

# Adoption vs execution: How media agencies across the globe are making the most of their DMPs' capabilities

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## EXECUTIVE SUMMARY

We undertook this research to uncover the degree to which media agencies across the globe are embracing data management platforms (DMPs).

We sought to answer the following key questions:

- Are DMPs being used by agencies beyond just powering targeted ads?
- Are agencies making the most of their DMPs' capabilities?
- Are agencies in specific regions using DMPs differently and, if so, how?
- What will drive continued, advanced adoption?

Our research finds that while DMPs are commonplace in media agency technology stacks across the globe, a number of agencies are not fully leveraging their DMP to help them meet brand demand for more data-driven strategies.

Despite this, there are specific use cases within the US, EMEA and APAC, which highlight that agencies are beginning to use DMPs for more localised, innovative purposes beyond data unification, audience targeting and analytics.

Our findings reveal that DMPs provide media agencies with multiple opportunities to improve their data strategy. Furthermore, those who take advantage of the full capabilities of a DMP will see demonstrable performance benefits, to such an extent that they view a DMP as 'vital' to the agency technology stack. Today, this can only be said of a third of agencies, and there is a growing performance gap between those who are making the most of the technology, and those who are not.

Within this report we explore how some agencies are pushing the boundaries and using their DMP beyond data unification, audience targeting and analytics; pushing into customer experience, creative and offline media. We expose the cultural and technological influences behind these differences and provide actionable insights to take your data strategy to the next level.

ExchangeWire hope you enjoy the report.



**Becca Muir**

Head of Research & Analysis, ExchangeWire

## FOREWORD

In the world of digital advertising and programmatic marketing, data has grown exponentially in both volume and importance. The use of large data sets in predicting consumer behavior and understanding audiences is more widespread now than ever before. We have entered an era of data-driven marketing campaigns focused on audience engagement and one-to-one brand experiences.

At the heart of this data revolution sits the data management platform, a powerful technology used by companies of every size around the globe to collect, manage and activate data. As specialists in media execution, media agencies are increasingly finding themselves consulting with marketers on their use of DMP technology, and are being relied upon more and more to plan, activate and optimize audience-targeted campaigns on behalf of their customers.

DMPs give agencies the ability to centralize and manage their disparate databases, analyze their marketing efforts, inform content management systems, and offer additional insights into their target consumers and how to reach them. The consumer journey is often fragmented and confusing, but DMPs can help unearth the very factors that influence purchase decisions. These insights can then be fed into the creative design process and overall marketing plan to inform truly data-driven marketing strategies. By helping advertisers better understand who it is they are selling to, where and when they can reach them, and how likely they are to engage, agencies find themselves in a position of power and influence.

In this report you'll find that agencies fighting to differentiate themselves have begun adopting the DMP as a vital part of their business, in order to make both their internal teams and their clients smarter. Those that have invested the money, effort and resources into making the DMP a vital part of their business are using the DMP in more innovative and advanced ways — and improving their clients' return-on-investment (ROI) from their ad spend.

As the leading independent DMP, Lotame knows how valuable adoption, and proper integration, of the DMP can be for media agencies. We wanted to explore the correlation between integration and success, as well as the differences between the diverse regions we serve. This report offers insight into marketers' demand for data strategies.



**Megan McKenna**  
VP Marketing, Lotame

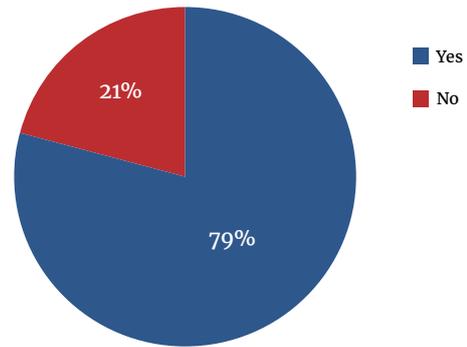
## FINDINGS

### DMPs: A mainstay in the majority of global media agencies

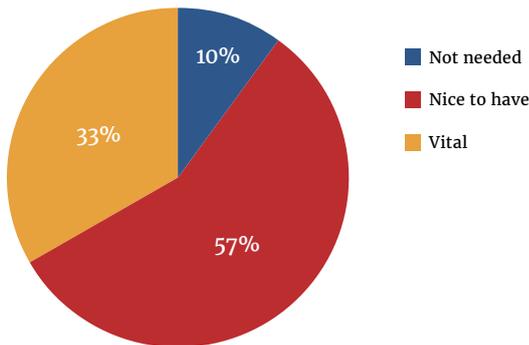
The presence of DMPs within the agency ecosystem is widespread. Globally, 79% of agency-side media buying professionals use DMP technology (figure 1). There is little regional variation (EMEA 76%; APAC 81%; US 80%).

This figure can be viewed as very strong, especially given that research ExchangeWire conducted in July 2015 showed 53% of media buyers had a DMP solution in place — representing a potential percentage increase of 49% in just two years.

**Figure 1: Do you use any form of data management technology (DMP)?**



**Figure 2: How important is the DMP to the agency technology stack?**



When asked why the adoption of the technology has increased recently, Wojciech Bednarz, Data & Insights Senior Strategy Manager, Greenlight Digital (EMEA) says that the uptake is symptomatic of “Agencies’ desire to increase their competitive edge”. He explains that, “as the amount of data that agencies hold at their fingertips rises, an umbrella solution is becoming a necessity nowadays.”

Rohan Mehrotra, Head of Trading & Product, Sparcmedia (APAC), agrees. He says: “Because ad tech is evolving so

rapidly, and is generating so much data, the need to warehouse and manage audiences (and the data associated with those audiences) in an executable format has become an integral necessity.”

### Making the most of the technology

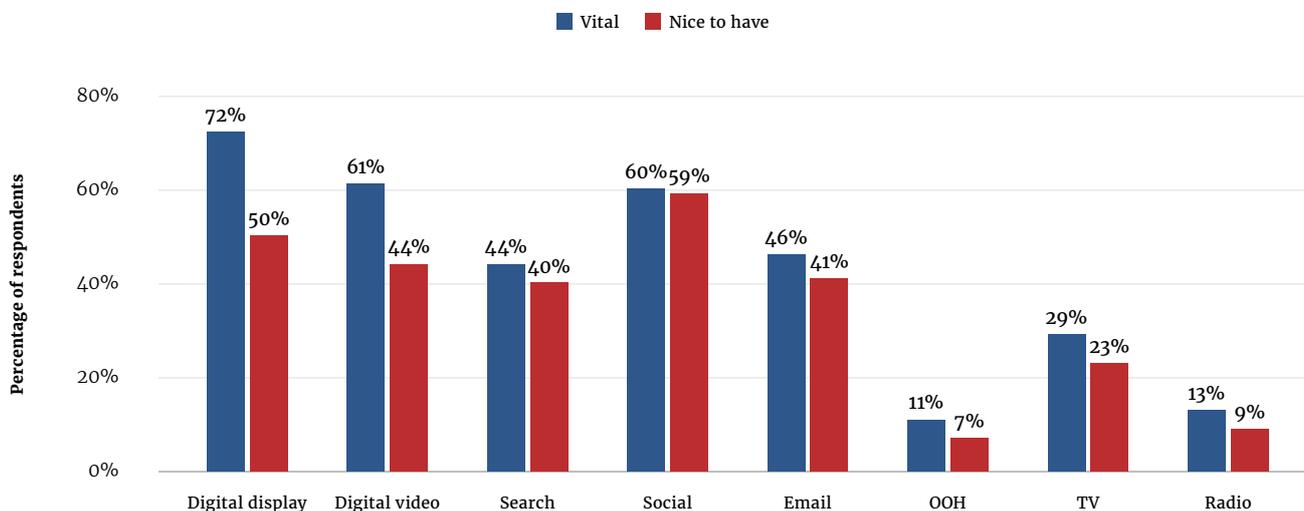
The high level of DMP adoption suggests that agencies recognize the importance of a data strategy. However, only 33% say DMPs are ‘vital’ to the agency technology stack (see figure 2), compared to nearly six in 10 (57%), who rate it as ‘nice to have’.

This shows a disparity between adoption rates and the proportion of marketers who view DMPs as vital. When examining the data, we find two possible reasons agencies rate the DMP as vital to their technology stack.

- 1. Wider channel execution:** Figure 2a shows that those who consider the DMP vital are putting data strategy to use more across every channel — digital and non-digital. Rather than simply owning the technology in order to keep up with competitors (as it appears those who select ‘nice to have’ are doing), we hypothesize that the ‘vital’

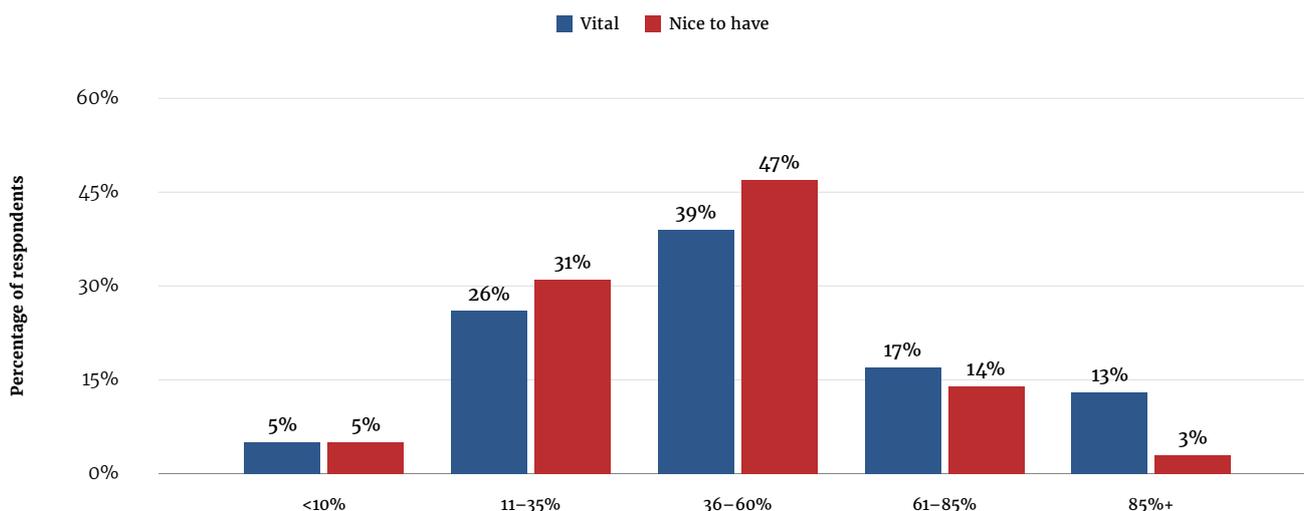
group has realized the wider reaching benefits of the DMP, and are looking to instill these benefits across all channels.

**Figure 2a: On which channels are you implementing your data strategies?**



**2. Winning new business:** We believe progressive agencies are taking on the role of data consultants to build deeper relationships with their clients. New business teams in these agencies are seizing the opportunity to highlight the agency's data capabilities in pitches, which is causing them to view their DMP as vital to the tech stack. This hypothesis is supported by the fact that 30% of our 'vital' group are highlighting their ability to improve data strategy in over 60% of pitches (see figure 2b). By comparison, only 20% of those who rank DMPs as 'nice to have' use data strategy to the same extent.

**Figure 2b: What percentage of your new business pitches involve data strategy?**

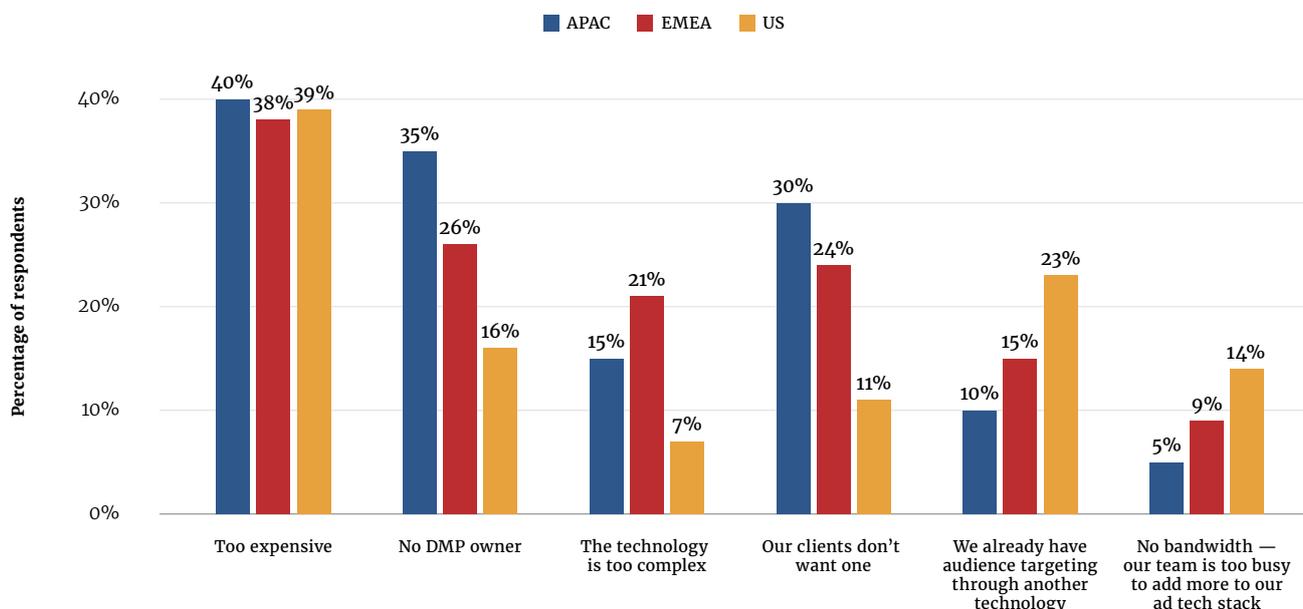


Michael Beach, CEO, Cross Screen Media (US), says that more progressive agencies realize that brands are becoming increasingly demanding of agencies when it comes to their data capabilities: *“Buying digital media against data has become table stakes for many brands, but the ability to put data at the center of your organization is where everyone is racing towards now”*.

From our thought leaders' comments we can tell that brands are attempting to deploy more data-driven strategies. Figures 2a and 2b show that it is those who are making the most of their DMP's capabilities that are more apt to leverage data strategy in new business pitches to meet brand demand for data. The benefits these agencies are seeing because of these new business wins explains why this group views DMPs as 'vital'. On the other hand, those who do not view the technology as 'vital', rate it as less important because they have not realized the benefits of implementing a DMP-driven data strategy intensively across every channel, or using a DMP-driven data strategy to win business.

### Challenges to adoption

**Figure 3: What are the challenges stopping you from implementing a DMP solution?**



Despite what can be considered high adoption rates, 21% of respondents still say they do not have a DMP. Here we look at the major challenges that currently prevent this group from adopting a DMP.

Price is the biggest issue for non-adopters. Globally, 39% cite price as a reason they have not implemented a DMP.

It is interesting to note that 30% of APAC respondents who do not use a DMP report not implementing the technology because their clients don't want one (compared to 24% in EMEA and 11% in the US).

It stands to reason that if APAC advertisers have not yet understood the wide-reaching benefits of DMP, (beyond audience targeting and data unification) they may be reluctant to invest in expensive new technology. On the other hand, only 11% of US agencies report their clients do not want a DMP as a barrier to adoption, perhaps due to the fact that this region was an earlier adopter of the technology and has therefore had longer exposure to its benefits, meaning client demand is strong.

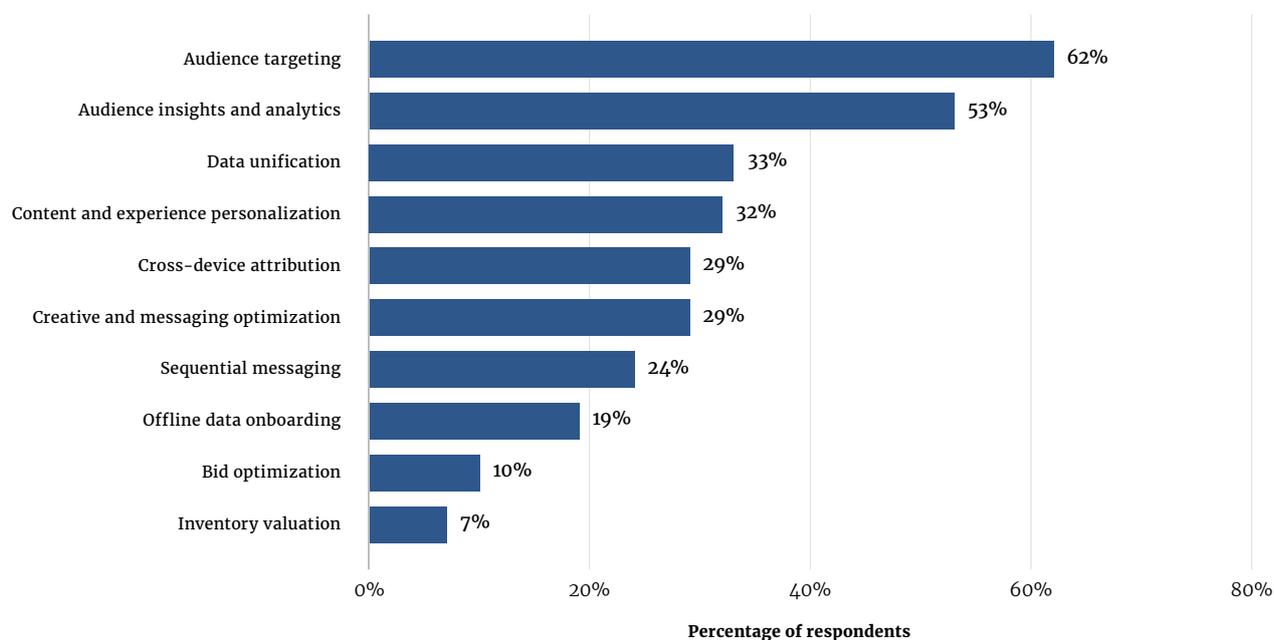
Additionally, 35% of those without a DMP in APAC cite the lack of a DMP owner as a challenge. We predict this will change over the next year as DMP technology use becomes more widespread in this region, supported by the fact that this figure is significantly lower in EMEA (26%) and the US (16%), where the technology is more established (figure 3).

Barriers to DMP adoption are different within US agencies. As audience targeting technology is deeply embedded and its use is more mature within American agencies, we are seeing an overloaded ad tech stack, and agencies already using similar technology to DMPs. This is symptomatic of a market which fully understands the benefits of data management, and has already invested heavily in early solutions.

### DMPs for differentiation

We asked our respondents to select their top three uses for DMPs. Globally, we see DMPs are primarily used by agencies for audience targeting (62%), audience insights & analytics (53%), and data unification (33%), which is not surprising as these are all rather elementary use cases of the DMP technology (figure 4).

**Figure 4: What are your primary uses for your DMP?**



While we would perhaps expect these to be the key uses cases for DMPs, **figure 4** highlights that agencies are starting to use the technology for more niche use cases, such as: Offline data onboarding (19%); Bid optimization (10%); and Inventory valuation (7%), thereby making the most of the available capabilities.

Almost a third (32%) of respondents use DMPs for content and experience personalization, 29% for cross-device attribution, and another 29% for creative & messaging optimization. Today's high adoption rate (79%) for DMPs within the agency ecosystem means that in order to stay competitive, the more sophisticated and inventive DMP users have a better chance at coming out ahead. Lotame Founder & CEO, Andy Monfried, explains, "DMP adoption in agencies is at an all time high. The differentiation now lies in HOW agencies are using the DMP, not IF they're using one. Those who are harnessing the full capabilities of the technology are — in many cases — seeing greater efficiency, effectiveness and success." With this in mind, we asked our contributors how they are using their DMPs, beyond the more traditional use cases.

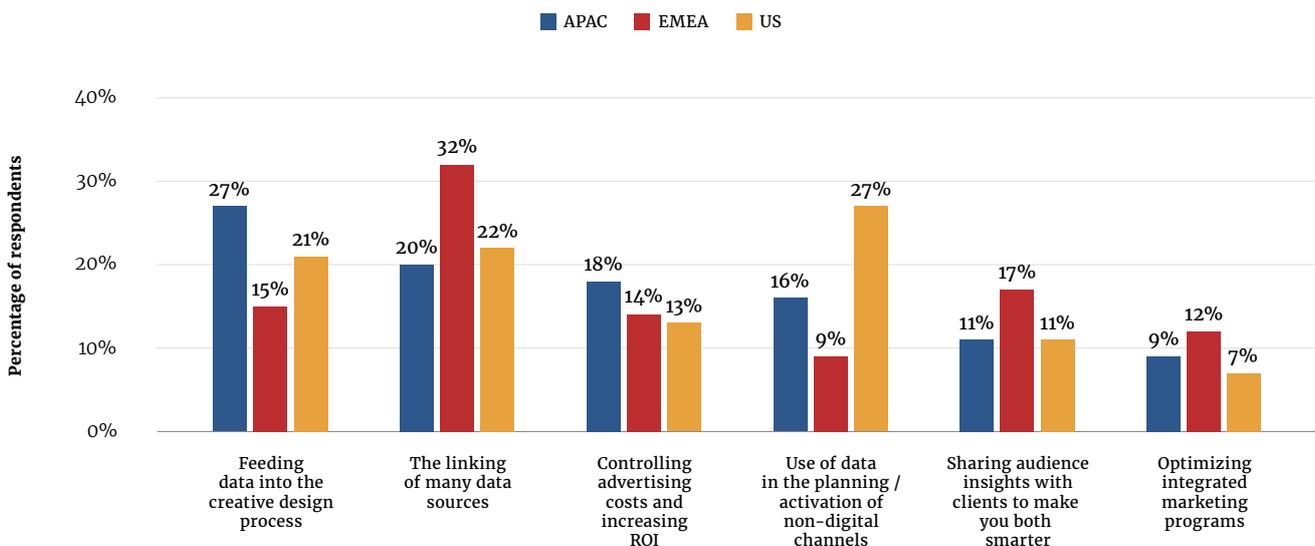
Elie Milan, Associate Director, Social Performance, Publicis Media (EMEA), explains that, while data unification is his key use for DMPs, the opportunities enabled by the technology go beyond this: "We benefit from the DMP's cross-device identification capabilities to properly size and activate against our target audiences, as well as leveraging audience data to deliver personalized messaging at scale."

Feliks Malts, Vice President, Decision Sciences, 3Q Digital (US) says that, although audience analytics, insights and targeting strategies are the key uses for the DMP, the technology is extremely useful when it comes to creative and messaging optimization: "[Audience insights from our DMP] allow us to leverage our data to ensure that we're targeting the right people, on the right channels, with the right frequency and messaging at the right time in their journey."

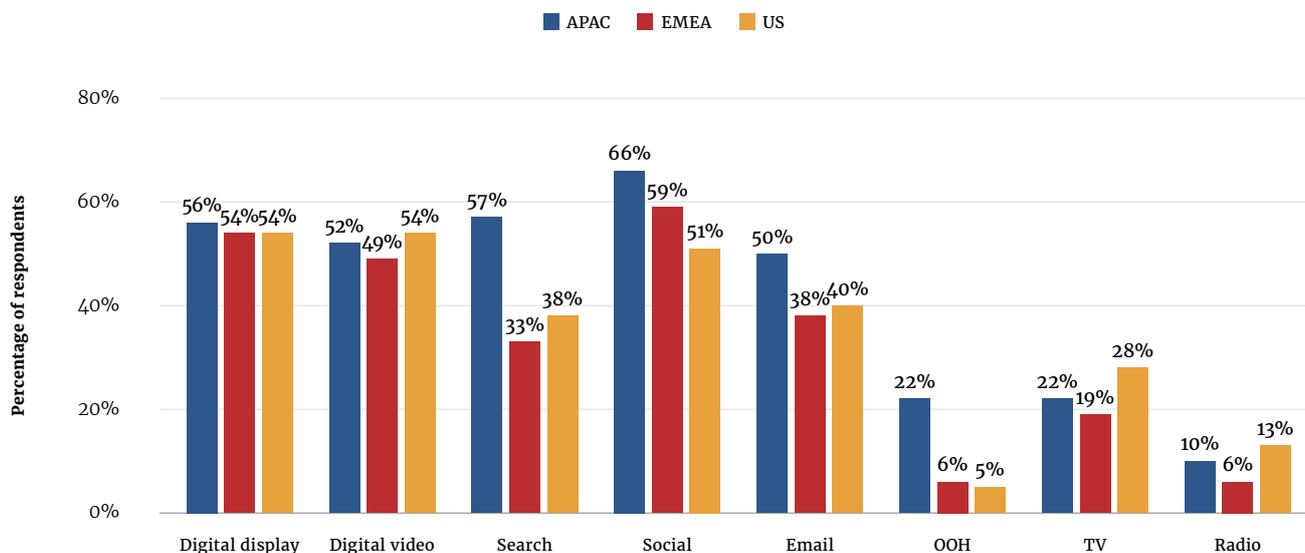
## Regional variations

In this section we explore some of the geographical variations we found when we asked respondents about data and channel integration, and opportunities for future uses of DMPs.

**Figure 5a: What is the biggest opportunity for agencies investing in DMP solutions?**



**Figure 5b: On which channels are you implementing your data strategies today?**



**US: Supporting non-digital channels**

Figure 5b shows that agencies in the US are implementing their data strategy beyond digital channels — especially TV (28%) and radio (13%) — more intensively than other regions. As such, they identified the planning and activation of non-digital channels as the best opportunity for their DMP (see figure 5a).

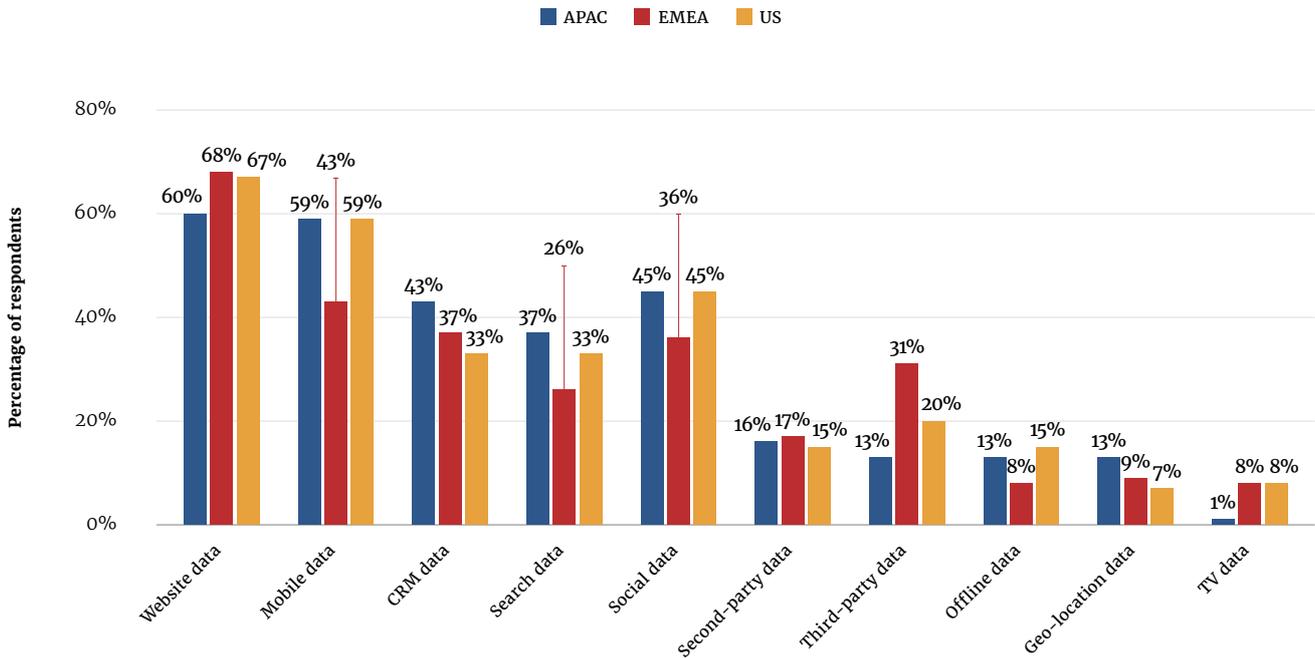
To do this, they are routinely using website (67%) and mobile data (59%) within their DMP (see figure 5c). Given the huge amount of data available to agencies from website and mobile touch points, it is unsurprising to see offline data (15%) rank as less important than mobile or web sources.

Beach (US) feels that this investment in linking online and offline activity may be due to the level of maturity in the US. He says: “Agencies and brands [in the US] have become accustomed to the efficiency and addressability of digital and now want to port much of that to the traditional side”.

Unlike agencies in the US, those in EMEA and APAC are not focusing on using their DMP to activate across non-digital channels. This could be due to the fact that DMP technology has been used for longer by US agencies, and they are now trying more untested use cases for their DMPs, especially across traditional, offline media. The impending implementation of the European GDPR, which will make it harder to collect personally identifiable information, makes it easy to understand why offline activation is more of an important opportunity in the US (cited by 27%) compared to EMEA (9%).

Beach (US) goes on to say: “The availability of set-top box data has been a game changer, since it allows a brand to understand how many impressions of traditional advertising are actually hitting their specific target, as opposed to a traditional demographic segment.”

**Figure 5c: Which data sources are the most important to the success of your campaigns?**



Malts (US) agrees that there is a significant benefit in using DMPs to activate non-digital channels, as they offer: *“The ability to understand who our clients' customers are in the digital space. This gives us the capacity to inform targeting, which can apply to offline channels like direct mail, catalog, and even email, to help reduce costs and deliver [success] more efficiently. It can also help drive consistency in messaging across online and offline [channels], since a lot of the data attributes that we have available in a DMP are also accessible in customer data appends.”*

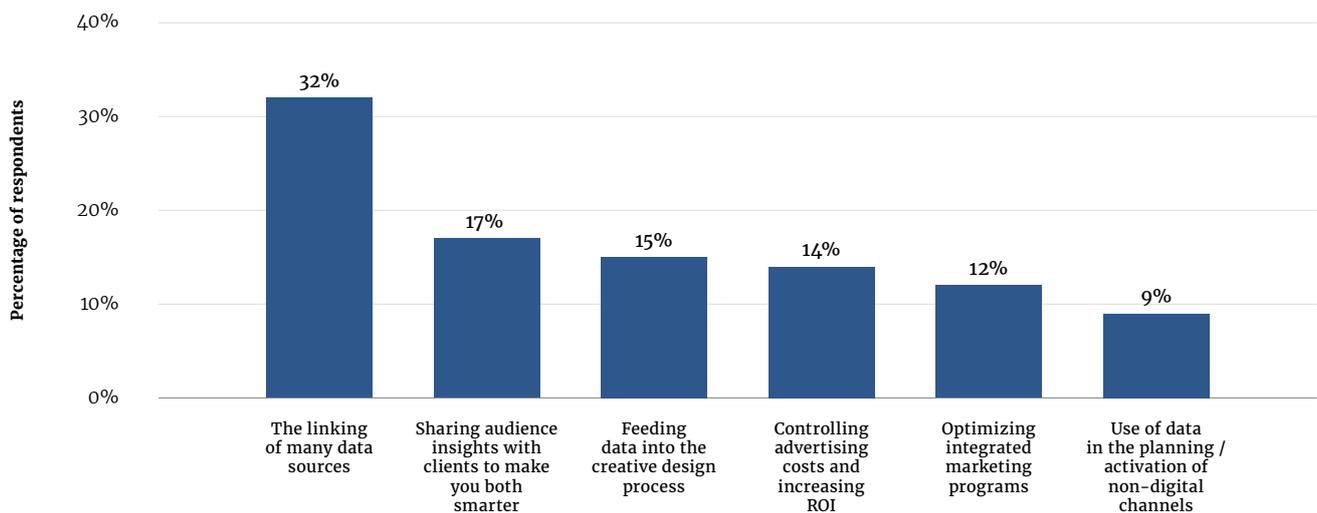
On the whole, the US is the most mature region studied, in terms of its use of DMP. Not only have eight in every 10 US agencies already embraced the use of a DMP and see it as important to their business, but those agencies are accustomed to the DMP's capabilities in forming online audience segments, and are now looking to extend these audience building capabilities to offline channels.

It is also interesting to note that 11% of US agencies listed sharing audience insights with clients to make both parties smarter as an opportunity for agencies with a DMP. Despite this, 27% are using data strategy in over two-thirds of new business pitches, the highest percentage in any of the regions examined (figure 6b). With a high proportion of agencies already sharing insights with clients (both current and prospective), it seems that this has become the status quo for agencies in the US, meaning they do not recognize it as a significant opportunity.

**EMEA: Increasing insights for clients**

While the US stated the biggest opportunity for DMPs was activating non-digital channels, in EMEA, one third (32%) say ‘linking many data sources’ is the biggest opportunity (figure 6a).

**Figure 6a: What is the biggest opportunity for agencies investing in DMP solutions: EMEA**



Milan (EMEA), points to the fragmented nature of the EMEA market (more than 40 individual markets) when examining these findings. “Across EMEA there is significant diversification in technology and data availability as well as capabilities. Local markets have their own technology ecosystems to navigate, and specific data operators to integrate. This makes unification and centralized activation of the tech and data ecosystem even more important”. The theory that fragmented regions are using DMPs to link multiple data sources is supported by the fact that this is also ranked as the second biggest opportunity in APAC (20%), which is as fragmented and diverse as EMEA. The same cannot be said for the US.

Bednarz (EMEA), agrees that the ability to link data sources is important and will help tie information from all channels together: “Understanding the value across all touchpoints has become a must-have for most businesses these days”.

The second biggest opportunity identified by EMEA agencies is sharing audience insights with clients to make both parties smarter (17%: figure 6a). This figure is higher than in both the US and APAC (which both record 11%). The results highlight that, although agencies in EMEA implemented the technology later than US agencies, they are quickly realizing the full benefits of DMPs in terms of improving audience insights. They have recognized that this will not only be of benefit to themselves, but also existing and potential clients. It is likely this has come about through seeing proof of the improvements in audience insights for US agencies using DMPs in the form of case studies.

**Figure 6b: Percentage using data strategy in over 60% of new business pitches**

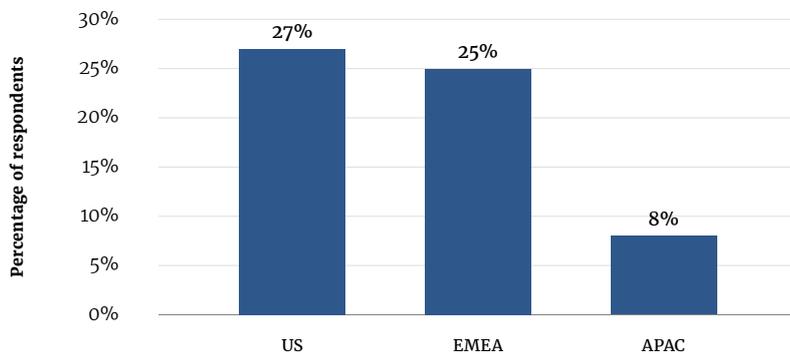


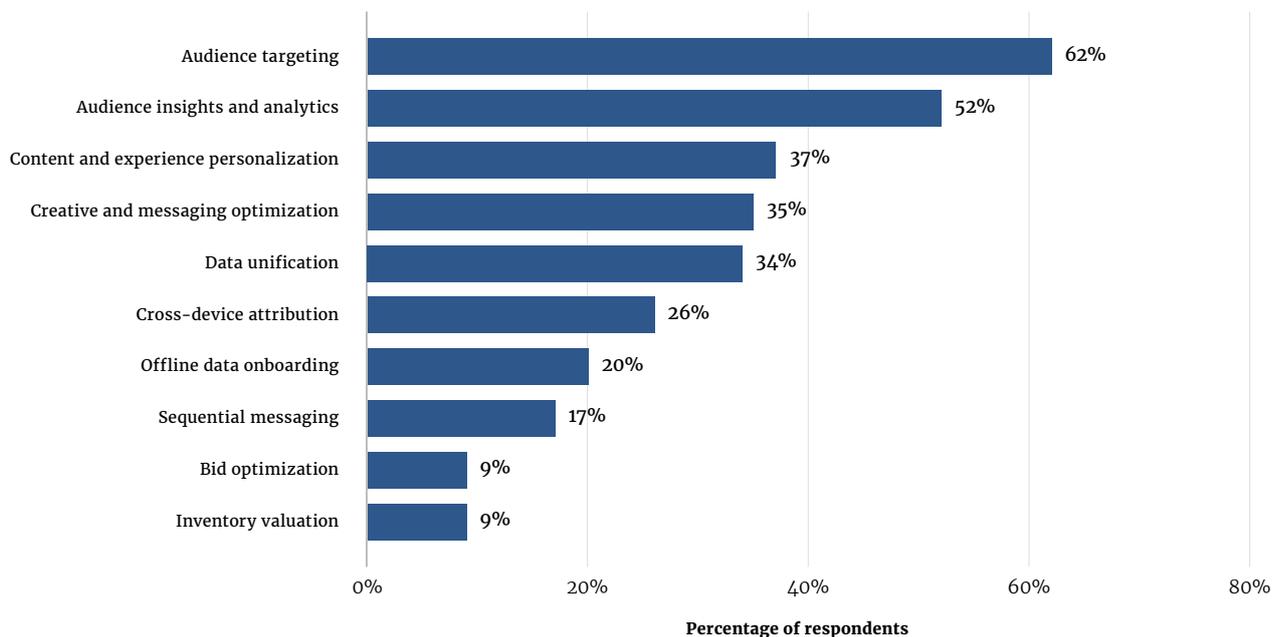
Figure 6b shows that, despite more recent adoption of the technology than US agencies, a quarter (25%) of EMEA agencies are using data strategy from DMPs to win business more than 60% of the time. This is almost at the same level as American agencies (27%), who have had longer to realize the full benefits of DMPs, when it comes to impressing clients.

Overall, we see agencies in EMEA looking to DMPs to help navigate a fragmented tech and data ecosystem, by linking data sources. Despite a later uptake in DMP adoption in EMEA than in the US, agencies in the region have quickly realized the benefits of the DMP, possibly due to understanding advanced use cases from US agencies.

Overall, we see agencies in EMEA looking to DMPs to help navigate a fragmented

**APAC: Improving digital creative**

**Figure 7a: What are your primary uses for your DMP? APAC**

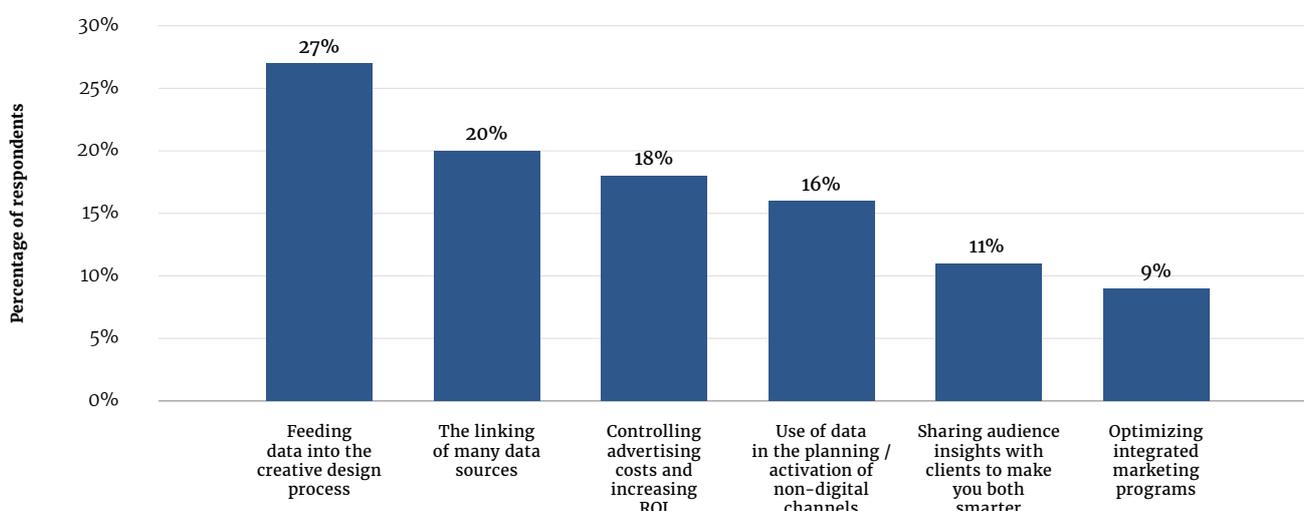


While APAC agencies put a large emphasis on audience targeting and audience insights, which are basic DMP use cases, over a third (37%) of respondents in APAC identify content and experience personalization as the primary use for their DMP (figure 7a), making it the region placing the most emphasis on personalization.

Mehrotra (APAC) supports the need to personalize the messaging to consumers: *“Using data to personalize ad messaging and content on your site as a brand or publisher is more important than ever. Each individual consumes content differently and has different preferences. All our campaigns have some form of personalized messaging being delivered, be it to the smallest degree where minimal data is present to a high degree where we have robust customer data available.”*

Furthermore, agencies in APAC are using DMPs to help feed data into the creative design process (27%: figure 7b). While this is recognized as an opportunity globally (20% listed it as the biggest opportunity), over a quarter (27%) of respondents in APAC see this as the a key use for DMPs — the highest proportion globally.

**Figure 7b: What is the biggest opportunity for agencies investing in DMP solutions: APAC**



Our findings reveal advanced DMP applications, despite the fact that APAC agencies adopted DMPs later than the US or EMEA. Regardless, figure 5b shows us that these use cases are proving successful. APAC agencies are implementing data strategy more intensively across all channels when compared to agencies in EMEA, and significantly more intensively than the US on search, email and OOH.

While improving online creative is the biggest opportunity in the region, Aloun Liu, Head of Data & Technology, APAC, Mindshare, also notes the importance of using these non-digital channels to reach the consumer wherever they are: *“As we get smarter in delivering messages to our audience, we will also need to get smarter about what message we are reaching them with — dependent on location, time of day, and interests.”*

*“Leveraging data at the intersection of media and content experiences means we can get to that future faster. Especially as more and more content creation becomes automated, we will be able to automatically activate niche target segments through dynamic creative optimization platforms and build dynamic landing pages depending where and when a person clicks through.”*

*“The applied scale of fully personalized campaigns is still very small in APAC. However as the technology to do this becomes more readily available, it has the potential to scale very fast.”*

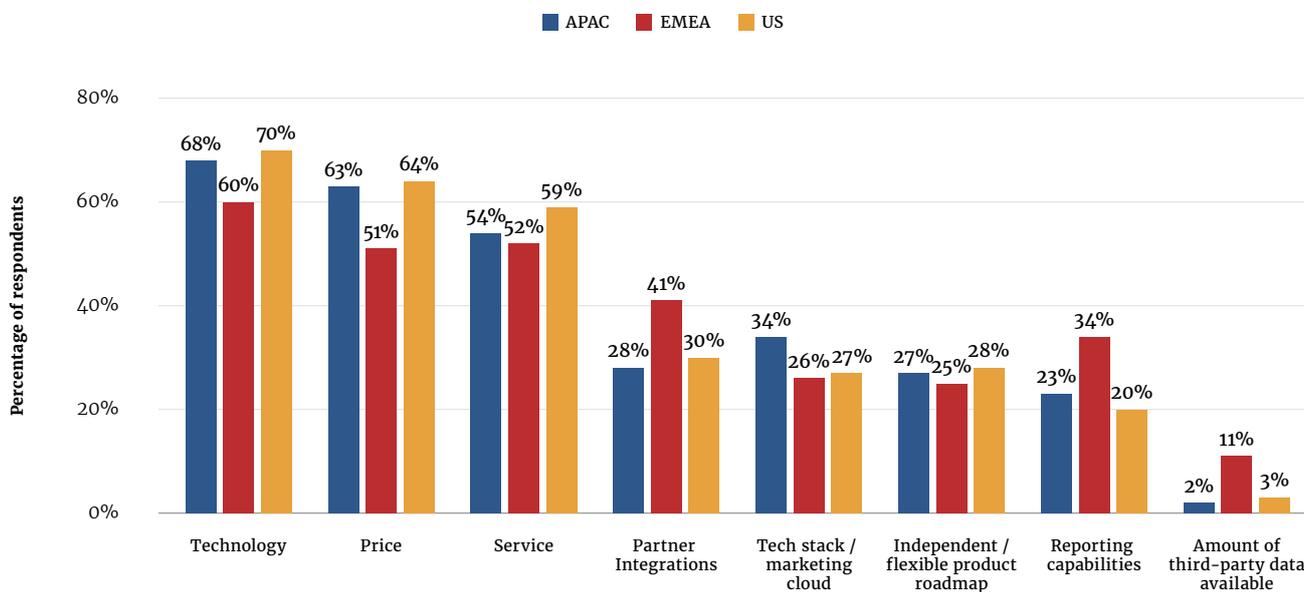
For a region where DMP adoption has been slower than in the other regions examined in this report, improving digital creative can be considered a surprisingly advanced use case. We hypothesize that this is due to the fact that agencies in APAC have learned from the mistakes, as well as the most effective use cases of the US and (to a lesser extent) EMEA, and are aiming to fully exploit the benefits of the DMP beyond just targeting ads.

### Driving DMP adoption and improving perception

Despite agencies beginning to drive advanced use cases for their DMPs globally, there is still work to be done to:

1. Gain adoption among the last 21% of agencies
2. Boost the number of global agencies who view DMPs as ‘vital’

**Figure 8: What is most important when selecting a DMP?**



When agencies are selecting a DMP, there are three major considerations: technology, price, and service (figure 8).

We have already pointed to price as an issue preventing some agencies from adopting a DMP (figure 3). Figure 8 shows that in addition, DMP providers must showcase the quality of their service and the abilities of their technology.

If DMP providers are to achieve higher adoption rates and improved product perception, they will have to focus on different factors in each of the DMP in each region.

**US:** As region with the most advanced use cases for their DMPs, agencies in the US are unwilling to compromise on technology and service. As agencies here have been working with DMPs for longer than in the other regions, they expect excellence in these two fields. Given the regional trends outlined earlier, DMP providers should seek to highlight the ability of the DMP to boost offline activation.

**EMEA:** Agencies in EMEA are potentially willing to pay more for the product than agencies in the other regions studied here. In return for this investment, they will expect strong partner integrations (41%) and reporting capabilities (34%). EMEA agencies also put a much greater emphasis on the amount of third party data available within the DMP they choose, compared to the other regions.

**APAC:** As a region which is was a slower adopter than EMEA or the US, APAC is now looking to match these markets in terms of ad tech development. Agencies here are therefore placing high importance on the DMP's ability to fit seamlessly into their tech stack (34%), while they are refusing to compromise on technology (68%) or price (64%).

Figure 8 makes it seem as though price can deter agencies from DMPs, and there can be conflicts between clients and agencies around who should carry the cost of technology. However, if DMP providers can showcase that in addition to good technology and service their products can meet regional demands, adoption and perceptions will continue to improve.

## SUMMARY AND CONCLUSIONS

### Demand for data strategies

In a bid to deliver more relevant campaigns, brands are pushing agencies harder to deliver data-driven strategies. This is shown by the fact that nearly two-thirds (65%) of agencies are using data strategy in more than a third of new business pitches.

Agencies are answering this call — 79% have adopted DMP technology in a bid to offer data strategy, as well as to keep up with competitors, the majority of whom also own a DMP.

### Differentiation for success

However, DMP adoption is no longer enough for agencies to achieve differentiation, with such a high percentage of competitors having very similar technology, and there is a clear gap between adoption and execution.

Our data supports these theories:

- A third (30%) of our 'vital' group are highlighting their ability to improve data strategy in over two-thirds of pitches. By comparison, only 20% of those who rank DMPs as 'nice to have' use data strategy to the same extent.
- Those who rate DMP as 'vital' are more data intensive on every channel, than their 'nice to have' compatriots.

### A regional divide

This report highlights the differences in advanced use cases for DMPs across each of the regions we studied:

**US:** Agencies in the US are the most advanced in their use of DMP. Our hypothesis is that this is due to the fact they adopted the technology earlier and mastered the basic use cases, they are now moving on to more advanced ones. For instance, US agencies have mastered data management using online data sources and are now expanding to other channels, with a particular focus on bringing offline data sources online. While the collection, analysis and activation of cookie data is now mainstream among US agencies, the more advanced players are combining those online data sources with other new high-quality data sources, in an effort to differentiate themselves.

**EMEA:** The fragmented nature of the EMEA market means that agencies here are looking to the DMP to combine data sources, and integrate data from different markets. Moving beyond the more basic use cases, however, agencies in EMEA have begun to realize the opportunity to improve their, and their clients', knowledge of audiences, through sharing the insights gleaned from the DMP. This will help them stand out to clients as brands seek more data driven strategies from their agencies.

**APAC:** Despite adopting DMP technology relatively late on, agencies in APAC have quickly learned from other regions who invested in the technology earlier. They are using this knowledge to quickly catch up with other regions when it comes to advanced use cases such as content and experience personalisation (37%) and feeding data into the creative design process (27%).

## Promoting advanced DMP adoption

It is clear that one of the main challenges facing DMPs is that too few agencies are harnessing the advanced use cases the technology is capable of, to implement data strategies across all channels. Our data shows that the main challenges when it comes to execution are a lack of DMP owner (23%) and the complexity of the technology (13%).

This suggests that agency-wide investment in teams which oversee the implementation of data strategy will help build a competitive advantage in an agency landscape where adoption is less of a differentiator than it once was.

If agencies can invest in staff who champion the DMP, they will be in a stronger position to make the most of more niche uses for the technology, such as activating offline campaigns and optimizing digital creative. This will boost the number of marketers viewing DMPs as vital, and help create the supply of data strategy demanded by agencies.

At present, though DMP adoption is very strong around the globe, there are a number of agencies who own a DMP, but are not making the most of its advanced capabilities. Having a DMP is now almost table stakes for data-driven marketing agencies to offer accurate targeting, data unification, and audience analytics and insights to their advertiser clients. The agencies who will rise to the top will be those offering clients advanced data strategies, such as content & experience personalization, cross-device attribution, sequential messaging, and creative & messaging optimization. If brands are to be able to continue to build out their data strategies, agencies must begin to leverage the DMP's more sophisticated use cases.

## ABOUT OUR CONTRIBUTORS



### **Wojciech Bednarz**

*Data & Insights Senior Strategy Manager, Greenlight Digital*

Wojciech has over six years of experience in digital marketing, four of which he has served at Greenlight. During his career at Greenlight, he's worked on various international clients such as RS Components and Nespresso alongside others.

In his current role, Wojciech is responsible for advancing Greenlight's Data Science & Audience Insights department, which involves managing the implementation of the DMP technology across the agency to deliver cutting edge audience insights, data-driven attribution models and advanced activation strategies through data analysis.



### **Elie Milan**

*Associate Director, Social Performance, Publicis Media*

With over 10 years' of experience in technology, consultancy and digital media, Elie joined Publicis Media in August 2012 to lead the group's newly established Social Performance unit. In September 2015, Elie established a native advertising unit (AOD Native) specialized in performance native ad buying, in partnership with regional and global suppliers. In May 2016, Elie joined Publicis Media's programmatic trade desk (AOD), tasked with ensuring best in class service to the group's partner portfolio and bringing further innovation to the group's precision media tech stack.



### **Aloun Liu**

*Head of Data & Technology, APAC, Mindshare*

Aloun Liu is key member of Mindshare's APAC FAST Hub (Future Adaptive Specialist Team), and he specializes in advising clients on DMPs, artificial intelligence, big data platforms, reporting automation and everything data & technology related. Aloun has broad experience across many sectors and experience setting up technology hubs in Asia.



### **Rohan Mehrotra**

*Head of Trading & Product, Sparcmedia*

Rohan Mehrotra is the Director of Trading and Product at Sparcmedia and is a programmatic pioneer and evangelist. Having 13 years' experience in business strategy he has led the strategy and media buying of many of Australia's most prolific brands and has seen their marketing results transform via integrating programmatic as a key part of their marketing operations.



**Michael Beach**

*CEO, Cross Screen Media*

Michael Beach is the Chief Executive Officer of Cross Screen Media, a media analytics and technology company focused on helping brands optimize their media buying across all screens.

Prior to Cross Screen Media, Michael co-founded Targeted Victory, which quickly grew to be the dominant digital agency for the Republican party with 800+ clients, USD\$240m+ in total revenue and 100+ employees. Michael is a thought leader in audience based advertising, appearing in such publications as PBS Frontline, Wall Street Journal and The New York Times.



**Feliks Malts**

*Vice President, Decision Sciences, 3Q Digital*

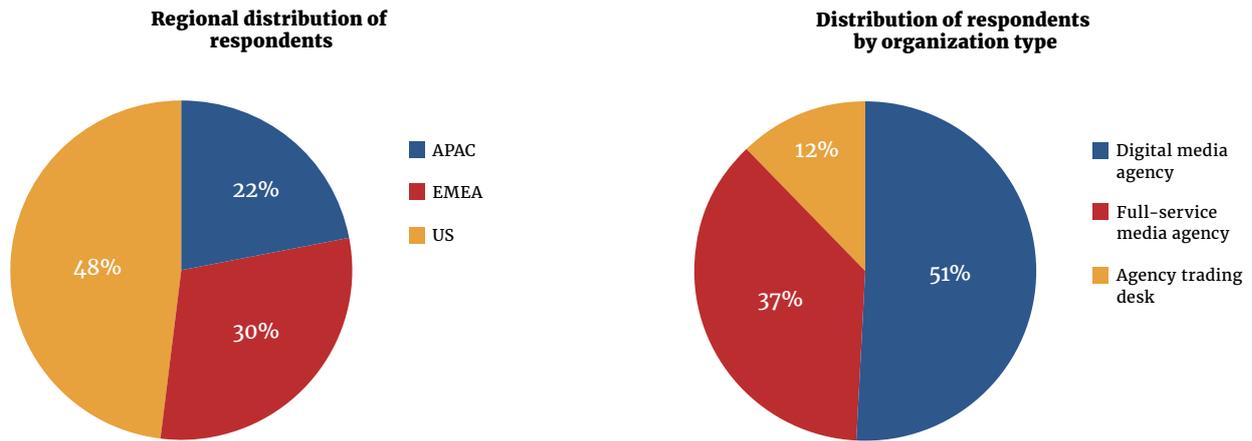
Feliks has well over a decade of analytics experience from client-side organizations (Scholastic, WebMD), agencies (R/GA, Organic, iCrossing), and vendors (Coremetrics). Prior to joining 3Q Digital, Feliks served as the Group Director of Analytics with R/GA, where he led commerce, personalization, audience development, tag management, and automation initiatives.

ExchangeWire and Lotame would like to thank all our thought leaders for their time and insight.

## SAMPLE AND METHODOLOGY

The report is based on a survey of 470 agency professionals across US, EMEA, and APAC. Data was collected during February 2017.

The following graphs show the breakout of our respondents by organization type and region:



ExchangeWire and Lotame would like to thank all those who took the time to complete the survey.

If you have any questions about this report, please contact Becca Muir, Head of Research at ExchangeWire via email at [becca@exchangewire.com](mailto:becca@exchangewire.com).

## ABOUT LOTAME

Lotame enables companies to use data to build stronger connections with their consumers. Lotame is proud to be the leading independent data management platform (DMP) and offer the most widely used, trusted and comprehensive data exchange in the industry. Committed to innovation, agility and — above all, customer success — the Lotame team aims to continuously find new and meaningful ways to help its clients harness the power of data to fuel more relevant and personalized experiences across screens and devices, online and off. Lotame is headquartered in New York City, with resources around the world, including Maryland, San Francisco, London, Singapore, Mumbai and Sydney.

## ABOUT EXCHANGEWIRE

ExchangeWire tracks global data-driven and programmatic advertising, media buying trends, and the ad tech and mar tech sectors. Delving deep into the business of automated media trading and the technology that underpins it across multi-channels (online display, video, mobile and social), the site aims to keep readers up to data on all the latest news and developments.

ExchangeWire provides opinion and analysis on the following sector companies: specialist media buyers, ad traders, ad networks, media agencies, publishers, data exchanges, ad exchanges and specialist ad tech providers in the video, mobile and online display markets.

Conceived by Ciaran O'Kane, CEO of ExchangeWire and Rachel Smith, COO of ExchangeWire, ExchangeWire Research is headed up by Rebecca Muir, Head of Research and Analysis. The unit uses its proprietary technology and unique industry data sets to offer global data and insight on the marketing technology, advertising technology and programmatic advertising sectors.

ExchangeWire provides global data and insight on Marketing Technology, Advertising Technology and Programmatic Advertising.

Delving deep into the business of martech, ad tech and programmatic advertising, ExchangeWire offers actionable market intelligence on emerging models and technology — as well as industry data and specific regional focus.