

Edition 2022

Data-Driven Marketing Research





Table of contents

Introduction and accountability	03
Management Summary	05
Results	08
Research method	22

Introduction

The Data-Driven Marketing Survey (DDMO) is an initiative of the industry association DDMA and the DDMA Committee for Data, Decisions & Engagement (DDE) and has been conducted annually since 2016. This seventh edition of the study maps out to what extent the data-driven marketing sector in the Netherlands possesses the technology to focus on (customer) needs through the use of data, and how budgets, the utilisation of channels, and the biggest marketing challenges are dealt with. Based on these innovative insights, the committee helps DDMA members to set up optimal data and technology infrastructure, and improve customer contact.

Research accountability

Method

Quantitative research, conducted by means of an online survey

Research agency

Carried out in collaboration with research agency GfK

Target group and random sample

n=420 Dutch people working within the marketing sector, selected on the basis of the question "Are the activities you perform within your current position mostly marketing-related?". In addition, 72 respondents of DDMA members participated. The results mentioned are solely based on the study target group (n=420), except when explicitly stated otherwise.

Significance clarification

In the case of differences in results between 2 different groups, the significance was tested with a reliability of 95%. In the event of there being a significant difference, this is indicated by a *. In some cases, indicatively significant differences have been mentioned, where significance has been demonstrated with a reliability of 90%. This is explicitly mentioned in these areas.

Management summary



Many opportunities exist for data-driven marketing: only 2 in 5 organisations base their practices on marketing on data & insights

The majority of Dutch organisations (62%) have stated that they genuinely put the customer first, and act accordingly. This was revealed in the 2022 Data-Driven Marketing Survey (DDMO) of the industry association DDMA, for which 420 Dutch people working in the marketing sector were interviewed in collaboration with research agency GfK. In terms of the utilisation of data, however, there are still many opportunities. For example, only 44% focus on KPIs to optimize the customer experience, and only 1 in 5 organisations are able to fully personalise one-on-one across different channels.

Doubts surrounding data impact within small organisations

About 1 in 5 organisations are still searching within the appropriate application and accessibility of data, and the use of marketing technology. This section uses data solely in a limited extent for customer insight purposes. A total of 15% of organisations do not apply data and insights (with 42% being neutral and 5% don't know) and also doubt their impact – 11% say they see no added value in data-driven working (and 5% don't know). These are usually smaller organisations (25 employees). Organisations that do see the added value of data often already have the data and technology to take steps. This mainly concerns organisations with more than 25 employees. For example, marketing teams from these larger organisations use data and insights more often (47%) than smaller organisations (24%).

An important explanation for this lies in the availability of data. The smaller the organisation, the fewer marketing technology or platforms are used (e.g. 65% compared to 92% of organisations with more than 10 employees). Small companies (<25 employees) are also less dependent on data; they are less likely to focus on customer KPIs (33%) compared to large organisations (53%). Furthermore, they are less likely to have full insight into what marketing expenses generate (24% compared to 34%). Challenges for them are mainly in the preconditions of data-driven operations, such as the availability and accessibility of data. In addition, budget (39%) and data quality (24%) also pose challenges for small organisations.

Large organisations face mainly organisational challenges

For larger companies (>25 employees), data-driven working is more often crucial to show the added value of their product, service or service (52% compared to 37% for smaller organisations). In addition to data quality (33%), their challenges lie mainly in organisational aspects, such as creating a data-driven culture (26%), finding and retaining the right experts (26%), and collaboration between departments (25%).

Opportunities for collaboration between data and business teams

One striking aspect, is that there is still a lot to be gained in terms of cooperation between the 'business side' and 'data side' within organisations. Employees who deal with data and insights, such as data analysts and developers, experience less close collaboration than people on the business side, such as marketers, product owners and managers. The two groups also assess their organisation's data maturity differently. For example, the data teams are more likely to believe that data and insights are available and easily locatable, while this applies to a lesser extent to the business teams (75% compared to 54%). Also, 53% of data experts know that you can distinguish yourself as an organisation by successfully applying data, compared to 31% of business experts.

Added value of personalised customer contact acknowledged and increasingly implemented

On average, organisations use four marketing channels, with e-mail, their own website, social media and direct mail representing the most popular channels. Personalisation of communication is mainly done for the channels e-mail, direct mail, messaging, inbound telephony and chatbot. In terms of personalisation, more than half (57%) say they are able to personalise the customer experience partly one-on-one and/or partly at the segment level. A total of 18% state that they can seamlessly and completely personalise the customer experience one-on-one across different channels. Moreover, 2 out of 3 organisations (63%) really see the added value of personalised customer contact.

Results

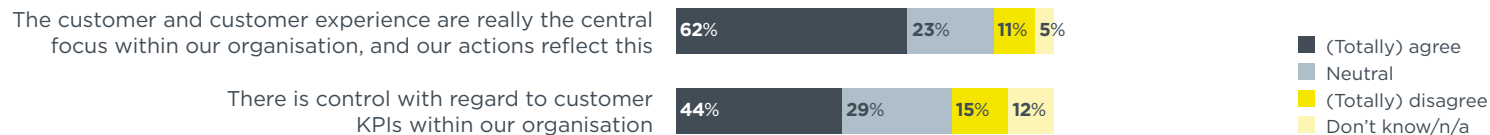


Customer is central, but management and optimisation based on data is still lagging

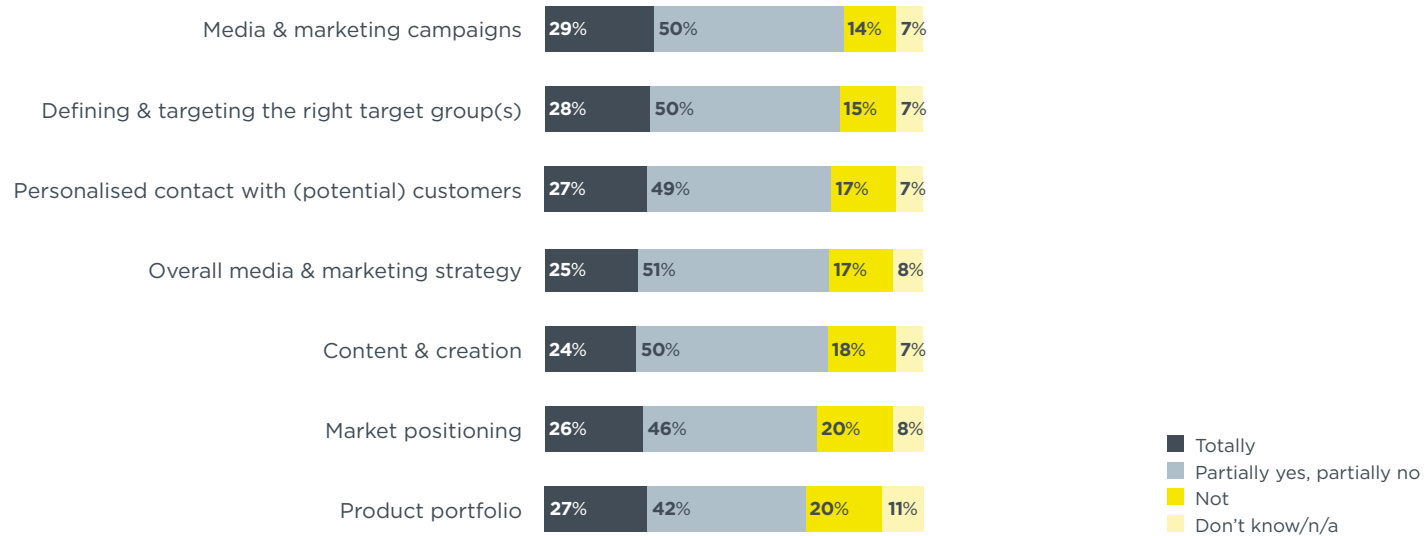
The majority (62%) of organisations state that they really put the customer first and act accordingly. However, this is not entirely true; for example, only 44% focus on KPIs to optimize the customer experience. Moreover, only 1 in 4 organisations optimise marketing activities entirely based on data and insights. This is generally done in a predominantly partial manner, so there are still opportunities for organisations in this regard.

View all figures about customers, customer experience and optimization

Question: To what extent do you agree with the following statements about customers and the customer experience?



Question: To what extent are the following marketing activities within your organisation determined and optimised based on data & insights?

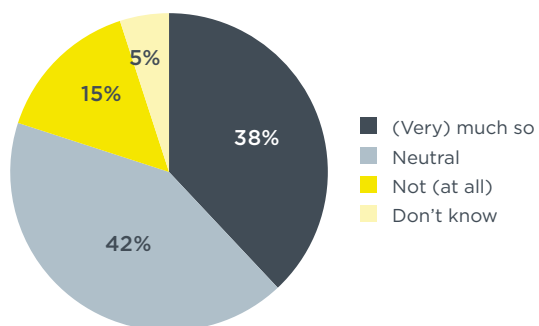


Availability and accessibility of data is essential

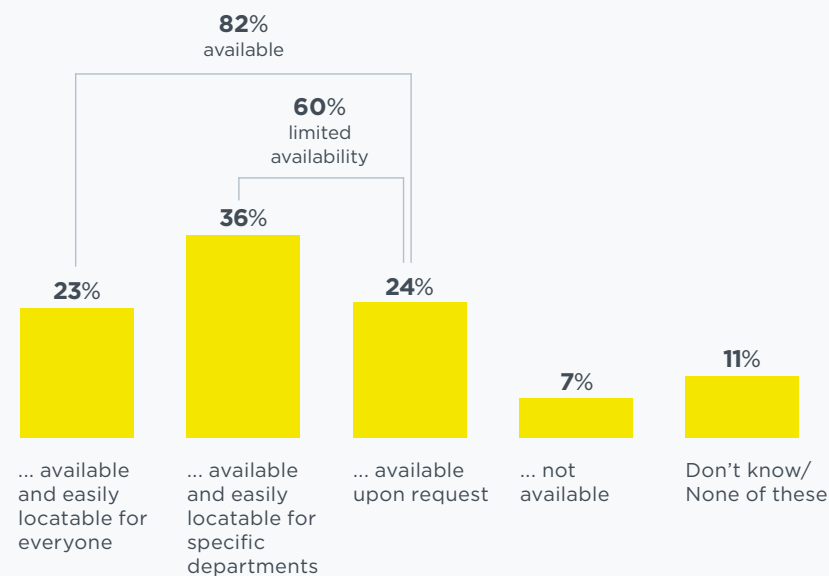
The management and optimisation of marketing activities is therefore lagging. In addition, only 38% of organisations use data and insights by teams involved in marketing-related activities.

There is an explanation for this, as the availability and accessibility of data play an important role in this regard. A total of 82% of organisations state that data and insights are easily available, but this doesn't necessarily ensure that marketing activities are carried out on the basis of data, with data and insights genuinely easily locatable for everyone in just 1 in 4 (23%) organisations. In many organisations, data is specifically only easy to find for certain departments, which can cause the use of data for marketing activities to be hindered.

Question: To what extent are data and insights applied within your organisation by teams engaged in marketing-related activities?



Data & insights are...

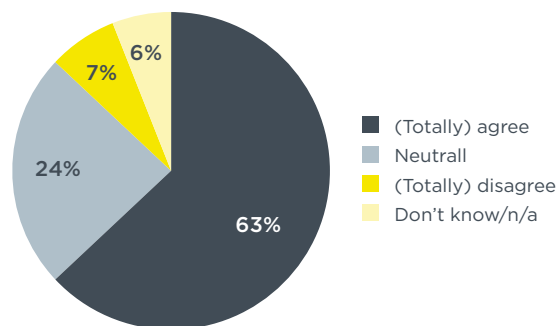


On average, organisations use 4 marketing channels for customer contact

Larger organisations (with 25+ employees) use slightly more marketing channels on average for customer contact, namely a total of five, while smaller organisations implement an average of three. E-mail, their own website, social media and direct mail are among the most popular channels.

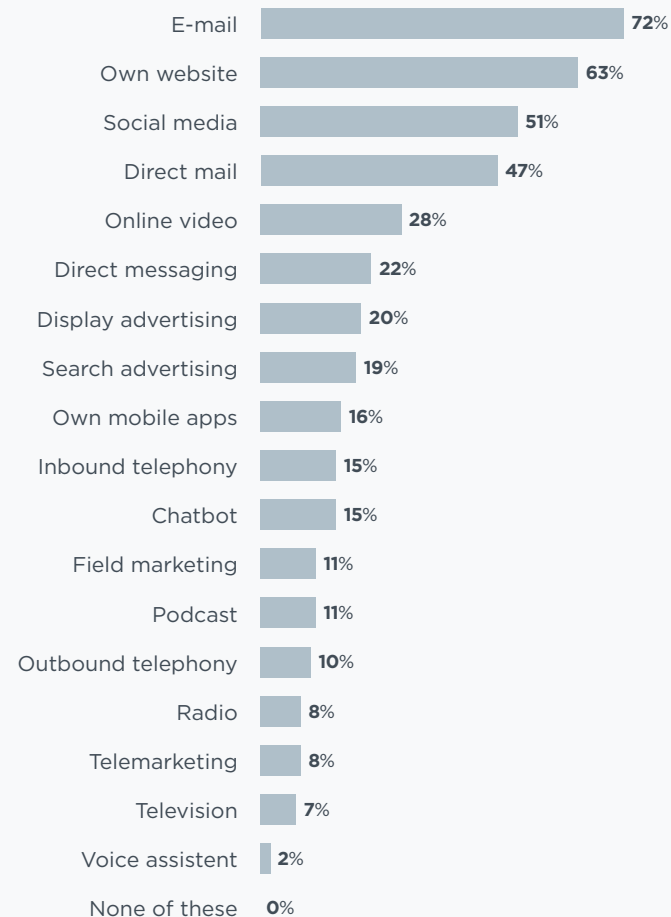
The added value of personalised customer contact is acknowledged by 2 in 3 (63%) organisations.

Position: Personalised customer contact has proven its added value within our organisation



Question: Which channels does your organisation use for contact with (potential) customers?

Selection: is familiar with the use of media and marketing channels (n=377)



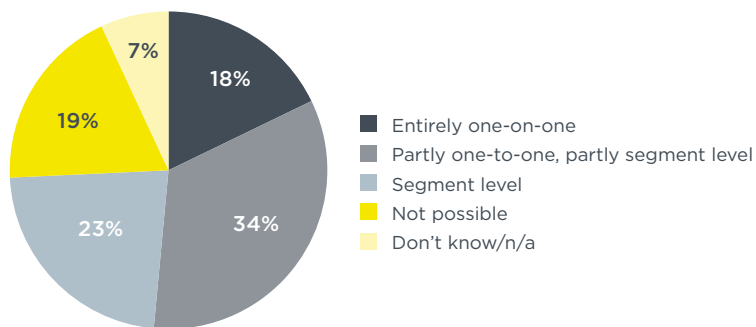
Personalisation is increasingly being implemented

Organisations personalise communication particularly for the following marketing channels: e-mail, direct mail and messaging, inbound telephony, chatbots, and their own mobile apps. In general, one third of these channels are partially personalised, and more than half of the marketing channels mentioned are fully personalised.

In terms of personalisation, more than half (57%) say they are able to personalise the customer experience partly one-on-one and/or partly at segment level. Only 1 in 5 organisations (18%) say they are able to fully personalise one-on-one across different channels.

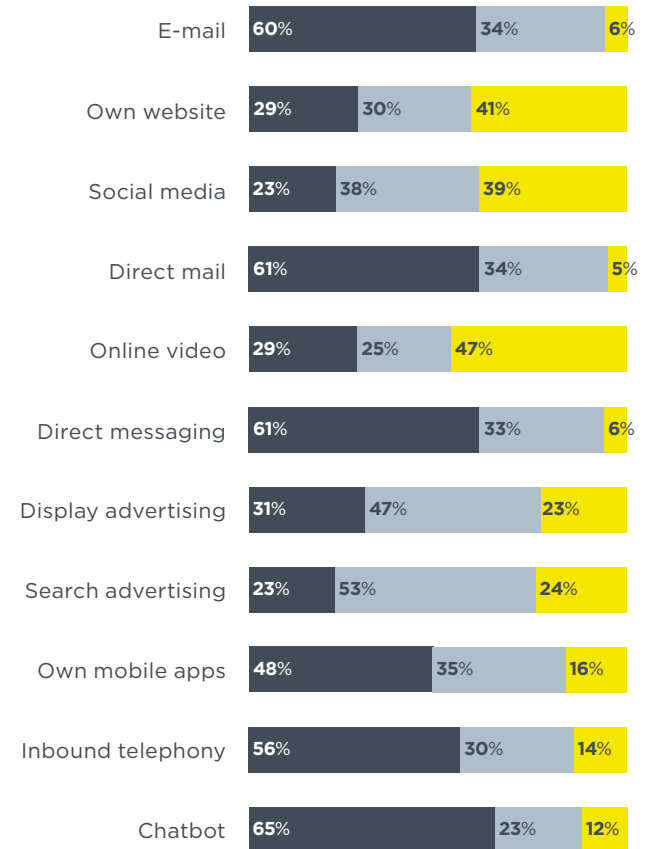
Question: Is your organisation able to offer a seamless, personalised cross-channel customer experience?

Selection: familiar with the technology used (n=360)



Question: Is communication personalised through these channels?

Selection: uses the relevant channel for contact with (potential) customers (minimum n=50)



Fully personalised
 Partially personalised
 Not personalised

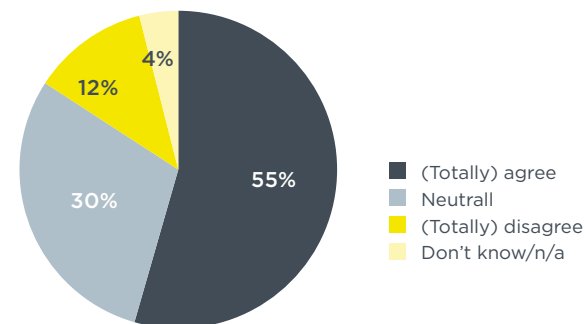
Organisation size influences data maturity

Looking at the design of organisations, about 1 in 5 are still looking for the right application and accessibility of data, and the use of marketing technology - only using data to a limited extent to gain insight into their customers - 15% of organisations do not apply data and insights (42% are neutral and 5% don't know). Also, 12% do not make decisions based on data (4% don't know) and are doubtful about whether data-driven working even has an impact - 16% (of which 5% don't know) say they see no added value. These are more often smaller organisations with <25 employees. At the same time, we see that organisations that do have in-house data and technology, especially larger organisations (25+ employees), are taking steps in the field of data.

As stated earlier, the availability and accessibility of data and insights is decisive here. Marketing teams from larger organisations (25+ employees) use data and insights more often than smaller organisations - 47% (very) much compared to 24% of smaller organisations. As mentioned, this has to do with a higher degree of availability. For example, 91% of this group states that data and insights are available within their organisation, compared to 70% of smaller organisations.

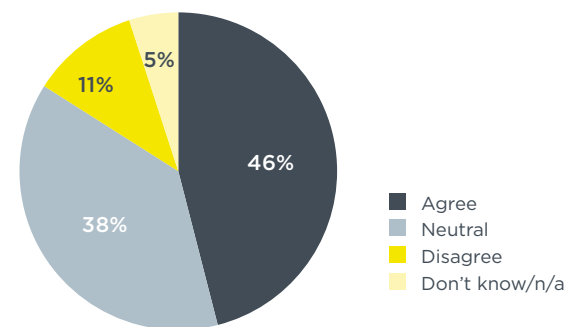
Position: Our organisation makes decisions using suitable quality data

Selection: familiar with the technology used (n=360)

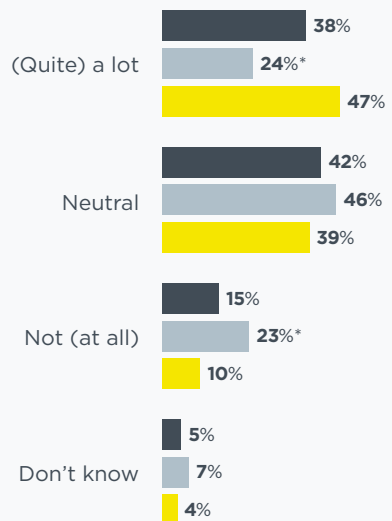


Position: Data-driven working is crucial for demonstrating the added value of our product, service or service to customers

Selection: familiar with the technology used (n=360)



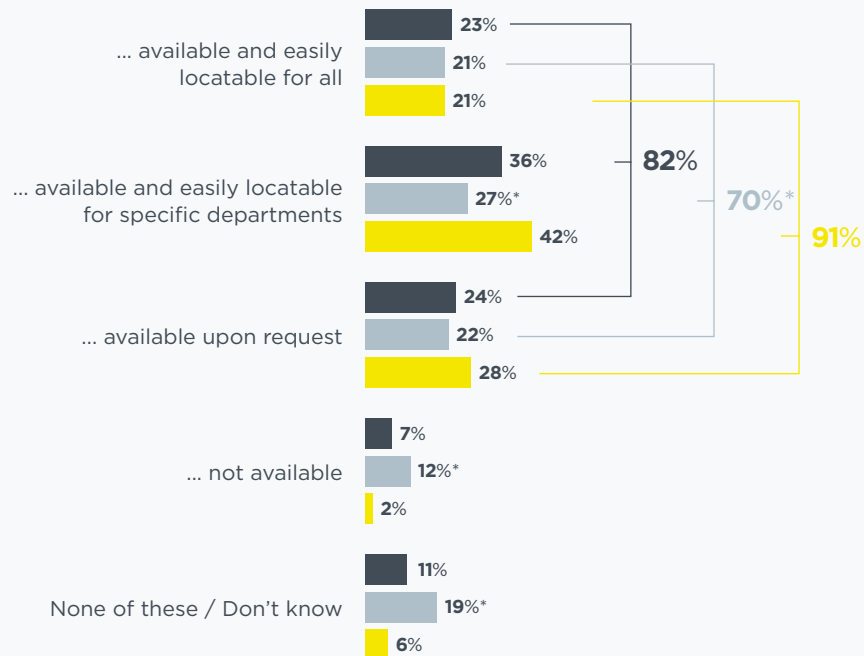
Question: To what extent are data and insights applied within your organisation by teams engaged in marketing-related activities?



- organisations (n=420)
- organisations with <25 employees (n=185)
- organisations with 25+ employees (n=235)

* = significant difference between organisations with <25 and 25+ employees

Data and insights are...



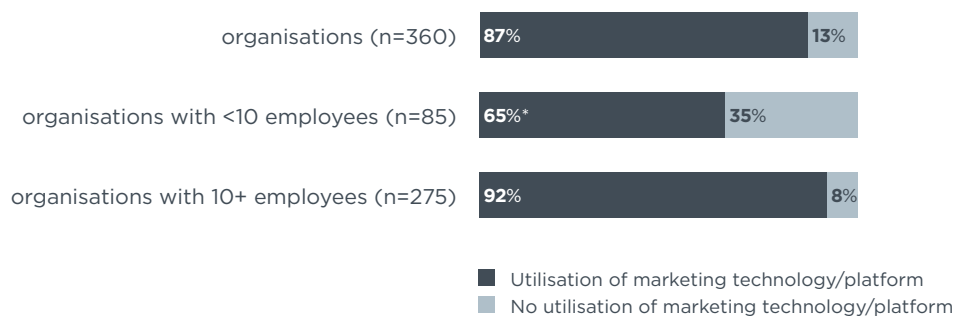
Use of marketing technologies and/or platforms within organisations

Smaller organisations (<10 employees) are less likely to use marketing technology or platforms – 65% utilise these compared to 92% of organisations with more than 10 employees. This is noteworthy, as there are enough relevant tools on the market that are applicable for them.

One factor that is applicable for all organisations, is that when they use a marketing technology and/or platform, this usually involves a CRM system, Data Warehouse and/or Data Management Platform (DMP). Larger organisations are also more likely to implement a BI/Reporting platform, while smaller organisations are more likely to opt for a Customer Data Platform (CDP) instead.

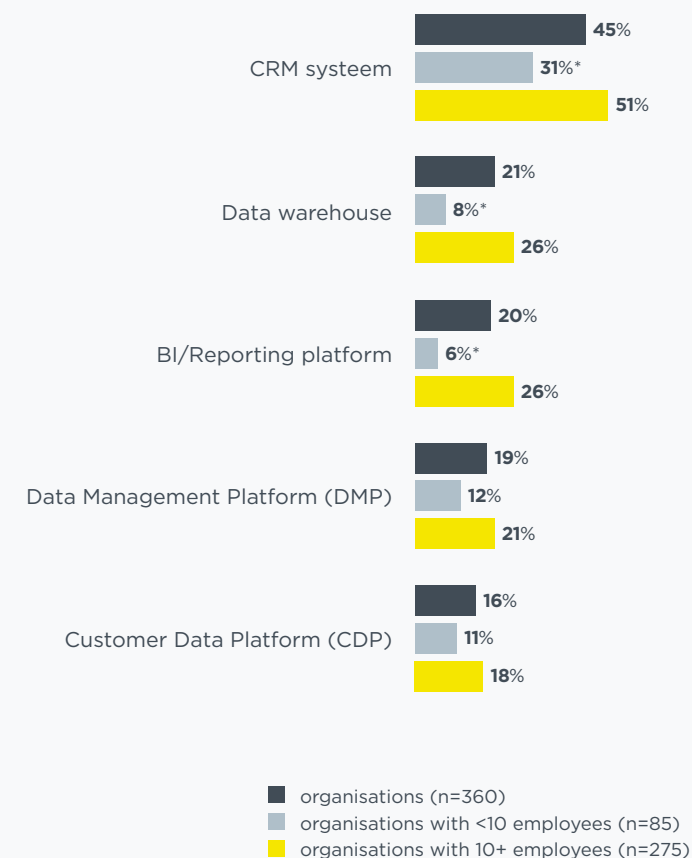
Use of marketing technologies/platforms within the organisation

Selection: familiar with the technology used (n=360)



Which technologies or platforms does your organisation use?

Selection: familiar with the technology used (n=360)



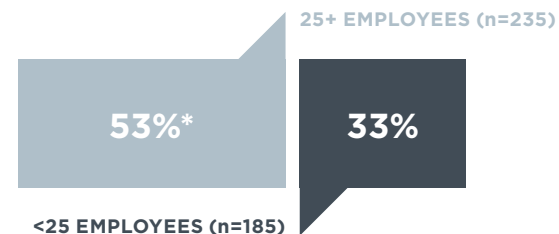
* = significant difference between organisations with <10 and 10+ employees

Data maturity determines the estimated value of data-driven working

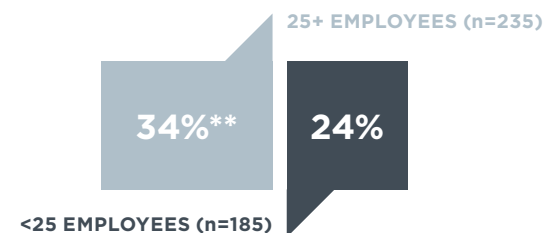
Smaller organisations (<25 employees) are less dependent on data: they are less likely to focus on customer KPIs (33% compared to 53% of large organisations), and less often have full insight into what marketing expenditure generates (24% compared to 34% for large organisations). Challenges for them are really still in the preconditions of data-driven working: in addition to the aforementioned availability, budget (39%), data quality (24%), and finding time and space to innovate (23%) are also important challenges for small organisations.

For larger organisations (with 25+ employees), data-driven working is more often especially important to demonstrate the added value of their product, service or service (52% compared to 37% for smaller organisations). In addition to data quality (33%), their challenges lie mainly in organisational aspects: creating a data-driven culture (26%), finding and retaining the right experts (26%), and collaboration between departments (25%).

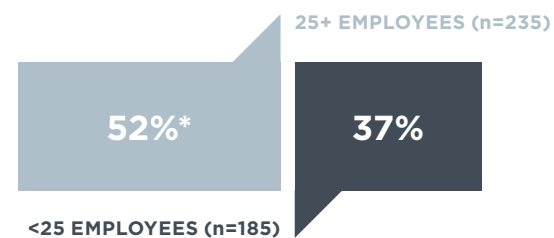
Focus on customer KPIs within the organisation



Insight into what marketing expenditure is generating



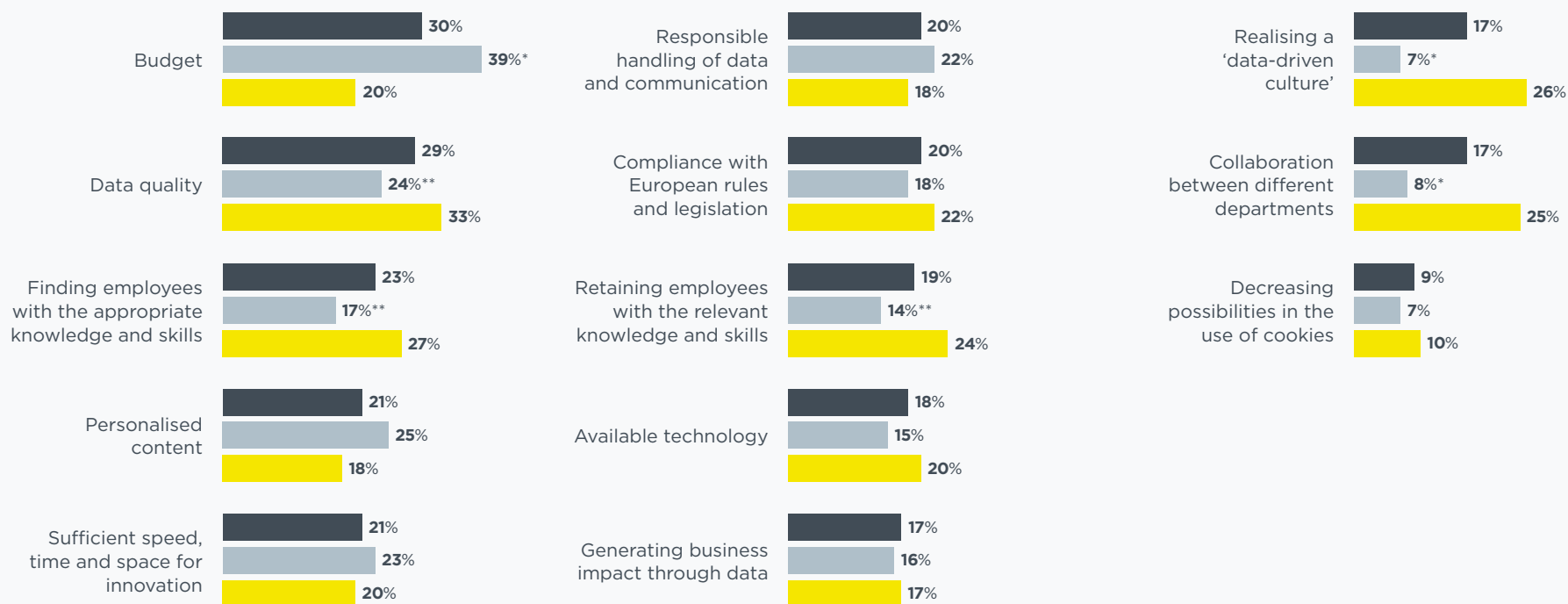
Data-driven working is crucial to show the added value of a product or service



* = significant difference between organisations with <25 and 25+ employees

** = indicative significant difference (90%) between organisations with <25 and 25+ employees

Question: What are the biggest challenges within your organisation when in terms of data-driven marketing?



■ organisations (n=420)

■ organisations with <25 employees (n=185)

■ organisations with 25+ employees (n=235)

* = significant difference between organisations with <25 and 25+ employees

** = indicative significant difference (90%) between organisations with <25 and 25+ em-

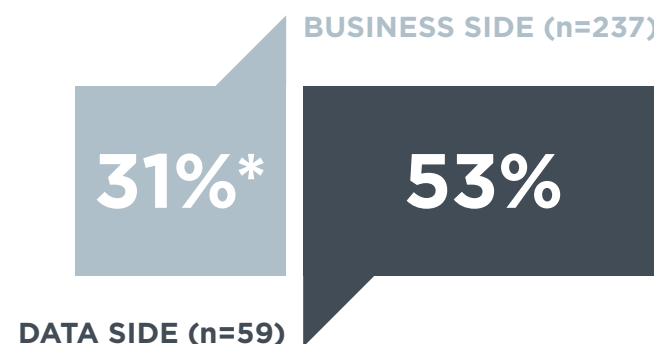
Opportunities for collaboration between data and business teams

We previously mentioned that there is a challenge among larger organisations (with 25+ employees) for improving joint efforts between different departments. The figures show that there are mainly opportunities for cooperation between the 'business side' and the 'data side' of organisations.

Employees who deal with the 'business side' of organisations, such as marketers, product owners, managers, have little insight into the 'data side', in which data analysts and developers are active. From both perspectives, it is not possible to properly assess what the other side is doing, and what their insights are. This is the case for example in the dynamics between employees in the field of data, and analytics and employees in the field of content and creation.

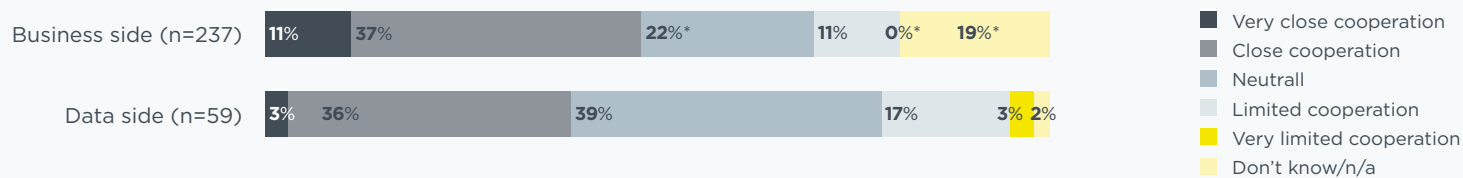
In terms of content, they are not fully aware what other parties are doing, and miscalculate what information is held by other departments; there are still real opportunities in that regard. For example, data teams are more likely to believe that data and insights are available and easy to find for everyone within the organisation, while this does not seem to be the case for business teams (75% compared to 54%). This also leads to data teams being more convinced that their organisation is distinctive in successfully applying data, while the business side is much less familiar with this (31% compared to 53% for the data side).

Organisation is at the forefront of the successful application of data

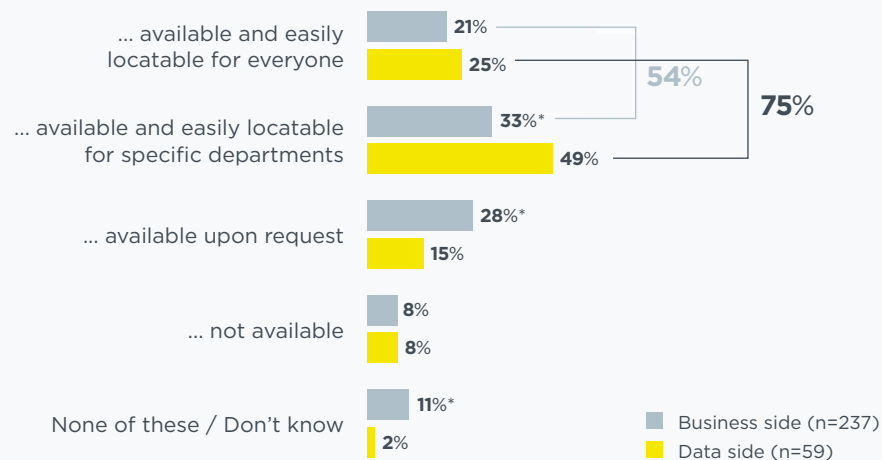


* = significant difference between the business side and data side of organisations

Question: What are the biggest challenges within your organisation when it comes to data-driven marketing?



Data and insights are...



* = significant difference between the business side and data side of organisations

DDMA members are at the forefront of data-driven working

ZAs stated in the introduction, the questions from the research have also been submitted to DDMA members. The results show that DDMA members work in a significantly more data-driven manner than the representation of the marketing sector – 92% for DDMA members and 64% for sector representation.

DDMA members are more likely to make decisions using data (69% versus 55%), and data and insights are more often used by marketing teams (63% versus 38%). In addition, they focus more on customer KPIs within the organisation – 65% compared to 44% of the sector representation.

Finally, DDMA members are at the forefront of the market when it comes to agile working – 81% work according to agile principles to a greater or lesser extent, compared to the 62% of organisations in the sector representation. This makes DDMA’s members much more agile than average, enabling them to swiftly deal with changes and innovations.

To what extent do you use data (or insights from data) within your current position?



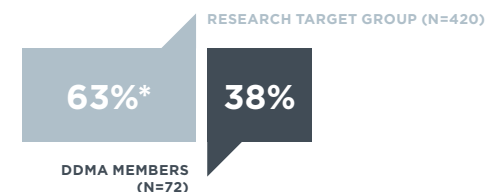
- Research target group (n=420)
- DDMA members (n=72)

* = significant difference between the research target group and DDMA members
 ** = indicative significant difference (90%) between the research target group and DDMA members

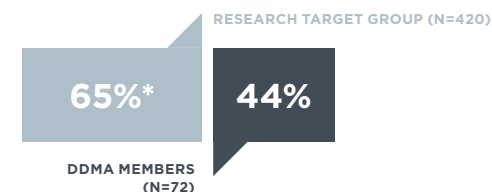
Making decisions based on data utilisation



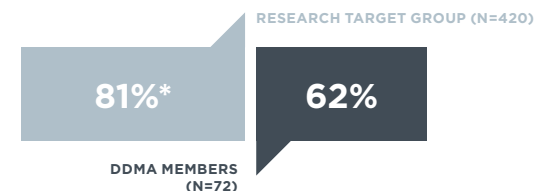
Application of data and insights by marketing teams



Control of customer KPIs within the organisation



Working according to agile principles within the organisation



About the study

Background characteristics of respondents surveyed

Percentages shown are the research target group (n=420), the percentages of DDMA members are in italics (n=72)

Methodology



Method

Quantitative research, conducted by means of an online survey



Total number of respondents

n=420 Dutch people working within the marketing sector, n=72 DDMA members



Omvang: 27 questions



Veldwerkperiode: june-July 2022

Organisational characteristics

Working within B2B/B2C	B2B – e.g. at an agency / consultancy / freelancer (supplier) / vendor / supplier	40% <i>31%</i>
	B2C – e.g. for an advertiser / client / brand / NGO	32% <i>36%</i>
	Both, both B2B and B2C	28% <i>33%</i>

Branche			Scale of the organisation		
Business services sector	46% <i>36%</i>	Scale of the organisation	1 employee	13% <i>7%</i>	
Charities	- <i>11%</i>		2-10 employees	15% <i>8%</i>	
Banking & Insurance	3% <i>10%</i>		11-25 employees	16% <i>8%</i>	
Media & Publishing	- <i>8%</i>		26-100 employees	25% <i>22%</i>	
Retail (mixed)	3% <i>7%</i>		101-500 employees	19% <i>22%</i>	
Culture & Entertainment	9% <i>6%</i>		500+ employees	11% <i>32%</i>	
Fast-Moving Consumer Goods	4% <i>4%</i>				
Energy & Utilities	3% <i>3%</i>				
Foundations & Associations	- <i>3%</i>				
Healthcare & Welfare	4% <i>3%</i>				
Other industry	- <i>3%</i>				
Construction & Real Estate	7% -				
Wholesale	3% -				
Selection	> 2%				

Personal characteristics

Profession	Business (e.g. marketer, product owner, manager, coordinator)	56% <i>60%</i>
	Byte (e.g. analyst, developer, programmer, data scientist, data engineer)	14% <i>8%</i>
	Both, both business and byte	22% <i>25%</i>
	None of these	8% <i>7%</i>

Responsibility for marketing tooling and budgeting decisions

Fully responsible	44% <i>25%</i>
Partly responsible	46% <i>60%</i>
Not responsible	9% <i>15%</i>

Degree of data utilisation within job position

Quite a lot	18% <i>47%</i>
A lot	46% <i>44%</i>
Neutral	30% <i>7%</i>
None (at all)	6% <i>1%</i>

Colofon

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Final editing

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About DDMA

DDMA is the largest industry association for data-driven marketing, sales and service. We are a network of advertisers, non-profits, publishers, agencies and tech suppliers, who use data in an innovative and responsible way to interact with consumers. Through knowledge and advice, we help our members to work in a data-driven and customer-oriented manner, and to develop a vision with regard to data use and dealing with amendments to legislation. We also give our members a voice in The Hague and Brussels, and professionalise the sector through fostering self-regulation.

For all DDMA studies, please visit: ddma.nl/kennisbank