Research

From ExchangeWire

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THE STATE OF DATA AND TECH MATURITY FOR BRANDS

Mat Broughton
Research Lead, ExchangeWire

Vincent Niou
Founder, Skeleton Key

Tingyan Han
Data Strategy Lead, Skeleton Key

ExchangeWire

SKELETON KEY

www.exchangewire.com | research@exchangewire.com

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FOREWORD

The global data and technology landscape in advertising has reached an inflection point. After years of relative stability, we are witnessing unprecedented fragmentation driven by three key forces: evolving privacy regulations, technological disruption, and changing consumer behaviour. Privacy regulations are developing at varying speeds across markets, while major technology platforms continue to introduce stricter data collection and tracking restrictions. Traditional digital advertising identifiers — from third-party cookies to mobile device IDs — are becoming increasingly obsolete, spurring the emergence of privacy-centric alternatives. Meanwhile, media consumption grows increasingly complex as consumers spread their attention across an expanding array of channels, platforms, and services.

These shifts create unique challenges and opportunities in Asia-Pacific (APAC), arguably the industry's most diverse and dynamic region. Beyond regulatory and technological fragmentation, APAC's complexity stems from its rich mix of organisational scales and structures — from single-market operators to regional heavyweights and global enterprises. This diversity manifests in surprising ways: our research reveals that larger organisations often struggle more with data and technology maturity than their nimbler counterparts, while regional brands frequently outperform both local and global operators.

To better understand these dynamics, ExchangeWire, in collaboration with Skeleton Key, conducted a comprehensive examination of brand maturity across four major APAC markets: Singapore, Indonesia, Philippines, and Australia. Our investigation focused on four critical capability areas:

- Data and Technology Strategy
- Data Foundation
- Audience Strategy
- Measurement, Reporting, and Optimisation

The findings paint a nuanced picture of APAC's data and technology landscape. We discover that maturity does not follow a single path — regional variations, organisational structures, and strategic priorities all play crucial roles in capability development. While some brands excel through local market focus, others find strength in regional coordination or global resource access. Most notably, we find that organisational alignment can sometimes matter more than size or resources in achieving digital maturity.

This report offers a detailed analysis of these patterns, examining how different types of organisations navigate common challenges — from privacy concerns and implementation costs to technological gaps and organisational silos. Through this lens, we provide actionable insights for brands seeking to advance their capabilities while maintaining the agility needed in today's rapidly evolving digital ecosystem.

> **"THIS STUDY ILLUMINATES APAC BRANDS' EVOLVING MATURITY IN MANAGING AND DEPLOYING DATA AND TECHNOLOGY. BY EXAMINING CURRENT LEVELS AND UNCOVERING KEY BARRIERS ACROSS MARKETS, IT PROVIDES ACTIONABLE PATHWAYS FOR BRANDS TO DEVELOP AND ADVANCE ALIGNED, PRIVACY-FIRST CAPABILITIES THAT DRIVE POSITIVE OUTCOMES AND SCALE EFFECTIVELY IN AN INCREASINGLY COMPLEX DIGITAL LANDSCAPE."**
>
> VINCENT NIOU — FOUNDER, SKELETON KEY

METHODOLOGY

This report is based on original quantitative research conducted through an online survey of 200 brand professionals across the Asia-Pacific region. To ensure balanced representation, we surveyed four key markets — Singapore, Indonesia, Philippines, and Australia — with 50 respondents from each market. Data collection occurred over a two-week period from 17th September to 23rd September 2024.

SURVEY CATEGORIES AND MATURITY SCORING

We assessed organisations' maturity across four key data and technology categories, each containing specific subcategories:

DATA AND TECHNOLOGY STRATEGY			DATA FOUNDATION		AUDIENCE STRATEGY		MEASUREMENT, REPORTING, AND OPTIMISATION		
Organisation Structure and Culture	Data Strategy and Resilience	Technology Stack and ROI	Data Capture and Quality	Identity Resolution	Insights and Segmentation	Data Activation and Customer Journeys	Measurement Methods	Dashboarding and Reporting	Campaign Optimisation

Respondents received scores based on their alignment with maturity statements most applicable to their business for each subcategory. The scoring framework ranges from 1 to 4, corresponding to the following maturity levels:

MATURITY LEVEL	SCORE	DESCRIPTION
Reactive	1	Early-stage capabilities with limited processes in place.
Emerging	2	Developing processes but lacking consistency or scalability
Mature	3	Well-established processes integrated across functions
Advanced	4	Fully optimised capabilities with high automation, aligned with strategic goals

These subcategory scores were used to calculate both category and overall maturity scores for each respondent. For detailed criteria defining each maturity level across subcategories, please refer to Appendix I.

BARRIERS TO MATURITY

Beyond evaluating maturity levels, we asked respondents to identify key barriers preventing their brand from reaching desired maturity levels within each category. These barriers were grouped into three categories:

ORGANISATIONAL/STRUCTURAL

Challenges related to directives being managed outside of the APAC region or marketing departments, recruitment and training limitations, and internal resistance to implementing new solutions.

DATA/SOLUTIONS

Challenges such as privacy concerns, lack of first-party data, cost of implementing new solutions, and insufficient measurement or reporting capabilities.

THIRD-PARTY

Lack of support from agency and/or technology partners, or unavailability of desired solutions from existing partners.

This barrier analysis provided critical insights into the challenges brands face, highlighting actionable areas for advancement.

DATA SEGMENTATION AND ANALYSIS

To uncover deeper insights and account for APAC's nuanced diversity, we segmented and analysed data across four key dimensions:

1. MARKET

Defined by the respondent's primary country of operation (Singapore, Indonesia, Philippines, or Australia).

2. COMPANY SIZE

Defined by the organisation's annual marketing budget, categorised as large (>USD$100M), medium (USD$10M-USD$100M), or small (<USD$10M)*. Note that this represents a brand's overall annual marketing budget, not just the portion managed by the respondent.

3. BRAND COVERAGE

Defined by the brand's geographic footprint, categorised as single-market, regional, or global. This reflects brands' operational scale and scope, which influences resource availability, organisational complexity, and strategy implementation.

4. DIRECTIVE LEVEL

Defined by the organisational level from which data and technology directives are issued, categorised as local, regional, or global. This highlights the decision-making structure and where strategic authority resides, which impacts agility, alignment and localisation of strategies.

*We also analysed a subset of Small brands with marketing budget <USD$5M. This subset is categorised as Micro and is referenced in the report as needed.

EXECUTIVE SUMMARY

NAVIGATING COMPLEXITY IN APAC'S DATA AND TECHNOLOGY LANDSCAPE

Brands across APAC report a moderate average maturity score of 2.56 out of 4 in data and technology capabilities. This reflects meaningful progress beyond basic operations but highlights persistent barriers—such as organisational silos, high implementation costs, and data privacy concerns—that limit advancement to more sophisticated capabilities. Significant opportunities lie in foundational areas like data quality, measurement frameworks, and first-party data strategies, which are essential for unlocking efficiency and scaling advanced capabilities.

KEY FINDINGS

This study highlights key trends, opportunities and challenges across APAC markets, with maturity scores varying widely based on market, organisational structure, and strategic focus. Notable findings include:

- **Diverse paths to maturity reflect regional complexity**
  While the average overall maturity is 2.56, organisations show marked differences in their development paths. Regional brands achieve the highest maturity (2.77) by balancing standardised processes with local market needs. Global brands demonstrate remarkable consistency across capabilities (2.54-2.57) but often struggle with local implementation. Single-market brands show the greatest variance — excelling in audience strategy (2.69) while lagging significantly in measurement (1.88). This diversity reflects APAC's complex digital ecosystem and suggests no single approach guarantees successful capability advancement.
- **Strength in audience insights and campaign optimisation**
  Brands show particular strength in insight generation (53% mature/advanced) and campaign optimisation (57% mature/advanced). These organisations have progressed beyond basic analysis to employ sophisticated approaches, combining user-level data with top-down sources and leveraging real-time signals for value-based optimisation.
- **Data foundation gaps limit advanced capabilities**
  Nearly one-third of brands are reactive in data capture and quality, operating with minimal visibility into how data impacts marketing. Without strong data foundations, brands face significant barriers in progressing beyond emerging capabilities in personalisation, measurement, and activation.
- **Measurement lags behind other capabilities**
  Measurement is the weakest capability, with the lowest average score (2.46) among subcategories and 54% of respondents at reactive/emerging maturity levels. This highlights a significant growth opportunity, as many organisations still rely on basic metrics and inconsistent KPIs instead of adopting advanced attribution models and incrementality-based measurement frameworks.
- **Large brands struggle with data management**
  Large brands (>USD$100M marketing budgets) paradoxically report the lowest overall maturity (2.47). They are particularly weak in data foundation (2.22), reflecting challenges in unifying data across complex brand activities and fragmented customer touchpoints.
- **Local brands excel in alignment and execution**
  Single-market brands demonstrate higher maturity in organisation structure and culture (3.00), technology stack and ROI (2.88), and insights and segmentation (3.00). These strengths are mirrored in brands following local directives, suggesting reduced organisational complexity enhances alignment and performance.

- **Directive levels limit and enhance different capabilities**
  Brands with local directives excel in areas that require market-specific execution and flexibility, such as audience strategy (2.88), organisational structure (2.88), and tech stack (2.75). Conversely, global directives deliver stronger maturity in capabilities that benefit from centralised resources and oversight, such as data strategy (2.60), data collection (2.54), measurement (2.53) and campaign optimisation (2.79).

BARRIERS TO ADVANCING MATURITY

Despite progress, brands face significant challenges in advancing to higher maturity levels. These barriers vary by brand size, market footprint, and directive level.

- **Organisational silos hinder alignment and agility**
  36% of brands report challenges related to data and technology directives being managed outside the marketing department. This issue particularly affects larger organisations (46%), where greater complexity and fragmented structures exacerbate misalignment between teams.
- **Data privacy concerns outweigh first-party data volume issues**
  While only 18% of brands cite first-party data volume as a significant barrier, concerns over consumer data privacy are much more prevalent (32%). Privacy challenges are particularly pronounced in the Philippines (38%).
- **High costs and limited tech partner support**
  Cost barriers remain a critical challenge for many brands, particularly in areas like measurement and optimisation (34%) and audience strategy (32%). Additionally, 35% of respondents feel they lack adequate support from technology partners, especially when it comes to building and advancing their data and technology strategies. These dual challenges inhibit brands from experimenting with or implementing new solutions effectively.
- **Small brands perceive the fewest barriers**
  Small brands (<USD$10M marketing budget) report fewer barriers to maturity compared to larger organisations. They are the least encumbered by issues like lack of first-party data (12%) and internal resistance (20%). Their simpler organisational structures also reduce complexity, making structural barriers less prevalent.
- **Micro and local brands uniquely report no barriers**
  Micro brands (<USD$5M marketing budget), single-market brands, and those following locally-issued directives share the advantage of agility. These groups operate primarily at the local level, and a notable proportion of respondents (10–16%) report no significant barriers to achieving maturity, suggesting that reduced organisational complexity and localised decision-making can help mitigate many challenges faced by larger organisations.

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ORGANISATIONAL SILOS, IMPLEMENTATION COSTS, AND DATA PRIVACY CONCERNS ARE THE MOST PREVALENT BARRIERS FOR BRANDS

MARKET-LEVEL INSIGHTS

Maturity levels vary significantly across the surveyed APAC markets, reflecting market differences in organisational priorities, resource allocation, and data and technology landscapes. Each market exhibits different strengths and challenges, offering opportunities for targeted improvement.

SINGAPORE
REGIONAL HUB ADVANTAGE DRIVES MATURITY

Singapore leads surveyed markets with the highest overall maturity (2.65), benefiting significantly from its position as a regional hub — 90% of respondents operate in regional or global roles. The market shows particular strength in data capture capabilities (2.71), though it faces ongoing challenges in identity resolution (2.49). Notably, Singapore reports significantly fewer barriers than other markets in key areas, especially around talent acquisition (10%) and staff training (16%), suggesting a more mature digital talent ecosystem.

AUSTRALIA
STRONG STRATEGY, CHALLENGING IMPLEMENTATION

Australia demonstrates moderate overall maturity (2.56) with notable strengths in specific capabilities. The market excels in audience strategy (2.65) and shows sophisticated data strategy resilience (2.96), indicating strong strategic planning capabilities. However, these advances are tempered by weaknesses in organisation structure (2.33) and tech stack implementation (2.35). Australian brands face significant challenges around privacy concerns (46%) and internal resistance (40%), while particularly struggling with measurement methods (2.35).

PHILIPPINES
STRONGER FOUNDATIONS, WEAKER EXECUTION

The Philippines maintains competitive overall maturity (2.55) driven by decent data and technology strategy capabilities (2.69). While the market matches regional standards in data foundation (2.58), it shows notable weakness in measurement and optimisation (2.43). Philippine brands report the highest frequency of barriers among surveyed markets (29% average), with particular challenges around privacy regulations and organisational alignment. This suggests that while strategic understanding exists, execution remains challenging.

INDONESIA
EMERGING CAPABILITIES, FOCUSED PROGRESS

Indonesia reports the lowest overall maturity (2.46) but reveals some unexpected strengths. The market particularly struggles with data strategy (1.96), indicating predominantly reactive approaches. However, Indonesia shows surprising relative maturity in measurement (2.58), suggesting focused investment in this area. While reporting the fewest barriers overall (20% average), implementation costs remain a significant challenge for Indonesian brands advancing their capabilities.

STRATEGIC OPPORTUNITIES

Brands seeking to advance their capabilities should prioritise:

STRENGTHENING MEASUREMENT

Progress from last-click and vanity metrics to a measurement framework underpinned by incrementality and business outcomes

IMPROVING DATA FOUNDATIONS

Develop more robust tools, policies, and processes to collect, manage, and activate high-quality data for optimisation, personalisation, and measurement

BRIDGING ORGANISATIONAL SILOS

Improve alignment between global, regional and local priorities as well as company departments for greater innovation and implementation agility

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SUCCESS REQUIRES BALANCED INVESTMENT ACROSS TECHNOLOGY, PROCESSES, AND PEOPLE, WHILE MAINTAINING FLEXIBILITY TO ADAPT STRATEGIES FOR MARKET-SPECIFIC CONDITIONS

SECTION 1:

OVERALL RESULTS

OVERALL AND CATEGORY

Brands in the surveyed markets reported moderate maturity with an average score of 2.56 out of 4. The low standard deviation (±0.37) suggests fairly consistent maturity levels across organisations. Brand maturity across the four main categories also shows remarkable consistency:

	OVERALL DATA AND TECHNOLOGY MATURITY	DATA AND TECHNOLOGY STRATEGY	DATA FOUNDATION	AUDIENCE STRATEGY	MEASUREMENT, REPORTING, AND OPTIMISATION
MEAN MATURITY RATING	2.56	2.57	2.55	2.56	2.56
± STANDARD DEVIATION	± 0.37	± 0.72	± 1.12	± 0.79	± 0.74

Similarly, brand distribution is consistent across maturity stages. Each category shows similar proportions of mature/advanced levels: data strategy and technology stack (54%), data foundation (52%), audience strategy (55%), and measurement, reporting, and optimisation (53%). Approximately one-fifth of brands remain at reactive stages across all categories (19–25%).

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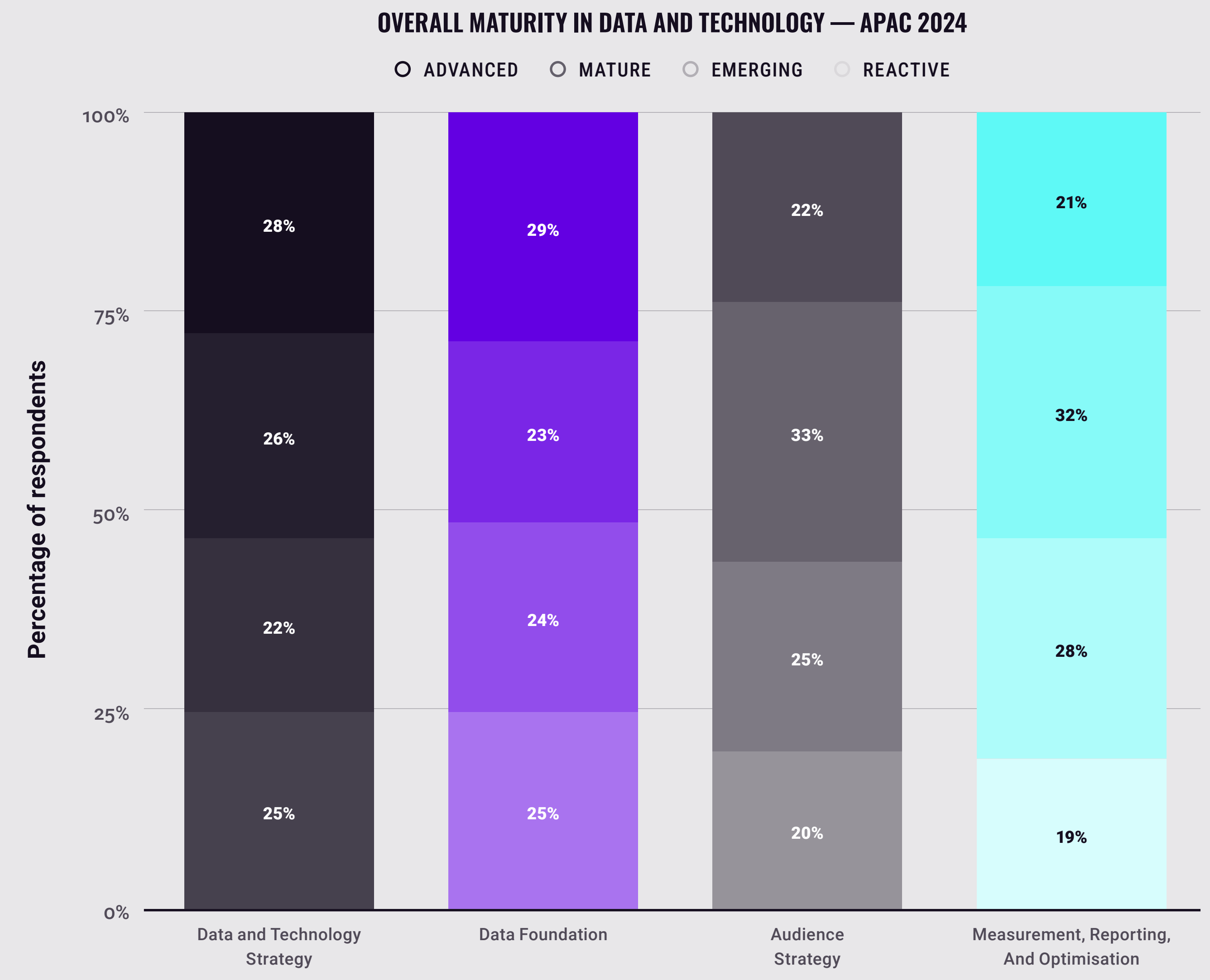
DESPITE FAIRLY SIMILAR MATURITY SCORES, BRANDS IN APAC TAKE DISTINCTLY DIFFERENT PATHS TO DATA AND TECHNOLOGY MATURITY



However, these similar distributions mask distinctly different approaches. Within each category, no single capability is a strong driver of overall data and technology maturity. Brands exhibit the most notable differences in the following capabilities:

- **Identity Resolution (±1.19):** Ranging from ad hoc data collection to sophisticated unified customer views using privacy-protected IDs and data clean rooms
- **Organisation Structure and Culture (±1.18):** Varying from siloed operations with minimal data expertise to seamless cross-functional collaboration with dedicated specialists
- **Measurement Methods (±1.15):** Spanning from basic front-end metrics to statistically-proven frameworks combining attribution, incrementality, and marketing mix modeling

* See Appendix III for consolidated subcategory maturity scoring

These variations, combined with the correlation analysis*, highlight how brands develop capabilities at different rates based on their unique circumstances and priorities, even while maintaining similar overall maturity levels. The correlation data reinforces this finding — no single category demonstrates a strong relationship with overall maturity (correlations ranging from 0.35 to 0.53), and the weak and sometimes negative correlations between individual categories (ranging from -0.38 to 0.27) indicate that advancement in one capability does not necessarily correspond with progress in others. This demonstrates how organisations in our surveyed markets achieve similar overall maturity levels through different combinations of capability advancement.

	DATA AND TECHNOLOGY STRATEGY	DATA FOUNDATION	AUDIENCE STRATEGY	MEASUREMENT, REPORTING, AND OPTIMISATION	OVERALL DATA AND TECHNOLOGY MATURITY
DATA AND TECHNOLOGY STRATEGY	1.00	-0.38	0.27	-0.06	0.35
DATA FOUNDATION	-0.38	1.00	-0.18	0.26	0.50
AUDIENCE STRATEGY	0.27	-0.18	1.00	-0.21	0.44
MEASUREMENT, REPORTING, AND OPTIMISATION	-0.06	0.26	-0.21	1.00	0.53
OVERALL DATA AND TECHNOLOGY MATURITY	0.35	0.50	0.44	0.53	1.00

Correlation: -1, -0.5, 0, 0.5, 1

* See Appendix III for correlation analysis at the subcategory level

BY MARKET

Singapore leads surveyed markets with the highest average maturity of 2.65 and top scores across all categories except audience strategy. This performance reflects Singapore's capabilities as a regional hub — 90% of respondents operate in regional or global roles, enabling more sophisticated cross-functional processes and data strategies.

Australia (2.56) shows balanced progression from emerging to mature capabilities across categories. However, their advancement is uneven - while many Australian brands demonstrate mature audience strategy capabilities (2.65) with sophisticated segmentation and activation approaches, they often remain at emerging stages in technology implementation and data governance.

The Philippines (2.55) faces its greatest challenges in measurement and optimisation (2.43), with many brands still relying on basic metrics and manual reporting processes. The market also reports the highest frequency of barriers (29% average across all barriers), particularly around data privacy concerns and organisational challenges.

Indonesia reports the lowest overall maturity (2.46), largely due to reactive approaches in data and technology strategy (1.96). Many Indonesian brands remain at early maturity stages, with limited data expertise and ad hoc technology deployments. While they report the lowest likelihood of barriers (20% average) among surveyed countries, implementation costs frequently prevent advancement to more sophisticated capabilities.

CATEGORY	AUSTRALIA	INDONESIA	SINGAPORE	PHILIPPINES
OVERALL DATA AND TECHNOLOGY MATURITY	**2.56**	**2.46**	**2.65**	**2.55**
DATA AND TECHNOLOGY STRATEGY	2.54	2.33	2.71	2.69
DATA FOUNDATION	2.49	2.51	2.60	2.58
AUDIENCE STRATEGY	2.65	2.43	2.62	2.52
MEASUREMENT, REPORTING AND OPTIMISATION	2.54	2.58	2.67	2.43

90%

of respondents operate in regional or global roles

29%

The Philippines reports the highest frequency of barriers

20%

Indonesia reports the lowest likelihood of barriers

BY COMPANY SIZE

Large brands (>USD$100M marketing budget) surprisingly report the lowest overall maturity (2.48). Despite greater resources, these organisations often struggle with greater data fragmented due to more customer touchpoints and marketing activities, making it harder to manage, unify, and govern their customer data. This challenge manifests in their notably low data foundation score (2.22).

Medium brands (USD$10M-$100M) achieve the highest overall maturity (2.59), showing more mature capabilities across categories, particularly in data foundation (2.67) where they demonstrate more structured approaches to data capture and identity resolution.

Small brands (<USD$10M) outperform large brands, particularly in measurement, reporting and optimisation (2.62), where they show greater agility in implementing and testing new solutions. They also report fewer barriers to maturity — only 19% cite significant barriers compared to 25% for medium brands and 19% for large brands. Small brands are least likely to face first-party data limitations (12%) or internal resistance (20%). Unsurprisingly, they are also least susceptible to barriers related to organisational structure.

Notably, micro brands (subset of small brands with <USD$5M) stand alone in reporting zero barriers to maturity in meaningful numbers. This may reflect different maturity goals than larger organizations. This pattern also appears with single-market brands and those following local directives, likely due to brand overlap.

CATEGORY	LARGE (>USD$100M)	MEDIUM (USD$10M-USD$100M)	SMALL (<USD$10M)
OVERALL DATA AND TECHNOLOGY MATURITY	**2.48**	**2.59**	**2.53**
DATA AND TECHNOLOGY STRATEGY	2.57	2.57	2.57
DATA FOUNDATION	2.22	2.67	2.45
AUDIENCE STRATEGY	2.65	2.55	2.47
MEASUREMENT, REPORTING AND OPTIMISATION	2.48	2.56	2.62

BY BRAND COVERAGE

Global brands show remarkable consistency, scoring between 2.54 and 2.57 across all four categories. This narrow range contrasts sharply with regional and single-market brands, suggesting larger operational footprints drive more uniform capability development.

Regional brands achieve the highest overall maturity (2.77) and lead in each category compared to global and single-market brands. This suggests organisations at the regional level strike an effective balance between organisational alignment, resources, and operational complexity.

Single-market brands show the lowest overall maturity (2.40). While they demonstrate mature audience strategy capabilities (2.69) with advanced segmentation and insight generation, they often remain at reactive or emerging stages in measurement, reporting, and optimisation (1.88). This suggests that many still rely on basic metrics and manual reporting processes rather than more sophisticated approaches.

CATEGORY	GLOBAL	REGIONAL	SINGLE-MARKET
OVERALL DATA AND TECHNOLOGY MATURITY	**2.54**	**2.77**	**2.40**
DATA AND TECHNOLOGY STRATEGY	2.55	2.68	2.58
DATA FOUNDATION	2.52	2.84	2.44
AUDIENCE STRATEGY	2.54	2.63	2.69
MEASUREMENT, REPORTING AND OPTIMISATION	2.55	2.91	1.88

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MANY SINGLE-MARKET BRANDS STILL RELY ON BASIC METRICS AND MANUAL REPORTING PROCESSES

BY DIRECTIVE LEVEL

Brands with locally-issued directives report the highest overall maturity (2.61), driven by significantly stronger audience strategy performance (2.88). Organisations receiving regional (2.53) or global (2.57) directives show lower overall maturity, highlighting the advantages of local autonomy.

Organisations receiving regional (2.53) or global (2.57) directives show lower overall maturity, despite often having more sophisticated technology stacks. This suggests that while centralised directives may enable more advanced technical capabilities, they can impede the agility needed to progress from emerging to mature stages across other capabilities.

This pattern reinforces findings from the brand coverage analysis — organisations seem to perform better when they can adapt strategies to local market conditions while maintaining access to sufficient resources and expertise.

CATEGORY	GLOBAL	REGIONAL	LOCAL
OVERALL DATA AND TECHNOLOGY MATURITY	**2.57**	**2.53**	**2.61**
DATA AND TECHNOLOGY STRATEGY	2.60	2.54	2.56
DATA FOUNDATION	2.54	2.56	2.53
AUDIENCE STRATEGY	2.54	2.52	2.88
MEASUREMENT, REPORTING AND OPTIMISATION	2.62	2.52	2.46

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ORGANISATIONS SEEM TO PERFORM BETTER WHEN THEY CAN ADAPT STRATEGIES TO LOCAL MARKET CONDITIONS

SECTION 2:

DATA AND TECHNOLOGY STRATEGY

APAC brands demonstrate moderate maturity in data and technology strategy (2.57), with organisation structure and culture leading (2.62), followed by data strategy and resilience (2.57) and technology stack and ROI (2.52).

DATA AND TECHNOLOGY STRATEGY — MATURITY

	OVERALL	ORGANISATION STRUCTURE AND CULTURE	DATA STRATEGY AND RESILIENCE	TECHNOLOGY STACK AND ROI
MEAN MATURITY RATING	2.57	2.62	2.57	2.52
± STANDARD DEVIATION	± 0.72	± 1.18	± 1.13	± 1.10

Organisation structure and culture shows solid maturity progression:

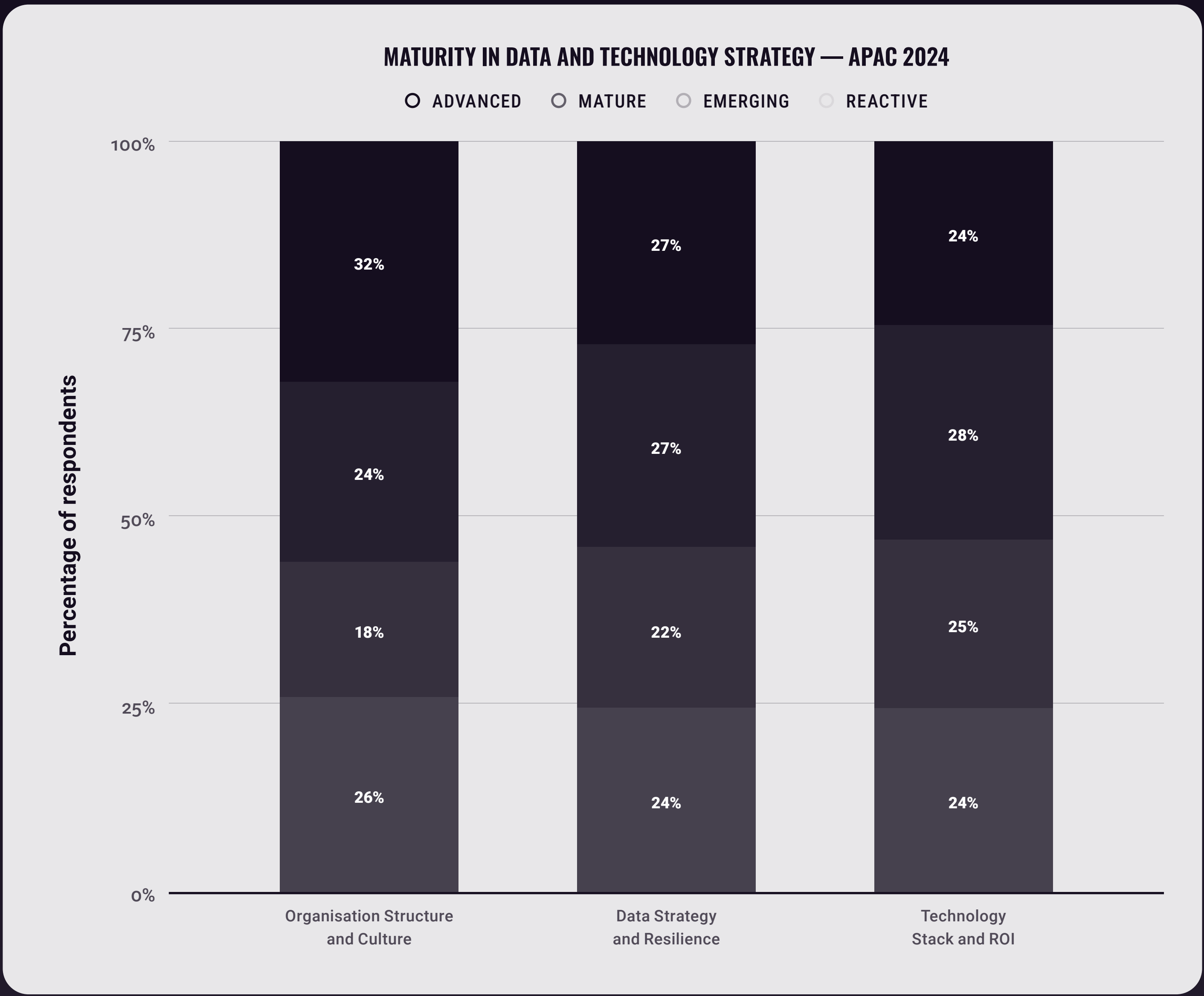
- 32% demonstrate advanced capabilities, displaying seamless collaboration and deeply ingrained data-driven culture with regular expert training
- 24% operate at mature levels, maintaining structured communication and dedicated data teams supporting marketing
- The remaining 44% function at emerging or reactive stages with siloed departments, minimal data expertise, or informal communication patterns

Data strategy and resilience demonstrates balanced maturity distribution:

- 27% achieve advanced status with clearly defined, organisation-wide data strategies and proactive approaches to experimentation
- 27% demonstrate mature capabilities, developing practical marketing use cases though often siloed within business units
- The remaining 46% operate with either no structured data strategy or only general plans lacking practical implementation

Technology stack and ROI presents mixed advancement:

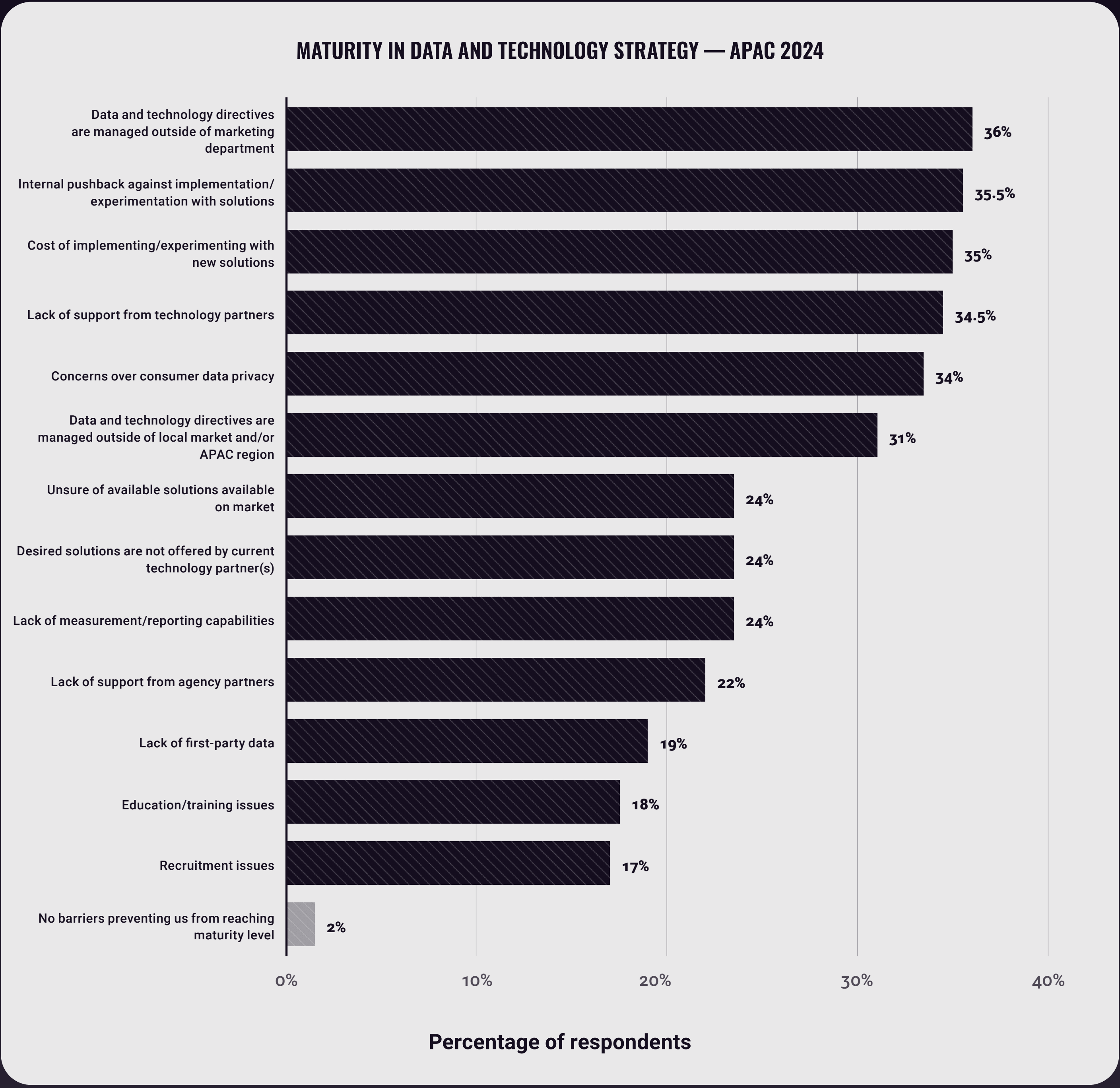
- 24% maintain advanced capabilities with fully connected tech stacks enabling scalable use cases
- 28% show mature capabilities, employing formal frameworks to measure martech investment returns
- The remaining 49% struggle with ad hoc technology deployments or face significant gaps in their tech architecture



The category faces several significant barriers to maturity advancement:

- **Organisational structure (36%):** Directives managed outside marketing impede progression from siloed operations to cross-functional collaboration
- **Internal resistance (35.5%):** Limits the shift from minimal experimentation to a culture of active innovation
- **Implementation costs (35%):** Restricts investment in tools, tech and solutioning
- **Technology partner support (34.5%):** Hampers development of effective martech architectures
- **Data privacy concerns (34%):** Complicates data strategy implementation

These barriers particularly affect organisations attempting to move beyond informal processes to establish structured, scalable approaches.



BY MARKET

Singapore leads with the highest category maturity (2.71), followed by the Philippines (2.69), Australia (2.54), and Indonesia (2.33). Singapore demonstrates advanced capabilities with regular cross-functional collaboration and structured data strategies, while facing fewer barriers in talent (10%), training (16%), and measurement (18%).

Indonesia's significantly lower score stems from low maturity in data strategy and resilience (1.96), indicating predominantly reactive approaches with minimal futureproofing. Their primary barriers include insufficient tech partner support and implementation costs (38% each).

Australia excels in data strategy and resilience (2.96), showing proactive innovation and well-defined customer data tactics. However, lower scores in organisation structure (2.33) and tech stack (2.35) reveal persistent silos and gaps in martech architecture. Privacy concerns (46%) and internal resistance (40%) pose significant challenges.

The Philippines achieves mature capabilities despite reporting the highest frequency of barriers, particularly around tech partner support and measurement capabilities (40% each).

CATEGORY	SUBCATEGORY	AUSTRALIA	INDONESIA	SINGAPORE	PHILIPPINES
DATA AND TECHNOLOGY STRATEGY	**OVERALL**	**2.54**	**2.33**	**2.71**	**2.69**
	ORGANISATION STRUCTURE AND CULTURE	2.33	2.64	2.84	2.69
	DATA STRATEGY AND RESILIENCE	2.96	1.96	2.63	2.71
	TECHNOLOGY STACK AND ROI	2.35	2.40	2.67	2.65

SINGAPORE LEADS WITH THE HIGHEST MATURITY IN ALL DATA AND TECHNOLOGY SUBCATEGORIES EXCEPT FOR DATA STRATEGY AND RESILIENCE

BARRIER	AUSTRALIA	INDONESIA	SINGAPORE	PHILIPPINES
Data and technology directives are managed outside of marketing department	30%	32%	42%	40%
Internal pushback against implementation/experimentation with solutions	40%	26%	30%	46%
Cost of implementing/experimenting with new solutions	30%	38%	34%	38%
Lack of support from technology partners	28%	38%	32%	40%
Concerns over consumer data privacy	46%	24%	34%	30%
Data and technology directives are managed outside of local market and/or APAC region	30%	22%	34%	38%
Unsure of available solutions available on market	22%	18%	22%	34%
Desired solutions are not offered by current technology partner(s)	28%	26%	20%	20%
Lack of measurement/reporting capabilities	24%	12%	18%	40%
Lack of support from agency partners	26%	6%	24%	32%
Lack of first-party data	18%	12%	28%	18%
Education/training issues	20%	14%	16%	20%
Recruitment issues	22%	14%	10%	22%
No barriers preventing us from reaching maturity level	2%	0%	0%	4%

BY COMPANY SIZE

Overall maturity remains consistent across company sizes (2.48–2.53), except for medium-sized organisations (2.59).

Large brands lead in organisation structure and culture (2.87), demonstrating strong cross-functional collaboration, but struggle with externally managed directives (44%). Their lower scores in other subcategories suggest challenges in translating structural maturity into practical execution.

Small firms are comparatively stronger in technology stack and ROI measurement (2.73), where they effectively align tech capabilities with marketing strategy. However, lower data strategy scores (2.33) indicate less mature approaches to data capture and deployment. Implementation costs are frequently cited as a barrier (37%) suggesting resource constraints limit advancement.

CATEGORY	SUBCATEGORY	LARGE (>USD$100M)	MEDIUM (USD$10M–USD$100M)	SMALL (<USD$10M)
OVERALL DATA AND TECHNOLOGY MATURITY		2.48	2.59	2.53
DATA AND TECHNOLOGY STRATEGY	OVERALL	2.57	2.57	2.57
	ORGANISATION STRUCTURE AND CULTURE	2.87	2.54	2.64
	DATA STRATEGY AND RESILIENCE	2.36	2.70	2.33
	TECHNOLOGY STACK AND ROI	2.49	2.47	2.73

44%

of large brands struggle with externally managed directives

37%

of small firms cited implementation costs as a barrier

BARRIER	LARGE (>USD$100MM)	MEDIUM (USD$10MM–USD$100MM)	SMALL (<USD$10MM)
Data and technology directives are managed outside of marketing department	44%	38%	18%
Internal pushback against implementation/experimentation with solutions	33%	38%	27%
Cost of implementing/experimenting with new solutions	31%	35%	39%
Lack of support from technology partners	38%	38%	15%
Concerns over consumer data privacy	38%	34%	27%
Data and technology directives are managed outside of local market and/or APAC region	26%	35%	21%
Unsure of available solutions available on market	28%	24%	18%
Desired solutions are not offered by current technology partner(s)	33%	22%	18%
Lack of measurement/reporting capabilities	23%	27%	12%
Lack of support from agency partners	18%	23%	21%
Lack of first-party data	21%	20%	12%
Education/training issues	18%	17%	18%
Recruitment issues	21%	17%	12%
No barriers preventing us from reaching maturity level	3%	0%	6%

BY BRAND COVERAGE

Single-market brands (2.58) slightly outperform global brands (2.55). Their strength in organisation structure and culture (3.00) reflects effective cross-functional collaboration that results in fewer alignment barriers (25%) and less internal resistance (19%). However, weaker data strategy capabilities (1.88) indicate reactive approaches to data capture and usage.

Global brands struggle with technology stack and ROI, suggesting gaps between architecture and marketing strategy. Cost barriers (39%) and organisational challenges (up to 39%) often stem from complex approval processes between APAC markets and global headquarters.

Regional brands lead overall but share similar technology stack maturity levels with global brands, and face internal resistance to experimentation which limits their progression to more advanced capabilities.

CATEGORY	SUBCATEGORY	GLOBAL	REGIONAL	SINGLE-MARKET
DATA AND TECHNOLOGY STRATEGY	OVERALL	2.55	2.68	2.58
	ORGANISATION STRUCTURE AND CULTURE	2.58	2.79	3.00
	DATA STRATEGY AND RESILIENCE	2.58	2.74	1.88
	TECHNOLOGY STACK AND ROI	2.50	2.53	2.88

"

GLOBAL BRANDS STRUGGLE WITH TECHNOLOGY STACK AND ROI, SUGGESTING GAPS BETWEEN ARCHITECTURE AND MARKETING STRATEGY

BARRIER	GLOBAL	REGIONAL	SINGLE-MARKET
Data and technology directives are managed outside of marketing department	36%	40%	25%
Internal pushback against implementation/experimentation with solutions	36%	30%	25%
Cost of implementing/experimenting with new solutions	35%	35%	25%
Lack of support from technology partners	33%	50%	25%
Concerns over consumer data privacy	34%	30%	25%
Data and technology directives are managed outside of local market and/or APAC region	29%	35%	50%
Unsure of available solutions available on market	27%	5%	13%
Desired solutions are not offered by current technology partner(s)	24%	20%	13%
Lack of measurement/reporting capabilities	25%	15%	0%
Lack of support from agency partners	20%	35%	25%
Lack of first-party data	17%	35%	25%
Education/training issues	18%	20%	0%
Recruitment issues	19%	5%	0%
No barriers preventing us from reaching maturity level	1%	0%	25%

BY DIRECTIVE LEVEL

Locally-directed brands report mixed maturity: strong in organisation structure (2.88) and technology stack ROI (2.75), but weak in data strategy and resilience (2.06). Despite mature tech capabilities, they face significant barriers with tech partner support (44%) and data privacy concerns (a staggering 50%).

Brands under global and regional directives demonstrate more mature data strategies (2.60 and 2.63), reflecting structured approaches to data capture and deployment across markets. However, organisational complexity and scaling costs impede their advancement to more sophisticated capabilities.

CATEGORY	SUBCATEGORY	GLOBAL	REGIONAL	LOCAL
DATA AND TECHNOLOGY STRATEGY	OVERALL	2.60	2.54	2.56
	ORGANISATION STRUCTURE AND CULTURE	2.69	2.52	2.88
	DATA STRATEGY AND RESILIENCE	2.60	2.63	2.06
	TECHNOLOGY STACK AND ROI	2.51	2.48	2.75

"

BRANDS UNDER GLOBAL AND REGIONAL DIRECTIVES DEMONSTRATE MORE MATURE DATA STRATEGIES

BARRIER	GLOBAL	REGIONAL	LOCAL
Data and technology directives are managed outside of marketing department	35%	38%	25%
Internal pushback against implementation/experimentation with solutions	32%	41%	19%
Cost of implementing/experimenting with new solutions	39%	33%	25%
Lack of support from technology partners	36%	31%	44%
Concerns over consumer data privacy	29%	34%	50%
Data and technology directives are managed outside of local market and/or APAC region	38%	26%	25%
Unsure of available solutions available on market	22%	27%	13%
Desired solutions are not offered by current technology partner(s)	21%	28%	6%
Lack of measurement/reporting capabilities	25%	22%	25%
Lack of support from agency partners	25%	21%	13%
Lack of first-party data	18%	22%	6%
Education/training issues	19%	17%	13%
Recruitment issues	14%	18%	25%
No barriers preventing us from reaching maturity level	0%	1%	13%

SECTION 3:

DATA FOUNDATION

APAC brands report moderate maturity in data foundation (2.55), but with the highest standard deviation (±1.12) among all categories, indicating significant variation in how organisations manage and unify their first-party data. Maturity levels remain similar across both data capture and quality (2.55) and identity resolution (2.54).

DATA FOUNDATION — MATURITY

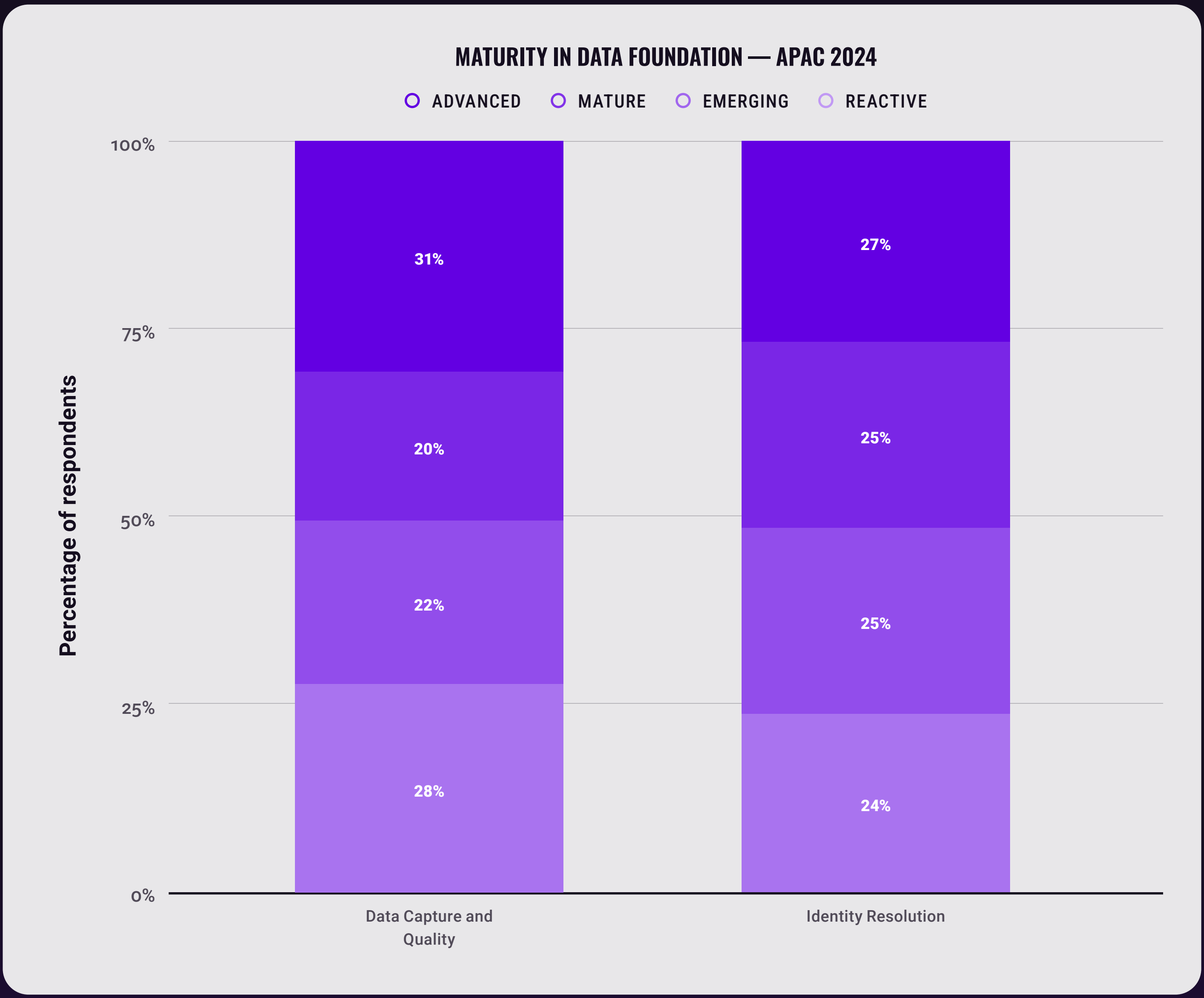
	OVERALL	DATA CAPTURE AND QUALITY	IDENTITY RESOLUTION
MEAN MATURITY RATING	2.55	2.55	2.54
± STANDARD DEVIATION	± 1.12	± 0.96	± 1.19

Data capture and quality shows similar division:

- 28% operate reactively with minimal data capture and quality controls
- 22% demonstrate emerging capabilities, using basic analytics tools but lacking quality frameworks
- 50% show mature or advanced capabilities, employing tag management systems for online capture, data onboarding for offline conversions, and comprehensive frameworks for data quality and freshness. The most advanced brands additionally deploy server-side tracking for enhanced data control, durability, and security

For identity resolution, brands distribute evenly across maturity stages:

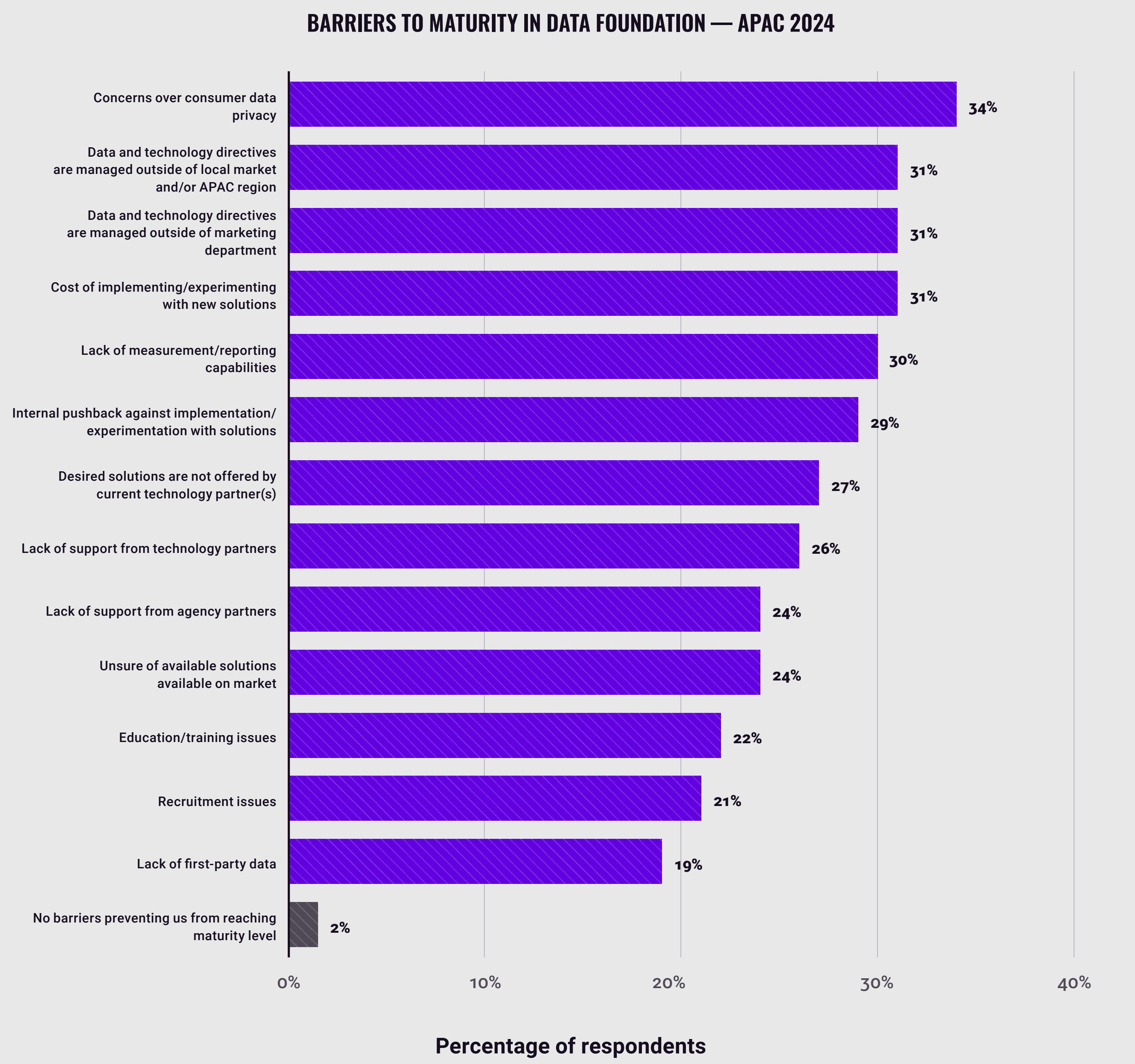
- 24% operate reactively, collecting data ad hoc with minimal storage visibility
- 25% remain emerging, capturing customer IDs within individual platforms without unification plans
- 51% achieve mature or advanced status, centralising data around persistent user IDs and leveraging privacy-protected identifiers for omnichannel activation through external ID graphs and data clean rooms



Lower maturity in the category is due in part to the following persistent barriers:

- **Data privacy concerns (34%):** Limits progression in data capture and quality initiatives
- **Organisational structure (31%):** Directives outside marketing/region impede unified approaches
- **Implementation costs (31%):** Restricts investment in advanced collection and integration tools
- **Tech partner limitations (30%):** Hampers adoption of more sophisticated identity solutions

Notably, these challenges affect organisations regardless of size, with even well-resourced brands struggling to advance beyond emerging capabilities.



BY MARKET

Singapore leads with the highest category maturity (2.60), followed closely by the Philippines (2.58), Indonesia (2.51) and Australia (2.49). Aside from Singapore, markets show little variation in category and subcategory maturity.

Singapore demonstrates the highest data capture maturity (2.71) but lowest identity resolution (2.49). This deviation may reflect challenges in deploying unified identity solutions across APAC markets, as 90% of Singapore respondents hold regional/global roles. Their most cited barrier is lack of desired solutions from current tech partners (37%).

In the Philippines, nearly half (49%) cite directives managed outside marketing as a barrier, closely followed by privacy concerns (45%). Australian brands struggle most with measurement capabilities (42%), while Indonesian respondents identify implementation costs as their primary deterrent (34%).

CATEGORY	SUBCATEGORY	AUSTRALIA	INDONESIA	SINGAPORE	PHILIPPINES
DATA FOUNDATION	OVERALL	2.49	2.51	2.60	2.58
	DATA CAPTURE AND QUALITY	2.44	2.46	2.71	2.53
	IDENTITY RESOLUTION	2.54	2.56	2.49	2.63

"

NEARLY HALF OF PHILIPPINE BRANDS CITE DIRECTIVES MANAGED OUTSIDE MARKETING AS A BARRIER TO STRONGER DATA FOUNDATIONS

BARRIER	AUSTRALIA	INDONESIA	SINGAPORE	PHILIPPINES
Concerns over consumer data privacy	31%	24%	35%	45%
Data and technology directives are managed outside of local market and/or APAC region	33%	32%	29%	29%
Data and technology directives are managed outside of marketing department	25%	18%	31%	49%
Cost of implementing/experimenting with new solutions	37%	34%	31%	20%
Lack of measurement/reporting capabilities	42%	14%	33%	31%
Internal pushback against implementation/experimentation with solutions	35%	24%	33%	22%
Desired solutions are not offered by current technology partner(s)	27%	20%	37%	24%
Lack of support from technology partners	21%	28%	18%	35%
Lack of support from agency partners	25%	10%	22%	37%
Unsure of available solutions available on market	13%	22%	29%	31%
Education/training issues	19%	20%	18%	31%
Recruitment issues	25%	18%	16%	24%
Lack of first-party data	21%	18%	16%	18%
No barriers preventing us from reaching maturity level	2%	0%	0%	4%

BY COMPANY SIZE

Paradoxically, large brands (>USD$100M) report the lowest scores across all data foundation categories (2.22 overall). Despite greater resources, they often struggle to progress beyond emerging maturity stages due to greater data fragmentation due to increased customer touchpoints and marketing breadth along more complex data governance requirements. Medium-sized firms (USD$10M–USD$100M) achieve the highest maturity (2.67), while small firms (<USD$10M) maintain moderate performance (2.51).

Large organisations cite directives managed outside the local market/region and implementation costs as their primary barriers (38% each). This reflects the operational and financial challenges of managing scaled datasets and implementing unified data strategies across markets.

CATEGORY	SUBCATEGORY	LARGE (>USD$100M)	MEDIUM (USD$10M–USD$100M)	SMALL (<USD$10M)
DATA FOUNDATION	OVERALL	2.22	2.67	2.45
	DATA CAPTURE AND QUALITY	2.23	2.66	2.42
	IDENTITY RESOLUTION	2.21	2.68	2.48

"

LARGE ORGANISATIONS CITE DIRECTIVES MANAGED OUTSIDE THE LOCAL MARKET/ REGION AND IMPLEMENTATION COSTS AS THEIR PRIMARY BARRIERS

BARRIER	LARGE (>USD$100MM)	MEDIUM (USD$10M–USD$100M)	SMALL (<USD$10MM)
Concerns over consumer data privacy	23%	38%	27%
Data and technology directives are managed outside of local market and/or APAC region	38%	27%	33%
Data and technology directives are managed outside of marketing department	28%	34%	21%
Cost of implementing/experimenting with new solutions	38%	30%	21%
Lack of measurement/reporting capabilities	23%	31%	33%
Internal pushback against implementation/experimentation with solutions	31%	31%	15%
Desired solutions are not offered by current technology partner(s)	28%	27%	27%
Lack of support from technology partners	26%	25%	27%
Lack of support from agency partners	18%	26%	21%
Unsure of available solutions available on market	26%	25%	15%
Education/training issues	28%	21%	18%
Recruitment issues	26%	21%	15%
Lack of first-party data	23%	19%	12%
No barriers preventing us from reaching maturity level	3%	0%	6%

BY BRAND COVERAGE

Regional brands lead in category maturity (2.84), driven by sophisticated data capture and quality capabilities (3.21). These organisations typically demonstrate mature tag management implementations and comprehensive data quality frameworks. Notably, fewer regional brands (20%) cite privacy concerns compared to global (35%) and single-market brands (38%). Other significant barriers for regional brands include directives being managed outside marketing and new solution costs (35% each).

Global brands report moderate maturity (2.52) with lower data capture scores (2.47) than identity resolution (2.56). They frequently cite directives managed outside local markets (32%) as a barrier, reflecting challenges in balancing global standards with local implementation.

Single-market brands report the lowest category score (2.44) with particular weakness in data capture and quality (2.25). Many remain at reactive or emerging stages, citing inadequate tech partner support (38%) as a key barrier. Despite these challenges, 25% report no barriers to achieving desired maturity, suggesting more modest maturity goals. Despite the lower category score, a staggering 25% of these brands reported no barriers to reaching their desired maturity. As was the case in data and tech strategy, single-market brands were the only group in this cut with a material number of respondents reporting no barriers.

CATEGORY	SUBCATEGORY	GLOBAL	REGIONAL	SINGLE-MARKET
DATA FOUNDATION	OVERALL	2.52	2.84	2.44
	DATA CAPTURE AND QUALITY	2.47	3.21	2.25
	IDENTITY RESOLUTION	2.56	2.47	2.63

REGIONAL BRANDS REPORT MATURE AND ADVANCED CAPABILITIES IN DATA CAPTURE AND QUALITY

BARRIER	GLOBAL	REGIONAL	SINGLE-MARKET
Concerns over consumer data privacy	35%	20%	38%
Data and technology directives are managed outside of local market and/or APAC region	32%	25%	13%
Data and technology directives are managed outside of marketing department	29%	35%	38%
Cost of implementing/experimenting with new solutions	31%	35%	13%
Lack of measurement/reporting capabilities	30%	30%	25%
Internal pushback against implementation/experimentation with solutions	28%	30%	25%
Desired solutions are not offered by current technology partner(s)	26%	30%	38%
Lack of support from technology partners	25%	25%	25%
Lack of support from agency partners	25%	20%	0%
Unsure of available solutions available on market	24%	25%	13%
Education/training issues	23%	25%	0%
Recruitment issues	22%	15%	13%
Lack of first-party data	19%	20%	0%
No barriers preventing us from reaching maturity level	1%	0%	25%

BY DIRECTIVE LEVEL

Brands receiving regional-level directives report marginally higher maturity (2.56) than those with global (2.54) or local directives (2.53). This suggests regional oversight may provide an optimal balance for data foundation capabilities, enabling standardised approaches while maintaining market responsiveness.

A staggering 63% of organisations with local directives struggle with insufficient tech partner support. Many remain at reactive stages in data capture despite achieving higher maturity in other areas. These patterns suggest that while local autonomy can accelerate some capabilities, data foundation may benefit from broader operational oversight.

CATEGORY	SUBCATEGORY	GLOBAL	REGIONAL	LOCAL
DATA FOUNDATION	OVERALL	2.54	2.56	2.53
	DATA CAPTURE AND QUALITY	2.54	2.54	2.50
	IDENTITY RESOLUTION	2.53	2.58	2.56

"

A STAGGERING 63% OF ORGANISATIONS WITH LOCAL DIRECTIVES STRUGGLE WITH INSUFFICIENT TECH PARTNER SUPPORT

BARRIER	GLOBAL	REGIONAL	LOCAL
Concerns over consumer data privacy	34%	35%	19%
Data and technology directives are managed outside of local market and/or APAC region	29%	33%	19%
Data and technology directives are managed outside of marketing department	34%	27%	31%
Cost of implementing/experimenting with new solutions	29%	31%	31%
Lack of measurement/reporting capabilities	28%	32%	25%
Internal pushback against implementation/experimentation with solutions	22%	35%	19%
Desired solutions are not offered by current technology partner(s)	25%	32%	6%
Lack of support from technology partners	29%	16%	63%
Lack of support from agency partners	25%	23%	19%
Unsure of available solutions available on market	31%	20%	6%
Education/training issues	22%	22%	19%
Recruitment issues	21%	19%	31%
Lack of first-party data	15%	23%	6%
No barriers preventing us from reaching maturity level	0%	1%	13%

SECTION 4:

AUDIENCE STRATEGY

APAC brands demonstrate a gap between vision and execution in audience strategy, reporting moderate maturity (2.56) with stronger performance in insights and segmentation (2.63) than data activation and customer journeys (2.49).

AUDIENCE STRATEGY — MATURITY

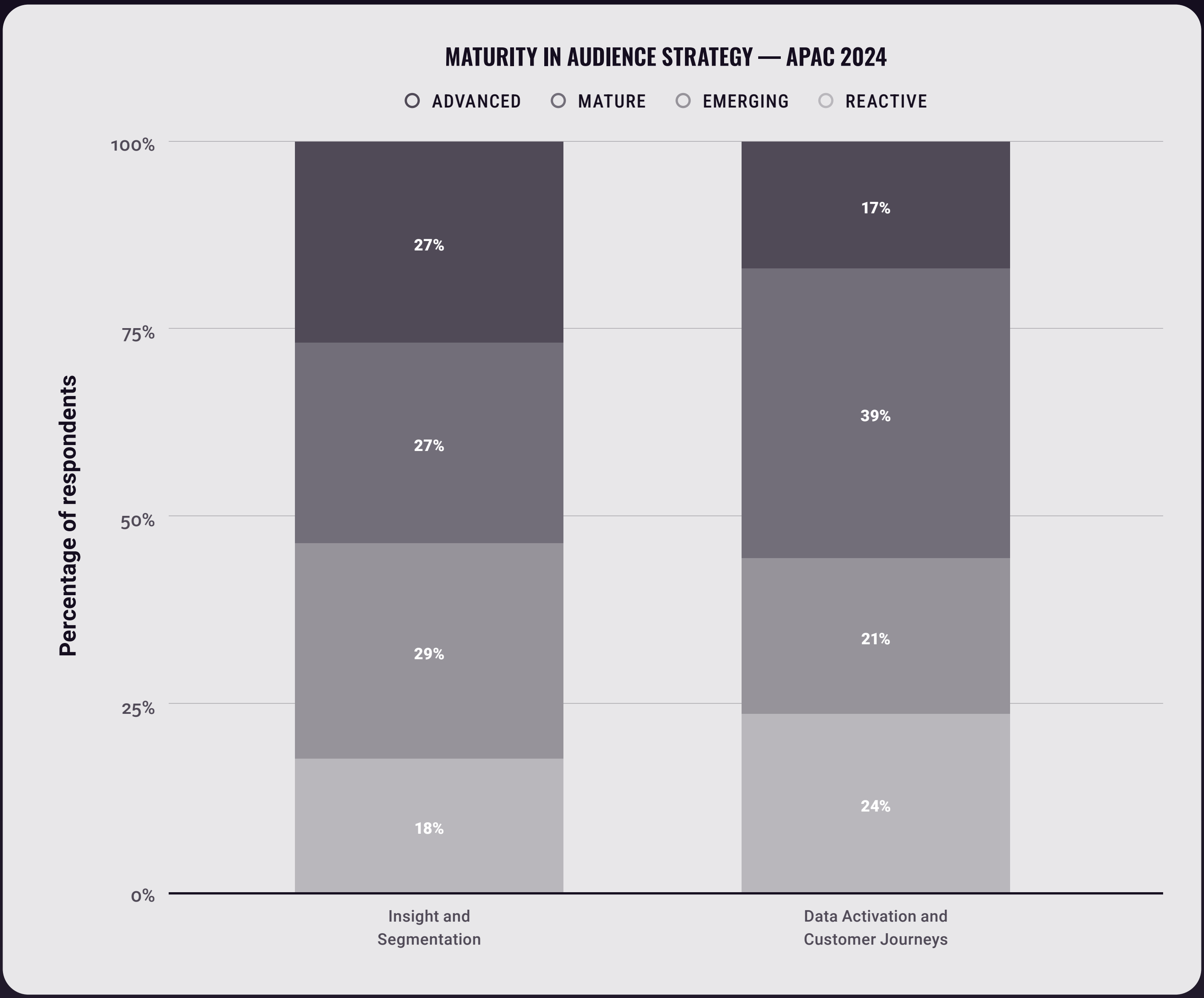
	OVERALL	INSIGHTS AND SEGMENTATION	DATA ACTIVATION AND CUSTOMER JOURNEYS
MEAN MATURITY RATING	2.56	2.63	2.49
± STANDARD DEVIATION	± 0.79	± 1.07	± 0.79

Insights and segmentation stands out as one of the strongest capabilities in this study:

- 54% of brands achieve mature or advanced levels. These organisations progress beyond basic analysis by integrating user-level data with top-down sources to generate comprehensive insights. The most advanced brands use multiple value-based signals and machine learning techniques for precise cross-channel audience identification and segmentation.
- The remaining 47% operate at reactive or emerging levels, either with limited insight capabilities or established frameworks.

Data activation and customer journeys shows greater variation:

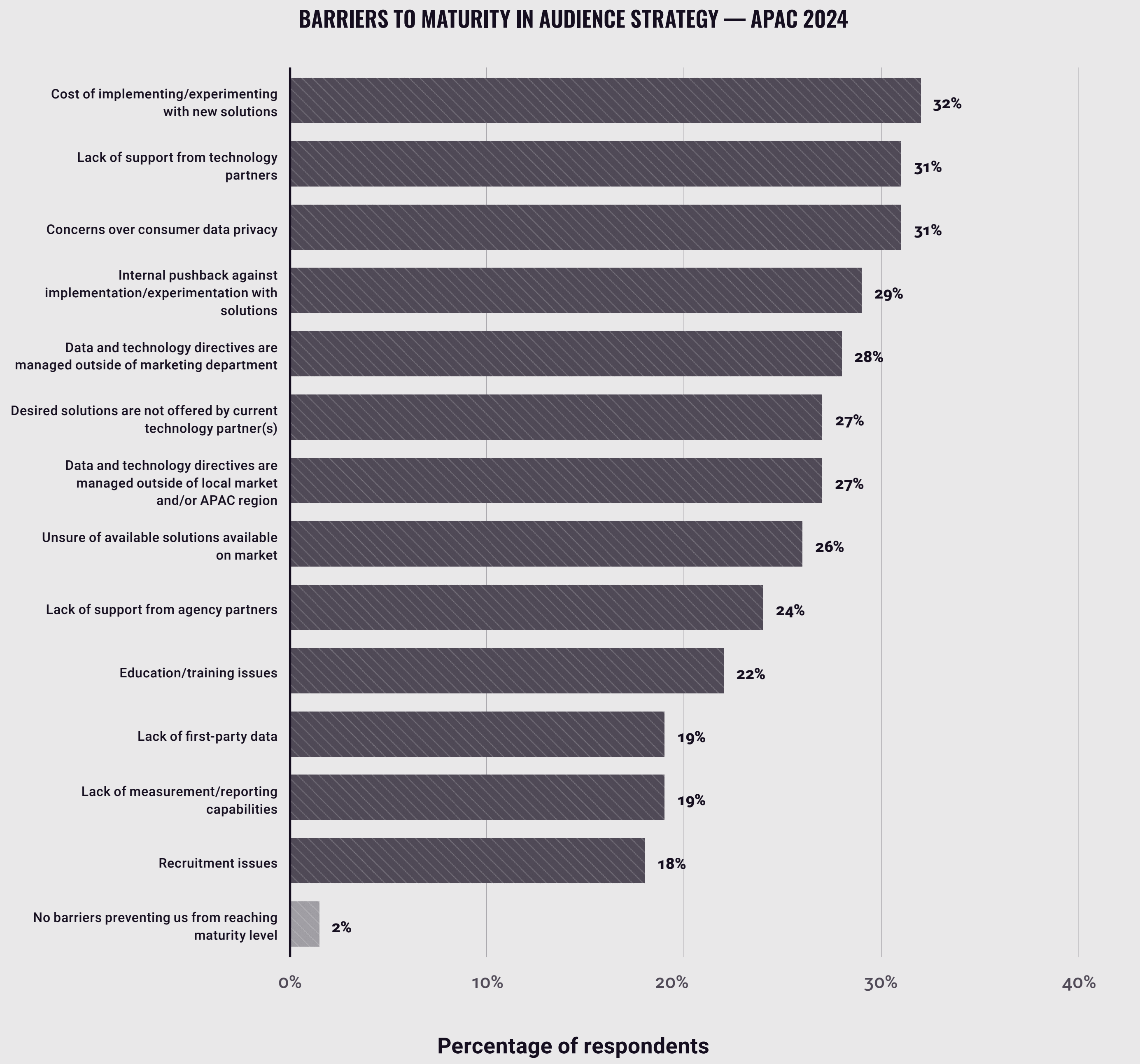
- 45% remain at reactive or emerging stages, relying primarily on basic socio-demographic targeting or limited third-party data. Their customer journeys are either single-channel or poorly optimised across channels
- 39% demonstrate mature capabilities, activating consented first-party data across channels, though often in silos due to connectivity gaps. Their customer journeys incorporate both qualitative and quantitative data
- 17% achieve advanced status, deploying first-party data alongside consented external audiences with minimal data gaps, delivering seamless experiences across online and offline channels



The category faces the following significant barriers to greater maturity:

- **Implementation costs (32%):** Major challenge for activation and orchestration initiatives, limiting ability to experiment with and implement new solutions
- **Technology partner support (31%):** Particularly impacts advancement in data activation and and customer journey capabilities
- **Data privacy concerns (31%):** Continues to challenge data activation initiatives and cross-channel deployment capabilities

These barriers particularly affect organisations attempting to move beyond informal processes to establish structured, scalable approaches.



BY MARKET

Australia leads with the highest category maturity (2.65), maintaining consistent strength across insights and segmentation (2.75) and data activation (2.56). Unlike other markets, relatively few Australian respondents cite barriers, with only directives outside marketing exceeding 30% of responses.

Singapore follows closely (2.62) with similar performance in insights (2.71) and activation (2.53). However, implementation costs pose a major challenge, cited by 43% of respondents. Additional barriers include privacy concerns, external directives, and insufficient tech partner support (31-33% each), reflecting the complexities of regional hub operations.

The Philippines (2.52) and Indonesia (2.43) show lower maturity, with Indonesia uniquely scoring higher in activation than insights. Philippine respondents cite the broadest range of barriers, with recruitment challenges mentioned twice as frequently as other markets.

CATEGORY	SUBCATEGORY	AUSTRALIA	INDONESIA	SINGAPORE	PHILIPPINES
AUDIENCE STRATEGY	OVERALL	2.65	2.43	2.62	2.52
	INSIGHTS AND SEGMENTATION	2.75	2.42	2.71	2.61
	DATA ACTIVATION AND CUSTOMER JOURNEYS	2.56	2.44	2.53	2.43

> **PHILIPPINE BRANDS REPORT THE MOST BARRIERS TO AUDIENCE STRATEGY MATURITY, AND ARE TWICE AS LIKELY TO FACE RECRUITMENT CHALLENGES COMPARED TO OTHER MARKETS**

BARRIER	AUSTRALIA	INDONESIA	SINGAPORE	PHILIPPINES
Cost of implementing/experimenting with new solutions	23%	38%	43%	24%
Lack of support from technology partners	23%	32%	31%	37%
Concerns over consumer data privacy	25%	26%	33%	39%
Internal pushback against implementation/experimentation with solutions	25%	24%	29%	37%
Data and technology directives are managed outside of marketing department	31%	22%	22%	35%
Desired solutions are not offered by current technology partner(s)	29%	30%	18%	31%
Data and technology directives are managed outside of local market and/or APAC region	27%	20%	33%	29%
Unsure of available solutions available on market	27%	28%	24%	22%
Lack of support from agency partners	29%	10%	27%	31%
Education/training issues	25%	12%	20%	29%
Lack of first-party data	17%	16%	20%	22%
Lack of measurement/reporting capabilities	19%	10%	20%	27%
Recruitment issues	13%	14%	14%	29%
No barriers preventing us from reaching maturity level	4%	0%	0%	2%

BY COMPANY SIZE

Large brands (>USD$100M) achieve the highest category maturity (2.65), driven by sophisticated data activation and customer journey capabilities (2.72). This suggests successful progression from basic targeting to advanced cross-channel orchestration.

Small brands (<USD$10M) report the lowest overall maturity (2.47), while medium-sized organisations struggle particularly with data activation (2.42), often remaining at emerging stages of deployment.

CATEGORY	SUBCATEGORY	LARGE (>USD$100M)	MEDIUM (USD$10M–USD$100M)	SMALL (<USD$10M)
AUDIENCE STRATEGY	OVERALL	2.65	2.55	2.47
	INSIGHTS AND SEGMENTATION	2.59	2.68	2.45
	DATA ACTIVATION AND CUSTOMER JOURNEYS	2.72	2.42	2.48

"

LARGE BRANDS (>USD$100M) ACHIEVE THE HIGHEST MATURITY IN AUDIENCE STRATEGY, DRIVEN BY SOPHISTICATED DATA ACTIVATION AND CUSTOMER JOURNEY CAPABILITIES

Implementation costs are particularly prohibitive for large organisations, with 49% citing this barrier. Small brands face different challenges, with privacy concerns and tech partner support (30% and 33% respectively) limiting their advancement. Medium-sized companies also referenced lack of tech partner support as a significant challenge, with 31% of respondents citing it as a barrier.

BARRIER	LARGE (>USD$100M)	MEDIUM (USD$10M–USD$100M)	SMALL (<USD$10M)
Cost of implementing/experimenting with new solutions	49%	29%	24%
Lack of support from technology partners	26%	31%	33%
Concerns over consumer data privacy	38%	28%	30%
Internal pushback against implementation/experimentation with solutions	38%	29%	15%
Data and technology directives are managed outside of marketing department	28%	29%	21%
Desired solutions are not offered by current technology partner(s)	31%	28%	18%
Data and technology directives are managed outside of local market and/or APAC region	31%	29%	15%
Unsure of available solutions available on market	23%	26%	27%
Lack of support from agency partners	18%	27%	21%
Education/training issues	13%	23%	24%
Lack of first-party data	21%	21%	9%
Lack of measurement/reporting capabilities	23%	19%	15%
Recruitment issues	21%	19%	9%
No barriers preventing us from reaching maturity level	0%	1%	6%

BY BRAND COVERAGE

Single-market brands lead in category maturity (2.69), achieving remarkably high scores in insights and segmentation (3.00) despite lower activation capabilities (2.38). This suggests advancement to sophisticated analytics and modeling capabilities while facing challenges in deployment. Half cite privacy concerns as a barrier, with implementation costs and internal resistance (both 38%) also limiting progress. As in other categories, single-market brands are by far the most likely group to report no barriers to maturity (15%).

Regional brands maintain strong performance (2.63) but show an inverse pattern — lower insights maturity (2.42) than activation capabilities (2.82). They frequently cite implementation costs (45%) and internal resistance (40%) as barriers. 30% of respondents also referenced a lack of first-party data as a barrier. While the figure isn't remarkable on its own, it's worth noting how much higher it is than with global and single-market brands.

Global brands report the lowest maturity (2.54), struggling particularly with activation (2.46). Like single-market brands, they show stronger insights capabilities (2.63), though not enough to significantly lift overall performance.

CATEGORY	SUBCATEGORY	GLOBAL	REGIONAL	SINGLE-MARKET
AUDIENCE STRATEGY	OVERALL	2.54	2.63	2.69
	INSIGHTS AND SEGMENTATION	2.63	2.42	3.00
	DATA ACTIVATION AND CUSTOMER JOURNEYS	2.46	2.84	2.38

"

GLOBAL BRANDS REPORT THE LOWEST MATURITY IN AUDIENCE STRATEGY, WITH PARTICULAR CHALLENGES IN DATA ACTIVATION AND CUSTOMER JOURNEYS

BARRIER	GLOBAL	REGIONAL	SINGLE-MARKET
Cost of implementing/experimenting with new solutions	30%	45%	38%
Lack of support from technology partners	32%	25%	13%
Concerns over consumer data privacy	32%	10%	50%
Internal pushback against implementation/experimentation with solutions	27%	40%	38%
Data and technology directives are managed outside of marketing department	27%	35%	25%
Desired solutions are not offered by current technology partner(s)	29%	20%	0%
Data and technology directives are managed outside of local market and/or APAC region	28%	20%	25%
Unsure of available solutions available on market	27%	20%	13%
Lack of support from agency partners	25%	20%	13%
Education/training issues	23%	10%	13%
Lack of first-party data	18%	30%	0%
Lack of measurement/reporting capabilities	20%	15%	13%
Recruitment issues	17%	15%	25%
No barriers preventing us from reaching maturity level	1%	5%	13%

BY DIRECTIVE LEVEL

Brands with local directives demonstrate the highest maturity (2.88), showing advanced capabilities in both insights (2.94) and activation (2.81). This suggests local autonomy enables progression to sophisticated audience capabilities, though at a cost — 56% cite implementation expenses as a barrier, while 44% struggle with privacy concerns.

Organisations receiving global (2.54) and regional directives (2.52) show similar maturity levels, both scoring higher in insights than activation. For global brands, this aligns with the in-house versus external execution pattern, illustrated by 38% citing insufficient tech partner support as a barrier.

CATEGORY	SUBCATEGORY	GLOBAL	REGIONAL	LOCAL
AUDIENCE STRATEGY	OVERALL	2.54	2.52	2.88
	INSIGHTS AND SEGMENTATION	2.61	2.59	2.94
	DATA ACTIVATION AND CUSTOMER JOURNEYS	2.47	2.45	2.81

"

BRANDS WITH LOCAL DIRECTIVES DEMONSTRATE THE MOST MATURE AUDIENCE STRATEGY CAPABILITIES OVERALL AND ACROSS SUBCATEGORIES

BARRIER	GLOBAL	REGIONAL	LOCAL
Cost of implementing/experimenting with new solutions	27%	32%	56%
Lack of support from technology partners	38%	25%	25%
Concerns over consumer data privacy	29%	29%	44%
Internal pushback against implementation/experimentation with solutions	28%	30%	19%
Data and technology directives are managed outside of marketing department	26%	30%	19%
Desired solutions are not offered by current technology partner(s)	28%	24%	38%
Data and technology directives are managed outside of local market and/or APAC region	28%	27%	19%
Unsure of available solutions available on market	27%	27%	6%
Lack of support from agency partners	22%	27%	13%
Education/training issues	22%	21%	19%
Lack of first-party data	14%	24%	13%
Lack of measurement/reporting capabilities	15%	20%	31%
Recruitment issues	18%	17%	19%
No barriers preventing us from reaching maturity level	1%	1%	6%

SECTION 5:

MEASUREMENT, REPORTING, AND OPTIMISATION

APAC brands demonstrate moderate maturity in measurement, reporting and optimisation (2.56), with notable variation across capabilities. Campaign optimisation leads (2.63), followed by dashboarding and reporting (2.58), while measurement methods (2.46) ranks as the study's lowest-scoring capability.

MEASUREMENT, REPORTING, AND OPTIMISATION — MATURITY

	OVERALL	CAMPAIGN OPTIMISATION	MEASUREMENT METHODS	DASHBOARDING AND REPORTING
MEAN MATURITY RATING	2.56	2.63	2.46	2.58
± STANDARD DEVIATION	± 0.74	± 1.02	± 1.15	± 0.88

Campaign optimisation shows strong advancement, with 58% of brands achieving mature or advanced status:

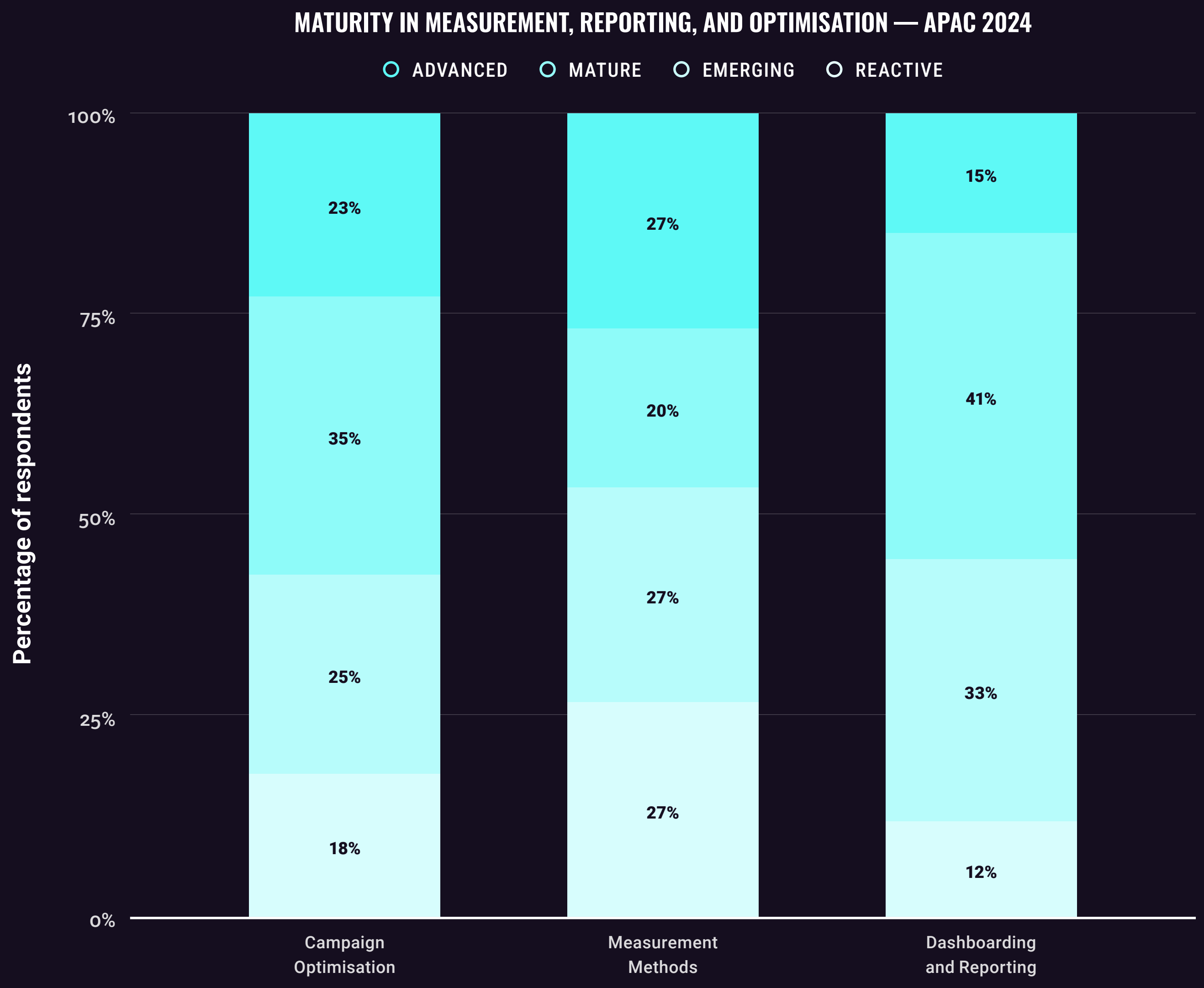
- 35% operate at mature levels, leveraging historical data and real-time signals for platform bidding
- 23% demonstrate advanced capabilities, deploying custom auto-bidders using predicted value signals directly tied to business impact
- The remaining 42% rely on manual optimisation or basic platform tools

Measurement methods present significant challenges:

- 27% remain reactive, relying solely on front-end metrics like attention and clicks
- 27% show emerging capabilities but struggle with inconsistent KPI tracking
- 46% have progressed to mature or advanced stages, employing incrementality studies and marketing mix models, with the most sophisticated brands calibrating these methods for reliable decision-making

Dashboarding and reporting reveals mixed maturity:

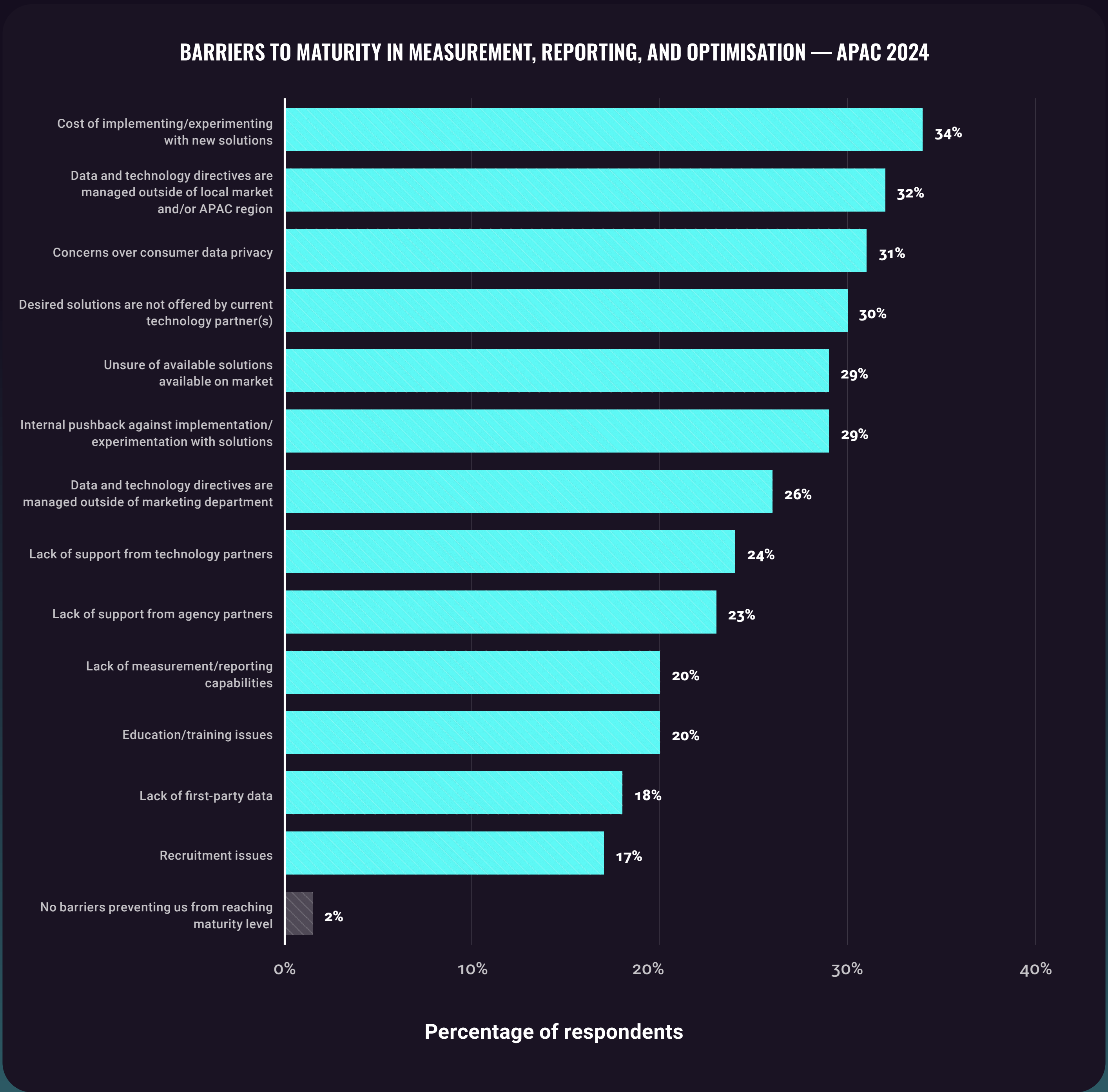
- 41% achieve mature status with cross-channel dashboards serving as a single source of truth
- 45% remain at reactive or emerging stages, struggling with siloed reporting
- 14% demonstrate advanced capabilities through fully unified, automated solutions



The category faces several key barriers preventing advancement to more sophisticated capabilities:

- **Implementation costs (34%):** Limits investment in advanced measurement frameworks
- **Non-local directive management (32%):** Impedes progression to unified reporting approaches
- **Data privacy concerns (31%):** Complicates cross-channel attribution and measurement
- **Insufficient tech partner solutions (30%):** Hampers advancement beyond basic measurement capabilities given cookie and device ID loss

Notably, education emerges as a minor barrier, suggesting organisations understand their needs but require better tools and organisational alignment to progress.



BY MARKET

Singapore leads with the highest category maturity (2.67), showing consistent strength across all subcategories. Their advanced capabilities reflect progression from basic metrics to sophisticated measurement frameworks.

The Philippines reports the lowest overall maturity (2.43), struggling particularly with dashboarding and reporting (2.29), suggesting many organisations remain at reactive stages with siloed reporting. Both Singapore and the Philippines frequently cite implementation costs and external directives as barriers, but Philippine respondents also often report privacy concerns (37%), tech partner limitations (37%), internal resistance (37%), and insufficient agency support (35%).

Australian brands lag behind in measurement methods (2.35), with many remaining at emerging stages. Their primary barriers include unclear market solutions (42%), inadequate tech partner offerings (35%), and external directive management (33%).

Indonesia demonstrates surprisingly strong performance across subcategories despite lower maturity in the other three categories. Their main challenges stem from privacy concerns (36%) and implementation costs (34%).

CATEGORY	SUBCATEGORY	AUSTRALIA	INDONESIA	SINGAPORE	PHILIPPINES
MEASUREMENT, REPORTING, AND OPTIMISATION	**OVERALL**	**2.54**	**2.58**	**2.67**	**2.43**
	MEASUREMENT METHODS	2.35	2.52	2.57	2.41
	DASHBOARDING AND REPORTING	2.67	2.58	2.78	2.29
	CAMPAIGN OPTIMISATION	2.62	2.64	2.65	2.59

"

INDONESIA DEMONSTRATES SURPRISINGLY STRONG PERFORMANCE ACROSS MEASUREMENT, REPORTING AND OPTIMISATION DESPITE LOWER MATURITY IN THE OTHER THREE CATEGORIES

BARRIER	AUSTRALIA	INDONESIA	SINGAPORE	PHILIPPINES
Cost of implementing/experimenting with new solutions	21%	34%	41%	41%
Data and technology directives are managed outside of local market and/or APAC region	33%	26%	35%	35%
Concerns over consumer data privacy	25%	36%	27%	37%
Desired solutions are not offered by current technology partner(s)	35%	16%	31%	37%
Unsure of available solutions available on market	42%	28%	20%	24%
Internal pushback against implementation/experimentation with solutions	25%	24%	29%	37%
Data and technology directives are managed outside of marketing department	29%	20%	29%	27%
Lack of support from technology partners	23%	22%	31%	20%
Lack of support from agency partners	19%	18%	18%	35%
Lack of measurement/reporting capabilities	12%	18%	27%	24%
Education/training issues	25%	12%	18%	22%
Lack of first-party data	15%	20%	12%	22%
Recruitment issues	17%	8%	16%	24%
No barriers preventing us from reaching maturity level	2%	2%	2%	2%

BY COMPANY SIZE

Medium (USD$10M-$100M) and small firms (<USD$10M) outperform large brands (>USD$100M) in overall category maturity. The difference largely comes from campaign optimisation capabilities (2.63 for medium/2.91 for small vs 2.36 for large), suggesting smaller organisations show greater agility in implementing and refining optimisation approaches.

Small brands demonstrate lower maturity in dashboarding and reporting (2.45), indicating many remain at emerging stages with siloed reporting practices.

Implementation costs are particularly challenging for large brands, with 46% citing this barrier. Both large and medium organisations frequently mention external directives (38% and 36%) as barriers. Privacy concerns affect 36% of both large and small brands but only 28% of medium-sized organisations.

CATEGORY	SUBCATEGORY	LARGE (>USD$100M)	MEDIUM (USD$10M–USD$100M)	SMALL (<USD$10M)
MEASUREMENT, REPORTING, AND OPTIMISATION	OVERALL	2.48	2.56	2.62
	MEASUREMENT METHODS	2.44	2.46	2.48
	DASHBOARDING AND REPORTING	2.64	2.59	2.45
	CAMPAIGN OPTIMISATION	2.36	2.63	2.91

"

SMALLER ORGANISATIONS SHOW GREATER AGILITY IN IMPLEMENTING AND REFINING OPTIMISATION APPROACHES

BARRIER	LARGE (>USD$100M)	MEDIUM (USD$10M–USD$100M)	SMALL (<USD$10M)
Cost of implementing/experimenting with new solutions	46%	34%	21%
Data and technology directives are managed outside of local market and/or APAC region	38%	36%	9%
Concerns over consumer data privacy	36%	28%	36%
Desired solutions are not offered by current technology partner(s)	23%	32%	27%
Unsure of available solutions available on market	31%	30%	24%
Internal pushback against implementation/experimentation with solutions	38%	27%	21%
Data and technology directives are managed outside of marketing department	26%	29%	15%
Lack of support from technology partners	15%	28%	18%
Lack of support from agency partners	26%	23%	18%
Lack of measurement/reporting capabilities	21%	18%	27%
Education/training issues	8%	22%	24%
Lack of first-party data	18%	18%	15%
Recruitment issues	15%	19%	9%
No barriers preventing us from reaching maturity level	0%	0%	12%

BY BRAND COVERAGE

Regional brands achieve the highest relative maturity (2.91), excelling particularly in dashboarding and reporting (3.00). This indicates successful progression to automated, cross-channel reporting serving as a unified source of truth. Interestingly, 40% still cite insufficient measurement capabilities as a barrier, suggesting ambitions for further advancement.

Global brands report moderate performance (2.51) with particular strength in campaign optimisation (2.64), indicating successful deployment of data-driven optimisation approaches. Implementation costs emerge as their primary barrier (35%).

Single-market brands significantly lag (1.88), struggling most with campaign optimisation (1.63). Many remain at reactive stages, citing privacy concerns, internal resistance, and external directives as key barriers (38% each).

CATEGORY	SUBCATEGORY	GLOBAL	REGIONAL	SINGLE-MARKET
MEASUREMENT, REPORTING, AND OPTIMISATION	OVERALL	2.55	2.91	1.88
	MEASUREMENT METHODS	2.44	2.84	2.00
	DASHBOARDING AND REPORTING	2.56	3.00	2.00
	CAMPAIGN OPTIMISATION	2.64	2.89	1.63

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GLOBAL BRANDS REPORT THE LOWEST MATURITY (2.54), STRUGGLING PARTICULARLY WITH ACTIVATION (2.46)

BARRIER	GLOBAL	REGIONAL	SINGLE-MARKET
Cost of implementing/experimenting with new solutions	35%	30%	13%
Data and technology directives are managed outside of local market and/or APAC region	32%	25%	38%
Concerns over consumer data privacy	31%	25%	38%
Desired solutions are not offered by current technology partner(s)	31%	20%	25%
Unsure of available solutions available on market	29%	25%	25%
Internal pushback against implementation/experimentation with solutions	28%	25%	38%
Data and technology directives are managed outside of marketing department	26%	35%	0%
Lack of support from technology partners	24%	35%	0%
Lack of support from agency partners	24%	15%	13%
Lack of measurement/reporting capabilities	18%	40%	0%
Education/training issues	20%	15%	13%
Lack of first-party data	17%	20%	13%
Recruitment issues	16%	15%	25%
No barriers preventing us from reaching maturity level	2%	0%	13%

BY DIRECTIVE LEVEL

Brands receiving global directives report the highest maturity (2.62), followed by regional (2.52) and local directives (2.46). This suggests centralised resources and support better enable measurement capability advancement than purely local decision-making.

Global directive organisations show particular strength in campaign optimisation (2.79), indicating sophisticated use of historical and real-time signals for optimisation. Implementation costs present their biggest challenge (40% of respondents).

Privacy concerns increase as directives become more local: 26% for global, 32% for regional, and 50% for local. This suggests lower confidence among locally-directed brands in navigating privacy requirements across markets.

CATEGORY	SUBCATEGORY	GLOBAL	REGIONAL	LOCAL
MEASUREMENT, REPORTING, AND OPTIMISATION	OVERALL	2.62	2.52	2.46
	MEASUREMENT METHODS	2.53	2.39	2.50
	DASHBOARDING AND REPORTING	2.54	2.63	2.50
	CAMPAIGN OPTIMISATION	2.79	2.53	2.38

"

PRIVACY CONCERNS INCREASE AS DIRECTIVES BECOME MORE LOCAL: 26% FOR GLOBAL, 32% FOR REGIONAL, AND 50% FOR LOCAL

BARRIER	GLOBAL	REGIONAL	LOCAL
Cost of implementing/experimenting with new solutions	40%	29%	31%
Data and technology directives are managed outside of local market and/or APAC region	29%	32%	44%
Concerns over consumer data privacy	26%	32%	50%
Desired solutions are not offered by current technology partner(s)	32%	28%	25%
Unsure of available solutions available on market	32%	29%	13%
Internal pushback against implementation/experimentation with solutions	28%	29%	25%
Data and technology directives are managed outside of marketing department	26%	26%	25%
Lack of support from technology partners	25%	22%	31%
Lack of support from agency partners	21%	25%	13%
Lack of measurement/reporting capabilities	19%	21%	19%
Education/training issues	14%	24%	19%
Lack of first-party data	19%	18%	6%
Recruitment issues	15%	19%	6%
No barriers preventing us from reaching maturity level	1%	2%	6%

SECTION 6:

LOOKING AHEAD

KEY TAKEAWAYS AND FUTURE CONSIDERATIONS

Our research reveals the complex nature of data and technology maturity in APAC, where organisational structure can matter more than size or resources. As the digital ecosystem continues to evolve, several key areas warrant further investigation:

ORGANISATIONAL STRUCTURE AND PERFORMANCE

The success of regional brands (2.77 maturity) and surprising challenges faced by large organisations warrant further exploration:

- Optimal organisational structures for different market contexts
- Best practices for balancing local autonomy with centralised resources
- Impact of directive level on specific capability development

PRIVACY AND IDENTITY

The significant gap between privacy concerns (32%) and first-party data challenges (18%) suggests a shifting landscape that requires deeper examination:

- Impact of emerging privacy regulations across APAC markets
- Evolution of identity resolution approaches as third-party identifiers deprecate
- Development of privacy-preserving measurement techniques

MEASUREMENT FRAMEWORK EVOLUTION

With measurement methods scoring lowest among all capabilities (2.46), future research should investigate:

- Emerging measurement approaches in a privacy-first environment
- Integration of multiple measurement methodologies
- Impact of artificial intelligence and machine learning on measurement capabilities

RECOMMENDATIONS FOR FUTURE RESEARCH

1. ROI AND SUCCESS PATTERNS

- Identify which data and technology investments yield the strongest business outcomes
- Examine successful transformation initiatives and their critical success factors
- Document specific use cases where advanced capabilities deliver measurable value
- Investigate the relationship between maturity advancement and business performance

2. LONGITUDINAL ANALYSIS

- Track maturity evolution over time to identify successful advancement patterns
- Monitor the impact of market changes on capability development
- Assess the effectiveness of different maturity advancement strategies
- Measure the long-term business impact of data and technology investments

3. DEEPER MARKET INVESTIGATION

- Examine market-specific factors driving Singapore's leadership position
- Investigate Indonesia's surprising strength in measurement despite overall lower maturity
- Analyse the relationship between market maturity and digital ecosystem development
- Identify market-specific practices that drive successful outcomes

4. ORGANISATIONAL DEEP DIVES

- Case studies of successful regional brands, documenting specific initiatives that drove value
- Analysis of effective local-global operating models and their business impact
- Investigation of successful capability advancement approaches with demonstrated ROI
- Examples of how organisations overcome common barriers to achieve positive outcomes

CLOSING THOUGHTS

The APAC region's diversity creates both challenges and opportunities in advancing data and technology capabilities. While our research provides a comprehensive view of current maturity levels, it also highlights the need to better understand what drives successful outcomes. Future studies should particularly focus on how organisations can:

- **Build privacy-preserving measurement and activation capabilities that deliver business value**
- **Develop flexible operating models that balance local and global needs while maintaining efficiency**
- **Advance measurement capabilities while demonstrating clear return on investment**
- **Identify and replicate successful data and technology initiatives across markets**

As the region continues to evolve, success will likely come not just from following a single path to maturity, but from understanding which investments and approaches drive meaningful business outcomes while accounting for market-specific conditions.

APPENDICES

APPENDIX I — MATURITY STAGES

DATA AND TECHNOLOGY STRATEGY	REACTIVE (1)	EMERGING (2)	MATURE (3)	ADVANCED (4)
Organisation structure and culture	Our departments operate in silos with minimal communication. We have no dedicated team for data-driven marketing. There is little or no data and tech knowledge among the existing marketing team. There is minimal investment in training and experimentation is rare.	There is regular but informal communication between teams. Marketing teams have digital leads, but are dependent on other departments for day-to-day data/tech needs. We recognise that data-driven marketing is important, but education/upskilling is required to turn into practical use cases.	There is regular, structured communication between teams. There is a strong focus on data-driven skills, with dedicated teams supporting data and tech related tasks within marketing. The culture actively encourages innovation, while training is conducted regularly.	There is seamless collaboration between departments. We have a deeply ingrained data-driven culture with strong specialists within the marketing team, alongside regular training with internal and external experts. There also exists cross-functional alignment between teams to drive innovation/progress in data and tech initiatives.
Data Strategy and Resilience	We have no data strategy or structured plans for capturing and using customer data. We are unable to react to future requirements and innovations.	We have a general data strategy for capturing and using customer data, but we lack customer data tactics across brands/business units. We allocate resources towards future-facing data and tech initiatives, but our approach is still reactive.	Our individual brands/business units have their own customer data tactics derived from a common data strategy. We actively seek data and tech innovations, with a process to implement those with the most potential.	There is a single, comprehensive data strategy across the entire organisation that clearly defines how and what data is captured and deployed. We take a highly proactive approach to seeking data and tech innovations, with a proven process to implement those with the most potential.
Technology Stack and ROI	Our tech stack is ad hoc and does not effectively support our marketing strategy. We have minimal visibility over the value we are deriving from our tech stack.	We have a tech architecture aligned with our marketing strategy, but there are major gaps. Campaigns that deploy martech capabilities lead to business outcomes, but we lack a framework to clearly define the value that is being driven.	Our tech stack, as defined in our architecture, is in place to support our marketing strategy. A formal framework scores the returns of martech investments.	Our marketing tech stack is complete, fully connected, and enables delivery of our marketing strategy at scale. A refined framework provides confidence in the incremental business value driven by martech investments, supporting ROI with data from structured experiments.

DATA FOUNDATION	REACTIVE (1)	EMERGING (2)	MATURE (3)	ADVANCED (4)
Data Capture and Quality	Minimal first-party data is captured. Surface-level metrics are collected from campaigns we activate within channel platforms. We have little visibility into the quality or accuracy of the data we collect or how it impacts our marketing efforts.	Site/app analytics tools and channel platform pixels are used to capture first-party data. Quality and accuracy of data collected are examined sporadically.	We deploy a tag management system to create a structured data layer across digital touchpoints, while data onboarding pipelines allow us to capture conversions from offline sources. We have a standardised framework to control for data quality and accuracy, however we do not monitor the ingested data over time for freshness.	We deploy a tag management system to create a structured data layer across all digital touchpoints, while data onboarding pipelines allow us to capture conversions from offline sources. We also use server-side tracking for improved data connections, durability, control, and security. We have a comprehensive data management framework for data quality and accuracy, which is actively monitored to ensure freshness.
Identity Resolution	We collect customer and events data on an ad hoc basis. The captured data is scattered and we have minimal visibility into how it's stored.	Customer identifiers and events are captured and managed within individual platforms (site analytics, CRM, etc). There are no plans to integrate the customer identifiers and events to create a more singular view.	Customer identifiers and events are centralised using a single, persistent user ID (where possible) to create a more singular customer view. These privacy-protected user IDs are joined with external and walled garden ID graphs to enable omnichannel deployment.	Customer identifiers and events are centralised using a single, persistent user ID (where possible) to create a more singular customer view. These privacy-protected user IDs are joined with external and walled garden ID graphs to enable omnichannel deployment. Further activation takes place via data collaboration via data clean rooms and/or CDPs.

AUDIENCE STRATEGY	REACTIVE (1)	EMERGING (2)	MATURE (3)	ADVANCED (4)
Insights and Segmentation	We have a limited ability to generate audience insights. We do not model or segment our audience data.	We generate some insights by analysing data from key sources, but our approach is not systematic. We use descriptive data to manually identify behavioural and performance segments for deployment.	We generate detailed insights by analysing data from multiple sources, often combining user-level data with top-down sources (e.g. panels). We deploy plug-and-play models to identify and address high value audiences across channels. However, these models are generally used in silos.	We generate comprehensive insights using analytics and machine learning techniques. We regularly integrate user-level data with top-down sources (e.g. panels) to provide a holistic audience view. We create and maintain custom models, incorporating a variety of value-based signals, to identify, segment, and address users across channels, and these are used across our business.
Data Activation and Customer Journeys	We rely on basic socio-demographics for audience targeting. Customer experiences and user journeys are single-channel with touchpoints and strategies operating in silos.	We activate some third-party data to target users across single journeys. Customer experiences are multi-channel but poorly optimised.	We activate our first-party data alongside some consented audiences across different channels, but often in silos due to data connectivity gaps. Multi-channel user journeys are informed by both qualitative and quantitative data.	We activate our first-party data alongside consented third-party audiences across all channels, with little to no data connectivity gaps. User journeys and experiences are seamless across all online and offline channels.

MEASUREMENT, REPORTING, AND OPTIMISATION	REACTIVE (1)	EMERGING (2)	MATURE (3)	ADVANCED (4)
Campaign Optimisation	Campaign optimisation is manual, relying on basic adjustments. There is limited use of data to inform these optimisations.	Campaign optimisation is reactive and based on levers that correlate with target value signals and KPIs. We optimise some campaigns using platform bidders.	Optimisation is informed by a combination of historical data and real-time signals. We use no-code or low-code methods to ingest these signals into platform bidders.	We create and maintain custom auto-bidders that use predicted value signals to optimise campaigns for direct business impact. These are calibrated using real-time signals alongside historical data to ensure maximum incremental business impact.
Measurement Methods	We track front-end metrics (attention, clicks, engagement) but have no formal KPIs to track conversions or business outcomes.	Campaign KPIs are assigned to campaigns, channels and strategies, but with inconsistencies. Where feasible, we apply modelled attribution (over last-click) for in-flight campaign optimisation.	Campaign KPIs are formalised and applied across campaigns, channels, and strategies. We use brand and conversion lift studies to measure incrementality, and marketing mix models for long-term planning.	Statistically-proven campaign KPIs against business needs are formalised and applied across all campaigns, channels, and strategies. Our measurement framework calibrates outcomes from in-flight attribution, incrementality from experiments, and marketing mix models, supporting both short-term optimisation and long-term planning.
Dashboarding and Reporting	Reports are siloed and manually created with low operational efficiency. We are often reliant on vendors to provide channel-level reporting.	Key reports are automated but remain siloed across channels and/or departments. There is no single source of truth for conversions and ROI.	Automated, cross-channel reporting dashboards are used across departments. Data is cleaned and deduplicated, serving as a single source of truth for conversions and ROI.	We create and maintain a unified, fully automated, cross-channel dashboard that provides all departments with access to performance and ROI data.

APPENDIX II — MATURITY SUMMARY

CATEGORY	SUB-CATEGORY	MEAN AVERAGE ± STANDARD DEVIATION
OVERALL DATA AND TECHNOLOGY MATURITY		2.56 ± 0.37
DATA AND TECHNOLOGY STRATEGY	OVERALL	2.57 ± 0.72
	ORGANISATION STRUCTURE AND CULTURE	2.62 ± 1.18
	DATA STRATEGY AND RESILIENCE	2.57 ± 1.13
	TECHNOLOGY STACK AND ROI	2.52 ± 1.10
DATA FOUNDATION	OVERALL	2.55 ± 1.12
	DATA CAPTURE AND QUALITY	2.55 ± 0.96
	IDENTITY RESOLUTION	2.54 ± 1.19
AUDIENCE STRATEGY	OVERALL	2.56 ± 0.79
	INSIGHTS AND SEGMENTATION	2.63 ± 1.07
	DATA ACTIVATION AND CUSTOMER JOURNEYS	2.49 ± 1.03
MEASUREMENT, REPORTING AND OPTIMISATION	OVERALL	2.56 ± 0.74
	MEASUREMENT METHODS	2.46 ± 1.15
	DASHBOARDING AND REPORTING	2.58 ± 0.88
	CAMPAIGN OPTIMISATION	2.63 ± 1.02

APPENDIX III — SUB-CATEGORY CORRELATION MATRIX

	ORGANISATION STRUCTURE & CULTURE	DATA STRATEGY AND RESILIENCE	TECHNOLOGY STACK AND ROI	DATA CAPTURE AND QUALITY	IDENTITY RESOLUTION	INSIGHTS AND SEGMENTATION	DATA ACTIVATION AND CUSTOMER JOURNEYS	CAMPAIGN OPTIMISATION	MEASUREMENT METHODS	DASHBOARDING AND REPORTING	OVERALL MATURITY
ORGANISATION STRUCTURE & CULTURE	1.00	-0.07	0.40	-0.29	-0.23	0.22	0.14	-0.01	-0.17	-0.02	0.22
DATA STRATEGY AND RESILIENCE	-0.07	1.00	-0.04	-0.04	-0.11	0.09	0.08	0.02	-0.05	0.14	0.25
TECHNOLOGY STACK AND ROI	0.40	-0.04	1.00	-0.32	-0.20	0.22	-0.01	0.01	-0.12	0.00	0.19
DATA CAPTURE AND QUALITY	-0.29	-0.04	-0.32	1.00	0.39	-0.19	-0.02	0.12	0.39	0.11	0.46
IDENTITY RESOLUTION	-0.23	-0.11	-0.20	0.39	1.00	-0.16	-0.07	0.05	0.26	-0.06	0.38
INSIGHTS AND SEGMENTATION	0.22	0.09	0.22	-0.19	-0.16	1.00	0.12	-0.13	-0.12	0.01	0.35
DATA ACTIVATION AND CUSTOMER JOURNEYS	0.14	0.08	-0.01	-0.02	-0.07	0.12	1.00	-0.21	-0.11	-0.10	0.32
CAMPAIGN OPTIMISATION	-0.01	0.02	0.01	0.12	0.05	-0.13	-0.21	1.00	0.30	0.35	0.33
MEASUREMENT METHODS	-0.17	-0.05	-0.12	0.39	0.26	-0.12	-0.11	0.30	1.00	0.23	0.46
DASHBOARDING AND REPORTING	-0.02	0.14	0.00	0.11	-0.06	0.01	-0.10	0.35	0.23	1.00	0.36
OVERALL MATURITY	0.22	0.25	0.19	0.46	0.38	0.35	0.32	0.33	0.46	0.36	1.00

1 0.5 0 -0.5 -1

Correlation

APPENDIX IV — COMPANY SIZE (MICRO) BREAKOUT

CATEGORY	SUB-CATEGORY	LARGE (>USD$100M)	MEDIUM (USD$10M-USD$100M)	SMALL (USD$5M-USD$10M)	MICRO (<USD$5M)	APAC AVERAGE
OVERALL DATA AND TECHNOLOGY MATURITY		2.48	2.59	2.53	2.52	2.56
DATA AND TECHNOLOGY STRATEGY	OVERALL	2.57	2.57	2.70	2.38	2.57
	ORGANISATION STRUCTURE AND CULTURE	2.87	2.54	2.79	2.43	2.62
	DATA STRATEGY AND RESILIENCE	2.36	2.70	2.53	2.07	2.57
	TECHNOLOGY STACK AND ROI	2.49	2.47	2.79	2.64	2.52
DATA FOUNDATION	OVERALL	2.22	2.67	2.24	2.75	2.55
	DATA CAPTURE AND QUALITY	2.23	2.66	2.16	2.79	2.54
	IDENTITY RESOLUTION	2.21	2.68	2.32	2.71	2.56
AUDIENCE STRATEGY	OVERALL	2.65	2.55	2.58	2.32	2.56
	INSIGHTS AND SEGMENTATION	2.59	2.68	2.63	2.21	2.63
	DATA ACTIVATION AND CUSTOMER JOURNEYS	2.72	2.42	2.53	2.43	2.49
MEASUREMENT, REPORTING AND OPTIMISATION	OVERALL	2.48	2.56	2.60	2.64	2.56
	MEASUREMENT METHODS	2.44	2.46	2.37	2.64	2.46
	DASHBOARDING AND REPORTING	2.64	2.59	2.42	2.50	2.58
	CAMPAIGN OPTIMISATION	2.36	2.63	3.00	2.79	2.63

ACKNOWLEDGEMENTS

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ABOUT SKELETON KEY

Skeleton Key is an independent, digital solutions company that helps clients unlock marketing effectiveness through data and technology.

We provide services spanning data strategy, mar/adtech, customer data solutions, effectiveness measurement, and industry education.

Our approach is rooted in blending deep technical expertise with marketing fundamentals to provide tailored solutions that drive real results.

To learn more, please visit www.skeletonkey.digital

ABOUT EXCHANGEWIRE

ExchangeWire provides news and analysis on the business of media, marketing and commerce, with a specific focus on data and technology.

We offer actionable market intelligence on the trends and innovations that are shaping the media, marketing and commerce industries.

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