



# Masters Circle Survey Results

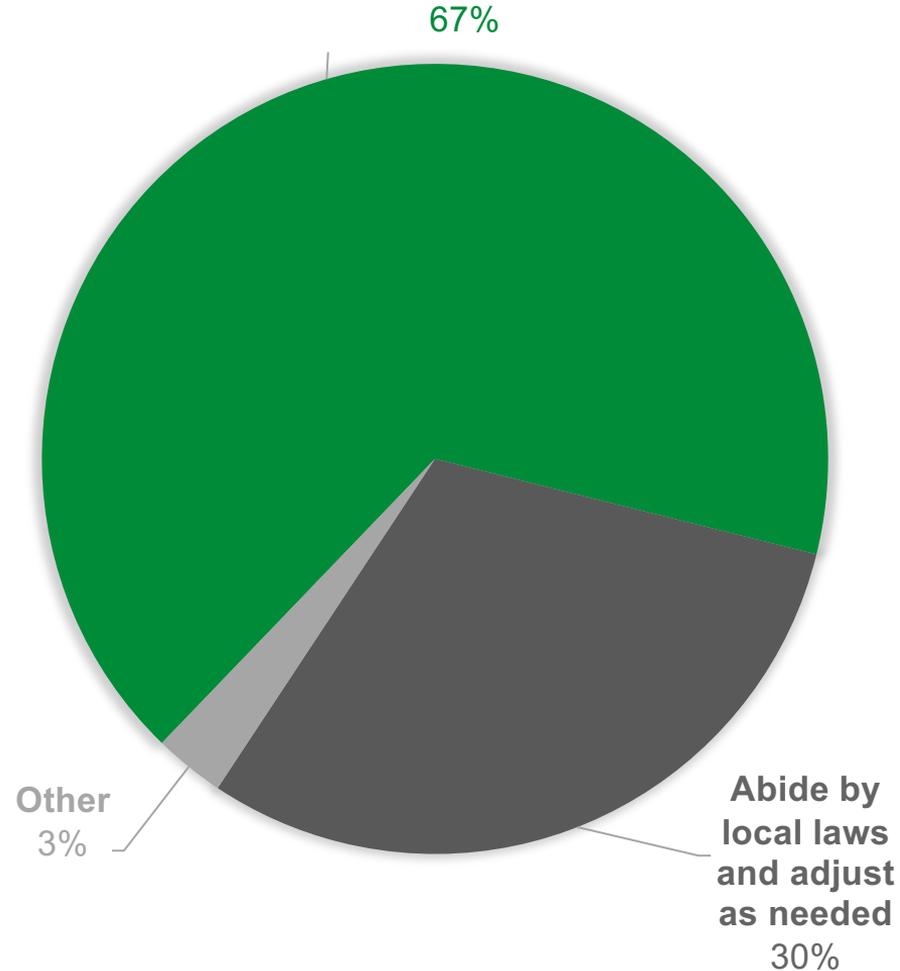
This 2021 flash survey focused on CMO's awareness of platform plans to limit the use of third-party data and their preparedness to respond with more effective uses of first-party strategies and other industry solutions being proposed.

Given the various privacy regulations around the world, do you see the need for a single global standard in seeking consumers' consent to market to them or do you prefer to abide by local laws in meeting your business objectives, adjusting as markets evolve?

81%

of respondents in favor of a global standard would you like to see the ANA take the lead in helping develop and implement.

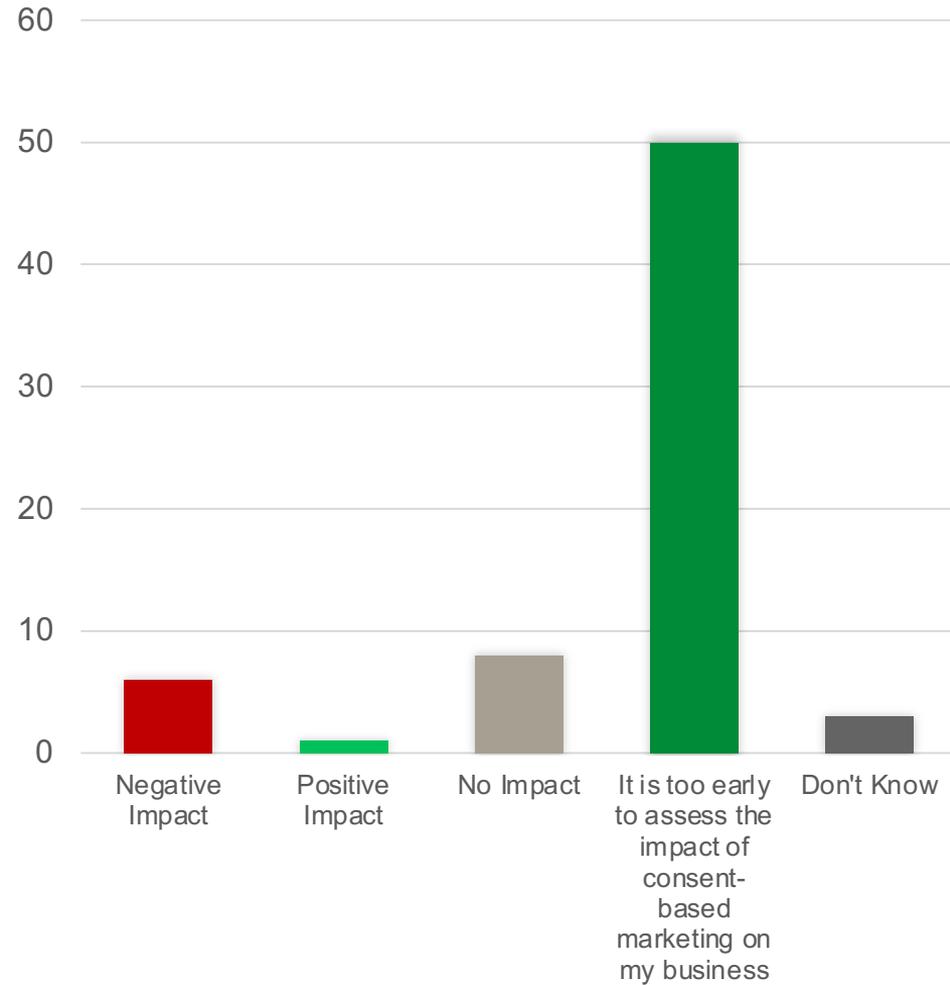
## We need a global standard



Has the recent shift from permission-based to consent-based marketing on some mobile and connected TV devices already had a noticeable impact on your business?

74%

say it is too early to tell.

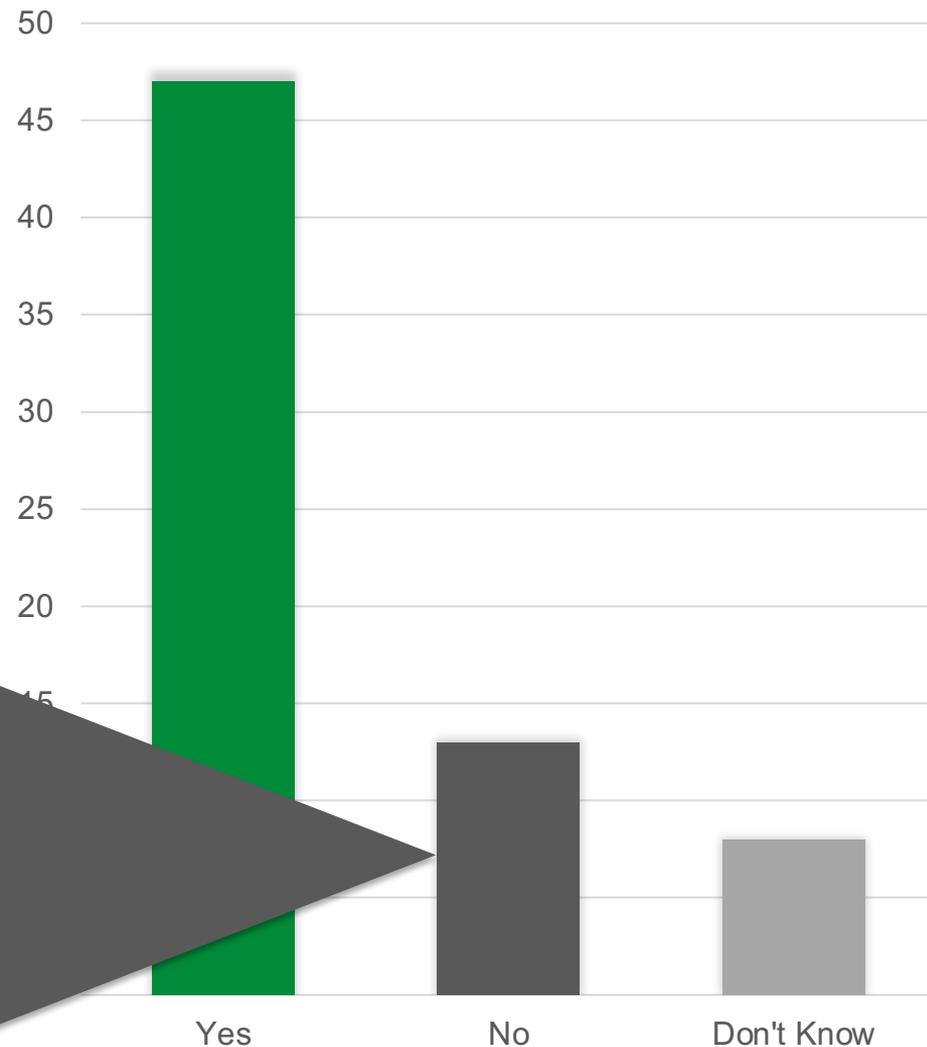


**“Consent-based marketing, cookie-less environment, data quality and availability within my organization—I would like to know that we’re leveraging best practices.”**

Do you currently have a 1st Party Data strategy in place?

96%

of respondents with a 1<sup>st</sup> party data strategy say it is managed in-house.



Intent to develop a 1st Party Data strategy in the near future



**“...we are fairly unsophisticated when it comes to technology and new state marketing data. We are building marketing tech stack and data capabilities but it seems we are flying blind at some level, building the car while we are driving it.”**

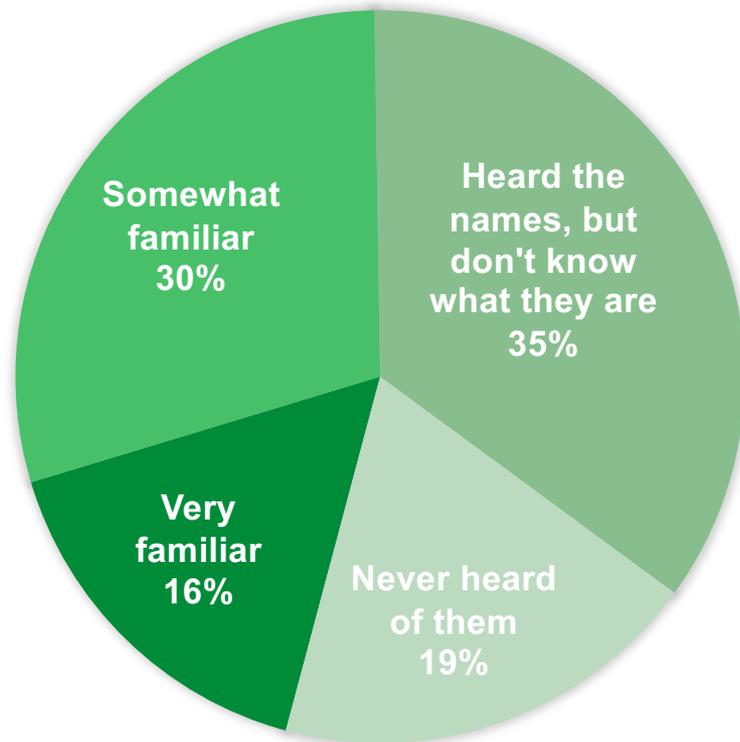
How familiar are you with Google's proposed FLoC and FLEDGE solutions as they plan to deprecate the use of 3rd party cookies in 2022?

## Less than half

are very familiar or somewhat familiar.

87%

would like to see the ANA take a lead in facilitating a consistent and transparent testing process.



**“[The Cookie-less future] will have significant impact on our ability to reach consumers relevantly and efficiently, and could have huge impacts on our marketing spend needs”**

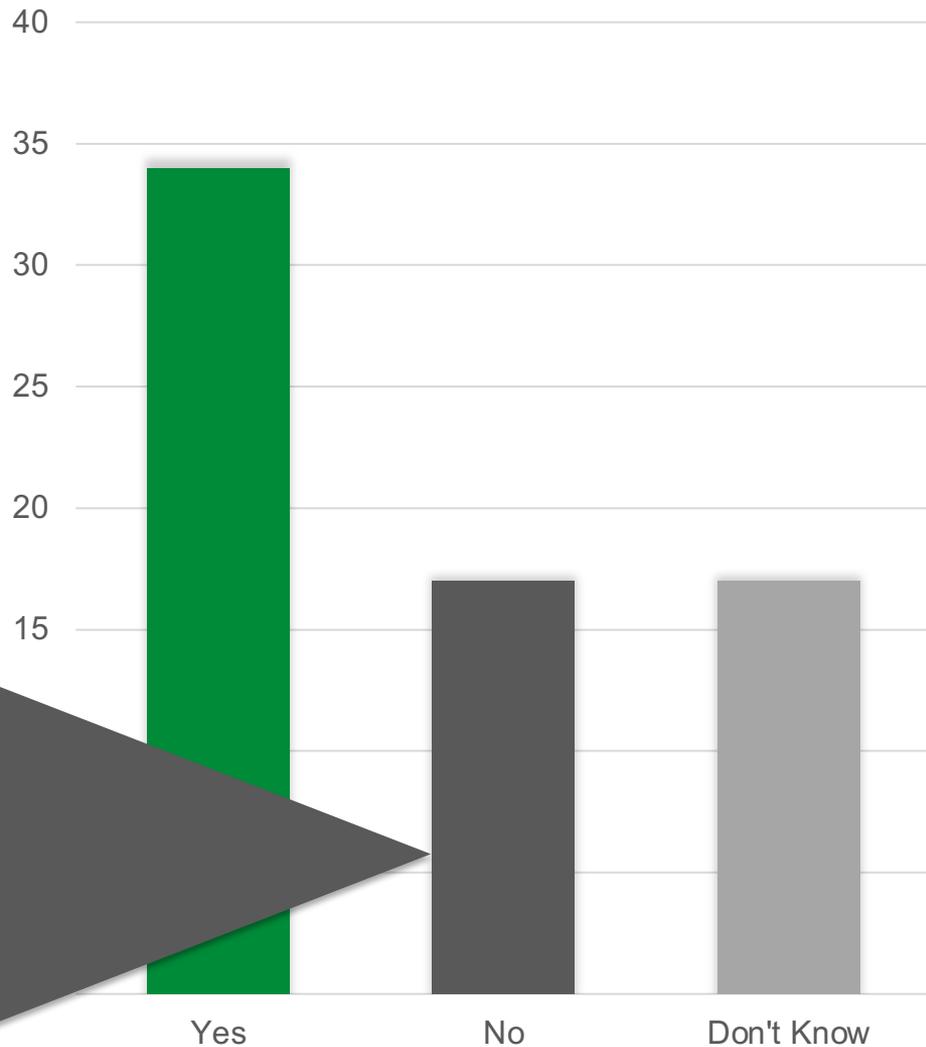
Do you currently have a vendor compliance program in place to track whether your partners are aware of and abiding by the local privacy laws?

88%

are satisfied with their current vendor compliance program.

Only 1/3 of respondents intend on putting a vendor compliance program in place in the next 6 months.

Yes	33%
No	33%
Don't Know	33%



What industry-related challenge is keeping you up at night? How does this issue affect your job function and/or organizational growth?

“Signal loss and global policy reform”

“Cookie less future, 1st party data, precision marketing, In-housing media capabilities”

“3rd party and 1st party data solutions”

“Moving too slow on integrating customer data platforms”

“Move from content driven long-term engagement to short-term data-driven sales peaks. Too much talk about ‘digital transformation and data’ too little focus on trust and quality of engagement”

“Shift in consumer behavior is limiting the amount of time available to tell brand stories in known/traditional formats (e.g. decline in TV supply, limited time spent with brand digital content).

We have to completely rethink what ‘advertising’ means to our consumers and organization...”

“Data....it's a monster”