

# 2018 PERCEPTIONS OF DATA MANAGEMENT PLATFORMS

PRICING TRANSPARENCY, TECHNOLOGY, ANALYTICS, CLIENT EXPERIENCE AND SERVICE ARE KEY TO WINNING BUSINESS



DMPs are no longer simple data warehouses. Today, the challenges for buyers and sellers concerning integrating, centralizing, segmenting, analyzing and optimizing data – in real time and enabling precise targeting – can be overwhelming. To succeed, the DMP companies in this competitive space must understand what’s critical to advertisers, and how they can better deliver results and satisfaction.

In our 1H 2018 DMP Report (one component of our larger Programmatic Intelligence Report), we interviewed 345 decision makers – marketers and agency professionals – on what a good DMP looks like. More specifically, we wanted to understand:

- What Do Agencies and Marketers Want from A DMP?
- Who Do They Turn to and Why?

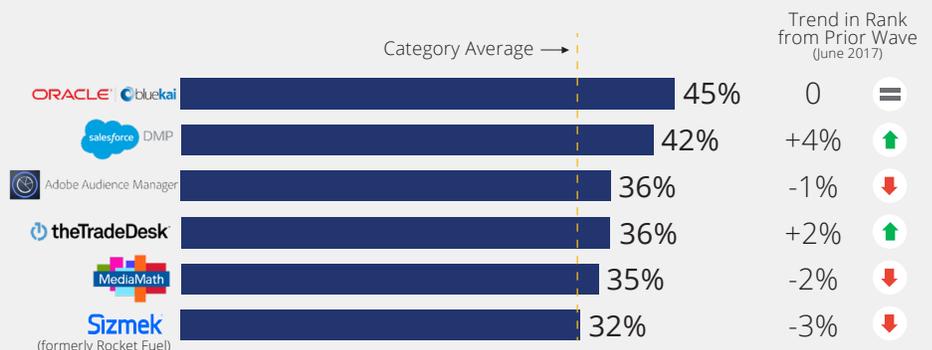
## DMPs THAT ARE CONSIDERED LEADERS

Until Salesforce acquired Krux in October 2016, Oracle/BlueKai had a sizeable lead in usage, consideration and intention among advertisers in our studies. That has changed. While Oracle leads across all consideration metrics (familiarity, consideration, intention), Salesforce DMP has narrowed the gap. Following closely are DMPs that play across other ad tech stack categories – The Trade Desk, MediaMath, and Adobe Audience Manager – performing well in advertiser consideration.

Moving from consideration to purchase intent, reveals a similar ranking of DMPs. Oracle continues to lead with Salesforce close behind. Trends show the biggest mover is MediaMath, up six points wave-over-wave. This stands out, as six of the ten DSPs shown here were flat to down in purchase intention from the prior wave of our study.

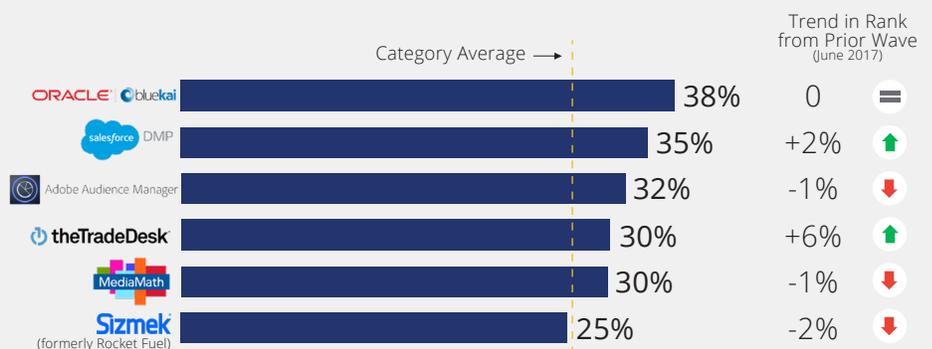
## CONSIDERATION OF DATA MANAGEMENT PLATFORMS

Percent of Respondents Rating 8-10 on a 10-Point Scale (Among Top 10 Used)



## PURCHASE INTENTION OF DATA MANAGEMENT PLATFORMS

Percent of Respondents Rating 8-10 on a 10-Point Scale (Among Top 10 Used)



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In an effort to identify a clear leader, respondents were asked to select a single DMP with which they intended to use. This choice exposed a competitive and fragmented market in which Oracle's dominance is declining as competing DSPs capture larger shares of advertiser intentions.

## PREFERENCE OF DATA MANAGEMENT PLATFORMS

Percent of Respondents

	JAN. 2018	OCT. 2016
ORACLE bluekai	23%	31%
salesforce DMP	14%	3%
theTradeDesk	11%	3%
Adobe Audience Manager	11%	11%
exelate <small>A Nielsen Company</small>	7%	4%
MediaMath	7%	12%

## WHAT ADVERTISERS WANT FROM A DMP

Marketer and agency decision makers rated DMPs on 24 selection criteria – across data, technology, user experience, analytics and sales relationships. While all 24 are important to some degree, we used statistical analysis to determine those criteria of greatest importance in driving advertiser usage of a DMP.

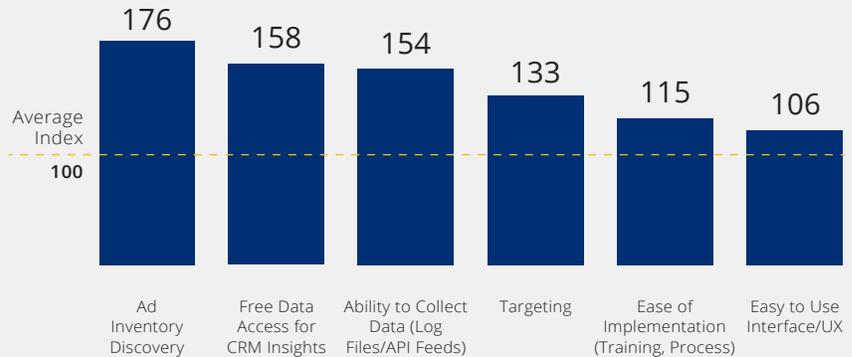
For technology, our analysis revealed six critical criteria that determine DMP use: ad inventory discovery, free data access for CRM insights, ability to collect data, targeting, ease of implementation and ease of use.

We also tested several analytics criteria to see what matters most. Quality of campaign insights was the most critical factor for DMP selection.

Relationships also matter. Sales and service support can be important differentiators when agencies and marketers make DMP decisions. Among the six related criteria we tested, responsiveness to client needs both during and after implementation, as well as technology expertise rose to the top.

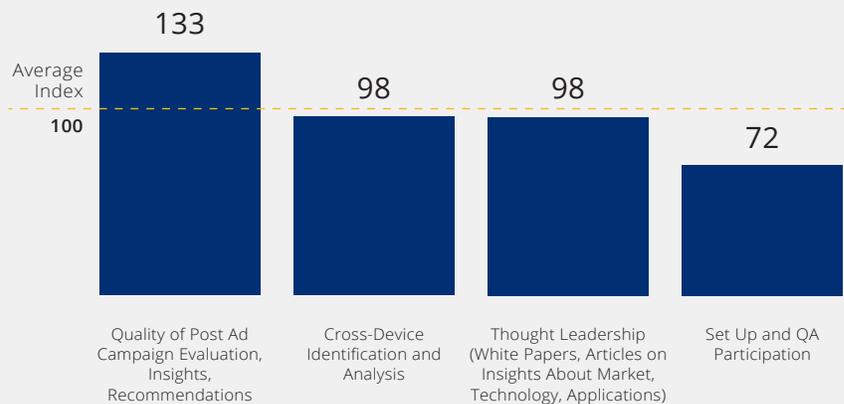
## TECH CRITERIA THAT DRIVE DMP SELECTION

Index of "Key Drivers" Regression to Likely to Use



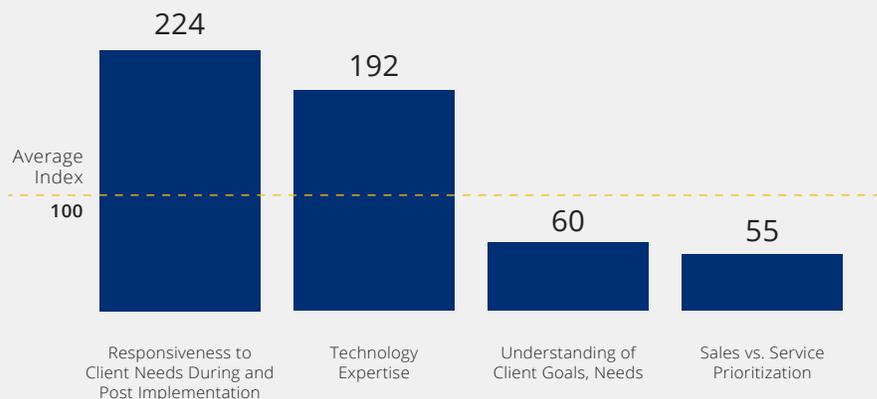
## DMP ANALYTICS CRITERIA THAT MATTER MOST

Index of "Key Drivers" Regression to Likely to Use



## DMP / CLIENT INTERACTION CRITERIA THAT MATTER MOST

Index of "Key Drivers" Regression to Likely to Use



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## WHAT MAKES A DMP A PREFERRED PARTNER

In such a competitive environment, how can DMPs separate themselves? What can a DMP offer its clients for it to be considered a “preferred” partner? Much of the feedback revolved around data and technology, the user experience and service. Here’s what advertisers had to say about some of the leading DMPs:

“They have a great team of brand marketers who are effective and their video buying efficiencies provide opportunities to scale across every screen”  
- AGENCY DIRECTOR



“...More nimble than others and bring additional opportunities to the table”  
- AGENCY SUPERVISOR



“Their platform is easier to use than others... they are more technologically advanced than some of their competitors.”  
- AGENCY DIRECTOR



“They help build unique audience profiles so you can identify the most valuable segments and use them across any digital channel.”  
- AGENCY SUPERVISOR



“They are the best at marketing your campaign to what people are watching and most interested in”  
- MARKETING VP



“They take a less main stream approach and they use AI to help focus on our target audience and their support is very good.”  
- MARKETING EXECUTIVE



### METHODOLOGY AND RESPONDENT PROFILES

- 345 Online Interviews Conducted
- Sample: Marketer and Agency contacts from The Advertiser Perceptions Media Decision Maker Database and third-party databases as needed
- Main Qualification: Involved in the purchase of programmatic advertising; used or worked with DMPs in the past year
- Field Period: January 2018



### WHAT ADVERTISERS THINK®

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