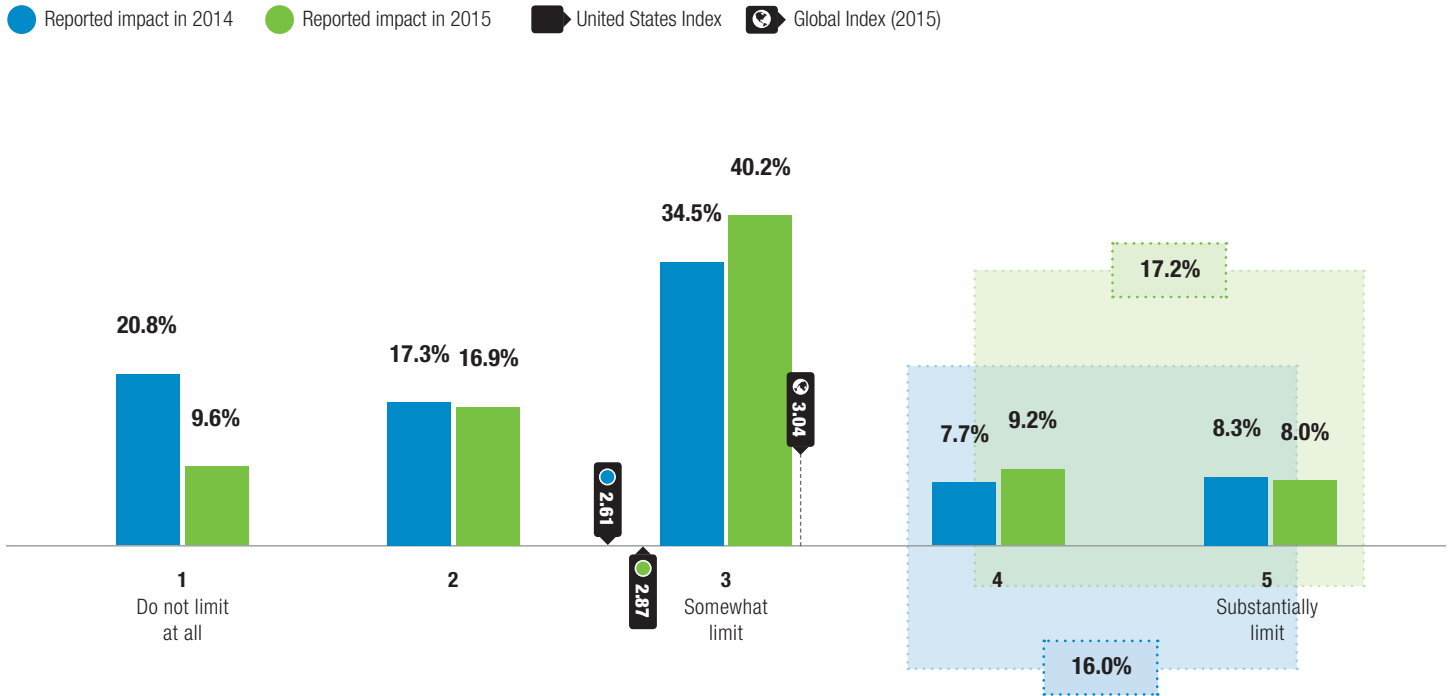
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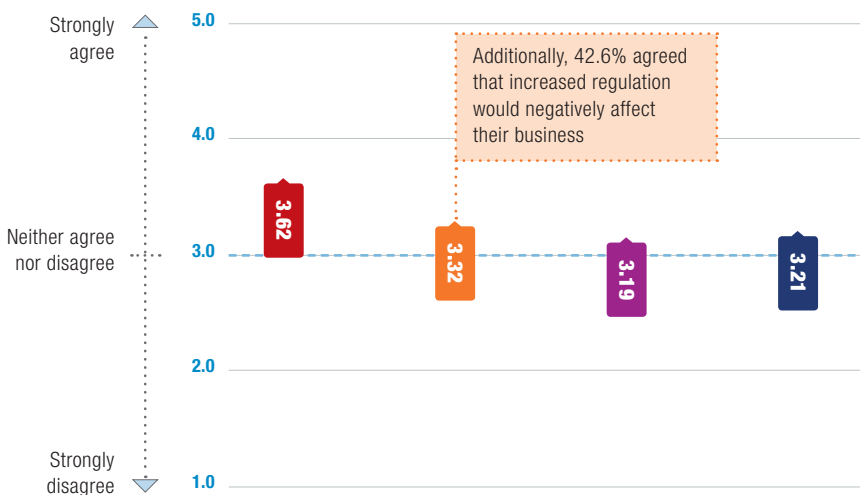
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PERSPECTIVES ON REGULATION

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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United States Index Global Index



Presented by



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



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.

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