

# Post 3rd party cookie evolution and state of play

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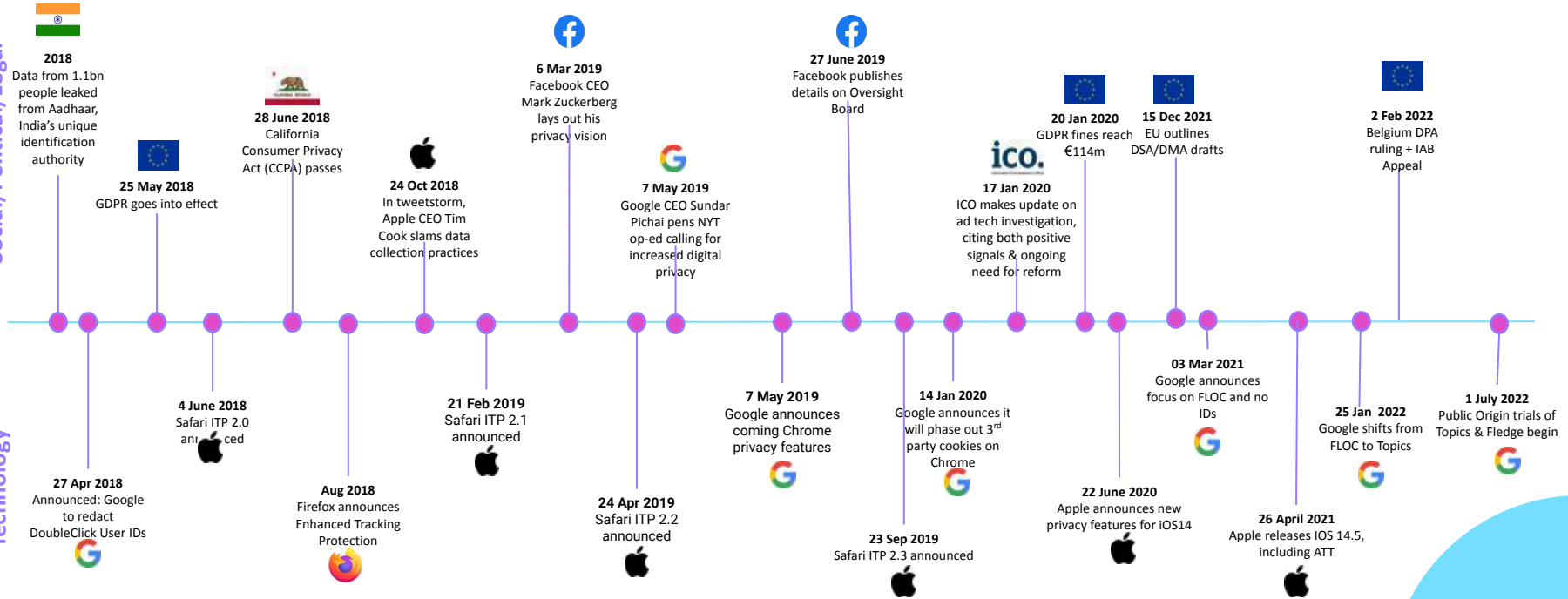


# Road to privacy—first advertising reaches back several years

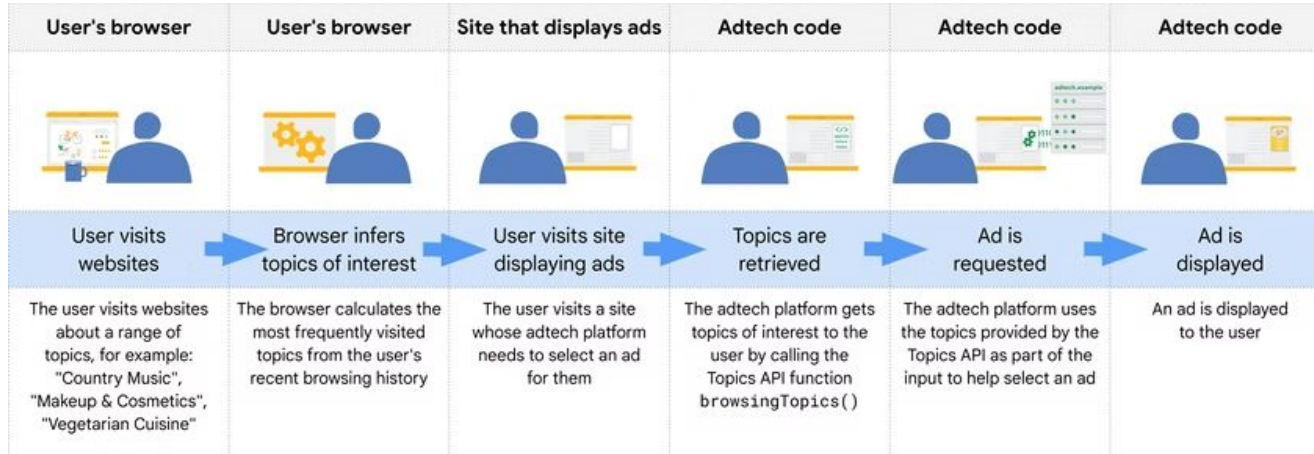
## Illustrative timeline

Social/Political/Legal

Technology

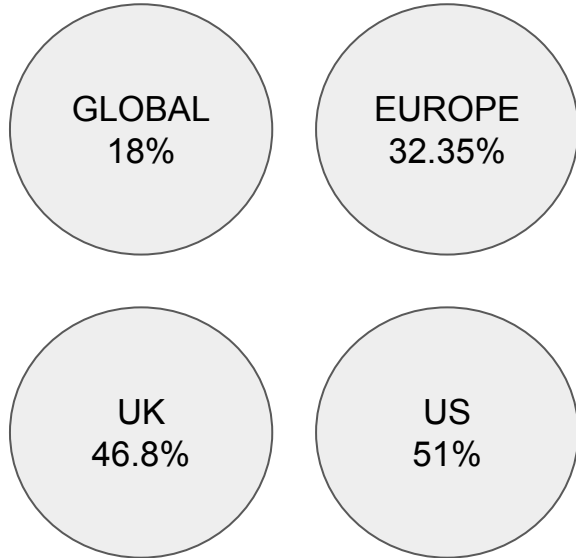


- Origin trials for Privacy Sandbox begun at the start of this year via the Canary version of Chrome.
- Topics testing has gone public as of the 1st of July
- Roll out in of Topics meant for Q4 this year and full depreciation of 3rd party cookies by Q3 2023
- ING is trustee for CMA monitoring of Privacy sandbox

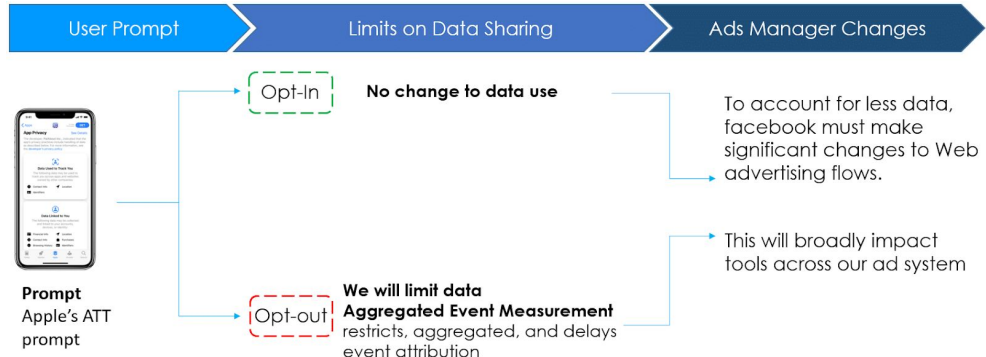


# Lets not forget Apple!

## IOS MARKET SHARE



- ATT now released for over 12 months - limits the sharing of data between third parties. Doesn't apply to Apples 1st party data.
- Apple ads reported \$68.43 billion in revenue in the company's fiscal 2021, an increase of 27%
- SKADNetwork - questions around stability, functionality and it is defining performance through Apples lens only.
- Research show application of id's within Safari environments improves performance by 2x and improves publisher revenue.



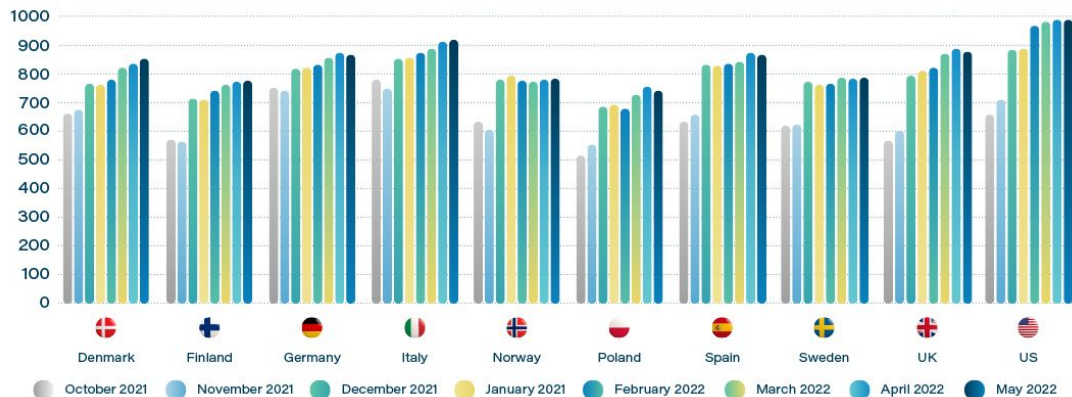
# Overview ID landscape (non-exhaustive)

- DETERMINISTIC IDENTIFIERS
- PROBABILISTIC IDENTIFIERS
- FIRST-PARTY DATA MANAGEMENT TOOLS (DMP / CDP)
- CLEAN ROOMS
- IDENTITY SOLUTIONS MANAGEMENT

ID	Differentiation	Publishers	For whom?	Pro	Con	Interoperable?
ConnectID	Based on login information	11,000+ domains	Publishers and advertisers with user login and resources	Full service, includes Yahoo DSP	Pay for service	No
CORE ID	Based on offline name and address	8000+	Publishers and advertisers with resources	Full service, includes Epsilon DSP	Pay for service, uses third-party cookie data in Chrome only	Yes
Fabrick ID	Can connect with other IDs	100s	Publishers with multiple IDs and resources	Connects multiple IDs	Bundled with other pay for product services	Yes
ID5 ID	Site level or device ID	400	Publishers and advertisers with resources	Privacy compliance and high adoption	Pay for service	No
nonID	Primarily for newsletter ads	700+	Publishers with newsletters	Works with newsletter inventory, bridges with other IDs	Requires newsletter subscription product	Yes
Panorama ID	Requires consent across publishers and devices	10,000+	Publishers with large consent-based audiences and resources	Consent-heavy ID, works with other IDs	Not encrypted	Yes
RampID	Highly interoperable	500+	Publishers and advertisers with resources	Works with multiple IDs	Pay for service	Yes
SharedID	First-party cookie owned by Prebid	30,000 domains	All publishers	Open source	Mostly inactive	No
SWID	Open source transparency based	10s	All publishers	Open source, high transparency, user can opt out at will, software is free	Low adoption, not encrypted, uses third-party cookies	Yes
UID 2.0	Decentralized industry-wide initiative	100+	All publishers and advertisers	Email address based, industry-wide	Email duplication, private company administrator	Yes

# Identity highlights

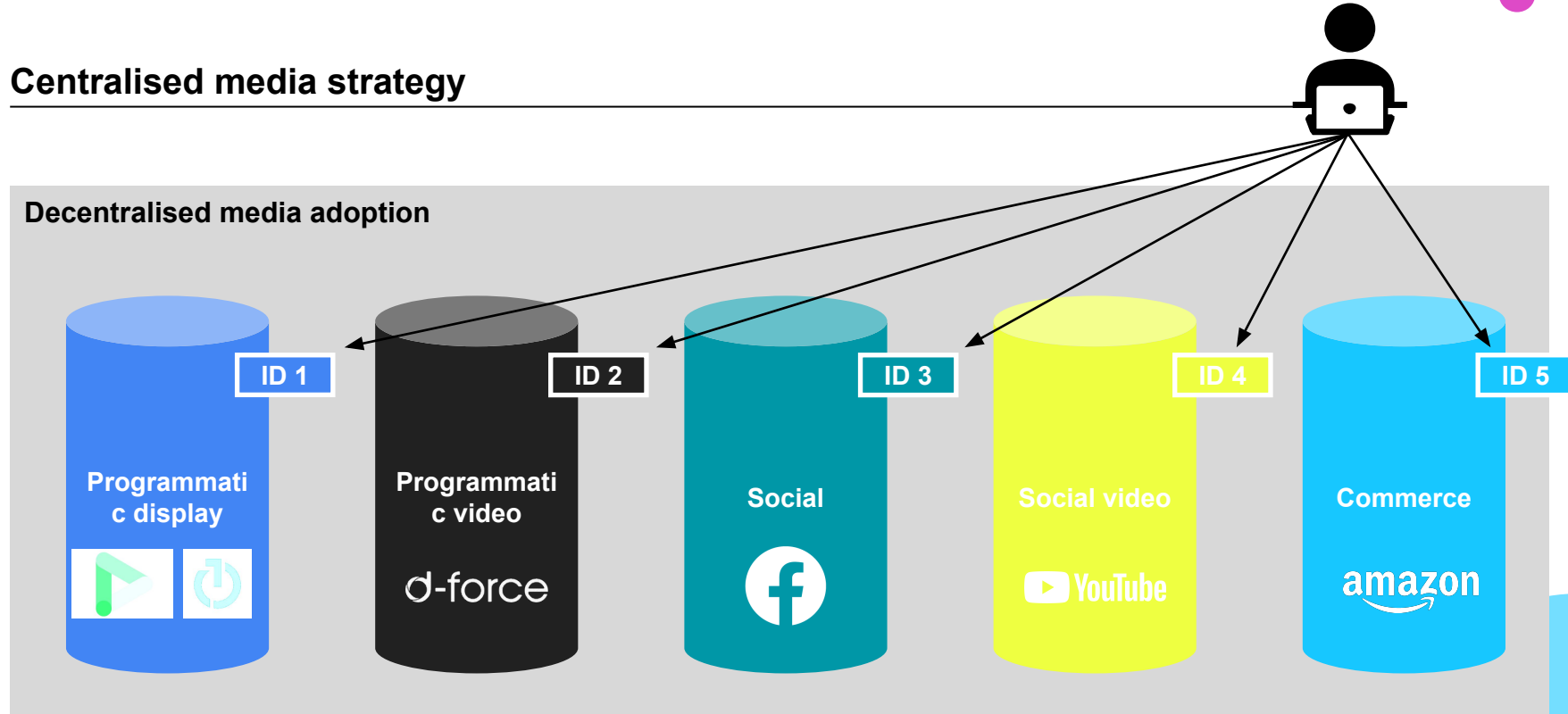
- Now 80 plus ID solutions in circulation
- UID 2.0 open sourced, however still looking for an independent technical administrator
- EUID is in conversations / early making as a European centric approach to the solution
- UID 2.0 - TTD / Liveramp / ID5 / AWS (independent operator)
- Support for 1st party ID's is strong across top 1000 domains (This includes Publisher & Unified authenticated ids).



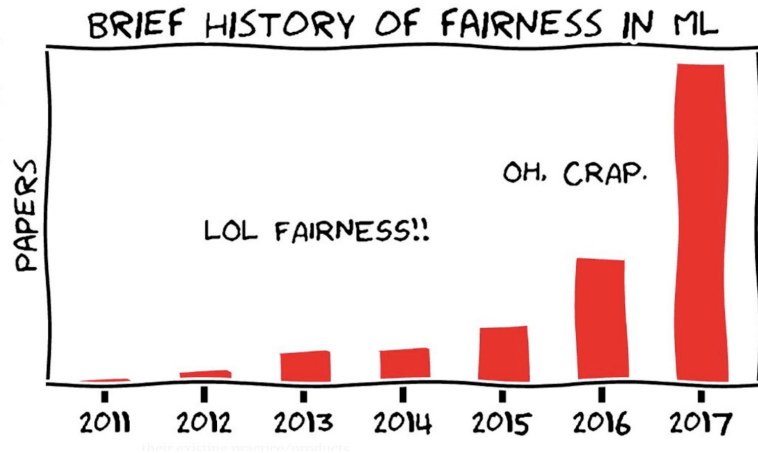
Source: <https://site.adform.com/knowledge-center/thought-leadership/the-monthly-first-party-id-adoption-update/>

# The great fragmentation: scale needs to overcome silo building

## Centralised media strategy



# Future considerations as ML & AI increase



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## A Right to Reasonable Inferences: Re-thinking Data Protection Law in the Age of Big Data and AI

09 Oct 2018



Thank you!

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