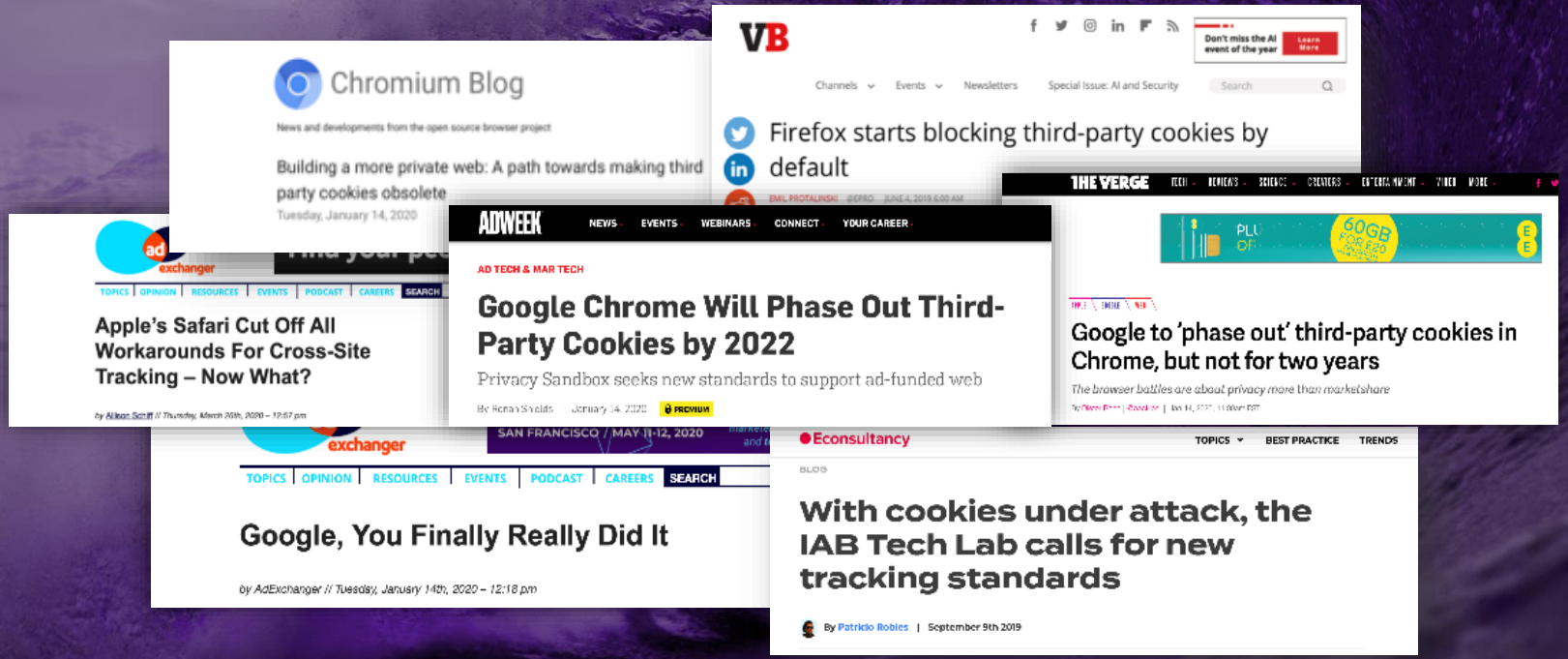
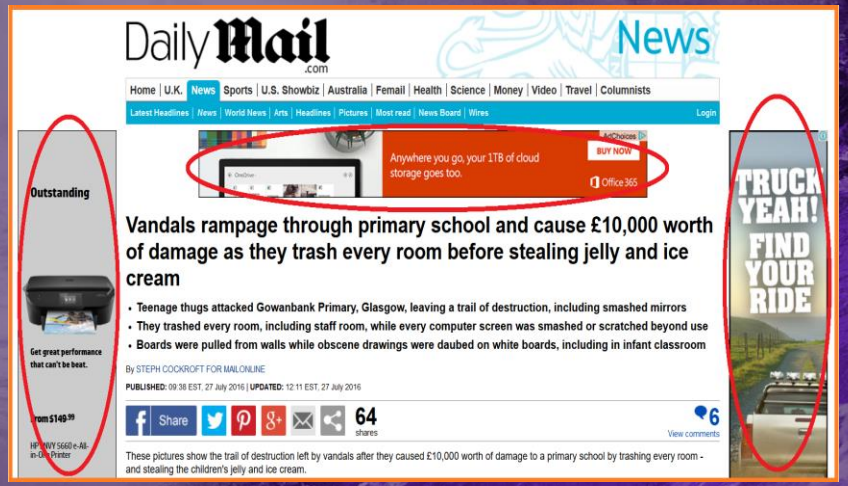

MINDSHARE
ADDRESSABLE AUDIENCES IN A COOKIE-LESS WORLD

ADVERTISING TECHNOLOGY IS BEING RADICALLY ALTERED



SO …… REMIND ME……..



WHY DO WEBSITES NEED ADS?

WHAT HAVE COOKIES GOT DO ANYTHING?

JUST GET RID OF IT ALREADY!!!!

COOKIES DRIVE THE INTERNET'S IMPLICIT VALUE EXCHANGE

CONSUMERS GET FREE CONTENT IN EXCHANGE FOR MONEY PUBLISHERS MAKE FROM AD-SALES.

THE UNDERLYING VALUE EXCHANGE IS A CONSUMERS INFORMATION (IN THE COOKIE) IN RETURN FOR FREE CONTENT ON THE WEBSITE.

AD MONETISATION IS AIDED BY COOKIES WHICH HELP CONNECT THE RIGHT PERSON TO THE RIGHT MESSAGE AT THE RIGHT TIME.

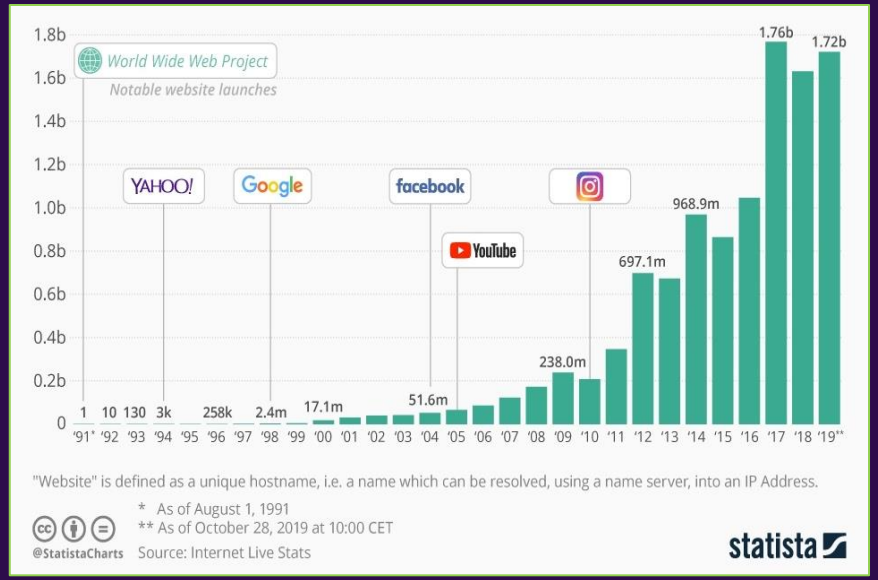
THE INDUSTRY MISUSED COOKIES TO FURTHER THEIR COMMERCIAL GAOLS AT THE EXPENSE OF CONSUMER PRIVACY.

SO EVERYONE HATES COOKIES!!!! AND IS LOOKING FOR ALTERNATE ANSWERS.

BUT WHY CAN’T IT BE DONE IN ANY OTHER WAY?

IT’S DOWN TO THE SALES ARCHITECTURE OF THE DIGITAL PUBLISHING WORLD

TRADITIONAL MEDIA WAS DRIVEN BY RESERVED BOOKING SYSTEMS- FINITE SELLERS SELLING TO FINITE BUYERS NEGOTIATING EACH CASE ON IT’S OWN MERIT



YOU CAN’T SELL 1.72BN WEBSITES USING A RESREVED BOOKING MODEL. IT’S INFINITE PAGES SELLING TO INFINITE BUYERS WITH NO ABILITY TO AGREE ON PRICE ON EACH TRANSACTION.

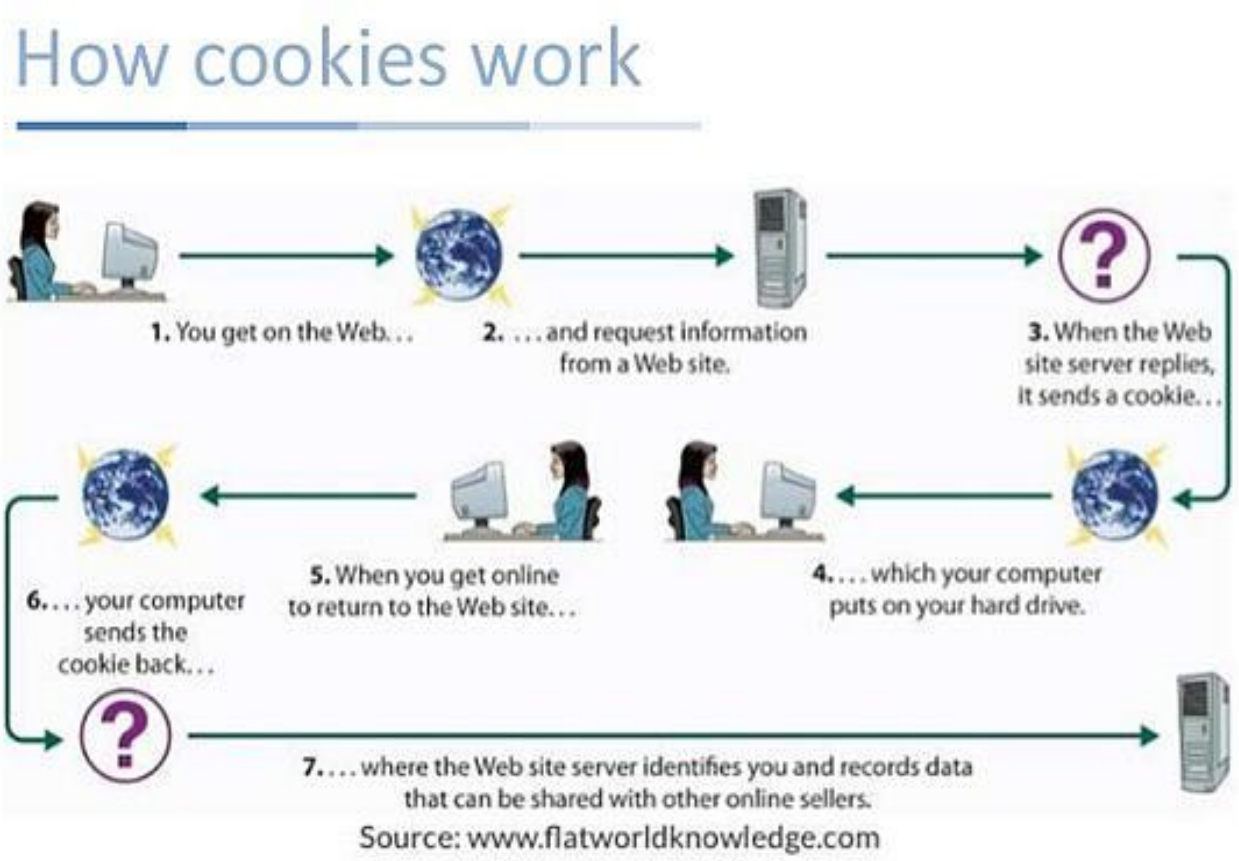
YOU NEED AN AUTOMATED SELLER-MEET-BUYER ARCHITECTURE

DRIVEN BY A NON-HUMAN PRICE DETREMINATION LAYER

……HENCE AUCTIONS

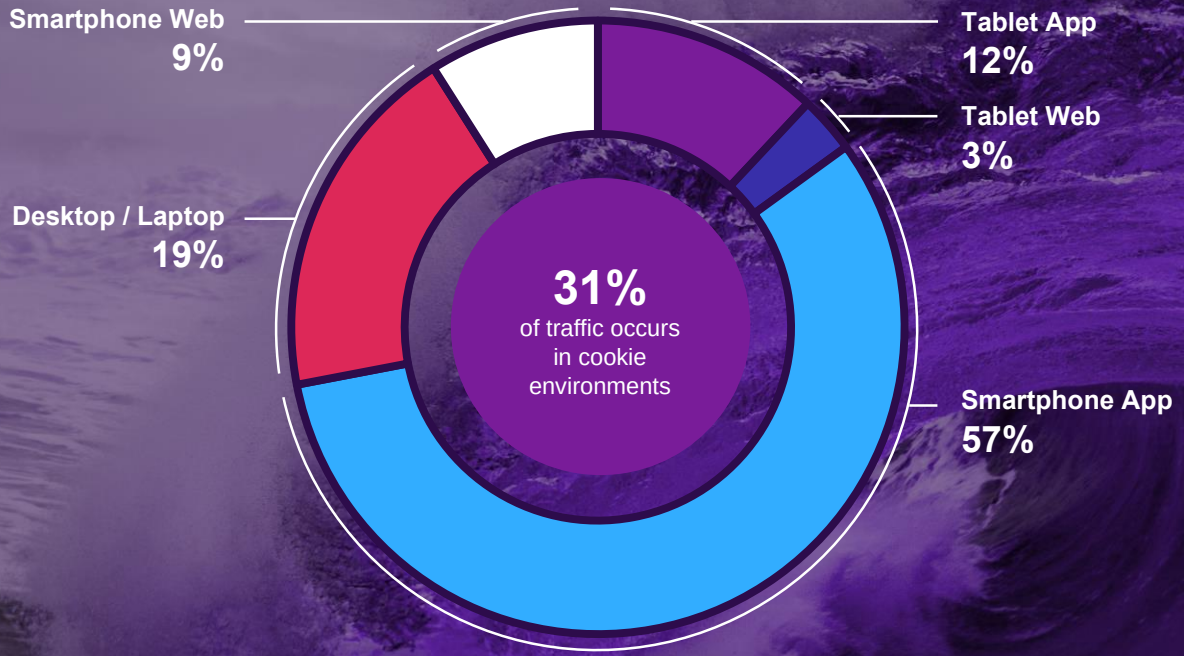
COOKIES PLAY A HUGE ROLE IN THE MATCHMAKING PROCESS BETWEEN THE PUBLISHER AND THE ADVERTISER

BUT THE PROBLEMS ALSO COME FROM THE PERMISSIONS LINKED TO SHARING THE CONSUMERS PREFERENCE AND BEAHVIOUR DATA



THE IMPACT

Share of Time Spent online among internet users by device/channel, Q4' 2019



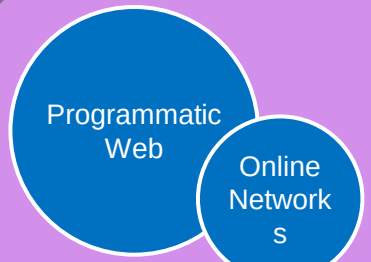
31% of digital investments predicted to be effected.

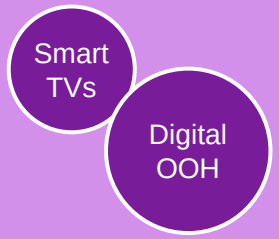
Not just cookies- device IDs and IP addresses also expected to be unusable due to emerging privacy regulations.

This could easily be 50%!

SO LET'S UNDERSTAND WHAT'S AFFECTED

INFERRED DATA AFFECTED MORE THAN DECLARED DATA





INFERRED / PROBABILISTIC

Passive signals generated by the connections, devices, applications and content that consumers access and use.

- COOKIE ID
- DEVICE ID (MAD ID) & CTV ID
- IP ADDRESSES, LOCATION

DECLARED / AUTHENTICATED

Identifiers created and controlled by consumers such as be email addresses or phone numbers, or accounts for specific services.

- EMAIL ADDRESS
- PHONE NUMBERS
- ACCOUNT ID
- SINGLE SIGN-ON

THE UNDERLYING DEBATE IS “DO I NEED TO TRACK TO DELIVER”?

SHOULD WE ALLOW CONSUMERS TO BE TRACKED?

DO ADVERTISERS NEED SO MUCH INTELLIGENCE?

WILL IT AFFECT ADDERSSABILITY? THE ABILITY TO SHOW A CONSUMER AN AD?

WHAT DO ADVERTISERS STAND TO LOSE

IF NOT PREPARED?

CLIENTS WILL LOSE A LOT IF NOT PREPARED

Media

- Frequency & Reach
- 3rd Party Audience Marketplaces
- RTB Technology
- DMP's

Analytics

- View Through Conversions
- App Analytics
- MTA

Insights

- Rich people based insights

Experience

- On-site personalisation
- CMS
- Call Centre personalisation
- CRM

WHAT ABOUT TARGETING?

WHAT WE BELIEVE IT WILL LOOK LIKE

AUDIENCE BASED TARGETING

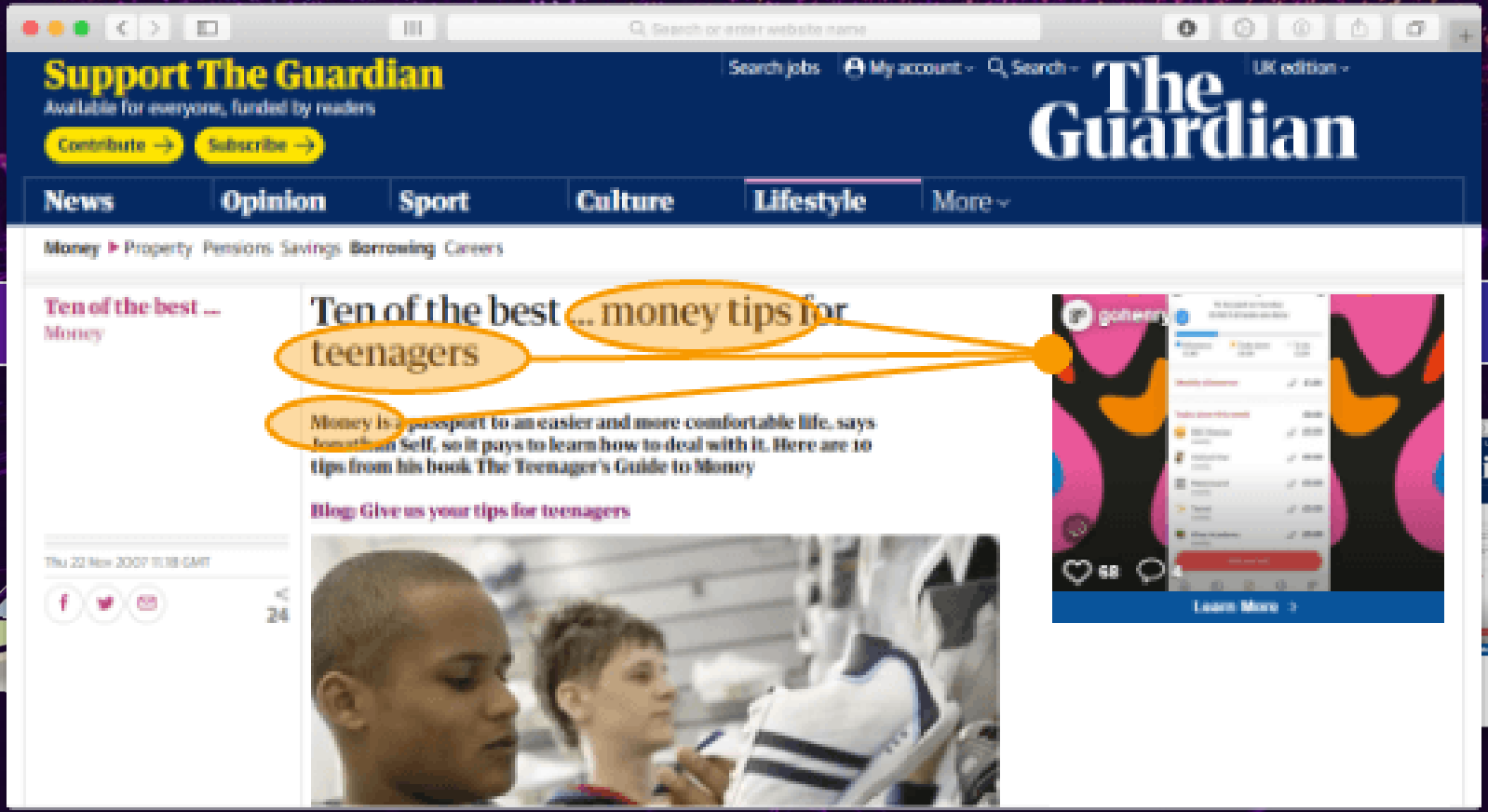
CONTEXTUAL BASED TARGETING

Geo Location

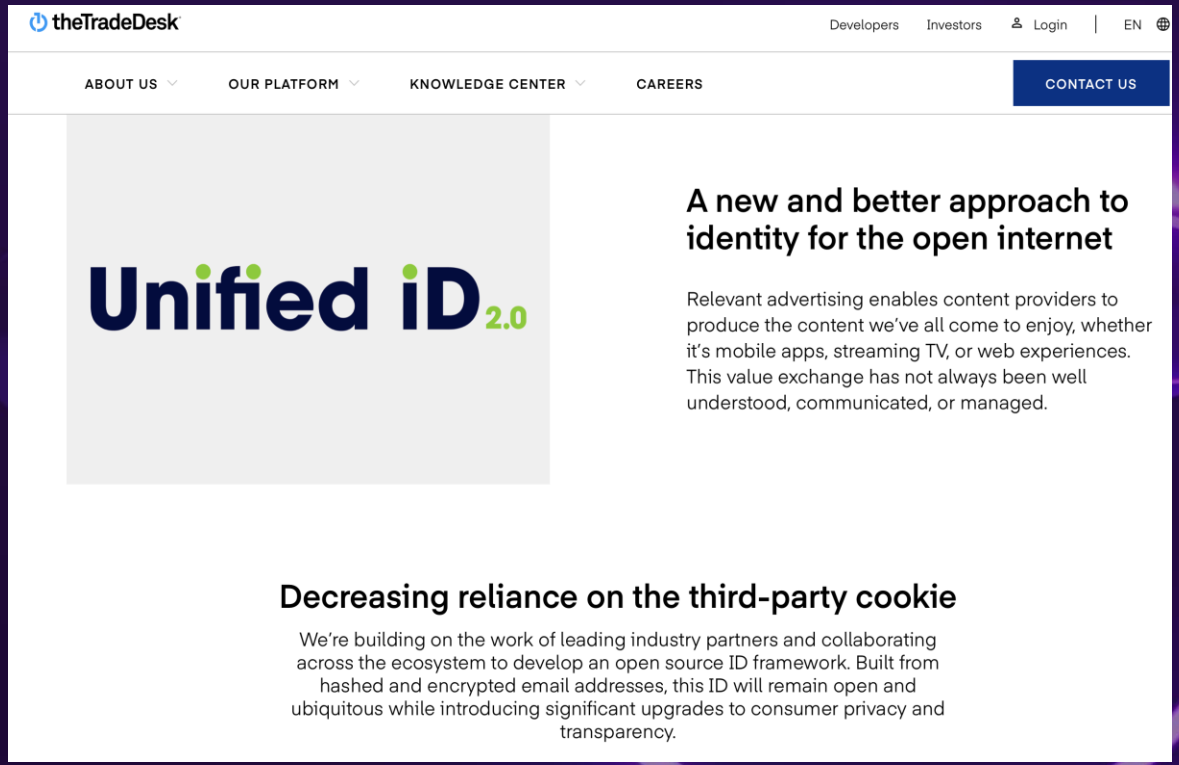
Cohorts

Contextual

WHAT WE BELIEVE IT WILL LOOK LIKE



WHAT IS THE MARKET DOING?



1 UNIVERSAL IDS SINGLE-SPINE MODEL

- A handful of companies hold central identity graphs powered by consumers deterministic data and use them to transact with data

- Allows RTB to continue functioning unchanged – e.g. carrying user profile information – but carries data protection and privacy risks and user's data continues to be shared.

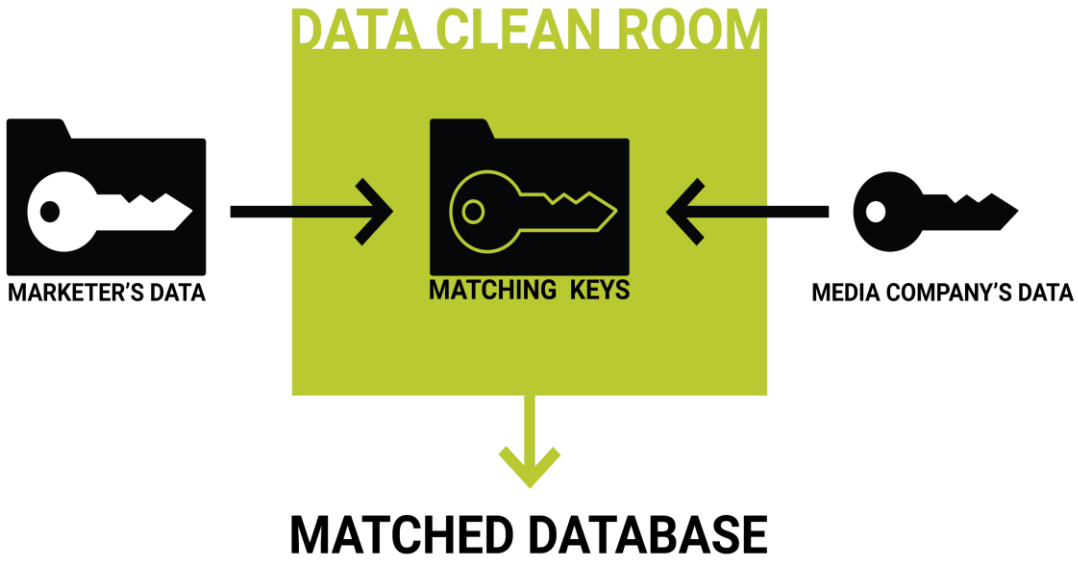
Google's Message To The Ad Industry: We Won't Build Our Own Third-Party Cookie Alternatives (And We Don't Want You To Either)

by Allison Schiff // Wednesday, March 3rd, 2021 – 1:06 pm

Share:

THE PROGRAMMATIC MARKETER

'They won't enable our identifier': Identity tech providers try to make sense of Google's plan not to support alternate identifiers



2 DISTRIBUTED IDENTITY MODEL

- Every company owns their consumer identity data and uses clean rooms to make it available to partners without ever sharing raw user data

- Better quality data and better inventory. RTB becomes very simplified with much more direct connection between buyers and sellers.

GOOGLE, FB, AMAZON, APPLE ALL ON THE SAME PATH

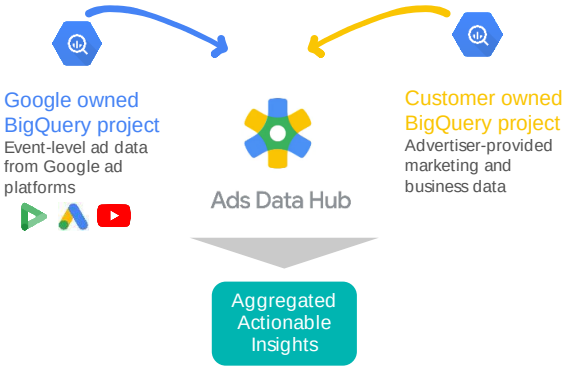
Facebook "clean room"?

Facebook is reportedly building its clean room solution, which might rely on a combination of first-party pixel, a server-to-server Conversions API and powerful insights derived from Facebook Analytics

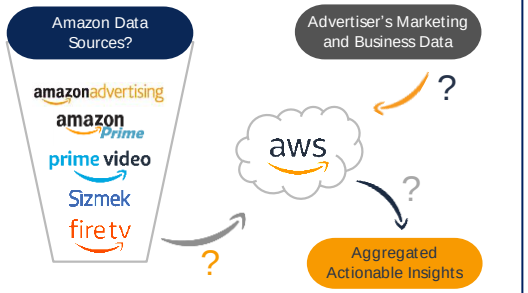
Facebook "Conversions API"

GOOGLE MARKETING PLATFORM: ADS DATA HUB

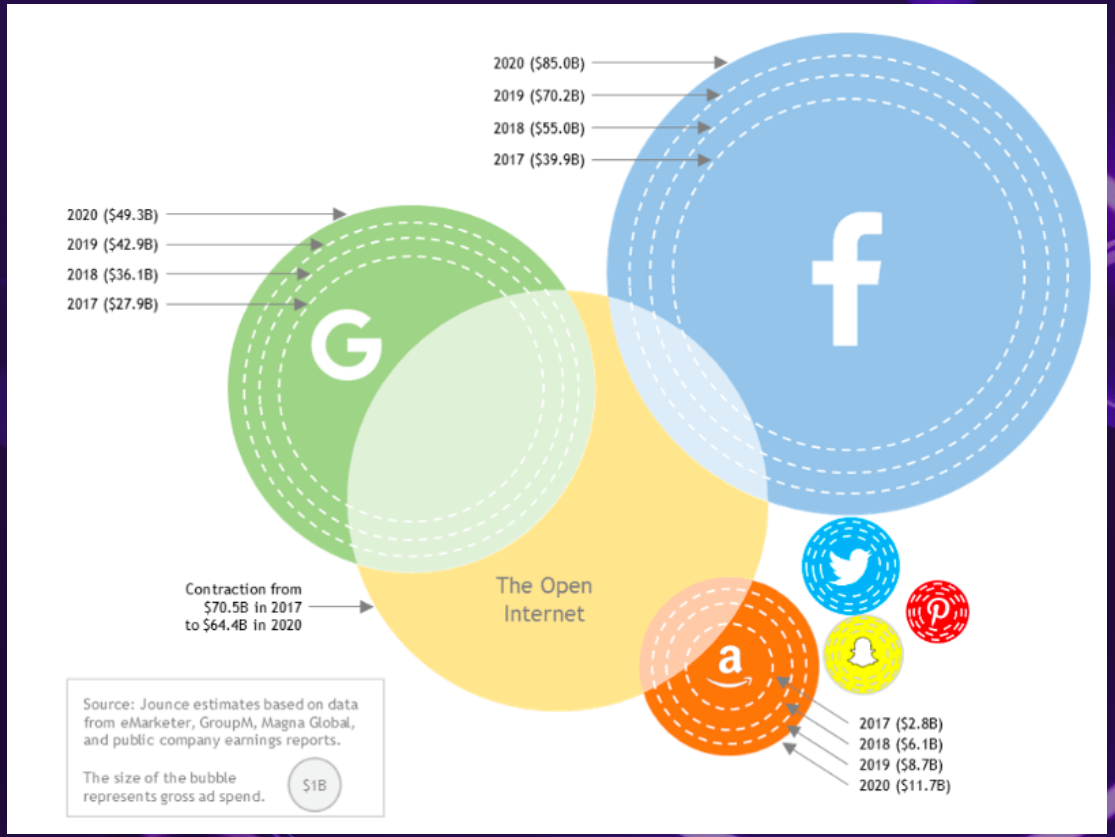
Following the redaction of the DoubleClick User IDs and the decline of log-level data, Ads Data Hub offers a privacy-compliant data clean room that Google's clients can use for its audience segmentation, attribution, measurement and modelling capabilities within the Google Marketing Platform.



Amazon "clean room"?



*Caution! This is purely speculative. No details have been released as of yet about Amazon "clean room" proposition



3 WALLED GARDEN IDENTITY MODEL

- Walled gardens control user identity on the Internet. All inventory becomes part of google display network, amazon display network, and similar solutions.

- Decreased revenues for media owners with many outlets ceasing to exist due to lack of funding. Less competitive, less healthy marketplace.

4 BROWSER PRIVACY SANBOX

The Privacy Sandbox project's mission is to "Create a thriving web ecosystem that is respectful of users and private by default."

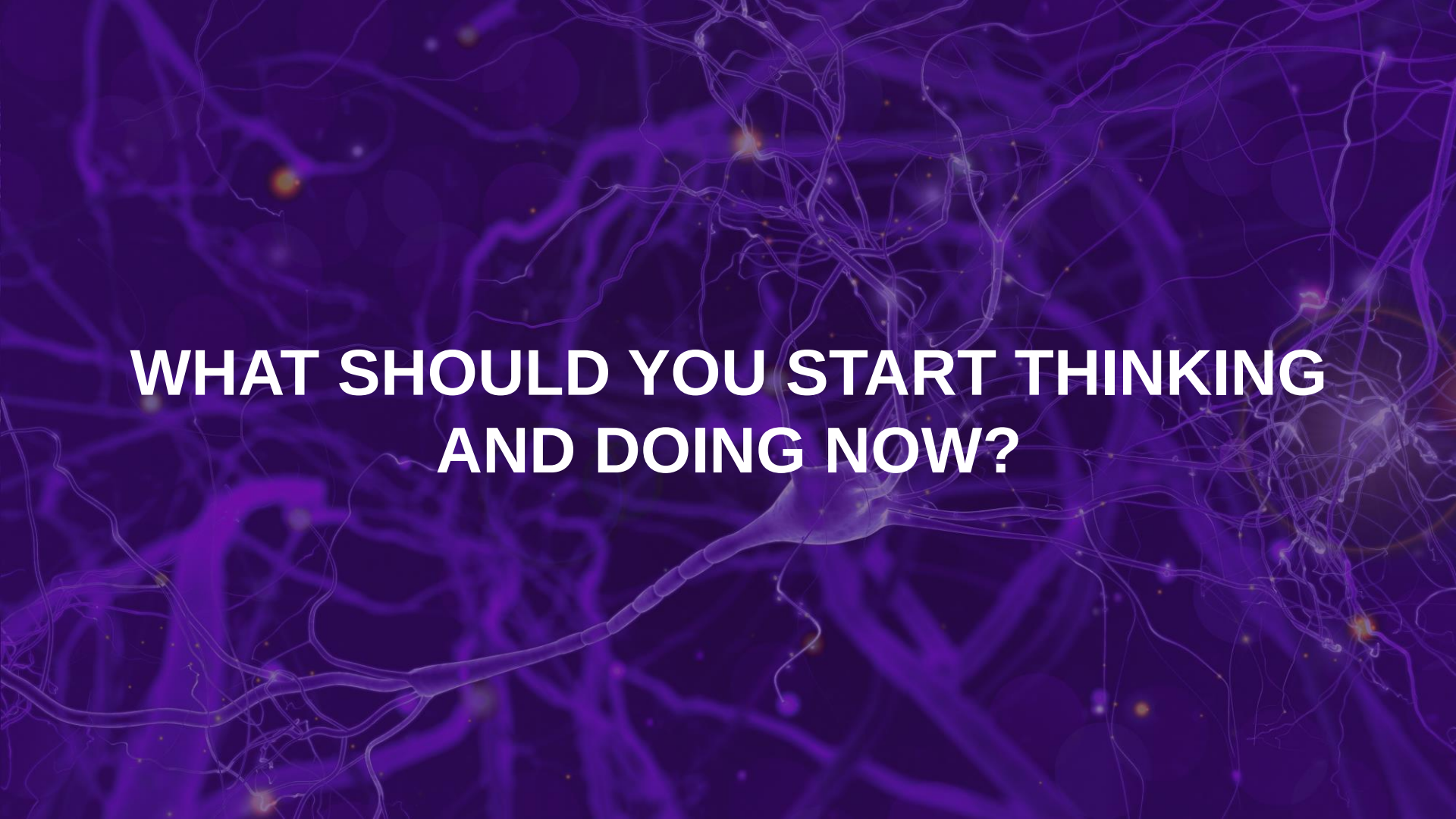
The main challenge to overcome in that mission is the pervasive cross-site tracking that has become the norm on the web and on top of which much of the web's ability to deliver and monetize content has been built.

Google on Wednesday published to GitHub results of experiments it has been running to test how Chrome's Federated Learning of Cohorts (FLoC) proposal could work in practice.

The Federated Learning of Cohorts (FLoC) is a privacy-focused solution intent on delivering relevant ads "by clustering large groups of people with similar interests". Accounts are anonymised, grouped into interests, and more importantly, user information is processed on-device rather than broadcast across the web.

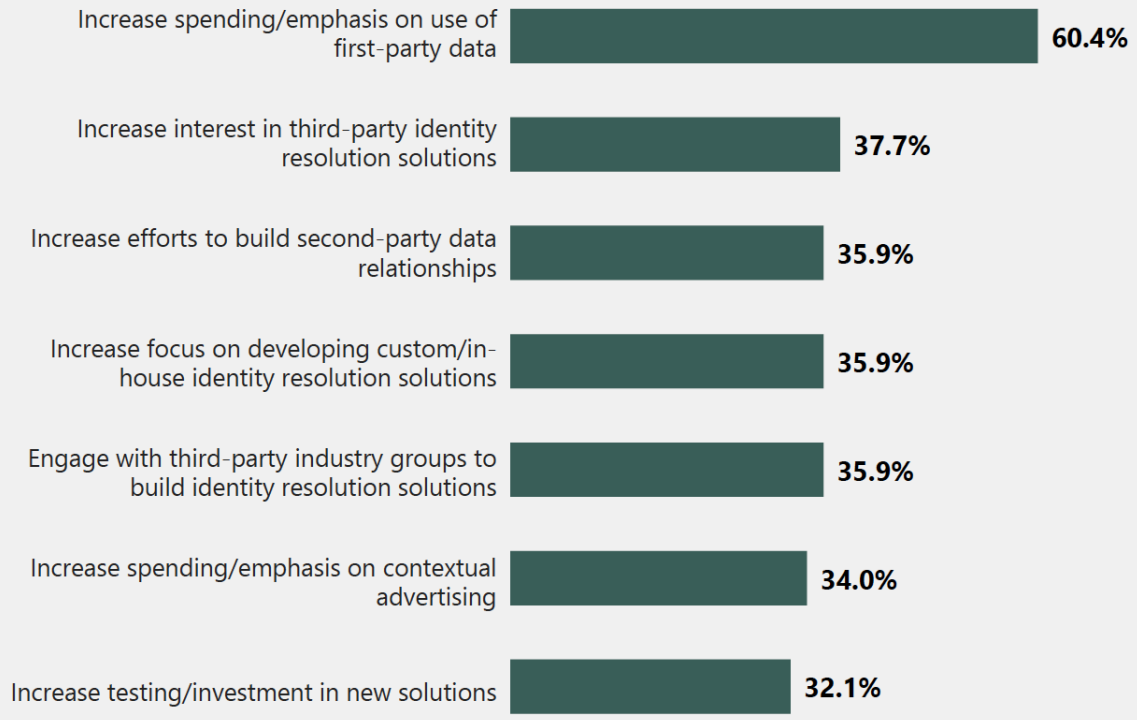
- Browsers and devices use federated learning to assign users to interest cohorts and contextual audiences without ever sharing user level IDs

- Increased difficulty in targeting, measurement and analytics, last of transparency on what goes on in the user browser. Less competitive, less healthy marketplace.


WHAT SHOULD YOU START THINKING
AND DOING NOW?

Year of First-Party Data

"Google and other major browser developers have discontinued support for third-party audience cookies (or announced plans to do so). How do you expect this change will affect your use of data?"



Note: Only highest-scoring question responses are shown

iab. PROGRAMMATIC+ DATA CENTER

THIS IS A GOOD DIRECTIONAL SUMMARY OF WHAT YOU SHOULD BE LOOKING AT AS AN ADVERTISER

STREAMLINE AND ACCELERATE STEPS

Media

3

Test the impact of no 3rd party data usage, replace DMP with Identity Graph

Identify Publisher Partner ID integrations

Analytics

4

Reset KPIs and adjust to the reduction in attribution

Insights

5

Consider/Reconsider Panel and Survey partners and Integrations

Experience

2

Data by Design: Accelerate 1st Party Data Acquisition

1

Establish an Identity Partner


MINDSHARE
THANK YOU!