Marketing Data Proliferation Report

January, 2021

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Research & Dataset Updates

October 2020

Companies Tracked: 3108

NASDAQ & NYSE Coverage: ~ 10%

Marketing Technology Indexed: 1,240

January 2021

Companies Tracked: 7113 (+4,005) (+129%)

NASDAQ & NYSE Coverage: ~ 100% (+2K)

MarTech Indexed: 2,350 (+1,110) (+89%)

Bonsai research doubled depth & breadth, and now measures **most publicly traded US companies**

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48% Companies _decreased_ 3P tracking vs. Oct

More
1,050

Less
1434

Companies

507

Same
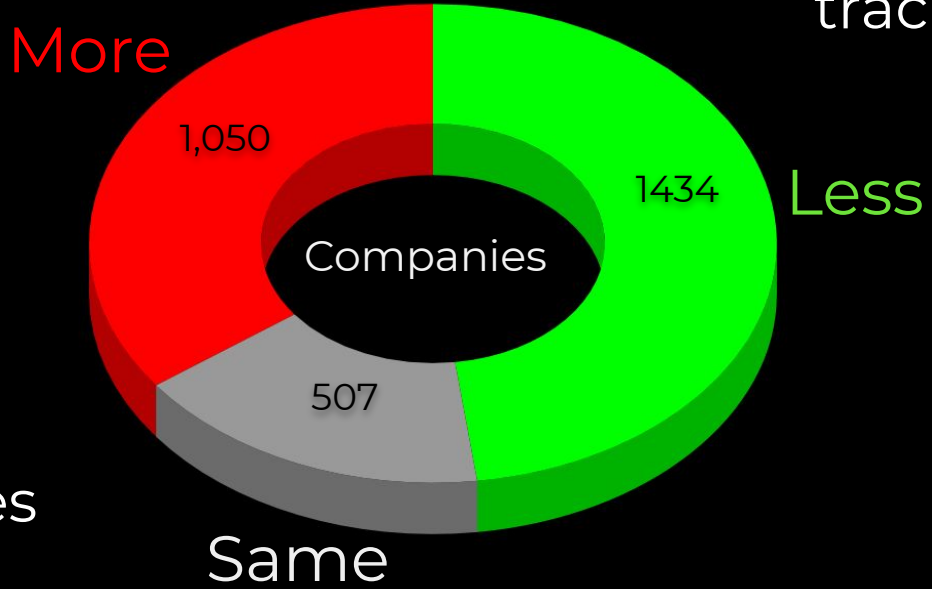
52% Companies _increased or maintained_ 3P Tracking vs. Oct

*Includes only the companies Bonsai measured since July 2020

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Marketing Data Proliferation decrease *potential** in 2021

	July '20	October '20	January '21	Q/Q Change
# Domains Measured	*3057*	*3108*	**7409**	*+138%*
Ad Networks	19.1	24.6	**11.2**	-55%
Audience Connectors	8.2	9.0	**6.7**	-26%
Advertising Analytics	25.0	31.0	**14.1**	-55%
Tag Management	1.0	1.2	**1.0**	-17%
Website Testing	1.5	1.8	**1.2**	-33%
Asset Analytics	2.5	2.8	**2.3**	-18%
App Analytics	1.5	1.7	**2.1**	+24%
Demand Side Platform	2.4	2.6	**1.2**	-54%
Data Management Platform	2.8	3.1	**2.0**	-35%
Creative Optimization	0.6	0.7	**0.2**	-71%
Fingerprinting	0.2	0.3	**0.2**	-33%
Cloud-Ready Connection	1.4	1.5	**2.8**	+86%

*Research pool materially increased, including more companies we weren't measuring in 2020 vs. 2021 and beyond.

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Good News: Fewer third-parties capture your data while you read today's headlines.

Bad news: Of those that do, more third-parties track, sell and integrate your behavior data into other platforms

Bonsai's January 2021 MDPR Data

	Media & Publications	Quarterly Change
# Companies Measured	458	+2%
Ad Networks	40.7	-18%
Audience Connectors	17.3	+19%
Advertising Analytics	46.3	-22%
Demand Side Platforms	3.7	-21%
Data Management Platforms	3.9	-22%
Fraud Detection	1.3	-19%
Data Onboarders	8.2	-30%
Contextual Ads	2.0	-5%
Video Ads	8.6	-13%
Fingerprinting Tools	0.34	-28%
Cloud-Ready Connections	5.3	+142%

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Do Tech Savvy Companies Use Less MarTech?

Type	NYSE	NASDAQ
3P Data Collectors	**7.1**	6.0
Total Marketing Technologies	**18.1**	17.2

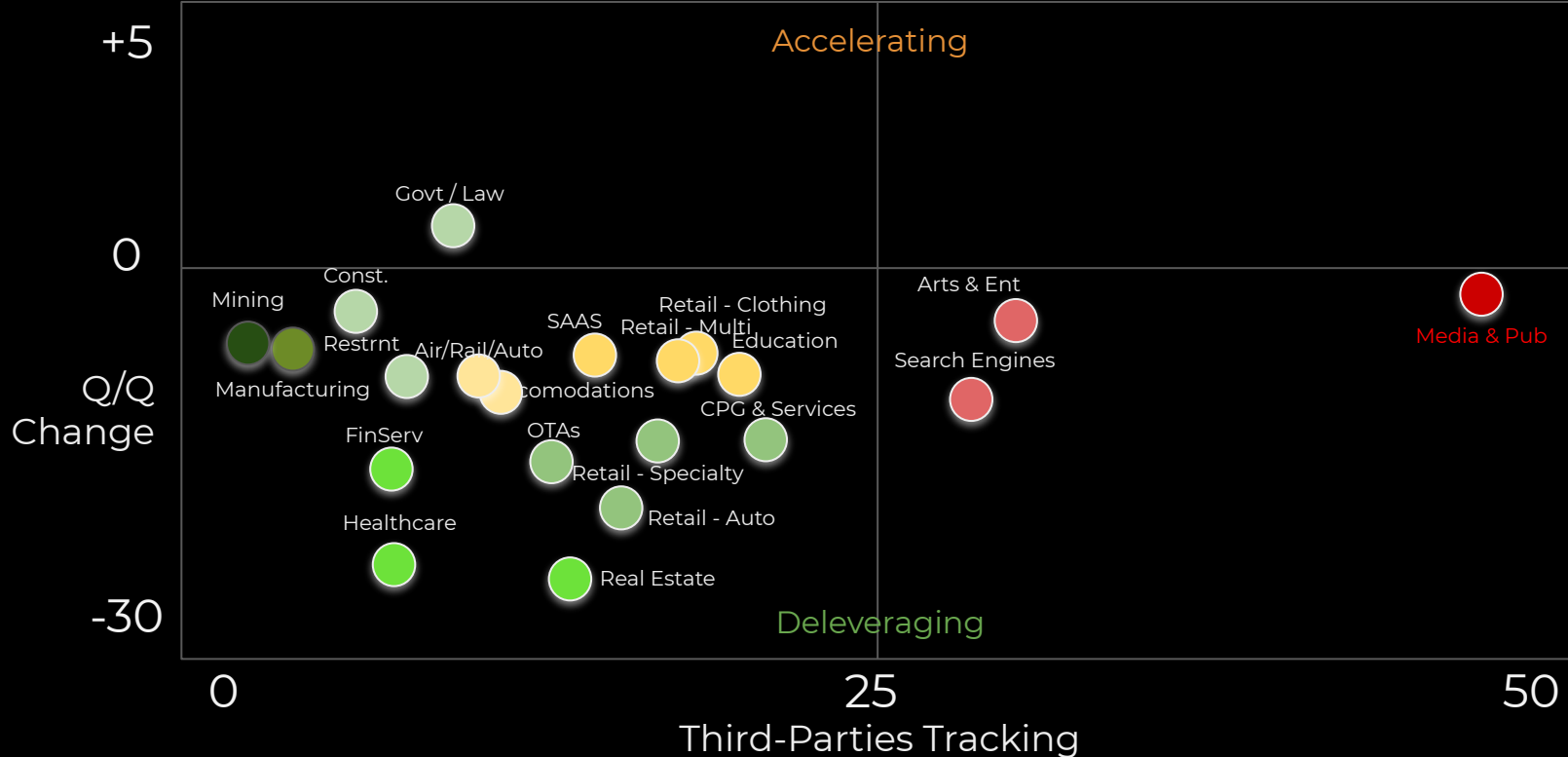*Average technologies deployed per-company listed on respective exchange*

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Biggest 3P Proliferators → Worst Shareholder Returns

# Companies Measured	3P Tracking Change vs. Q2 '20	**Stock Price Change vs. Q2 '20**
51	25% or greater reduction	+27.72%
230	0% to 25% reduction	+29.63%
90	0% to 25% increase	+37.63%
98	25% or greater increase	+26.44%

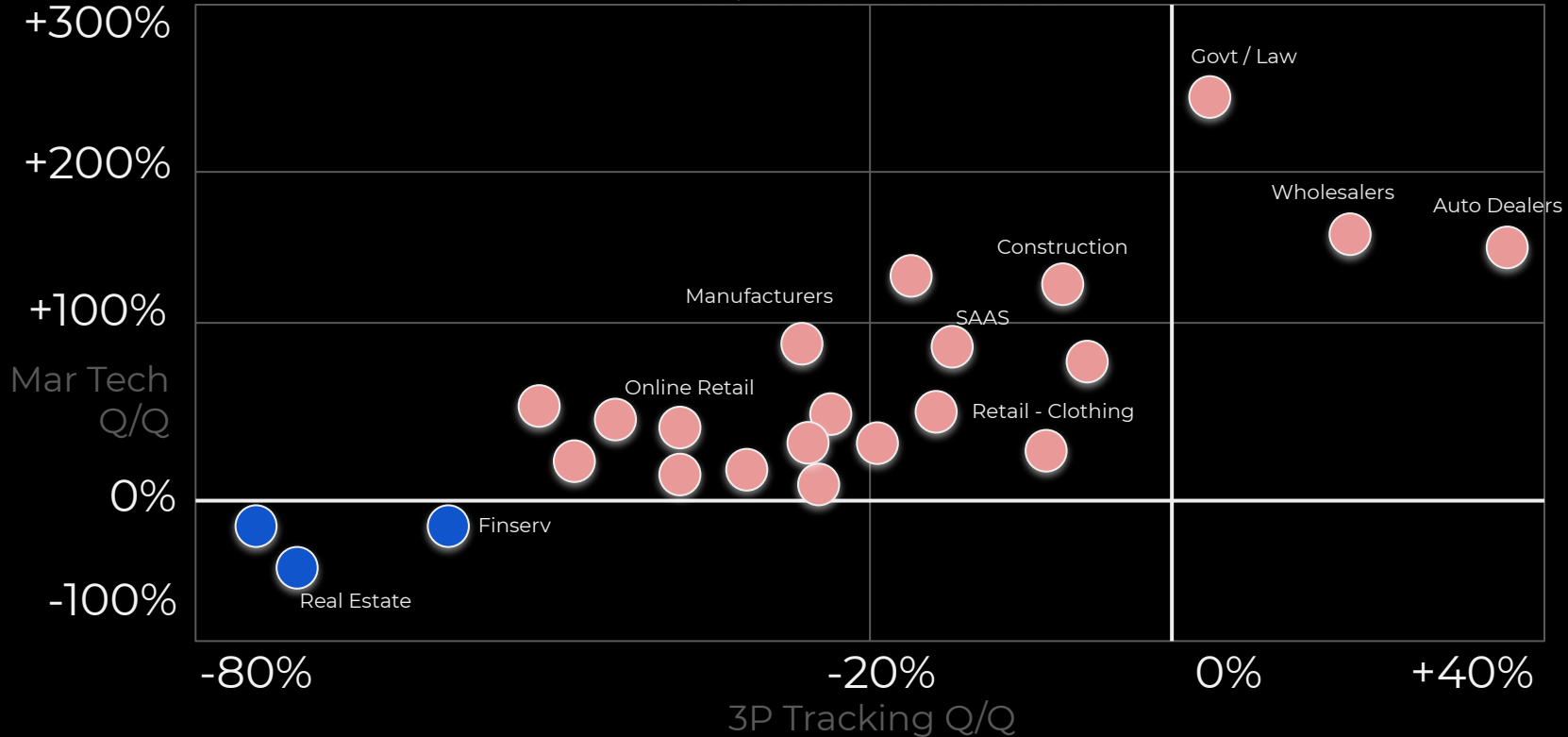*Includes only the publicly traded companies Bonsai measured since July 2020

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January 2021 3P Tracking Changes: Verticals

3P Tracking Down, Mar-Tech Complexity Up

Graphed: featured verticals

Chart — X-axis: 3P Tracking Q/Q (-80%, -20%, 0%, +40%); Y-axis: Mar Tech Q/Q (+300%, +200%, +100%, 0%, -100%)

Labeled points:
- Govt / Law
- Wholesalers
- Auto Dealers
- Construction
- Manufacturers
- SAAS
- Online Retail
- Retail - Clothing
- Finserv
- Real Estate

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+19% App Analytics over Q3 '20

Avg: App Analytics Platforms In-Use

Report Average: All Companies	2.0
Retail Trade - Multichannel	3.48
Media & Publication	3.34
Air, Rail & Auto Travel Services	3.25
Telecommunications & ISP	3.16
Accomodations	3.16
Law & Government	3.06
Retail - Home & Hardware	3.06
Retail Trade - Specialty	2.86

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Verticals: Increased fingerprinting over Q3 '20

Quarterly Change: Platforms In-Use

Industry Average	Fingerprinting
Construction	+188%
Retail Trade - Grocery	+125%
Manufacturing - Automotive	+64%
Retail Trade - Home & Hardware	+43%
Retail Trade -Auto Parts	+29%
SAAS & Software	+2%

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Who's Capable? 1P-Ready Verticals

Industry	Companies Tracked	Future-Ready*	% Ready
Retail - Clothing & Fashion	146	138	**94.5%**
Search Engines & Research	244	229	**93.8%**
Consumer Goods (CPG)	139	128	**92.1%**
Media & Publications	458	417	**91.0%**
Professional Services	199	176	**88.4%**
Arts & Entertainment	780	678	**86.9%**
Education & Ed. Services	147	127	**86.4%**
Software & SAAS	205	177	**86.3%**
Tech Infrastructure	253	215	**84.9%**
Finance & Insurance	721	559	**77.5%**

*Bonsai counts a company as "future-ready" when first-party analytics deployed & company is utilizing one or more first-party data onboarders with native connectivity to one or more digital ad networks. Bonsai does not analyze a company's strategic or operational readiness in practice as part of the MDPR.

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References & Resources

Marketing Data Proliferation Report

[1] Includes data from the top 200+ Media & Publications websites by US Web Traffic.. Data collected in April, 2020

[2] Ad Networks metric includes Ad Exchanges. Ad Analytics includes all marketing platforms that report on advertising performance, either with media metrics or business result metrics.

[3] MarketingLand. "What is Tag Management & Why Should You Care?" Bratt, L. Erik. August 21, 2014. https://marketingland.com/tag-management-care-95113

[4] Wikipedia. "Demand-side platform." June 24, 2020. https://en.wikipedia.org/wiki/Demand-side_platform

[5] Google Developers. "Speed is now a landing page factor for Google Search and Ads." Osman, Addi & Grigorik, Ilya. September 23, 2019. https://developers.google.com/web/updates/2018/07/search-ads-speed

[6] Think With Google: "Why marketers should care about mobile page speed." https://www.thinkwithgoogle.com/marketing-resources/experience-design/mobile-page-speed-load-time

[7] Ad Exchanger. "Everything you need to know about fingerprinting after the Chrome crackdown." March 10, 2019. https://www.adexchanger.com/privacy/everything-you-need-to-know-about-fingerprinting-after-the-chrome-crackdown/

[8] The Keyword. "Building a more private web." April 22, 2019. https://www.blog.google/products/chrome/building-a-more-private-web

[9] Moz://a. "Firefox 72 blocks third-party fingerprinting resources." January 7, 2020. https://blog.mozilla.org/security/2020/01/07/firefox-72-fingerprinting

[10] Safari Privacy Overview. November, 2019. https://www.apple.com/safari/docs/Safari_White_Paper_Nov_2019.pdf

[11] This is known as "First-Party Data."

[12] "Data onboarding is the process of transferring offline data to an online environment for marketing needs." Wikipedia. "Data Onboarding." April 14, 2020. https://en.wikipedia.org/wiki/Data_onboarding

[13] "Readiness" is registered for any company currently deploying 1P data collection, typically through asset or website analytics deployment, alongside first party audience onboarding & ad serving capabilities through one or more third-party marketing technology suites. Readiness % is measured as the total number of companies in the industry deemed "1P ready" over the entire sample of companies measured from within that industry.

January 2021 Edition Citations

[14] Companies listed in the NASDAQ and NYSE are as of January 2021. For a complete listing, please see: https://pkgstore.datahub.io/

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