

Identity Indicator



Audience addressability trends
for the cookieless present

November 2023



I **The Cookieless Present**

- Intro
- Cookieless Countdown
- Current State of Identity
- Data Highlights

II **The Data**

- Consent
- ATT Framework
- Browser Cookie Policy
- User Identification
- Alternative IDs

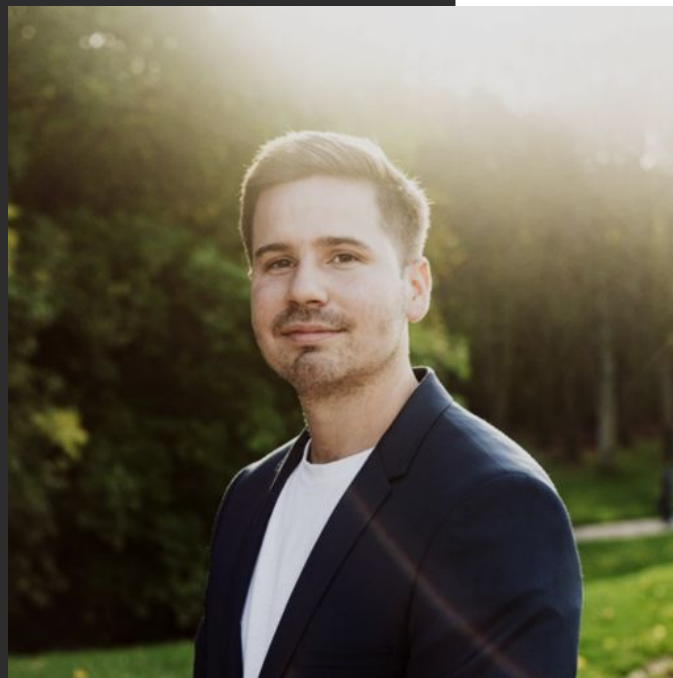
III **The Solutions**

- Cookieless Solution Overview
- Partner Spotlight: Utiq
- Partner Spotlight: Habu

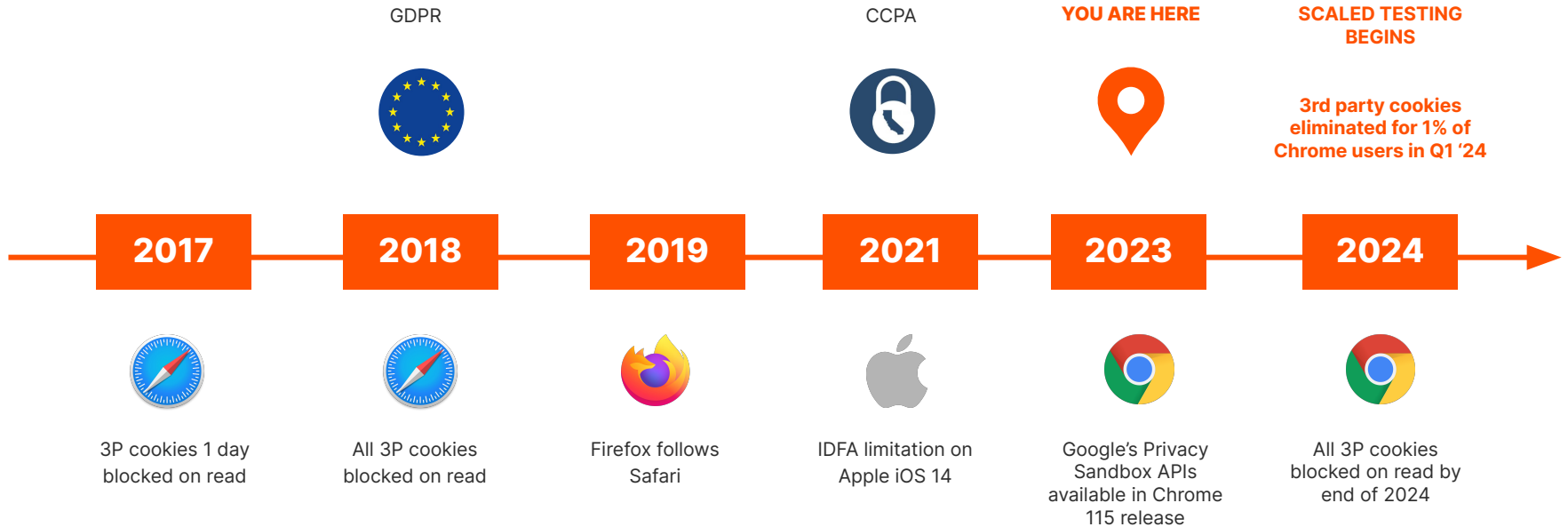
IV **Our Methodology**

—
“2024 will be the year of adoption of the universal IDs and collaboration around identity between different parties.”

Guillaume Ballin
Director, Data Partnerships at Equativ



Countdown To The End Of Cookies





The Cookieless Present

The Current State Of Identity

100+ Identity solutions exist in the digital advertising ecosystem.

[Source: Triplelift, 2021](#)

46% Of industry leaders consider themselves knowledgeable about Google's Privacy Sandbox.

[Source: IAB State of Data, 2022](#)

35% Of marketers have seen identity solution implementation result in more efficient inventory buying.

[Source: Lotame, 2022](#)



Cookieless isn't the future. It's the present.

The Equativ Identity Indicator is a snapshot of key metrics from eight major markets, providing an overview of the current state of consent and identity.

1. When ATT applies, the UK leads the way in positive consent of the markets we tracked.

With 39% of the mobile in-app inventory in the UK registering positive ATT consent, they come in well above the US, which ranked lowest at 11%.

2. Germany had the highest percentage of ad inventory limiting 3P cookies from both mobile and desktop browsers.

Given Germany was the first country to adopt data privacy laws, it's not surprising to see them leading the EU and coming in at the top across all markets tracked in both of these categories.

3. Share of publisher ad inventory sent with at least one alternative user IDs is highest in the US.

73% of publisher ad inventory in the US was sent with at least one alternative ID in the bid request. Spain was the lowest of the countries we tracked, coming in at 22%.



The Data

Consent

What is Consent?

Consent relates to whether or not users authorize the website visited to process their data. This access is granted through a Consent Management Platform (CMP).

Publishers use CMPs for: requesting, receiving and storing user consent; preferred vendors; and communicating why they are collecting user information.

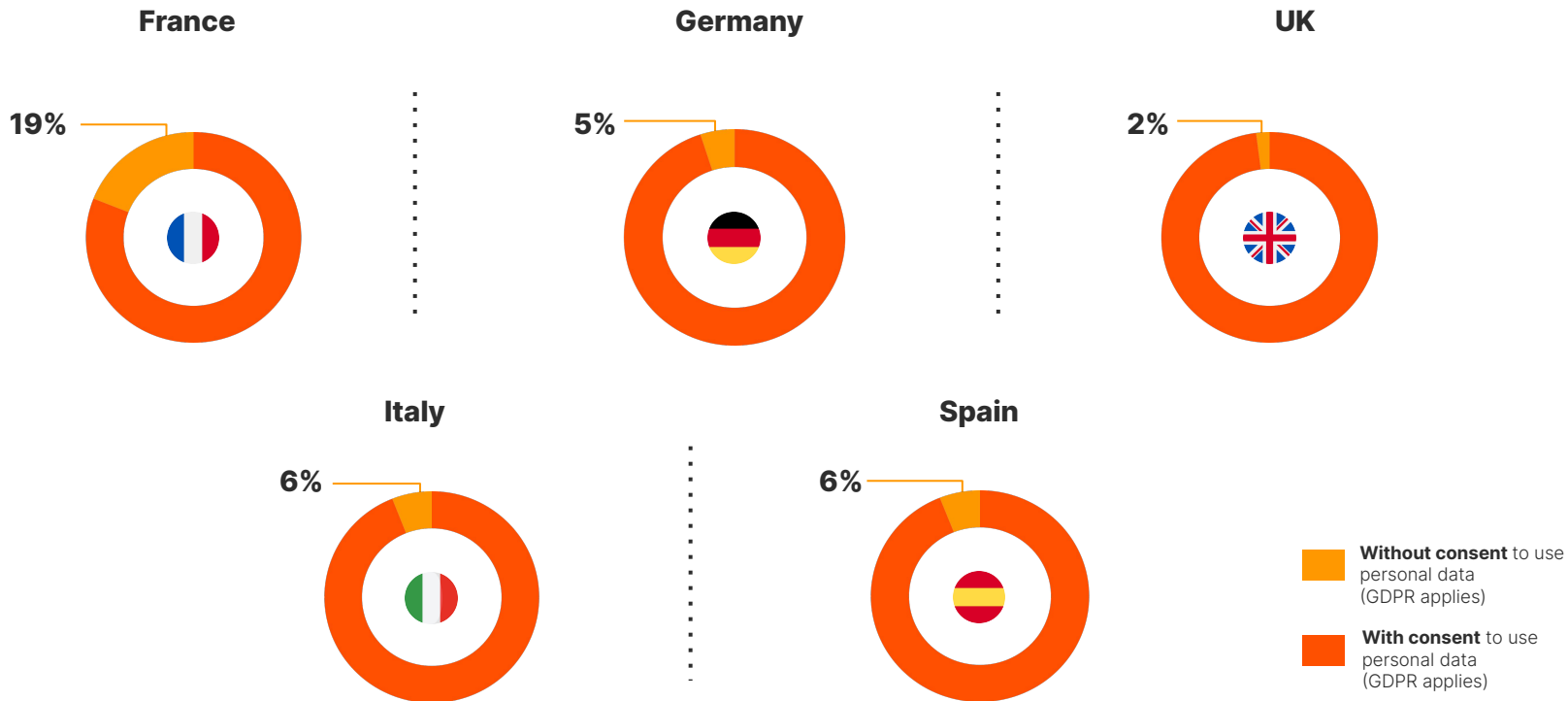


Consent Under GDPR

As concern over the use of personal data has grown, guidelines have been established in many markets to ensure the respectful use and protection of user data.

The General Data Protection Regulation (GDPR), which became a model for many national laws outside the EU, was implemented in 2018 and provides guidelines for the collection and processing of a user's personal data, both within the European Union and around the transfer of personal data outside the EU.

Share Of Ad Inventory With No Positive Consent



ATT Framework

The ATT Framework Explained

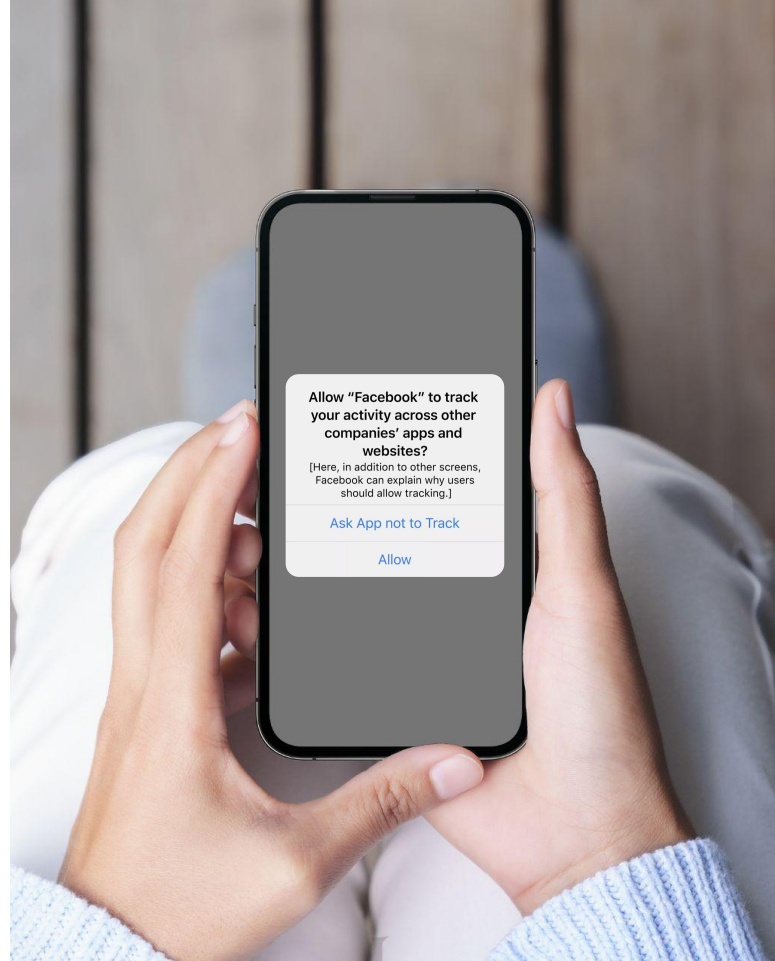
The ATT framework is Apple's IDFA opt-in mechanism introduced with iOS 14. It requests user authorization to access app-related data and permission must be granted to track the device. The framework must be used if a publisher's app collects data about end users and shares it with other companies for the purpose of tracking across apps and websites.

By default, the IDFA won't be available until publishers have implemented the framework and obtain user consent.

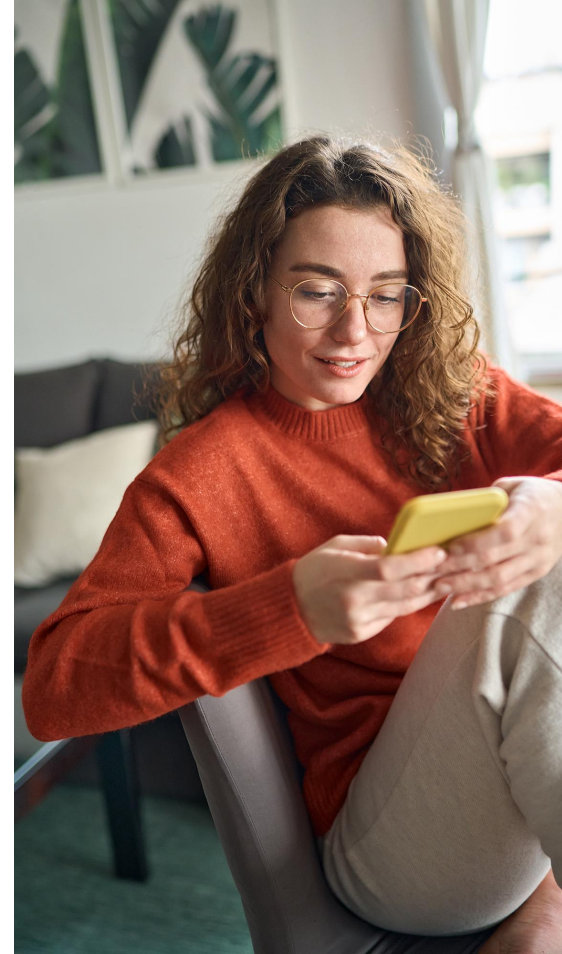
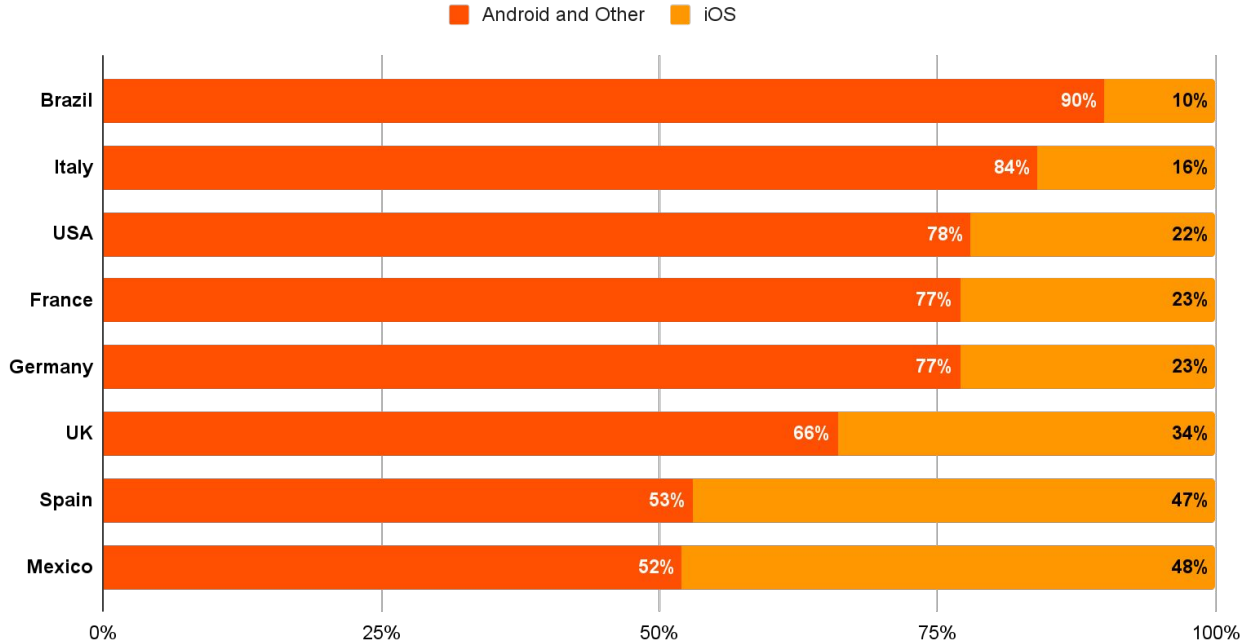
Measuring Its Impact

Publishers will be required to ask for user consent to collect and share data. When accessing an app for the first time, users will see a prompt to allow the sharing of their personal information with third parties.

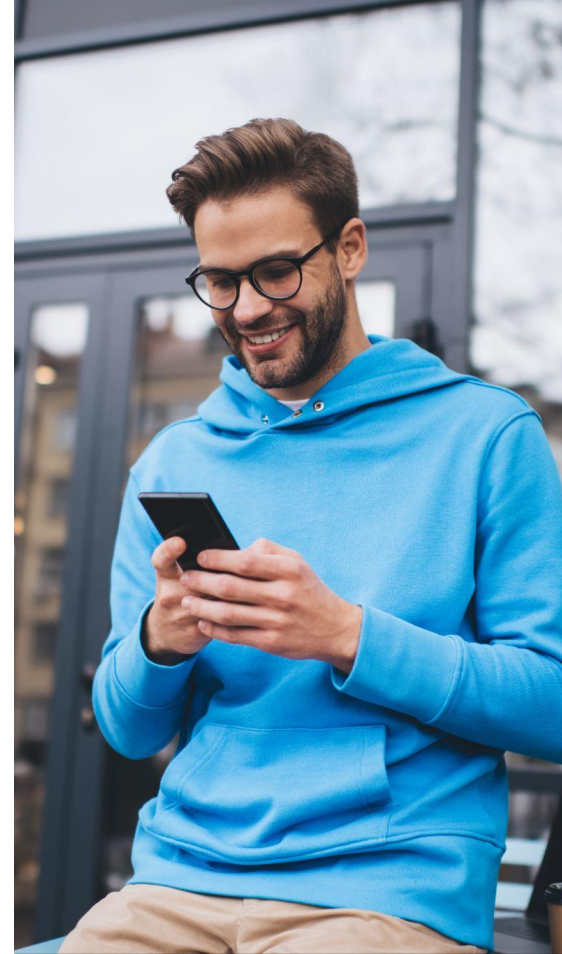
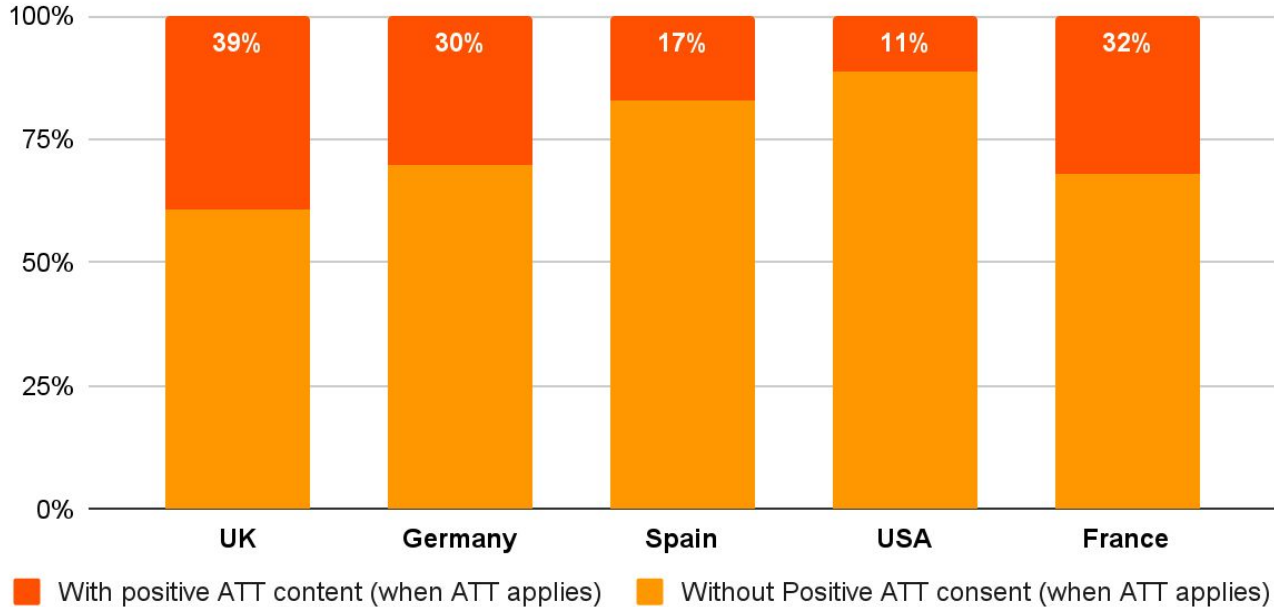
The first indicator for measuring impact is the share of in-app inventory amongst all iOS. ATT status is only measurable for Equativ when the publisher has implemented the Equativ SDK.



Share Of Mobile Inventory On Android And iOS



Share Of Mobile In-App Inventory With Positive ATT Consent



Browser Cookie Policy

Browsers Still Accepting 3rd Party Cookies



Internet Explorer 11 and Microsoft Edge: Does not restrict 3rd party cookies by default.



Google Chrome: Does not block 3rd party cookies by default, **but plans on doing so in 2024.**



Opera: Has no restrictions concerning 3rd party cookies in their policy.

Browsers Automatically Limiting 3rd Party Cookies

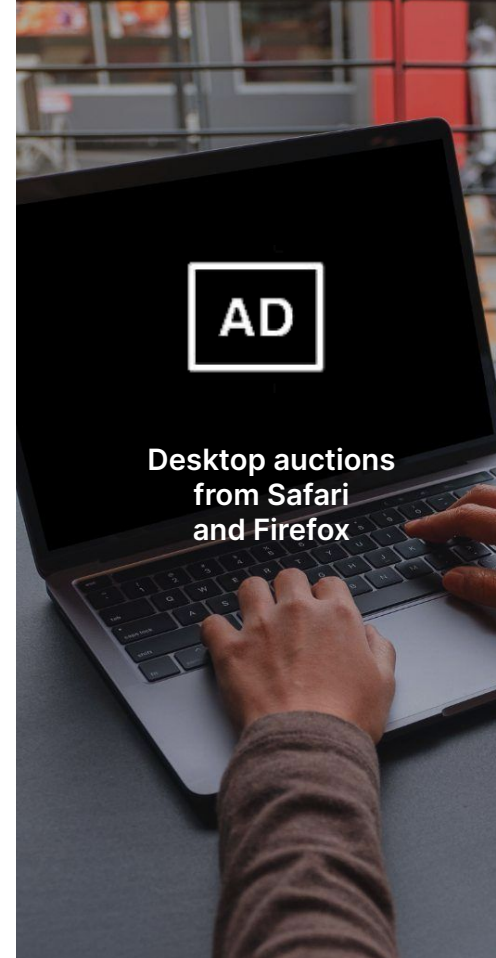
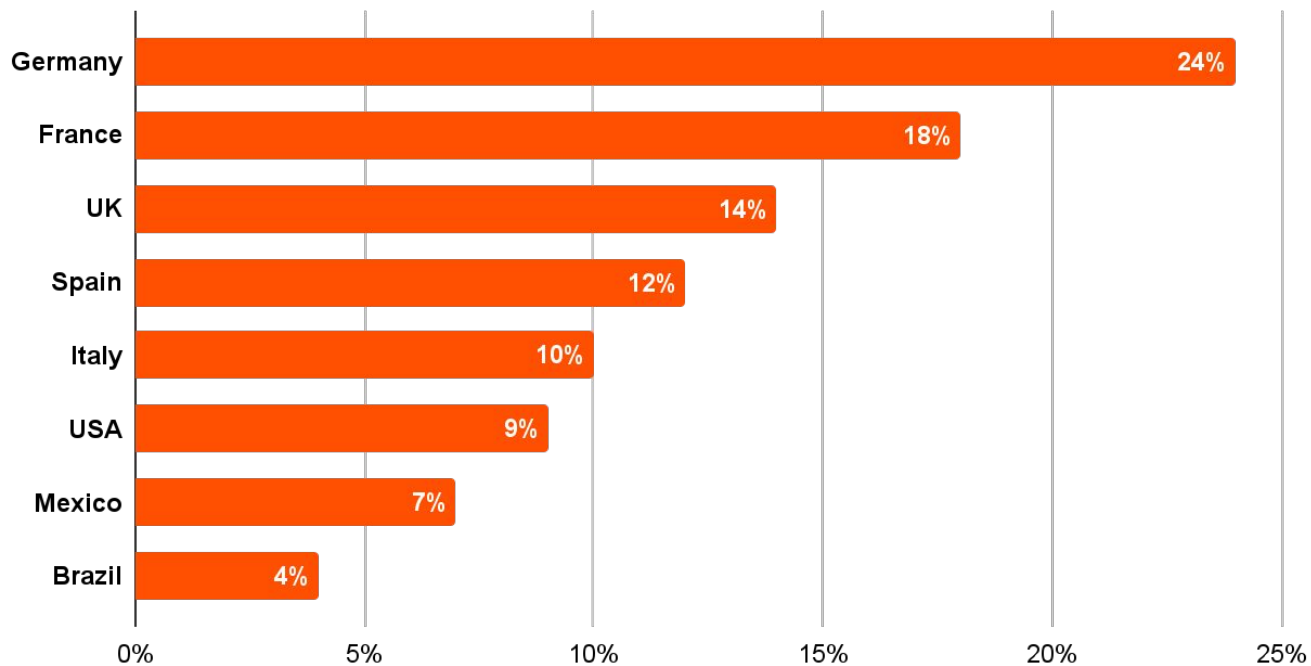


Safari: Intelligent Tracking Prevention (ITP) is in place and blocks sending cookies to third parties determined to be “trackers.”

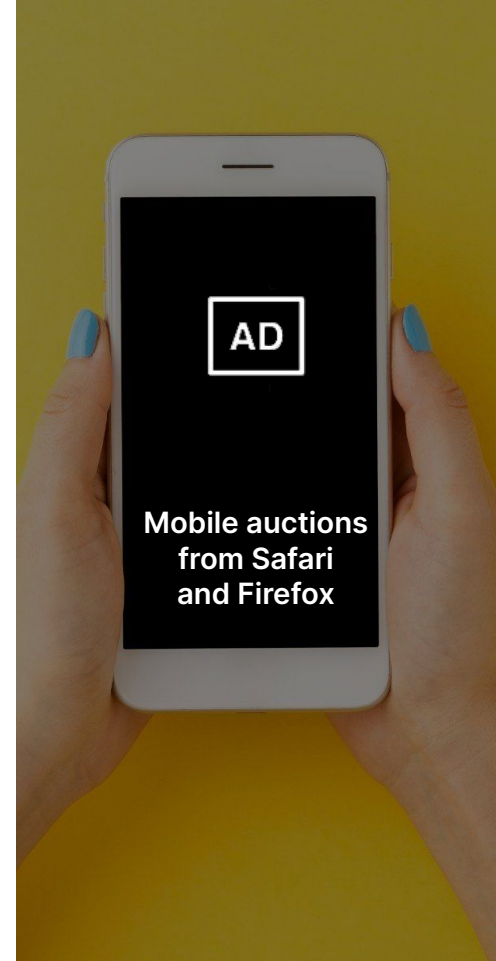
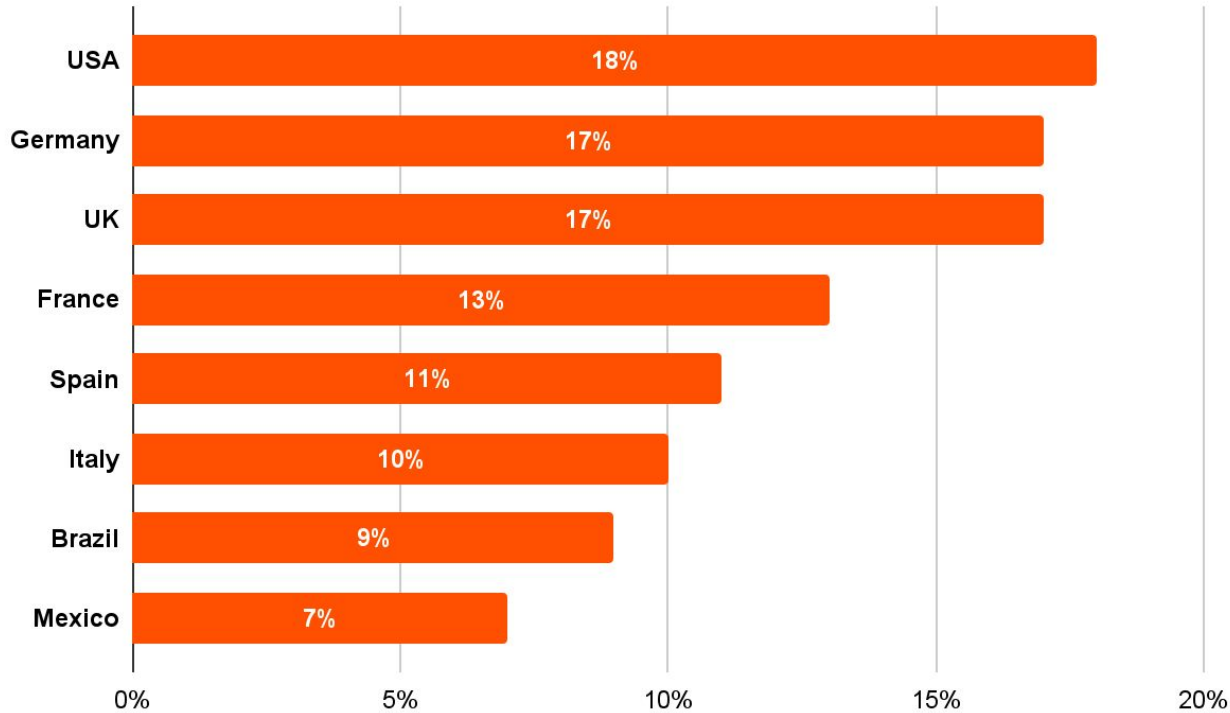


Firefox: Enhanced Tracking Protocol (ETP) limits cookies by default for desktop and Android users.

Share Of Ad Inventory From Desktop Browsers Limiting 3P Cookies



Share Of Ad Inventory From Mobile Browsers Limiting 3P Cookies



User Identification

A user ID is a single identifier associated with an individual or household across different platforms. They provide insight used to deliver more relevant ads.

One of Three Types:

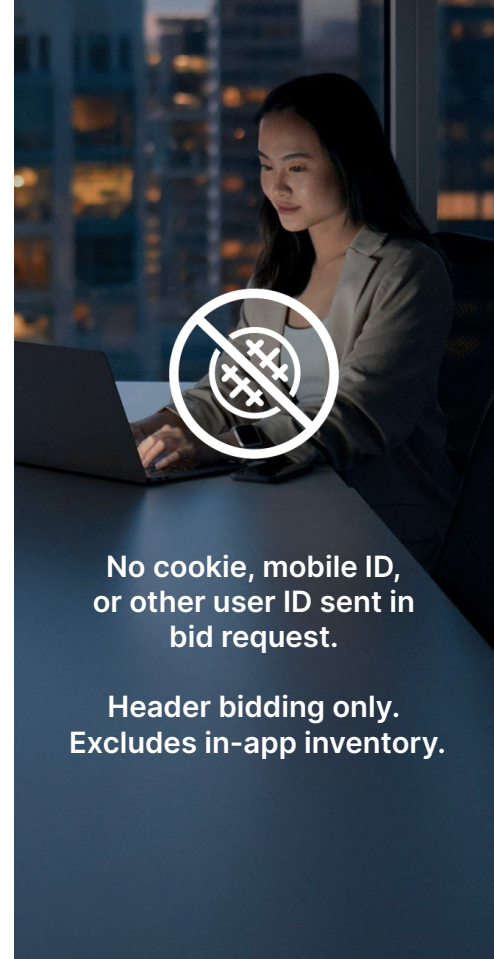
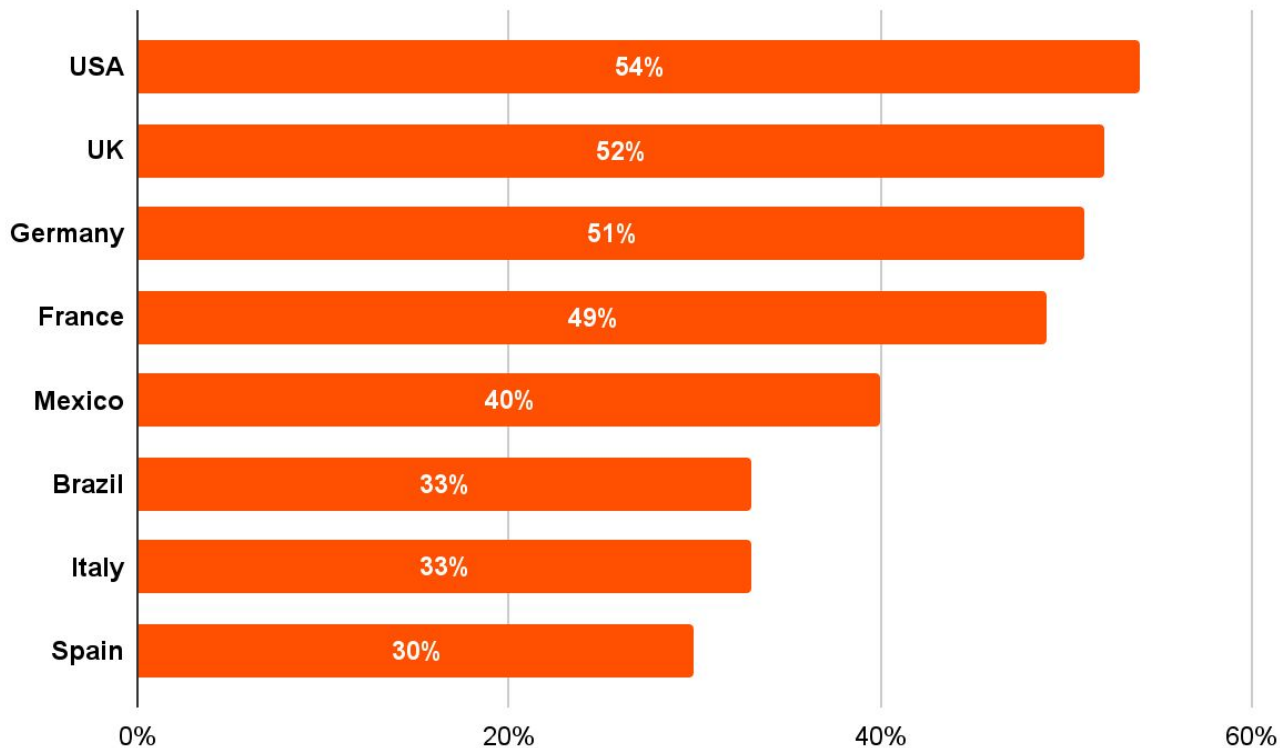
- First-party (created by a publisher)
- Third-party (created by a tech provider)
- Industry ID solution

Examples Used for Digital Advertising:

- Cookies
- Device IDs
- IFAs (Identifier For Advertising) on mobile/OTT devices



Share Of Bid Requests Without User ID



No cookie, mobile ID,
or other user ID sent in
bid request.

Header bidding only.
Excludes in-app inventory.



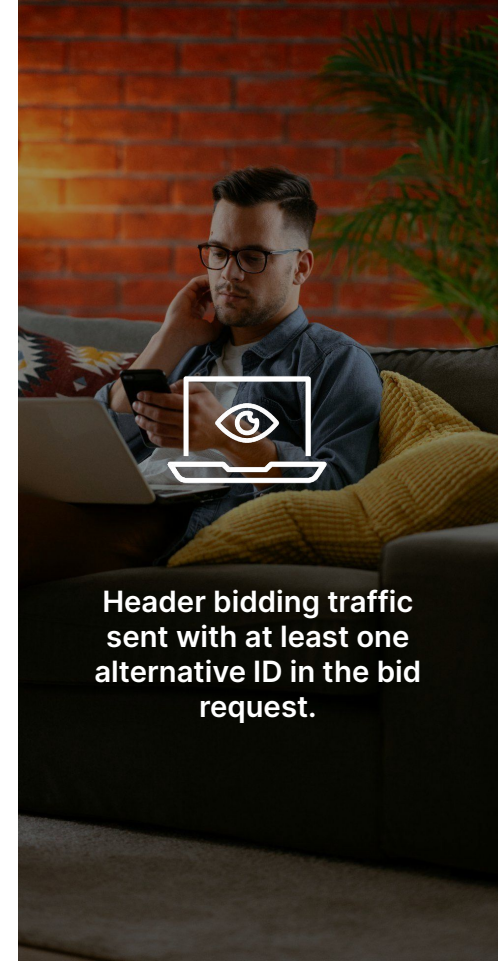
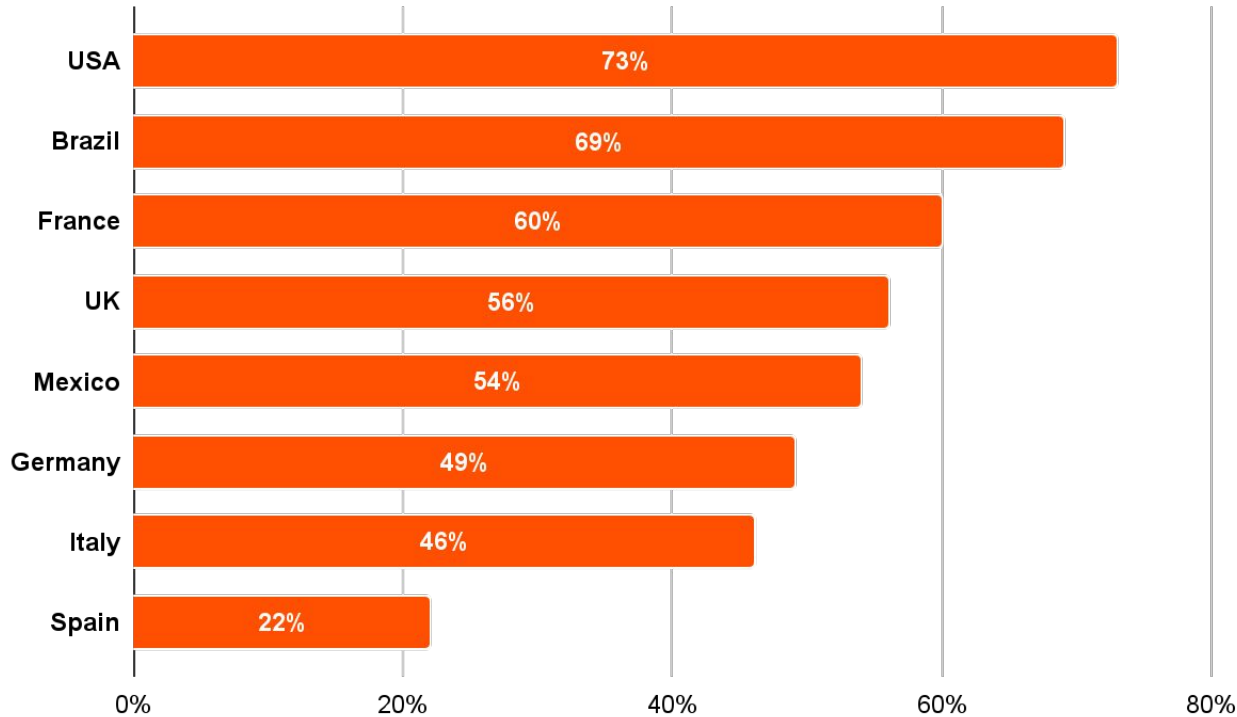
Alternative IDs

Alternative IDs aim to replace 3rd party cookies/IDs by using a same shared ID across the whole advertising chain. Some are used by multiple players while others were developed specifically for use by an individual player.

Two methods:

- **Deterministic**
Uses a user-provided piece of information, such as an e-mail address or a phone number, to create an anonymized identifier for all the websites and brands that have collected it.
- **Probabilistic**
Uses passive identification signals, such as an IP address, to create a unique pseudonymous identifier.

Share of Publisher Traffic With Alternative ID



Header bidding traffic sent with at least one alternative ID in the bid request.

Top Alternative IDs By Market

USA	✳️ ID5	☰ Prebid	🔗 theTradeDesk
Germany	☰ Prebid	✳️ ID5	🔗 theTradeDesk
UK	✳️ ID5	☰ Prebid	LOTAME PANORAMA ID
France	✳️ ID5	☰ Prebid	🔗 theTradeDesk
Mexico	✳️ ID5	🔗 theTradeDesk	☰ Prebid
Italy	🔗 theTradeDesk	✳️ ID5	☰ Prebid
Brazil	🔗 theTradeDesk	☰ Prebid	✳️ ID5
Spain	🔗 theTradeDesk	✳️ ID5	☰ Prebid



The Solutions

Are You Prepared?



Advertising is entering a new era.

In order to thrive, it's important to experiment with addressability solutions to uncover the right ones to help you overcome any challenges you face as cookies fully disappear.

The insights gained through continuous testing and learning will allow you to evolve your digital strategies without compromising on performance as cookies disappear.

At Equativ, we are ID agnostic. As the future state of our industry will be dependent on several different addressability enablers, we have invested in multiple alternative solutions to facilitate the connection between advertisers and their target audiences at scale.

Cookieless Solution Overview



User ID based strategies

No-ID strategies

Alternative IDs

Retarget users and activate data with privacy-first recognition capabilities from ID providers.

1P Data + Clean Rooms

Synchronize and leverage your 1st party data on the SSP level in a private and secure environment.

Contextual Targeting

Connect with your audience through affinity brand-relevant content creating a seamless user experience.

SDA & Cohorts Targeting

Reach users in cookie-restricted environments with SDA-cohort-based audiences through scalable 1P data.

Performance Targeting

Reach your desired performance levels through viewability and completion rate targeting capabilities.

Alternative IDs:
Telco ID

Partner Spotlight



By partnering with Utiq and supporting their Consentpass solution across our advertising chain, we aim to empower people-first, privacy-safe marketing and industry-wide change.

Utiq's Authentic Consent Service gives consumers true choice over their digital privacy, translating unambiguous preferences into encrypted data signals that can be passed efficiently along the programmatic supply chain, enabling insight-based media monetization and ad personalization.

After making informed choices on their privacy preferences, users have their consented data encrypted. From here, it is sent by Equativ's SSP to each publisher's preferred DSP. Leveraging unique telco signals creates a strong persistent connection that functions across browsers and devices, unlocking greater scalability for advertisers and publishers.

Our partnership offers a cookieless way to continue driving essential targeting, re-targeting, and frequency capping activity effectively outside walled gardens, with options available via open programmatic auctions, direct deals, and in private marketplaces.

"Respecting user privacy has been a challenge for the marketing industry, but considerations around non-compliant consent must now be a priority for all concerned.

Our mission is based on serving the long-term interests of the entire ecosystem, and integral to this is that people should have the ability to share their data in the way they choose, with full confidence it will be used fairly, whilst receiving free, high-quality content in return.

We're delighted to be working with an innovative partner like Equativ that shares this same goal."

- **Will Harmer, Chief Product Officer, Utiq**

1P Data +
Clean Rooms

Partner Spotlight



Equativ was the first industry supply-side platform to integrate with Habu, a leading Data Clean Room provider.

Habu's DCR allows us to unite multiple parties in digital advertising transactions to match their respective first-party datasets through advanced Privacy Enhancing Technologies, non-movement of data, and strict data minimization controls.

By mapping different anonymized audiences to each other, new insights improving efficiency and efficacy for both targeting and measurement campaigns can be uncovered. A key feature of the collaboration is the ability to leverage an ID graph matching different types of identifiers to form a consistent, unified view of the customer and then use it for efficient advertising.

“With our industry's current focus in pushing towards creating **privacy-first addressable solutions, responsibly harnessing first-party-data is of paramount importance** to preserve and enhance the existing standard of digital advertising use cases from targeting to measurement and attribution.

Equativ represents an exciting opportunity for collaboration as they **share our vision of harmonizing business interests for all sides while placing consumer privacy above all else.**”

- **Tim Norris-Wiles, Habu, Managing Director EMEA**

Methodology And Sources



All data in this report comes from Equativ's SSP and was compared to data in our **September 2022 report**.



All data was collected from October 1, 2023 through October 31, 2023 on web and/or mobile inventory across all Equativ's publishers for selected markets.



Data was collected for the following markets: Brazil, France, Germany, Italy, Mexico, Spain, the UK, and the USA.

Information was also retrieved from the following sources:

The IAB, Clearcode, GDPR.EU

About Equativ

As one of the leading independent adtech players, we work directly with hundreds of buyers and more than 1,000 publishers worldwide. Our independent adtech platform and shared-interest business approach enables brands and publishers to get their fair share of ad value at every opportunity, on their terms.

We prioritize accountability and transparency throughout the ecosystem and **we are helping our publishers and demand partners succeed in a cookieless future through three main initiatives.**

Visit equativ.com to learn more.

Targeting without user IDs

We are developing contextual and performance-driven cookieless targeting options and are actively testing cohort-based approaches in parallel.

Vertical integration and first-party data activation

to deliver a true value exchange and enable the user to share their data with the publishers and brands they trust.

Support of alternative IDs

We are ID agnostic and pass all IDs received in ad calls to connected DSPs. We also use alternative IDs for audience targeting and frequency capping at the SSP level and activated through PMPs or auction packages.