



# Rethinking Digital Marketing in a Post-Cookie Era

Key Takeaways from a Global CMO Survey



Research  
Powered  
Content

In partnership with



# Contents

- 3 Foreword by Relay42
- 4 Executive summary
- 6 Digital Marketing Maturity Model
- 7 Introduction – the strategic challenge and the new ‘joined-up’ normal
- 11 How prepared do businesses think they are for the post-3PC world?
- 21 Zero- and first-party data – a key enabler and a critical resource
- 31 Customer journey mapping – a planning ‘super-power’
- 34 Personalization – the right person, not the right segment
- 38 Recommendations – How to thrive in the post-cookie world
- 39 Appendix



# Foreword by Relay42

**Tomas Salfischberger**  
Founder & CEO, Relay42



The cookieless world is steadily and inevitably approaching, heralding one of the most profound transformations in the three-decade history of digital marketing. As the countdown to the complete demise of third-party cookies continues, it is imperative for businesses to take the necessary steps to prepare their acquisition and retention strategies for the upcoming shift.

The deprecation of third-party cookies will impact nearly every aspect of digital marketing, ranging from customer data collection and consent mapping, to the personalization of owned and paid channels, as well as web analytics. The results in this report highlight that the majority of senior marketers recognize the importance of focusing on their first-party data, and are already adopting solutions that prioritize consumer privacy.

We are particularly pleased to see that marketers who have implemented a Customer Data Platform (CDP) are significantly more prepared for this transition and view the change as a positive influence on their business. These businesses can better leverage zero- and first-party data to collaborate with future cookieless advertising solutions, and also demonstrate more advanced capabilities in their use of machine learning, onsite personalization, and customer journey orchestration. Maturity in these disciplines enables these businesses to deliver personalized experiences and build stronger relationships with their customers.

The five-step Maturity Model included in the report is an excellent tool for businesses to plot their current capabilities and use it as a framework to understand where they are excelling and to identify areas for improvement in the coming months or years.

Looking ahead, it is important to note that in a cookieless world, there won't be a one-size-fits-all solution. Instead, organizations must equip themselves with a toolbox of solutions to adapt to changing circumstances and emerging technologies. By diversifying their technological capabilities, brands can maintain agility, experiment with different approaches, and find the most effective strategies to achieve their unique business goals.

At Relay42, we are committed to guiding our customers in navigating the changing digital marketing landscape and helping them harness the potential of their customer data to thrive in a cookieless world.

We hope you enjoy reading this report, and that the insights help your business in its transition to the new world of privacy-centric digital marketing.

## Executive summary

The ‘cookiepocalypse’, set to occur in late 2024, is fast approaching. Google will withdraw support for the third-party cookie (3PC) in its Chrome browser, leaving just one browser in 10 able to deliver the functionality that has supported online marketing and advertising since the birth of the commercial internet.

Relay42 commissioned London Research to find out how well-prepared brands are for the challenge of adapting to this new world. Furthermore, the research evaluates the marketing sophistication of companies in terms of data collection, journey orchestration and real-time personalization, to explore how these companies can maintain growth in a cookieless world.

Based on a survey of more than 300 brands, the key findings of this research are as follows:

**Almost three-quarters** (72%) of respondents say the loss of the third-party cookie poses a **major challenge** for their businesses, which will **require a radical change** to their current acquisition and retention strategies.

However, **almost two-thirds** (61%) of respondents see the **move away from third-party cookies as positive**. This reflects their confidence in adapting to the change, but also their understanding of the consumer appetite for greater privacy. Strikingly, those respondents using a customer data platform (CDP) are over **seven times more likely** than non-CDP users to see the move as having a **‘significantly positive impact’** on their business (30% vs. 4%).

CDP users are also nearly **three times more likely to be confident in their data management** (35% vs. 12%) and activation (34% vs. 12%) capabilities. These are the foundational capabilities of modern high-performance digital marketing – and for thriving in a post-cookie world.

Enterprise businesses (defined as those with annual revenues of at least \$500m) **are most likely to be leveraging the combination of zero- and first-party data, customer insights and journey mapping as part of their digital marketing planning**.

**The ability of companies to execute onsite personalization is now on a par with offsite personalization capabilities**. Historically, offsite paid media led the way as Google and Meta had the data and developed the activation capabilities via their respective ad exchange offerings. The emergence of first-party data management capabilities (i.e. CDPs) and personalization/decisioning functionality within owned media components has now closed the gap. Moving forwards, it’s likely that **owned media/onsite personalization will continue to evolve** while offsite/paid media will have to work hard to stand still.

The presence of a CDP is crucial to unlocking the potential of the more advanced analytics of the future; **CDP users are four-and-a-half times more likely to be leveraging AI/machine learning** than non-users, and **six times as likely to be using multi-touch attribution**.

“The main lesson from this study seems to be that CDP users are better at everything (we also suspect that they’re taller, funnier, and earn more money, although that remains unproven). Of course, correlation doesn’t prove causation, so we can’t say this data shows that having a CDP makes those other things possible. But it’s reasonable to conclude that having a CDP is one mark of an exceptionally effective organization. And you can take that one step further to state that people who are good at marketing technology have concluded that a CDP will help them to succeed. That’s endorsement enough.”



**David M. Raab**

Founder and CEO of the Customer Data Platform Institute, a vendor-neutral organization whose mission is to help organizations make the best use of their customer data



CUSTOMER  
DATA PLATFORM  
INSTITUTE

## Methodology

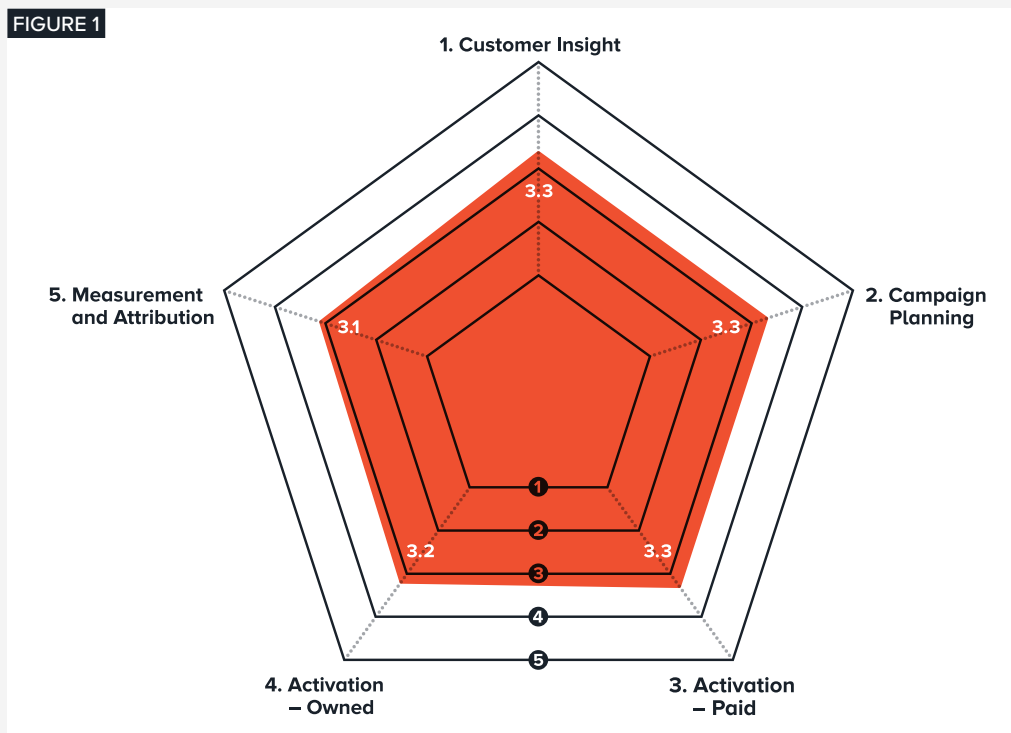
This report is based on a survey of 319 senior marketers working for companies with at least \$10m in annual revenue, carried out in March and April 2023. Around two-thirds of companies surveyed have annual revenues of at least \$100m, and just under a third have revenues of at least \$1bn. The vast majority of respondents are from the UK (40%) or the US (39%). The best-represented business sectors are retail (33%) and financial services (19%). Please see the [Appendix](#) of this report for a further breakdown of survey respondents.

# Relay42 Digital Marketing Maturity Model

We have developed a simple but powerful Digital Marketing Maturity Model to help summarize the findings from this report, and to act as a benchmark for marketers to assess their organization's own capabilities and identify areas with the greatest potential for improvement.

The focus is on the functional dimensions of digital marketing maturity, i.e. the core capabilities underpinning digital marketing excellence. The Maturity Model is structured around the *campaign* lifecycle (rather than the *customer* lifecycle or journey) as we want it to map directly to the operational processes involved in designing and delivering great digital marketing programs.

The macro level view (across all respondents) of digital marketing maturity is summarized in *Figure 1*.



The five dimensions of capability are:

- 1. Customer Insight:** the ability to collect customer data to inform campaign planning and CRM program optimization.
- 2. Campaign Planning:** the ability to use customer journey mapping as a digital marketing program design tool.
- 3. Activation - Paid:** the ability to leverage zero- and first-party data to deliver high-performing acquisition campaigns across paid media channels.
- 4. Activation - Owned:** the ability to leverage zero- and first-party data to deliver high-performing digital marketing campaigns across owned media properties (principally website/ecommerce).
- 5. Measurement and Attribution:** the ability to apply advanced analytics to optimize digital marketing campaign performance across all channels.

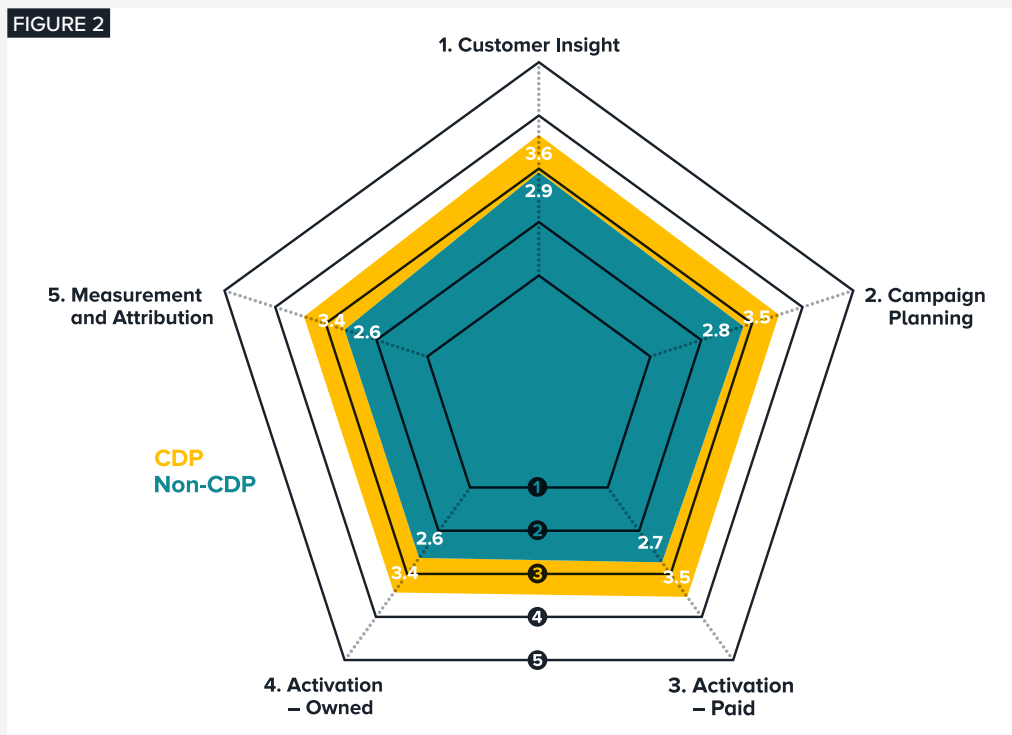
A weighted average of all individual responses was calculated to give an aggregated score out of five for all survey respondents (or any sub-sets thereof).

The five stages of development are:

1. **Generic:** basic, one-size-fits-all approach.
2. **Segmented:** identification and targeting of broad audiences defined by simple/static customer attributes.
3. **Dynamic:** highly responsive targeting of audiences based on behaviors and ‘in-the-moment’ needs and preferences.
4. **Predictive:** the application of advanced predictive models to define future needs and behaviors at key stages in the purchase journey.
5. **Learning:** a highly automated approach to experimentation and the application of machine learning to orchestrate personalized interactions across the entire customer lifecycle/purchase journey and deliver a seamless experience across all channels.

An organization’s maturity level across each dimension can vary. However, there will typically be a broad correlation as competencies in each individual area tend to align so they can work effectively together. We can see this coming through in the maturity profile for all respondents shown below.

A key finding of the research was the extent to which the data management and marketing automation capabilities enabled by a CDP help brands operate higher up the digital marketing maturity scale. This can be summarized neatly using the new Digital Marketing Maturity Model (Figure 2).



The drill-down analysis shows that CDP users (with an average score of 3.48 across the five dimensions of capability) are typically one step more advanced in terms of digital maturity compared to non-CDP users (average score of 2.72).

## Section 1

# Introduction – the strategic challenge and the new ‘joined-up’ normal

Google threw the world of online advertising into uproar in 2020 when it announced plans to withdraw support for the third-party cookie in its Chrome browser.

It wasn't the first company to take such a step; Apple had already done the same with Safari, as had Mozilla with Firefox. But Chrome is the world's most popular browser, with 63.5% market share worldwide in April 2023. Add users of Safari (24.3%) and Firefox (2.77%), and suddenly only one browser in 10 will support the technology that has formed the foundation of online advertising for the past 27 years. The functionality that will be lost includes targeting, measurement, frequency capping, attribution, campaign organization and dynamic creative organization.

Google has subsequently postponed the so-called cookiepocalypse to late 2024. This was partly to work on their own Privacy Sandbox solutions such as Protected Audience API (previously known as FLEDGE), which will allow advertisers to continue to advertise without the use of 3PC, and partly to give businesses more time to prepare for the change. This extra time is clearly necessary, as our research found that less than two years out from Google's deadline, 72% of respondents agreed that the loss of the third-party cookie poses a major challenge for their business, and will demand radical change to their current acquisition and retention strategies.

So, what might this 'radical change' look like?

### **No single replacement technology**

The first thing to note is that there is no single technology or solution that will directly replace the third-party cookie. The future will involve stitching together a number of solutions, with the precise combination depending on the nature of the individual business and their digital marketing focus.

The most popular types of ad solutions that marketers are either already using or looking to invest in are shown in *Figure 3*. Of the technologies already in use, the most popular is GA4, Google's latest analytics product, which is designed to work with or without third-party cookies. It will take marketers time to adapt to the new GA4 product, but they clearly already see it as a 'must have' tool and are actively adopting it. It is already in use by 45% of respondents.

Google's Privacy Sandbox (the umbrella for various post-cookie targeting tools) is less mature and more complex, and is a 'privacy toolkit' rather than a deployable product. Understandably, it's taking time to gain traction, but it's likely to be a key technology component that will see adoption levels similar to GA4. The 27% of respondents who have 'no idea' as to its likely usage would appear to be at risk in this regard.



Contextual advertising is, from a technical standpoint, the simplest, easiest response to the loss of targeting data so it's not surprising that it ranks highly in respondents' current use/immediate plans. The fact that it's only marginally ahead of 'third-party data purchasing' suggests that brands will continue to leverage third-party data until the lights go out. That said, although 'second-party data partnerships' trail current adoption of zero/first-party data tactics, they are starting to be explored by a third of respondents.

It's also surprising, given that 60% of all web searches happen in Google, that over a quarter (27%) of marketers surveyed have no idea about Google's Privacy Sandbox (the company's initiative to "create a thriving web ecosystem that is respectful of users and private by default"). Meanwhile, user ID graphs top the list of things respondents have 'no idea' about (29%).

“Setting aside the CDP lens, perhaps the most dominant impression is uncertainty. Other than Google Analytics 4 at 45%, no advertising solution to the deprecation of third-party cookies is used by more than 38% of respondents or fewer than 26%. This narrow range shows no single clear path forward has emerged.”

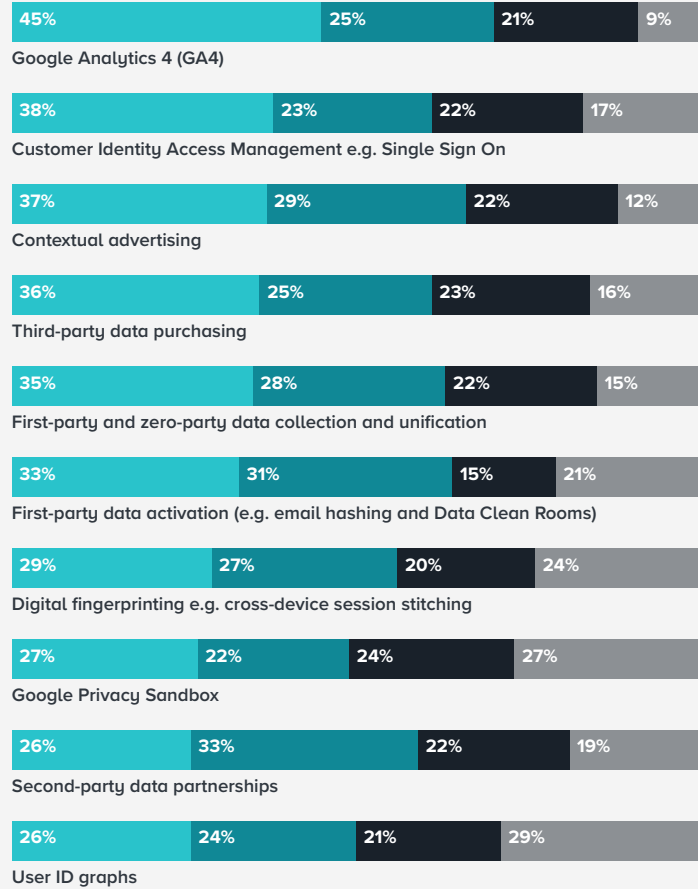
David M. Raab  
Founder and CEO of the Customer  
Data Platform Institute



FIGURE 3

**Which of the following advertising solutions is your business already using in preparation for when third-party cookies are deprecated in Google Chrome in 2024?**

- Already using
- Starting to explore
- Plan to explore
- No idea



45% of companies surveyed are already using GA4 in preparation for the deprecation of third-party cookies in Google Chrome.

<sup>1</sup> The term zero-party data was coined by Forrester in 2018 to distinguish data that consumers voluntarily share with businesses from data that businesses collect about consumers as they interact with the business, for example through websites and apps (i.e. first-party data).

**CDP users are seven times more likely (30% vs. 4%) to believe the demise of the third-party cookie will have a significantly positive impact on their business.**



### **The zero- and first-party data challenge**

It's clear from *Figure 3* that zero-party<sup>1</sup> and first-party data will be crucial to organizations' ability to survive and thrive in the post-cookie world. Despite concerns about data haves and have-nots (principally those B2C brands that sell through intermediaries), the research found that only 5% of respondents had no access to first-party data. However, only 13% are currently able to use and activate their first-party data across both owned and paid channels. This highlights the challenge marketers face in bringing their data together from across the organization to create the single customer view needed for joined-up digital marketing.

It also explains why Gartner, in its [Hype Cycle for Digital Marketing 2022](#), predicted that the technology to facilitate the single customer view – the customer data platform (CDP) – would continue to evolve as a key digital marketing technology in 2023. As Gartner says, "CDP technology is pivotal to multichannel marketing hubs in the short term, and to effective personalization and use of AI in the medium term".

Establishing a single customer view is one of the most difficult technology, data and process challenges for a business, since it often involves breaking down organizational silos. It's therefore potentially one of the greatest barriers to addressing other requirements linked to personalization, measurement and attribution, and to building the capability for centralized customer journey orchestration across all channels and touchpoints.

The underlying importance of a CDP to all this can be seen from the fact that CDP users are seven times more likely (30% vs. 4%) to believe the demise of the third-party cookie will have a significantly positive impact on their business than are non-CDP users. More specifically, CDP users are nearly three times more likely to be confident in their data management (35% vs. 12%) and activation (34% vs. 12%) capabilities compared to non-users. These are the foundational capabilities of high-performance digital marketing; the differences in the numbers highlight the fundamental shift a CDP can deliver.

## Section 2

# How prepared do businesses think they are for the post-3PC world?

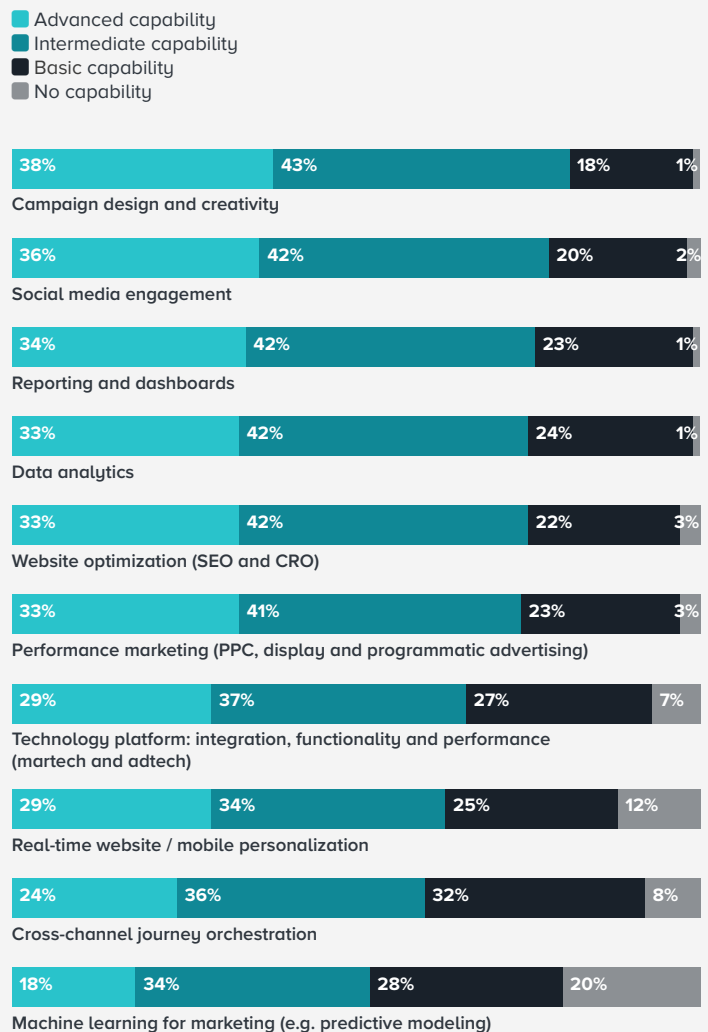
Figure 4 provides a snapshot of how the businesses surveyed for this report feel about their various digital marketing capabilities in the first half of 2023. Unsurprisingly, they're largely comfortable with the well-established disciplines such as campaign design (81% say their capability is 'advanced' or 'intermediate') and performance marketing (74% say the same). They're much less confident in the more complex areas of real-time personalization, cross-channel journey orchestration and machine learning. However, these are exactly the skills that will be required most in the post-3PC era.

A fifth of all businesses have no capability for machine learning and are therefore not deploying this in their marketing programs. At the other end of the maturity spectrum, just under a fifth (18%) say they have advanced capability, a figure that rises only slightly to 21% for enterprise brands (\$500m+ annual revenue companies). Encouragingly, the fact that advanced analytics users aren't more heavily skewed towards big businesses shows that entry barriers (budget, people and technology) have fallen thanks to cloud-based analytics platforms.

Two in five brands say their capability for cross-channel journey orchestration is either 'basic' or 'non-existent', and more than a third (37%) have little or no skill in real-time personalization. The broad correlation across the use of advanced analytics, cross-channel journey orchestration and real-time personalization is not surprising, as these are closely related, interdependent digital marketing disciplines.

FIGURE 4

## How do you rate your organization's digital marketing skills and capabilities in the following areas?



In between the solid expertise at the top of the chart and the rather shakier skills at the bottom lies brands' capability in martech and adtech. A third (34%) have either basic capabilities or none at all, while only a slightly higher proportion (37%) rate their capabilities as advanced. This should also be cause for concern, because solving the challenges that come with the demise of the third-party cookie will require a high level of technological know-how, alongside management skills and organizational smarts.

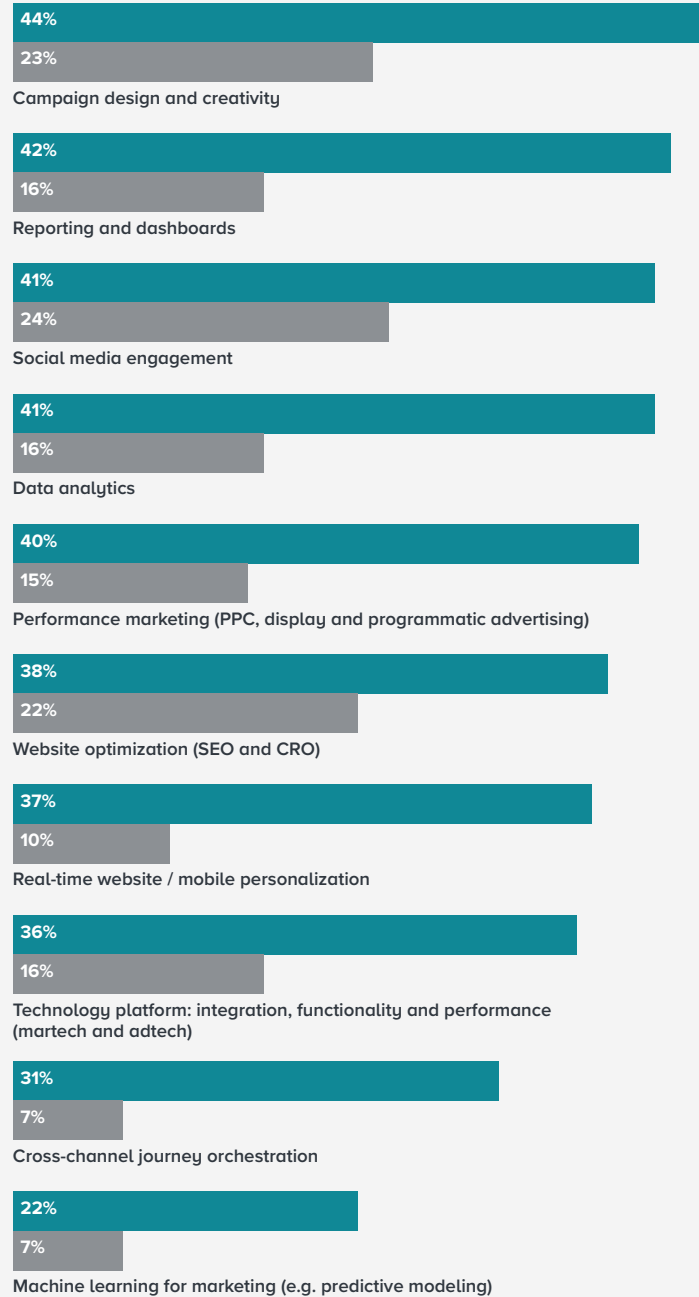
Even more striking are the results of breaking down this data by those businesses with a CDP and those without (Figure 5). CDP users are between one-and-a-half and four-and-a-half times more likely to rate their capabilities as advanced than are non-users. Crucially, the biggest differences are found in the areas most needed to adapt to a post-3PC environment; real-time personalization (4x), cross-channel journey orchestration (4.5x) and machine learning (3x).

CDP users are between one-and-a-half and four-and-a-half times more likely to rate their capabilities as advanced than are non-users.

FIGURE 5

**Proportion of organizations rating their digital marketing skills and capabilities in the following areas as advanced (CDP vs. non-CDP)**

■ CDP users  
■ Non-CDP users



The research also looked at how respondents rate their current technology capabilities (*Figure 6*). This shows marketers feel they're at their weakest when it comes to having a single customer view supporting their digital marketing; less than a quarter (22%) describe their capability as advanced. In addition, almost a third (32%) say they only have basic capabilities in centralized journey orchestration across all their channels and touchpoints. These are potentially some of the hardest technology, data and process pieces to bring together due to organizational silos, and therefore potentially the biggest barriers to solving other requirements linked to attribution, measurement and personalization.

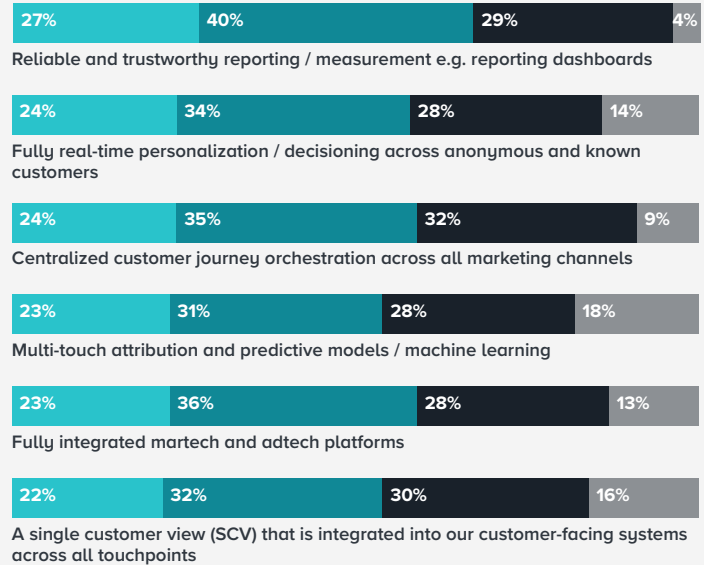
Looking at this through the lens of CDP usage, it's clear to see the breadth and scale of the impact that the technology has on an organization's ability to operate at the top end of the digital marketing maturity spectrum. *Figure 7* compares the extent to which companies with and without CDPs have advanced capabilities across different dimensions of digital marketing. What's striking is that the difference between the two is most marked in the areas of greatest complexity (and potential reward), i.e. advanced personalization (31% vs. 7%) and analytics/machine learning (31% vs. 5%).

How prepared do businesses think they are for the post-3PC world?

**FIGURE 6**

**How would you classify your current technology capabilities in the following areas?**

- Advanced capability
- Intermediate capability
- Basic capability
- No capability



Less than a quarter (22%) of companies have a single customer view across all touchpoints.

**Adtech and martech – two become one?**

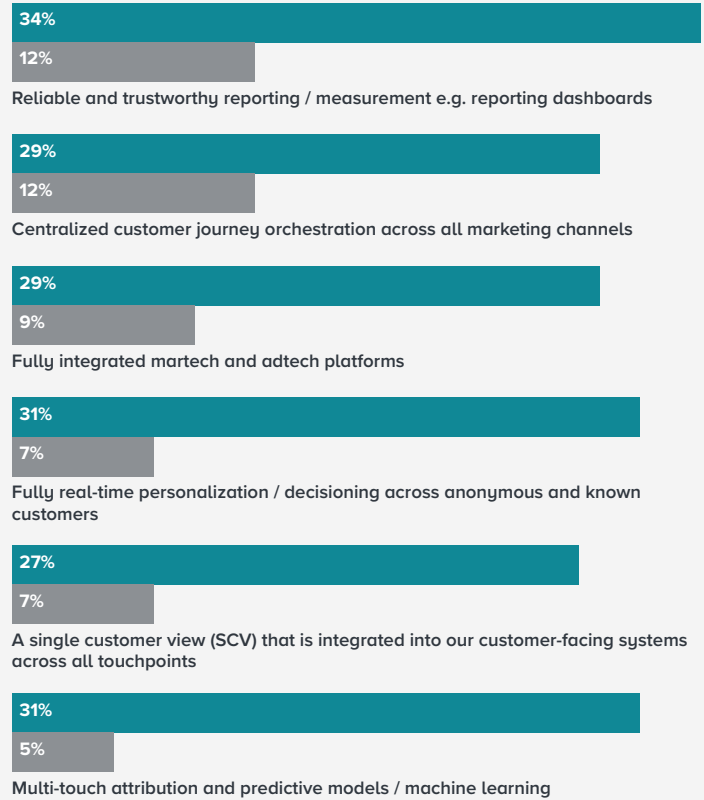
A further point is that, over the years, adtech and martech solutions have been siloed in different departments, leading to fragmented customer experiences and arguments over attribution. We're now seeing DMPs being re-engineered to start using email hash or profile-based IDs, while at the same time martech solutions (i.e. CDPs) are starting to provide more valuable connections to DSPs and social platforms. This is creating more overlap between the two sets of systems than ever before, with the result that organizations need to evaluate their current tech stack, processes and organizational structures to ensure they're fit for purpose in the post-3PC world.

However, this thinking is still in its early stages. As Figure 6 also shows, less than a quarter of respondents (23%) describe their technology for fully integrated martech and adtech platforms as advanced.

**FIGURE 7**

**Proportion of organizations rating their current technology capabilities in the following areas as advanced (CDP vs. non-CDP)**

■ CDP users  
■ Non-CDP users



CDP users are more than four times as likely to have real-time personalization and decisioning capabilities across anonymous and known customers.

### Are you ready for the new era of digital marketing?

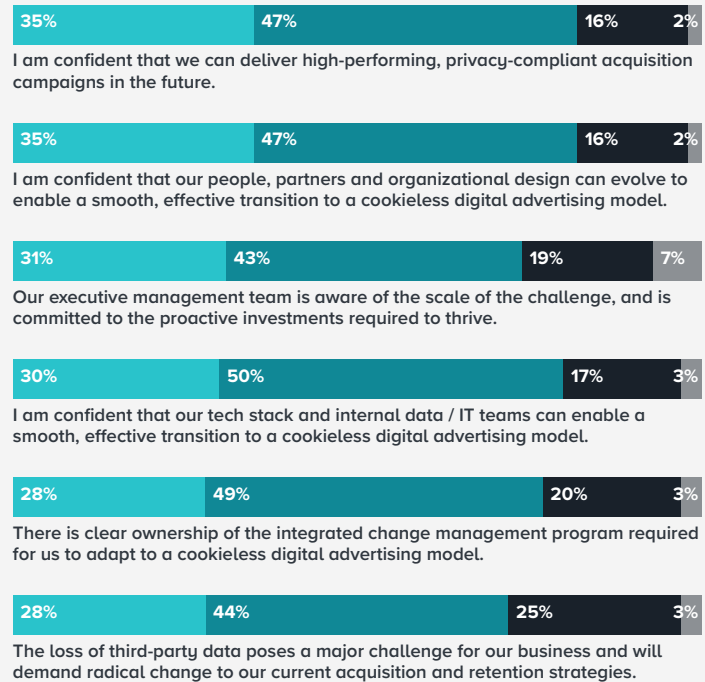
Shortly after Google's 2020 announcement about third-party cookies in Chrome, IAB Europe conducted a survey of digital industry attitudes to the move. Only just over a quarter of respondents (28%) felt they were either 'very' or 'quite' prepared for the post-cookie world.

Fast-forward three years, and our research shows attitudes have changed significantly (Figure 8). As noted earlier, 72% of marketers agree that the loss of third-party cookie data will be a major challenge for their acquisition and retention strategies. However, confidence is high that their businesses will adapt (82% agree), that there is a focus on the problem from senior exec levels (74% agree), and that their tech stack and IT teams can deliver a smooth transition to a cookieless advertising model (80% agree).

FIGURE 8

#### To what extent do you agree or disagree with the following statements relating to your organization's preparedness for the implications of impending changes to third-party cookie technology and media?

- Strongly agree
- Somewhat agree
- Somewhat disagree
- Strongly disagree



82% of respondents agree that they can deliver high-performing, privacy-compliant acquisition campaigns in the future.



### Inspiring confidence in IT and management

Strikingly, respondents who use a CDP are three and half times more likely than non-users (38% vs. 11%) to strongly agree their tech stack and internal IT are well-placed to pivot to, and thrive in, a world without cookies (Figure 9). CDP users are also three-and-a-half times more likely than non-users (39% vs. 12%) to strongly agree their executive management team understands the challenge of moving to a post-3PC future, and are committed to investment to address it.

Given the time and money involved in moving to a CDP, it's not surprising that organizations that have done so credit their exec management team with a high level of understanding of the need for this investment.

The impact of this on an organization's overall attitude can be seen in Figure 10. Two-thirds (69%) of CDP users see the demise of third-party cookies as having a positive impact on their marketing. More than this, CDP users are seven times more likely than non-users to think the change will have a 'significant' positive impact on their marketing activities. In comparison, more than half (59%) of non-CDP users expect the change to have a negative impact.

CDP users are seven times more likely than non-users to think the demise of third-party cookies will have a 'significant' positive impact on their ability to achieve their marketing goals.

FIGURE 9

#### Proportion of organizations strongly agreeing with the following statements relating to their preparedness for the implications of impending changes to third-party cookie technology and media (CDP vs. non-CDP)

■ CDP users ■ Non-CDP users



I am confident that our people, partners and organizational design can evolve to enable a smooth, effective transition to a cookieless digital advertising model.



I am confident that we can deliver high-performing, privacy-compliant acquisition campaigns in the future.



Our executive management team is aware of the scale of the challenge, and is committed to the proactive investments required to thrive.



I am confident that our tech stack and internal data / IT teams can enable a smooth, effective transition to a cookieless digital advertising model.



There is clear ownership of the integrated change management program required for us to adapt to a cookieless digital advertising model.



The loss of third-party data poses a major challenge for our business and will demand radical change to our current acquisition and retention strategies.

FIGURE 10

#### What impact do you expect the demise of third-party cookies to have on your organization's ability to achieve its marketing goals? (CDP vs. non-CDP)

■ CDP users ■ Non-CDP users



Significant positive impact



Somewhat positive impact



Somewhat negative impact



Significant negative impact

**CDP users face the future with assurance**

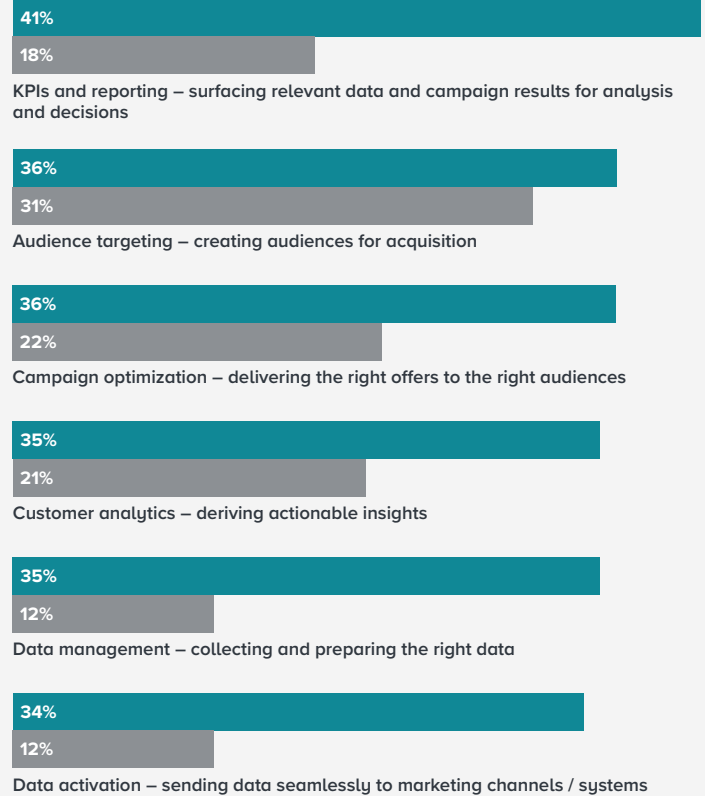
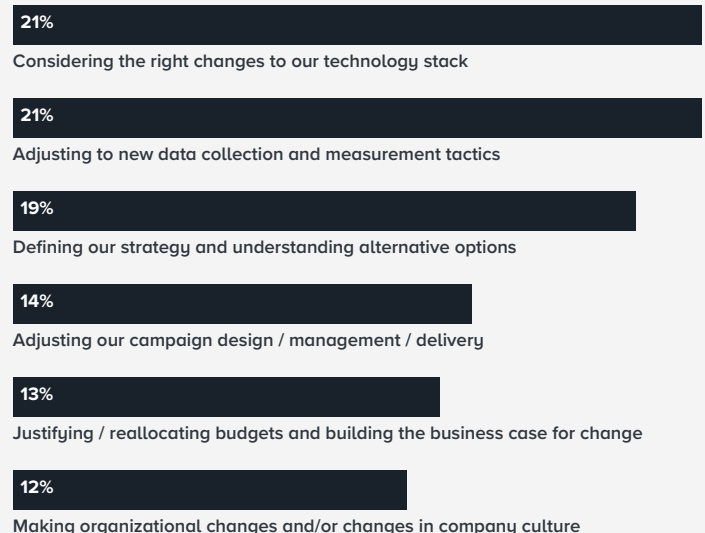
Figure 11 looks at how organizations feel about their specific data capabilities post-3PC. CDP users are far more confident in their ability to respond to the loss of third-party cookies than non-CDP users. They're almost three times more prepared to continue to activate data and send it seamlessly to marketing channels, three times more prepared to be able to continue collecting the data they need, and twice as confident that they'll be able to continue providing relevant data for campaign reporting and decision-making.

The biggest adaptations that marketers expect to have to make when facing the demise of third-party cookies are changes to their tech stack and adjustments in their tactics around data collection and measurement (Figure 12, both cited by 21% of respondents). A more fundamental change – defining a new strategy and understanding alternative options – is seen as the greatest challenge by 19%.

Changes to the tech stack  
and adjustments in data  
collection and measurement  
tactics are the greatest  
challenges companies face.

**FIGURE 11****Proportion of organizations feeling very confident to respond to the loss of third-party cookies in the following areas of their business (CDP vs. non-CDP)**

■ CDP users ■ Non-CDP users

**FIGURE 12****What is the greatest challenge your organization faces in trying to adapt to the demise of third-party cookies?**

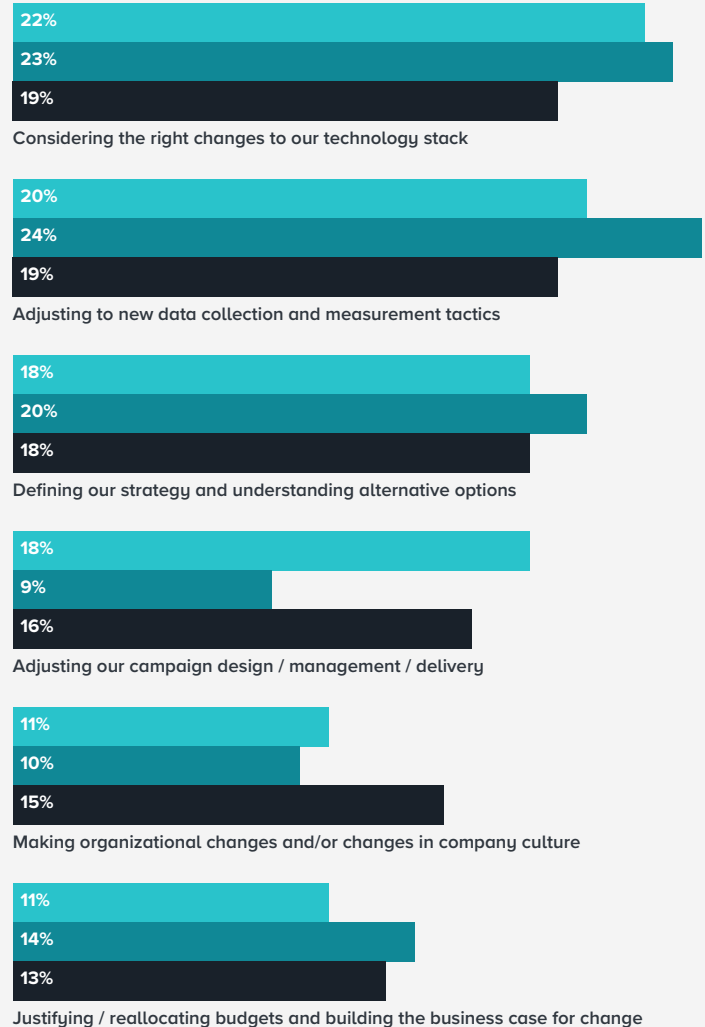
What's striking here is the similar weight given to each individual challenge, which is broadly repeated across business sizes (Figure 13). This shows the overall transition is a complex, multi-dimensional affair, and that there is no silver bullet. Large businesses have the resources and budgets but must tackle the complexities of scale. Smaller businesses have a simpler challenge than the big beasts, but less resources to throw at it. All organizations, regardless of size, need a highly integrated approach, driven from the top and supported by cultural change, investment in technology, and relevant IT and data expertise.

The largest organizations  
are most likely to struggle  
with organizational and  
cultural changes.

FIGURE 13

**What is the greatest challenge your organization faces in trying to adapt to the demise of third-party cookies?**  
(split by business size)

- Less than \$50m
- \$50m-\$500m
- More than \$500m



**Is measurement getting enough attention?**

July 1, 2023 is a critical date for many businesses for exactly that reason. This is when Google is due to switch off Universal Analytics, and make GA4 its default analytics tool. According to [the company](#), GA4 “has machine learning at its core to automatically surface helpful insights and gives you a complete understanding of your customers across devices and platforms. It’s privacy-centric by design, so you can rely on Analytics even as industry changes like restrictions on cookies and identifiers create gaps in your data”.

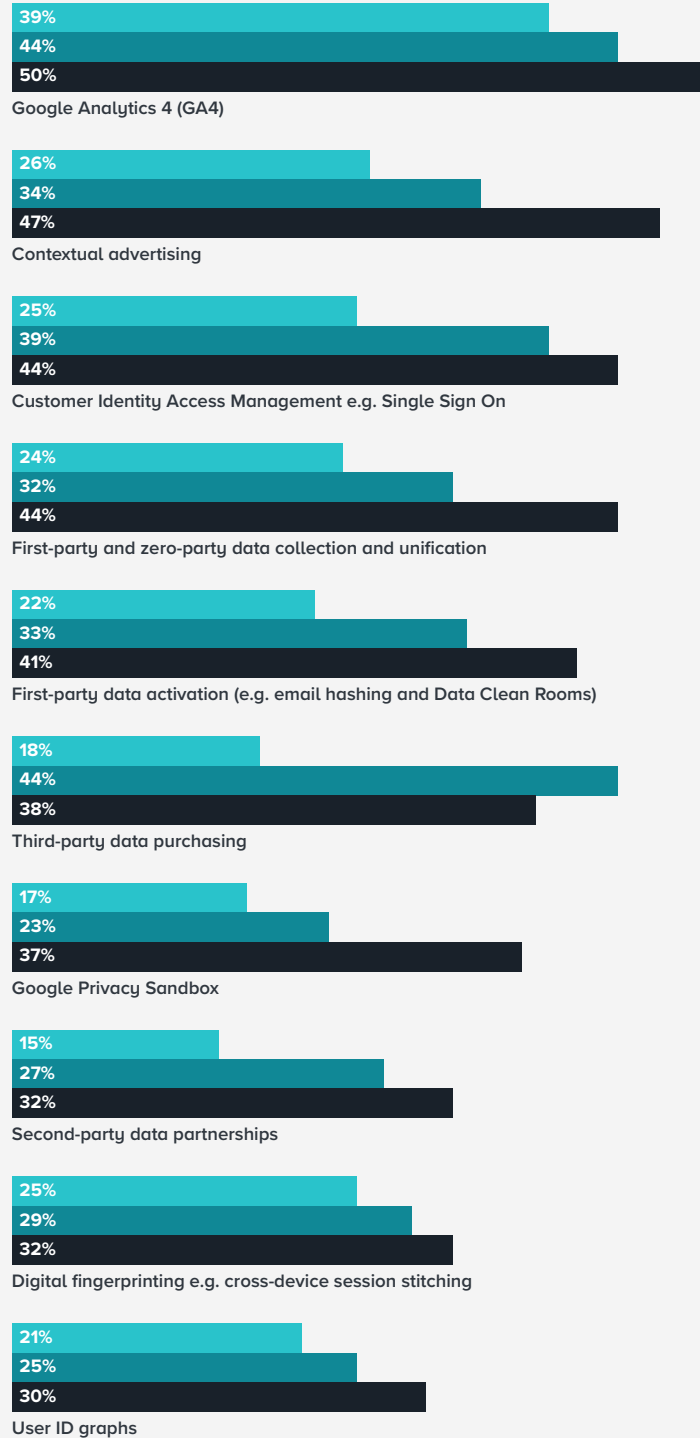
However, 55% of brands have still not completed the move to GA4, and are therefore potentially about to lose a lot of valuable data. Analyzing the data from *Figure 3* by business size shows that larger businesses are leading the way here (*Figure 14*).

The largest organizations are leading the way in their adoption of advertising solutions.

**FIGURE 14**

**Proportion of organizations already using these advertising solutions (split by business size)**

- Less than \$50m
- \$50m-\$500m
- More than \$500m



### Section 3

## Zero- and first-party data – a key enabler and a critical resource

Google’s decision to end support for the third-party cookie was greeted with a scramble among businesses of all kinds to improve their collection and use of zero- and first-party data. This ‘owned’ proprietary data is now accepted as the cornerstone of digital marketing in the future, whether or not businesses choose to augment it with second-party data partnerships (for example with retailers), or by purchasing third-party data from specialist providers (which is still allowed as long as the providers collect the data in a legally compliant fashion).

As a result, a strategy for zero- and first-party data – and the capabilities to implement that strategy – will be critical to business success.

Figure 15 shows the maturity of survey respondents in their approach to collecting zero- and first-party data. Zero-party data is most often associated with a value exchange between the business and a customer, such as signing up for an email newsletter, completing a survey or maintaining an account profile. However, only 16% of respondents have adopted a ‘conversational’ approach to marketing, which is key to collecting and maintaining the qualitative, emotion-based data points that have the highest chance of enabling the business to empathize and connect with customers at the deepest level.

FIGURE 15

#### What best describes your current approach to active data collection (zero- and first-party data) in the context of customer relationship management?

16%

An always-on, conversational approach to marketing and data is central to our CX, segmentation and marketing strategies. We use data to better personalize to every individual.

26%

We actively solicit customer views, preferences and opinions, and track behaviors (e.g. purchases and owned media interactions) to support more granular segmentation and personalization.

28%

We use simple data collection mechanics (e.g. web forms) and basic behavioral tracking (e.g. website visits or email open history) to build a richer customer profile to support basic segmentation.

22%

We have a registration process and Preference Center that enables our customers to create and maintain their profile beyond basic contact permissions and marketing preferences.

8%

We don’t use zero- / first-party data as part of our marketing programs other than basic contact permissions and marketing preferences.

Only 16% of companies have progressed to an ‘always-on, conversational approach’ to their marketing.

Collecting this type of data isn't technically difficult, thanks to web forms and audience engagement tools. The challenge lies in the interpretation. This sort of data is often transient, contextual or circumstantial, such as likely plans this year or ideal holiday type. To ensure this data is actionable in terms of delivering personalized and emotive experiences, a business needs the right solutions to store, structure, interpret and activate it for each specific individual. This is perhaps why only 16% claim to be using an always-on approach to zero-party data collection, while more than half (54%) rely on behavioral data (from analytics within existing channel tools or via preference centers), or don't use zero/first-party data at all.

Looking at this in more detail, *Figure 16* shows that enterprise brands (\$500m+ annual revenue companies) are significantly more advanced in this area, with 56% deploying active strategies to collect zero-party data for better segmentation and personalization, compared to 37% for mid-sized businesses.

Enterprise companies are significantly more advanced in their approach to active data collection.

FIGURE 16

**What best describes your current approach to active data collection (zero- and first-party data) in the context of customer relationship management?**

(split by business size)

- Less than \$50m
- \$50m-\$500m
- More than \$500m



An always-on, conversational approach to marketing and data is central to our CX, segmentation and marketing strategies. We use data to better personalize to every individual.



We actively solicit customer views, preferences and opinions, and track behaviors (e.g. purchases and owned media interactions) to support more granular segmentation and personalization.



We use simple data collection mechanics (e.g. web forms) and basic behavioral tracking (e.g. website visits or email open history) to build a richer customer profile to support basic segmentation.



We have a registration process and Preference Center that enables our customers to create and maintain their profile beyond basic contact permissions and marketing preferences.



We don't use zero- / first-party data as part of our marketing programs other than basic contact permissions and marketing preferences.

**You have the data, what are you going to do with it?**

The value added by any data collected depends on how it's used. The first step is deriving insights about customers and their behavior (Figure 17).

Only 14% of brands are able to use machine learning/AI to activate customer insights across their owned and paid marketing channels. In comparison, almost half (49%) have basic to mid-level information about their customers, but lack deep behavioral insights.

However, this is another area where CDP users are exploiting a massive advantage (Figure 18). They're four-and-a-half times more likely to be unlocking the potential of AI/machine learning to derive customer insights than are non-users. They are also one-and-a-half times more likely to say they have the tools and capabilities to derive deep behavioral or attitudinal insights (online and offline) on all their customers.

CDP users are four-and-a-half times more likely than non-users to be unlocking the potential of AI and machine learning to activate insights.

FIGURE 17

**What best describes your current approach to customer insights in the context of customer relationship management?**

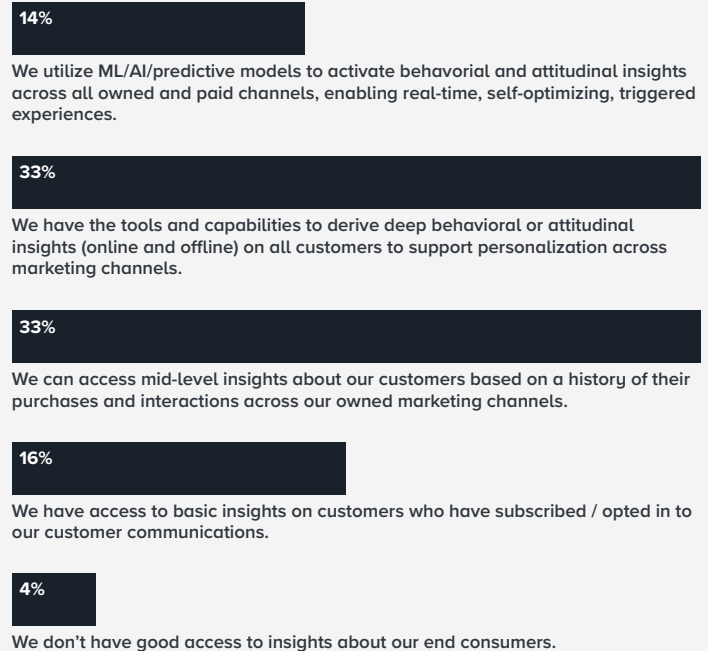
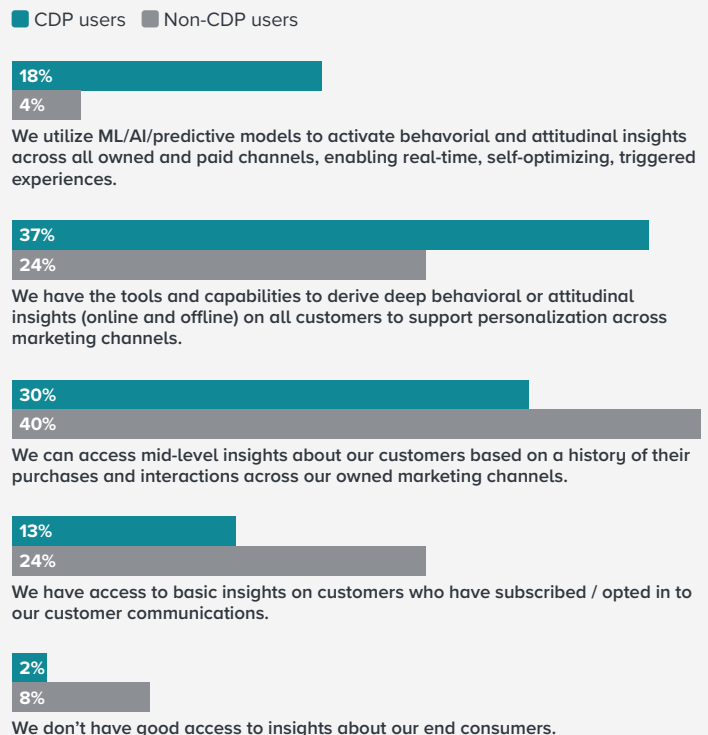


FIGURE 18

**What best describes your current approach to customer insights in the context of customer relationship management? (CDP vs. non-CDP)**



**First-party data – a good foundation for digital advertisers to build on**

The research found that almost all marketers (95%) have access to first-party customer data in some form (Figure 19). However, only 13% are currently able to use and activate first-party customer data across both owned and paid channels. And a third (28%) are still struggling to make full use of first-party customer data because data is scattered across departmental silos.

As might be expected, CDP users are far more advanced in their ability to use first-party data (Figure 20). Three-quarters (74%) have a single customer view, and are able to derive insights and use them to personalize their channels. In contrast, only half of non-CDP users (49%) believe they have an SCV, and of those only 20% say their first-party data is being activated through their marketing channels.

CDP users are far more advanced in their ability to use first-party data, and to leverage unified customer profiles across all their marketing channels.

FIGURE 19

**With regards to first-party data, which statement best describes your current situation?**

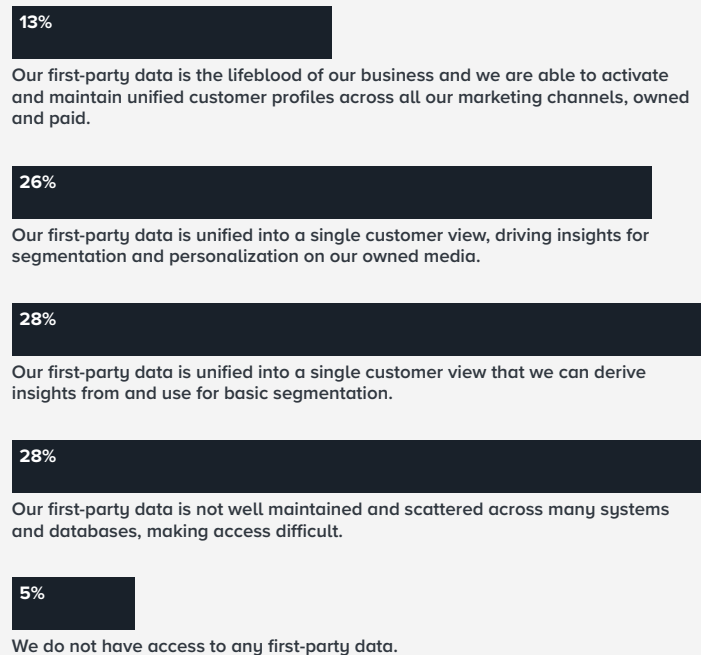
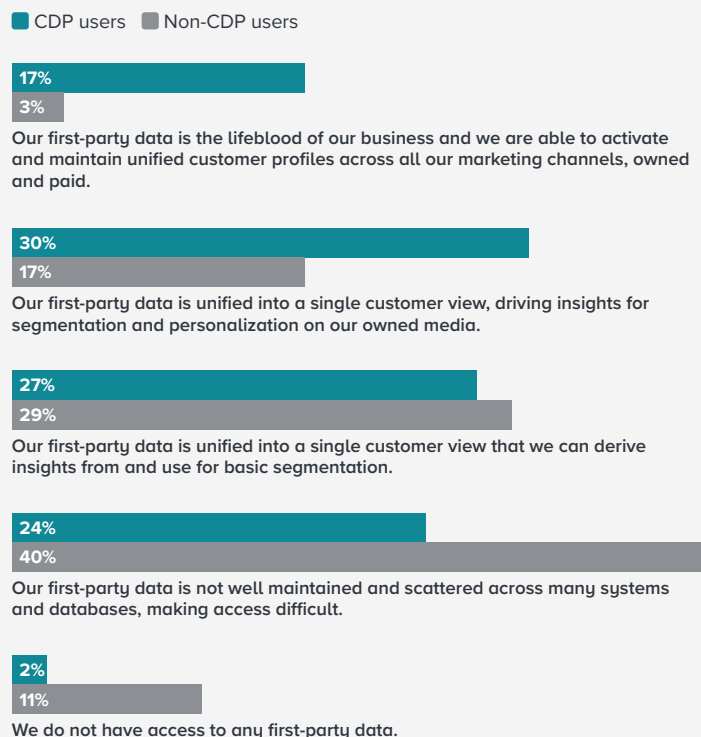


FIGURE 20

**With regards to first-party data, which statement best describes your current situation? (CDP vs. non-CDP)**





Following on from this, *Figure 21* shows that just 16% of brands have fully integrated first-party data into their advertising. This is unsurprising given the historic reliance on third-party data to drive targeted advertising, but it highlights the impending problem when third-party cookies and audiences become less targeted and/or disappear entirely.

The good news is that more than three-quarters (77%) of respondents are using some form of first-party data in their audience definition and targeting (*Figure 17*). And almost a third (31%) are using higher-order first-party data sets (behavioral and transactional data) and are therefore well placed to move into the most advanced ‘integrated’ classification.

### What leading digital marketing experts say about the transition to first-party data

“A focus on first-party privacy-centric data fits very well with our ambition to offer relevant and personalized experiences. Although the disappearance of third-party cookies is often seen as a threat to the effectiveness of digital marketing, we believe it answers a growing customer need for awareness and understanding of privacy and data exchange.”

Dirk de Raaff  
Head of Quantitative Marketing  
**KLM**



“First-party data enables us to connect with our customers in an open and transparent way. We empower our customers to decide for themselves what we can and can’t do with their data and then act accordingly. In addition, data ownership rests solely with Transavia and our customers, and therefore we have less dependencies and risks with third-party suppliers.”

Pelle den Engelsman  
Lead Acquisition & Prepare for flight  
**Transavia**



FIGURE 21

### Which of the following zero- and first-party data points do you use to optimize digital advertising campaigns and target the right audiences?

16%

First- and zero-party data are fully integrated with our ad platforms, including transactional, operational and anonymous profile data, to dynamically add/suppress individuals, build lookalikes and personalize ads.

31%

We analyze full customer attributes with basic behavioral and transactional data (e.g. website visits, products purchased and payment methods) to define dynamic consumer segments.

25%

We analyze all available customer profile attributes (e.g. geography, gender, birthday, product interests) to define tighter consumer segments.

21%

We have simple customer profile attributes (e.g. customer/non-customer, product purchased or source of website visit) that we use to define broad consumer segments.

7%

We don’t use our first-party data to target our digital advertising campaigns.

Just 16% of brands have fully integrated first-party data into their advertising.

Once again, CDP users are ahead in their use of zero/first-party data (Figure 22). They are two-and-a-half times more likely than non-users (57% vs. 23%) to be activating more dynamic (behavioral and transactional) zero- and first-party data attributes in the targeting of their digital advertising. Moving beyond audiences defined by attributes that are either static (for example, gender), slow-moving (e.g. age) or easily-derived (e.g. device type) in this way unlocks the potential for the tighter targeting (and therefore personalization) of digital advertising.

Comparing the collection and use of zero-party data across CDP and non-CDP equipped businesses shows that CDP users are far more likely to be leveraging this data across their owned and paid media channels (22% vs. 1%), while almost a fifth of non-CDP users (18%) are not using first-party data in their advertising at all. Three out of five non-CDP users do use their first-party data to inform their digital advertising campaigns, but this is not done in an integrated way. The conclusion must be that businesses that use a CDP are better placed to thrive in the cookieless world than those that don't.

FIGURE 22

### Which of the following zero- and first-party data points do you use to optimize digital advertising campaigns and target the right audiences? (CDP vs. non-CDP)

■ CDP users  
■ Non-CDP users



First- and zero-party data are fully integrated with our ad platforms, including transactional, operational and anonymous profile data, to dynamically add/suppress individuals, build lookalikes and personalize ads.



We analyze full customer attributes with basic behavioral and transactional data (e.g. website visits, products purchased and payment methods) to define dynamic consumer segments.



We analyze all available customer profile attributes (e.g. geography, gender, birthday, product interests) to define tighter consumer segments.



We have simple customer profile attributes (e.g. customer/non-customer, product purchased or source of website visit) that we use to define broad consumer segments.



We don't use our first-party data to target our digital advertising campaigns.

CDP users are two-and-a-half times more likely than non-users (57% vs. 23%) to be activating more dynamic zero- and first-party data attributes in the targeting of their digital advertising.

### Loyalty programs – delivering value to earn customer data

One of the key sources for zero- and first-party data is the loyalty/retention program. This means they will be the critical underpinning to any response to the loss of third-party cookies. But as *Figure 23* shows, while almost two-thirds (62%) of respondents are deploying loyalty programs to some degree to reward and retain customers, only 19% feel that their business is investing significantly and dedicating resources to driving loyalty.

In order to maximize their value in a post-3PC world, loyalty programs will also need to be managed in a much more sophisticated way in the future. Hearteningly, *Figure 23* also demonstrates that batch-and-blast approaches to marketing are (mostly) a thing of the past. Just 13% of respondents admit to sending all customers the same promotional offers, indicating a more intelligent approach to the use of first-party data for segmentation and targeting in 2023.

However, a quarter of those surveyed (25%) are still using basic segmentation based on traditional lifecycle stages. These stages don't always translate to a modern world, one where consumers can advocate for your products without even buying them, and where the assumed consideration phase can often be hidden from attribution software unable to track events such as a conversation between two people, the view of an offline ad etc.

This means over a third (38%) of brands are providing non-personalized experiences and so demonstrating to consumers that they don't understand them at the crucial points in the path to purchase. The result is a continued weakening of customers' connection with these brands, and a missed data collection opportunity.

FIGURE 23

#### What best describes your current approach to lifecycle and loyalty programs in the context of customer relationship management?

19%

We have a highly strategic approach with significant investment. We deliver optimized and integrated, cross-channel comms, gamification and loyalty rewards that drive retention and lifetime value.

22%

We have highly segmented and personalized customer lifecycle programs to continuously improve lifetime value based on customer journey stages with our brands and products.

21%

We have a loyalty scheme and use this to maximize retention and lifetime value for all our existing customers.

25%

We segment customers into lifecycle stages and tailor our campaigns for existing customers to drive retention and improve lifetime value.

13%

We have no / limited marketing programs that are focused on driving customer retention or improving lifetime value. All customers get the same promotional offers.

Only 19% of respondents feel their companies are investing significantly and dedicating resources to driving loyalty.

**Enterprise brands embrace retention**

Breaking these results down by size of business shows the greater maturity and strategic intent of enterprise brands in this area (Figure 24). Three-quarters of enterprise brands (73%) are deploying loyalty schemes to some degree of sophistication, whereas for mid-tier businesses that drops to just above half (56%). Meanwhile, 18% of mid-tier businesses have no loyalty program to drive retention at all.

Three-quarters (73%) of enterprise brands are deploying loyalty schemes to some degree of sophistication.

**FIGURE 24**

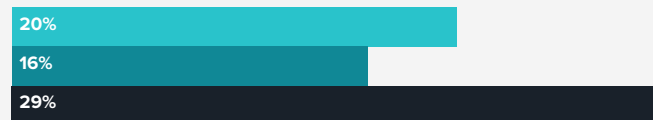
**What best describes your current approach to lifecycle and loyalty programs in the context of customer relationship management?**

(split by business size)

- Less than \$50m
- \$50m-\$500m
- More than \$500m



We have a highly strategic approach with significant investment. We deliver optimized and integrated, cross-channel comms, gamification and loyalty rewards that drive retention and lifetime value.



We have highly segmented and personalized customer lifecycle programs to continuously improve lifetime value based on customer journey stages with our brands and products.



We have a loyalty scheme and use this to maximize retention and lifetime value for all our existing customers.



We segment customers into lifecycle stages and tailor our campaigns for existing customers to drive retention and improve lifetime value.



We have no / limited marketing programs that are focused on driving customer retention or improving lifetime value. All customers get the same promotional offers.

Finally, comparing CDP users with non-users in the sophistication of their loyalty programs, we see CDP users are three times more likely to be delivering sophisticated retention programs and adopting a strategic, integrated approach to generating and activating first-party data (Figure 25).

CDP users are three  
times more likely to be  
delivering sophisticated  
retention programs.

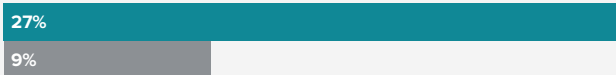
FIGURE 25

**What best describes your current approach to lifecycle and loyalty programs in the context of customer relationship management? (CDP vs. non-CDP)**

■ CDP users  
■ Non-CDP users



We have a highly strategic approach with significant investment. We deliver optimized and integrated, cross-channel comms, gamification and loyalty rewards that drive retention and lifetime value.



We have highly segmented and personalized customer lifecycle programs to continuously improve lifetime value based on customer journey stages with our brands and products.



We have a loyalty scheme and use this to maximize retention and lifetime value for all our existing customers.

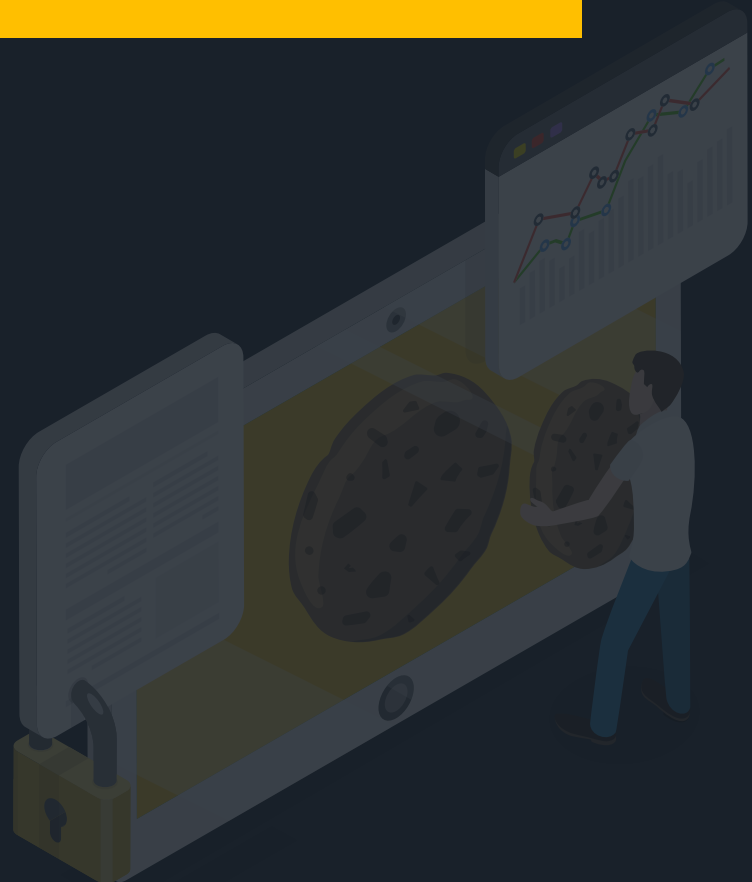


We segment customers into lifecycle stages and tailor our campaigns for existing customers to drive retention and improve lifetime value.



We have no / limited marketing programs that are focused on driving customer retention or improving lifetime value. All customers get the same promotional offers.

**CDP users are three times more likely than non-users to be delivering sophisticated retention programs and adopting a strategic, integrated approach to generating and activating first-party data.**



## Section 4

# Customer journey mapping – a planning ‘super-power’

Customer journey mapping is the second pillar of post-3PC digital marketing, and is closely linked to a company’s use of zero/first-party data and personalization. It’s essential to identify the key points in a customer’s journey where tailored interactions could add value, the personalization required to increase value creation, and the data required to support that personalization.

For example, an airline delivering pre-trip communications needs to know what ‘traveler type’ they’re targeting. Messaging will be very different to an ‘explorer’ making their first trip to their destination, compared to a ‘business traveler’ who is a regular website visitor. A combination of journey analytics and journey mapping provide brands a planning super-power enabling them to design dynamic, value-adding journeys addressing an individual’s needs at key moments – or as Google would say, enabling a brand ‘to be there, be quick and be useful’.

However, just 19% of businesses surveyed are creating one-to-one experiences for their customers, having moved beyond traditional segmentation tactics where personalized experiences are built for assumed groups of customers (Figure 26). This illustrates the opportunity for brands to invest in the data, technology and processes to enable real-time activation throughout a customer journey, and to provide a deeper level of personalization that is dynamic to a specific individual rather than segment- or lifecycle-based.

FIGURE 26

### How would you summarize your current approach to customer journey mapping in the context of customer relationship management?

19%

We have deep, cross-channel customer journey analytics at an individual customer level, enabling dynamic and one-to-one experiences across all channels and customer journey stages.

27%

We have created detailed customer personas and map out entire customer journey lifecycles to tailor for the needs and behaviors of different segments from awareness through to advocacy.

31%

We have created customer personas and map out purchase journeys. We translate customer journey mapping into personalized communications and campaigns for segments.

14%

We perform simple mapping of the customer purchase journey to identify key ‘moments’ of need

9%

We don’t perform any journey mapping

Less than a fifth (19%) of companies have progressed to dynamic one-to-one experiences based on cross-channel customer journey analytics.

For enterprise brands (\$500M+) that rises to 23% that are creating one-to-one experiences across the entire customer journey, but 61% are still using traditional segmentation (Figure 27). In breaking down the data from Figure 19 by company size, just 29% of enterprise brands consider their single customer view capabilities as advanced. This broadly corresponds with the 23% able to map out and create one-to-one experiences, showing the correlation between CDP usage and the ability to deliver personalized experiences to an individual.

Mid-tier brands show the highest percentage of respondents still engaged with more basic segmentation tactics (36%), usually relying on the tools they have in their channel solutions to maintain those segments and audiences. Ambitious brands in this group have a significant opportunity for growth via an investment in their first-party data capability allowing them to store and build golden records, thus allowing them to deliver more relevant experiences to individuals based on deeper insights.

Nearly a quarter (23%) of enterprise brands are creating one-to-one experiences across the entire customer journey, but 61% are still using traditional segmentation.

FIGURE 27

### How would you summarize your current approach to customer journey mapping in the context of customer relationship management?

(split by business size)

- Less than \$50m
- \$50m-\$500m
- More than \$500m



We have deep, cross-channel customer journey analytics at an individual customer level, enabling dynamic and one-to-one experiences across all channels and customer journey stages.



We have created detailed customer personas and map out entire customer journey lifecycles to tailor for the needs and behaviors of different segments from awareness through to advocacy.



We have created customer personas and map out purchase journeys. We translate customer journey mapping into personalized communications and campaigns for segments.



We perform simple mapping of the customer purchase journey to identify key 'moments' of need



We don't perform any journey mapping



Finally, *Figure 28* breaks this data down by CDP use. It shows CDP users are two-and-a-half times more likely than non-users to be able to derive deep, cross-channel customer insights that can be used to drive advanced journey analytics and inform enhanced journey design and organization.

**FIGURE 28**

**How would you summarize your current approach to customer journey mapping in the context of customer relationship management? (CDP vs. non-CDP)**

■ CDP users  
■ Non-CDP users



We have deep, cross-channel customer journey analytics at an individual customer level, enabling dynamic and one-to-one experiences across all channels and customer journey stages.



We have created detailed customer personas and map out entire customer journey lifecycles to tailor for the needs and behaviors of different segments from awareness through to advocacy.



We have created customer personas and map out purchase journeys. We translate customer journey mapping into personalized communications and campaigns for segments.



We perform simple mapping of the customer purchase journey to identify key 'moments' of need



We don't perform any journey mapping

CDP users are two-and-a-half times more likely than non-users to be able to derive deep, cross-channel insights at an individual customer level.

## Section 5

## Personalization – the right person, not the right segment

The ultimate aim of a robust zero/first-party data strategy and a sophisticated approach to customer journey orchestration is personalization of marketing messages; the right message to the right person at the right time via the right medium. The results should be improved customer experiences and greater marketing effectiveness.

The research looked at personalization in both these areas; on owned media (principally the brand's digital properties) and in paid media (advertising).

Figure 29 shows brands' ability to personalize the experience a customer has on their website. Over half (58%) of brands still cannot distinguish between new and existing customers when they arrive at the website, leading to poor or un-optimized customer experiences. But by providing the right experience to an existing customer (for example showing them personalized recommendations rather than a '10% off first purchase' banner), brands can foster loyalty and repeat purchases.

FIGURE 29

**To what extent are you able to recognize whether a returning website visitor is an existing customer and personalize their experience?**

16%

We have the technology to fully recognize both logged-in and non-logged-in customers and prospects, and then fully personalize both digital and offline marketing.

26%

We have the technology to recognize returning website visitors as customers even when not logged-in, and then personalize the website to preferences.

28%

We can recognize returning website visitors as customers only after they've logged-in, and then personalize the website to preferences.

20%

We can recognize returning website visitors only after they've logged into the website. We don't do any personalization based on this information.

10%

We cannot recognize returning website visitors.

Over half (58%) of companies are unable to distinguish between new and existing customers when they arrive at the website.

Unsurprisingly, CDP-equipped businesses are three times more likely to have the capability (via creation of an anonymous ‘shadow’ profile) to recognize an unknown visitor on their website compared to non-CDP businesses (Figure 30). In contrast, these latter companies rely more heavily on a user to authenticate (i.e. sign in) before any personalization can be injected into their experience.

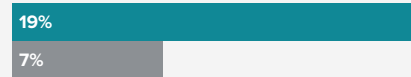
But non-CDP users that drive conversions by delivering the most relevant offers in the moment could find themselves in difficulties, since most visitors are choosing not to authenticate.

This problem will be compounded when third-party cookies go away fully, while even first-party cookies are becoming less reliable or persist for shorter times. As a result, brands must invest in server-side tracking and profile-based identification of visitors to their websites to ensure they maintain good levels of user recognition in the future. Furthermore, on-site acquisition strategies will need to become more robust than ever once brands can no longer rely on third-party data, so brands that can start to recognize more unknown visitors in this way will also be able to negate any revenue dips from less targeted advertising, or activate more unknown visitors in their paid and social channels through first-person retargeting.

FIGURE 30

**To what extent are you able to recognize whether a returning website visitor is an existing customer and personalize their experience? (CDP vs. non-CDP)**

■ CDP users  
■ Non-CDP users



We have the technology to fully recognize both logged-in and non-logged-in customers and prospects, and then fully personalize both digital and offline marketing.



We have the technology to recognize returning website visitors as customers even when not logged-in, and then personalize the website to preferences.



We can recognize returning website visitors as customers only after they've logged-in, and then personalize the website to preferences.



We can recognize returning website visitors only after they've logged into the website. We don't do any personalization based on this information.



We cannot recognize returning website visitors.

CDP-equipped businesses are significantly more likely to recognize unknown website visitors.

**Problems of scale**

The result of analyzing this data by business size might seem counter-intuitive, in that scale is a problem rather than a benefit (Figure 31). The complexity of their systems explains why over half (51%) of the enterprise brands surveyed cannot recognize a website visitor unless they log in or make a purchase, compared with almost two-thirds (60%) of mid-tier businesses, and more than two-thirds (68%) of smaller businesses.

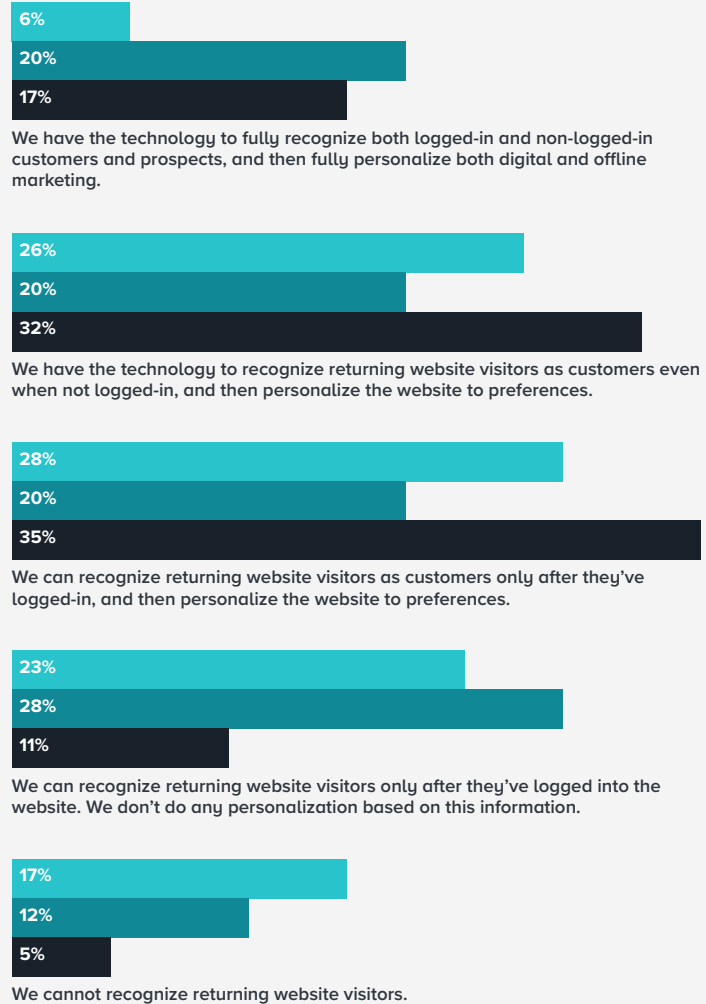
If brands are unable to identify these customers and prospects, they cannot be activated in paid or owned channels. Instead, marketers will have to rely on their customers raising their hand at some stage. As a result, website personalization represents an area of investment that could yield large returns for enterprise businesses.

**FIGURE 31**

**To what extent are you able to recognize whether a returning website visitor is an existing customer and personalize their experience?**

(split by business size)

- Less than \$50m
- \$50m-\$500m
- More than \$500m



Over half (51%) of enterprise brands cannot recognize a website visitor unless they log in or make a purchase.

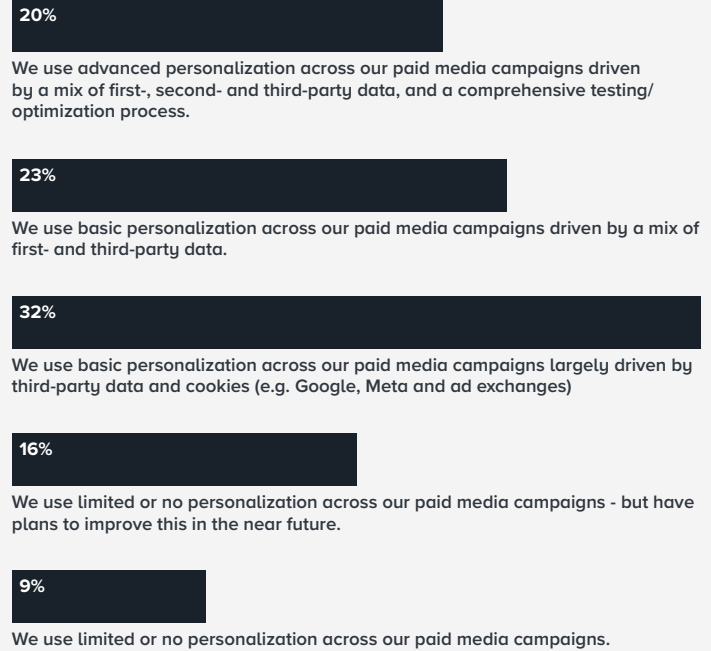
**Continuing reliance on third-party data**

Turning to the ability to personalize paid media campaigns, *Figure 32* shows that nearly a third (32%) of all brands surveyed are still heavily reliant on third-party data for their advertising, while 43% are combining third-party data with first- and second-party data to some degree in their audience targeting. All these brands will see some degradation of performance of these audiences when they are removed fully from the digital ecosystem, but the third of brands still mainly reliant on third-party data will be most exposed, and will need to act fast to meet Google’s 2024 deadline.

*Figure 33* shows how the picture differs between those businesses that have a CDP and those that don’t. CDP users are three-and-a-half times more likely (25% vs. 7%) to be adopting advanced personalization (content, messaging, frequency, sequencing and bid variation/audience testing) in their digital advertising than are non-users. In contrast, non-CDP users are either not leveraging personalization at all (22%) or are dependent on third parties, principally Google and Meta (38%). These companies are the most exposed to the loss of third-party cookies.

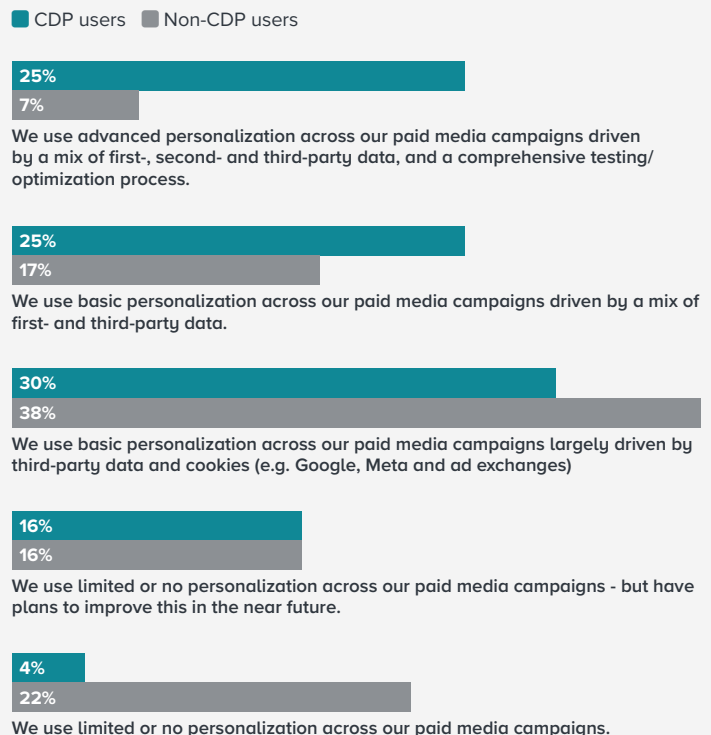
**FIGURE 32**

**What best describes your current approach to effective personalization across your paid media campaigns?**



**FIGURE 33**

**What best describes your current approach to effective personalization across your paid media campaigns? (CDP vs. non-CDP)**



CDP users are three-and-a-half times more likely than non-users (25% vs. 7%) to be adopting advanced personalization.

# Recommendations – How to thrive in the post-cookie world

**1. Stay customer-centric:** Don't forget that despite all the strategic, technical, data and operational challenges, this is ultimately all about consumers. The imperative is to understand them and serve them better in the new data world. Place customer needs at the heart of your planning processes, and use customer journey mapping and orchestration to 'walk in their shoes'.

**2. Take the strategic lead:** Marketers must lead from the front in defining the next generation of privacy-compliant digital marketing programs. They must develop the in-house expertise and leverage supply chain partners to inform the strategic debate and collaborate with all key internal stakeholders (IT, legal, finance/compliance, procurement and operations). However, they must provide clear leadership, direction and ownership of the change management program required to reinvent digital marketing and turn the strategic challenge of third-party data restrictions into an opportunity.

**3. Develop a robust zero/first-party data strategy:** Zero- and first-party data will be the foundation stone of your post-3PC marketing, as well as being currency in any second-party data partnerships you may engage in. Think about the value you need to offer your prospects and customers to encourage them to share their data with you, and to continue doing so. Keep focused on why you are collecting zero/first-party data and what you will do with it, not how you will execute this. Remember data is a means to an end, never an end in itself.

**4. Turn data into better digital experiences:** The biggest challenge in the new world of digital marketing will be the need to see the whole picture, from a customer's first encounter with your brand to their repeat purchases. Without a single view of the customer, you won't get out of the starting blocks. The most important thing you can do is bring all your data together from across the company to help identify meaningful insights that can be actioned to deliver enhanced experiences in your marketing programs (both acquisition and retention).

**5. Break down the silos:** Adopt an integrated approach across your acquisition and retention/CRM program. Brands need to deliver a seamless experience across the customer lifecycle, and the individual purchase decision journeys that make this up. Actively seek out and exploit the synergies across them and don't let internal organizational design get in the way of a more joined-up, end-to-end approach to digital marketing.

**6. Place the right technology bets:** As this research has shown, certain technologies are fundamental to a company's ability to survive and thrive in the new world. Audit your tech stack, explore other cookieless solutions, see where the gaps are, and address them.

**7. Take your people with you:** Adapting to the post-cookie world is not just a technological issue. It requires new skills and new ways of thinking, from the marketing department to the boardroom. Education, training and careful management will be needed to help staff come to terms with the new environment.

**8. Stay agile:** The precise nature of the post-cookie world is still unclear. New techniques and technologies will emerge, and current ones may falter. Set aside time and budget to experiment, and be ready to adopt new approaches rapidly, in order to create a competitive advantage. In a world of change it's vital to keep innovating.

"As I was reading this report, I was struck by the comment, 'a single customer view is one of the most difficult technology, data and process challenges for a business, since it often involves breaking down organizational silos'. That's a great way to sum up the challenges faced with CDP projects and implementations, but as I look at the report findings, I can't help feeling that it also sums up the customer experience challenge from the eyes of the consumer: to deliver the seamless and relevant experience expected by a customer, businesses need to continue to work on removing internal silos.

"The complexities of the loss of third-party cookies are certainly significant and will affect each marketing channel and the customer experience at each stage of the lifecycle differently. There are real challenges to getting it right. But as this report shows, it can be done."



Timur Asar  
Partner  
Comwrap Reply

# Appendix

## Respondent profiles

FIGURE 34

In which country are you based?

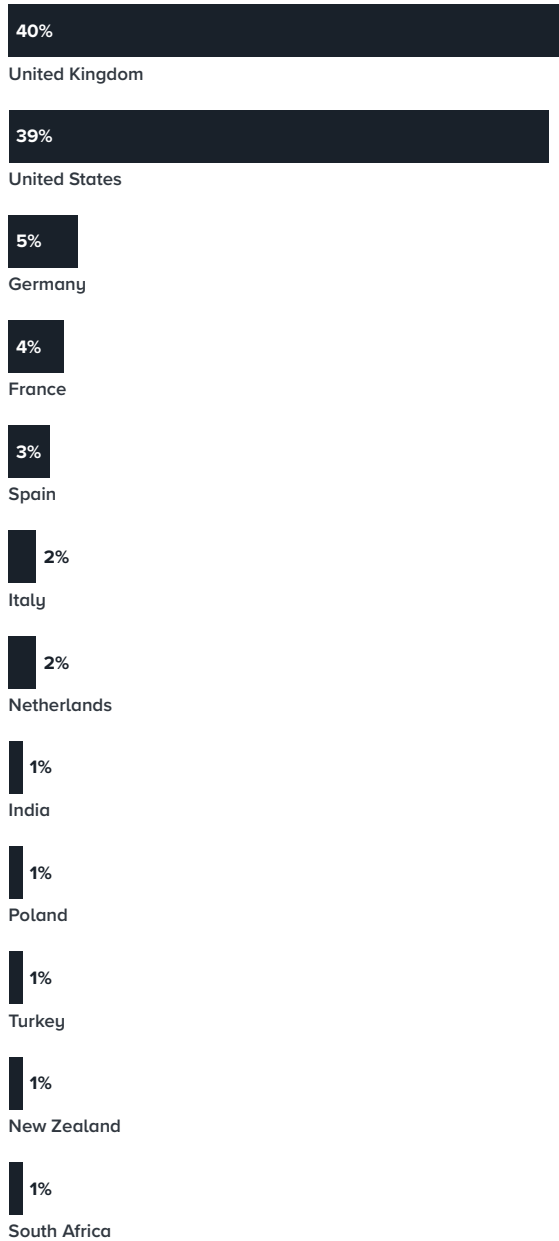


FIGURE 35

What is your annual company revenue?

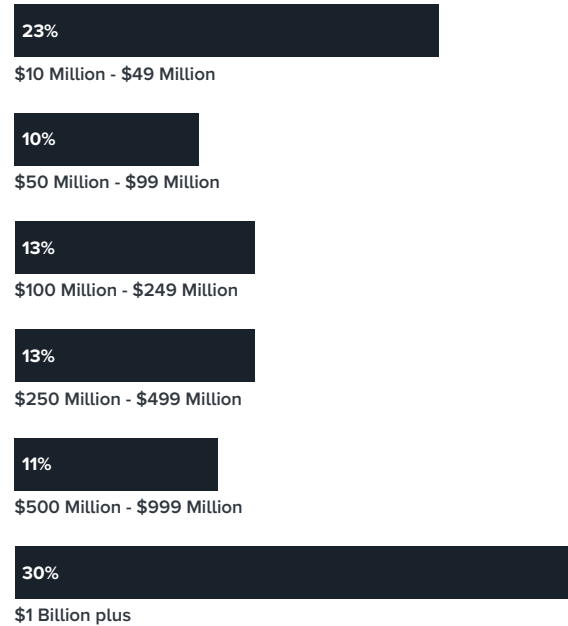


FIGURE 36

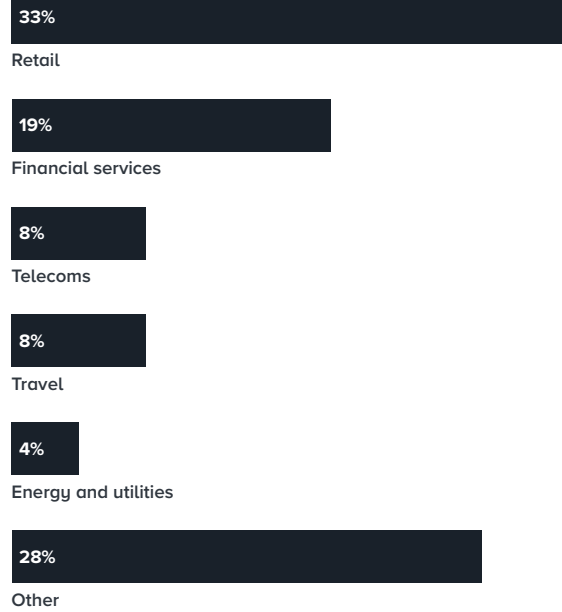
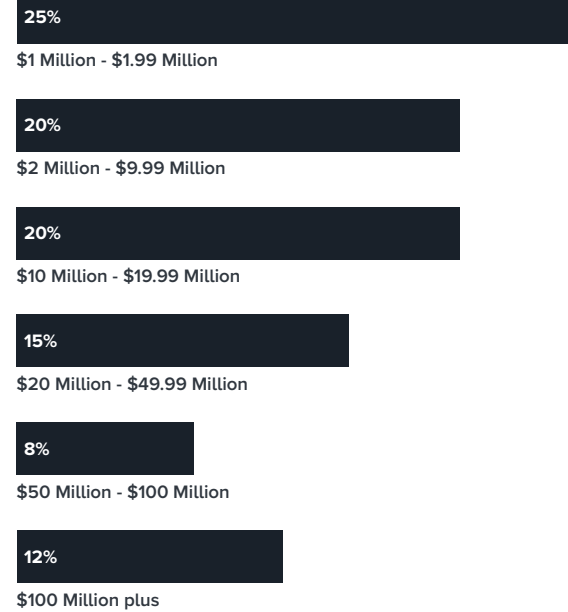
**Which business sector does your company operate in?**

FIGURE 37

**What is your annual marketing budget for digital media?**



## About us



London Research, set up by former Econsultancy research director Linus Gregoriadis, is focused on producing research-based content for B2B audiences. We are based in London, but our approach and outlook are very much international. We work predominantly, but not exclusively, with marketing technology vendors and agencies seeking to tell a compelling story based on robust research and insightful data points.

As part of Communitize Ltd, we work closely with our sister companies Digital Doughnut (a global community of more than 1.5 million marketers) and Demand Exchange (a lead generation platform), both to syndicate our research and generate high-quality leads.

[londonresearch.com](https://londonresearch.com)



Relay42 is an Orchestration Customer Data Platform (CDP) that empowers businesses to create meaningful customer relationships by utilizing smart technology to transform fragmented interactions into seamless journeys. Relay42 gives businesses the freedom, flexibility, and agility to build sustainable customer relationships, using valuable customer data as a baseline.

Global brands including KLM, Heineken, Levi's, and FedEx rely on Relay42 to anticipate and address customer needs in real time across all online and offline channels. Relay42 is the only platform built for AI-driven customer journeys with real-time connectivity to all systems and touchpoints.

[relay42.com](https://relay42.com)

## About the authors



### **Andrew Campbell**

Martech Consultant

A marketer at heart but with a passion for designing and delivering technology-led marketing solutions that add value for consumers and deliver competitive advantage (and profits) to brand owners. Andrew has more than 25 years of experience leveraging technology to deliver marketing goals, including executive management roles both client-side and supply-side.

He has a proven track record helping to grow brands and businesses, translating marketing theory into improved bottom-line performance, developing marketing strategy, and delivering high-payback marketing programs.



### **Michael Nutley**

Digital Media and Marketing Journalist

Michael is a London Research writer specializing in digital media and marketing. He was head of content for London Research sister company Digital Doughnut between 2012 and 2016, and during that time edited the European channel of Adobe's CMO.com website. Before that he was editor of New Media Age, the UK's leading news publication for interactive business from 2000 to 2007, and its editor-in-chief from 2007 to 2011. He has written widely about the sector, is a regular speaker in the media and on the conference circuit, and has lectured on the future of advertising and publishing at the London College of Communications.



