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**The benchmark study
marketing technology
and strategy**

The 3rd major German company study conducted with over
1.000 company decision makers determines the position for
marketing technology and marketing strategy, transparency
and benchmarking.

This time the focus is on strategies, objectives, controlling
instruments (KPI frameworks), use of data and project
organization.

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1 MARKETING TECH … CONTINUES TO GAIN MOMENTUM

We have been delighted and moved by the overwhelming feedback on the 2019 and 2020 editions of the *Marketing Tech Monitor*, but this has also shown that there is – and will be – a tremendous need for well-founded information about strategies, concepts, tools, and best practices when it comes to marketing tech across a wide range of industry segments and sizes. Factors such as limitations on the collection of third-party cookie data pursuant to the ePrivacy directive and Google's announcement that, in the future, it will allow neither third-party cookies in *Chrome* nor alternative ID solutions provided by third parties have contributed to further raising the bar for what people expect from setting up and expanding data-driven marketing by establishing one's own opt-ins and first-party data.

The analysis presented here and the procedure model are meant to, once again, serve as a basis for companies, helping them to introduce and/or transform their marketing tech stack systematically and successfully and providing an impetus for effectively meeting all challenges regarding strategy, concept, and implementation. We sincerely hope that the *Marketing Tech Monitor 2021* (144 pages in total), which is once more the result of a collaboration with leading companies and partners, can provide much needed help in navigating this rapidly growing market.

As always, we welcome any questions and look forward to further discussions.

Ralf Strauß & Kerstin Clessienne & Kerstin Pape
Hamburg/Frankfurt, June 2021

2 MARKETING TECH … AN EVOLUTIONARY LEAP IN THE FIELD OF MARKETING

A. Marketing Tech – Systematization

Marketing tech (or *MarTech*) basically refers to a wide variety of different technologies that are employed by companies to supplement and automate their marketing activities using IT applications. These applications include more traditional CRM scenarios (e.g., marketing resource management / MRM), customer data platforms, marketing mix modeling, and adtech solutions (**illustration 1**). Although categorizing all the different application scenarios and tools in their entirety is hardly possible, it still helps to analyze individual functional dimensions and to determine to what extent these individual technologies overlap functio-

nally. A lack of such a **functional blueprint** leads to a lack of clarity when it comes to developing a strategy, often resulting in a superabundance of technical platforms. As a consequence, there are conflicts of competence between different functional areas (e.g., ¨Which system takes precedence?¨), overlicensing of IT applications, and, subsequently, escalating implementation, interface, and maintenance costs. The aim is to develop an overarching strategy and a subsequent marketing technology stack that serves as a ¨central engine room¨ and can be accessed by all functional areas in a uniform manner.
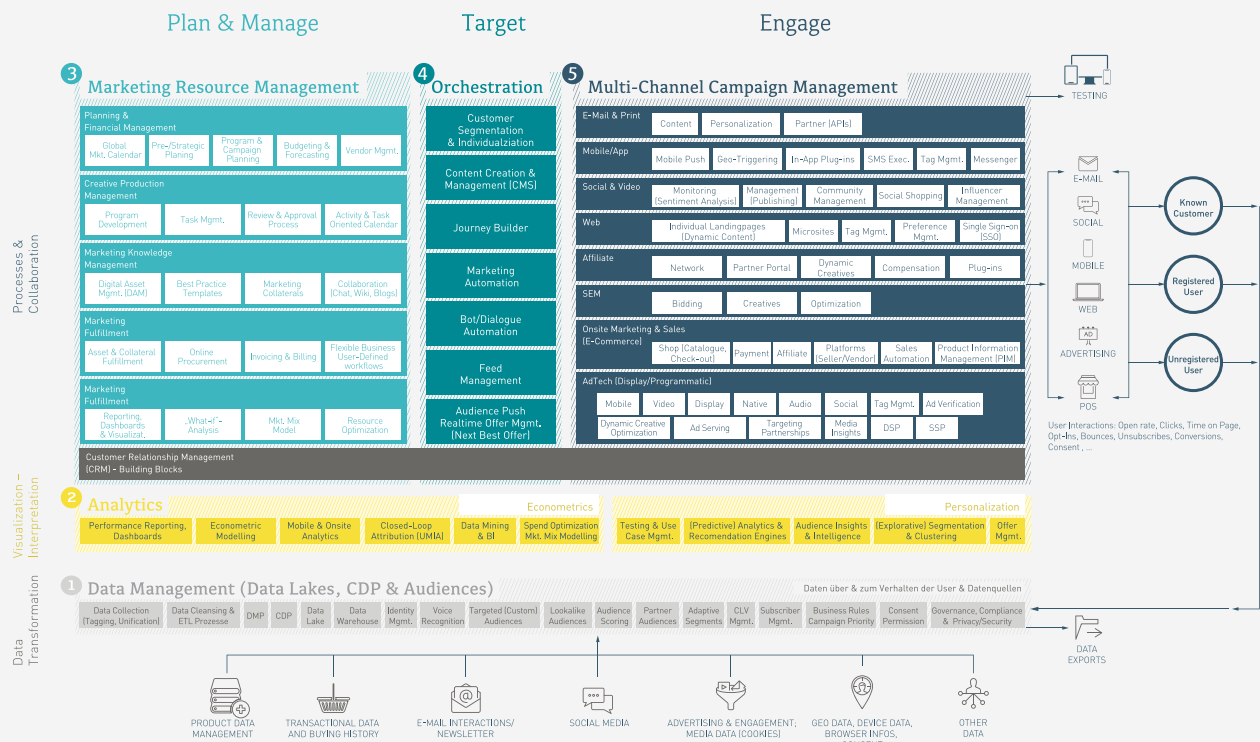
Illustration 1: Building blocks of a marketing tech stack (schematic 2021)

B. Study design
Marketing Tech Monitor 2021

As part of the study, a total of 1,084 marketing managers and directors as well as digital marketing / online marketing managers in Germany, Austria, and Switzerland were approached between March 8 and March 26, 2021, based on their membership in the *CMO Community* and the *Digital CMO Community*. This generated 257 full replies. At the same time, *Statista Q* invited members of this target group

to participate in the survey, contacting them in several waves. A high response rate and the immediate feedback on the survey once again show the topicality of the subject and the need for further development. In order to gain additional, in-depth insights, the study also included approximately 30 qualitative expert interviews.

3 THE GOOD, THE BAD, AND THE UGLY … THE VITAL IMPORTANCE OF STRATEGY …

Companies still have a lot of catching up to do when it comes to adopting a fundamental strategic approach to the paradigm shift regarding customer communications and marketing investment in the field of data-driven marketing. When it comes to deciding on a marketing tech strategy, companies are faced with the challenge of having to choose from a myriad of applications because there are more than 10,000 different ones (as of May 2021). A consolidation of this multitude of applications has long been called for but has yet to occur, and a categorization is becoming increasingly difficult, as many platforms have their own particular way of bundling together and labeling a wide range of functions. Discussions about the best strategy in this data-driven age go hand in hand with evaluating one's business model and/or the necessity of developing it in a(n) (r)evolutionary way.

Markets, business strategies, and technologies evolve rapidly and in a volatile manner, thus requiring a solid strategic foundation, especially at the lower levels (levels 7–10), e.g., when it comes to implementing direct-to-consumer/omnichannel strategies. The majority of respondents (65%) are in favor of adopting an omnichannel approach similar to those used by *Adidas, Miele, Haribo,* and *Lego*.

From a business perspective, arguments for pursuing such a strategy include having a wider market coverage and being able to reach all types of customer segments at a lower cost and at the preferred point of interaction of each customer (**illustration 2**).

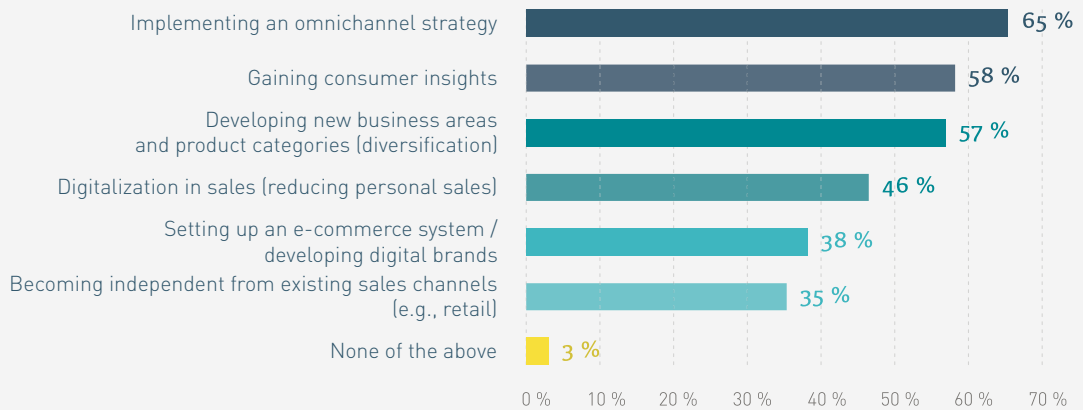|	
Implementing an omnichannel strategy	65 %
Gaining consumer insights	58 %
Developing new business areas and product categories (diversification)	57 %
Digitalization in sales (reducing personal sales)	46 %
Setting up an e-commerce system / developing digital brands	38 %
Becoming independent from existing sales channels (e.g., retail)	35 %
None of the above	3 %

Illustration 2: Primary overarching business goals for the next 2–3 years (in %, multiple answers, n=257)

It is no longer possible to rely on a single function to differentiate between individual customers and set yourself apart from competitors. This increasingly requires optimization across all disciplines and business units. Individual topics need to be addressed in distinct projects, but these projects need to conform and contribute to the overarching goal. The higher the service share in the relevant product/solution offering, the greater the focus on customer experience management – likewise, the risk arising from a possible failure of the transformation process is perceived to be greater (**illustration 3**).

For the majority of marketing managers and directors in Europe, expertise in the field of data-driven marketing and marketing tech still falls short of their self-declared standards – even in their own perception. This shows that there is an inherent contradiction between the importance of digital skills and one's own (actual) skills and/or the concrete implementation: On the one hand, ¾ of CMOs and marketing directors in Germany, Austria, and Switzerland state that their company has a strong awareness of the risks of a failed transformation process (74%). On the other hand, there is a considerable lack of resoluteness when it comes to implementing it, even in more advanced companies (44%). The interviews supplementing the study reveal that about 2/3 of companies sometimes perceive themselves to be "in a bottomless pit of tech despair" and/or "tangled up."

Awareness   **Resoluteness**

High awareness (74%)

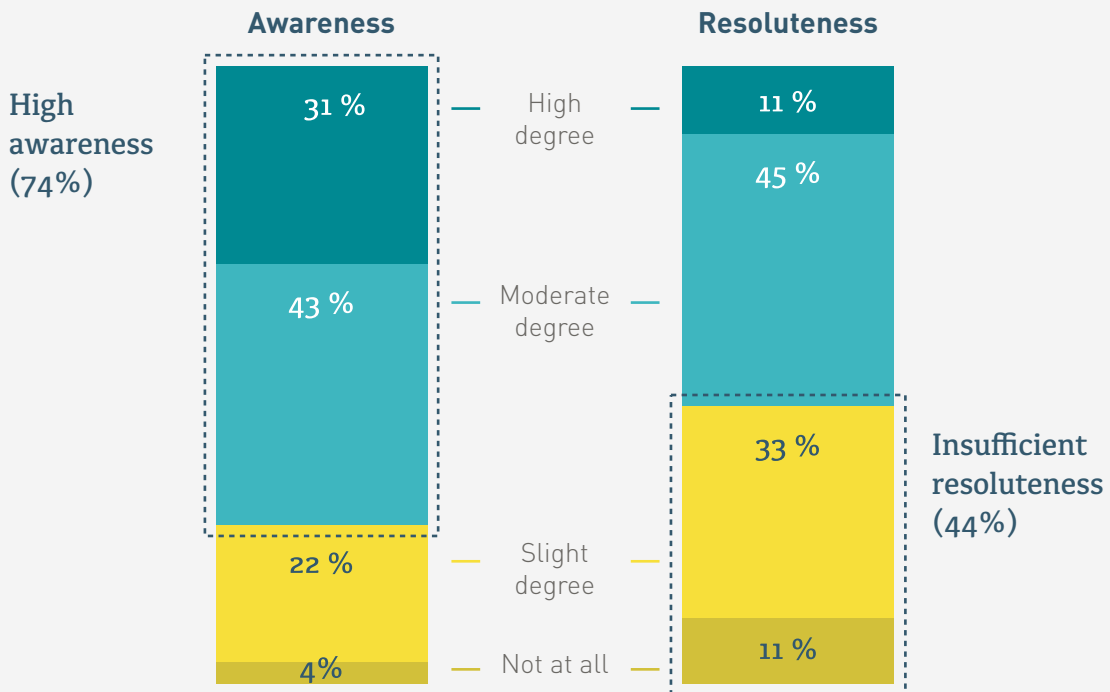| High degree | 31 % | 11 % |
Moderate degree	43 %	45 %
Slight degree	22 %	33 %
Not at all	4%	11 %

Insufficient resoluteness (44%)

Illustration 3: Awareness of the risks of a failed transformation process vs. resoluteness in implementing the necessary changes (in %, multiple answers, n=257)

While the vast majority still consider themselves sufficiently prepared from the point of view of corporate goals and legal challenges (83 %), the "island of bliss" is fading with regard to marketing and communication strategy, data or even technologies. The majority puts a question mark on the question of competences both in marketing as a whole and in sub-topics such as data and technologies.

4 IN GOD WE TRUST, ALL OTHERS HAVE TO BRING DATA … IS YOUR DATA READY?!

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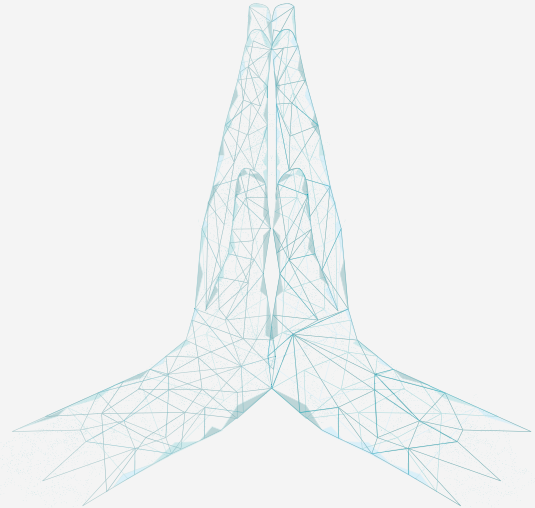
There may be many discussions about customer centricity, but when it comes to systematically collecting and using customer data, most companies are still at a rudimentary level. The cry for excellent data quality and the voices pointing out the need to lay the foundations for data-driven marketing often still go unheeded. Consequently, the top priority for the next 2–3 years will be to consolidate and harmonize user data (anonymous, personal), which will have a significant impact on the future existence of companies (**illustration 4**).

The "light side of the data force" needs to be mastered first before you continue to set up and expand other applications, such as loyalty programs.

Risk

Consolidating and harmonizing user data ●

Ensuring compliance with the regulatory framework (GDPR) ●

Establishing a cross-channel customer ID ●

Generating one's own user data ●

More control over one's own user data ●

Establishing a customer loyalty program ●

85 %
75 %
65 %
55 %
45 %
35 %
25 %
15 %
5 %
-5 %

0 %   10 %   20 %   30 %   40 %   50 %   60 %   70 %   80 %   **Goals**

Illustration 4:
Strategic prioritization matrix for goals in the field of customer centricity in the next 2–3 years and risks to the company's future existence and competitiveness in the case of a failure of the transformation process (in %, multiple answers, number of cases varies)

Data readiness, which involves the aggregation of data across multiple categories, thus amounts to only about 20%. Therefore, theoretical discussions about "data democratization," which are just a fig leaf, seem rather absurd.

⁵ CUSTOMER-DATA-PLATFORMS ... NO PARKING ON THE DANCEFLOOR?

//

The pervasive talk about aggregated data is leading to an increased demand for integration platforms in the form of CDPs. More than 57% of marketing decision-makers say they are either planning to introduce a CDP in the future or already in the process of selecting one (**illustration 5**).
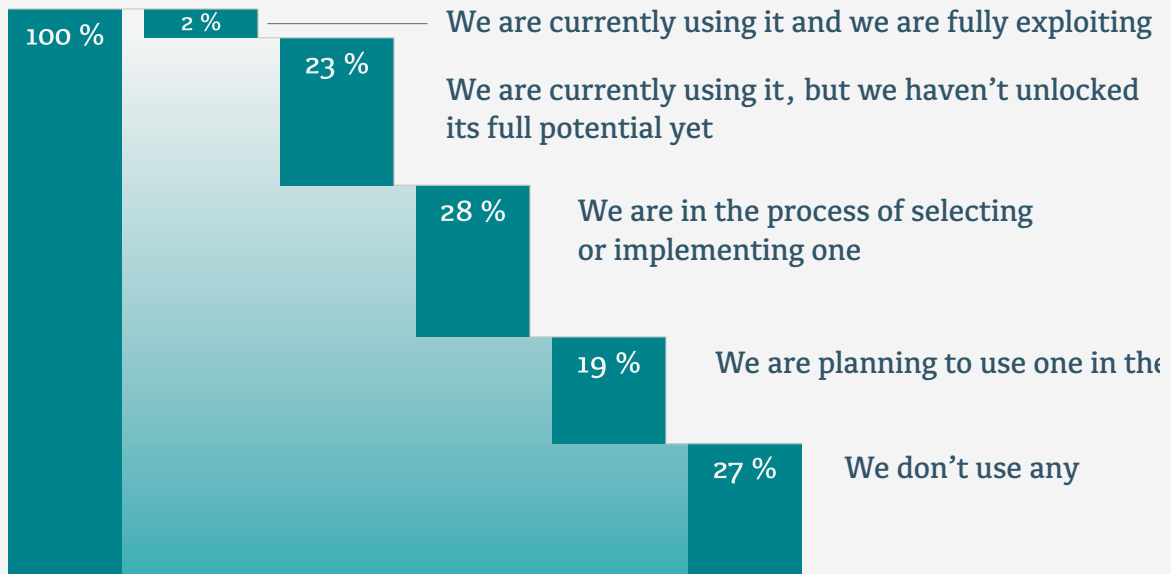
100 %	2 % — We are currently using it and we are fully exploiting
	23 % — We are currently using it, but we haven't unlocked its full potential yet
	28 % — We are in the process of selecting or implementing one
	19 % — We are planning to use one in the
	27 % — We don't use any

Illustration 5: Current CDP usage: CDPs that have already been implemented and plans for the future (in %, n=257) ///////////////////////////////////

The main differences between CDPs and DMPs are the mode of data collection and what type of data is collected. CDPs primarily work with personalized first-party data, which is aggregated as consistently as possible as PII and cookie information, compiling individual user profiles. The data is collected directly from the user, and various key identifiers (including both anonymous IDs and personal identifiers such as e-mail and postal addresses) are used for data synchronization. Cookie information is anonymized or pseudonymized in the process. DMPs are mainly cookie-based and primarily work with first- and third-party data.

⁶ ANYONE CAN DO IT THE EASY WAY … CHALLENGES RELATING TO MARKETING TECH STRATEGIES AND THEIR IMPLEMENTATION

It has often been critically noted in the interviews that the implementation of marketing tech requires internal know-how, e.g., in the field of possible IT integration scenarios, and necessitates developing your own **master construction** plan as well as clearly identifying technical requirements in order to be able to carry out a differentiated evaluation of different providers and platforms with regard to various application scenarios, including integration. Accordingly, the majority of marketing directors and CMOs single out the extensive and professional description of requirements and the discussion of detailed use cases as the centerpiece of a successful implementation of marketing tech (**42%; illustration 6**), which needs to be coordinated with a master construction plan (40%).

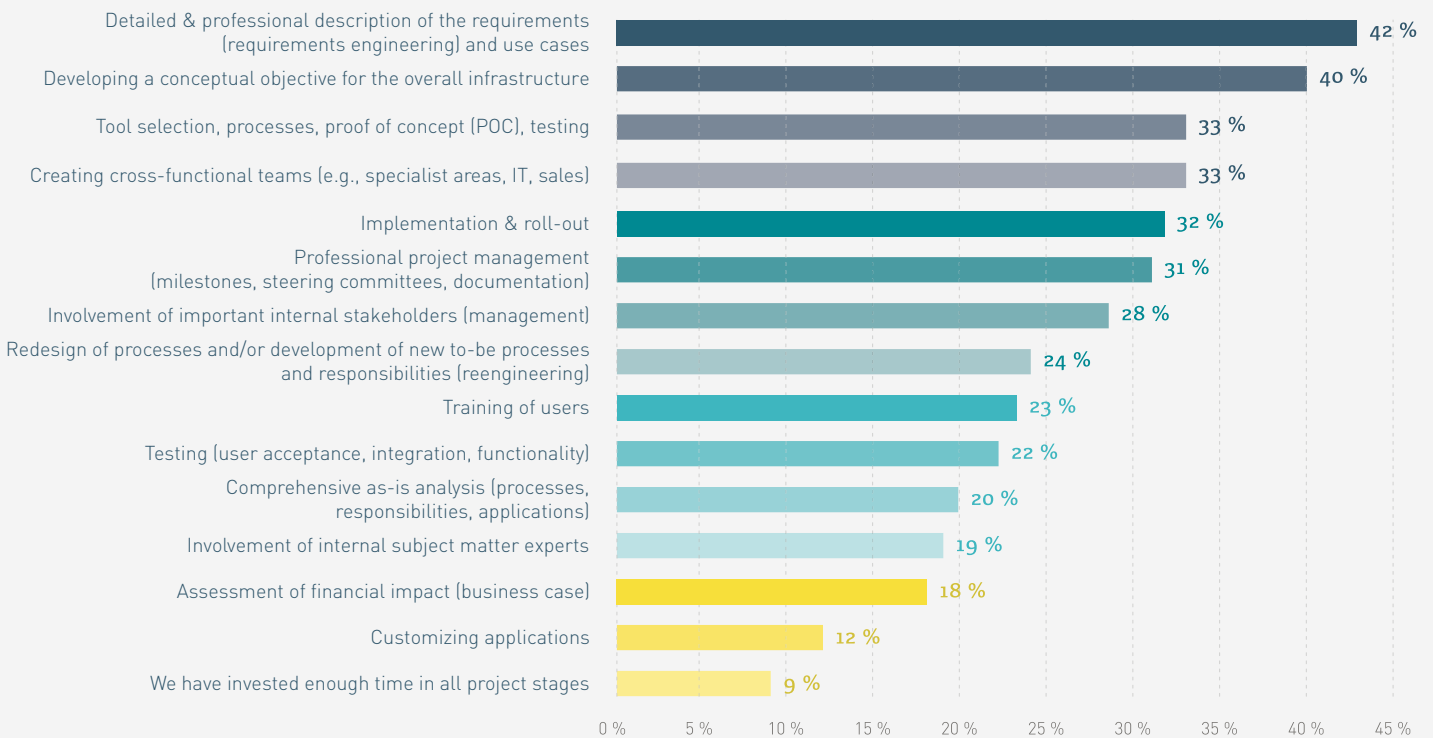| Topic	Percentage
Detailed & professional description of the requirements (requirements engineering) and use cases	42 %
Developing a conceptual objective for the overall infrastructure	40 %
Tool selection, processes, proof of concept (POC), testing	33 %
Creating cross-functional teams (e.g., specialist areas, IT, sales)	33 %
Implementation & roll-out	32 %
Professional project management (milestones, steering committees, documentation)	31 %
Involvement of important internal stakeholders (management)	28 %
Redesign of processes and/or development of new to-be processes and responsibilities (reengineering)	24 %
Training of users	23 %
Testing (user acceptance, integration, functionality)	22 %
Comprehensive as-is analysis (processes, responsibilities, applications)	20 %
Involvement of internal subject matter experts	19 %
Assessment of financial impact (business case)	18 %
Customizing applications	12 %
We have invested enough time in all project stages	9 %

Illustration 6: Topics regarding marketing tech projects that, in retrospect, companies should have invested more time in (in %, multiple answers, n=257)

Overall, only 9% of marketing managers say they have invested enough time in all project stages and fields of action. From the very beginning, there is thus often a lack of a conceptual, content-related basis.

⁷ ONLY ENDEAVOR IT IF YOU MEASURE IT ... FROM STRATEGY TO GOALS TO KPIS

The accompanying interviews and insights gained from project experience show that companies often only have insufficient control procedures for their marketing efforts. Accordingly, the majority of companies (55%) admit to shortcomings regarding a KPI framework for measuring and managing all activities in terms of measurable business objectives, which are derived from the company's strategic goals and include clear causality when it comes to investment. Only 13% of companies boast such a clear and thorough approach (**illustration 7**).
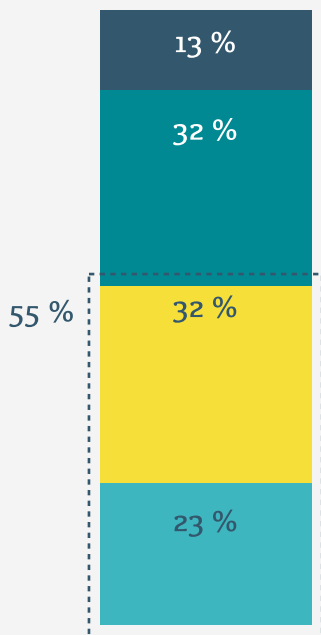
13 %	**Our operational management indicators have been derived directly from our strategic goals**
32 %	**We know our marketing performance indicators rather well**
55 % **32 %**	**We don't know our marketing performance indicators that well**
23 %	**We have a poor, inconsistent set of marketing KPIs that won't be able to withstand future challenges**

Illustration 7: Usage and implementation of marketing goals and KPI frameworks (in %, n=257)

From "having the will" to "having the skills" to "taking action": Individual data sources can be easily identified and visualized, and a large percentage of companies is familiar with the various steps of data processing. The picture is much bleaker, however, when it comes to "having the skills." The majority of companies have little knowledge about processing, deriving strategies from data, or even comparatively simple application scenarios (e.g., web analytics). For most companies, the "Master Yoda" of their own data can be found at an external agency – and, mostly, no clear legal and/or contractual agreements have been made pertaining to future insourcing of this data.

8 MASTER YODA IS BACK ... THE REVIVAL OF MARKETING PLANNING AND MANAGEMENT

///

Nearly 55% of companies state that they are already using an application; in only 8% of cases, however, this application can remain unchanged in the foreseeable future. This is consistent with the statements made in the Marketing Tech Monitor 2020. 15% of companies are already looking for newer and more modern solutions, which is why there are likely to be many tendering procedures and pitches over the next few years (**illustration 8**). The accompanying interviews show that

» simple calendar functions in reporting or BI tools are sometimes already interpreted as MRM;

» the term "MRM" and the application scenarios encompassed by it are not clear and self-explanatory – even the majority of marketing directors working in the field of consumer goods say that they cannot really explain which application scenarios are actually covered by the term "marketing resource management";

» the management of budgets allocated to the cost center ERP FI/CO is used as a synonym for MRM.

100 %   8 %   47 %

We are currently using it and we are fully exploiting its potential

We are currently using it, but we haven't unlocked its full potential yet

15 %

We are in the process of selecting or implementing it

11 %   We are planning to use it in the future

19 %   We don't use it
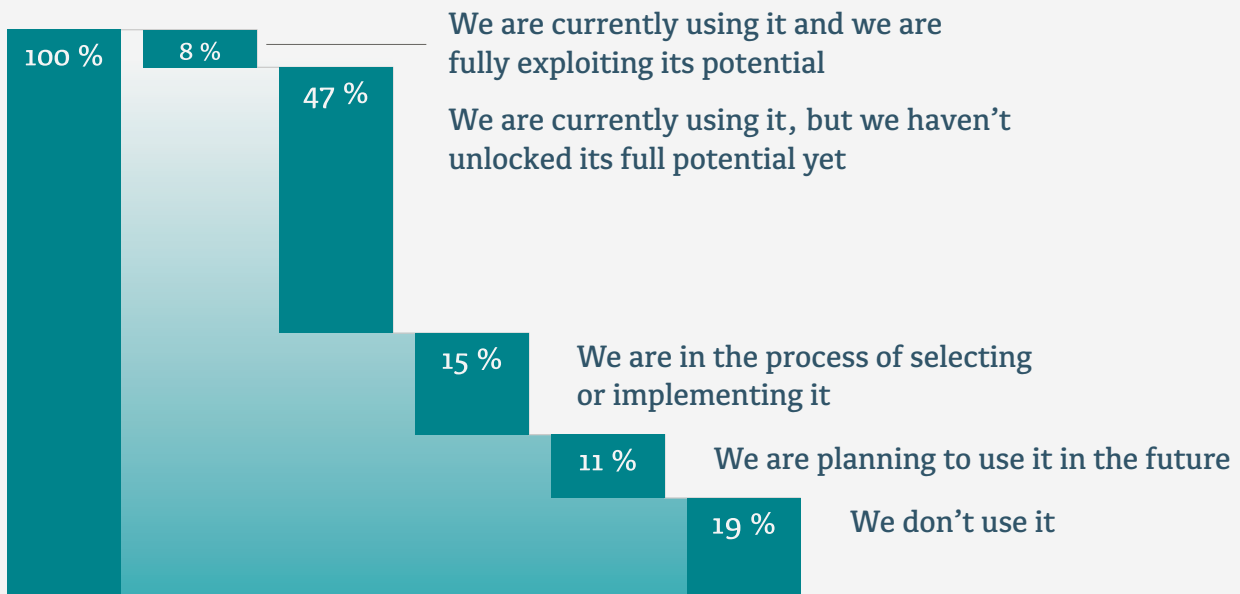
Illustration 8: Current MRM usage: MRM that has already been implemented and plans for the future (in %, n=257)   ///////////////////////////////

⁹ I GO WHERE TRUE LOVE GOES … BUDGETS IN MARKETING TECH

A comparison of the budget share allocated to marketing tech (the share of technology and system costs in the marketing budget) reveals that for 82% of companies, spending on marketing tech still accounts for less than 10% of the total marketing budget. For most companies, the current share amounts to 6–8%, and the majority of companies (21%) expect the share of technology and system costs in the total marketing budget to increase to at least 15–20% in the next 2–3 years (**illustration 9**). 44% expect the share to increase to more than 20%.

Almost one in four companies believes that it could even amount to more than 25%. High levels of investment are predominantly expected by B2B and, generally speaking, larger companies: Most companies with a budget of more than €50 million predict that technology and system investment will increase to 20–25%. In the United States, the UK, Norway, and Denmark, for example, the average share in the marketing budget amounts to up to 26%. This cross-country comparison shows that there is still considerable room for improvement in Germany, Austria, and Switzerland.

As far as the future development in their own company is concerned, the majority feels extremely confident, with 29% of companies expecting the share to increase to 15–20%. Accordingly, respondents were very self-critical when asked about whether they were already investing enough in marketing tech – the overwhelming majority (68%) thinks that it is important and necessary to invest significantly more in this area.

Pie chart values: 5 %, 11 %, 19 %, 21 %, 20 %, 8 %, 5 %, 4 %, 8 %

Legend:
- Less than 5%
- 5% to less than 10%
- 10% to less than 15%
- 15% to less than 20%
- 20% to less than 25%
- 25% to less than 30%
- 30% to less than 50%
- 50% and more
- Don't know

Illustration 9:
Expected share of technology and system costs in the total marketing budget across the entire market by 2023 to 2024 (n=257)

10 TREPIDATION AND HOPE ... MARKETING ANALYTICS AND SPEND OPTIMIZATION

The explosion of touchpoints, hyper-fragmented media investment, the increasing means of processing large amounts of data in real time, and analysis automation are resulting in a revival of marketing spend optimization, which used to be such a lengthy and cumbersome process. By the time you got your results, the optimization ship had sailed and all strategic decisions had already been made. While digital-only attribution has been gaining ground in recent years, integrated models (a UMIA approach) are the talk of the town now because they allow you to also attribute offline investment and/or measure external effects. Statistical methods go hand in hand with a mostly game-theoretic analysis of individual customer journeys. Due to the approaching end of the cookie era as a result of the planned ePrivacy directive, the blocking of third-party cookies on Safari and Firefox, and, in the future, on Chrome, as well

as the walled-garden strategy when it comes to data measurement and/or blind spots, the plug is slowly being pulled on multi-touch attribution. In marketing mix models, however, individual customer journeys have never played a role. They aim to open up the black box of consumer decisions through (aggregated) statistical regression analyses, which can be generalized and reveal intersecting similarities. Combined models based on statistical methods and cohort analyses of digital real-time data are the solution.
As a matter of fact, barely ¼ of marketing professionals are currently developing their own marketing optimization models. The aim is to have more control over performance data and to get a better marketing ROI, while keeping risks to a minimum (**illustration 10**).

Risk

Optimization through machine learning and AI by processing large amounts of data (the limits of statistics)

Evaluation capabilities independent of external service providers

More control over one's own performance data

Getting a better marketing ROI

International consistency

Using one's own optimization models

85 %
75 %
65 %
55 %
45 %
35 %
25 %
15 %
5 %
-5 %

0 % 10 % 20 % 30 % 40 % 50 % 60 % 70 % 80 %

Goals

Illustration 10: Strategic prioritization matrix for goals in the field of media strategy in the next 2–3 years and risks to the company's future existence and competitiveness in the case of a failure of the transformation process (in %, multiple answers, number of cases varies)

From a strategic point of view, marketing analytics will be at the core of the further development of marketing tech until marketing spend optimization will reach a more advanced level (in conjunction with predictive analytics and, in the future, artificial intelligence).

11 PROGRAMMATIC ADVERTISING, GOING CRM?!

//

In the opinion of the majority of companies, the programmatic trend has (inevitably) reached almost every channel, even TV, a giant of the analog world, and podcasts. According to a forecast by the Circle of Online Marketers (OVK), display advertising revenue will increase to €4.5 billion by 2021, which would be equivalent to an increase of 9.7%, despite the COVID-19 pandemic.[1] The German Association for the Digital Economy (BVDW) reports that the share of programmatic advertising in total display advertising already amounts to about 70%, whereas traditional insertion orders / advertising space bookings are stagnating. Instead of focusing on intelligent context- and interest-based target groups, ad bookings are still rather oriented toward more simple, demographic segments. In other words, even though the use of programmatic advertising is largely a given, companies have hardly begun to tap its potential.
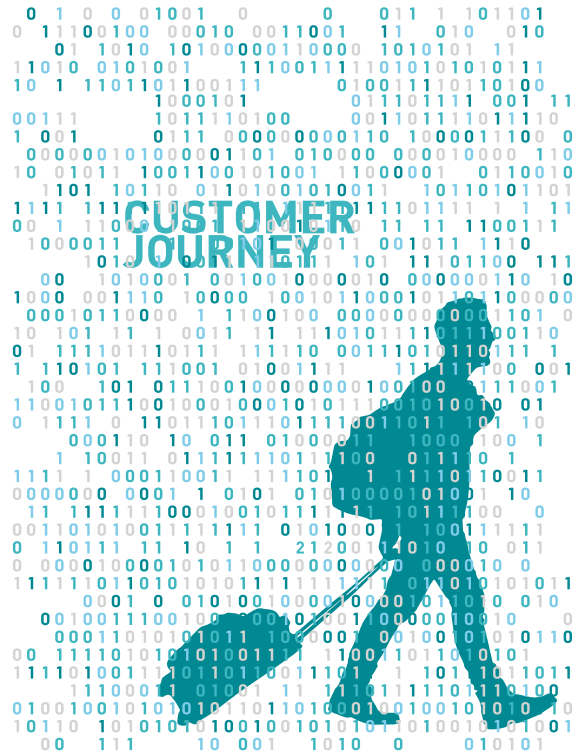
12 ORGANIZATION REMAINS A DIGITAL WORK IN PROGRESS … THE COMPETENCY GAP

//

As in previous years, and undoubtedly the following years, organization capacity is receiving a great deal of attention. Developing new skills is the top-of-mind objective for companies (71%), followed by establishing end-to-end processes in the field of marketing operations in order to engage with customers efficiently (57%). The second objective is also associated with the highest risk (64%).

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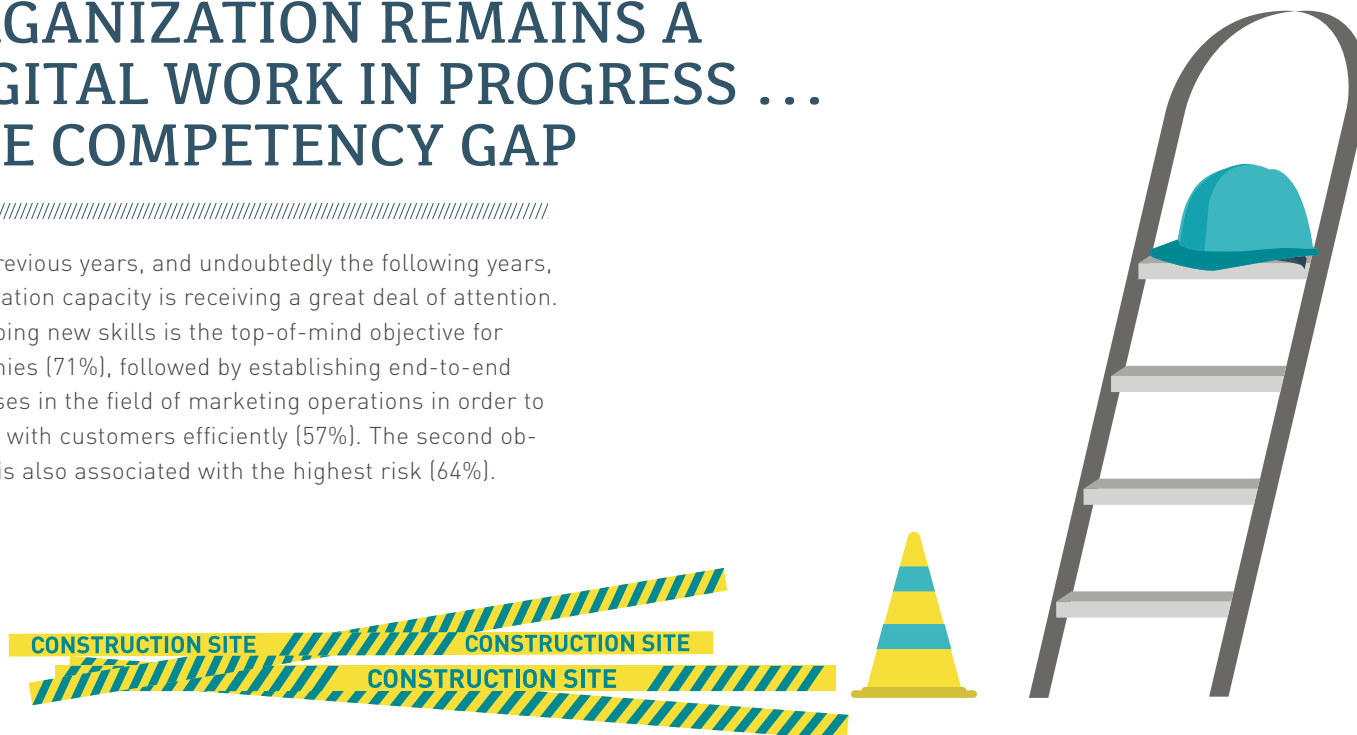
1   Schobelt, F.: Prognose: Digitaler Werbemarkt wächst 2021 um 9,7 Prozent, in: One-to-One, 3.11.2021

¹³ CHANGE MANAGEMENT … COLORED SLIPS OF PAPER, QUICK FAILURE?

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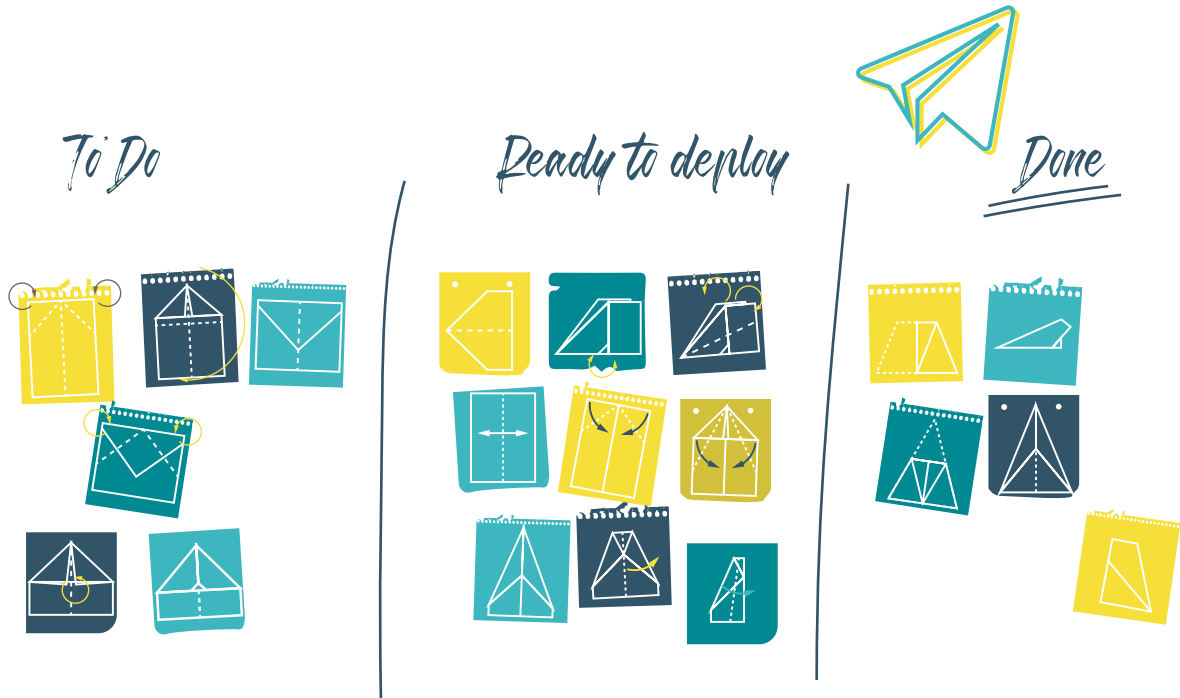
In most organizations, the transformation process toward data-driven marketing is highly variable and can be divided into several stages: In the first phase, introductory information about the upcoming changes is provided, which causes a feeling of shock. After a phase of denial, understanding sets in slowly, and finally new structures and processes are accepted. Companies should develop a tailored and comprehensive change management approach, accompanying the changes by different tools and mechanisms that are suitable for the respective phase. Insufficient change management, or a lack thereof, is one of the main reasons why projects aimed at setting up data-driven marketing and marketing tech fail. It is not about creating an atmospheric buzz by sticking Post-it notes to flip charts in an agile manner, it is about firmly establishing new structures, processes, and systems in an organization and also learning from one's mistakes.[2] The more a company analyzes the challenges on the way to implementing data-driven marketing on a conceptual, content-related level, the more it will emphasize the need for active change management. *Lego Serious Play (LSP)* is a method that lends itself to being used for projects related to setting up and expanding data-driven marketing or marketing tech. It is one of the few strategic management methods that opens up the so-called "problem space," presents alternative solutions, and focuses on possible solutions ("solution space"), while also creating a psychologically safe environment.

2   Hofert, S.; Thonet, C.: Der agile Kulturwandel: 33 Lösungen für Veränderungen in Organisationen, Wiesbaden 2019.

¹⁴ AUTHORS

//

Ralf Strauß is Managing Partner of Customer Excellence GmbH (a consulting company specialized in marketing, sales, service, and digitalization), Managing Partner of CMO Academy GmbH, initiator of the CMO Community (founded in 2006, www.cmocommunity.de), initiator of the Digital CMO Community (founded in 2015, www.digitalcmocommunity.de), Managing Partner of Marketing Tech Lab, a member of the Advisory Board of MAI Marketing Automation Intelligence GmbH, President of the German Marketing Association (DMV), and Chairman of the Board of the European Marketing Confederation (EMC).

Kerstin Clessienne has been advising companies on digital transformation since 2000, most recently as CDO and Group Director at a leading international agency. Her clients include Telefónica, General Motors, Microsoft, Intel, ABInbev, L'Oréal, and MasterCard. She has been working as a freelance consultant for Marketing Tech Lab GmbH since 2017 (a consulting company specialized in marketing, sales, service, and digitalization), acting as a "sparring partner" in the field of marketing technology, marketing automation, and programmatic purchasing management.

Kerstin Pape has been Managing Director at Marketing Tech Lab and Customer Excellence GmbH since 2021. A digital expert since 2005, she has 20 years of management experience, including, most recently, 10 years of VP-level experience. She has held three different leading positions in the fields of e-commerce, online banking, and telecommunications, working for OTTO (otto.de, 12 years), comdirect bank (5 years), and telecommunications company Freenet (2 years).

INDIVIDUAL MARKET RESEARCH AND ALSO EXTERNAL DATA MODELING

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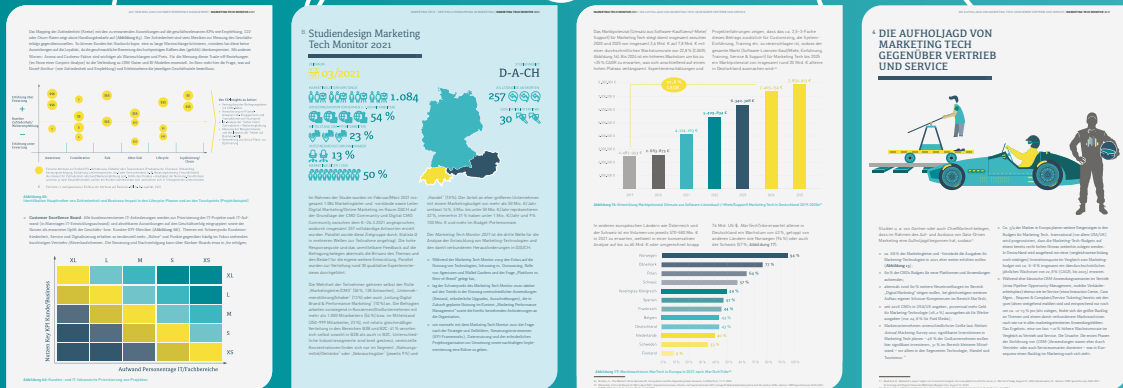
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