Australian Government

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Australian Communications and Media Authority

researchacma
Evidence that informs

Data-driven marketing practices
Australian industry participants survey results

DECEMBER 2016

communicating
facilitating
regulating

Canberra
Red Building
Benjamin Offices
Chan Street
Belconnen ACT

PO Box 78
Belconnen ACT 2616

T +61 2 6219 5555
F +61 2 6219 5353

Melbourne
Level 32
Melbourne Central Tower
360 Elizabeth Street
Melbourne VIC

PO Box 13112
Law Courts
Melbourne VIC 8010

T +61 3 9963 6800
F +61 3 9963 6899

Sydney
Level 5
The Bay Centre
65 Pirrama Road
Pyrmont NSW

PO Box Q500
Queen Victoria Building
NSW 1230

T +61 2 9334 7700 or 1800 226 667
F +61 2 9334 7799

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Written enquiries may be sent to:

Manager, Editorial and Design
PO Box 13112
Law Courts
Melbourne VIC 8010
Tel: 03 9963 6968
Email: candinfo@acma.gov.au

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Overview

Background

The Australian Communications and Media Authority (the ACMA) is responsible for oversight of the *Do Not Call Register Act 2006*, the Telemarketing and Research Industry Standard 2007, the Fax Marketing Industry Standard 2011 and the *Spam Act 2003*, which set out the rules for unsolicited communications—telemarketing calls, fax marketing calls and commercial electronic messages (spam).

Data-driven marketing and advertising includes any marketing communication that uses insights from data, including personal information to determine:

> who to target
> when to engage
> what to include in the offer.[1]

Direct marketing involves the business of selling products directly to the public, for example, by mail order or by telephone selling, rather than through retailers.

Knowledge of how spam, telemarketing and fax marketing are used, and how they differ from broader data-driven marketing practices when marketing to Australian consumers, provides intelligence and contextual information for policy and decision makers.

About this research

In the first half of 2016, the ACMA commissioned the Association for Data-driven Marketing and Advertising (ADMA) to conduct a survey among its members to better understand current data-driven marketing practices and trends.

The research needs identified included:

> an analysis of data-driven marketing activity in Australia, including where possible information about the size and structure of the market
> explanations of the marketing methods and channels
> an explanation on how marketing strategies are developed
> an analysis of past and predicted trends in marketing.

This paper reports on the survey results.

Methodology

ADMA conducted an online survey from 8 July to 20 August 2016. An invitation to participate in the survey was sent on 8 July 2016 to a sample industry section of 700 members of ADMA.

[1] www.cio.com/article/2904405/data-analytics/what-is-data-driven-marketing.html, accessed 11 November 2016.

In order to complete the research, ADMA publicised a marketing tools and trends survey across multiple channels, including email databases and social media, and surveyed 208 respondents.

research**acma**

Our research program—research**acma—**underpins our work and decisions as an evidence-informed regulator. It contributes to our strategic policy development, regulatory reviews and investigations, and helps us to make media and communications work for all Australians.

research**acma** has five broad areas of interest:

> market developments
> media content and culture
> social and economic participation
> citizen and consumer safeguards
> regulatory best practice and development.

This research contributes to the ACMA's social and economic participation research theme, which is directed to identifying regulatory settings and interventions that assist businesses and citizens participating in the offline and online environment.

Survey results

The results of the survey are provided per question and include a table and a chart.

About the business

Table 1: Business type of survey respondents

Business type	%	*n*
Business-to-business (B2B)	31	*64*
Business-to-consumer (B2C)	30	*62*
Advertising/Marketing agency	16	*34*
Not-for-profit	9	*19*
Other	14	*29*

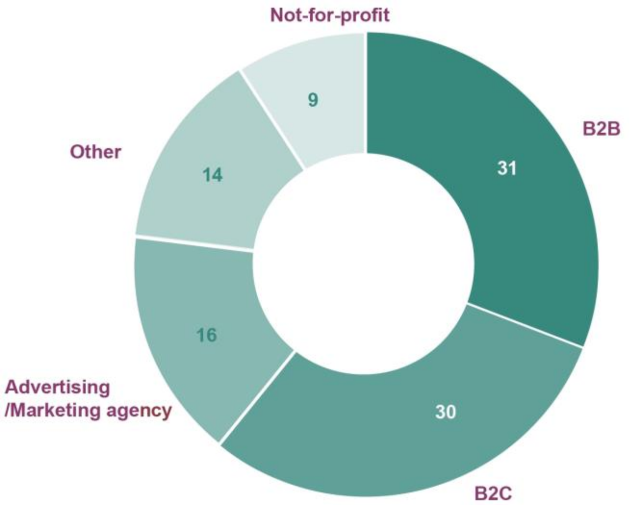
Question: Q1 'Your business is a?:'

Source: ADMA industry survey 2016 (n=208).

Business-to-business refers to a situation where one business makes a commercial transaction with another.

Business-to-consumer refers to a situation where one business makes a commercial transaction with a consumer.

Figure 1: Business type of survey respondents—by %



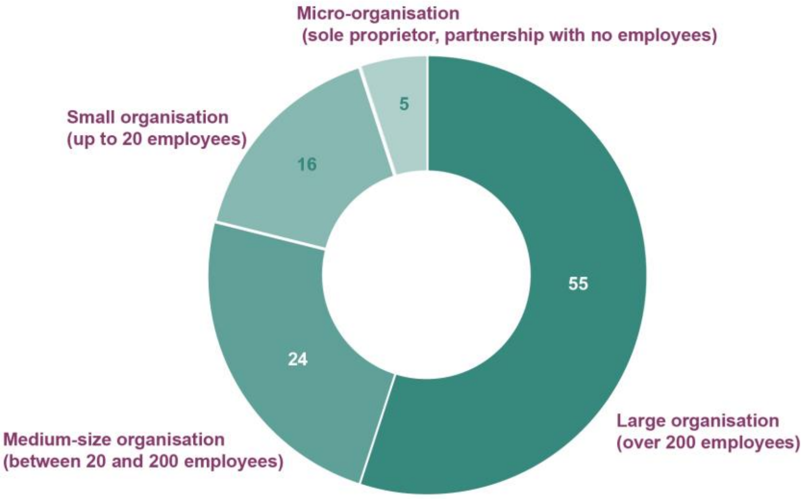
Source: ADMA industry survey 2016 (n=208).

Table 2: Business size of survey respondents

Business size	%	*n*
Large—over 200 employees	55	*115*
Medium—between 20 and 200 employees	24	*49*
Small—up to 20 employees	16	*33*
Micro—sole proprietor/partnership with no employees	5	*11*

Question: Q2 'Your business size is?:'
Source: ADMA industry survey 2016 (n=208).

Figure 2: Business size of survey respondents—by %



Source: ADMA industry survey 2016 (n=208).

Table 3: Industry sector of survey respondents

Industry sector	%	*n*
Financial services	16	*34*
Business-to-business services (B2B)	10	*21*
Technology	8	*16*
Telecommunications	7	*14*
Travel and hospitality	6	*12*
Consumer goods	5	*11*
Retail (predominantly catalogue and/or e-commerce)	5	*11*
Not-for-profit/charities	5	*11*
Entertainment, media and/or publishing	5	*10*
Automotive	5	*10*
Retail (predominantly 'brick and mortar' stores)	4	*8*
Utilities	3	*6*
Insurance	3	*6*
Government	3	*6*
Manufacturing	2	*4*
Healthcare and/or pharmaceuticals	1	*3*
Construction	1	*2*
Other	11	*23*

Question: Q3 'What industry sector are you in (or, for agencies, main sectors do you service)?' Unique response possible. Agriculture sector=0.

Source: ADMA industry survey 2016 (n=208).

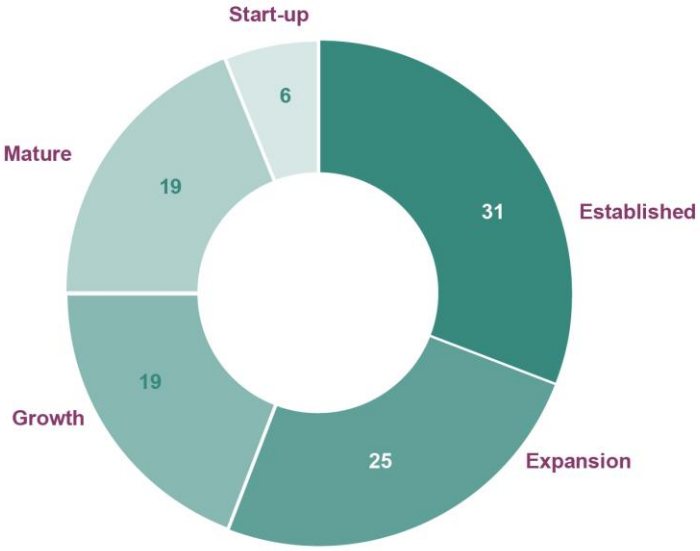
Table 4: Life-cycle position of survey respondents

Life cycle position	%	*n*
Established (business is routine)	31	*65*
Expansion (new markets and/or distribution channels)	25	*51*
Growth (profits are improving)	19	*40*
Mature (stable sales but lessening profits)	19	*39*
Start-up (trading as begun but margins are tight)	6	*13*
Seed (have yet to start trading)	-	*0*
Exit (sale of business or exit from failing market)	-	*0*

Question: Q4 'Which life-cycle category best describes your business?'

Source: ADMA industry survey 2016 (n=208).

Figure 3: Lifecycle position of survey respondents—by %



Source: ADMA industry survey 2016 (n=208).

Experience of respondents

Table 5: Years of marketing/advertising experience of survey respondents

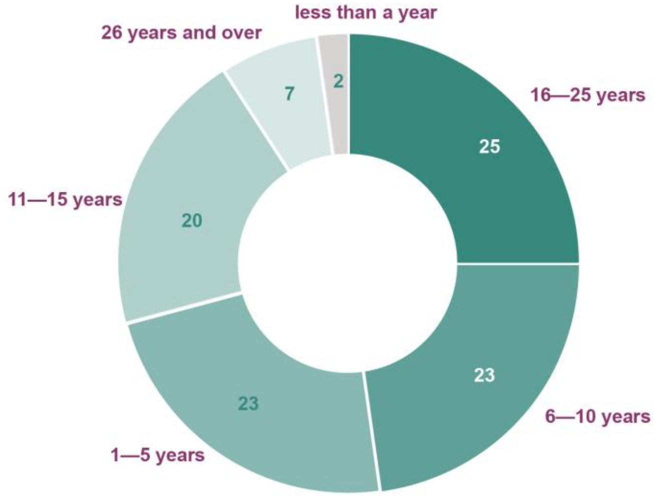
Experience	%	*n*
Less than a year	2	*4*
1–5 years	23	*48*
6–10 years	23	*48*
11–15 years	20	*41*
16–25 years	25	*53*
26 years and over	7	*14*

Question: Q5 'How many years of experience do you personally have in marketing/advertising? Please consider your current and past professional roles that may apply'.

Note: Years of personal experience in marketing/advertising considering current role and past roles that apply.

Source: ADMA industry survey 2016 (n=208).

Figure 4: Years of marketing/advertising experience of survey respondents—by %



Source: ADMA industry survey 2016 (n=208).

Use of marketing strategies

Table 6: Main marketing strategies used to acquire customers

Marketing strategy	%	*n*
Customer journey approach with multiple customer touch points for acquisition	34	*70*
Nurture approach building a connection with customers over time	20	*42*
Always a standalone or one-off acquisition campaign running	11	*22*
Sporadic one-off campaigns	10	*20*
Networking	9	*19*
Customer centric strategy, customer value determines communication approach	7	*15*
Sales and enquiry data*	3	*7*
Customer referrals*	3	*6*
Customer details from external sources (purchase, swap databases)	1	*3*
Other	2	*4*

Question: Q6 'What marketing strategies do you mainly use to acquire customers?'

**The categories sales and enquiry data, and customer referrals have been combined in the chart.*

Note: Examples provided for one off-acquisition campaign are online newsletter sign-up; continuous advertising. Examples provided for sporadic one-off campaign are trade-shows, one-off advertisement, mail-out, competition.

Source: ADMA industry survey 2016 (n=208).

Table 7: Use of direct marketing or data-driven marketing strategies

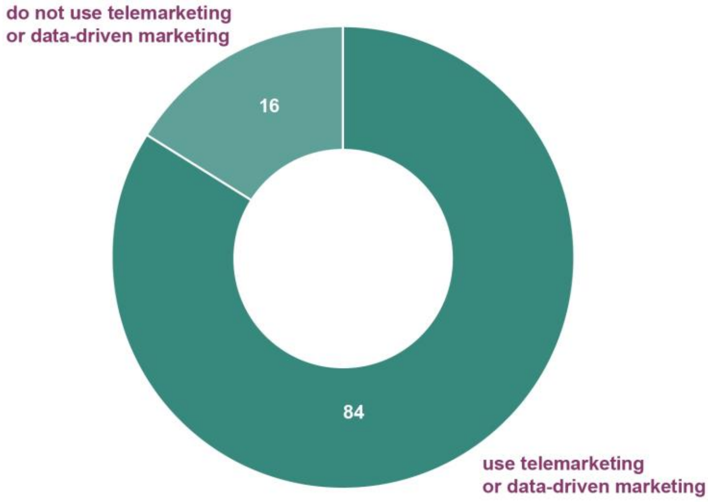
	%	*n*
Yes	84	*174*
No	16	*34*

Question: Q8 'Do you use direct marketing/data driven marketing strategies?'

Note: The question refers to direct marketing as using a standard database alone for marketing to consumers via email, telemarketing etc. Data-driven marketing refers to marketing following the enhancement of such databases by interpreting and analysing data therein.

Source: ADMA industry survey 2016 (n=208).

Figure 5: Use of direct marketing or data-driven marketing strategies—by %



Source: ADMA industry survey 2016 (n=208).

Customer data management

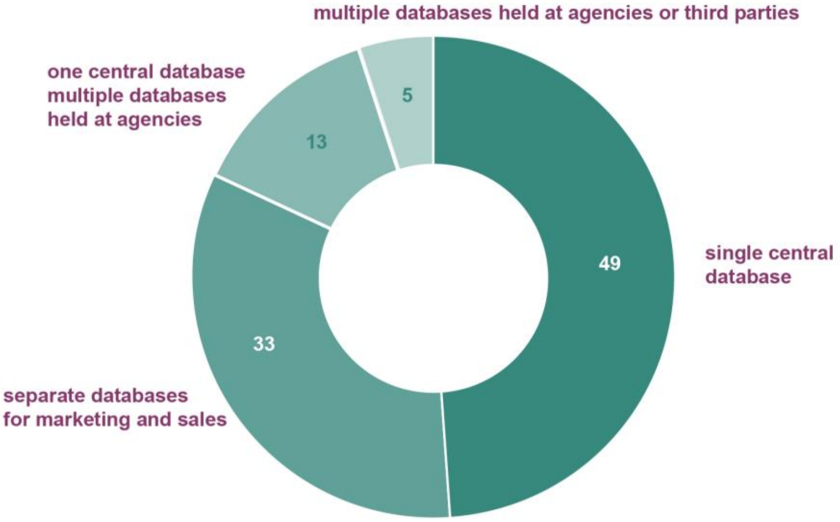
Table 8: How customer data is managed

Type of database	%	*n*
Single central database of all customers for marketing and sales	49	*84*
Separate (non-integrated) databases of all customers for marketing and sales	33	*57*
One main customer database internally, multiple databases for separate channels held by agencies	13	*23*
All customer data held in multiple databases at agencies or third parties	5	*8*

Question: Q9 'How do you manage your customer data?'

Source: ADMA industry survey 2016 (n=172).

Figure 6: How customer data is managed—by %



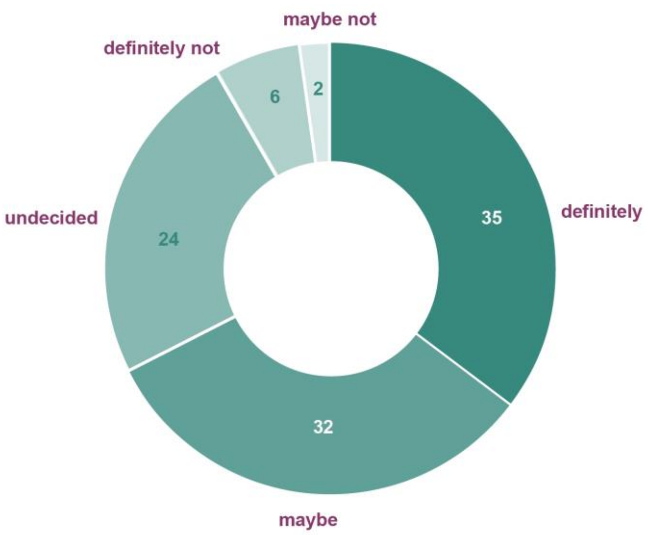
Source: ADMA industry survey 2016 (n=172).

Table 9: Intention to merge multiple customer databases

	%	*n*
Definitely	35	*22*
Maybe	32	*20*
Undecided	24	*15*
Definitely not	6	*4*
Maybe not	2	*1*

Question: Q10 'Do you intend to merge these multiple databases into one database?'
Source: ADMA industry survey 2016 (n=62).

Figure 7: Intention to merge multiple customer databases—by %



Source: ADMA industry survey 2016 (n=62).

Table 10: Where customer contact details are sourced

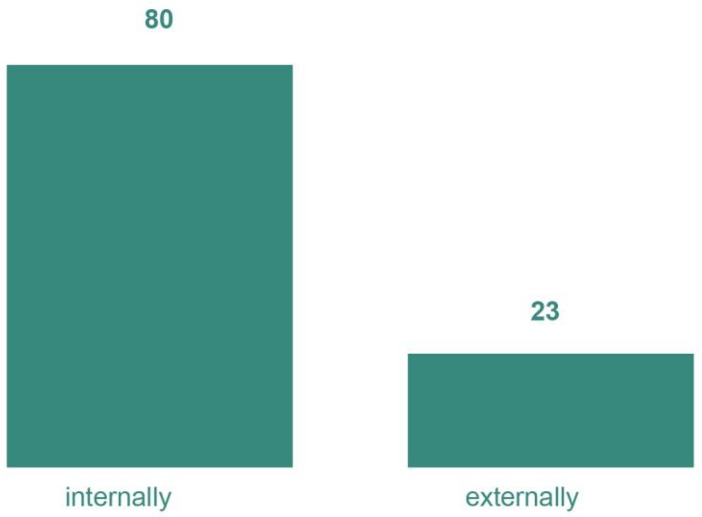
	average % reported by respondents	*n*
Internally (from sales information, records, website)	80	*123*
Externally (from agencies, brokers, public databases, publications)	23	*106*

Question: Q11 'In your marketing communications, what percent of customer contact details is sourced: Please provide as a percentage, the total must add up to 100%.'

Note: Percentage relates to the average percentage reported by respondents to the two categories.

Source: ADMA industry survey 2016 (n=123).

Figure 8: Where customer contact details are sourced—by %



Source: ADMA industry survey 2016 (n=123).

Table 11: Sources of internally-compiled customer contact data

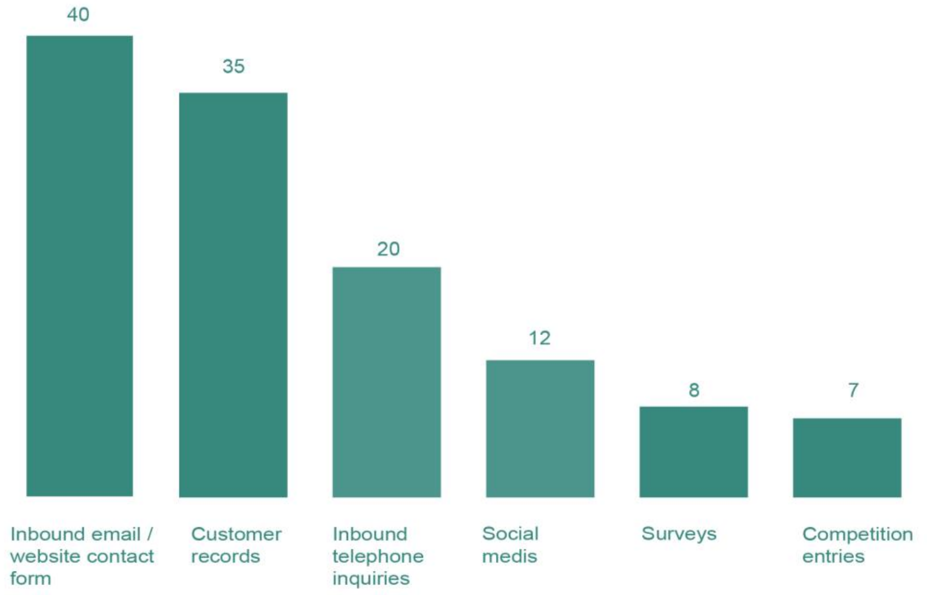
Source	Average % reported by respondents	*n*
Inbound email/website contact form	40	*110*
Customer records (e.g. warrantees or as part of provision of goods or services)	35	*100*
Inbound telephone inquiries	20	*88*
Social media	12	*103*
Surveys	8	*88*
Competition entries	7	*85*

Question: Q12 'As a percentage, of your internally compiled data, how much comes from. Note the total must add up to 100%.'

Note: Percentage relates to the average percentage reported by respondents.

Source: ADMA industry survey 2016 (n=123).

Figure 9: Sources of internally-compiled customer data—by %



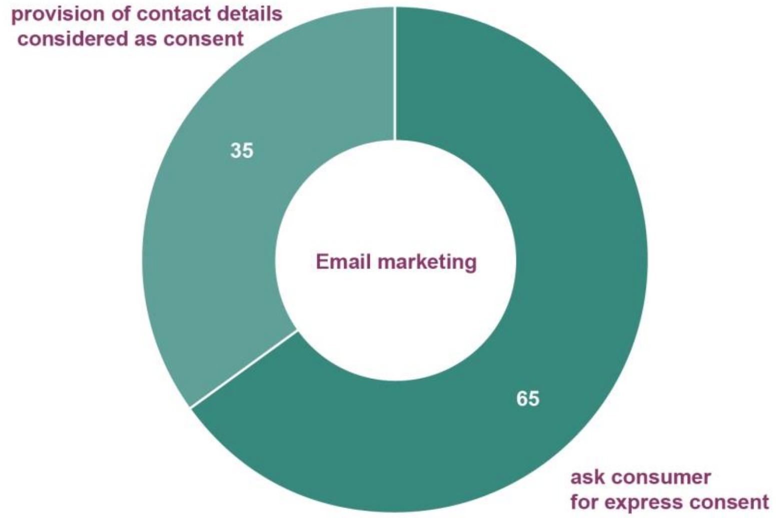
Source: ADMA industry survey 2016 (n=123).

Table 12: Customer consent when collating data for email marketing

	%	*n*
Ask your customers for express consent to contact them for marketing purposes	65	*80*
Use consumer provision of contact details as consent to be contacted for marketing purposes	35	*43*

Question: Q13 'When collating data internally for email marketing, do you?:'
Source: ADMA industry survey 2016 (n=123).

Figure 10: Customer consent when collating data for email marketing—by %



Source: ADMA industry survey 2016 (n=123).

Table 13: Customer consent when collating data for telemarketing

	%	*n*
Ask your customers for express consent to contact them for marketing purposes	59	*73*
Use consumer provision of contact details as consent to be contacted for marketing purposes	41	*50*

Question: Q14 'When collating data internally for telemarketing, do you:'
'Source: ADMA industry survey 2016 (n=123).

Figure 11: Customer consent when collating data for telemarketing—by %

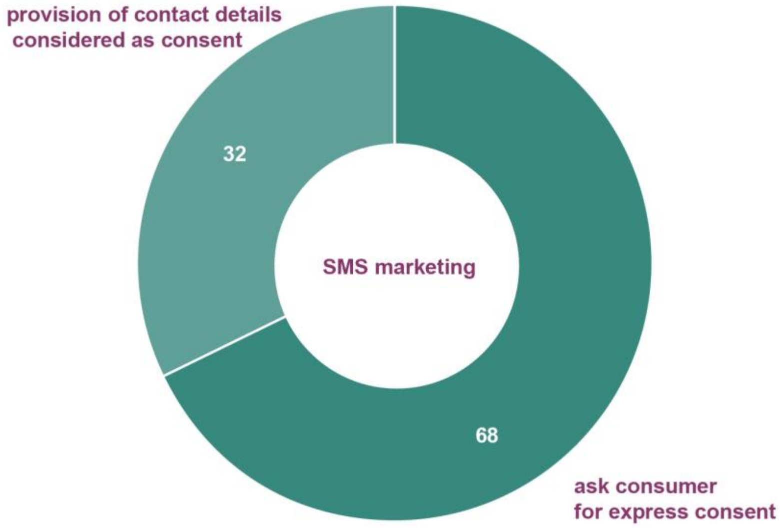
Source: ADMA industry survey 2016 (n=123).

Table 14: Customer consent when collating data for SMS marketing

	%	*n*
Ask your customers for express consent to contact them for marketing purposes	68	*81*
Use consumer provision of contact details as consent to be contacted for marketing purposes	32	*38*

Question: Q15 'When collating data internally for SMS marketing, do you?'
Source: ADMA industry survey 2016 (n=119).

Figure 12: SMS marketing and customer consent to be contacted—by %



Source: ADMA industry survey 2016 (n=119).

Externally-sourced data

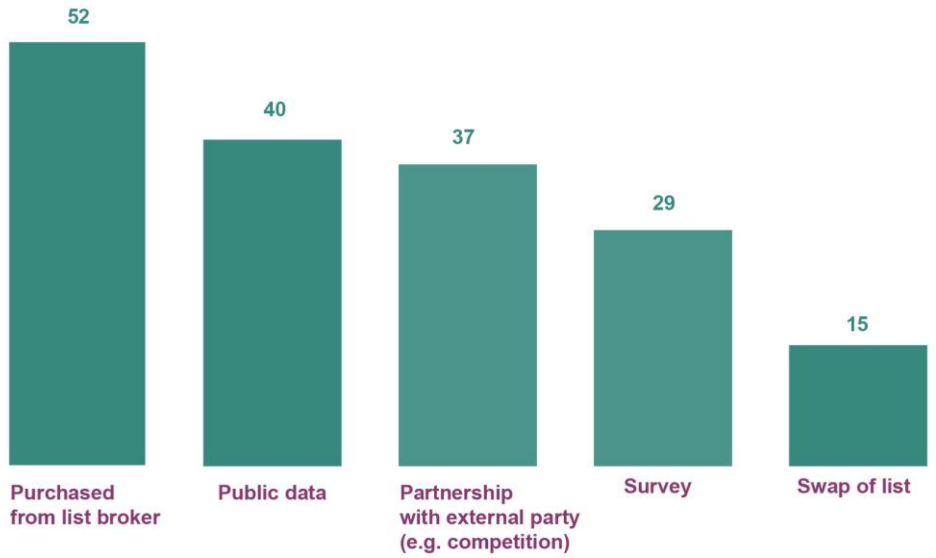
Table 15: Acquisition of externally-sourced customer contact details

Source	%	*n*
Acquired from an external party (purchased from a list broker)	52	*50*
Acquired from public data (e.g. social media, telephone book)	40	*39*
Acquired from a partnership with external party (e.g. a competition run on behalf of multiple parties)	37	*36*
Acquired from a survey	29	*28*
Acquired from a partnership with external party (a swap of lists)	15	*15*

Question: Q16 'For externally-sourced data, where you sourced customer contact details? (Tick all that apply)' (Multiple response).

Source: ADMA industry survey 2016 (n=97).

Figure 13: Acquisition of externally-sourced customer contact details —by %



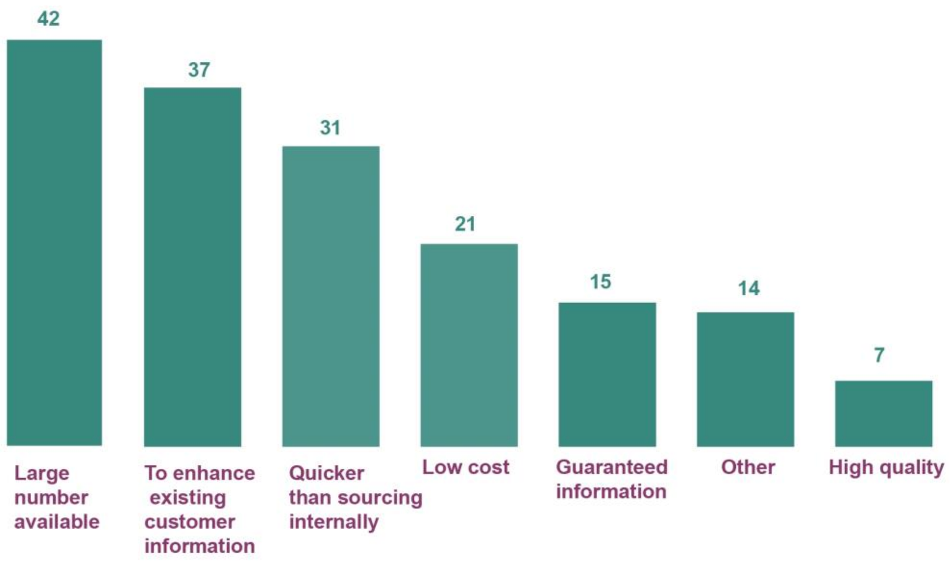
Source: ADMA industry survey 2016 (n=97).

Table 16: Main benefits of using external data

Benefit	%	*n*
Large number available	42	*34*
Ability to enhance existing customer information	37	*30*
Quicker than sourcing internally	31	*25*
Low cost	21	*17*
Guaranteed information	15	*12*
High quality	7	*6*
Other	14	*11*

Question: Q17 'What are the main benefits of using external data? (Tick all that apply).' (Multiple response)
Source: ADMA industry survey 2016 (n=81).

Figure 14: Main benefits of using external data —by %



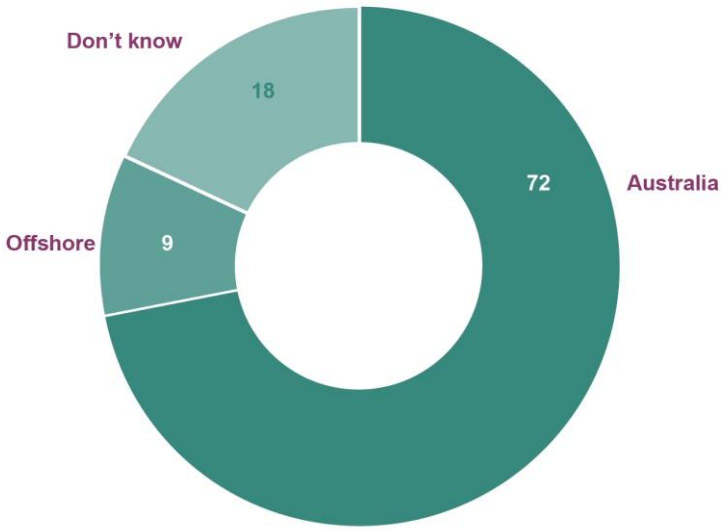
Source: ADMA industry survey 2016 (n=81).

Table 17: Location of external data provider

	%	*n*
Australia	72	*64*
Offshore	9	*8*
Don't know	18	*16*

Question: Q18 'Is your external data provider based in Australia or offshore?' (Multiple response)
Percentage based on the total number of responses (n=88).
Source: ADMA industry survey 2016 (n=82).

Figure 15: Location of external data provider—by %



Percentage based on the total number of responses (n=88).
Source: ADMA industry survey 2016 (n=82).

Table 18: Influence of the location of the external data-provider in the choice of provider

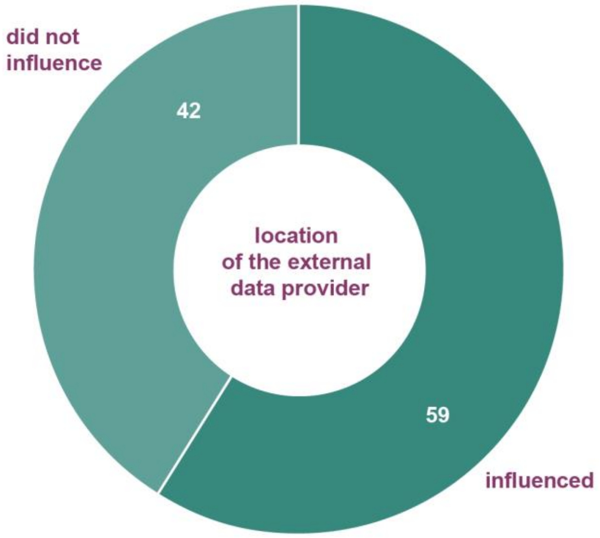
	Average % reported by respondents	*n*
Yes	59	*48*
No	42	*34*

Question: Q19 'Did the location of your external data-provider influence your decision?'

Source: ADMA industry survey 2016 (n=82).

Note: Percentage relates to the average percentage reported by respondents.

Figure 16: Influence of the location of the external data-provider in the choice of provider—by %



Source: ADMA industry survey 2016 (n=82).

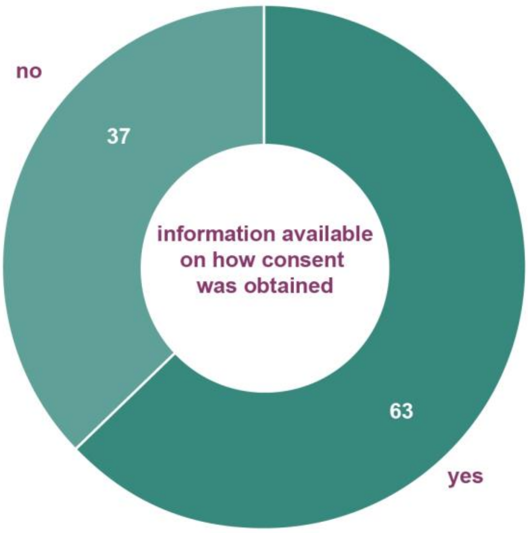
Table 19: Inclusion of information regarding consent in externally-sourced contact details' lists

	%	*n*
Yes	63	*59*
No	37	*35*

Question: Q20 'In sourcing contact details from an external source, do these lists contain specific details on how communication consent was given (e.g. ticking a box on a form, clicking 'accept' on a website, confirming during a phone call)'.

Source: ADMA industry survey 2016 (n=94).

Figure 17: Inclusion of information regarding consent in externally-sourced contact details' lists by %



Source: ADMA industry survey 2016 (n=94).

Marketing channels

Table 20: Preferred direct/data-driven marketing channels

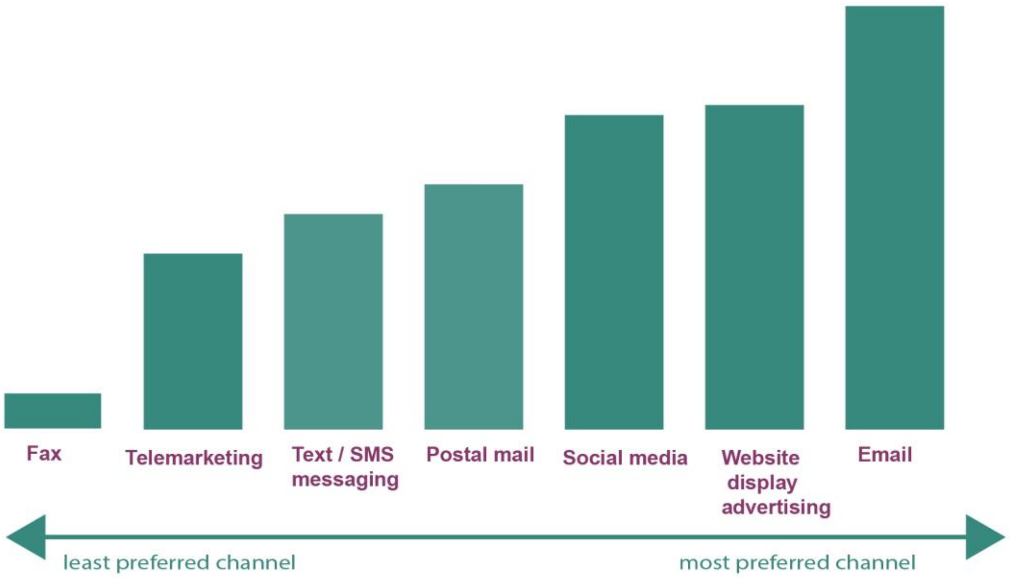
Channel	Weighted average	*n*
Email	4.5	*66*
Website display advertising	3.3	*63*
Social media (e.g. Facebook, Twitter, Instagram)	3.2	*62*
Postal mail	2.5	*55*
Text/SMS mobile messaging	2.2	*50*
Telemarketing	1.8	*49*
Fax	0.4	*32*

Question: Q21 'What are your preferred direct/data driven marketing channels? (Number from 1 for your least preferred to 6 for your most preferred').

Note for the analysis the scale used was reversed compared to the one used in the questionnaire.

Source: ADMA industry survey 2016 (n=67).

Figure 18: Preferred direct/data-driven marketing channels



Source: ADMA industry survey 2016 (n=67).

Table 21: Frequency of use of marketing channels

Channel *(No. of respondents)*	Hourly	Daily	Weekly	Monthly	Every 4–8 weeks	Every 6 months	Yearly	Never	*Total n*
Social media	10	27	18	2	3	2	2	0	*64*
Email	6	18	15	18	3	4	2	0	*66*
Website display advertising	9	19	14	10	3	3	3	1	*62*
Postal mail	0	7	9	9	7	14	4	8	*58*
Text/SMS mobile messaging	2	8	3	9	5	10	3	14	*54*
Telemarketing	2	9	8	4	5	4	4	16	*52*
Fax	0	3	0	1	0	0	2	36	*42*

Question: Q22 'For each channel indicated, how often do you use this channel?'
Source: ADMA industry survey 2016 (n=67).

Figure 19: Frequency of use of marketing channels

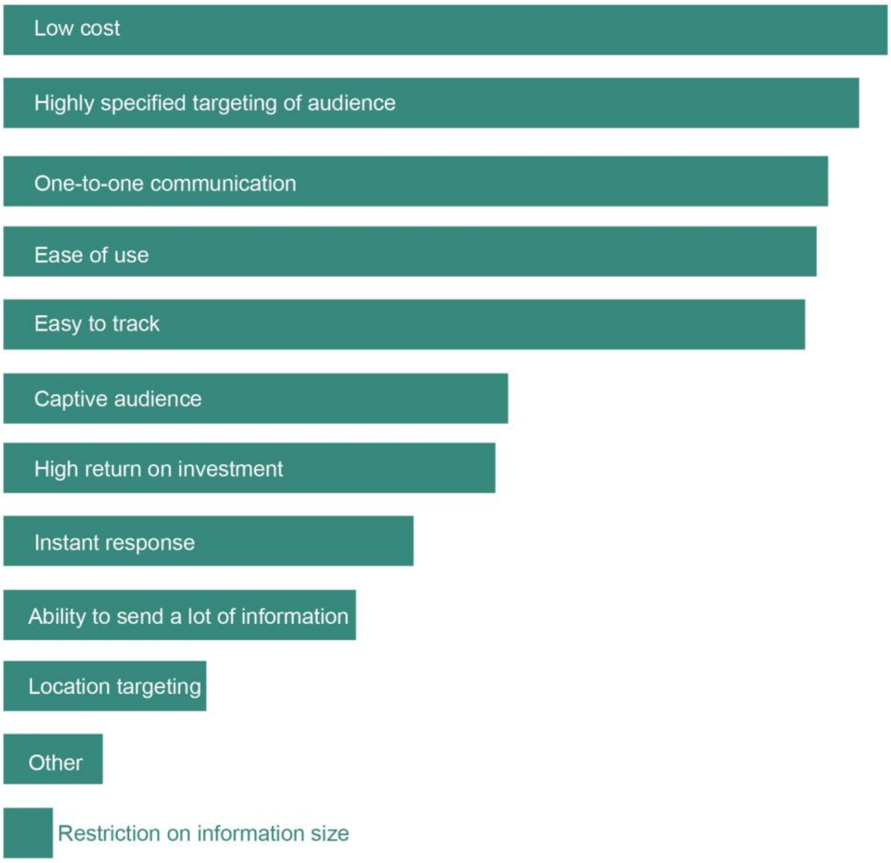
Source: ADMA industry survey 2016 (n=67).

Table 22: Reasons for channel use and main benefits

Benefits *(No. of respondents)*	Email *(65)*	Web display ad *(61)*	Social media *(63)*	Postal mail *(46)*	Text /SMS *(37)*	Tele-marketing *(36)*	Fax *(13)*
Low cost	49	21	29	4	18	6	3
Highly specified targeting of audience	36	23	29	12	14	12	1
One-to-one communication	38	4	16	21	19	21	1
Ease of use	34	27	27	9	15	4	2
Easy to track	48	29	26	5	7	9	0
Captive audience	17	11	17	12	10	6	1
High return on investment	25	14	19	8	8	2	2
Instant response	12	8	16	1	9	16	0
Ability to send a lot of information	20	6	6	18	1	2	0
Location targeting	5	4	7	6	0	0	0
Restriction on information size	1	3	2	1	0	0	0
Other	1	1	1	1	1	2	5

Question: Q23 'Why use this channel, what are the main benefits: Please tick all that apply?.'
Source: ADMA industry survey 2016 (n=67).

Figure 20: Reasons for channel use and main benefits



Source: ADMA industry survey 2016 (n=67).

Table 23: Main drawbacks of marketing channels

Drawbacks *(No. of respondents)*	Email *(61)*	Web display ad *(51)*	Social media *(47)*	Postal mail *(50)*	Text / SMS *(39)*	Tele-marketing *(41)*	Fax *(22)*
Customers actively avoid communication via this channel	21	14	7	8	9	21	8
High cost	2	15	3	33	5	21	7
Can't track what happens after it is sent	6	7	10	24	12	2	8
Message restrictions	11	13	10	0	21	5	3
Takes time to set up	23	10	6	16	1	3	2
Regulation and compliance issues	20	5	5	7	8	13	0
No delivery guarantee	13	9	10	14	6	0	3
Staff with the right channel skills are hard to find	7	10	12	2	2	10	1
Getting relevant data is difficult	13	4	6	4	4	3	3

Question: Q24 'What are the main drawbacks of this channel (Please tick all that apply)?'
Source: ADMA industry survey 2016 (n=67).

Figure 21: Main drawbacks of marketing channels

Source: ADMA industry survey 2016 (n=67).

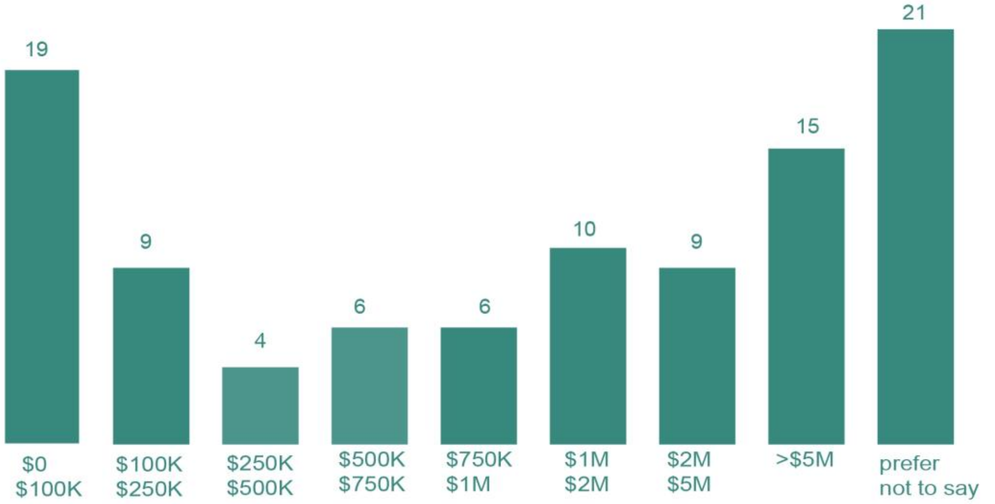
Marketing budgets

Table 24: Annual marketing budget

Annual marketing budget	%	*n*
$0–100K	19	*13*
$100K–250K	9	*6*
$250K–500K	4	*3*
$500K–750K	6	*4*
$750K–1M	6	*4*
$1M–2M	10	*7*
$2M–5M	9	*6*
$5M+	15	*10*
Prefer not to say	21	*14*

Question Q25: 'Approximately, what is your annual marketing budget?'
Source: ADMA industry survey 2016 (n=67).

Figure 22: Annual marketing budget—by %



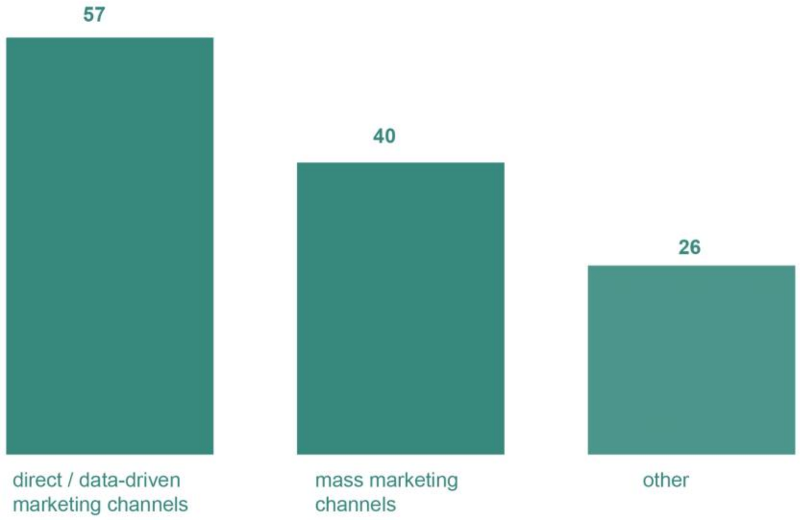
Source: ADMA industry survey 2016 (n=67).

Table 25: Marketing budget spend per channel

Type of expenditure	Average % reported by respondents	*n*
Direct/data-driven marketing channels	57	*67*
Mass marketing channels	40	*58*
Other	26	*19*

Question: Q26 'What percentage of your marketing budget is spent on: (must add up to 100%)
Source: ADMA industry survey 2016 (n=67).
Note: Percentage relates to the average percentage reported by respondents.

Figure 23: Marketing budget spend per channel—by %



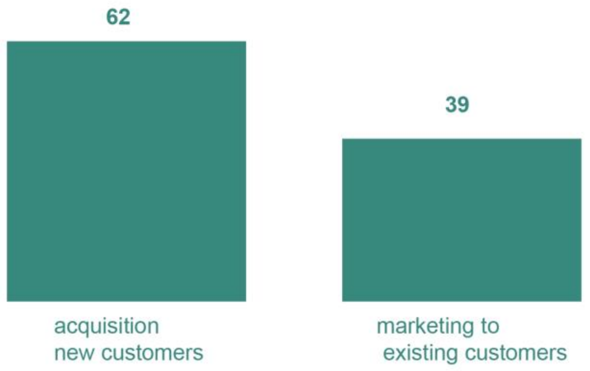
Source: ADMA industry survey 2016 (n=67).

Table 26: Marketing budget spent on new customers' acquisition vs. existing customers

Type of expenditure	Average % reported by respondents	*n*
Acquisition of new customers	62	*64*
Marketing to existing customers	39	*62*

Question: Q27 'What percentage of your marketing budget is spent on' (must add up to 100%)
Source: ADMA industry survey 2016 (n=64).
Note: Percentage relates to the average percentage reported by respondents.

Figure 24: Marketing budget spent on new customers' acquisition vs. existing customers—by %



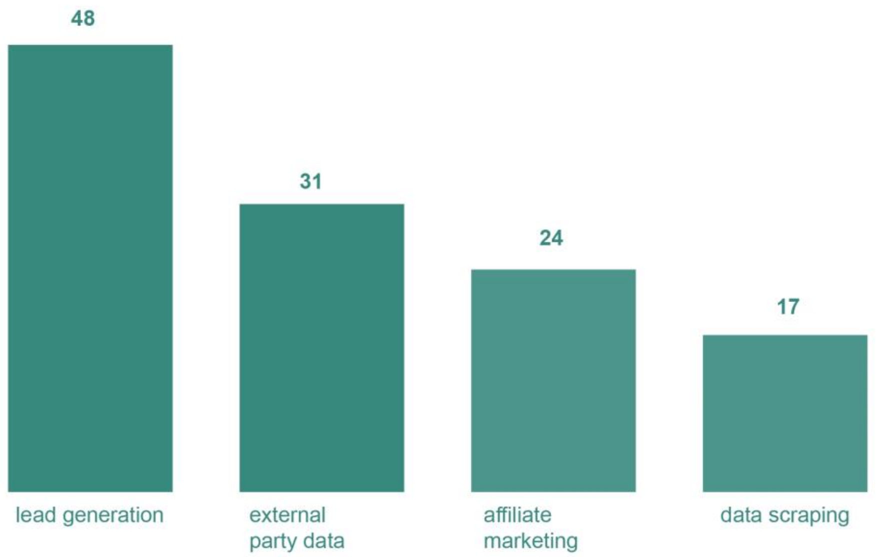
Source: ADMA industry survey 2016 (n=64).

Table 27: Acquisition budget spend

Type of expenditure	Average % reported by respondents	*n*
Lead generation (e.g. telemarketing, competitions, website newsletter)	48	*57*
Affiliate marketing	31	*46*
External party data/outsourced data (purchased from a list broker)	24	*53*
Data scraping (sourcing data from public information, e.g. social media, phone book)	17	*46*

Question: Q28 'What percentage of your acquisition budget is spent on?'
Source: ADMA industry survey 2016 (n=62).
Note: Percentage relates to the average percentage reported by respondents.

Figure 25: Acquisition budget spend—by %



Source: ADMA industry survey 2016 (n=62).

Table 28: Allocation of marketing budget by channels

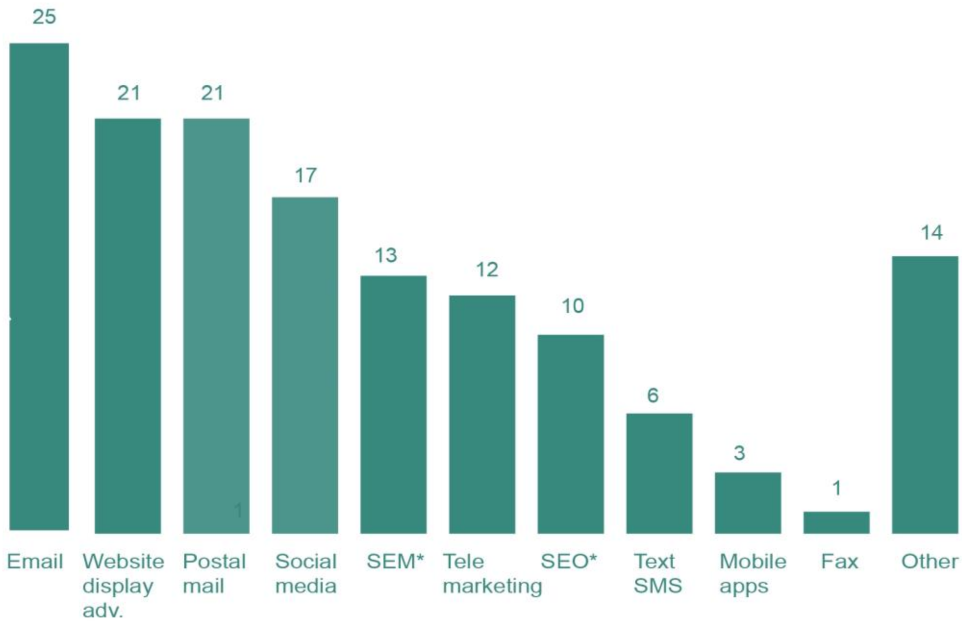
Type	Average % reported by respondents	*n*
Email	25	*64*
Website display advertisement	21	*59*
Postal mail	21	*48*
Social media	17	*54*
Search engine marketing (SEM)	13	*43*
Telemarketing	12	*38*
Search engine optimisation (SEO)	10	*43*
Text/SMS mobile messaging	6	*38*
Mobile apps	3	*20*
Fax	1	*23*
Other	14	*17*

Question: Q29 'What percentage of your direct/data-driven marketing budget is spent on? Note the total must add up to 100%.'

Source: ADMA industry survey 2016 (n=67).

Note: Percentage relates to the average percentage reported by respondents.

Figure 26: Allocation of marketing budget by channels



Note: SEM stands for search engine marketing and SEO for search engine optimisation.
Source: ADMA industry survey 2016 (n=67).

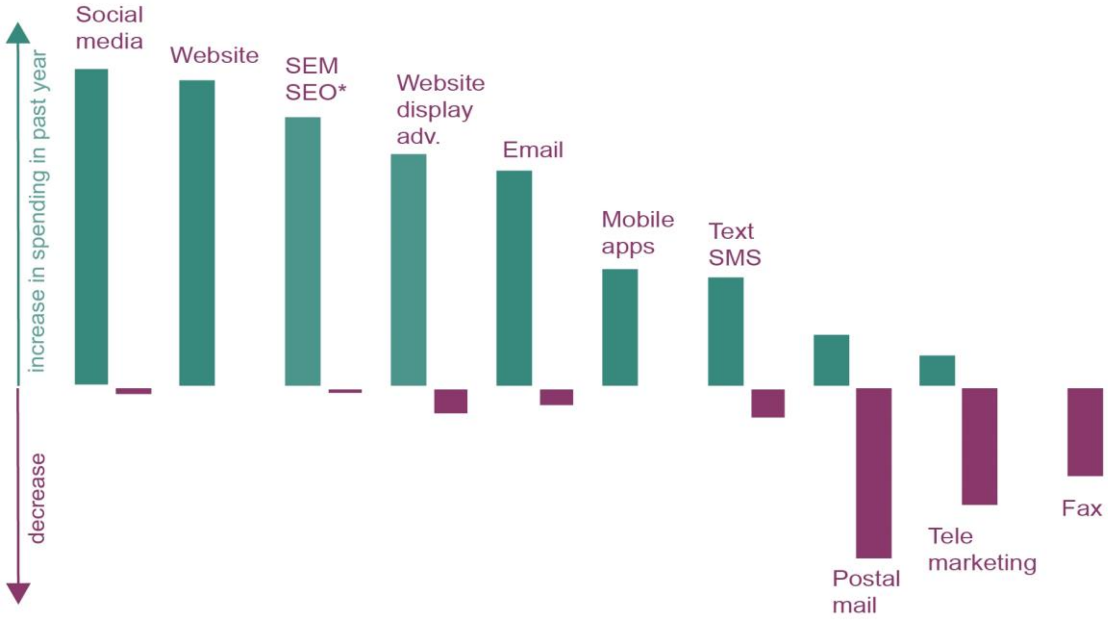
Use of marketing channels

Table 29: Changes in marketing spend by channel over the past year

Channels	Decreased significantly (%)	Decreased (%)	No change (%)	Increased (%)	Increased significantly (%)	*n*
Website (your own site)	0	0	24	60	15	*58*
Social media	0	2	21	52	26	*62*
Search engine marketing or optimisation (SEM or SEO)	0	2	32	49	17	*59*
Website display advertisement	0	7	36	42	15	*59*
Email	2	3	42	47	6	*64*
Text/SMS mobile messaging	2	6	65	25	2	*52*
Mobile apps	0	0	71	23	6	*48*
Telemarketing	8	21	64	6	2	*53*
Postal mail	14	28	46	11	2	*57*
Fax	20	2	77	0	0	*44*
Other	8	3	74	10	5	*39*

Question: Q30 'How has your spending on each of the following marketing channels changed over the past year?'
Source: ADMA industry survey 2016 (n=67).

Figure 27: Changes in marketing spend by channel over the past year—by %



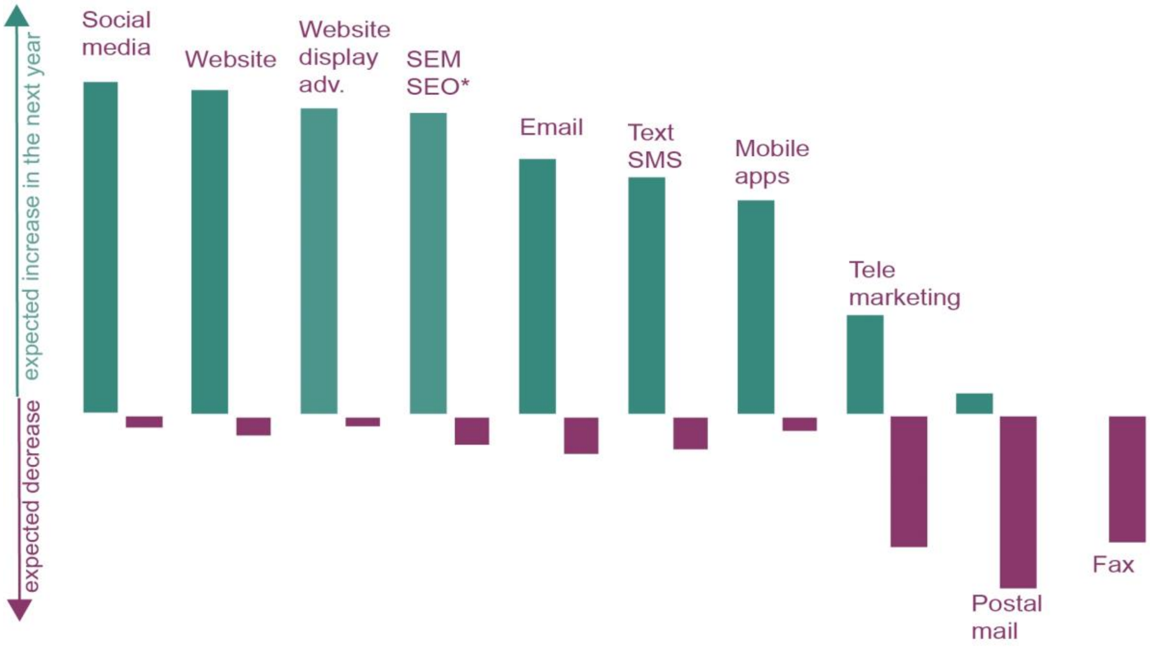
Note: SEM stands for search engine marketing and SEO for search engine optimisation.
Source: ADMA industry survey 2016 (n=67).

Table 30: Expected change in use of channels over the next year

Channel	Decrease significantly (%)	Decrease (%)	No change (%)	Increase (%)	Increase significantly (%)	*n*
Website (your own site)	0	5	24	56	15	*62*
Email	0	9	34	53	3	*64*
Social media	0	3	25	45	28	*65*
Search engine marketing or optimisation (SEM or SEO)	0	7	27	47	19	*59*
Website display advertisement	0	3	30	47	20	*60*
Mobile apps	0	4	49	27	20	*51*
Text/SMS mobile messaging	0	8	40	46	6	*52*
Telemarketing	7	22	48	22	0	*54*
Postal mail	11	27	57	5	0	*56*
Fax	16	12	72	0	0	*43*
Other	5	3	76	11	5	*38*

Question: Q31 'How do you expect your spending to change over the next year for these channels?'
Source: ADMA industry survey 2016 (n=67).

Figure 28: Expected change in use of channels over the next year—by %



Note: SEM stands for search engine marketing and SEO for search engine optimisation.
Source: ADMA industry survey 2016 (n=67).

Use of real-time data

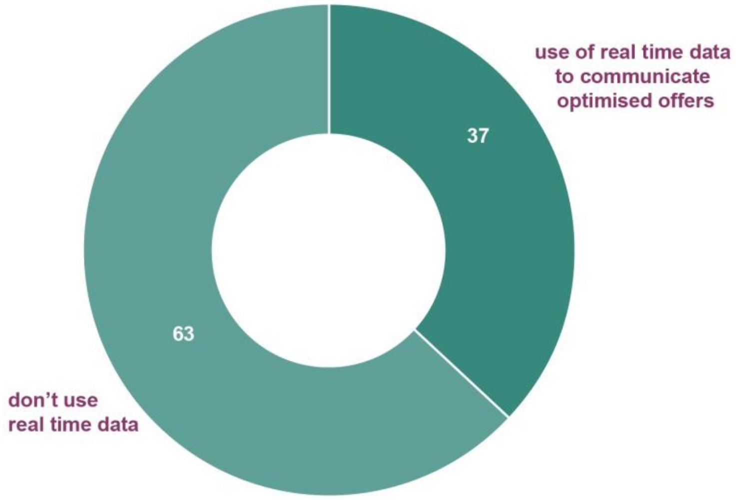
The use of real-time data refers to real-time marketing, which involves marketing messages being sent to the consumer a few seconds to a few hours after a triggering action or interaction.

Table 31: Use of real-time data to communicate optimised offers

	%	*n*
Yes	37	*25*
No	63	*42*

Question: Q32: 'Do you use real-time data to communication optimised offers (e.g. a specific customer behaviour, like checking on a social media triggers a specific action to communication)'
Source: ADMA industry survey 2016 (n=67).

Figure 29: Use of real-time data to communicate optimised offers—by %



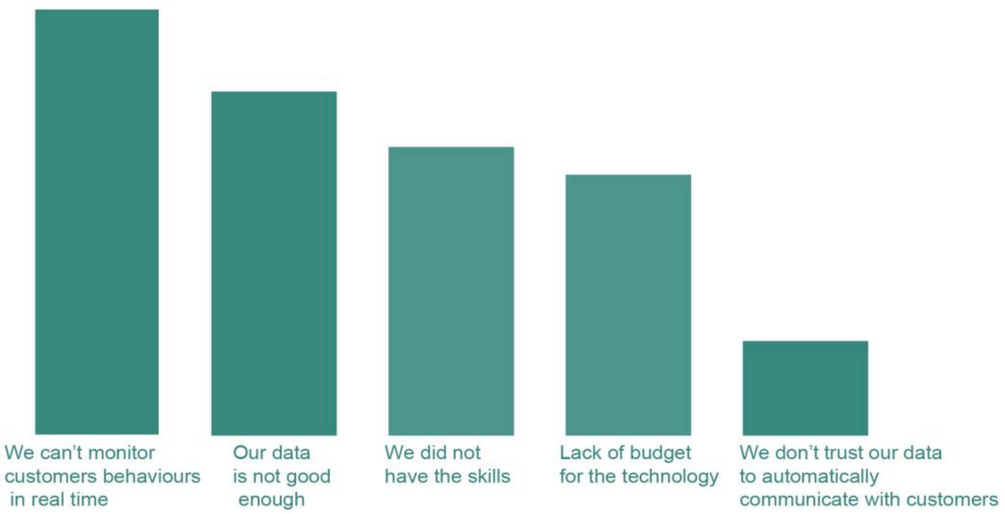
Source: ADMA industry survey 2016 (n=67).

Table 32: Reasons for not using real time data

Reasons	%	*n*
We can't monitor customer behaviours in real time	31	*22*
Our data isn't good enough	25	*18*
We do not have the skills to make it work	21	*13*
We don't have the budget for the technology	19	*14*
We don't trust our data to automatically communicate with customers	7	*5*

Question: Q33: 'Why do you not use real-time data?'
Source: ADMA industry survey 2016 (n=42).

Figure 30: Reasons for not using real time data—by %



Source: ADMA industry survey 2016 (n=42).

Table 33: Use of real-time data by channel

Channels	Currently (%)	Plan to (%)	Not considering (%)	*n*
Email	68	26	5	*17*
Social media	65	30	5	*20*
Website content	62	24	14	*21*
Text/SMS messaging	42	32	26	*19*
Retargeting display*	42	42	16	*19*
Mobile apps	29	41	29	*17*

Question: Q34 'Which of the following channels to you use with real-time data?'

Source: ADMA industry survey 2016 (n=21).

**Retargeting display refers to a form of marketing targeting users who have previously visited your website with banners ads on display networks across the web. It differs from normal display, which tends to target users in the first stages of the buying funnel.*

Note: This is a low sample size (n=21)—results provided for information only. For this reason, no chart has been provided for this question Q34 in the survey.

Changes in technology

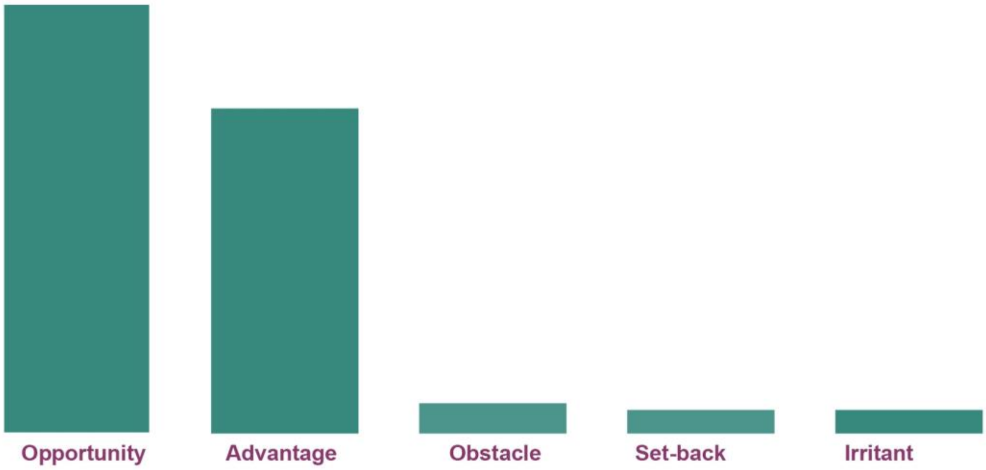
Table 34: Impact on marketing of changes in technology

Type of impact	%	*n*
Opportunity—it creates new openings and opportunities to interact with our markets	66	*37*
Advantage—it becomes an essential element in a new market offering	50	*28*
Obstacle—it creates an obstacle we have to navigate to continue our marketing	5	*3*
Set-back—it hinders our marketing efforts so much we have to make big changes	4	*2*
Irritant—it means we have to adjust our marketing slightly	4	*2*

Question: Q35 'What impact does changes in technology have on marketing today?'

Source: ADMA industry survey 2016 (n=56).

Figure 31: Impact on marketing of changes in technology—by %



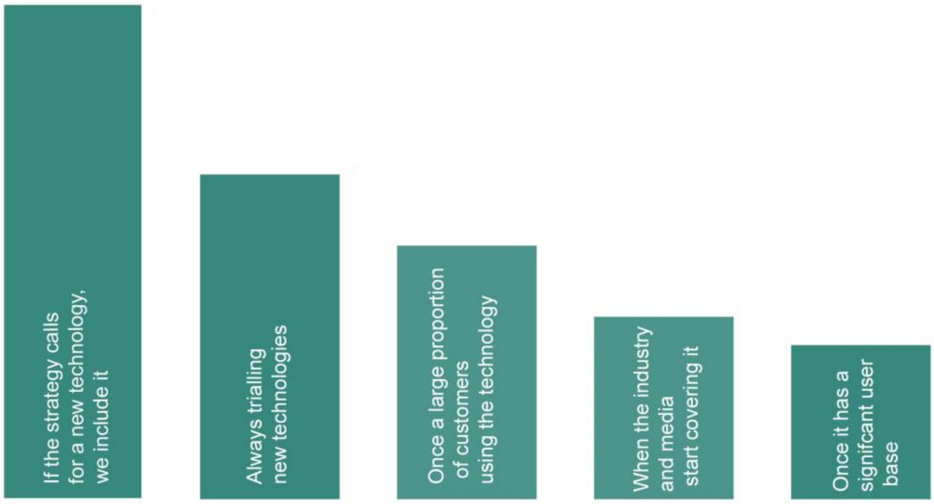
Source: ADMA industry survey 2016 (n=56).

Table 35: Decisions to incorporate new technologies

Factors considered	%	*n*
If our strategy calls for a new technology we include it	36	*20*
We are always trialling new technologies	23	*13*
Once we see a large proportion of our customers using the technology	18	*10*
When the industry and media start covering it	13	*7*
Once the technology has a significant user base	11	*6*

Question: Q36 'In terms of incorporating new technologies, how do you decide which technologies to include in your marketing?'
Source: ADMA industry survey 2016 (n=56).

Figure 32: Decisions to incorporate new technologies



Source: ADMA industry survey 2016 (n=56).

researchacma

Canberra
Red Building
Benjamin Offices
Chan Street
Belconnen ACT

PO Box 78
Belconnen ACT 2616

T +61 2 6219 5555
F +61 2 6219 5353

Melbourne
Level 32
Melbourne Central Tower
360 Elizabeth Street
Melbourne VIC

PO Box 13112
Law Courts
Melbourne VIC 8010

T +61 3 9963 6800
F +61 3 9963 6899

Sydney
Level 5
The Bay Centre
65 Pirrama Road
Pyrmont NSW

PO Box Q500
Queen Victoria Building
NSW 1230

T +61 2 9334 7700
1800 226 667
F +61 2 9334 7799