

## **DMP (Data Management Platform) and MA (Marketing Automation) Services Markets in Japan: Key Research Findings 2017**

### ◆ Research Outline

**Yano Research Institute has conducted a study on the domestic DMP (Data Management Platform) and MA (Marketing Automation) services markets with the following conditions:**

1. Research period: August to October, 2017
2. Research target: Domestic digital marketing service vendors, etc.
3. Research methodologies: Face-to-face interviews by the expert researchers, surveys via telephone/email, and literature research

#### **<What is Digital Marketing? >**

Digital marketing is the marketing of products or services conducted by enterprises using data, possessed by the enterprises themselves or by the third parties, in order to reach customers. Out of various categories of digital marketing, this research handles DMP (Data Management Platform) and MA (Marketing Automation).

#### **<What are DMP (Data Management Platform)/MA (Marketing Automation)? >**

A DMP in this research is a system or a service that collects and analyzes the data on customer behaviors at each of various sales channels, aiming to clarify the characteristics of the customers so as to be able to optimize the ads, DM, emails, and other marketing methods accordingly.

An MA is a system or a service that integrates and automatically assesses vast volume of data on prospects and existing customers, and automatically executes the scenarios designed based on the assessment in order to maintain such prospects and customers individually, which would eventually create highly-promising business negotiations.

### ◆ Key Findings

#### ■ **DMP Service Market in 2016 Reached 5,770 Million Yen, Projected to Rise by 27.2% on Y-o-Y Basis in 2017**

The DMP service market in 2016 expanded to 5,770 million yen. Now that DMPs have been extensively used, building of a private DMP (i.e., a platform to integrate and synchronize the original marketing data, including purchase activities, user profiles, results of sales promotions, etc.) and using of a public DMP (sometimes multiple public DMPs; public DMPs are platforms to plan marketing by analyzing and categorizing the information on age, interests, website-browsing activities and etc. provided by third parties) have been in progress at more enterprises. Therefore, the market in 2017 is estimated to rise by 27.2% from the previous year to attain 7,337 million yen.

In a recent situation where the noteworthy topic in the market is second-party data which is the information possessed by other companies or the partners in the same industry or in the common environment, and where the government has announced a policy of enabling anonymized information to be treated as big data for sale and purchase, DMP vendors can expect new business to be generated because of their abilities of treating data.

#### ■ **MA Service Market Prospected to Attain 30,190 Million Yen by 2017, Utilization of AI in Progress**

The MA service market in 2016 achieved 24,545 million yen. The following elements, i.e., easier automation of measurement of effectiveness and of other activities, communication

channels with customers having been diverse, and one-to-one marketing recently having attracted attention, have expanded the demand of MA and peripheral services. The MA service market in 2017 is likely to increase by 23.0% to 30,190 million yen.

In general, MA vendors are apt to be proactive in utilizing AI, for instance to shorten the time for analysis, aiming to respond to real customer needs. In addition, AI is expected not only to raise the freshness of data, but also to improve the accuracy of data and the abilities of forecasting customer activities.

◆ **Report Format:**

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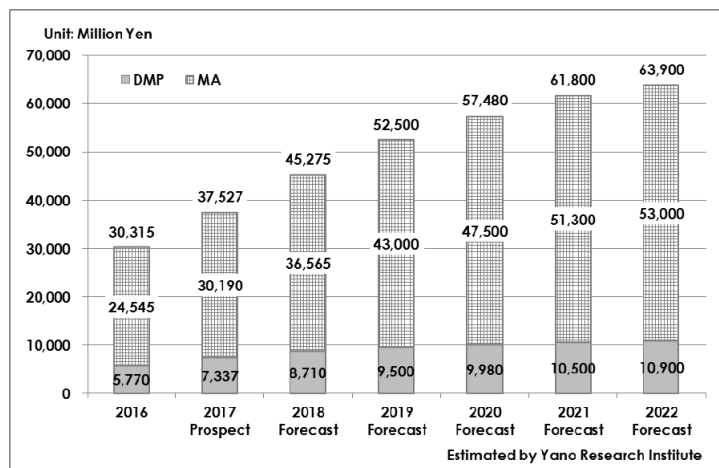
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■ **Table & Figure 1: Transition and Forecast of Digital Marketing Service Market Size**

Unit: Million Yen

	2016	2017 Prospect	2018 Forecast	2019 Forecast	2020 Forecast	2021 Forecast	2022 Forecast
Digital Marketing (DMP+MA)	30,315	37,527	45,275	52,500	57,480	61,800	63,900
DMP	5,770	7,337	8,710	9,500	9,980	10,500	10,900
MA	24,545	30,190	36,565	43,000	47,500	51,300	53,000
Y-o-Y Comparison (DMP+MA)	-	123.8%	120.6%	116.0%	109.5%	107.5%	103.4%
CAGR (DMP+MA)	-	23.8%	22.2%	20.1%	17.3%	15.3%	13.2%

Estimated by Yano Research Institute



Notes:

1. The market size is based on the sales of the businesses.
2. CAGR is compound annual growth rate from 2016 to the year concerned.
3. The digital marketing service market size is based on the total size of the markets of DMP services and MA services.
4. Digital marketing is the marketing of products or services conducted by enterprises using data, possessed by the enterprises themselves or by the third parties, in order to reach customers. Out of various categories of digital marketing, this research handles DMP (Data Management Platform) and MA (Marketing Automation). A DMP in this research is a system or a service that collects and analyzes the data on customer behaviors at each of various sales channels, aiming to clarify the characteristics of the customers so as to be able to optimize the ads, DM, emails, and other marketing methods accordingly. An MA is a system or a service that integrates and automatically assesses vast volume of data on prospects and existing customers, and automatically executes the scenarios designed based on the assessment in order to maintain such prospects and customers individually, which would eventually create highly-promising business negotiations.