Portada Insights Report

Survey: What Brand Marketers Need from MarTech in 2021 and Beyond!

Sponsored by

MOXTRA

Teads

Contents

1. Overview

Fortune 1000 investment in [marketing technologies](#) on average has amounted to 30% of overall marketing budgets in the U.S.over the last years and this ratio is set to grow even more in coming years. A January 2021 CMO Council report states that while 66% of the brands surveyed anticipate growth in overall marketing expenditure, 70% are allocating more dollars to technology. This Portada Insights report "What Brand Marketers Need from MarTech in 2021 and Beyond" includes the aggregated results of brand marketers preferences in MarTech investment categories over the next 18 months. 200 brand marketers in the Portada network were polled. The survey took place in December 2020 and January 2021.
The report also includes qualitative statements of brand marketers interviewed by Portada as well as advice and best practices from a select group of marketing service providers. Below are the key results of the report:

- **The share of brands who chose the Customer Experience MarTech category as their main area of investment over the next 18 months grew by more than 150% compared to our 2020 survey. This increase is related to the acceleration of digitization and e-commerce propelled by the COVID-19 pandemic.**

- **Regionally, the increase of the expected investment in MarTech related to Customer Experience is more pronounced in Latin America compared to the U.S.**

- **Advertising & Promotion continues to be the leading category in the U.S. and is the second one in Latin America. The advent of Internet privacy regulations has increased the need of brands to invest in technologies that foster first-party data capture-maintenance and analysis as well as in technologies that are viable in a cookieless world including contextual targeting.**

2. Main MarTech Expenditure Types per Category in the Survey

1.Advertising & Promotion
Including: Addressable TV, Digital Audio, Digital: Content Discovery, Display and Programmatic Advertising, EMail Marketing, Geolocation, Influencer Marketing, Native Content, Paid Social, SEM, Video

2. Customer Experience
Including: Apps, Bots & Lifechat, Emerging Platforms/Chatbots, Use of AI for Experience Design, Optimization & Personalization & Testing, Voice Activated Marketing

3. Social & Relationships
Including: CRM, Channel Partner & Local Marketing, E-Commerce Marketing, Marketing Automation & Campaign Lead Management

4.Commerce & Sales
Including: Social Media Management, Social Monitoring & Listening, Community & Reviews

5. Data
Including: Audience Marketing & Data Enhancement Business, Customer Intelligence & Data Science, Cloud/Data Integration & Tag Management, Data Intelligence, Marketing Analytics & Performance & Attribution

3. BRANDS CHOSE THE FOLLOWING CATEGORIES AS THEIR PRIORITY FOR MARTECH INVESTMENTS

Categories	2020	2021
Advertising & Promotion	56.76%	36.00%
Customer Experience	10.81%	26.67%
Social & Relationships	13.51%	12.00%
Commerce & Sales	10.81%	13.33%
Data	8.11%	12.00%
TOTAL	100%	100%

While Advertising & Promotion is still the number one MarTech investment category for 2021 and beyond, the big news is that Customer Experience jumped to the second most chosen category.

NOTE: Brand marketers were asked which one (1) of the 5 categories they will be investing in the most over the next 18 months.

3.1. COVID-19 and Privacy Regulation Propel Growth in CX and Data

% of respondents who chose the category as their first MarTech investment option.

Legend: ■ 2020 ■ 2021

Category	Value
Advertising & Promotion	-37%
Customer Experience	147%
Social & Relationships	-11%
Commerce & Sales	23%
Data	48%

Y-axis: 60.00%, 40.00%, 20.00%, 0.00%

X-axis label: Categories

The share of respondents who chose **Customer Experience (CX)** as their most important MarTech investment category grew by almost 150% **as consumer digital interactions accelerated significantly due to the COVID - 19 pandemic.** Customer Experience includes the subcategories Optimization & Testing, Use of AI for Experience Design, Apps and Emerging platforms (e.g. chatbots). The share of the **Data Category** grew by 48% in large part due to the **need of brands to focus on first-party data because of upcoming changes in digital privacy regulations.**

3.2. Geographical Breakdown: United States

Categories	US 2020	US 2021
Advertising & Promotion	41.18%	40.91%
Customer Experience	11.76%	20.45%
Social & Relationships	23.53%	13.64%
Commerce & Sales	11.76%	11.36%
Data	11.76%	13.64%
TOTAL	100%	100%

In the U.S. investment in marketing technologies related to Advertising & Promotions held up better in 2021 than in Latin America where the growth of customer experience is even larger than in the U.S. (see page 8 below). Social & Relationships declined at the expense of CX, while Data grew.

3.3 Geographical Breakdown: Latin America

Categories	2020	2021
Advertising & Promotion	45.45%	31.25%
Customer Experience	18.18%	34.38%
Social & Relationships	9.09%	9.38%
Commerce & Sales	18.18%	15.63%
Data	9.09%	9.38%
TOTAL	100%	100%

Many Latin American companies are planning substantial investments in Customer Experience related technologies. An acceleration in digital and e-commerce habits by Latin American consumers makes CX investments imperative.

portada

portada ▶

3.4 Advertising & Promotion Subcategories 2020/2021 Evolution

Advertising and Promotion 2020-2021

■ 2020 ■ 2021

Chart y-axis: 30.00%, 20.00%, 10.00%, 0.00%

Values shown above bars:
- Display and Programmatic Advertising: 43%
- Paid Social: 122%
- Addressable TV,: -41%
- Influencer Marketing: -11%
- Digital: Content Discovery,: 18%
- Geolocation: 18%
- E-Mail Marketing: 18%
- Digital Audio: -70%
- Native Content: -100%
- SEM: 3%
- Video: -9%

Subcategories (x-axis): Display and Programmatic Advertising, Paid Social, Addressable TV,, Influencer Marketing, Digital: Content Discovery,, Geolocation, E-Mail Marketing, Digital Audio, Native Content, SEM, Video

Subcategories

A significant increase for Display and Programmatic and Paid Social can be appreciated in 2021. Both sub-categories were propelled by an increase in E-Commerce related advertising as well as an overall effort of brands to increase their amount of first party data. The increase of Display and Programatic is also the result of augmented investment in ad-technologies that are compliant with rnew privacy laws, including contextual targeting technologies.

NOTE: Brand marketers were asked which two (2) subcategories within their top chosen MarTech category they will be investing in the most.

3.4.1 Brand Marketer Input:
NEED FOR FIRST PARTY DATA IS FRONT AND CENTER

"To acquire first party data in order to assess attribution models is one of our key priorities."

Rajaa Grar,
Chief Digital Officer
Nutrabolt

"We are investing in Marketing Technologies that help us increase engagement, reach and frequency to acquire data in order to build our first party dataset."

Ivonne Kinser,
Head of Digital Marketing & Ecommerce
Avocados from Mexico

Brand Marketer Input:
FIRST PARTY DATA AND CRM-CDP DEMAND

Javier Meza,
SVP Marketing for Latin America
Coca Cola

"To capture, maintain and leverage first-party data through Customer Data Platforms is a pillar of our marketing efforts. We obtain first-party data through our owned digital platforms, like the Coke Studio globally and Wabi in Latin America."

"We get a lot of help from our MarTech partners. For instance, we have providers who help us determine if the content around which we want to advertise our products is brand safe. Another marketing technology we derive benefits from are Customer Data Platforms, CDPs, which provide tools that shed light on the consumer journey."

German Villegas,
Digital E-Commerce Manager,
Colgate Palmolive Mexico

3.4.2 Ad-Tech and Data Solutions for Brand Marketers
3.4.2.1 Best Practices to Obtain First Party Data

Rémi Cackel
Chief Data Officer
Teads

Question: What technologies do you recommend brand marketers for the acquisition of first party data and why?

We recommend brands to work with partners that can offer at least four key functionalities:

1. Process to data collection beyond 3rd-party cookie
- Offer a proper login management system to tie most of the online activities to a login (unique ID).
- When the users are not logged-in, the online activities should be technically captured based on your 1st-party cookie.

2. Ensure cookieless actionability
- When logged-in data offers by design a cookieless actionability, your 1st-party cookies cannot be technically used outside of your digital property.
- So you should expect your partner to provide you with insights capabilities to translate your 1st-party cookies into cookieless signals (sort of cookieless lookalike capabilities).

3. Propose a connectivity with all relevant media partners
- Your segment or cookieless activation strategy should be easily integrated with your media activation partner of your choice (e.g: your DSP)

4. Ensure proper legal and privacy management
- Depending on the markets where you operate, you will also need to ensure proper legal coverage.
- This can take multiple forms - from using a CMP (consent management platform) in EEA to managing specific data requests (e.g: deletion, access) under CCPA in California.

3.4.2 Ad-Tech and Data Solutions for Brand Marketers
3.4.2.2 Using Contextual Content for Personalization

Rémi Cackel
Chief Data Officer
Teads

- Contextual Targeting allows advertisers to **control the content of the page where the ad is displayed.** It seems simple, but it's all about controlling the execution steps and getting the basics right.

- First of all on the technical side, there are different solutions in the marketplace. At Teads we developed **our proprietary semantic analysis algorithms to analyze** in real-time the content of each article from our premium editorial publishers. This analysis allows us to classify the page according to our catalogue of 500+ topics.

- Then on the commercial side, the main reason for using contextual targeting is **to provide greater media effectiveness.** The content you read puts you in a specific mindset and proper contextual targeting allows you to target users at their highest moments of receptivity to better consider your product or service.

- But it's all about executing it properly. For example: Let's say **we are promoting a professional camera,** our intuitive pick would be a "Photography" contextual channel, however, if we think further we could potentially also show this ad on content related to "weddings" "Safari" and "Honey Moon". These additional alternatives allow for higher product suitability and if the creatives are tailored to each Context the message will have a greater impact on the exposer users.

- To go one step further, you c**an indeed personalize the creative to make your marketing message resonate even more.** Using the same example, your camera creative could be tailored to add a message such as 'Immortalize your unique lifetime moments' for a greater impact.

- We have been validating this best-in-class approach with top clients across industry verticals and markets. We have been observing an **average brand uplift of 2X compared to traditional targeting approaches.**

Simply put contextual targeting **can double your ROI** when properly using the right solution.

Teads
www.teads.com

portada ▶
• LIVE

Exclusive Brand Decision Maker Virtual Workshop and Interactive Networking

March 24, 2021

200+	1	150+	1	2
1.1 MEETINGS	COLLABORATIVE KNOWLEDGE-SHARING SESSION	DECISION MAKERS	RESEARCH SPOTLIGHT	BRAND CHALLENGES

A deep dive into topics including:

- - Taking New Lessons into a Post-Covid World **// Speakers**: **Rene Ramos**, Constellation Brands/ **Joanne Coleman**, Constellation Brands

- - Brand Marketer Challenge: Driving E-Commerce and Digital Revenue Growth **// Speakers**: **Rajaa Grar**, Nutrabolt / **Moises Leiferman,** Perfetti Van Mele, **Emily Jordan**, Wilson Innovations

- - Understanding the New Latin American consumer journey map (tbc) **// Speakers: Camilo Reina**, Grupo Exito / **Roberto Ramirez**, MasterCard, **Carlos Leal,** Nestlé Colombia

- - Collaborative Knowledge-Sharing Session: How to target U.S. Multicultural Consumers at Scale **// Speakers: Mehreen Hussain**, Target / **Alexis Kerr**, The Mahogany Brand, Hallmark Cards
https://www.portada-online.com/events/portadalive2021/

Already confirmed Partners

ACQUIA   CNN   d:digo   MOXTRA   McKee Wallwork +Co.   shyft.   sw:tch   theGrovery   seedtag   NGL Collective
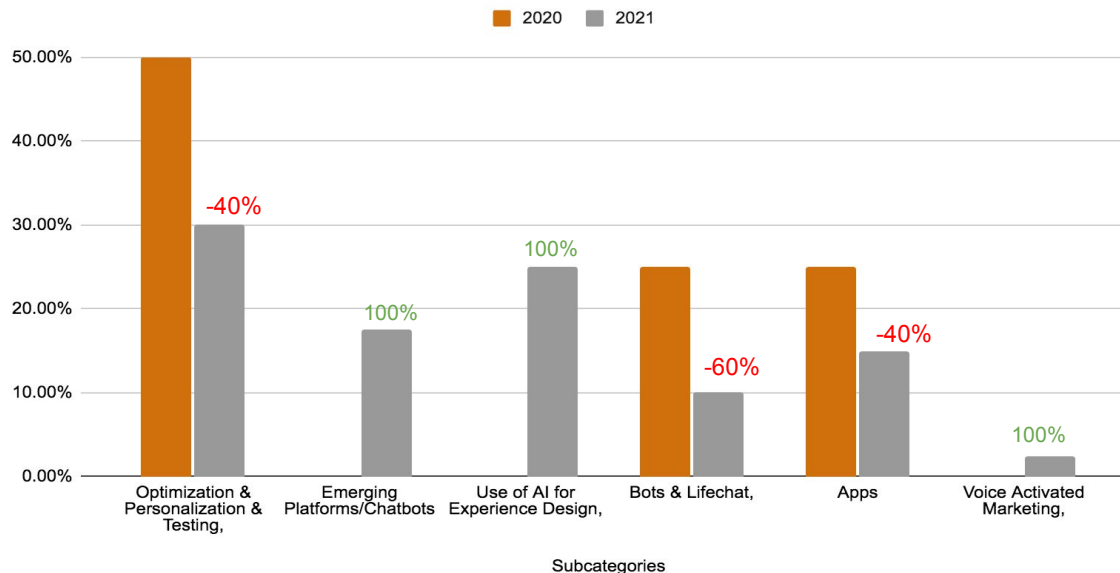
For partnership opportunities including 1:1 meetings with brand decision makers, please contact VP of Sales David Karp to David@portada-online.com

portada LIVE   *March 24, 2021*

3.5 Customer Experience Subcategories Evolution

Customer Experience 2020-2021

Legend: ■ 2020   ■ 2021

Chart values (percentages above 2021 bars):
- Optimization & Personalization & Testing: -40%
- Emerging Platforms/Chatbots: 100%
- Use of AI for Experience Design: 100%
- Bots & Lifechat: -60%
- Apps: -40%
- Voice Activated Marketing: 100%

Y-axis: 0.00%, 10.00%, 20.00%, 30.00%, 40.00%, 50.00%

X-axis label: Subcategories

X-axis categories: Optimization & Personalization & Testing, Emerging Platforms/Chatbots, Use of AI for Experience Design, Bots & Lifechat, Apps, Voice Activated Marketing

Optimization, Personalization and Testing and use of AI in Experience Design drive the overall strong increase of expected investment in MarTech related to Customer Experience.

NOTE: Brand marketers were asked which two (2) subcategories within their top chosen MarTech category they will be investing in the most.

3.5.1. Brand Marketer Input:
TECH AND AI ARE RESHAPING CX

Ethel Gonzalez
CBG eCommerce
Channel Marketing
3M

"A major area of investment in MarTech are our digital catalogs, where application programming interfaces, API's, provide an interface for our product catalog. Consumer-facing content is continuously updated through this technology. This includes pricing, availability, specifications, descriptions, and images for all products."

TRUIST

Truist Bank is spending $1.8 billion on tech, customer service upgrades. Those investments include the creation of new delivery systems for commercial loans and mortgages, with executives making the argument that the upgrades will create better client experiences and will lead to more loan applications. (Source American Banker, January 2021)

Kroger

From machine learning to data mining, AI is proving to be an unstoppable force in food retail. During a session on redefining AI strategy, Milen Mahadevan, president of Kroger-owned data company 84.51°, said advanced AI systems allow companies to connect the dots between what's happening in the business, why it's happening and using data gleaned to create actions that help make the customer experience as seamless as possible. (Source: Smartbrief, February 1, 2021)

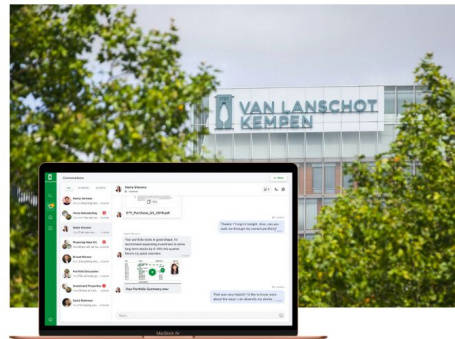## 3.5.2 Customer Experience Solution for Brand Marketers

3.5.2.1 Powering an App for the Oldest Private Bank in the Netherlands

THE VAN LANSCHOT APP, POWERED BY MOXTRA

Van Lanschot's partnership with Moxtra was a natural fit, given the bank's focus on delivering white glove service. Using Moxtra's platform to power their branded OneStop experience, Van Lanschot's service changed overnight: their first class service evolved from relationship managers driving to a client's home to hand-deliver portfolio printouts, to clients being able to access their portfolio, their relationship manager, and their interaction records, all from the convenience of their pockets. Clients now have access to real time updates, secure messaging, and a transparent view of their entire wealth management on a digital portal - all while keeping a documented record of their banking transactions.

ABOUT VAN LANSCHOT

Van Lanschot is a Dutch financial institution offering private banking and asset management services. As the oldest private bank in the Netherlands, Van Lanschot has been constantly evolving its practices to stay relevant and provide exceptional service since 1737. Adjusting to meet its client's expectations in each new era, Van Lanschot has maintained its reputation for delivering personalized client attention, while increasing its global reach.

moxtra.com

3.5.2.1 Powering an App for the Oldest Private Bank in the Netherlands

MOXTRA

THE MANAGEMENT EXPERIENCE

With the Moxtra-powered management portal, Van Lanschot maintains a comprehensive overview of all client-relationship manager interactions and an auditable ePaper trail - creating a complete client profile and history, for persistence through RM transition. This compliant data retention and auditing system preserves a seamless banking relationship on digital. The commitment of excellence Van Lanschot has promised to each client for over 250 years is the secret to their continued success.

Client Experience:
• Convenience of one secure digital destination for all business interactions
• Access portfolios, documentation, and RMs from anywhere, at anytime
• Document collaboration and approvals in real-time over digital channels

Relationship Manager Experience:

• Stronger relationship with client that continues virtually
• Status updates to signal availability and receive urgent notifications when necessary
• Recorded transcripts of conversations with clients and organized communications portal to easily reference previous business interactions

Management Experience:

• Maintained records of client-relationship manager interactions for involved collaboration and persistence through transition
• Continuous workflows with tailored permissions mirroring organizational structure on digital
• Brand relevance and resilience with client loyalty over branded OneStop Experience

portada ▶

For the latest news and insights on how brand marketers best leverage MarTech and more...

Subscribe to our E-letters!

Follow us!

f @portada

🅾 @portadaonline

🐦 @portada_online

in portada

www.portada-online.com

mercadotecnia.portada-online.com