Leveraging consumer data for marketing

Survey findings: India 2022

MMA

EY
Building a better working world

Foreword

Mohit Malhotra
Chief Executive Officer
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COVID-19, as we all know, has been a black swan event, which nobody saw coming. Not only did it transform the way we live and work, but it also had a sustainable impact on consumer attitudes, behaviors and purchasing habits.

The pandemic became an inflection point and a reason for strategic transformation across enterprises. E-commerce emerged as the most-preferred contactless method of making purchases in the post-pandemic world. With the explosion of e-commerce and the emerging digital technologies, companies are now sweeping up vast quantities of data about consumers' activities.

The insights that customer data delivers help not just improve your product delivery but also your consumer experience. This, in turn, boosts revenue growth. The key, however, is not to only gather useful data but to analyze it thoroughly, to have actionable insights to execute.

While data marketing is nothing new, the amount of data that marketers are collecting now is much more than ever before and continues to grow with each passing day. As a result, the insight opportunities are also growing.

Taking control of your consumer data not only helps organizations make marketing communications more targeted, but also goes a long way in improving the efficiency of their marketing plans, besides helping develop better and long-lasting consumer relationships and loyalty. Consumer data is the fuel for creating smarter acquisition and retention strategies. The key to maximizing returns is being able to visualize and act on this data.

Moneka Khurana
Country Head and Board Member
MMA India

For businesses, consumer delight has always been the holy grail. However, delighting the modern consumer has never been more challenging. Full of contradictions, consumers of today want personalization without compromising their privacy.

Given the integration of online channels in consumers' lives, a strong data architecture that is built on the pillars of aggregation, accessibility and usage, measurement and governance can be the distinguishing factor between winning market organizations and other lagging marketing organizations. As a leading industry body, we have consistently initiated and engaged in constructive discourses that can empower marketers to make a meaningful impact.

To further that goal, MMA jointly with EY surveyed more than 170 CEOs and CMOs across various sectors to decode the current state of the required data capability, gaps, and further challenges.

Our research this year shows:

a.   91% vs. 82% marketers last year, leveraged consumer data for marketing activities

b.   78% vs. 68% marketers saw a lift in marketing efficiencies due to leveraging consumer data

One of the pressing issues continues to be data quality. It's imperative not just for effective decision-making, but also for offering a customer experience that leads to delight. While marketers across industries have been successfully leveraging data for measurement and targeting, we have miles to go when it comes to utilizing data for offering personalized experiences, developing new product lines, increasing wallet shares, and staying ahead of competitors. Over 50% of respondents feel that this is a glaring gap, and it needs to be addressed immediately.

As we make strides in strengthening our data capabilities, we need to simultaneously ensure that we focus on governance and data security. Alarmingly, fewer marketers today feel that they have adequate policies and processes in place to safeguard consumer data.

This report offers a much-needed view of your data maturity and best practices to guide you as you navigate and strengthen your data foot prints. The report will help businesses in general and marketers in particular to get an assessment of where they are and provide guidance on where they need to be and how to get there.

Happy reading.

Digital advertising share will reach up to **50% by 2024**, with Indian advertising expected to reach **INR 100,000 Crores**.

EY, jointly with MMA, surveyed CEOs and CMOs across various sectors to understand key trends amongst the marketer community on consumer data strategy. This is the second edition of the report and showcases interesting trends in the evolution of archetypes across sectors.

Our research highlighted that marketers need to focus on designing robust decision-making processes. While collection and usage of data has considerably increased across sectors, the leg connecting the data for decision making is still lacking.

Marketers need to play a critical role in organization-wide application of data. Only 1 of 3 marketers is currently using data for cross sell, competitor analysis, and distribution management. Out of 17 potential use cases of consumer data, only three to four are explored by 50% of the marketers. The report shows critical movement from usage of blend of 1P and 3P data to mainly 1P with 3P as a complement. Robust attribution model still remains a distant dream.

Marketers are exploring contextual and publisher targeting as a key strategy for tackling with cookie-less world. Martech capability and building and safeguarding of consumer data are the priority areas across organizations.

We hope you find this report useful and insightful.

Amiya Swarup
Partner,
Marketing Advisory Services
EY

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Executive summary

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Data types and uses

Collection and usage of data has considerably increased across sectors; however, marketers need to focus on designing a robust decision-making process.

Cross channel retargeting and personalisation could be the next use cases to be leveraged by marketers. Currently, only 3-4 out of 17 potential use cases are explored by 50% of the marketers.

● 2022
● 2021

57% **57%**

Of survey respondents believed they used and activated personal level consumer data optimally

58% **56%**

felt their organizations had gaps in consumer data, leading to difficulties in data-driven decision making

71% **73%**

relied on a blend of 1P and 3P data for marketing activities

Most popular data use cases

1. Analytics
2. Retargeting
3. Location based tracking

Most relied on data points for decision making

1. Sales and conversion data
2. Engagement data

Only 1 out of 3 marketers use consumer data for product development, cross sell and competitor analysis

2

ROI measurement and attribution

Most Indian marketers saw the benefit of leveraging consumer data for marketing, but the struggle with robust attribution models continued in 2022.

Marketers are exploring contextual and publisher targeting as key strategy for tackling with cookie-less world, and enriching 1P data through communities and feedback system.

2022 ⬤
2021 ⬤

42% | **54%**
leveraged consumer data for marketing activities

68% | **78%**
saw a lift in marketing efficiency due to leveraging consumer data

29% | **35%**
had extensively used data attribution

12% | **15%**
had robust attribution models
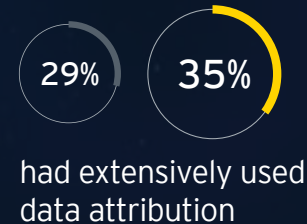
Highest usage of marketing budgets

1. Performance & growth
2. Brand building

Most relied on to support media decisions

1. Brand trackers
2. A/B testing

3

Capabilities and skills

A majority of respondents had built martech capabilities or were working towards that goal. Automation, identity management, and next best action continued to be the biggest gaps in martech capabilities

72% **79%**

had built either best in class or developed / outsourced martech capabilities
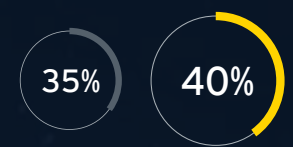
35% **40%**

had adequate access to advanced analytics and data science resources

● 2022
● 2021

Least developed martech capabilities

1. Automation & AI
2. Identity management
3. Next best action

4

Data ownership, governance, and integration

Increasing number of Indian marketers had defined ownership and management strategies for 1P consumer data.

However, integration of 1P and 3P data, limited employee access to data, and absence of cross fishing rules are yet to be developed. Fewer respondents believed that their consumer data was adequately safeguarded

● 2022
● 2021

58% **66%**

had defined ownership and management strategies for 1P consumer data

60% **55%**

had little / no integration of their first party (1P) and third party (3P) data with limited employee access

32% **38%**

had cross-fishing rules defined for sharing of consumer data between brands

89% **84%**

believed they had adequate policies and processes in place to safeguard consumer data
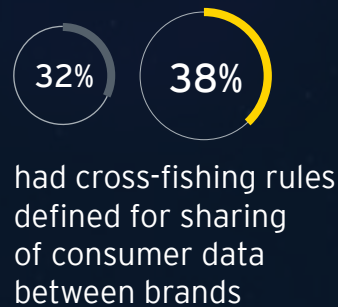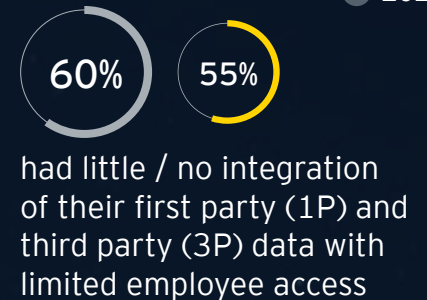
Archetypes

● 2022
● 2021

Data management
(Data types & uses +
RoI measurement &
attribution)

High

Data enthusiasts **11%**

High use of data for marketing activities,
but with gaps in governance and ownership,
and lack of access to resources, as they are
yet to invest in data capabilities and skills to
improve governance and processes

9%

Data leaders **42%**

High use of data, well defined RoI
measurement, access to required
capabilities and skills and defined
processes around governance and access

36%

Left behinds **33%**

Not yet started / just about to start the
journey of using consumer data for marketing
and large gaps exist in data availability and RoI
measurement, as they are yet to invest in data
capabilities and skills and define processes
around governance and access

40%

Data committed **14%**

Started the journey of using consumer
data for marketing with gaps existing in RoI
measurement, but have invested in required
capabilities and skills and have defined
processes around governance and access

15%

Low

Low   High

Maturity
(Capabilities & skills + Data ownership, governance, and integration)

While respondents believed that
consumption data was critical
for marketing effectiveness, our
survey indicated two distinct
data maturity archetypes:
the Data leaders (42% of
respondents) who had made
investments in consumer data
and were reaping the benefits,
and the Left behinds (33%
of respondents) who were
just about to start on their
consumer data journey.

Majority of the sectors have
moved up on the data maturity
curve with telecom and
realty leading and CPG has
considerable grounds to cover.
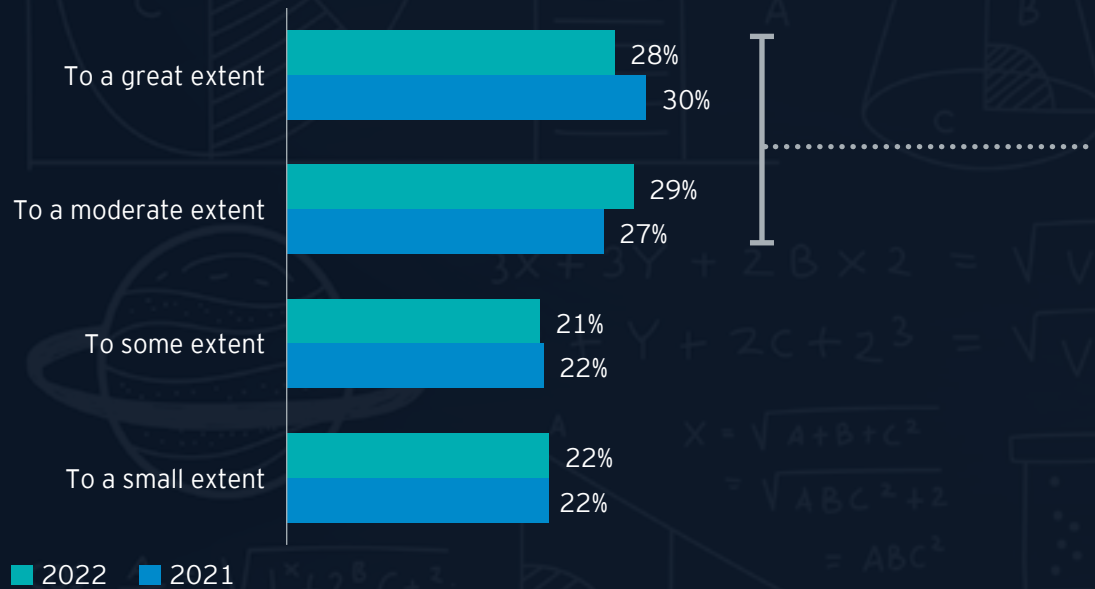
1

Data types and uses

Most Indian marketers used a blend of 1P and 3P data for marketing but were increasing efforts to build 1P data

However, a majority believed that gaps in data breadth, depth and quality needed to be addressed to enable optimal use of data for decision making

57% of organizations used and activated personal level consumer data more optimally

To what extent does your organization **use and activate personal level consumer data?**
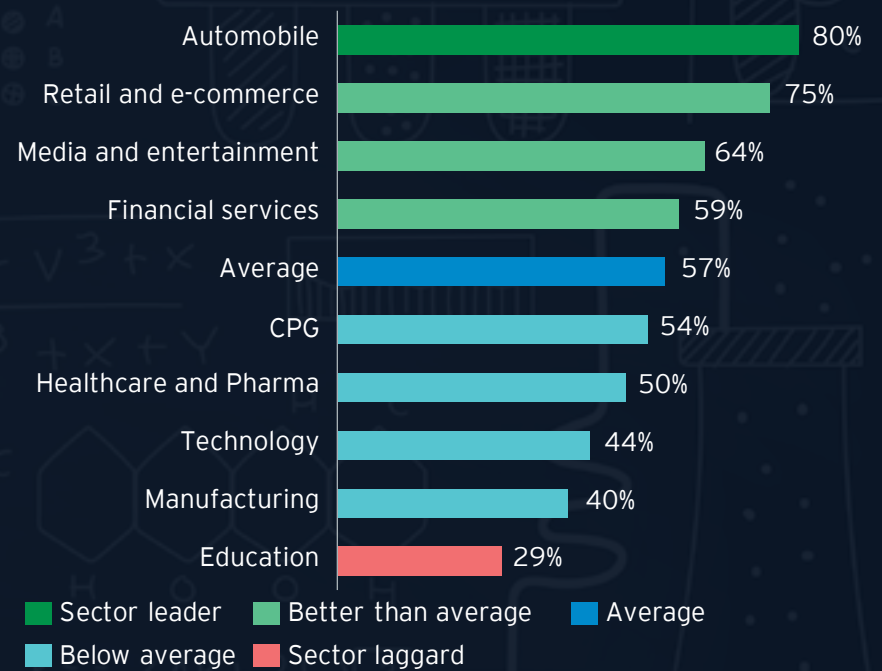
Extent	2022	2021
To a great extent	28%	30%
To a moderate extent	29%	27%
To some extent	21%	22%
To a small extent	22%	22%

■ 2022 ■ 2021

57% 2022 survey result

57% 2021 survey result

For the purposes of this survey we define personal consumer data as any information received about the consumers such as purchase behaviour, product preferences and contact information, which can be collected through first, second, or third-party entities.

Sectoral comparison: Usage and activation of consumer data to **moderate and great extent**

Sector	%
Automobile	80%
Retail and e-commerce	75%
Media and entertainment	64%
Financial services	59%
Average	57%
CPG	54%
Healthcare and Pharma	50%
Technology	44%
Manufacturing	40%
Education	29%

■ Sector leader ■ Better than average ■ Average
■ Below average ■ Sector laggard

Current survey results demonstrated automobile, media and entertainment, and manufacturing sectors have increased the use and activation of personal level consumer data

However, **56%** Indian marketers had gaps in consumer data leading to difficulties in data-driven decision making

Which of the following best describes the **breadth and depth** of overall consumer data and is also available to drive decision making?

Data is complete and deep; data driven decision making
- 17% (2022)
- 7% (2021)

Largely complete data, some data lacks depth; adequate decision making
- 27% (2022)
- 36% (2021)

Adequate data with some gaps; moderate difficulty in decision making
- 43% (2022)
- 39% (2021)

Incomplete data; high difficulty in decision making
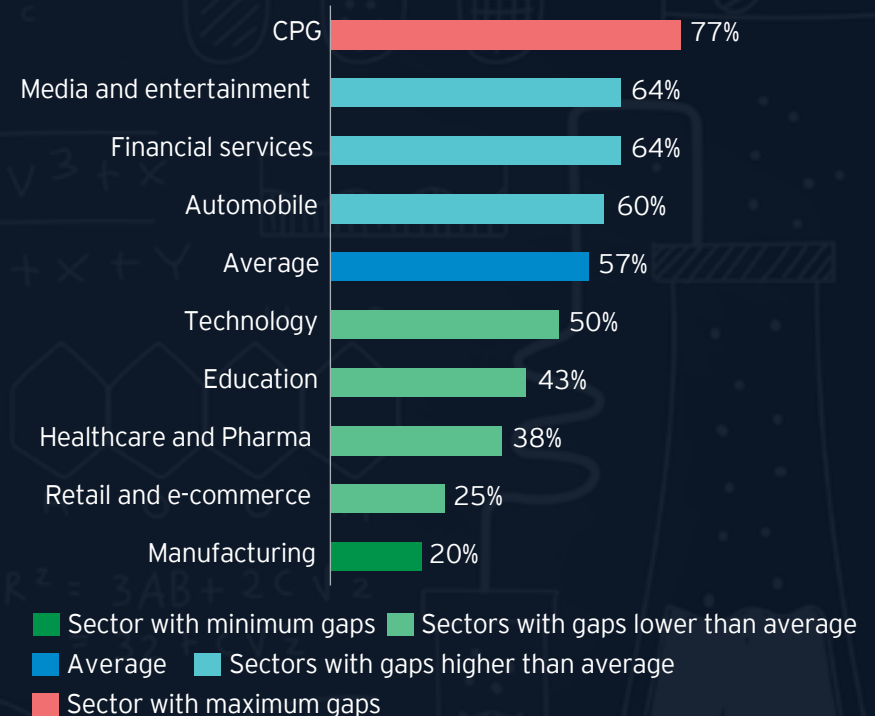- 13% (2022)
- 19% (2021)

■ 2022 ■ 2021

56% 2022 survey result

58% 2021 survey result
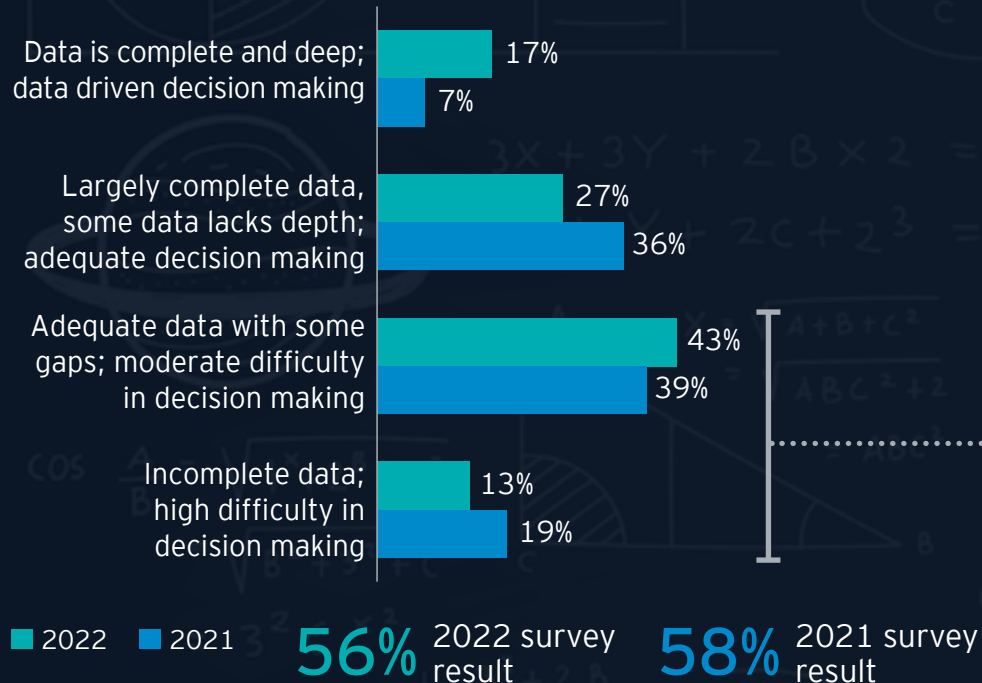
Sectoral comparison: Consumer data **with gaps** leading to difficulties in decision making

Sector	Gaps
CPG	77%
Media and entertainment	64%
Financial services	64%
Automobile	60%
Average	57%
Technology	50%
Education	43%
Healthcare and Pharma	38%
Retail and e-commerce	25%
Manufacturing	20%

■ Sector with minimum gaps ■ Sectors with gaps lower than average
■ Average ■ Sectors with gaps higher than average
■ Sector with maximum gaps

Indian marketers used personal data for activities other than targeting and segmentation, including cross sell and product development

What do you use personal level data for?
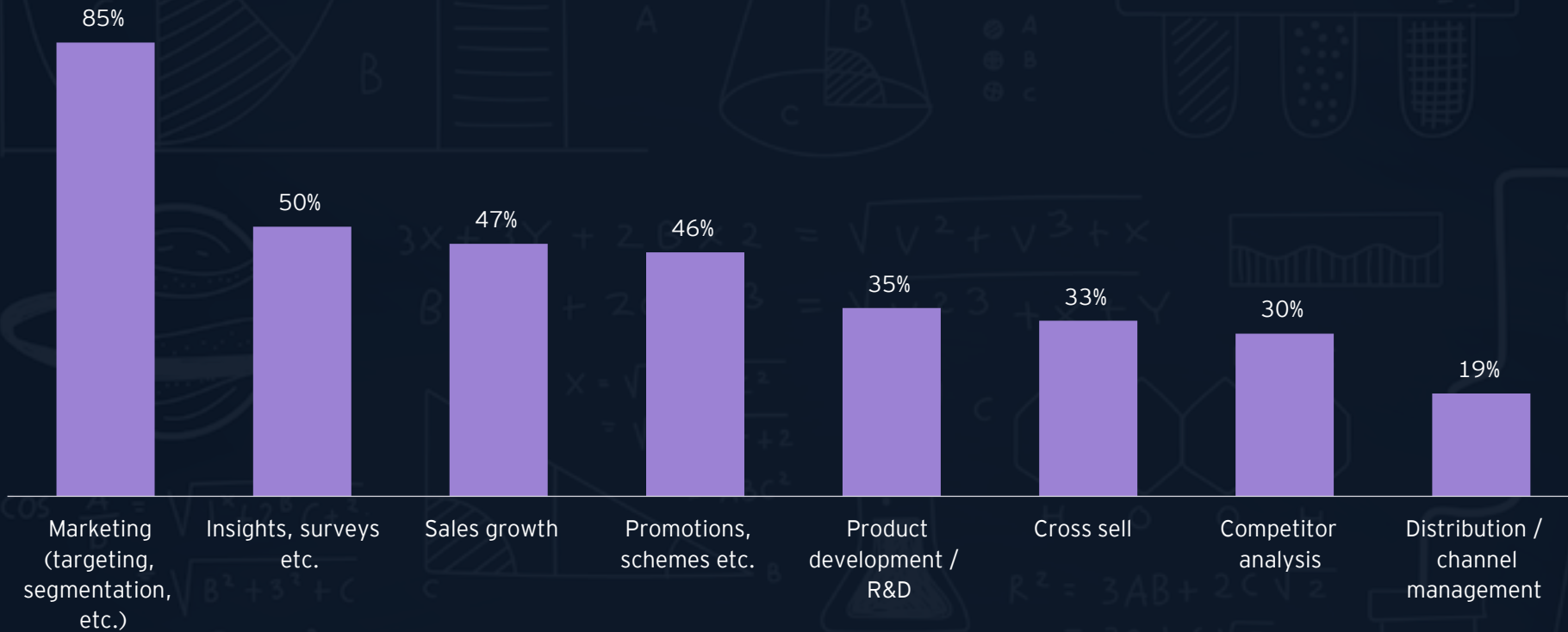
Only 1 out of 3 marketers use personal data for cross sell and competitor analysis

73% of organizations relied on a blend of 1P and 3P data for marketing activities and a majority were working towards increasing 1P data

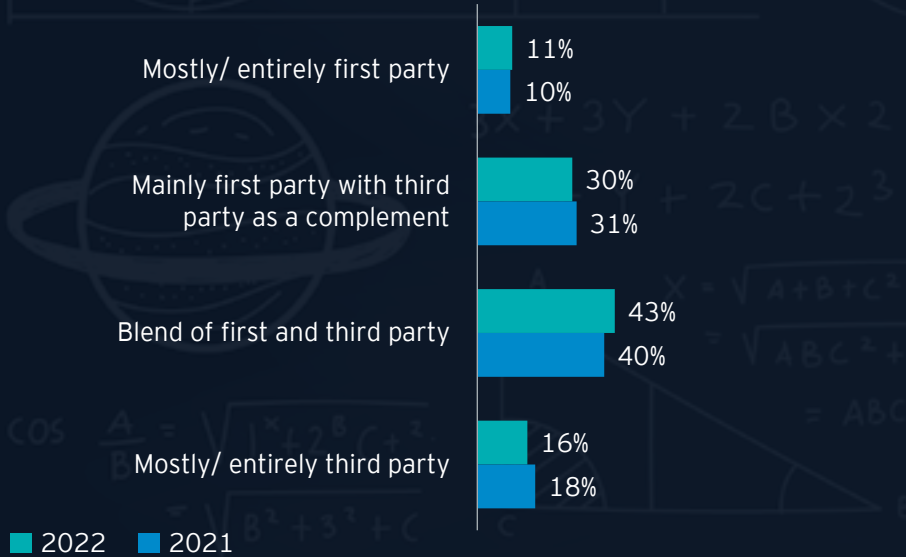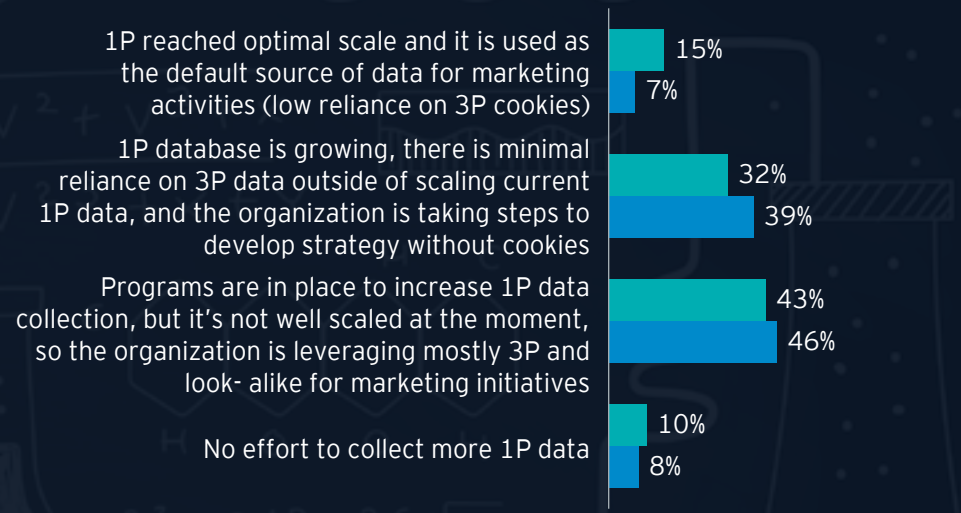How would you describe the **blend of first and third party data** that your organization relies on to activate marketing related initiatives (i.e. CRM activation, media activation, advertising, promotional efforts)?

Which of the following best describes where your **organization is heading** when it comes to first party (1P) and third party (3P) data?

	2022	2021
Mostly/ entirely first party	11%	10%
Mainly first party with third party as a complement	30%	31%
Blend of first and third party	43%	40%
Mostly/ entirely third party	16%	18%

	2022	2021
1P reached optimal scale and it is used as the default source of data for marketing activities (low reliance on 3P cookies)	15%	7%
1P database is growing, there is minimal reliance on 3P data outside of scaling current 1P data, and the organization is taking steps to develop strategy without cookies	32%	39%
Programs are in place to increase 1P data collection, but it's not well scaled at the moment, so the organization is leveraging mostly 3P and look- alike for marketing initiatives	43%	46%
No effort to collect more 1P data	10%	8%

■ 2022   ■ 2021

73% 2022 survey result   **71%** 2021 survey result

Sectoral comparison: Education and Retail and e-commerce had a higher share of 1P data

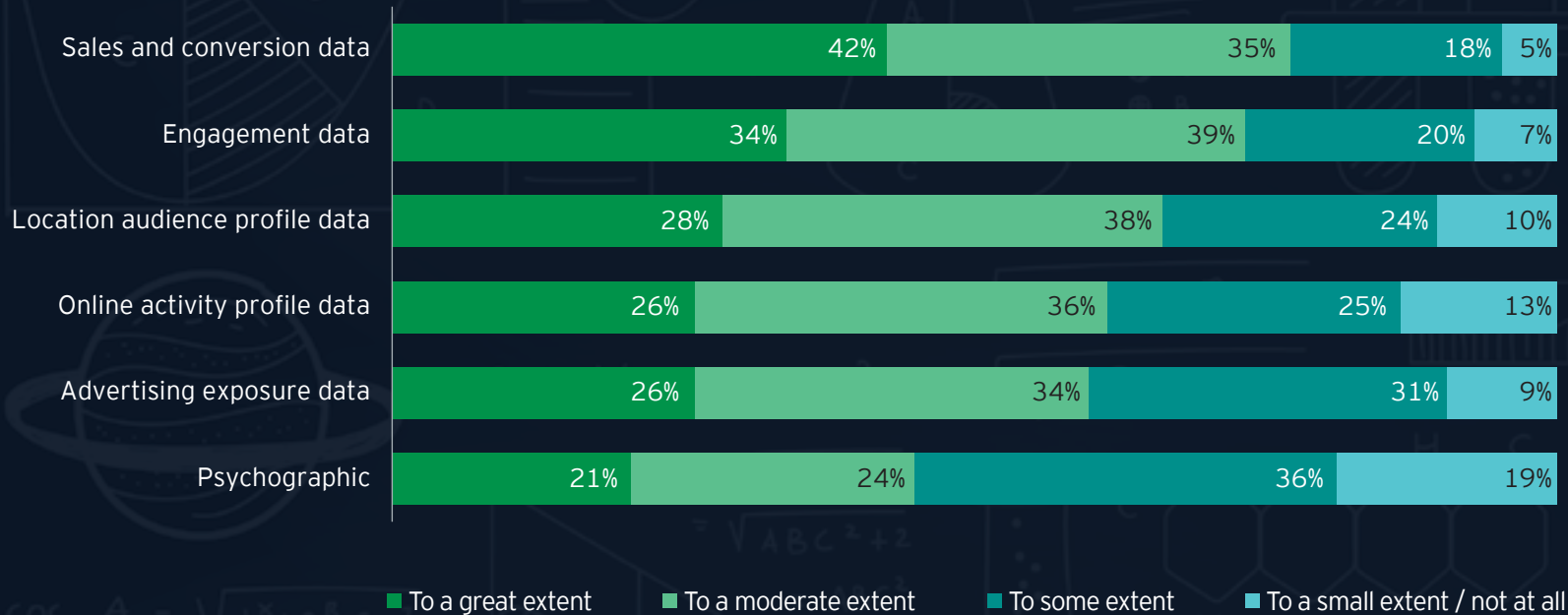| Sector	Mostly/ entirely 1P	Mainly 1P with 3P as a complement	Blend of 1P and 3P	Mostly/ entirely 3P
Retail and e-commerce	25%	50%	25%	
Education	29%	29%	29%	14%
Financial services	14%	32%	50%	5%
Technology	25%	19%	38%	19%
Average	11%	30%	43%	16%
CPG	8%	31%	31%	31%
Healthcare and Pharma		38%	38%	25%
Media and entertainment		30%	45%	24%
Automobile	20%	10%	70%	
Manufacturing		20%	80%	

■ Mostly/ entirely 1P ■ Mainly 1P with 3P as a complement ■ Blend of 1P and 3P ■ Mostly/ entirely 3P

Sales conversion and engagement data was most relied on for decision making

How much do you **rely** on each of the following types of **data to make decisions**?

	To a great extent	To a moderate extent	To some extent	To a small extent / not at all
Sales and conversion data	42%	35%	18%	5%
Engagement data	34%	39%	20%	7%
Location audience profile data	28%	38%	24%	10%
Online activity profile data	26%	36%	25%	13%
Advertising exposure data	26%	34%	31%	9%
Psychographic	21%	24%	36%	19%

Sectoral comparison: M&E and CPG were the leaders in higher usage of the data across the spectrum for decision making
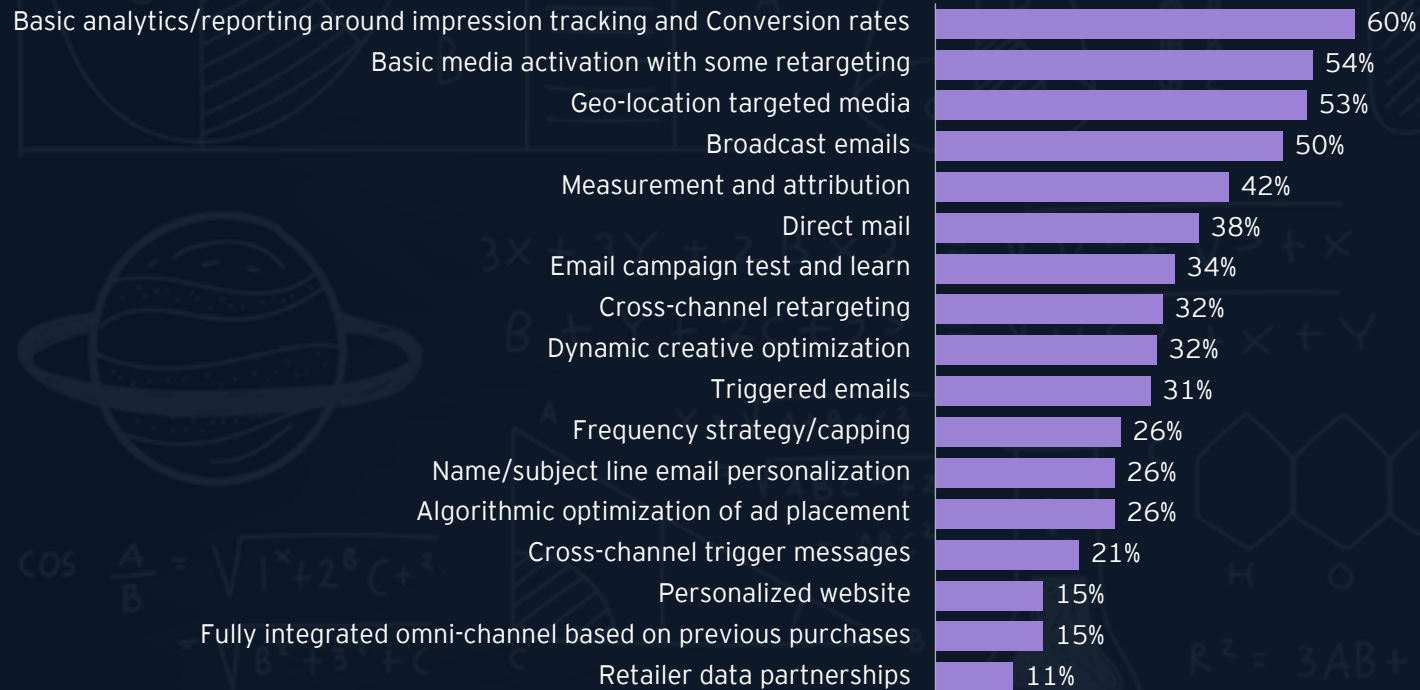
Respondents with usage of data points to a **moderate** or **great extent**

Sectors	Sales and conversion data	Engagement data	Location audience profile data	Advertising exposure data	Online activity profile data	Psychographic
Average of all sectors	**77%**	**73%**	**66%**	**60%**	**61%**	**45%**
Media and entertainment	73%	82%	76%	70%	73%	67%
CPG	92%	77%	62%	69%	62%	54%
Healthcare and pharma	63%	63%	75%	88%	75%	38%
Education	71%	71%	71%	71%	57%	57%
Automobile	90%	70%	70%	60%	70%	40%
Retail and e-commerce	75%	50%	75%	75%	50%	50%
Travel and hospitality	100%	67%	67%	33%	67%	33%
Financial services	73%	73%	55%	45%	50%	32%
Technology	81%	81%	50%	31%	50%	13%
Manufacturing	40%	40%	60%	40%	40%	40%

■ Sector leader   ■ Better than average   ■ Average   ■ Below average   ■ Sector laggard

Consumer data was majorly used for analytics, conversion tracking and location based targeting

Which of the following describe **how** and **where** your organization uses data?

Category	%
Basic analytics/reporting around impression tracking and Conversion rates	60%
Basic media activation with some retargeting	54%
Geo-location targeted media	53%
Broadcast emails	50%
Measurement and attribution	42%
Direct mail	38%
Email campaign test and learn	34%
Cross-channel retargeting	32%
Dynamic creative optimization	32%
Triggered emails	31%
Frequency strategy/capping	26%
Name/subject line email personalization	26%
Algorithmic optimization of ad placement	26%
Cross-channel trigger messages	21%
Personalized website	15%
Fully integrated omni-channel based on previous purchases	15%
Retailer data partnerships	11%

One out of two marketers use consumer data for analytics, conversion tracking and location based targeting

There was an overall increase over prior year in usage of consumer data across communication mediums
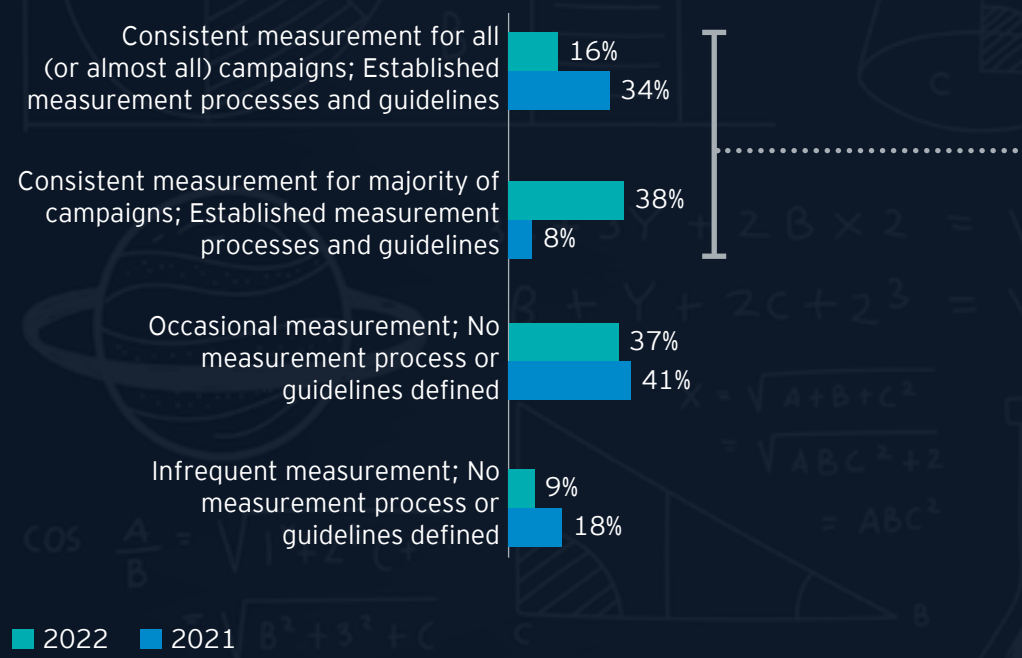
2

ROI measure and attribution

Most Indian marketers saw the benefit of leveraging consumer data for marketing

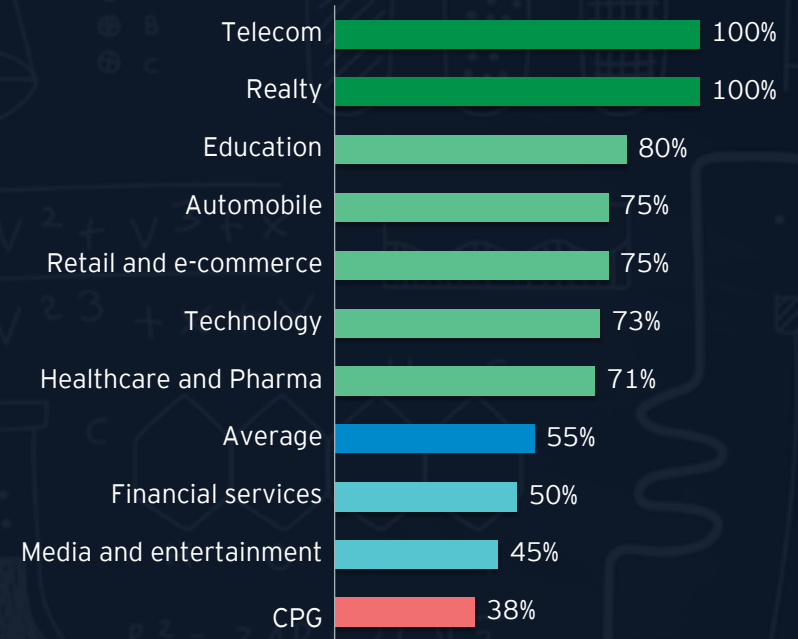but they struggled with robust attribution models

54% of Indian marketers leveraged consumer data for marketing activities

Which of the following best describes how well you **measure the outcome** of marketing campaign?

Consistent measurement for all (or almost all) campaigns; Established measurement processes and guidelines
- 16%
- 34%

Consistent measurement for majority of campaigns; Established measurement processes and guidelines
- 38%
- 8%

Occasional measurement; No measurement process or guidelines defined
- 37%
- 41%

Infrequent measurement; No measurement process or guidelines defined
- 9%
- 18%

■ 2022 ■ 2021

54% 2022 survey result

42% 2021 survey result

Sectoral comparison: Consistent level of measurement for attribution

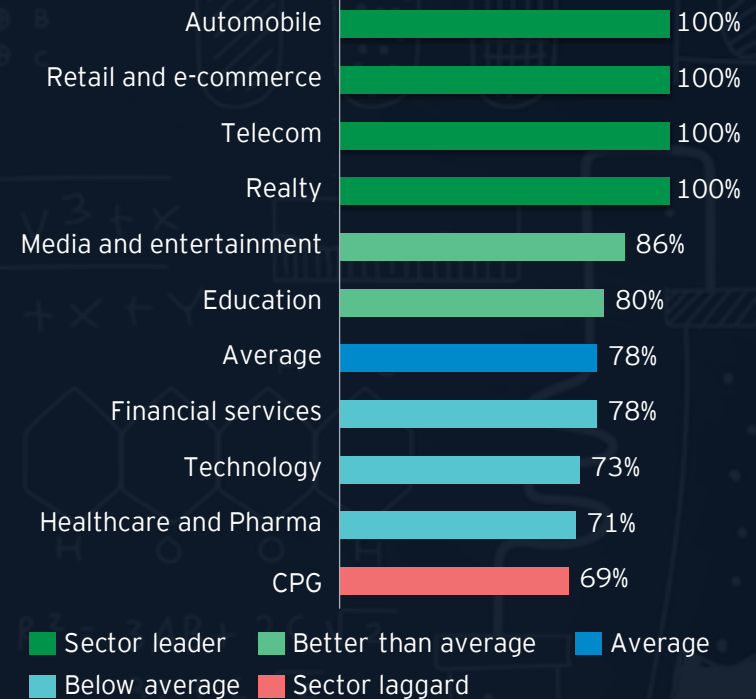| Sector	%
Telecom	100%
Realty	100%
Education	80%
Automobile	75%
Retail and e-commerce	75%
Technology	73%
Healthcare and Pharma	71%
Average	55%
Financial services	50%
Media and entertainment	45%
CPG	38%

■ Sector leader ■ Better than average ■ Average
■ Below average ■ Sector laggard

78% of Indian marketers saw a lift in marketing efficiency due to leveraging consumer data

Based on your organization's ROI measurements, what is the **lift in marketing efficiency** (e.g., higher incremental ROI, lower cost per acquisition) observed from marketing initiatives that leverage consumer data?
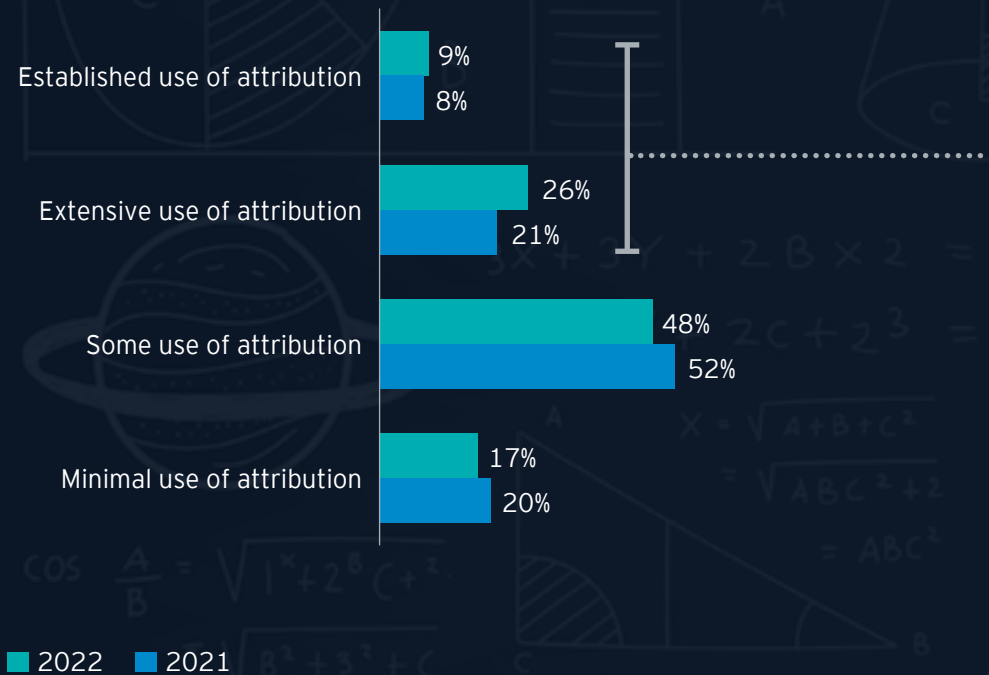
High lift in marketing efficiency from leveraging consumer data in marketing initiatives compared to the expectations of the organization
- 25%
- 19%

Some lift in marketing efficiency from leveraging consumer data in marketing initiatives compared to the expectations of the organization
- 53%
- 50%

Little to no lift in marketing efficiency from leveraging consumer data in marketing initiatives compared to the expectations of the organization
- 9%
- 15%

Marketing efficiency is not measured for consumer data usage in marketing initiatives in relation to ROI measurements
- 13%
- 17%

■ 2022 ■ 2021

78% 2022 survey result

69% 2021 survey result

Sectoral comparison: Lift observed in marketing efficiency

Sector	Lift
Automobile	100%
Retail and e-commerce	100%
Telecom	100%
Realty	100%
Media and entertainment	86%
Education	80%
Average	78%
Financial services	78%
Technology	73%
Healthcare and Pharma	71%
CPG	69%

■ Sector leader ■ Better than average ■ Average
■ Below average ■ Sector laggard

Just **35%** of organizations have extensively used attribution data

Which of the following describes the **status of attribution** in your organization?

Established use of attribution
- 9% (2022)
- 8% (2021)

Extensive use of attribution
- 26% (2022)
- 21% (2021)

Some use of attribution
- 48% (2022)
- 52% (2021)

Minimal use of attribution
- 17% (2022)
- 20% (2021)

■ 2022 ■ 2021

35% 2022 survey result

29% 2021 survey result

Sectoral Comparison: Extensive and established use of attribution

Sector	%
Healthcare and Pharma	57%
Automobile	50%
Retail and e-commerce	50%
Telecom	50%
Realty	50%
Media and entertainment	41%
Education	40%
Technology	36%
Average	35%
Manufacturing	25%
Financial services	22%
CPG	8%

■ Sector leader ■ Better than average ■ Average
■ Below average ■ Sector laggard
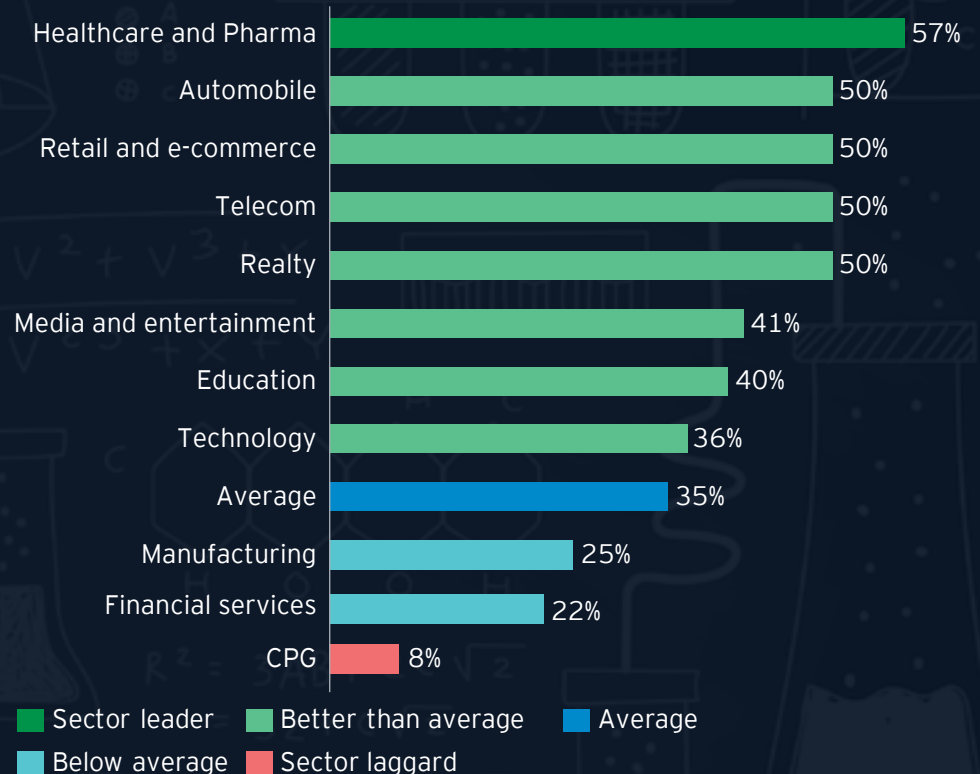
Indian marketers continued to rely on brand trackers and AB testing to support media decisions

On a scale of 1-5, please rate **how much you rely** on using the below tools **to support media decisions**?

2022 results

5 - Extremely reliant and use this tool extensively

1 - We don't rely on this tool and never use it
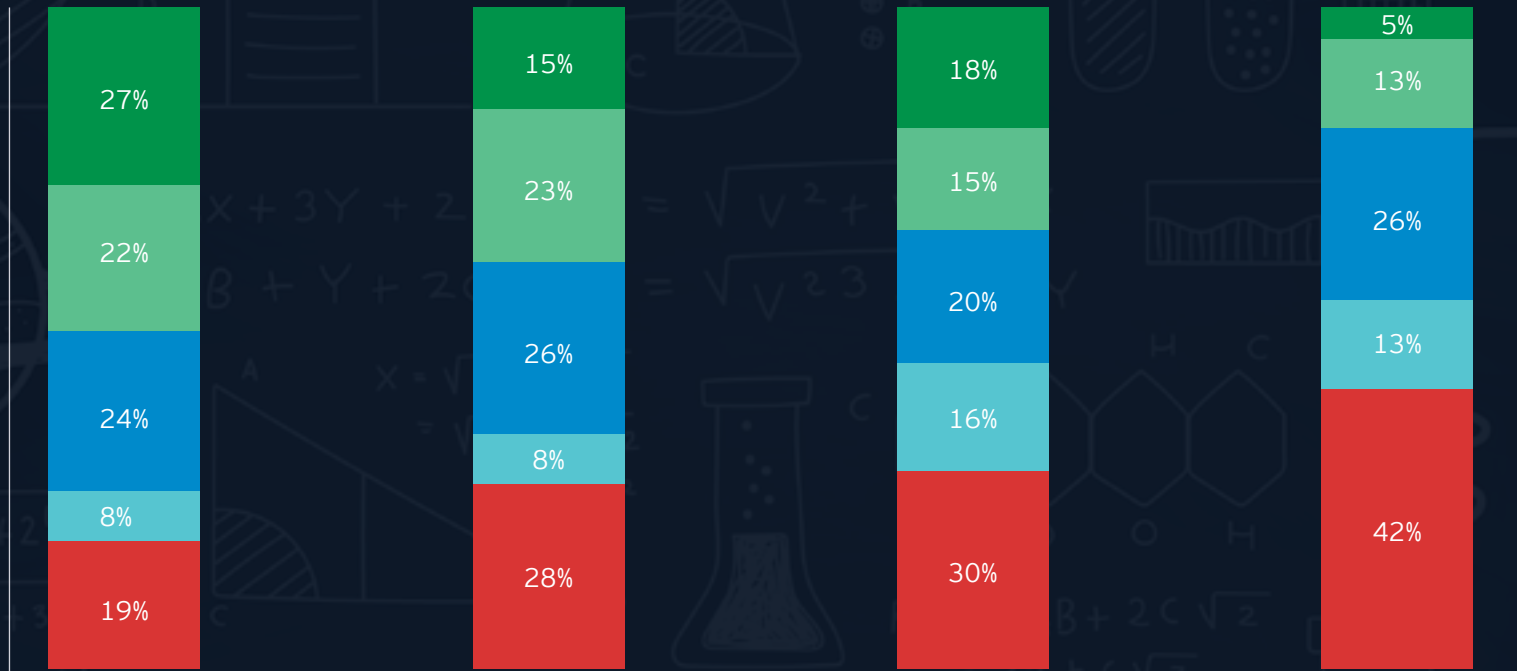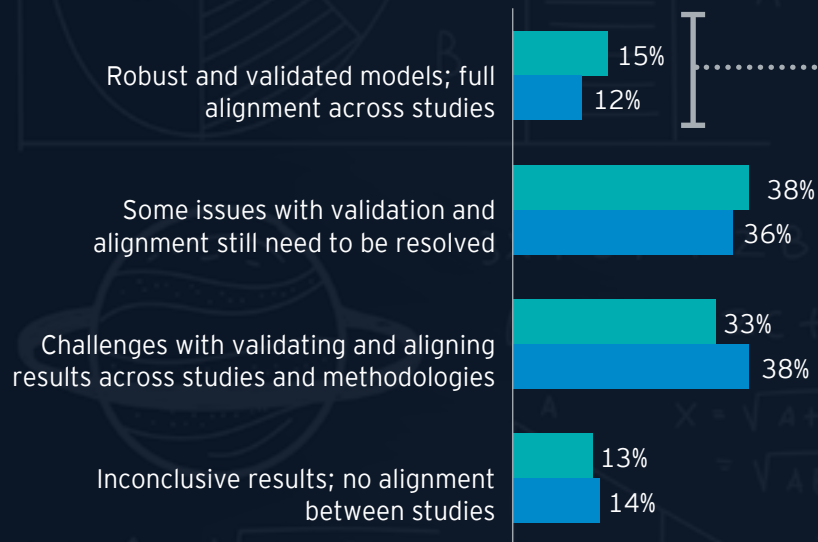
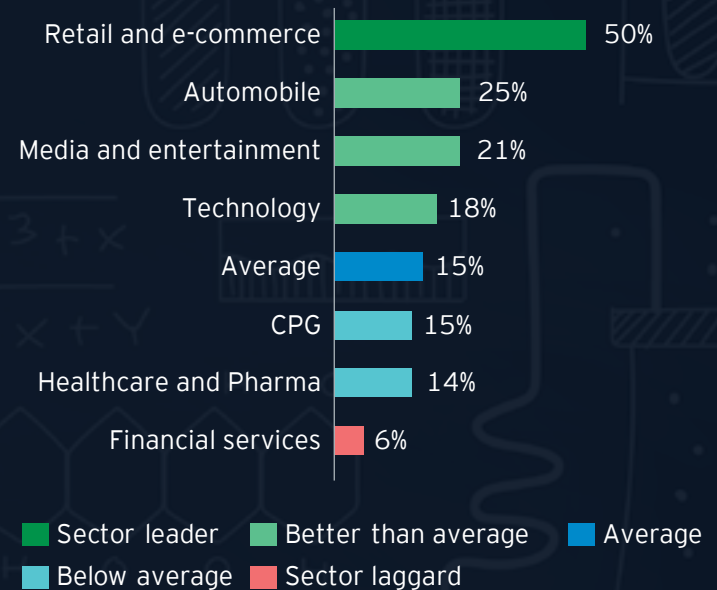|	Brand Trackers	A/B Testing	MMM (Media Mix Modeling)	RCT (Randomized Control tests)
5	27%	15%	18%	5%
4	22%	23%	15%	13%
3	24%	26%	20%	26%
2	8%	8%	16%	13%
1	19%	28%	30%	42%

Only **15%** of the respondents had robust attribution models

Which of the following describes the **status of measurement** and **attribution validation** in your organization?
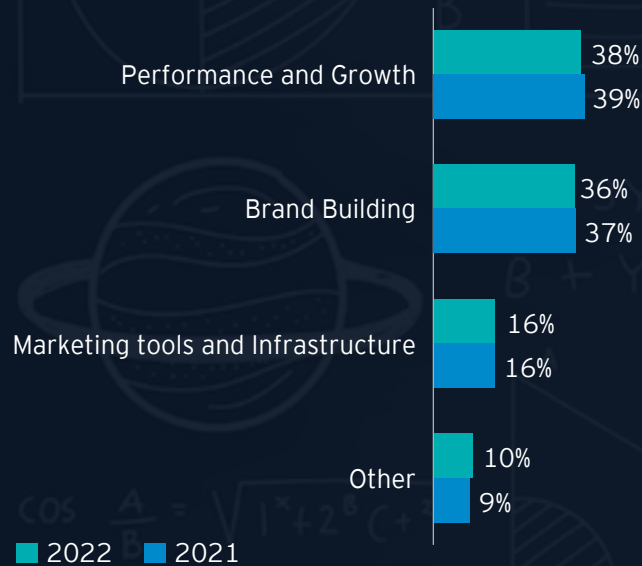
Sectoral Comparison: Robust attribution models

Robust and validated models; full alignment across studies
- 15%
- 12%

Some issues with validation and alignment still need to be resolved
- 38%
- 36%

Challenges with validating and aligning results across studies and methodologies
- 33%
- 38%

Inconclusive results; no alignment between studies
- 13%
- 14%

■ 2022 ■ 2021

Sector	%
Retail and e-commerce	50%
Automobile	25%
Media and entertainment	21%
Technology	18%
Average	15%
CPG	15%
Healthcare and Pharma	14%
Financial services	6%

■ Sector leader   ■ Better than average   ■ Average
■ Below average   ■ Sector laggard

15% 2022 survey result   **12%** 2021 survey result

Performance, growth and brand building continued to be the key focus areas for organizations; Focus required on marketing tools and infrastructure

What **percentage of your marketing budget** for FY21-22 is **expected to be allocated** to each of the following, out of 100%
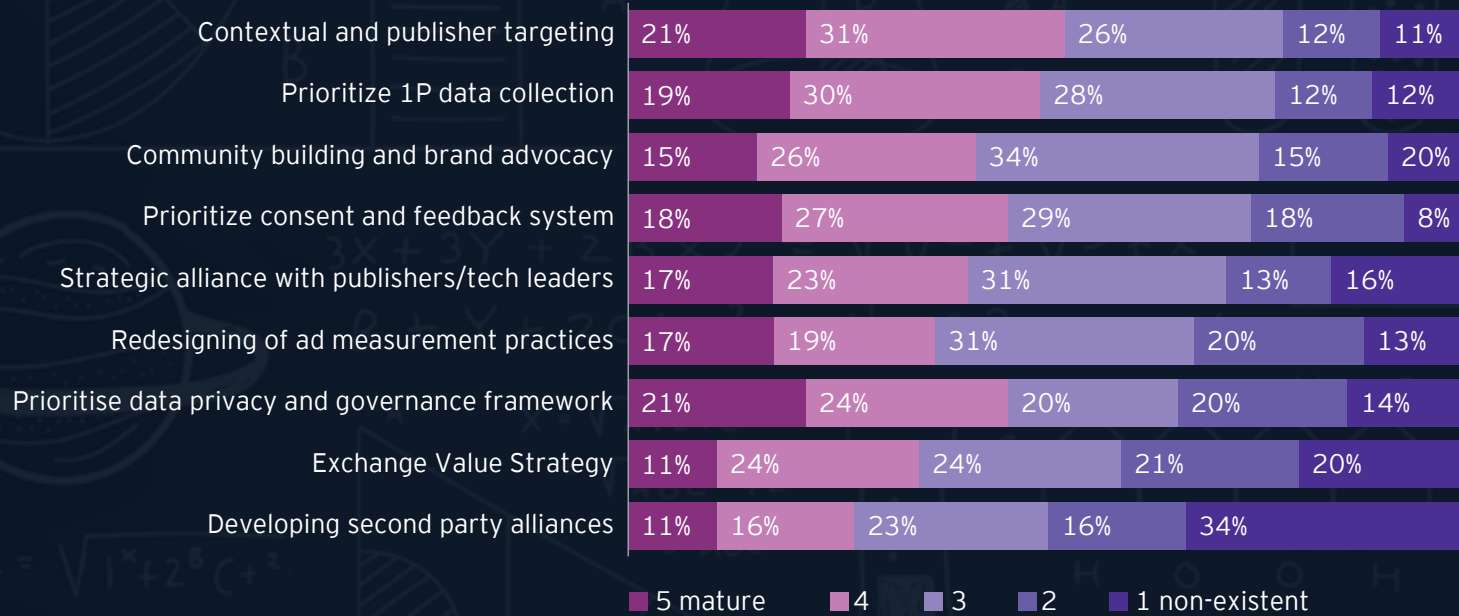
Category	2022	2021
Performance and Growth	38%	39%
Brand Building	36%	37%
Marketing tools and Infrastructure	16%	16%
Other	10%	9%

■ 2022 ■ 2021

Sectoral comparison: Allocation of marketing budget

Sector	Brand building	Performance and growth	Marketing tools and infrastructure	Others
CPG	48%	31%	8%	13%
Healthcare and Pharma	46%	34%	15%	4%
Realty	45%	25%	25%	5%
Media and entertainment	38%	36%	13%	13%
Average	36%	38%	16%	10%
Automobile	34%	49%	14%	3%
Education	33%	49%	10%	8%
Financial services	33%	35%	24%	9%
Retail and e-commerce	30%	44%	18%	9%
Technology	29%	50%	15%	6%
Telecom	28%	38%	20%	15%
Travel and hospitality	20%	50%	30%	
Manufacturing	19%	21%	24%	36%

■ Brand building ■ Performance and growth ■ Marketing tools and infrastructure ■ Others

Organizations are moving towards enriching their 1P data through communities, advocacy and contextual targeting

How mature is your organisation on following strategies & processes, in dealing with cookie less world (on a scale of 1-5, where 1 is non-existent and 5 is mature) ?

Strategy	5 mature	4	3	2	1 non-existent
Contextual and publisher targeting	21%	31%	26%	12%	11%
Prioritize 1P data collection	19%	30%	28%	12%	12%
Community building and brand advocacy	15%	26%	34%	15%	20%
Prioritize consent and feedback system	18%	27%	29%	18%	8%
Strategic alliance with publishers/tech leaders	17%	23%	31%	13%	16%
Redesigning of ad measurement practices	17%	19%	31%	20%	13%
Prioritise data privacy and governance framework	21%	24%	20%	20%	14%
Exchange Value Strategy	11%	24%	24%	21%	20%
Developing second party alliances	11%	16%	23%	16%	34%

5 mature ■ **4** ■ **3** ■ **2** ■ **1 non-existent**

50% marketers have adequate strategies and policies on **contextual and publisher targeting and 1P data collection**

3

Capabilities and skills

A majority of respondents had built martech capabilities or were working towards that goal

Automation, identity management, and next best action are the biggest gaps in martech capabilities

79% of respondents had either built best in class or developed / outsourced martech capabilities

Which of the below best describes your organization's **martech capabilities** (marketing technology, tools and platforms that support marketing and leverage consumer data)?

Organization has developed or sourced industry leading (ahead of peers) martech capabilities (eg, journey orchestration across all channels, next best action in real time, predictive analytics)
- 9%
- 6%

Organization has developed or sourced best in class martech capabilities (eg, cross-channel personalization, data consolidation, MDM, content management or something similar) (eg, advanced analytics, predictive technologies)
- 20%
- 22%

Organization has either developed or currently sourcing core martech capabilities (eg, DMP, Marketing Automation, content management or something similar)
- 50%
- 44%

Organization has clear gaps in basic marketing technology capabilities (eg, DMP, content management)-either built in-house or sourced
- 21%
- 28%

■ 2022 ■ 2021

79% 2022 survey result   **72%** 2021 survey result

➤ **Sectoral comparison** of martech capabilities

Sector	Industry leading / Best in class	Developed	Developing
Retail and e-commerce	75%	25%	
Telecom	50%	50%	
Technology	36%	55%	9%
Media and entertainment	36%	39%	25%
Average	29%	50%	21%
Healthcare and Pharma	29%	57%	14%
Automobile	25%	75%	
Manufacturing	25%	25%	50%
Education	20%	20%	60%
CPG	17%	50%	33%
Financial services	12%	76%	12%
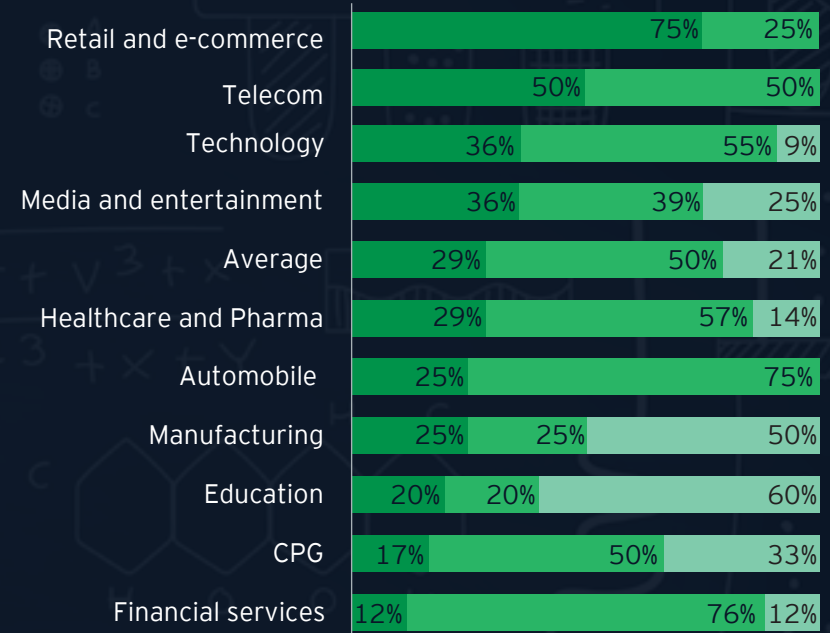
■ Industry leading / Best in class   ■ Developed   ■ Developing

Automation and AI and identity management were the least developed martech capabilities

How advanced is your organization in each of the below capabilities and systems compared to the rest of your industry?

Capability	Ahead of the market	At parity with the market	Not as advanced as the market	We don't have this capability
CRM (Customer Relationship Management)	17%	47%	26%	10%
Analytics & data science	22%	42%	26%	10%
MRM (Marketing Resource Management)	11%	48%	22%	18%
DMP (Data Management Platform/ CDP (Customer Data Platform)/ DSP (Demand Side Platform)	18%	39%	21%	23%
Next Best Action / Journey Orchestration	15%	38%	23%	23%
Identity Management/ ID Graph	13%	36%	29%	22%
Automation/ AI (Artificial Intelligence)/ RPA (Robotic Process Automation)	13%	33%	26%	28%

Analytics and data science, CRM and MRM are capabilities where marketers have focused on leading to its advancement

■ Ahead of the market ■ At parity with the market ■ Not as advanced as the market ■ We don't have this capabilty

Sectoral comparison: retail and e-commerce, and technology were leading sectors in martech maturity and capabilities

Respondents with capabilities **absent** in their organizations or were **not as advanced** as the market

Sectors	Automation / AI / RPA	Identity Management / ID Graph	Next Best Action / Journey Orchestration	DMP / CDP / DSP	Analytics & data science	MRM	CRM
Average of all sectors	**54%**	**51%**	**47%**	**44%**	**36%**	**41%**	**36%**
Retail and e-commerce	25%	33%	33%	25%	25%	25%	0%
Technology	45%	40%	27%	40%	36%	27%	18%
Financial services	56%	44%	31%	38%	31%	29%	24%
Automobile	50%	63%	50%	38%	25%	38%	0%
Media and entertainment	46%	52%	44%	44%	37%	41%	32%
Healthcare and Pharma	50%	50%	60%	43%	20%	80%	80%
Education	60%	80%	60%	80%	40%	60%	60%
CPG (Consumer packaged goods)	83%	67%	83%	58%	58%	58%	83%
Manufacturing	100%	75%	75%	50%	75%	75%	75%

■ Sector leader   ■ Better than average   ■ Average   ■ Below average   ■ Sector laggard

40% of Indian marketers had adequate access to advanced analytics and data science resources

Which of the following describes your marketing organization's access to advanced analytics and data science resources?

Marketing organizations have abundant access to data scientists that not only meet our current needs but also allow us to build for the future
- 2022: 11%
- 2021: 10%

Marketing organizations have sufficient access to data scientists that usually meet our current needs
- 2022: 29%
- 2021: 25%

Marketing organization has a small team of data scientists, that do not fully meet our needs
- 2022: 36%
- 2021: 33%

Marketing organization has limited or no access to data scientists
- 2022: 25%
- 2021: 32%

■ 2022 ■ 2021

40% 2022 survey result   **35%** 2021 survey result

Sectoral comparison: Adequate access to advanced analytics and data science resources to meet their needs

Sector	%
Telecom	100%
Retail and e-commerce	75%
Technology	73%
Realty	50%
Media and entertainment	46%
Average	40%
Automobile	38%
Financial services	35%
Manufacturing	25%
Education	20%
CPG	17%

■ Sector leader   ■ Better than average   ■ Average
■ Below average   ■ Sector laggard

4
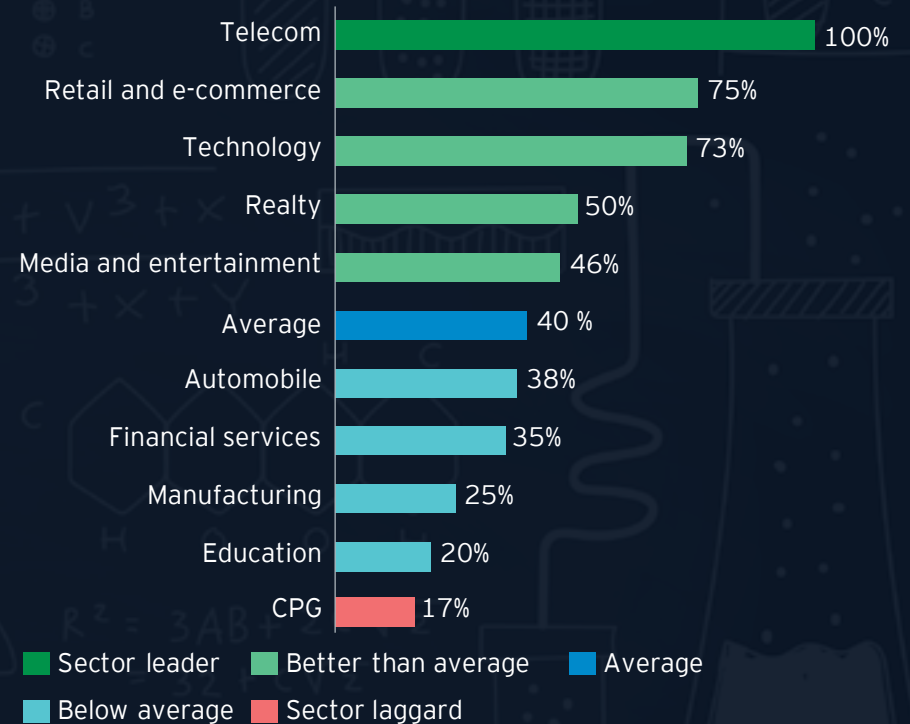
Data ownership, governance, and integration

Indian marketers had defined ownership and management strategies for 1P consumer data

however there was little / no integration of 1P and 3P data, limited employee access to data, and absence of cross fishing rules

66% of Indian marketers had defined ownership and management strategies for 1P consumer data

Which of the following best describes how **first party (1P)** consumer data is **owned and managed** in your organization?

Ownership and management of consumer data and strategy is defined and accepted, roles are clear and functional
- 26%
- 27%

Adequate ownership of organization's consumer 1P data and management strategy is defined as a priority
- 40%
- 31%

Fragmented ownership and management of consumer data exists in silos among various levels of leadership
- 27%
- 38%

There are conflicts of interest in my organization on who owns and manages 1P consumer data
- 7%
- 4%

■ 2022 ■ 2021

66% 2022 survey result   **58%** 2021 survey result

Sectoral comparison: Defined ownership and management strategies for 1P consumer data

Sector	%
Telecom	100%
Healthcare and Pharma	86%
Financial services	82%
Education	80%
Retail and e-commerce	75%
Technology	73%
Average	66%
Automobile	63%
Media and entertainment	52%
CPG	50%
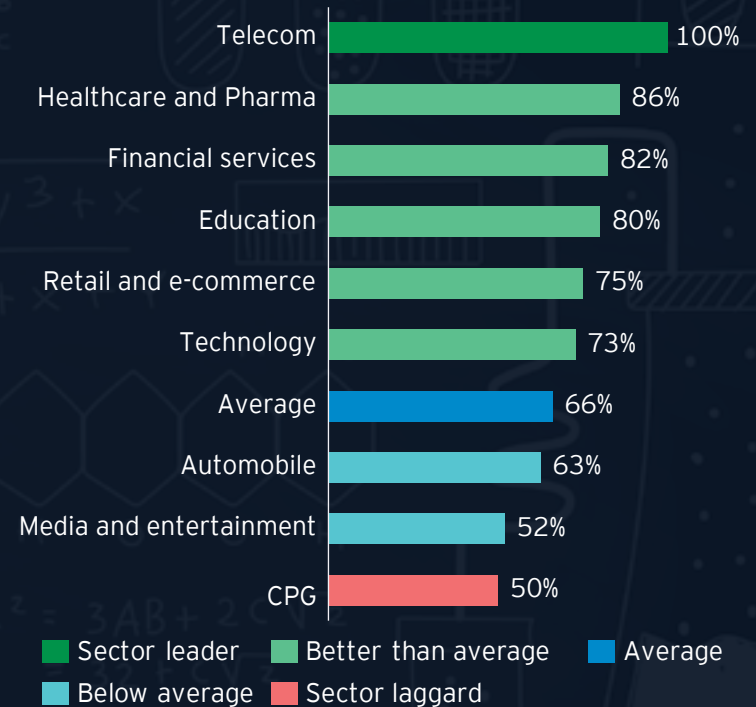
■ Sector leader ■ Better than average ■ Average
■ Below average ■ Sector laggard

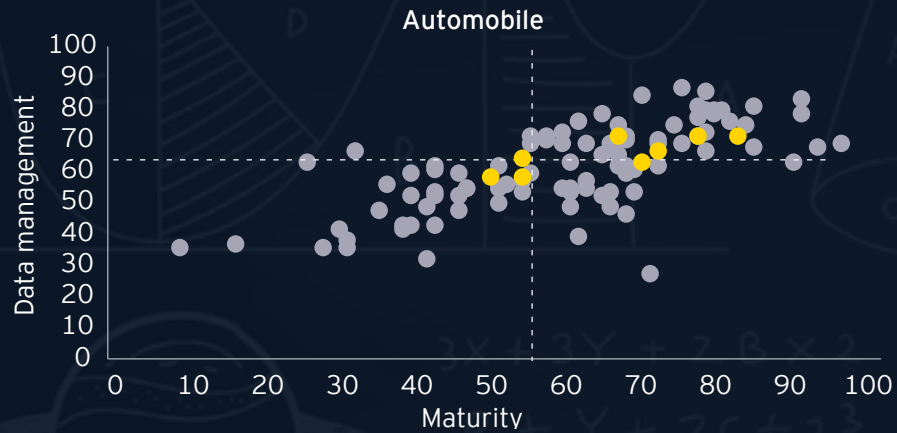# 55% of Indian marketers had little / no integration of their 1P and 3P data with limited employee access

Which of the following best describes how effectively your data management systems for **1P** and **3P** consumer data **are integrated and accessible** at an organizational level?

Description	2022	2021
Data systems are completely centralized on a single platform, the organization is fully operating in a cloud environment, and all data is easily accessible and userfriendly across all employees in the organization	12%	14%
Organization is in the process of converting legacy data systems into consolidated and centralized cloud platforms and most employees of the organization can easily access consumer data in a friendly, easy to use way	33%	26%
Data is somewhat integrated onto one platform (e.g., 360 view), and some employees of the organization can easily access consumer data	33%	35%
Legacy data systems still operate in silos with little to no integration for business/marketing needs	22%	25%

■ 2022 ■ 2021

55% 2022 survey result   **60%** 2021 survey result

Sectoral comparison: Lack of integration of 1P and 3P data with **limited** employee access

Sector	Value
Manufacturing	100%
Education	80%
Media and entertainment	76%
CPG	75%
Average	55%
Automobile	50%
Retail and e-commerce	50%
Financial services	41%
Healthcare and Pharma	29%
Technology	18%

■ Sector leader ■ Better than average ■ Average
■ Below average ■ Sector laggard
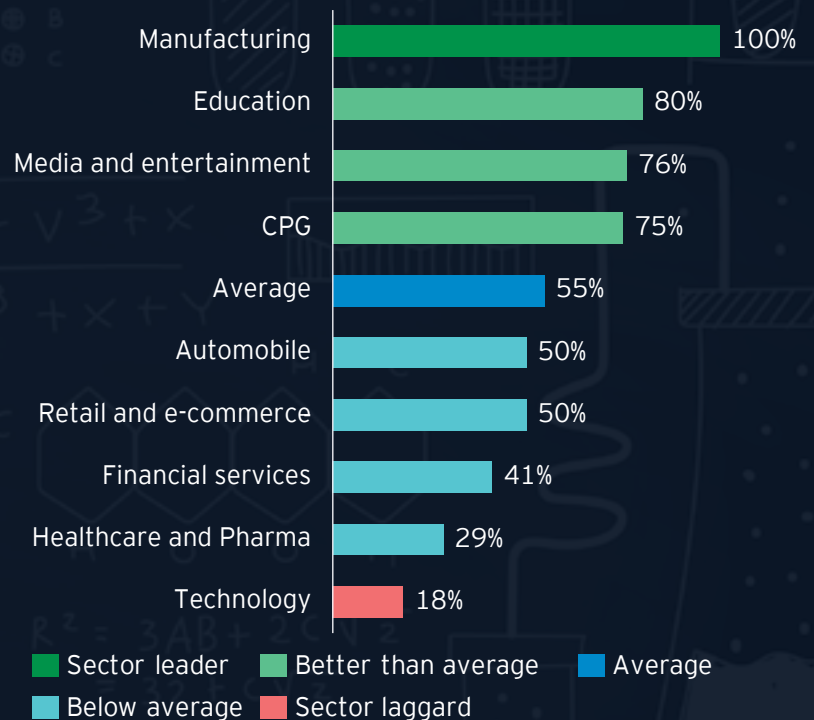
38% of Indian organizations had cross-fishing rules defined for sharing of consumer data between brands which grew from last year

Does your organization have **clearly defined cross-fishing** (ability to share consumer data across brands within an organization for extended activation) **rules and governance** for brands?

Detailed definition of cross-fishing rules and governance process for brands at both the division and enterprise levels
- 11% (2022)
- 9% (2021)

Defined cross-fishing rules and governance structure for brands at the enterprise level
- 27% (2022)
- 23% (2021)

Some defined cross-fishing rules across brands at the enterprise level, but no clear governance structure
- 34% (2022)
- 35% (2021)

No clearly defined cross-fishing rules for brands across the organization
- 28% (2022)
- 33% (2021)

■ 2022 ■ 2021

38% 2022 survey result

32% 2021 survey result

Sectoral comparison: Clearly defined cross-fishing rules and governance for brands

Sector	%
Healthcare and Pharma	57%
Retail and e-commerce	50%
Telecom	50%
Technology	45%
CPG	42%
Education	40%
Average	38%
Financial services	35%
Media and entertainment	32%
Automobile	25%

■ Sector leader   ■ Better than average   ■ Average
■ Below average   ■ Sector laggard
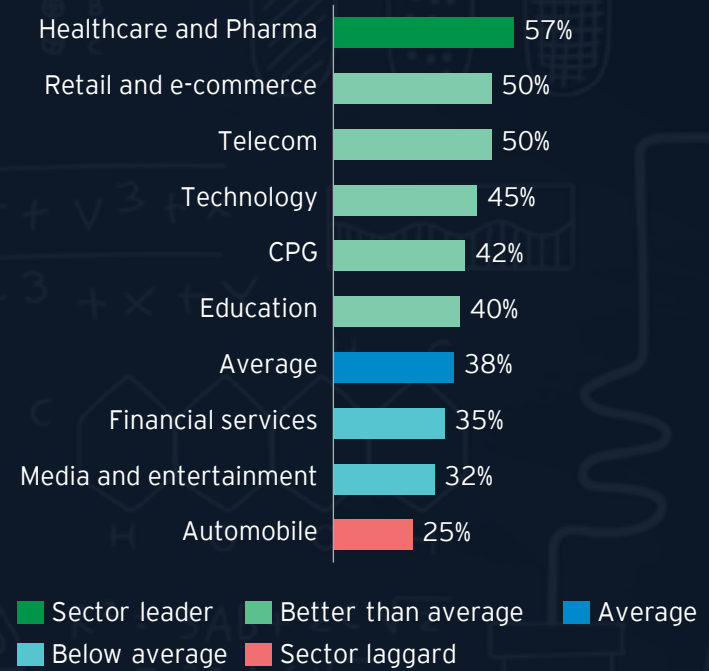
84% of respondents believed they had adequate policies and processes in place to safeguard consumer data

Which of the following describes the **processes and procedures** in place at your organization to ensure consumer data is **protected and secure from fraud**?

Organization has hired a Chief Security Officer (or equivalent)
- 11%
- 9%

There are clear internal policies and procedures in place that safeguard and protect consumer data
- 32%
- 32%

Organization has made adequate investment in advanced firewall technology and has plans and processes in place in the event of a data breach
- 40%
- 48%

Sensitive consumer data (PII) could be better protected from fraud
- 16%
- 11%

■ 2022 ■ 2021

84% 2022 survey result

89% 2021 survey result

Sectoral comparison: Adequate policies and processes to safeguard consumer data

Sector	%
Financial services	100%
Automobile	100%
Retail and e-commerce	100%
Telecom	100%
Technology	91%
Media and entertainment	88%
Healthcare and Pharma	86%
Average	84%
CPG	50%
Education	40%
Manufacturing	33%
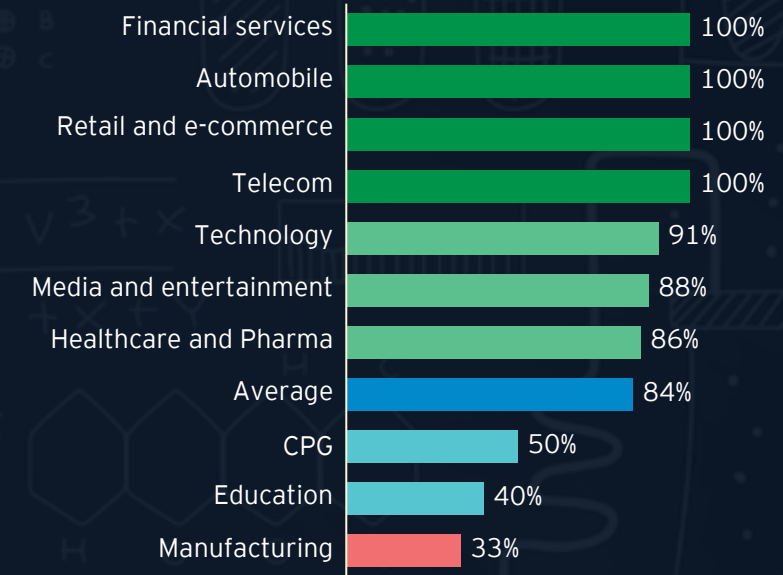
■ Sector leader   ■ Better than average   ■ Average
■ Below average   ■ Sector laggard

Archetypes - focus sectors

Media and Entertainment

Financial services

CPG

Technology

Legend: Sector in focus, Other sectors

Axes: Maturity (x-axis), Data management (y-axis)

Archetypes - focus sectors

Legend: Sector in focus, Other sectors

Automobile — X-axis: Maturity, Y-axis: Data management

Healthcare and Pharma — X-axis: Maturity, Y-axis: Data management

Retail and e-commerce — X-axis: Maturity, Y-axis: Data management

Education — X-axis: Maturity, Y-axis: Data management

Archetypes - focus sectors

Remaining sectors

Data management (y-axis): 0, 10, 20, 30, 40, 50, 60, 70, 80, 90, 100

Maturity (x-axis): 0, 10, 20, 30, 40, 50, 60, 70, 80, 90, 100

Legend:
- Others
- Manufacturing
- Telecom
- Realty
- Travel & Hospitality

Methodology

This report reflects the findings from our survey of CEOs and CMOs. The results of the survey, including sectoral analysis, will therefore be impacted by the type and nature of respondents and their level of maturity

Responses received from survey respondents have not been verified. They were collated and aggregated (or averaged where required) to provide analysis. Responses of ''don't know'' were removed to determine percentages. Responses were grouped based on the sector selected by respondents. The survey was administered during May to July 2022.

Glossary

1P	First Party
3P	Third Party
AI	Artificial Intelligence
CDP	Customer Data Platform
CPG	Consumer Packaged Goods
CRM	Customer Relationship Management
DMP	Data Management Platform
DSP	Demand Side Platform
eCom	eCommerce
Martech	Marketing Technology
MDM	Master Data Management
MMM	Media Mix Modelling
MRM	Marketing Resource Management
PII	Personally Identifiable Information
RCT	Randomized Control Tests
ROI	Return on Investment
RPA	Robotics Process Automation

Acknowledgements

MMA's commitment to the future of marketing

Consisting of over 800-member companies globally and 15 regional offices, the MMA is the only marketing trade association that brings together the full ecosystem of marketers, martech providers and sellers working collaboratively to architect the future of marketing, while relentlessly delivering growth today. Led by CMOs, the MMA helps marketers lead the imperative for marketing change in ways that enable future breakthroughs while optimising current activities.

The MMA is committed to science and questioning and believes that creating marketing impact is steeped in constructively challenging the status quo, encouraging business leaders to aggressively adopt proven, peer-driven and scientific best practices, without compromise.

The MMA invests millions of dollars in rigorous research to enable marketers with unassailable truth and actionable tools. By enlightening, empowering, and enabling marketers, the MMA shapes the future of modern marketing propelling business growth. Anchoring the MMA's mission are four core pillars; to cultivate inspiration by driving innovation for the Chief Marketing Officer; to build marketing capabilities for marketing organizations through fostering know-how and confidence; to champion the effectiveness and impact through research providing tangible ROI measurement; and advocacy.

The MMA's global headquarters are located in New York with regional operations Asia Pacific (APAC), Europe/Middle East/Africa (EMEA) and Latin America (LATAM).
For more information see www.mmaglobal.com

EY's Marketing Advisory Services (MAS) making media spends work harder for the brand

Marketing plays a critical role in business growth. MAS helps marketing teams to contribute toward organizational growth by optimizing marketing function and navigating changes brought about by digital disruption.

A dedicated 60+ member global team of media planners, digital media specialists, and marketing professionals to deliver quality service; our team has collective experience of delivering efficiencies and effectiveness to leading global brands that constitute ~40% of Indian ad spends.

Our team has capabilities and experience across sectors like CP, FMCG, Auto, BFSI and government. We have assisted brands in setting up industry leading practices, technology led assurance for digital and traditional spends, mar-tech advisory, ad-production advisory, ASCI compliance and marketing automation. We have proven credentials, positioning us to have an independent point of view of the advertise, the agency, and the media owner.

EY's vision is to build a better working world by improving agency-brand relationships and helping our clients achieve business goals.

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