



TREND STUDY 2022

—
DIGITAL ANALYTICS &
MARKETING ACTIVATION.

Trakken

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Moin!

For the seventh consecutive year, we are publishing our trend study in which we examine the most in-demand topics within Digital Analysis. Moreover, for the past five years, we have also been taking a look at the trends in Conversion Optimization. And as we are constantly evolving, we have further expanded the study to include the latest topics in the field of Marketing Activation.



This study is designed to identify industry trends. To make this possible, we believe it is important to ask the same questions about Digital Analytics and Conversion Optimization every year. At the same time we also want to reflect the changes in our fast-moving industry and cover, as comprehensively as possible, all topics closely related to Digital Analytics and Conversion Optimization.

The result is an insightful study which asks topical new questions whilst retaining previous core questions. Throughout the chapters we cover the most relevant areas from data collection, monitoring, data storage and enrichment to activation. Whenever possible, the answers are presented in a year-on-year comparison in order to easily derive trends. In addition to our survey questions, we asked for self-assessment to get a sense of how companies viewed their own performance in the respective areas. With the insights we generated, we have created a comprehensive picture of the industry which makes it possible to determine one's own position as an industry player.

None of this would have been possible without the numerous responses from the study participants. Our heartfelt thanks go to all of them!

We hope you enjoy reading our Trend Study 2022.

Your Trakken Team

2 Analysis approach

GOAL OF THE TREND STUDY

The trend study addresses the central issues surrounding Digital Analytics & Marketing Activation in the European region. In particular, this study records how the study participants work, which issues are of particular importance to them both now and in the future, and what challenges they experience. This is now the seventh time that this study has been carried out, which makes it possible to map and analyse the results over an extended time period. Furthermore, the polling of new questions ensures that the latest industry trends are taken into account.

SURVEY METHOD

The data was collected via an online survey conducted between 10-21 January 2022. The questionnaire relied primarily on closed questions which were structured according to the topic areas of data collection, reporting & steering, data storage, data enrichment and activation. Since 2021, a sentiment survey has also been conducted to determine the extent to which the participants consider themselves to be in a good position with regard to the five topic areas. The insights described below are the result of the online survey; they provide a solid picture of the Digital Analytics & Marketing Activation area.

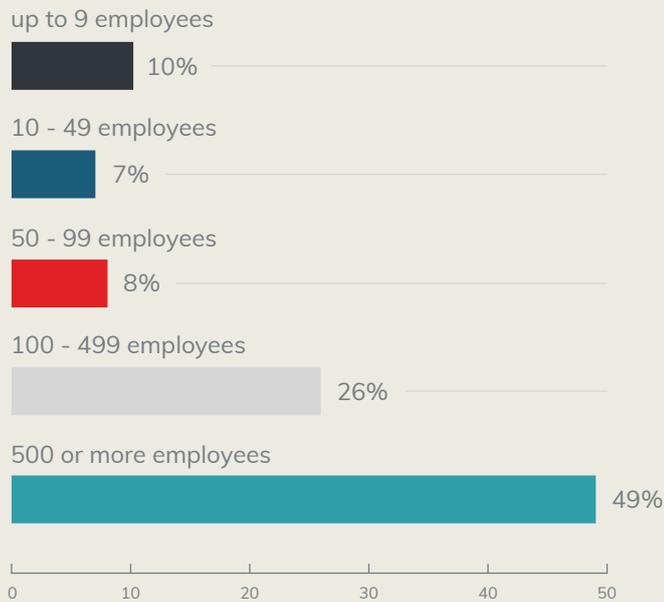
COMPANIES SURVEYED

Companies from all sectors were surveyed, which means that the results are reflective of a diverse cross-section of the industry. As in previous years, the ecommerce, media/content, IT services and retail sectors dominate. Of the respondents, 61% work on the company side while the remaining 39% work as a consultant or in an agency. Respondents work primarily in the marketing/online marketing, digital analytics or ecommerce divisions. With regard to company size, three quarters of the participants are employed in a medium-sized or large company, i.e. in companies with at least 100 employees. The majority of respondents were from Germany (78%). Additionally 8% of the responses come from Switzerland and 5% from Austria.

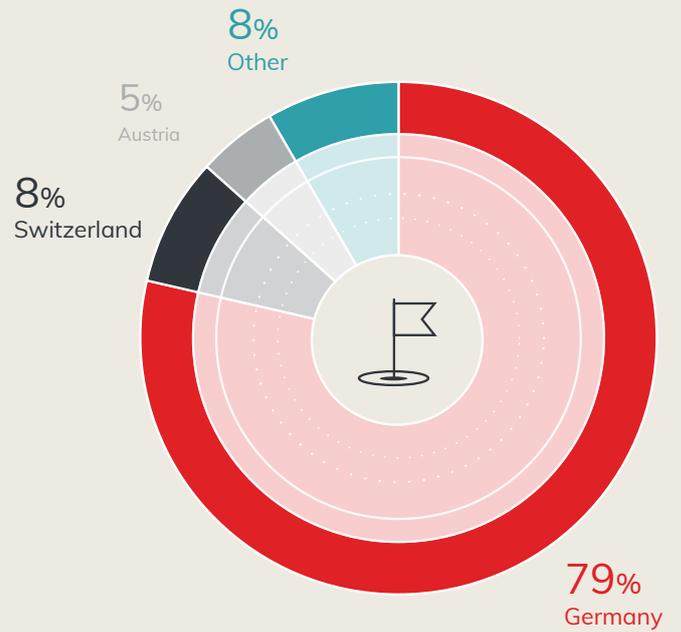
► Which of the following options best describes your company or your role?



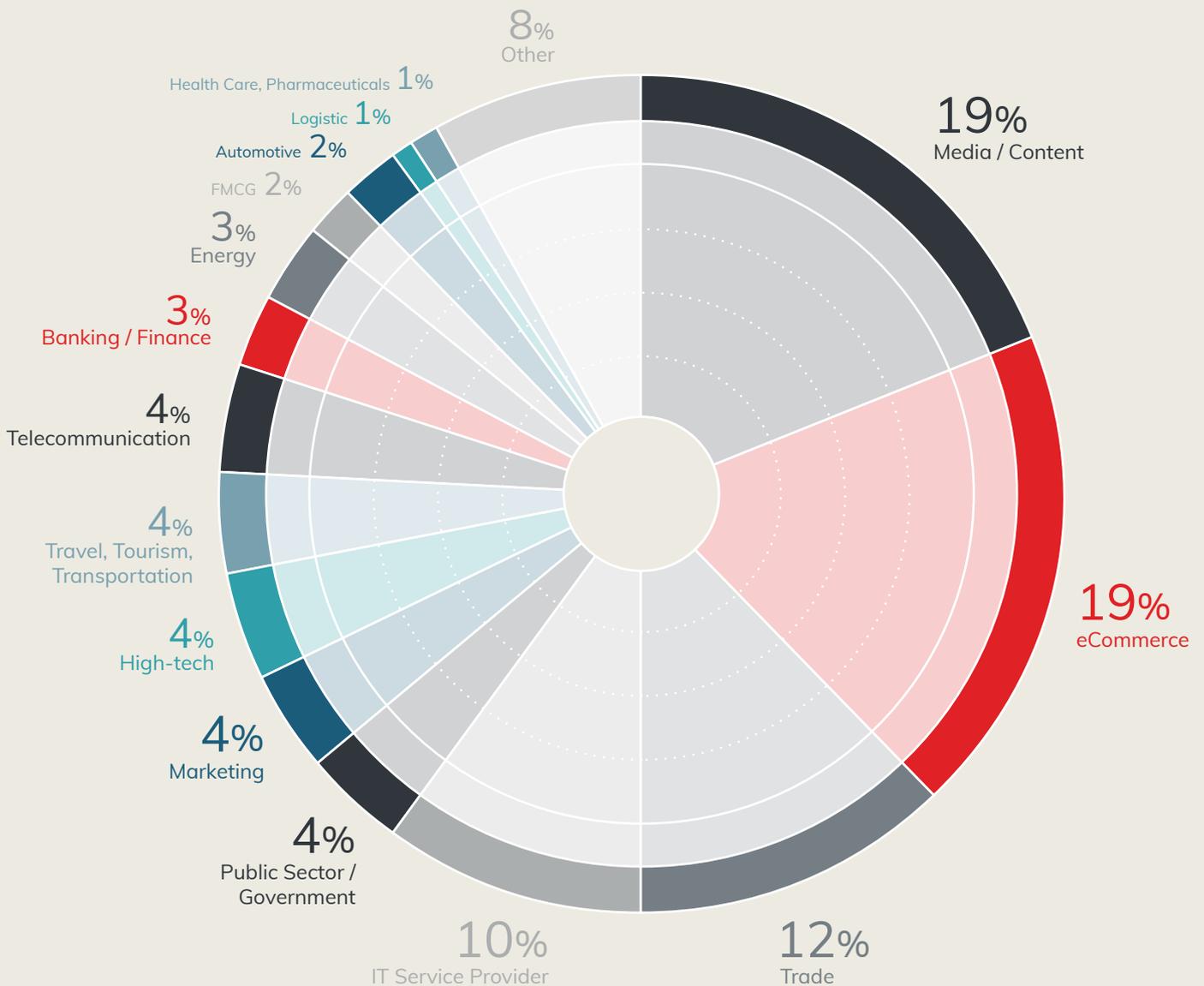
Company size



In which country do you work?



My company belongs to the following sector:



3 Results at a glance & respondents' self-assessment

The Digital Analytics & Marketing Activation trend study is being published for the seventh time this year, and where possible, all results have been compared with those of previous years to identify industry trends. In addition, this edition includes a handful of new questions.

This year's survey once again reveals a multifaceted picture of survey participants. Participating industries are diverse, with many respondents coming from ecommerce, media/content, IT service providers or retail. In addition, around two thirds of respondents work for companies and are part of an in-house team. In terms of company size, three quarters of the industry players come from medium-sized and large companies - especially from Germany, but also from Switzerland and Austria.

FIRST PARTY DATA COLLECTION

(COLLECTING DATA)

First party data collection is the basis for all further data analysis and decision making within the digital business. Among the survey participants, Google tools continue to dominate. Far ahead of the other tools of Digital Analysis and Conversion Optimization, Google Analytics is used in its free and paid version respectively by 63% and 57% of all respondents. For A/B testing, Google Optimize is the preeminent tool with 72% of survey participants using it. When it comes to tracking, 100% of companies track websites, whilst 80% track mobile websites and 52% track apps. In terms of conversion trackers and audience pixel providers used, search marketing (88%) and social media platforms (80%) are the main focus. A clear majority of companies (89%) use tag management systems to scale marketing and analytics pixels to minimize dependency on IT resources.

REPORTING & STEERING

(MONITORING DATA)

Reporting and steering describe the continuous and complete monitoring of all digital touchpoints (online and offline) by means of functional and well-visualized dashboards. Marketing performance management via attribution modeling also falls into this area. Most companies use digital analytics tools (93%) and spreadsheets (73%) for deeper analysis of the data collected. Spreadsheets are used less frequently for deeper analysis than in previous years. On the other hand, there has been an increase in usage year-on-year for Big-Data (46%) and BI tools (58%). Power BI (42%) and Tableau (36%) were the most popular of the BI tools. When it comes to communicating KPIs, 76% of respondents use data visualization tools and roughly 67% use Excel or Google Sheets as well as PowerPoint or Google Slides. A high priority topic for many companies is the allocation of the marketing budget. In just under half of the companies surveyed, their decisions were based on historical, non-data-driven empirical values. Advanced rule-based attribution models are growing in use year-over-year to 43%. Only a quarter use data-driven attribution models for budget allocation.

DATA STORAGE

(CONNECTING ALL DATA)

With the multitude of data pots, bringing together and working with different data tables is an essential area for a holistic approach. Most of the time, companies work with Digital Analytics data in multiple tools at the same time. Of these tools, data visualization tools, such as Data Studio, make up 78%. After a decline in 2021 (65%), the Digital Analytics tool interface has become more widely used (75%). Exported reports in Excel or Google spreadsheets are used just as often (75%). The proportion of companies with a data warehouse for marketing data has increased to 46% compared to the previous year, with more than 5 marketing-relevant data sources connected to it in around half of all cases.

DATA ENRICHMENT

(ENHANCING DATA)

Data enrichment is the process of combining first party data from internal sources with disparate data from other internal systems or third-party data from external sources. This includes various prediction models and the identification of user behavior patterns. Around 60% of all companies already analyze their Digital Analytics data together with other internal or external data. In most cases, this is transaction data, advertising data and/or CRM data. 82% of all companies perform complex modeling and forecasting based on Digital Analytics data. The focus here is on attribution, customer segmentation and the forecasting of key KPIs.

ACTIVATION

(ACTIVATING DATA ON- AND OFFLINE)

Data activation describes the generation of added value from the previously collected, stored, and enriched data. This includes A/B tests, recommendation engines, and the increase of marketing efficiency via remarketing, similar audience targeting, or the personalization of advertising materials. The Digital Analytics data collected is used by the majority of the companies surveyed to analyse user behavior and for online marketing activities. When it comes to designing A/B tests, 95% of respondents use this Digital Analytics data as the basis for their tests. In addition, 56% of respondents rely on recommended best practices to design their tests, 44% use mouse tracking or heat maps and 36% use online surveys. A/B testing is mostly carried out as client-side (52%) or as both client- and server-side (27%) A/B testing. Digital Analytics data is also used in advertising tools where the leading use cases are remarketing (88%) and, in half of all cases, finding new high-value users and personalizing advertising materials.

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OUTLOOK 2022

Data protection and privacy, the customer journey and data visualization were the three most frequently prioritized topics by companies this year. The three biggest challenges identified were data protection and privacy, GDPR-compliant tracking, data quality, and transferring knowledge into actions. Taking a very specific look at Digital Analytics, 69% of respondents plan to implement server-side tracking in 2022; a big increase since the last survey (2021: 55%). In addition, 63% of respondents are tackling merging app and web tracking (migrating to GA4). When it comes to Conversion Optimization, the main areas being worked on in 2022 are user experience (76%), personalization (50%) and landing page testing (48%). The budget for Digital Analytics & Conversion Optimization will increase for 40% of the companies surveyed and remain the same for 53% - compared to the previous year. However, for more than half of all companies (61%), the share of the total marketing budget still remains below 10%.

WITH REGARD TO THE FOLLOWING AREA, MY COMPANY IS IN THE BEST POSSIBLE POSITION.

(RESPONDENTS' SELF-ASSESSMENT)

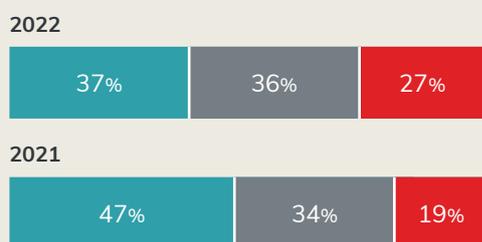
In each topic area, participants were asked to rank their level of agreement with the statement that their company was in the best possible position in that area. The results do not disclose details about individual companies, but they do allow us to identify those areas where the respondents' self-assessment is more positive or more negative.

Altogether, most companies see themselves as being most strongly positioned in the area of Reporting & Steering: Almost every company uses Digital Analytics tools for this purpose and the use of BigData as well as BI tools is increasing significantly. The assessment is somewhat worse for the area of First Party Data Collection, where the general setup of Digital Analytics and Conversion Optimization are considered in this study. These assessments represent a considerable change because, in the previous year, the tendencies were exactly the opposite - Data Collection represented the strongest area in the majority of cases, followed by Reporting & Steering. In the area of Activation, the companies now see themselves in a much better position compared to the previous year (24% vs 37%). According to the study, the design of A/B tests received an increase. The respondents remain strongly involved in the topics of remarketing, personalization and finding valuable users. The assessment regarding data storage is very ambivalent. Work with Digital Analytics data takes place in several tools at the same time, with 46% of all companies already having a data warehouse for marketing data. However, the result makes it clear that there is still room for improvement, at least in some areas. The area of data enrichment scores worst in the self-assessment: More internal or external data could be used more frequently in the evaluation of Digital Analytics data, and complex modeling and forecasting could be implemented. After all, data collection and analysis alone are not enough; success also depends on taking action based on the insights generated. A year-on-year comparison also shows that the estimates for data storage and data enrichment remained constant.

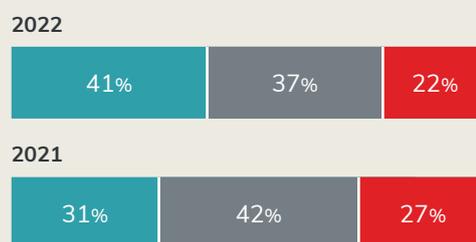
► How much do you agree to the following statement: With regard to the following area, my company is very advanced.

● Agree ● Neither Agree nor Disagree ● Disagree

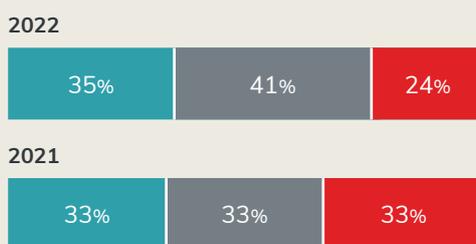
FIRST PARTY DATA COLLECTION
(COLLECTING DATA)



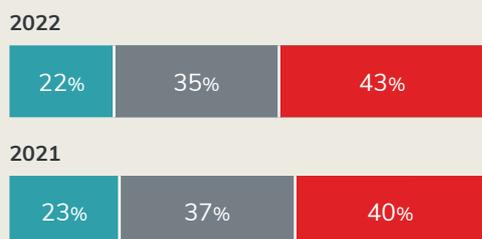
REPORTING & STEERING
(MONITORING DATA)



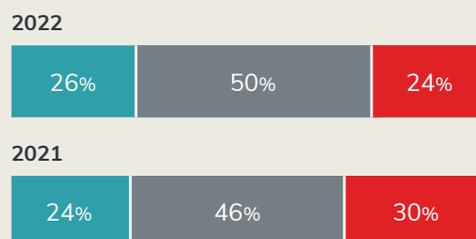
DATA STORAGE
(CONNECTING ALL DATA)



DATA ENRICHMENT
(ENHANCING DATA)



ACTIVATION
(ACTIVATING DATA ON- AND OFFLINE)

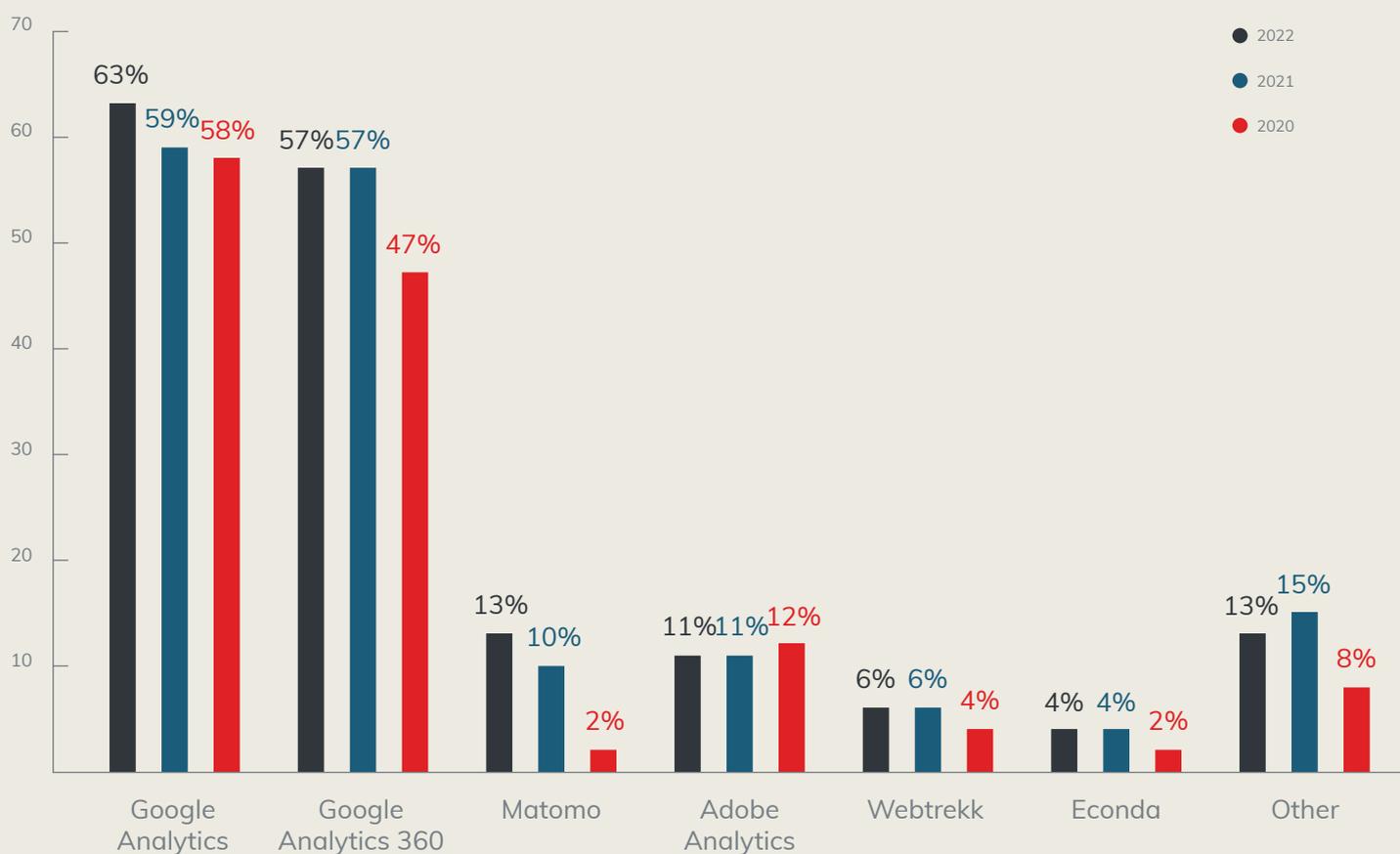


4 - RESULTS IN DETAIL

4.1 First Party Data Collection (Collecting Data)

► Which Digital Analytics Tools are you using? (Multiple answers possible)

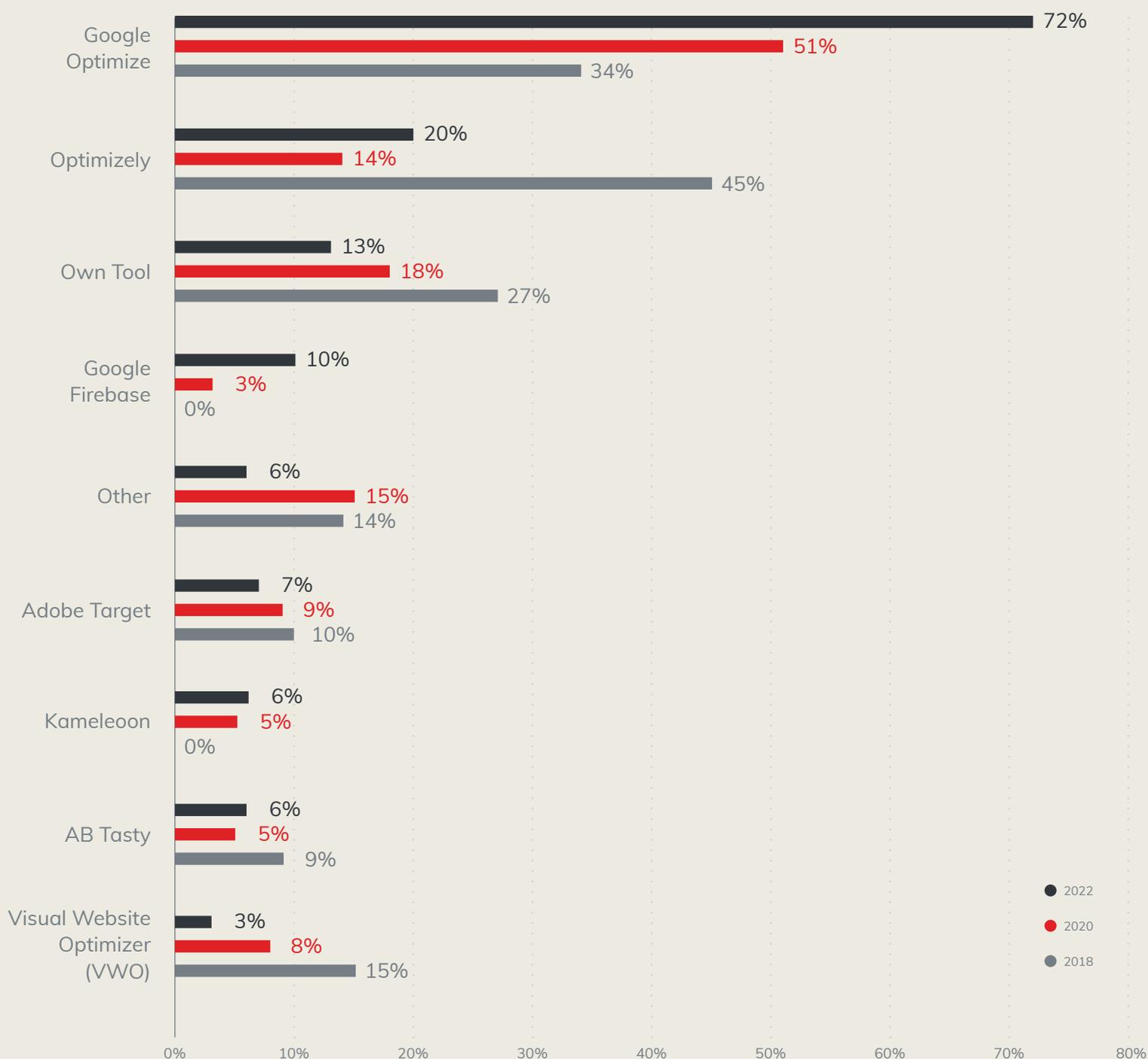
Digital analytics often involves the use of several tools at the same time. Overall, the free Google Analytics tool dominates (63%), followed by the paid Google Analytics 360 (57%). Google thus remains the market leader by far this year. A long way behind, Matomo and Adobe Analytics are the tools used by 13% and 11% of the surveyed companies respectively. With a usage of 6% or less, tools such as Webtrekk, Econda or other providers do not yet play a major role in the Digital Analytics landscape. The distribution in 2022 is quite similar to that from the previous year. A further increase in the use of the free Google Analytics variant and Matomo is striking. Google Analytics and Google Analytics 360 are also used in conjunction with other tools for 41% of the companies surveyed.



► With which tools do you use to run your A/B tests? (Multiple answers possible)

The most used tool to run A/B tests is Google Optimize - it is the favorite of 72% of respondents. The second most used tool is Optimizely (20%), followed by in-house tools (13%) and Google Firebase (10%). The remaining tools are used by less than 10% of respondents. These are Adobe Target (7%), Kameleoon (6%), AB tasty (6%) and Visual Website Optimizer (VWO) (3%).

A comparison of the development over the past few years shows that Google Optimize continues to gain market share and Optimizely is also being used again by more companies after sharp declines. In addition, there has been an increase in the use of Google Firebase.



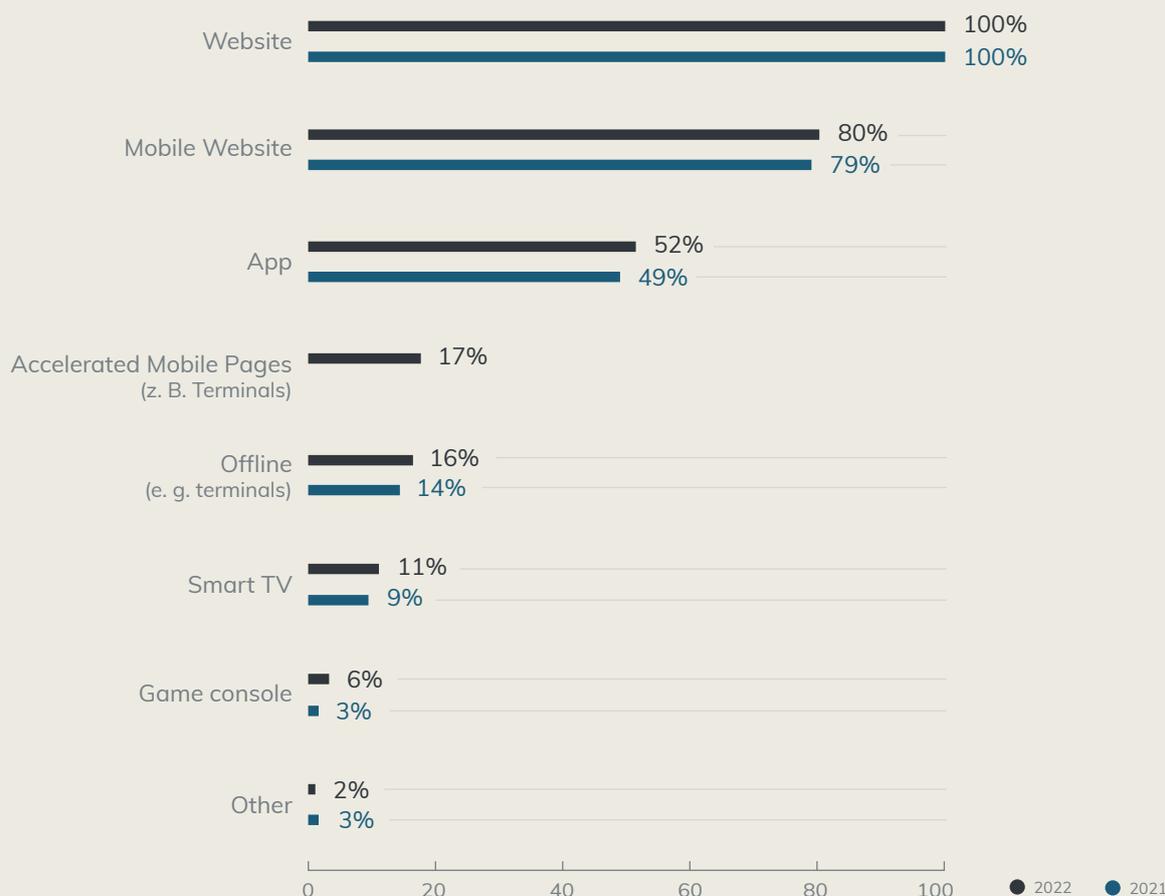
► Which conversion tracker or audience pixel provider are you using? (Multiple answers possible)

When it comes to conversion trackers and audience pixel providers, the majority of respondents focus on search marketing (e.g., Google Ads/Search Ads 360 - 88%) and social media platforms (e.g., Facebook/Instagram - 80%). In addition, AdServers (e.g., Campaign Manager 360 - 55%), demand-side platforms (e.g., Display & Video 360 - 41%) and dedicated remarketing partners (e.g., Criteo - 35%) are frequently used. Compared to the previous year, no significant changes can be observed. The only increase was in AdServer use (55% vs. 47%) and a decrease in other tools (13% vs. 5%).



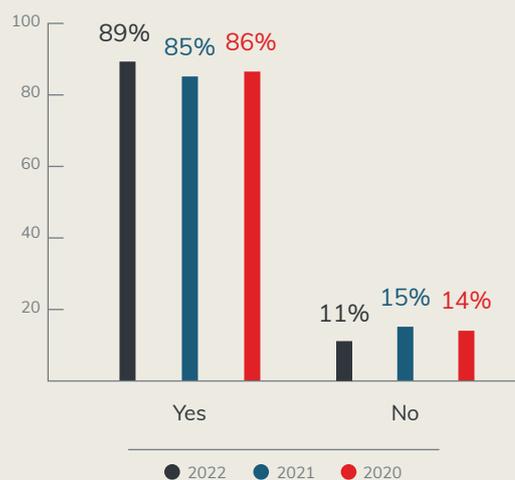
► Which touchpoints do you cover with your tracking? (Multiple answers possible)

The companies surveyed primarily cover their websites (100%) and mobile Websites (80%) with their current tracking setup. Apps are tracked by a good half of all respondents. This is less frequently the case for Accelerated Mobile Pages (AMPs) (17%), offline touchpoints (16%), Smart TV (11%) and game consoles (6%). The distribution from the current year is almost the same as that of the previous year.



► Do you use tag management systems to scale Marketing and Analytics pixels?

The majority of respondents (89%) use tag management systems to scale marketing and analytics pixels. These reduce reliance on IT resources for example, and enable tags to be deployed quickly, regardless of sprint cycles. A trend analysis over the past years shows a fairly consistent result.



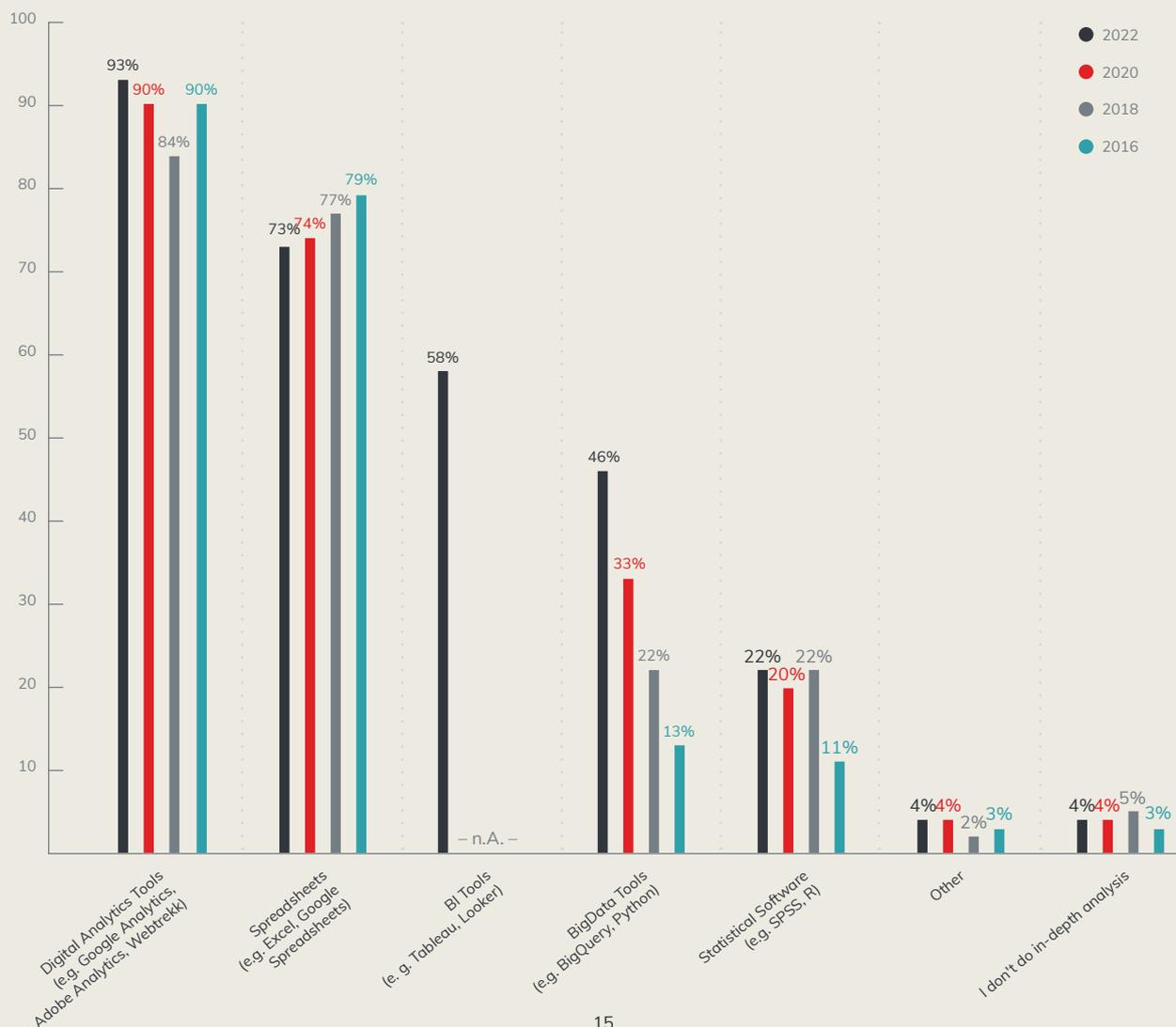
4 - RESULTS IN DETAIL

4.2 Reporting & Steering (Monitoring Data)

► What tools do you use for in-depth analysis?

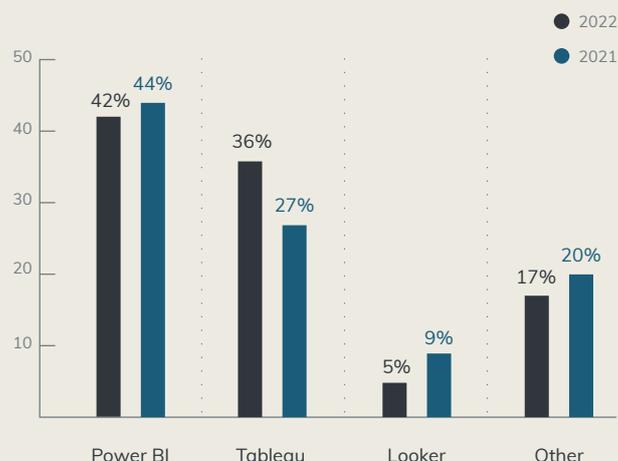
(Multiple answers possible)

In-depth analyses are performed by almost all companies surveyed (96%), with different tools being used in parallel. In particular, Digital Analytics tools, such as Google Analytics and Adobe Analytics (93%), and spreadsheets such as Excel and Google Sheets (73%) are used for these analyses. With regard to spreadsheets, there has been a slight decline in recent years. This may be related to the increased use of BI tools such as Tableau and Looker (58%) and BigData tools such as BigQuery and Python (46%). The consistently positive trend for BigData tools should be emphasized here. In 2016, only 13% of respondents used them, while in 2022, 46% of all companies did. There is no major change compared to previous years in the use of statistical tools (e.g. SPSS and Python) which have each remained at around 20%.



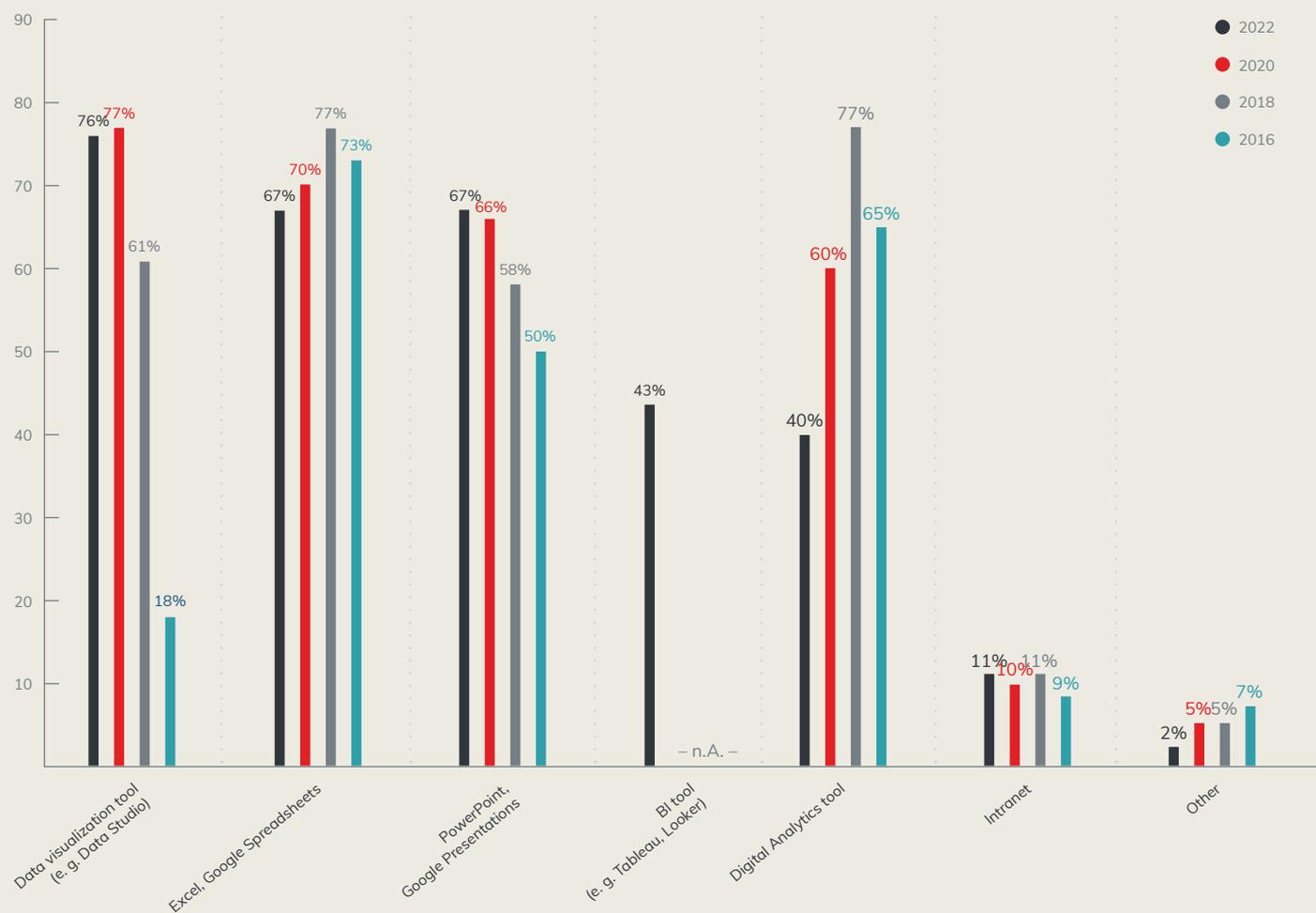
► Which BI tool do you use?

Of those companies that use Business Intelligence tools, 42% use Power BI. Tableau is the second most used, at 36%, and Looker, at 5%, is the third most used. Data for other vendors is varied, with Qlik and Domo tools cited, for example. Year-on-year comparison reveals a sharp increase in Tableau usage (36% vs. 27%) and a slight decrease in Looker (5% vs. 9%).



► How do you communicate KPIs? (Multiple answers possible)

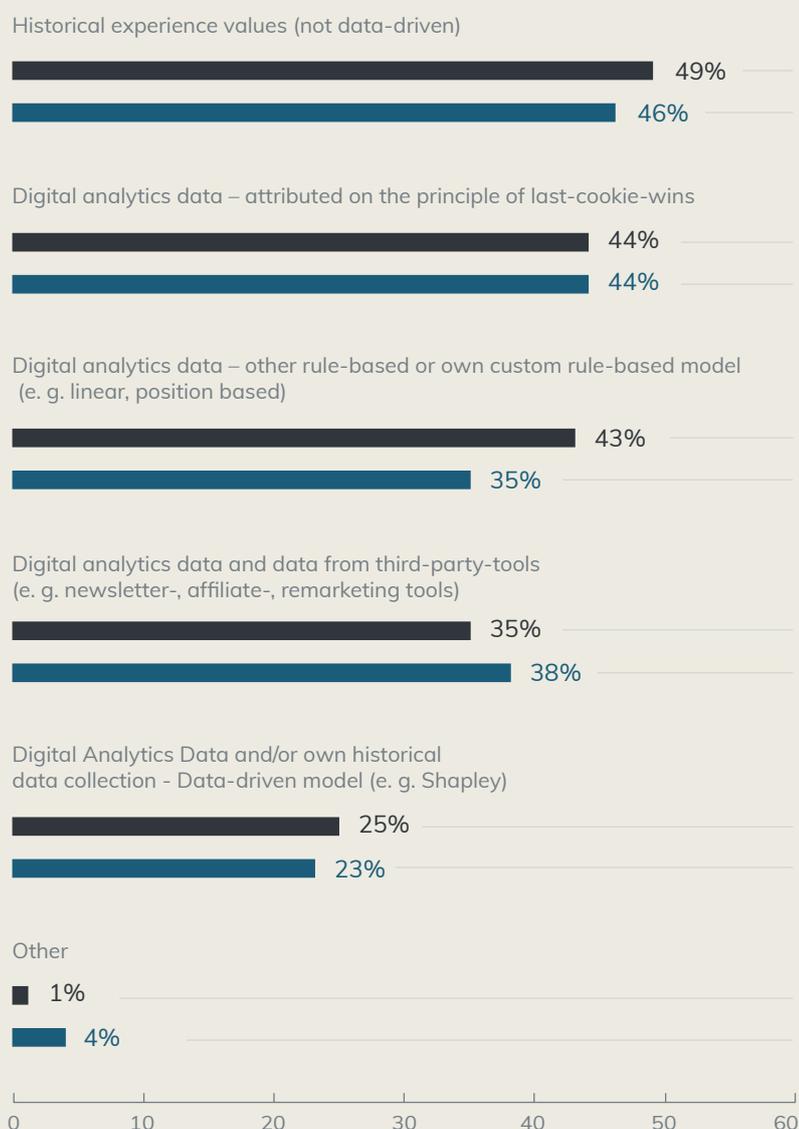
A good three quarters of the companies use a data visualization tool to communicate KPIs, which means that these tools remain the predominant choice. In addition, two thirds of companies use Excel or Google Sheets and presentation software such as PowerPoint and Google Slides). The annual trend here reveals a decline for Excel and an increase for Presentations. Another 40% or so of respondents also use BI tools and Digital Analytics tools for communicating their KPIs. The second tool mentioned was used much more frequently for KPI distribution two years ago (40% vs. 60%).



► Which method do you currently use to allocate your digital marketing budget?

(Multiple answers possible)

Various approaches are used in parallel to decide on the allocation of the digital marketing budget. Almost half of all companies allocate their budgets based on empirical values that are not data-driven. The „last-cookie-wins“ attribution model and extended or proprietary rule-based models are used by 44% and 43% of respondents respectively. The advanced models show a slight increase in usage year-on-year (43% vs. 35%). Digital Analytics data and data from third-party tools are used by 35% of companies. Only a quarter of companies rely on data-driven attribution models, such as Shapley Value, for budget allocation.

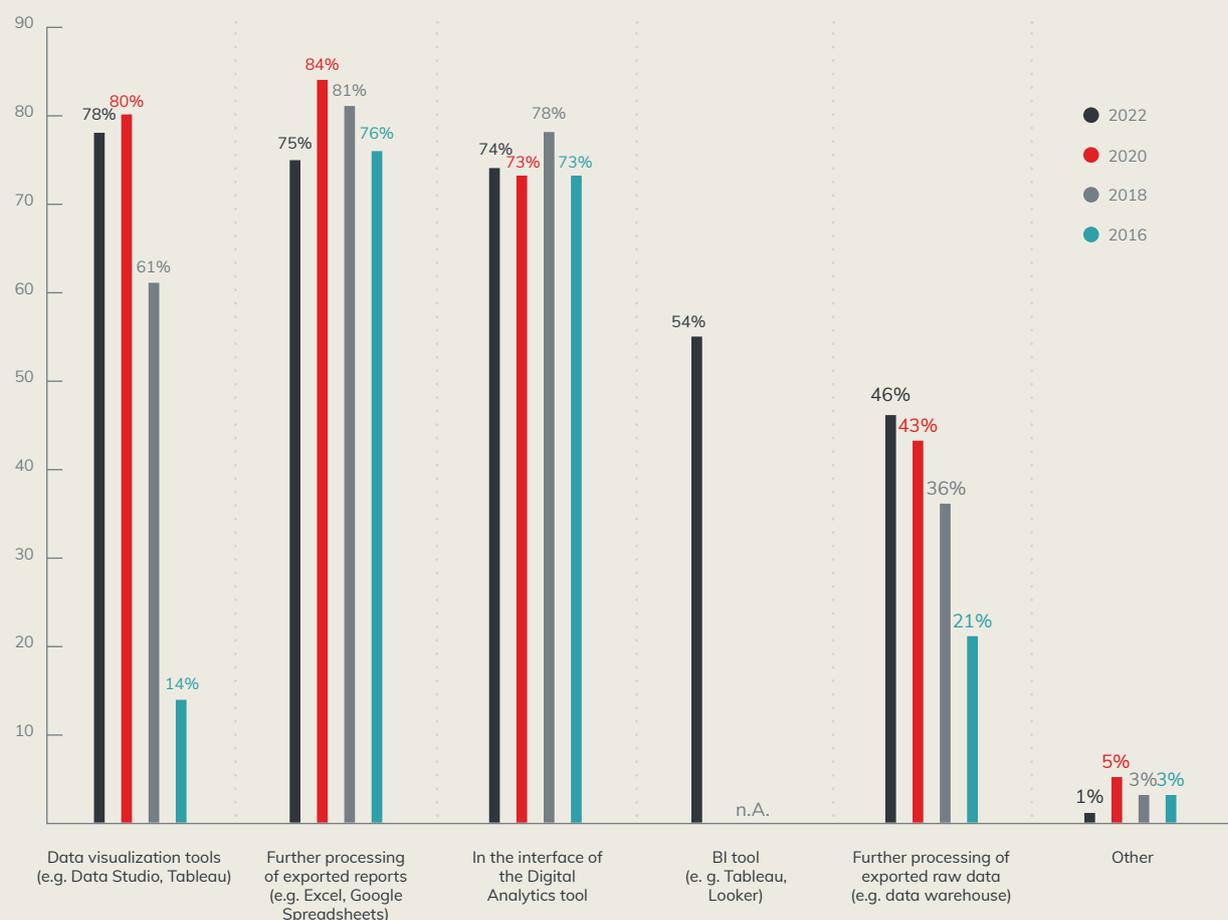


4 - RESULTS IN DETAIL

4.3 Data Storage (Connecting All Data)

► In which scenarios do you work with your Digital Analytics data? (Multiple answers possible)

Companies work with their digital analytics data in a variety of tools - usually in several at the same time. The companies surveyed most frequently use data visualization tools such as Data Studio (78%). Around three quarters also use the interface of the Digital Analytics tool itself and process the data by exporting reports to Excel or Google Sheets. Half of the respondents also use BI tools and a further 46% use the exported raw data in their data warehouse. The annual trend shows an increase in the use of data visualization tools and in the further processing of exported raw data.



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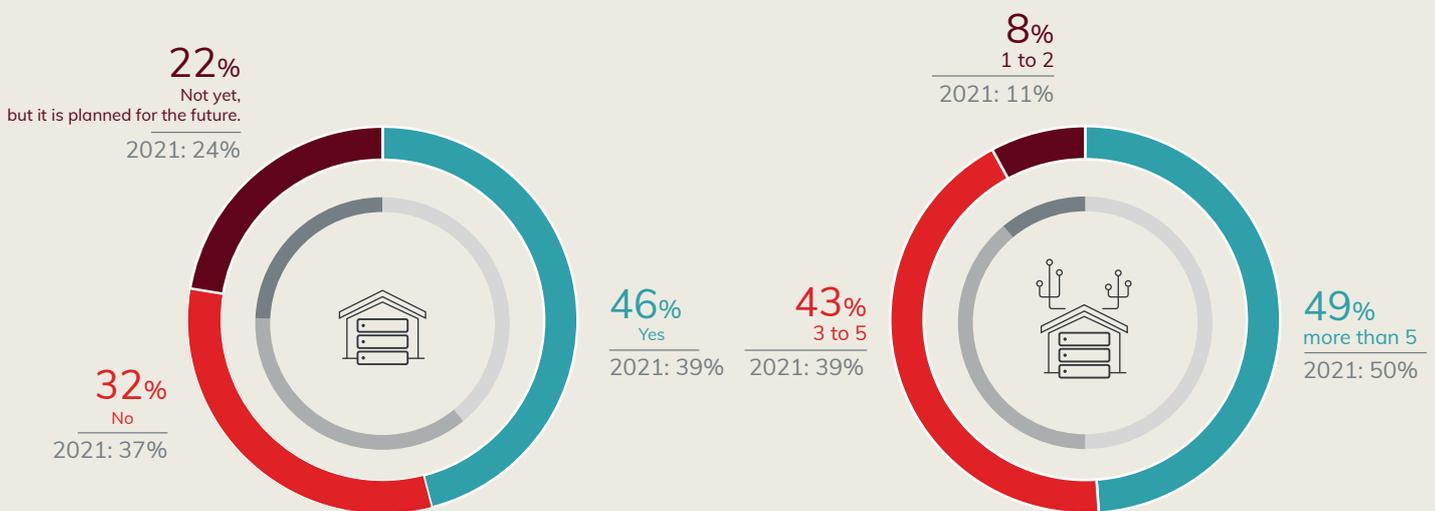
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► Do you have a data warehouse for marketing data?

At 46%, almost half of all companies surveyed will have a data warehouse for marketing data in 2022. This proportion has risen by 7% compared with the previous year. A good one-fifth of the companies do not yet have a data warehouse, but plan to do so in the future.

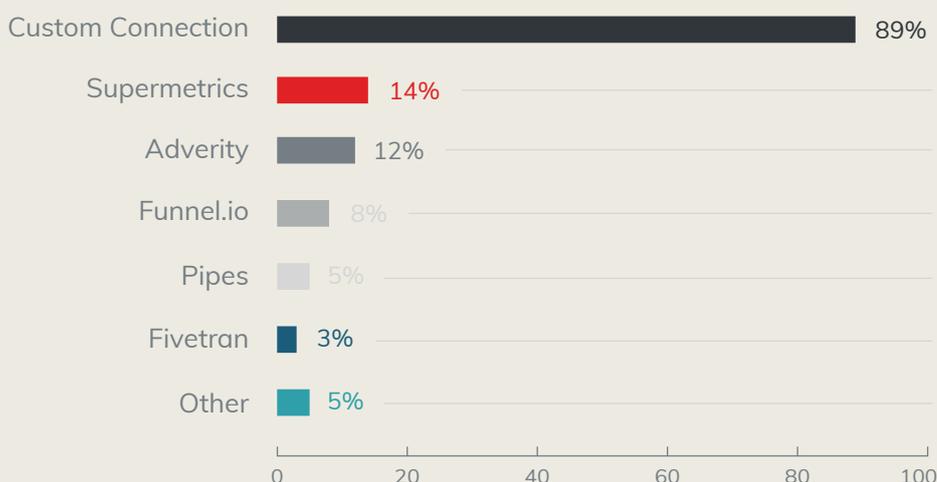
► How many data sources for marketing data are connected to your data warehouse?

Almost half of the companies that use a data warehouse have more than 5 data sources for marketing data connected to it. Another 42% have between 3 and 5 data sources linked to it. And for 8% of the respondents, only 1 to 2 data sources are connected to the data warehouse.



► How is the data from different sources connected to the data warehouse?

89% of the companies with a data warehouse connect their various data sources via a self-defined solution. However, some of the companies also make use of external providers. Solutions from Supermetrics (14%), Adverity (12%) or Funnel.io (8%) are some of the main examples of this.

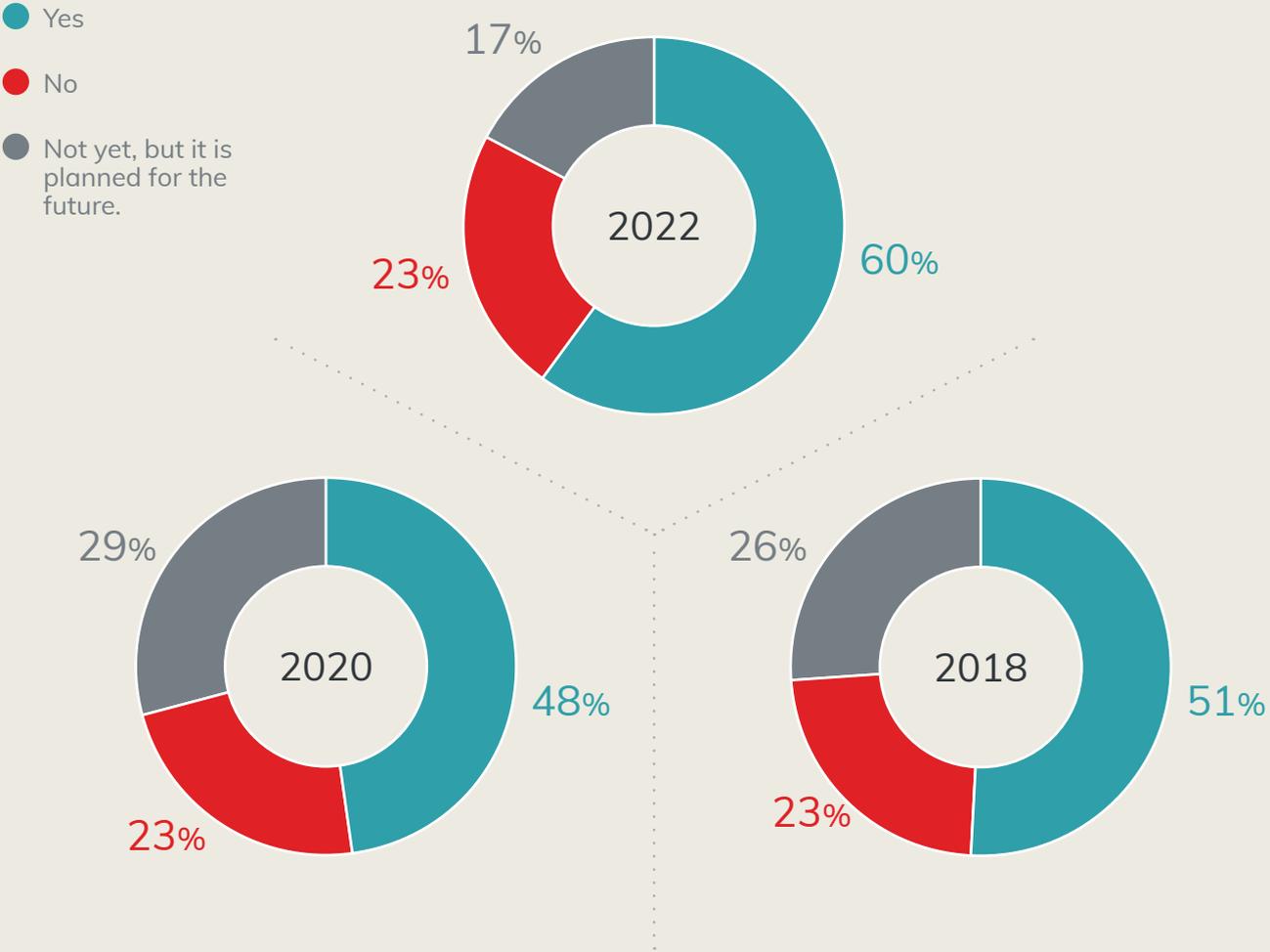


4 - RESULTS IN DETAIL

4.4 Data Enrichment (Enhancing Data)

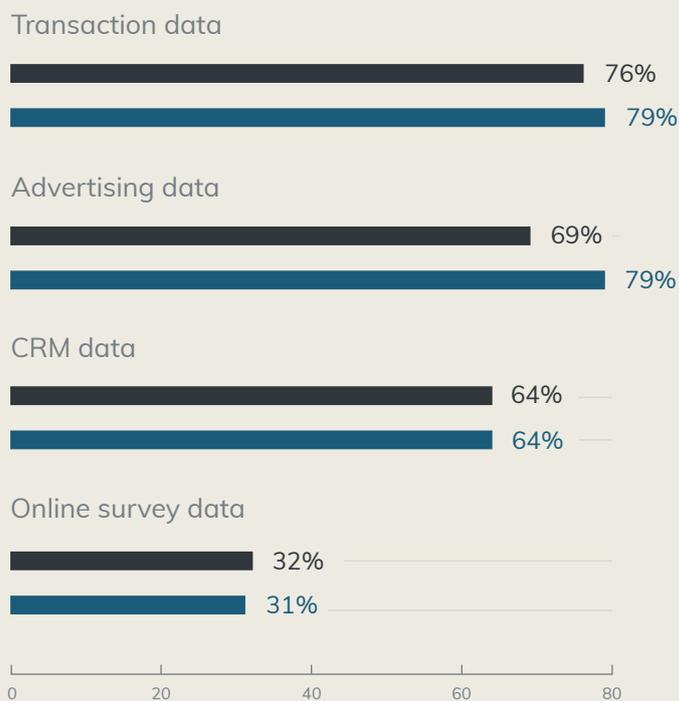
▶ Do you analyze the Digital Analytics data in combination with other internal or external data (e.g., offline sales data, competitor data)?

The majority of companies (60%) analyze their Digital Analytics data in combination with other internal or external data they collect, e.g., offline sales data or competitor data. Another 17% do not yet do so, but have planned to do so in the future. The remaining 23% of survey participants do not use any additional data in analyses. The trend analysis reveals a constant proportion of those companies that look at Digital Analytics data in isolation. Some of those that did consider more extensive analytics also switched to doing so in recent years.



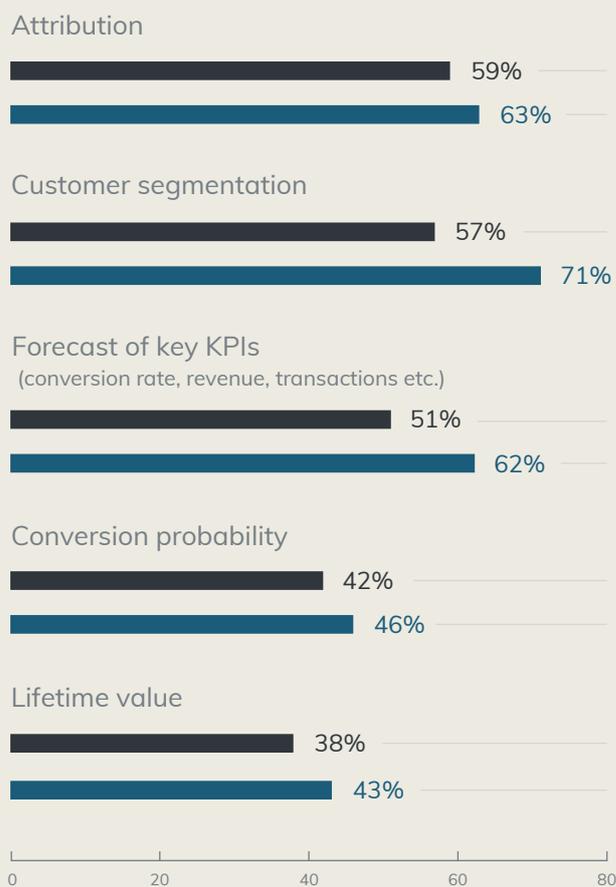
► What data do you analyze along with the data from Digital Analytics data? (Multiple answers possible)

A deeper look into the type of data that is analyzed in combination with Digital Analytics data reveals a diverse picture. It is primarily composed of transactional (76%), advertising (69%) and CRM (64%) data. Online survey data is used in analyses by just under a third of respondents use it. A comparison with the results from 2021 shows a drop of 10% in the joint analysis of digital analytics and advertising data.



► Which of the following complex modeling and predictions have you conducted in 2021 based on Digital Analytics data? (Multiple answers possible)

The digital analytics data collected enables complex modeling and forecasting. Of all companies surveyed, 18% do not yet perform such complex analyses; in the previous year, this figure was 23%, indicating a progressive trend in this field. The most frequently performed analyses relate to attribution (59%), customer segmentation (57%) and KPI forecasts (51%). Slightly less frequently covered by companies is modeling related to conversion probability (42%) and lifetime value (38%). Overall, a year-on-year comparison shows that the top topics are mentioned less frequently this year than in the previous year.



4 - RESULTS IN DETAIL

4.5 Activation (Activating Data On- and Offline)

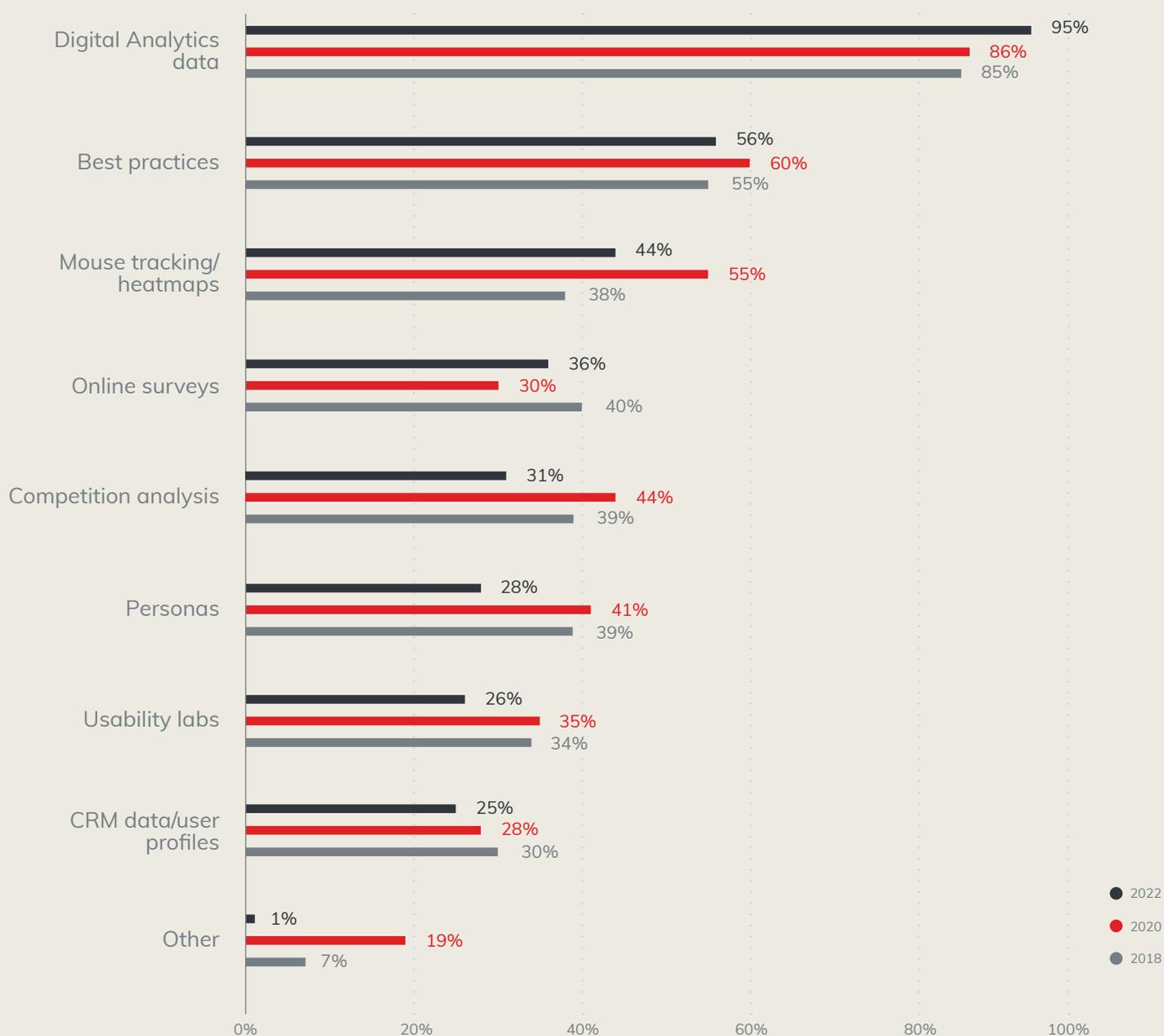
► How does your company utilize its Digital Analytics data? (Multiple answers possible)

In almost all the companies surveyed, the Digital Analytics data collected is used for the analysis of user behavior (94%). The second most frequent use of the data is for online marketing activities (84%), such as remarketing. In 55% of the companies, the data is used for product optimization and in 37% it is integrated into a comprehensive data pool and then processed further. One in four companies also uses the data for downstream internal processes (e.g., logistics, purchasing). The annual trend shows a stable picture with regard to the usage scenarios described.



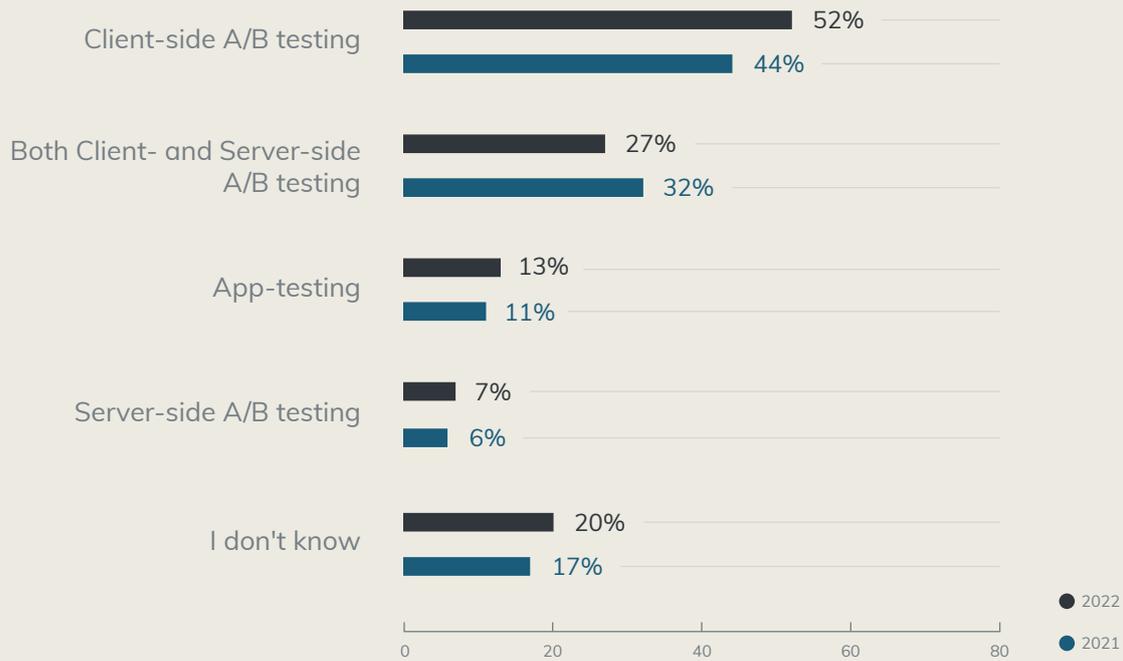
► Which data sources do you use for the design of your A/B tests? (Multiple answers possible)

The design of A/B tests is usually based on several data sources. First and foremost, Digital Analytics data is used by 95% of respondents to plan tests. Best practices (56%), mouse tracking or heatmap tools (44%) and online surveys (36%) are also regularly used for planning these tests. In less than a third of the companies, test concepts are based on competition analyses (31%), personas (28%), usability labs (26%) and CRM data or user profiles (25%). The trend development shows a continuous increase in the use of Digital Analytics data - and at a very high level. The other sources are each losing importance, which is particularly striking when comparing 2020 with 2022. After a decline in 2020, online surveys are now once again showing an increase in usage for designing A/B tests.



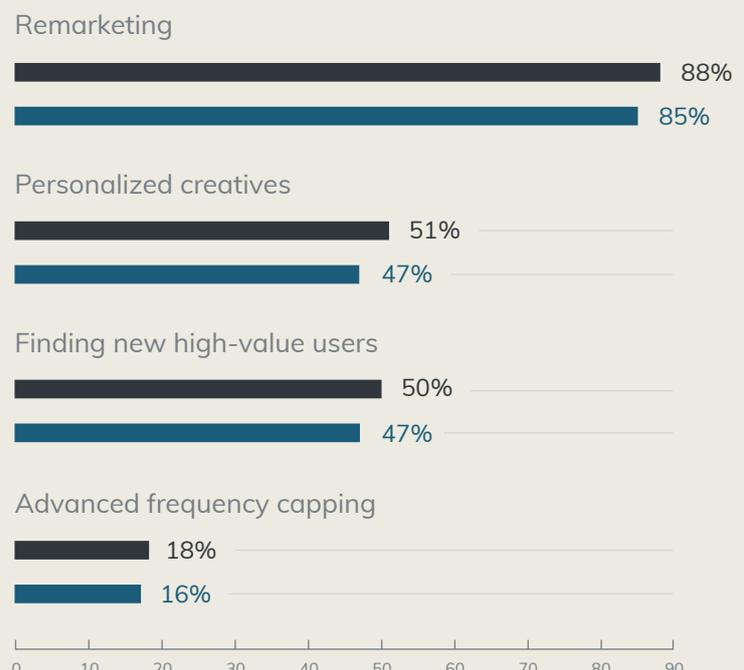
► How do you implement A/B testing in your company? (Multiple answers possible)

Half of the companies surveyed use client-side A/B testing and 27% use both client-side and server-side testing in parallel. Only 7% of the companies use server-side testing less frequently. The trend here shows a proportionate increase in the client-side variant of testing and a decrease in both solutions being used together. App testing is used by a further 13% of companies.



► How do you utilize generated data in advertising tools? (Multiple answers possible)

There are many options for using generated data in advertising tools. Data is used for remarketing in 88% of companies. In addition, half of the respondents report using it for personalizing ads and/or finding new high-value users. 18% of the companies surveyed use the advanced frequency capping use case.



4 - RESULTS IN DETAIL

4.6 Outlook 2022

► How strongly do you prioritize the following topics in 2022?

The three highest prioritized topics in 2022 are data protection & privacy, customer journey, and data visualization. This is a three-year trend which shows the continued high relevance of these topics. Consent management has become more relevant, especially due to the current discussions and regulations, and is now ranked fourth among the top topics in 2022. Data visualization is also related to report automation and distribution which is the fifth highest ranked topic. UX optimization was included in the selection for the first time this year. It occupies a significant position among the companies surveyed. Furthermore, data consolidation, server-side tracking, attribution and personalization are among the top 10 topics this year.

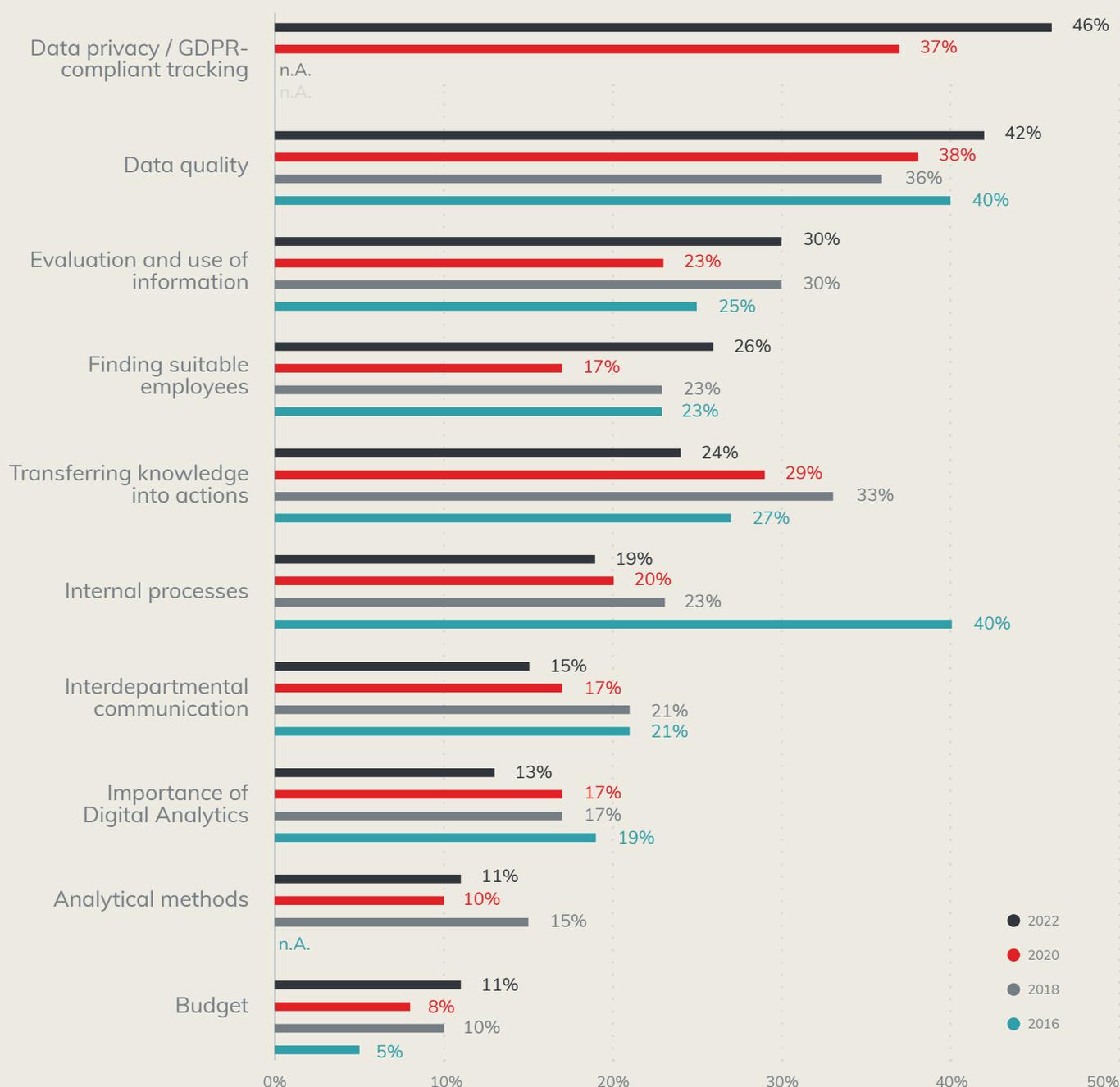


► What are the three biggest Digital Analytics challenges for your company in 2022?

(Multiple answers possible)

The companies surveyed consider data protection & privacy or GDPR-compliant tracking (46%), data quality (42%) and analysis and use of information (30%) as the biggest challenges for 2022. One in four respondents see finding suitable employees (26%) and translating information into action (24%) as current challenges. In contrast, fewer than 20% of companies rate internal processes (19%), interdepartmental communication (15%), importance of digital analytics (13%), analytical methods (11%) or budget (11%) as challenges.

A review of the trend over the past few years reveals an increase in companies rating data protection & privacy, analysis and use of information, and finding suitable employees as challenging. Still relevant but decreasing in trend are transferring knowledge into actions, internal processes, interdepartmental communication and the importance of digital analysis.

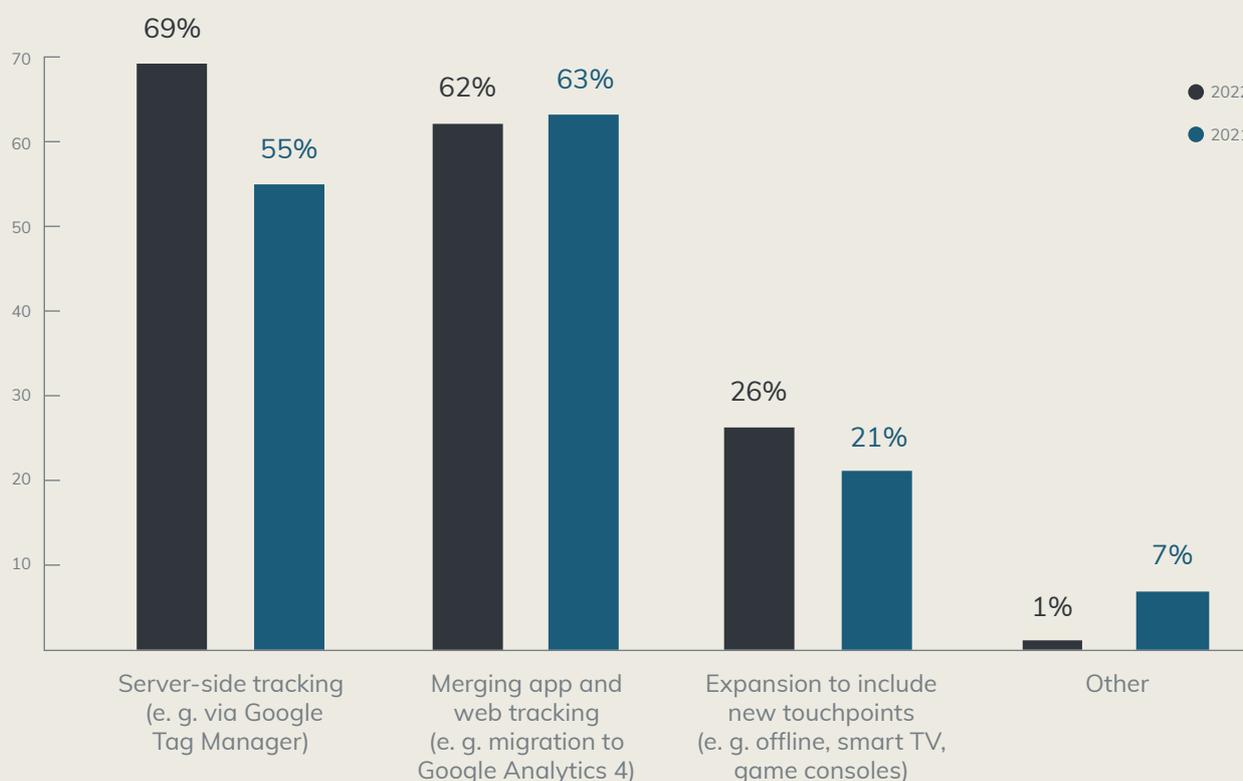


► What adjustments regarding tracking are you planning to implement in 2022?

(Multiple answers possible)

For 69% and 62% of all companies surveyed, respectively, the planned tracking adjustments are Server-side tracking (e.g. via Tag Manager) and Merging app and web tracking (migration to GA4). The extension of tracking to include new touchpoints, such as Offline touchpoints, Smart TV or Game consoles, is only considered important by one in five companies.

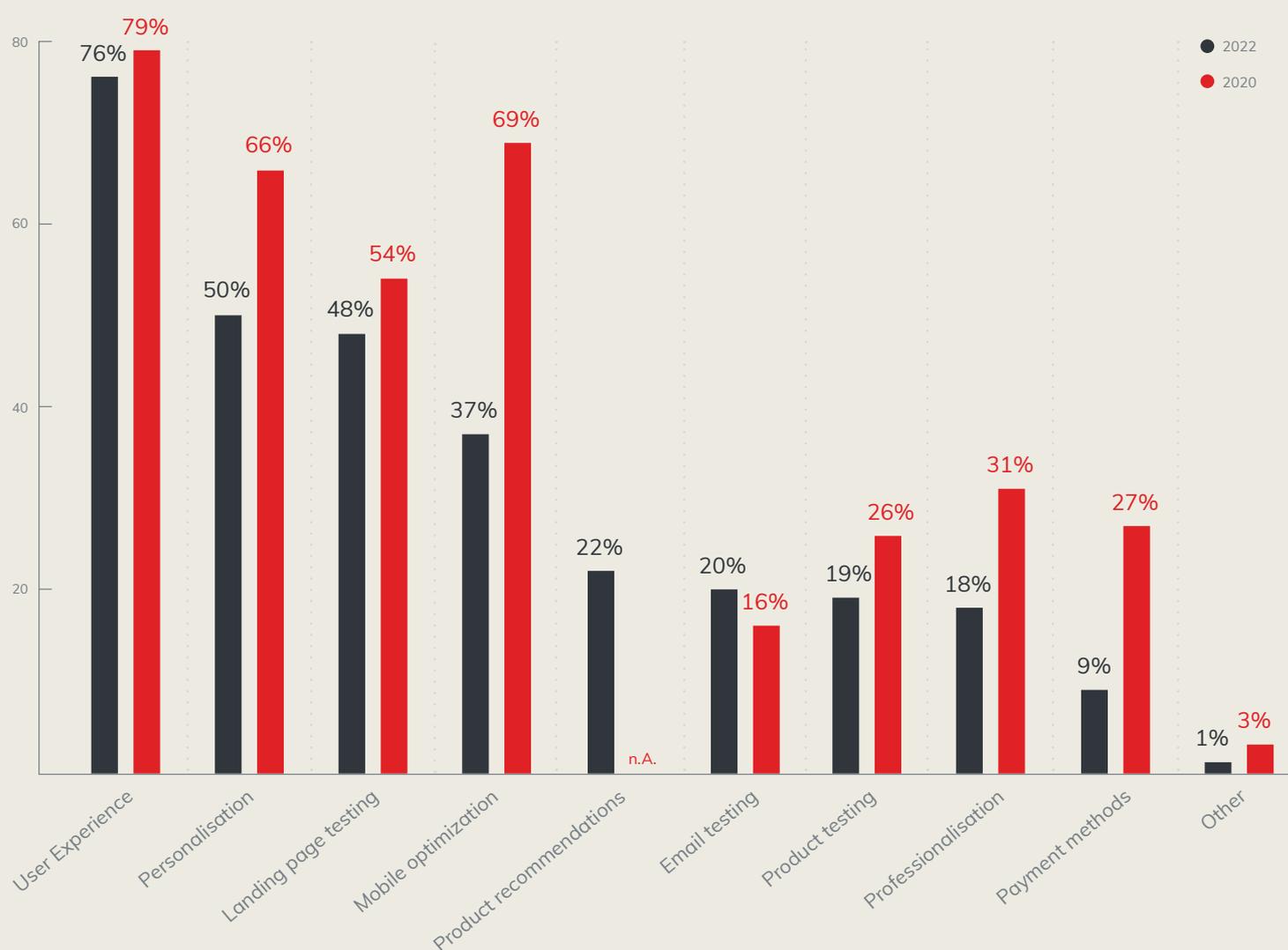
A major change since the last survey can be observed in Server-side tracking. While only 55% of companies planned to make adjustments in this area last year, this figure has already risen to 69% in 2022. The other adjustments are on the to-do list for a similar number of companies as in the previous year.



► Which of the following Conversion Optimization projects, topics and questions are you planning for in 2022? (Multiple answers possible)

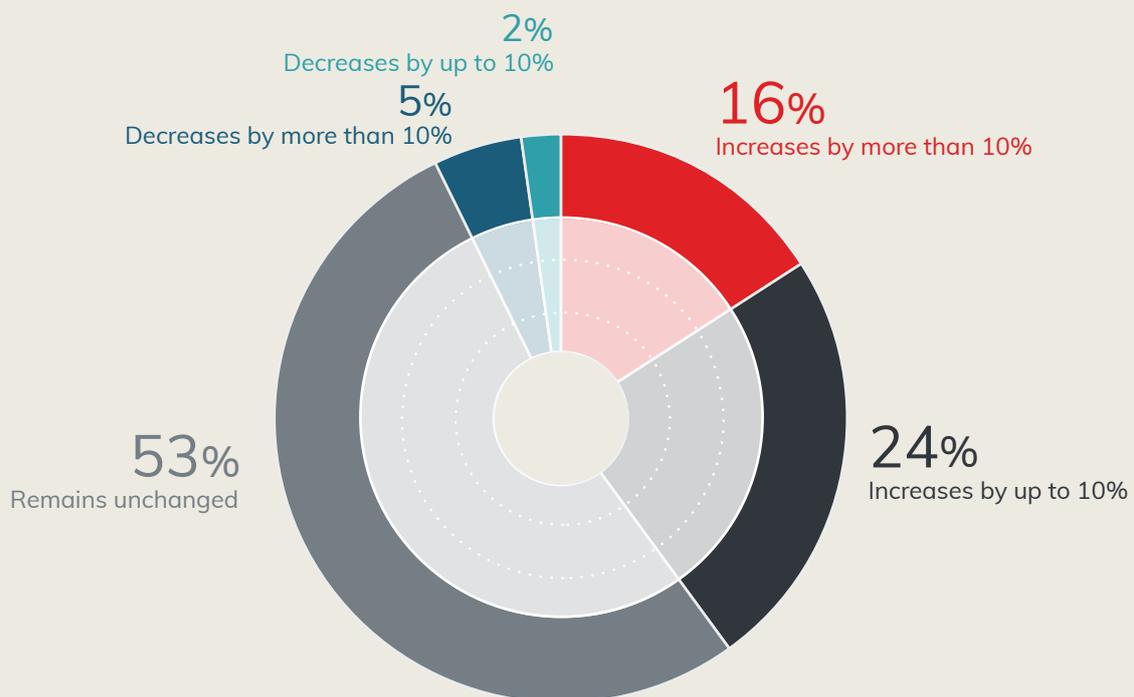
The majority of companies are focusing on improving the user experience in Conversion Optimization this year (76%). Around half of the respondents also say they will implement projects relating to personalization (50%) and landing pages (48%). Around one in five companies want to look at product recommendations (22%), email testing (20%), product testing (19%) and professionalization (18%). Projects around payment methods are important for 9% of the respondents.

The trend includes topics that are almost exclusively focused on by fewer companies over the years. The strongest effect can be seen in the topics of mobile optimization, personalization, professionalization and payment methods.



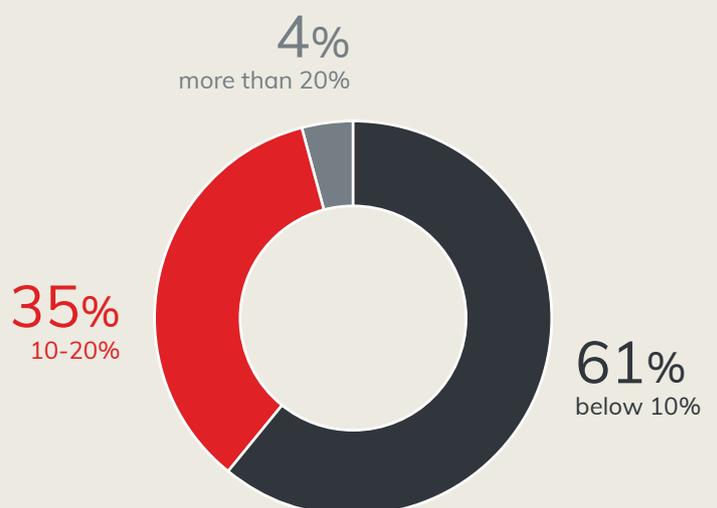
► How will your company's 2022 Digital Analytics & Conversion Optimization budget change compared to the prior year?

For 53% of the companies surveyed, the Digital Analytics & Conversion Optimization budget will remain stable compared to 2021. 16% of the companies can look forward to an increase of more than 10% in the budget. For 24% of the companies, the budget will increase by up to 10%. Very few respondents said their budget will decrease with 5% saying their budget would decrease as much as 10% and a further 2% saying it would decrease by more than 10%.



► What percentage of the marketing budget will be allocated to Digital Analytics & Conversion Optimization in 2022?

For 61% of the companies surveyed, the budget for Digital Analytics & Conversion Optimization accounts for less than 10% of the total budget. For 35% of the companies, 10% - 20% of their marketing budget is available for this area. The budget share of only 5% of the respondents exceeds 20% of the total marketing budget.



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