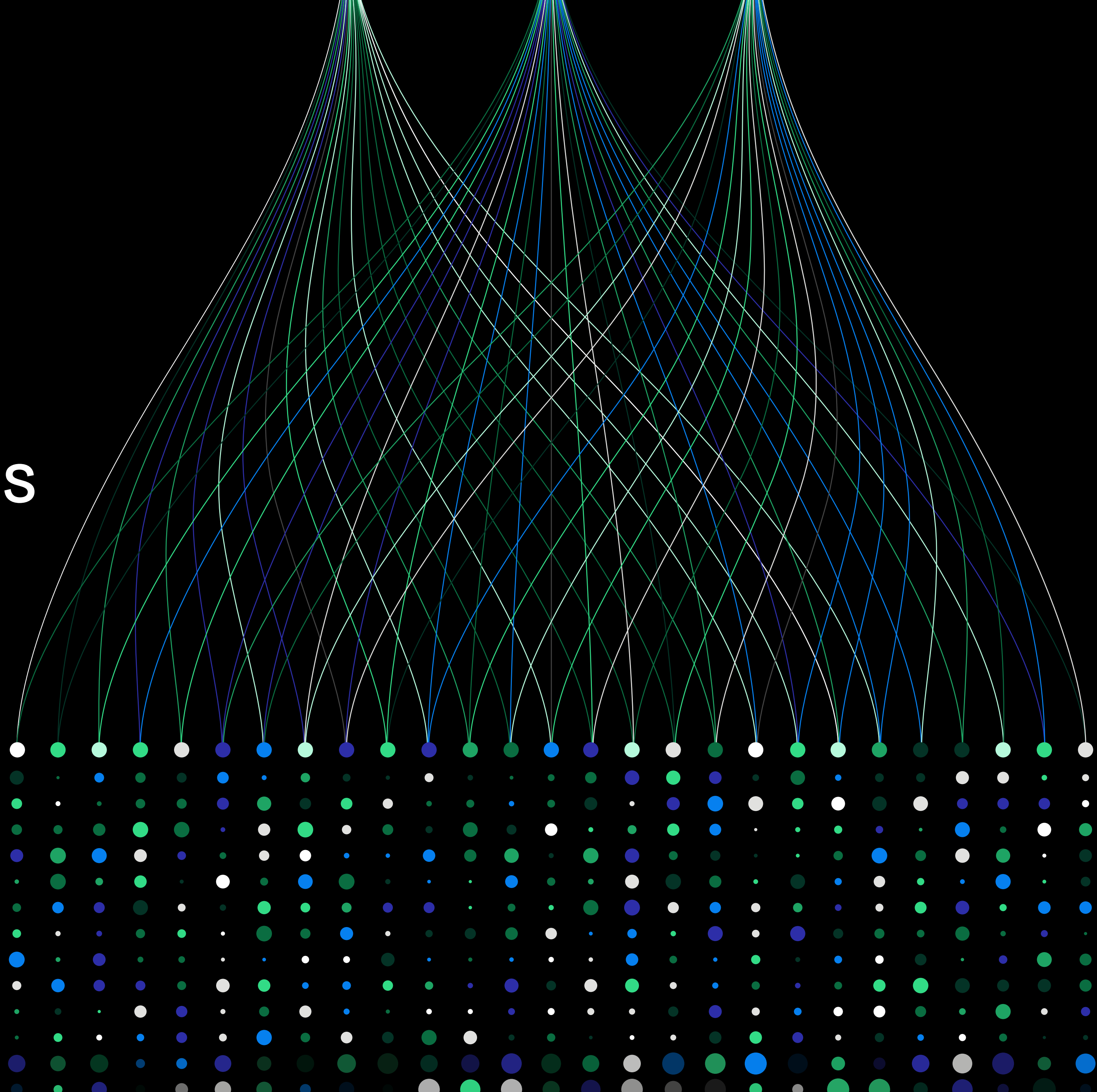


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AI and Other Top Trends in Data Collaboration and Clean Rooms



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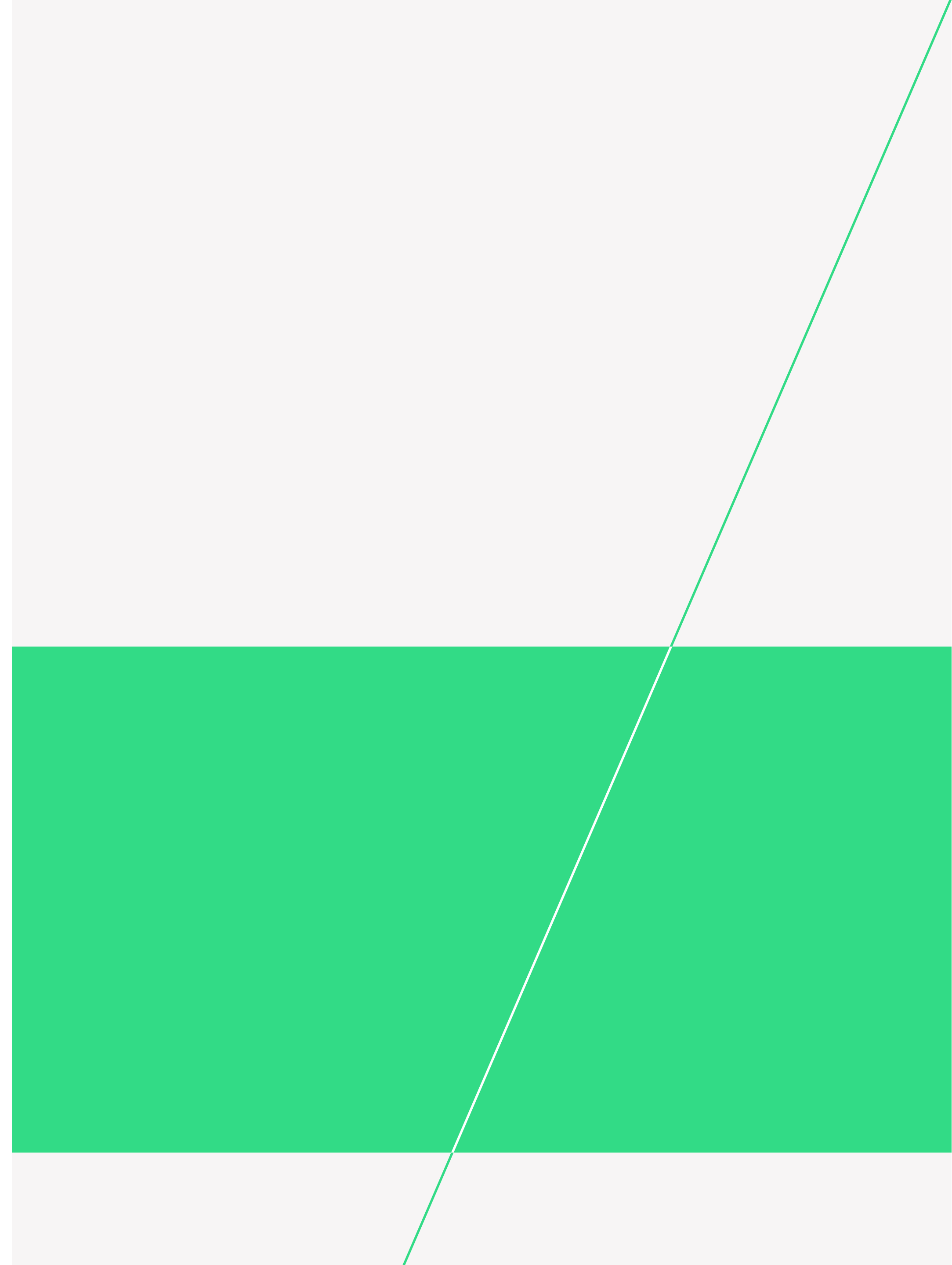
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Introduction

We’re living in a remarkable time for data collaboration. Driven by a critical need to leverage data to unlock new brand and business value, organizations across industries have prioritized initiating or expanding data collaboration by adopting data clean room solutions and growing data partnerships.

As data collaboration spreads beyond marketing use cases to deliver value in diverse sectors, business and technical teams look to modern data clean rooms to accelerate analytic tasks and power machine learning models. Meanwhile, AI has moved to the forefront both as a use case and as a potential enabler of dramatically simpler data operations.

Much has changed in the 12 months since we last surveyed a diverse group of companies across the data collaboration space. We dig into the important trends in the pages that follow.

Key Findings

- 1 With continuing widespread adoption, data collaboration is now mainstream
- 2 Data collaboration is expanding beyond marketing to new industries and use cases
- 3 AI is transforming data collaboration use cases — and data collaboration itself



99% OF ORGANIZATIONS PLAN TO CONTINUE OR INCREASE DATA COLLABORATION ACTIVITIES IN THE COMING YEAR



The notion of being able to leverage your data, as a brand, without having to actually move or share your data is a really interesting concept. It allows you to maintain control and have that protection of your data, and what's unique to you, but also be able to leverage it within the ecosystem.

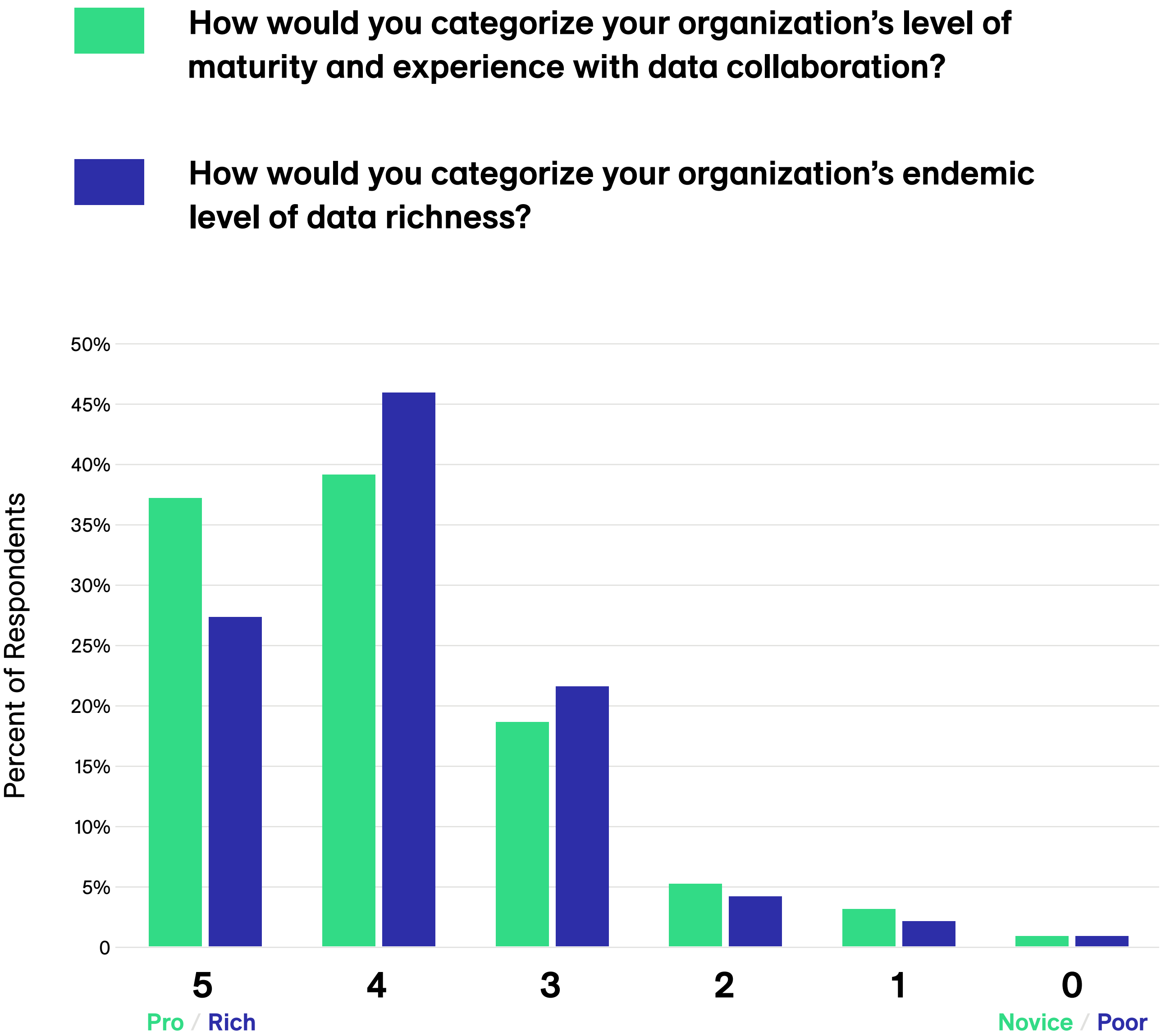
Krystal Olivieri / CEO North America / Choreograph (GroupM / WPP)

Initiatives

In our latest survey conducted by Marketing Dive, 75% of companies consider themselves experienced with data collaboration, and many see themselves as data-rich. Nevertheless, virtually all want to maintain or expand their data collaboration efforts going forward.

As data continues to grow in importance for businesses across industries, IT leaders know that building better data sets and driving value from data analytics is not just an imperative — it’s an ongoing task. Thus, virtually all companies surveyed plan to maintain or grow their data collaboration initiatives in the coming year, regardless of their self-reported data maturity.

Whether your business is looking to monetize valuable data stores, get smarter with data to make better use of it, or enrich relatively nascent data resources, data collaboration is a continuing need at every level of data maturation.





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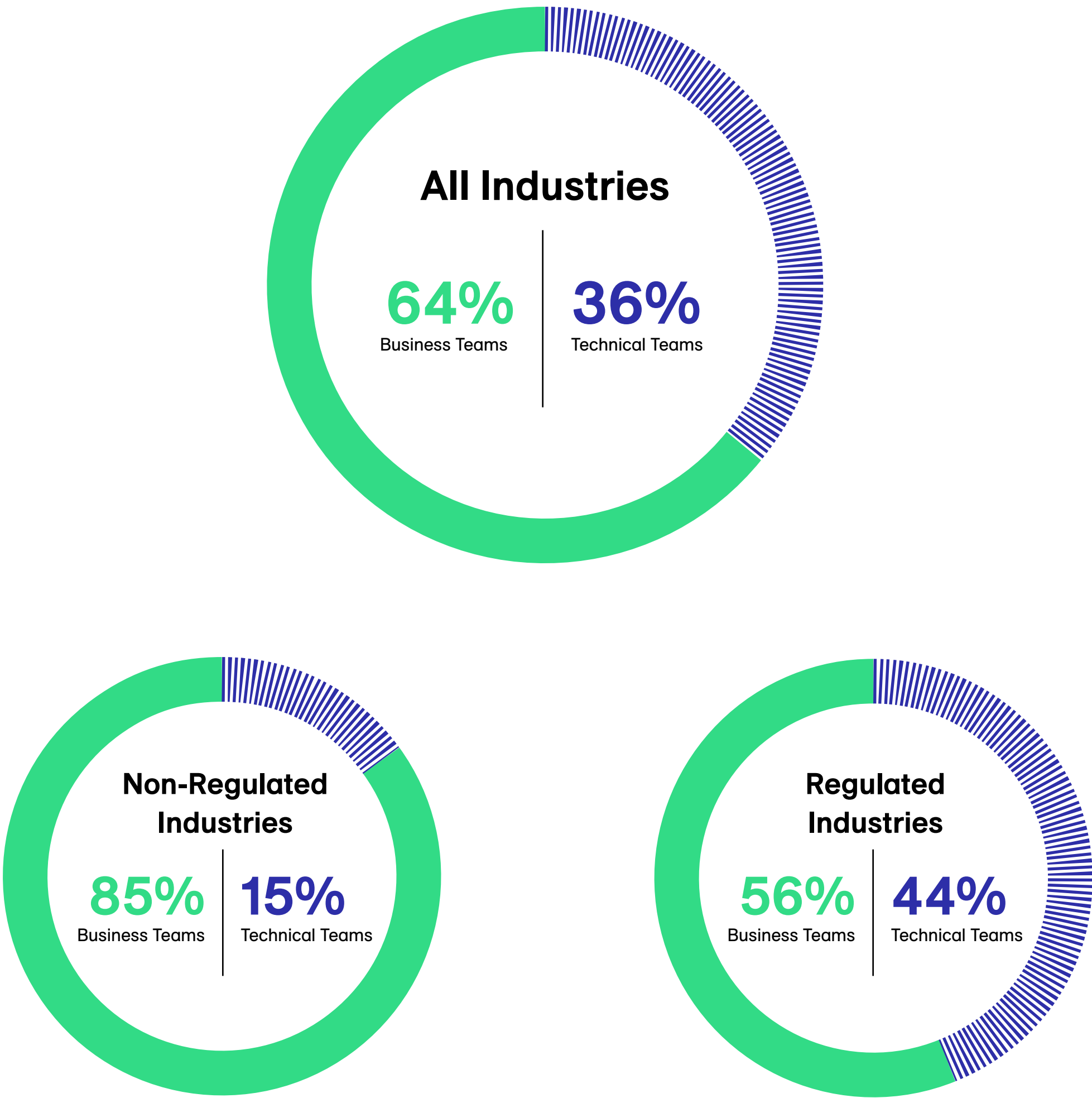
[Data collaboration] gives us a depth and breadth of data to work with... that allows us to understand consumers in new and interesting ways, and create very robust data sets.

Shenan Reed / SVP, Head of Media / L'Oréal

Business and technical teams share responsibility for data collaboration, but the breakdown is instructive

In our previous report, we predicted growth in adopting increasingly easy-to-use data collaboration tools by business teams, and that’s quite evident today. Overall, 64% of those responsible for data collaboration are business users. That number is even higher — 85% — in traditional strongholds of data collaboration such as retail, CPG, and media and entertainment.

But here’s where it gets interesting. In regulated industries such as banking, healthcare, and life sciences, the split between business and technical teams owning data collaboration is much closer (56% to 44%, respectively), suggesting a balanced organizational interest in driving business outcomes via vetted technical solutions (think confidential computing) to support the highest levels of privacy and compliance.



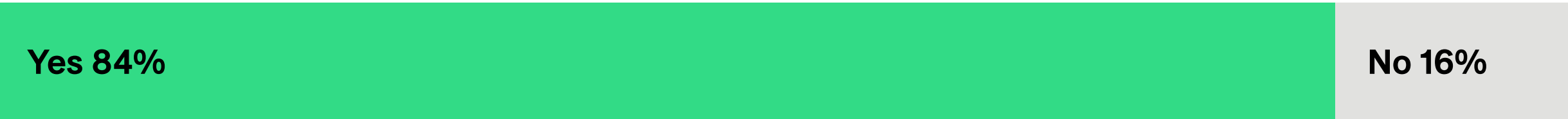
Practices

Data collaboration between companies continues a rapid ascent, marking its entry into mainstream practice

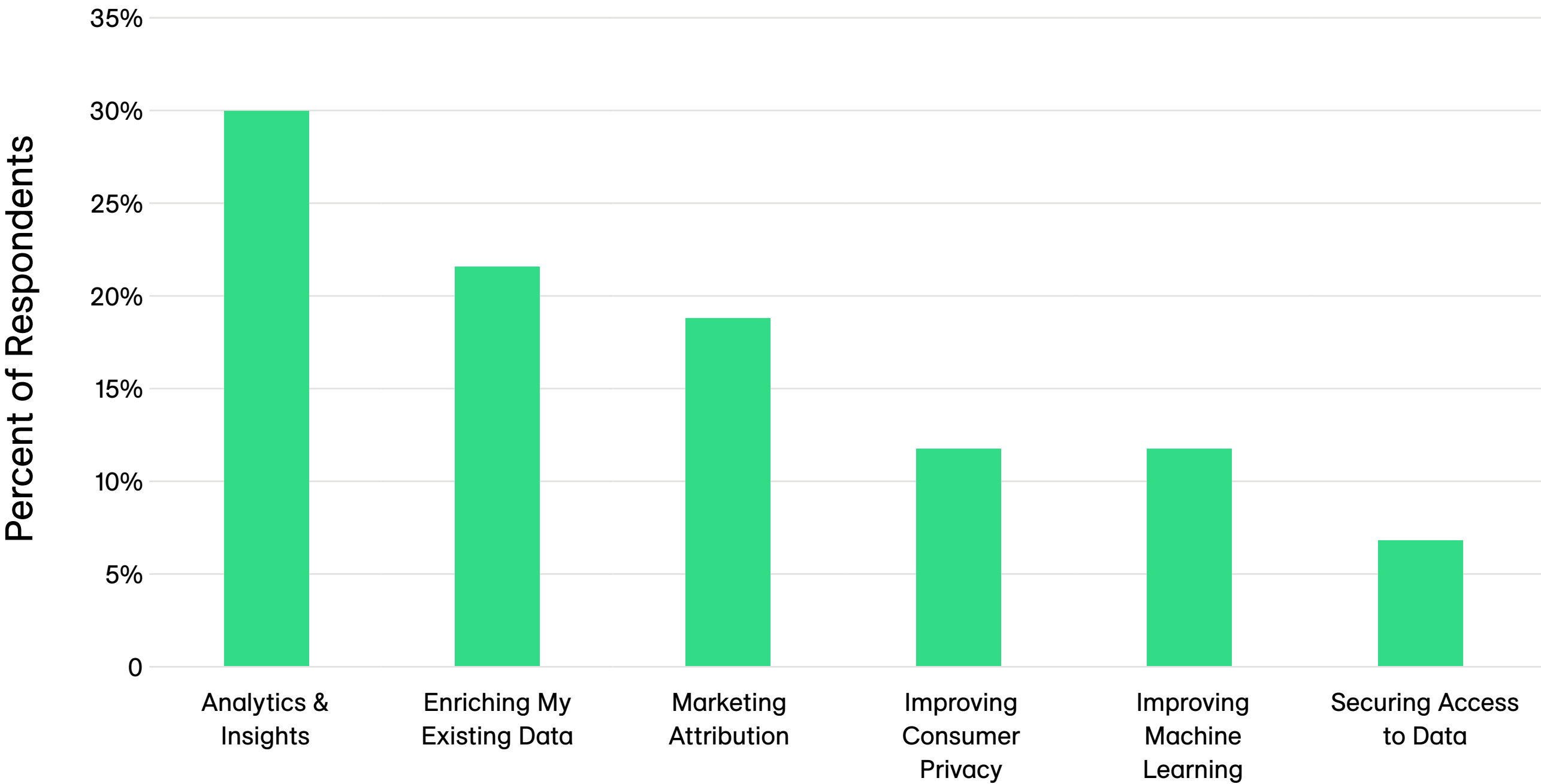
An overwhelming 84% of companies — and 73% in regulated industries — reported engaging in data collaboration during the last 12 months, a leap of 23% from last year’s number. As data collaboration becomes ubiquitous, it is still dominated by industries leveraging adtech to power leading use cases, including analytics and insights, enriching existing data sets, and marketing attribution.

But we’re also seeing new and interesting data collaboration use cases in other sectors, particularly in regulated industries. Companies now leverage data collaboration to deliver secure access to data, enhance customer privacy, and improve machine learning models.

Has your business collaborated with any other businesses to share data or insights over the past 12 months?



What do you see as the primary use cases for data collaboration today?



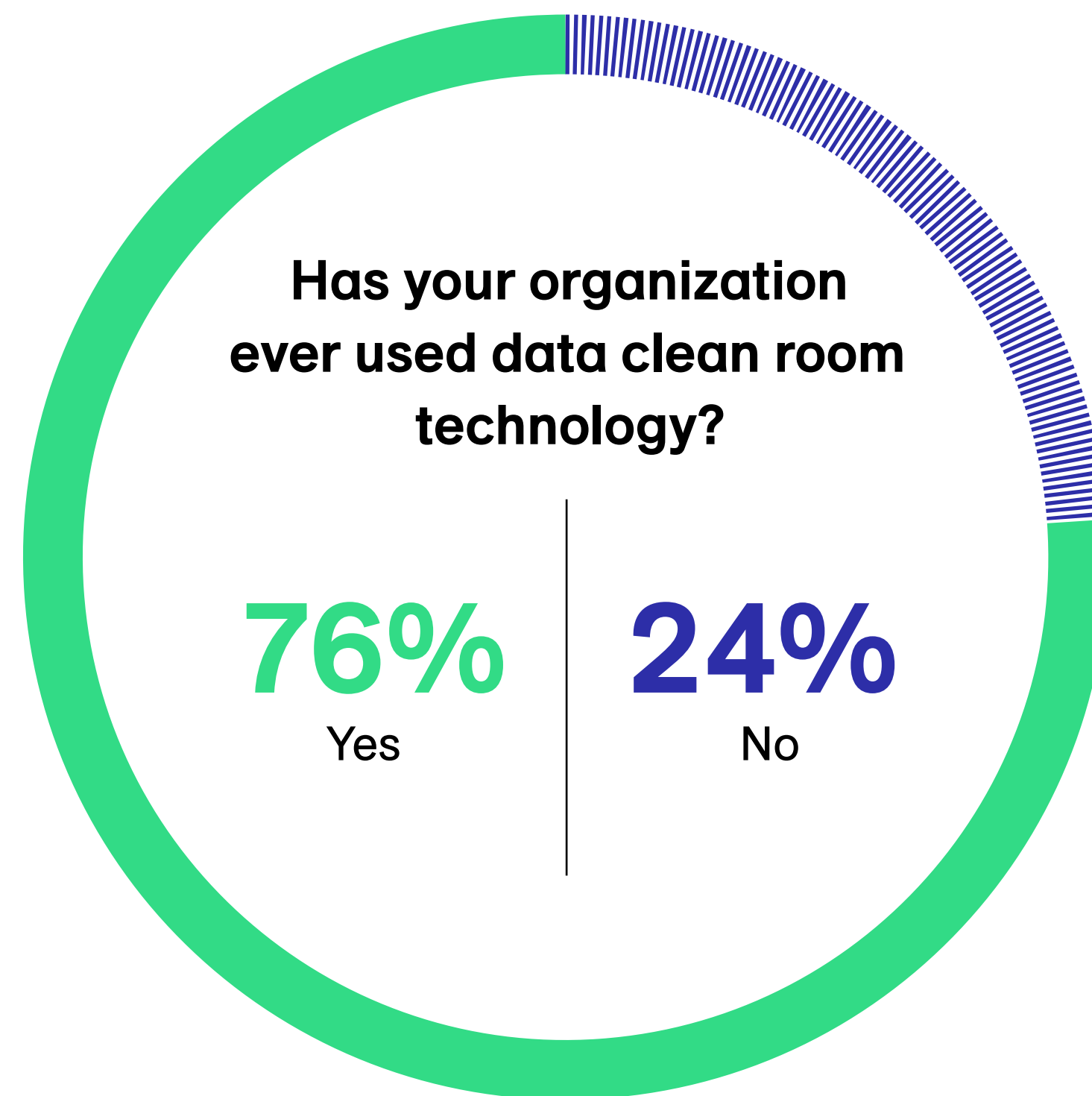


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[Data collaboration via data clean rooms] is something we know we need to do and learn and build out — [it] is going to come to bear more and more on our business.

Mark Heitke / Director, Ad Products & Audience Strategy / Best Buy



Three-quarters of all companies reported adopting clean rooms — a 60% surge in 12 months.

Whereas slightly less than half of respondents reported using data clean room technology last year, we now see clean rooms employed by 76% of all firms, notably including 59% of companies facing stiffer data security requirements in regulated industries. The fact that most organizations used two or more clean room providers — from walled gardens to private clean rooms to dedicated clean room vendors — further underlines the broad adoption of data clean room use cases.

In mapping clean room adoption, we see that for many companies, first exposure typically comes via the orchestration of a single walled garden. With that introduction, business and technical teams soon begin to envision a more holistic ecosystem of data partners and use cases. To accelerate that vision and avoid additional technical burdens, organizations turn to the efficiency, interoperability, and governance capabilities of a modern data clean room.



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Clean rooms are a great way to create an environment that is trusted and safe and ultimately can provide the right personalization and consumer outcomes while also driving business and market outcomes.

Christine Maguire / GM/VP, Global Media Business / Tripadvisor

Opportunities

Data collaboration, and the data-driven insights it enables, remain vital strategic objectives

With 82% of respondents planning to collaborate with data partners in the next 12 months, there appears to be little doubt among businesses across industries of the value of collaboratively analyzing data to drive insight and innovation.

Bolstering this conclusion is the fact that 99% of respondents plan to continue or increase their data collaboration activities in the coming year. With modern data clean rooms enabling secure, privacy-centric, multicloud data collaboration, companies recognize the value and competitive necessity of pursuing data-driven insights about their customers, products, markets, and supply chains.

Where do you see your level of data collaboration with other organizations over the next 12 months compared to your current state?

↑ **58%**
Increasing

⊖ **41%**
Staying the Same

↓ **1%**
Decreasing



As consumer profiles change, it stresses the importance to bring in new and novel signals in different types of ways. Leaning into clean room technology is that collaboration layer that allows us to extract meaningful insights.


Zach Lain / Director, Global Data Partnerships / PepsiCo


Access to data tops the list of obstacles to expanded data collaboration, and modern data clean rooms offer a solution


Companies face a variety of technical and organizational challenges in ramping up data collaboration initiatives. Besides access to data, teams must contend with legal, privacy, and technology concerns, as well as the varying readiness of their partners.


While these multiple challenges are often overlapping, their solution is fortunately singular. Modern data clean rooms empower teams with full interoperability (across cloud platforms, identity solutions, and more), industry-leading data security and privacy controls, and advanced orchestration — all of which eliminate the problems of data access, technology compatibility, and data privacy while dramatically simplifying the experience for data partners.

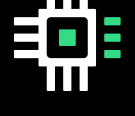
How would you rank the following, from highest to lowest, in terms of the biggest blockers to data collaboration?

 **Access to Data**

 **Legal**

 **Privacy**

 **Readiness of Partners**

 **Technology**



Roku

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The data clean room comes in very handy to help us actually broaden the ways we use the data... to do all of the nice things that we want to do with our advertisers, agencies, and publisher partners.

Youssef Ben-Youssef / Head of Ad Platform / Roku



Machine Learning (ML) and AI emerge as both robust use cases and game-changing enablers of data collaboration via data clean rooms

Perhaps the highlight of this year’s survey is the degree to which AI and ML have become omnipresent. First, companies see data clean rooms as essential to provide new sources of data and share models for AI and ML use cases, particularly for industries that require higher levels of security and privacy. Virtually unmentioned last year, this year 12% of respondents reported using collaborative data science to improve AI/ML workflows as their primary use case.

Second, generative AI is set to transform the data collaboration efforts of business teams. Since almost two-thirds of data collaboration operations are driven by these teams, the potential for gen AI to streamline and accelerate data collaboration via data clean rooms for non-technical users is likely to be profound.

Generative AI is set to transform the data collaboration efforts of business teams



Clean rooms are, from my perspective,
the future.

Ajay Kapoor / Global Director, Performance-Driven Marketing / General Motors



Conclusion

The data collaboration ecosystem diversifies and enters a new era with AI

From its advertising roots, data collaboration has dramatically expanded this year, demonstrating the broad range of use cases it benefits. Across industries, business and data science teams leveraged data collaboration via data clean rooms to access new data sets, unlock new insights, and power unprecedented innovation. Companies also looked ahead, using shared data and clean rooms to take on advanced workflows such as ML model training and confidential computing.

Data collaboration is now a keystone of any data strategy, and modern data clean rooms — by delivering broad interoperability and seamless orchestration across clouds, as well as the highest levels of security, privacy, and efficiency — now present the simplest and fastest on-ramp to a future of data collaboration-derived insight.

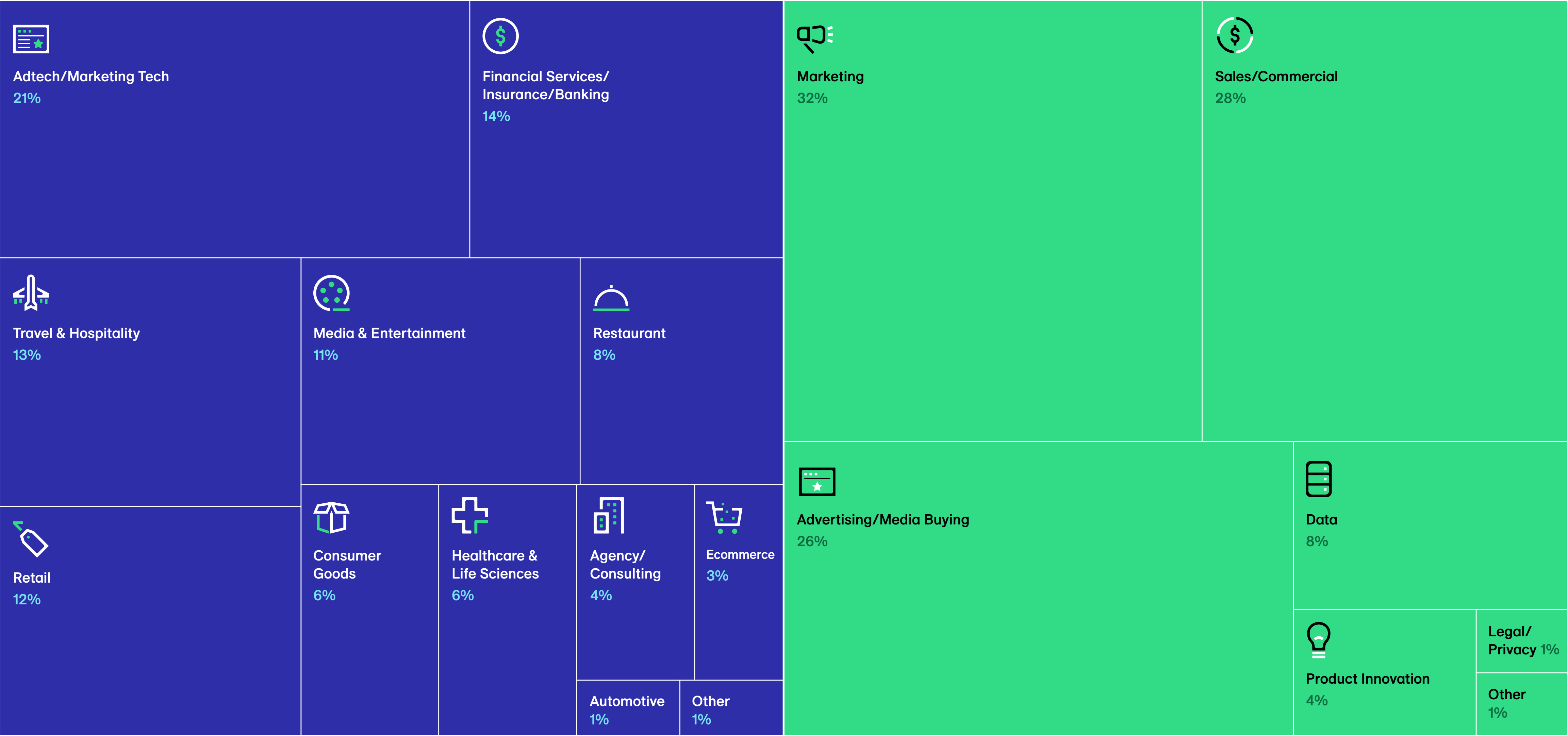
Three reasons data collaboration is now essential:

- 1** Intelligence: Leverage data-driven insights based on access to new and differentiated data from key partners to drive your growth strategy.
- 2** Enablement: Enable — and automate — a rapidly growing set of diverse use cases that spans industries and levels of data maturity.
- 3** Future-proofing: Engage with advanced workloads — machine learning models, proprietary code, and confidential computing.

Survey Methodology and Participants

Industries

Roles



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