

RESEARCH REPORT

# The State of Data Collaboration: A Global Perspective

Despite challenges with data orchestration and activation, marketers and agencies are optimistic about adopting collaborative and versatile data technologies to overcome barriers, gain a holistic view of consumers, and drive business outcomes.



## TABLE OF CONTENTS

|  |    |
|--|----|
| <b>Introduction</b>  | 3  |
| <b>Key takeaways</b>   | 4  |
| PART ONE:  |    |
| <b>Something is rotten in the state of data</b>                      | 6  |
| PART TWO:  |    |
| <b>Open web goes toe-to-toe with walled gardens</b>                  | 11 |
| PART THREE:  |    |
| <b>What's on the tech stack shopping list</b>                        | 14 |
| PART FOUR:   |    |
| <b>Data collaboration platforms are marketing's Swiss army knife</b> | 18 |
| <b>Conclusion</b>  | 21 |
| <b>Methodology</b>   | 22 |
| <b>About Lotame</b>  | 23 |
| <b>About Cint</b>  | 24 |

# Introduction

Total global advertising spend is predicted to top **\$1 trillion** for the first time in 2025. This quarter-century milestone is so vast it requires cosmic scale to measure: lay one trillion dollar bills in a line and you could reach the sun with a few million dollars to spare. But down here on Earth, this record spending masks shifting foundations in data maturity.

We're decades deep into the age of Big Data, with AI both exciting and shocking the world with the possibilities of large-scale number crunching. However, marketers and agencies are still struggling to orchestrate and activate data both inside and outside their organizations.

This was true back when Lotame did its last major research series, '**Beyond the Cookie**', which concluded in 2022. Since then, the more things have changed, the more they've stayed the same in some significant ways. Marketers still long for the holistic view of the consumer, made more difficult by joining the dots between disparate data points.

However, there has been one saving grace in the meantime: the emergence of data collaboration platforms. As you will discover below, marketers and agencies alike have enthusiastically embraced the broad use cases of this nascent technology, and are perfectly suited to the portfolio approach that has become the new norm in identity resolution.

**"Data collaboration uses technology to combine and analyze data sets within an organization or with partners to enable a wide range of use cases, from uncovering new consumer insights and enabling accurate cross-screen measurement to expanding reach and creating brand-building media networks."**

— IAB



# Key Takeaways



- 1** Regarding third-party cookies, this survey was conducted prior to Google's announcement that after years of kicking the can down the road, full deprecation was, in fact, not happening, at least not by their own hand. This will offer some temporary relief to the substantial portion of marketers and agencies we found to still be heavily reliant on these cookies, and a partial win for the many who predicted that only limited deprecation was in the cards.
- 2** Data challenges are ubiquitous, with 98% of marketers and agencies encountering barriers in data orchestration and utilization. The primary struggles include finding quality sources/partners and dealing with the limitations of first-party data, which often fails to provide comprehensive insights.
- 3** Despite these struggles, marketers and agencies aren't giving up, with 70% of respondents recognizing the urgency of leveraging first-party data. However, the nature of this first-party data — primarily using unstable identifiers alone like email addresses and mobile IDs — exacerbates issues, leading many to consider data collaboration as a solution.
- 4** There is ongoing reliance on third-party cookies, but marketers and agencies haven't rested on their laurels and have embraced a portfolio approach to identity solutions, utilizing multiple options in tandem to maximize reach with no clear frontrunner — good news for the health of the market.



**5** Programmatic spending showed a continued decline, with 55% of marketers anticipating a reduction. Surprisingly, spending forecasts are almost evenly split between walled gardens and the open web, despite the former being perceived as more attention-grabbing.

**6** Technological investments are set to surge, with nearly all respondents planning to adopt new marketing and data technologies. This marks a significant shift from 2022 and lays the groundwork for a spending spree, particularly in marketing automation and data collaboration platforms. However, the retirement of analytics platforms and query clean rooms signals ongoing challenges in data management, where issues around consistency and accessibility remain critical.

**7** Clean rooms, while widely utilized, are facing scrutiny due to high costs and technical challenges, particularly in scaling with authenticated IDs. Agencies, in particular, express dissatisfaction with clean rooms' capabilities, citing limited data collaboration functionalities.

**8** Conversely, data collaboration platforms are gaining traction, offering a versatile solution with a broad set of use cases and tangible outcomes, such as improved audience targeting and enhanced personalization.

**9** Overall, while the digital marketing sector continues to grapple with stubborn and significant data challenges, there is a clear trend towards adopting collaborative and versatile data technologies to overcome these barriers, gain a holistic view of consumers, and drive marketing growth.



# Something is rotten in the state of data



## Challenged by data? You're not alone

Challenges with data are ubiquitous among today's digital marketers and agencies, with 98% citing some form of barrier. More than half (54%) struggle to find quality data sources, while a similar proportion find their first-party data offers a limited perspective (46%) or doesn't provide deep insights in isolation (45%).

Agencies struggle more than marketers across all challenges presented and cite 3 on average compared to marketers' 2.6, with notably higher rates of agencies butting against internal data silos and targeting cookieless audiences. It seems the more complex organizational structures of agencies compared to marketers are introducing data inefficiencies, which would be solved with a more collaborative internal data structure.

98% of marketers and agencies globally face challenges with data.

### What challenges do you have around data?

|   | Marketer | Agency |
|---|----------|--------|
| Finding quality sources/partners for data enrichment, collaboration or modeling | 53%      | 57%    |
| First-party data collection tells a skewed or limited story                     | 43%      | 49%    |
| Gaining deeper insights based on first-party data alone                         | 44%      | 48%    |
| Using internal data for personalization   | 42%      | 47%    |
| Internal data silos prevent accessing a comprehensive customer view             | 35%      | 44%    |
| Audience targeting in a cookieless world  | 37%      | 43%    |

Source: The State of Data Collaboration, Lotame | Cint, 2024

Those challenges differ across regions with LATAM and APAC facing greater difficulties with first-party data's limits.

### Country Breakdown of Data Challenges

1 is the Greatest Challenge, 5 the Least

|   | NA | UK | MX | BZ | SG | AU |
|---|----|----|----|----|----|----|
| Finding quality sources/partners for data enrichment, collaboration or modeling | 1  | 1  | 1* | 1  | 4  | 1  |
| Gaining deeper insights based on first-party data alone                         | 2  | 2  | 3  | 3* | 3* | 3  |
| Using internal data for personalization   | 3  | 3  | 2  | 4  | 2  | 4  |
| Internal data silos prevent accessing a comprehensive customer view             | 4* | 4* | 5  | 5  | 3* | 5  |
| Audience targeting in a cookieless world  | 4* | 4* | 4  | 2  | 5  | 6  |
| First-party data collection tells a skewed or limited story                     | 5  | 5  | 1* | 3* | 1  | 2  |

Source: The State of Data Collaboration, Lotame | Cint, 2024

\* Repeated numbers reflect equal percentages.

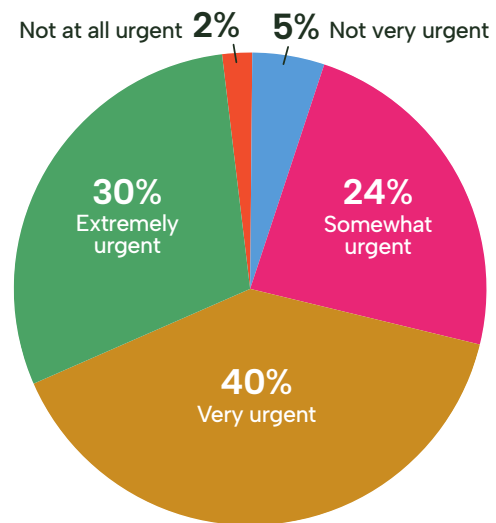
### Plenty of first-party data, but how much is useful?

Given the widespread challenges reported around limited first-party data, it's unsurprising that the majority (70%) of marketers and agencies see first-party data as an urgent or extremely urgent consideration.

**7 in 10 view first-party data collection and activation as an urgent priority.**

The scope and makeup of the first-party data that marketers and agencies have at hand reveals why so many find themselves with a narrow view of their consumers.

### What level of urgency does your business place on collecting & using first-party data to preserve your advertising model in a cookieless future?



Source: The State of Data Collaboration, Lotame | Cint, 2024

Just under half (42%) of respondents have more than half of their first-party data tied to an email or mobile ID, rising to 47% among agencies, who also cited greater first-party data challenges.

Given the unreliability of email addresses and mobile IDs alone as stable, unique identifiers — with the former always subject to issues of scale, user change and hashing errors, and the latter no longer persistent or accessible on iOS — their high rate of use is the likely root cause of many first-party data challenges.

**Data enrichment and AI lead as the top methods to enhance first-party data. Agencies are leaning into all methods.**

Despite their challenges, most (70%) marketers and agencies feel well-resourced to maintain their business outcomes with first-party data, suggesting that the barriers they face are impeding growth rather than stability. Of those that do not feel they

have enough first-party data, almost three-quarters (73%) are very or extremely likely to turn to data collaboration to make up the shortfall.

**What methods are you using or do you plan to use to enhance your first-party data?**

|  | Marketer | Agency |
|--|----------|--------|
| Data enrichment with high-quality sources          | 52%      | 61%    |
| Artificial intelligence                            | 53%      | 50%    |
| Walled garden clean room                           | 43%      | 51%    |
| Data collaboration with another brand or publisher | 42%      | 51%    |
| Machine learning modeling                          | 38%      | 47%    |

Source: The State of Data Collaboration, Lotame | Cint, 2024

Denotes significant difference at the 95% confidence level

**On a regional level, North America, the UK, and Mexico cite data enrichment, data collaboration, and AI as their top 3 methods to enhance first-party data.**



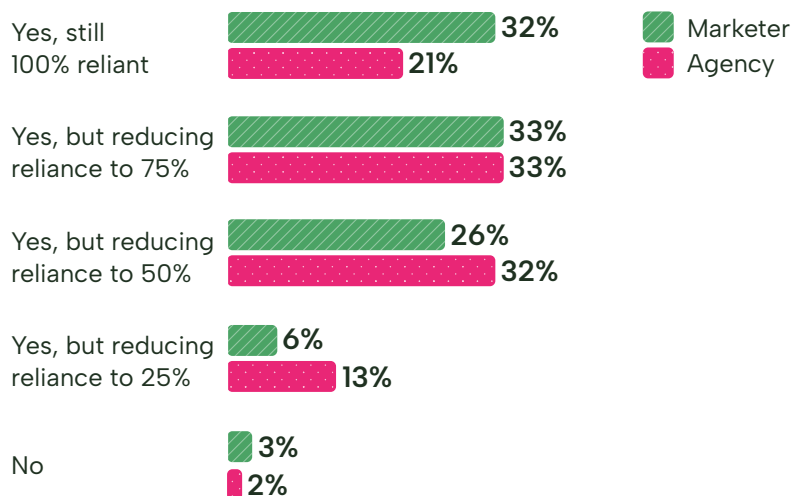
## Third-party cookies: going, going, not gone

When we last surveyed predictions about third-party cookie deprecation for part three of Lotame's 'Beyond the Cookie' series in 2022, 6 in 7 respondents believed Google would sunset third-party cookies. Following repeated delays — and just prior to [Google's announcement](#) that third-party cookies would remain active in Chrome — this dropped to 2 in 5.

The other 3 in 5 who believed third-party cookies would only be partially deprecated were right on the money. This is no doubt a relief for the third (32%) of marketers and fifth (21%) of agencies who are 100% reliant on third-party cookies, and the third (33%) of marketers and agencies who are 75% reliant. Only 3% had already phased out third-party cookies, and will reap the benefits of that competitive advantage as consumers make the final call.

2 in 5 believe third-party cookies will be fully deprecated — but a majority intend to keep using them.

### Do you plan to continue using third-party cookies as long as they're available?



Source: The State of Data Collaboration, Lotame | Cint, 2024

### Regional marketers 100% reliant on third-party cookies:

1. Singapore **53%**
2. North America **40%**
3. UK **36%**
4. Brazil **33%**
5. Mexico **24%**
6. Australia **17%**

Source: The State of Data Collaboration, Lotame | Cint, 2024

“The industry will likely end up in the same place. We’re just taking a different, potentially longer route to get there. The advertising ecosystem still requires multiple solutions to safely and effectively target consumers, including alternative IDs, server-side solutions, Privacy Sandbox, and cookies. This isn’t materially different from what is happening today, as approximately 25% of the browser market is already cookieless, which requires solutions.”

— [Anthony Katsur](#), CEO at the IAB Tech Lab

After many years of urging marketers and agencies to adopt cookieless solutions, it’s not surprising to see such deeply embedded dependency, though statistics like these also likely played a role in Google’s decision. However, those most reliant on third-party cookies cannot be complacent. At the time of writing, we don’t yet know what revised form third-party cookies will take in Chrome, but current expectations are for browser-based consent controls that will significantly reduce their scale and applicability. For example, Apple Tracking Transparency (ATT) has resulted in an **80% opt-out rate in some countries**.

### Which ID solutions are being utilized? All of them!

Throughout the gradual decline of third-party cookies, there has always been the question of which identity solution would rise in their place. Instead, marketers and agencies have embraced a portfolio approach, mixing and matching solutions to maximize reach and adaptability. The success of multiple approaches to identity is evidence of a healthy ecosystem where competition and innovation can thrive.

**Agencies embrace identity portfolio with greater use of universal IDs and identity graphs.**

Despite the continued reliance on third-party cookies, all ID solutions saw uptake between a quarter (26%) and a third (34%) of respondents, with marketers using at least 2.6 solutions in tandem while agencies lean in for more at 2.9. Agencies — likely due to greater resources — see higher utilization across the board, with particularly large peaks in the use of universal IDs and owned or third-party identity graphs.

#### Which of the following identity approaches has your organization adopted?

|   | Marketer | Agency     |
|---|----------|------------|
| Audience activation using an authenticated ID e.g., UID2                      | 32%      | 35%        |
| <b>Audience activation using a universal ID e.g., Lotame Panorama ID</b>      | 32%      | <b>38%</b> |
| Hybrid identity resolution using our own identity graph                       | 30%      | 37%        |
| <b>Deterministic identity resolution using our own identity graph</b>         | 28%      | <b>38%</b> |
| <b>Predictive identity resolution using our own identity graph</b>            | 29%      | <b>38%</b> |
| Hybrid identity resolution using another organization’s identity graph        | 28%      | 34%        |
| Predictive identity resolution using another organization’s identity graph    | 24%      | 31%        |
| Deterministic identity resolution using another organization’s identity graph | 23%      | 29%        |

Source: The State of Data Collaboration, Lotame | Cint, 2024

# Open web goes toe-to-toe with walled gardens

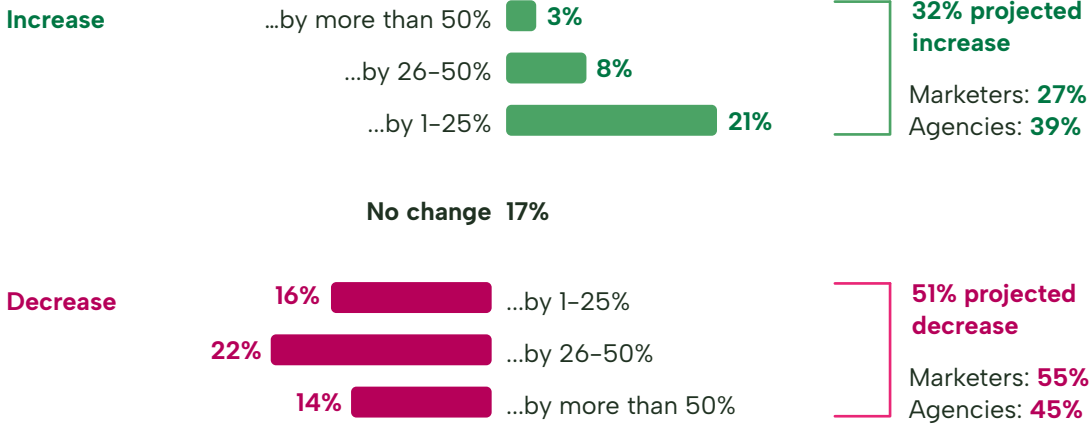
## Painful projections for programmatic spend

In the third part of Lotame's ['Beyond the Cookie' series](#) in 2022, 54% of marketers predicted a reduction in programmatic spend and only 33% predicted an increase. In a sign of programmatic's long-term decline, these figures are remarkably similar today, at 55% predicting decreased spend and even fewer — 27% — predicting an increase.

Agencies, who weren't differentiated in the 2022 survey, are significantly more balanced in their programmatic forecasts, with a 39% predicted increase and 45% reduction.

### Considering your programmatic advertising budget, what are your projections for spend for the full year 2024?

Projections for programmatic spend a year from now:



Source: The State of Data Collaboration, Lotame | Cint, 2024

# Surprise even split in spend between walled gardens and open web

Perhaps the most surprising result from our survey is the near-identical split between spend forecasted for walled gardens and the open web – welcome news for independent publishers and the ecosystem that supports them.

Marketers and agencies are allocating similar budgets to walled gardens and the open web.

These mirrored budget allocations are even more surprising given that respondents felt that walled gardens capture more attention than the open web, at 56% versus 21%. Clearly, while attention is important, it is far from the only factor that is weighing in on where agencies and marketers are finding their audiences.

## What % of your advertising budget in 2024 is allocated to walled gardens, closed platforms or ecosystems\*?

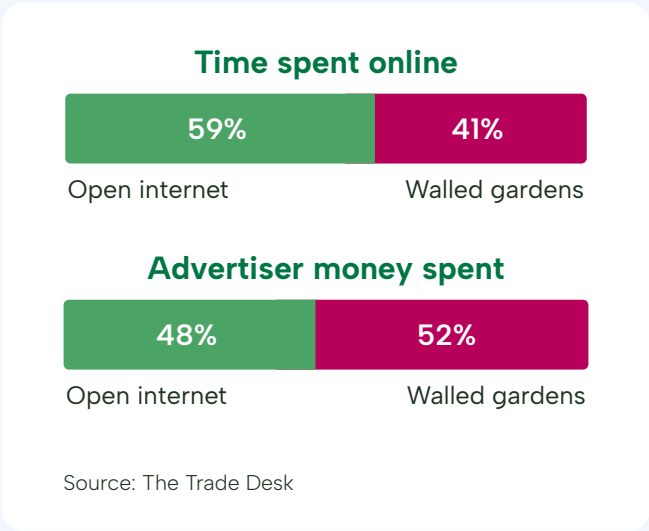
|               | Walled Garden | Open Web   |
|---------------|---------------|------------|
| 100%          | 1%            | 1%         |
| 75-99%        | 0%            | 1%         |
| 50-74%        | 13%           | 9%         |
| <b>25-49%</b> | <b>51%</b>    | <b>50%</b> |
| 1-24%         | 31%           | 35%        |
| 0%            | 4%            | 4%         |

\*For example, Google, Facebook/Instagram, Amazon versus the open web

Source: The State of Data Collaboration, Lotame | Cint, 2024

### IN OTHER WORDS

## Marketers and consumers disconnect on time spent



In the U.S., marketers are enthusiastic about spending ad dollars on social networks, per [eMarketer](#). But consumers are quickly losing interest. Social is commanding a growing share of ad spend while consumer time is on the decline. Meta stands out as the most egregious disconnect between dollars invested and consumer engagement but similar yet inverse disconnects can be seen across CTV.

Further, [The Trade Desk’s research](#) found even more disparity between time spent and ad spend on the open web versus walled gardens.

While open web budgets are already looking stronger than expected, what could be improved to convince marketers and agencies to spend more? No one remedy stood out among respondents, except for agencies' greater demand for transparency in the "taxes" levied on real-time bidding, which makes sense if agencies are also more invested in the programmatic ecosystem and have their own margins to worry about.

What does stand out is that for all the noise about made-for-advertising (MFA) sites in the press — where they seem like an existential threat — their elimination and deterrence came in last for open web priorities for our respondents.

Despite general agreement between agencies and marketers on what would move the needle on open web spending, marketers prioritize ease of curating deals while transparency tops agency wish lists.

### What would entice marketers and agencies to spend more on the open web?

#### Marketers

1. **Ease of curating deals with publishers on high-quality inventory matched with data**
2. Standardized way to connect data into platforms
3. Measurement consistency and standardization
4. Elimination of MFAs
5. Greater transparency into RTB tech tax

#### Agencies

1. **Greater transparency into RTB tech tax**
2. Ease of curating deals with publishers on high-quality inventory matched with data
3. Standardized way to connect data into platforms
4. Measurement consistency and standardization
5. Elimination of MFAs

Source: The State of Data Collaboration, Lotame | Cint, 2024

See our [curation explainer](#) to unpack how it is redefining how ad campaigns are built, bought, and optimized to deliver unmatched outcomes.



# What's on the tech stack shopping list

## On the cusp of a technology spending spree

Marketing and data technology is going to be flying off the shelves soon, with just 1% of respondents not planning on adopting any new martech and just 3% not planning to adopt new data technology. This is a significant change from 2022, when 11% were not planning on investing in any of the listed technologies, and not one category broke 50% planned adoption.

Marketers and agencies are leaning into adopting multiple technologies in the immediate future, while 20% plan on retiring pieces of the tech stack that have outlived their value.

Except for query clean rooms, all technologies presented to respondents saw more than 50% planned uptake. Within martech, marketing automation platforms lead the pack, while data collaboration platforms take the top spot in data solutions. The common theme among these top contenders is again orchestration and activation.

Of the clean rooms, data warehouse varieties saw the most interest, demonstrating that the technology is most attractive when incorporated as a “value add” to existing data infrastructure. Agencies are significantly more inclined towards walled garden clean rooms — which offer no data portability and are exclusively a one-sided exchange — than marketers.

### What technologies do marketers and agencies plan on adopting in the next 6 months to a year?

#### Data

|                             |     |
|-----------------------------|-----|
| Data collaboration platform | 62% |
| Data warehouse clean room   | 60% |
| Walled garden clean room    | 48% |
| Query clean room            | 46% |
| None                        | 3%  |

#### Martech

|                               |     |
|-------------------------------|-----|
| Marketing automation platform | 64% |
| Digital experience platform   | 60% |
| Customer data platform        | 58% |
| Analytics platform            | 56% |
| None                          | 1%  |

Source: The State of Data Collaboration, Lotame | Cint, 2024

## Time's running out for analytics platforms to prove their worth

When looking at which technologies marketers and agencies plan to retire, the results are flipped.

On the data side, query clean rooms — which require the most resource and technical expertise of the options presented — are seeing their challenges reflected in the high rate of retirement, with around a quarter (24%) of respondents planning to phase them out.

As for martech, a fifth (20%) of respondents are planning to retire their analytics platform. This is consistent with trends we identified in our last round of research in 2022, when the rate of planned retirement was a hair higher at 21%. And more recently, Gartner found that 60% of CMOs were planning to halve their analytics departments.

The latest [CMO Survey](#) from Deloitte is consistent with this long-term trend, where despite an increase in martech investment, only just over half of tools already purchased are being used, with insights and analytics posing a particular challenge. Barriers in managing data are standing in the way of realizing martech's potential.

On the flip side, the same challenges with data management that make analytics platforms and query clean rooms a hard sell — such as data being inconsistent across sources, difficult to access, and difficult to manage — are the very same challenges that data collaboration platforms are designed to solve, which likely explains their high uptake and low retirement.

### What technologies do marketers and agencies plan on retiring in the next 6 months to a year?

#### Data

|                             |     |
|-----------------------------|-----|
| Query clean room            | 25% |
| Walled garden clean room    | 22% |
| Data warehouse clean room   | 19% |
| Data collaboration platform | 17% |
| None                        | 15% |

#### Martech

|                               |     |
|-------------------------------|-----|
| Analytics platform            | 20% |
| Digital experience platform   | 20% |
| Customer data platform        | 19% |
| Marketing automation platform | 18% |
| None                          | 13% |

Source: The State of Data Collaboration, Lotame | Cint, 2024

## Analytics platforms' failure to launch

Once again, analytics platforms top the list of pieces of the tech stack marketers plan to retire. If consumer insights are gold to brands, what could be driving this dissatisfaction?

- **Data overload:** the sheer volume of data can make analysis more challenging
- **Siloed data/platform:** fragmentation obstructs the multidimensional consumer view brands covet
- **Pulled focus:** marketers are stretched and lack expertise or time to invest in fluency
- **Evolutionary mismatch:** cookie deprecation has made many tools non-functional

See this [analytics explainer](#) for actionable steps to help optimize your tech stack.

## Do clean rooms give enough bang for marketers' buck?

Zooming in on clean rooms, we see that two in three marketers and agencies currently utilize the technology. Those that plan to phase out their clean rooms are roughly equal in proportion to those that want to introduce them, so it's likely we're currently looking at peak market share — if not a slight decline — for the near future.

The primary usage of clean rooms for marketers and agencies is, unsurprisingly, their *raison d'être*: allowing two different companies to use secure data collaboration for insights or customer intelligence. Agencies make more use of clean rooms across the board, and are also exposed to more of their challenges.

As mentioned when covering the state of analytics platforms above, data and analytics expertise is the most significant challenge to utilizing clean room technology, which also explains why query clean rooms are the first on the chopping block.

The lack of scale achievable with authenticated IDs, which are the primary method for matching across data sets in clean rooms, is also a significant challenge. Think back to how many marketers and agencies have their data tied to an email address or MAID, and it's easy to see why this poses a problem.

Dissatisfaction with clean rooms and their limited lifespan is leading as many organizations to eliminate them as to adopt them in North America and the UK. The inverse is true in greener markets such as Mexico, Brazil, Australia, and Singapore.

### What are the challenges marketers and agencies have experienced using clean rooms?

|                                     |     |
|-------------------------------------|-----|
| Data and analytics expertise        | 38% |
| Scale of authenticated declared IDs | 38% |
| Privacy                             | 32% |
| Lack of data overlap                | 32% |
| Staleness of emails                 | 30% |
| Budget                              | 29% |

Source: The State of Data Collaboration, Lotame | Cint, 2024

### What are marketers and agencies' reasons for not planning to use clean rooms?

|                                     |     |
|-------------------------------------|-----|
| Budget                              | 48% |
| Other                               | 29% |
| Staleness of emails                 | 17% |
| Data and analytics expertise        | 17% |
| Lack of data overlap                | 14% |
| Engineering resources               | 12% |
| Scale of authenticated declared IDs | 5%  |

Source: The State of Data Collaboration, Lotame | Cint, 2024

For those who are either phasing out or plan not to use clean rooms, budget is the biggest in their decision by a wide margin, with almost half (48%) citing this reason. This has only dropped slightly since 2022, when 58% of clean room skeptics cited the same objection.

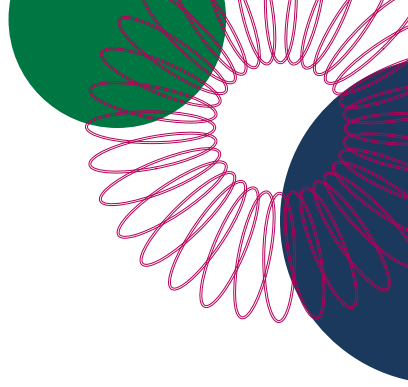
Clean rooms' often onerous price tags also crop up when we look at marketer and agency perceptions of clean rooms, where just over a fifth (22%) of respondents stated they are most suited to enterprise brands with large budgets, and a similar proportion (20%) saw them as requiring engineering and data science support.

Marketers and agencies see data clean rooms as “for enterprise brands” due to the budget barrier. Lack of support for greater data collaboration capabilities followed.

Agencies — who also have the most hands-on experience with clean rooms — stand out for dissatisfaction in their capabilities, with a quarter (24%) believing that they do not offer the full spectrum of data collaboration capabilities that are available today. Clean rooms provide a standalone output, which then must be ported to other platforms for further enrichment, analysis, and activation.

See this [clean room explainer](#) to unpack the different types and their pros and cons.

# Data collaboration platforms are marketing's Swiss army knife



## Data collaboration adoption and utilization soars

As a nascent technology, there are varying definitions on what exactly a data collaboration platform is. To ensure all respondents were on the same page, we presented them with the following IAB definition:

“Data collaboration uses technology to combine and analyze data sets within an organization or with partners to enable a wide range of use cases, from uncovering new consumer insights and enabling accurate cross-screen measurement to expanding reach and creating brand-building media networks.”

— IAB

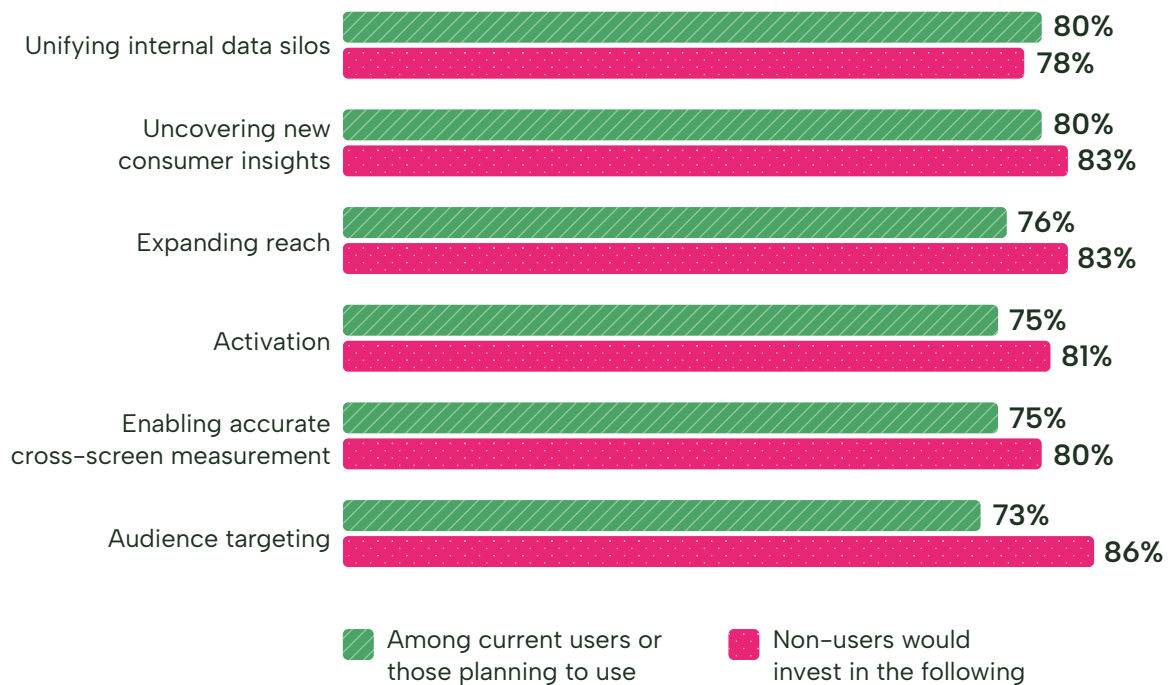
Despite only emerging as a category in the last couple of years, data collaboration platforms are already matching clean rooms in adoption. Here, perhaps because of the lower barrier to entry, we see marketers leading in uptake compared to agencies at 71% versus 64%. Like clean rooms, the rate of planned adoption and retirement roughly cancel each other out.

True to IAB's definition, data collaboration platforms' wide range of use cases are in full display in our survey, with only a 7% range between the most and least used features. Though audience targeting comes in last, it is still utilized by just shy of three-quarters of respondents, while “unifying internal data silos” and “uncovering new consumer insights” lead at 80% respectively with no difference between marketers and agencies.

Marketers (71%) are more likely to use data collaboration technology than agencies (64%), except in North America where agencies (80%) lead uptake over marketers (66%).



### With the IAB definition in mind, which data collaboration use cases are most fruitful or appealing?



Source: The State of Data Collaboration, Lotame | Cint, 2024

There is equal appetite to explore the full suite of data collaboration platform features among those who haven't used them yet. In a reverse of current utilization statistics, audience targeting is the most popular use case, though once again we see a very narrow range between top and bottom. Clearly, the adaptability and versatility of such platforms is a significant draw for current and prospective adopters.

**Unifying data silos and uncovering new consumer insights – key to data orchestration – pop as key data collaboration use cases among current users or those who plan to. Conversely, those not using data collaboration are most likely to invest in audience targeting and expanding reach.**

## How do you feel a data collaboration platform has changed or would change the way you do things?

1. Improve audience targeting by creating a more comprehensive view of the consumer
2. Enhance personalization at a more granular level with access to richer data sets
3. Expand reach by collaborating with other organizations to access new audience segments
4. Better attribution modeling by integrating data across the customer journey
5. Mitigation of data privacy concerns by adhering to privacy by design principles

Source: The State of Data Collaboration, Lotame | Cint, 2024

Utilization is one thing, results are another. Data collaboration platforms are providing tangible outcomes for those who use them, with respondents selecting an average of 2.1 positive changes to their marketing operations.

Improved audience targeting — a major boon in this era of signal loss and siloed data — is the most reported benefit at 44%, with enhanced personalization and expanded reach following closely at 42% and 41%. The least reported benefits are better attribution modeling and mitigated privacy concerns, which still command a respectable 38% each.

See this [data collaboration explainer](#) to understand how to unlock the full potential of customer data to achieve business outcomes.

# Conclusion



In the two years since Lotame concluded its **'Beyond the Cookie' research**, it's a relief to see that the doom and gloom of the pandemic years has finally dissipated. Inflation is falling, cost-of-living is stabilizing, and consumer confidence is on the upswing in many territories.

This optimism has spread to marketers and agencies, as well. We see it in marketing budgets being revised upwards towards next year's forecasted \$1 trillion global ad spend milestone, as well as in the near-unanimous plans to increase technology investment.

There has also been a realization that a rising tide lifts all boats, with winner-takes-all competition softening into mutually beneficial "co-opetition". Brands, publishers, agencies, platforms, and various other ecosystem stakeholders are seeing the limitations of becoming mini walled gardens and are opening their data borders to strategically advantageous guests.

Technology's role in this mindset shift can't be understated, as soon we might be able to file longstanding problems preventing internal and external data cohesion under "solved". Data collaboration platforms have proven themselves to be a Jack of all trades and a master of them too, with widespread utilization of their many features delivering multiple tangible improvements.

But don't just take our word for it. We'll give the final say to Juan Mendoza, CEO of 'The Martech Weekly':

"What we're seeing with DCP's (data collaboration platforms) is an attempt at something CDP's (customer data platforms) or DCR's (data clean rooms) could never do: make all of these different closed ad networks play nice with how data is shared, identity is managed, and how analytics is done. DCR's are one piece of the puzzle, but their role is to safely, privately, and securely share data from point A to point B and are often limited in scale and variety of partners. . . It's about building towards a vision where marketers don't have to pick and choose between IDs. Interoperability is the holy grail of the future of data-driven advertising, and DCP's are the closest attempt so far at it."

— [Juan Mendoza](#), CEO of The Martech Weekly

# Methodology

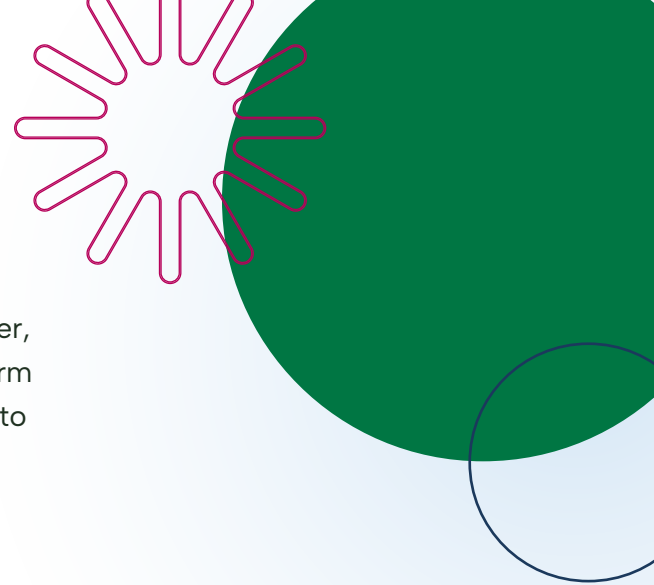
Lotame commissioned industry research into how marketers and agencies are addressing data challenges and opportunities in a post-cookie digital advertising landscape. Cint, a digital insights and research technology leader conducted the global online survey. Cint surveyed more than 1,200 industry professionals, marketers and agencies, across six global markets in June–July 2024: Australia, Brazil, Mexico, Singapore, UK and North America.

The survey asked key questions tailored to marketers and agencies and joint questions, to look at:

- The state of data with and without cookies
- Advertising investment in walled gardens vs. open web
- Evolution of a next-gen tech stack
- Data collaboration understanding and penetration



# About Lotame



Lotame is a technology company that makes data smarter, faster, and easier to use for digital marketers and agencies. Our platform and audiences empower thousands of marketers and agencies to access, analyze, and activate the data they need to understand and engage consumers. Our proven commitment to industry interoperability, connectivity, and privacy help drive successful business outcomes for companies on their terms.

Lotame is headquartered in the United States and serves global clients in North America, Latin America, Europe, Middle East, Africa, and Asia Pacific.

Learn more at [lotame.com](https://lotame.com).

## PLATFORM

**Understand customers better, deliver the business outcomes you're on the hook for**

There's good data across your organization, if only marketers could unlock it. Spherical data collaboration platform helps marketers access, analyze, and activate audience data for unlimited addressability and unfettered performance. Meet audience activation with no expiration on effectiveness.

[More on Spherical](#)

## AUDIENCES

**Address your full audience, acquire high-value customers**

There are untold customers for your products and services, if only marketers could reach (more of) them. Lotame's Curation solution helps marketers and agencies get closer to closing your entire audience. Reverse your brand's fortunes and smash KPIs with Lotame's Data Empowered PMP packages.

[More on Curation](#)



# Cint

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brand lift studies in  
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