

2023 Identity & Cookieless Survey Results

A study checking the temperature on marketer perceptions and readiness for the upcoming Google cookie deprecation along with feedback on identity and audience solutions



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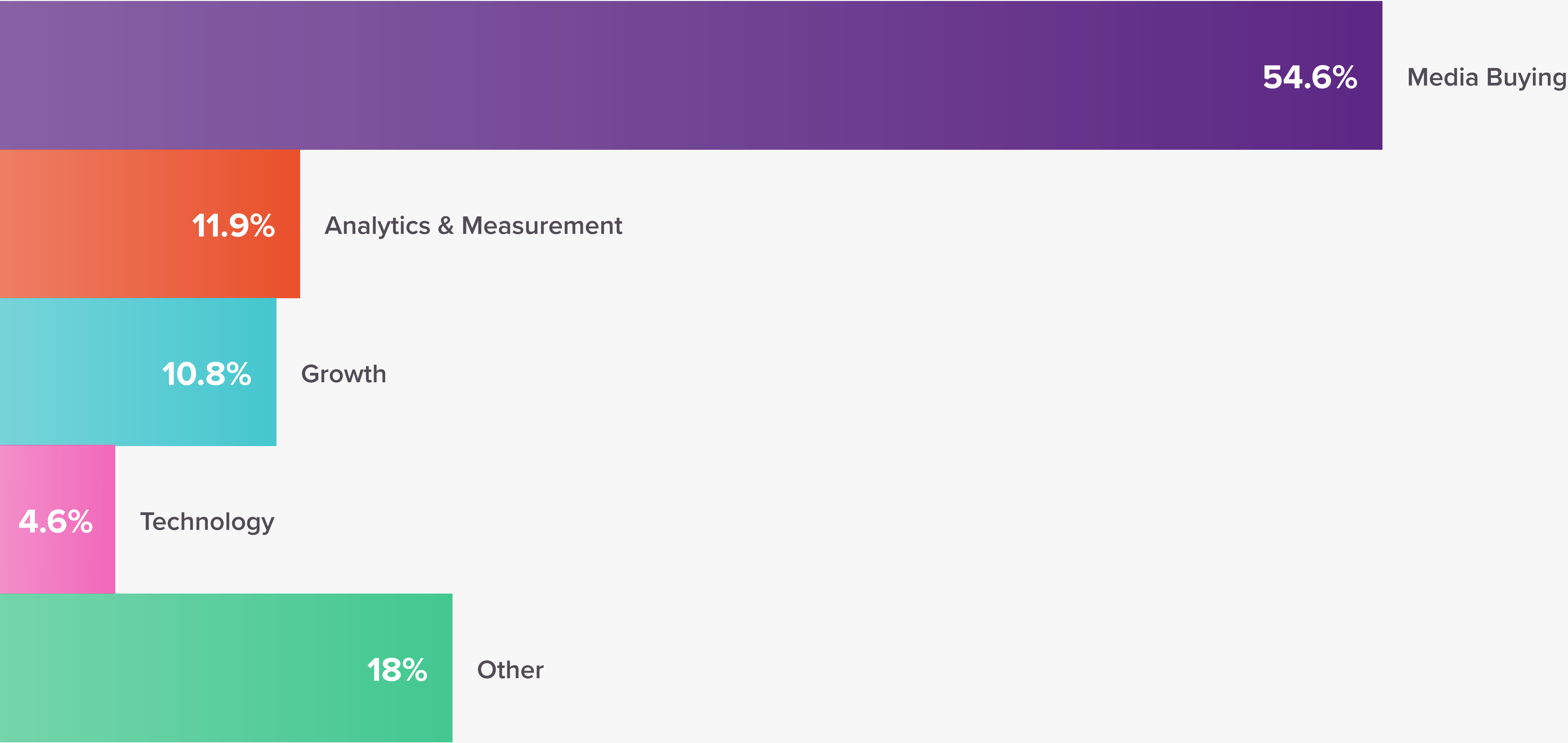
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Overview & Methodology

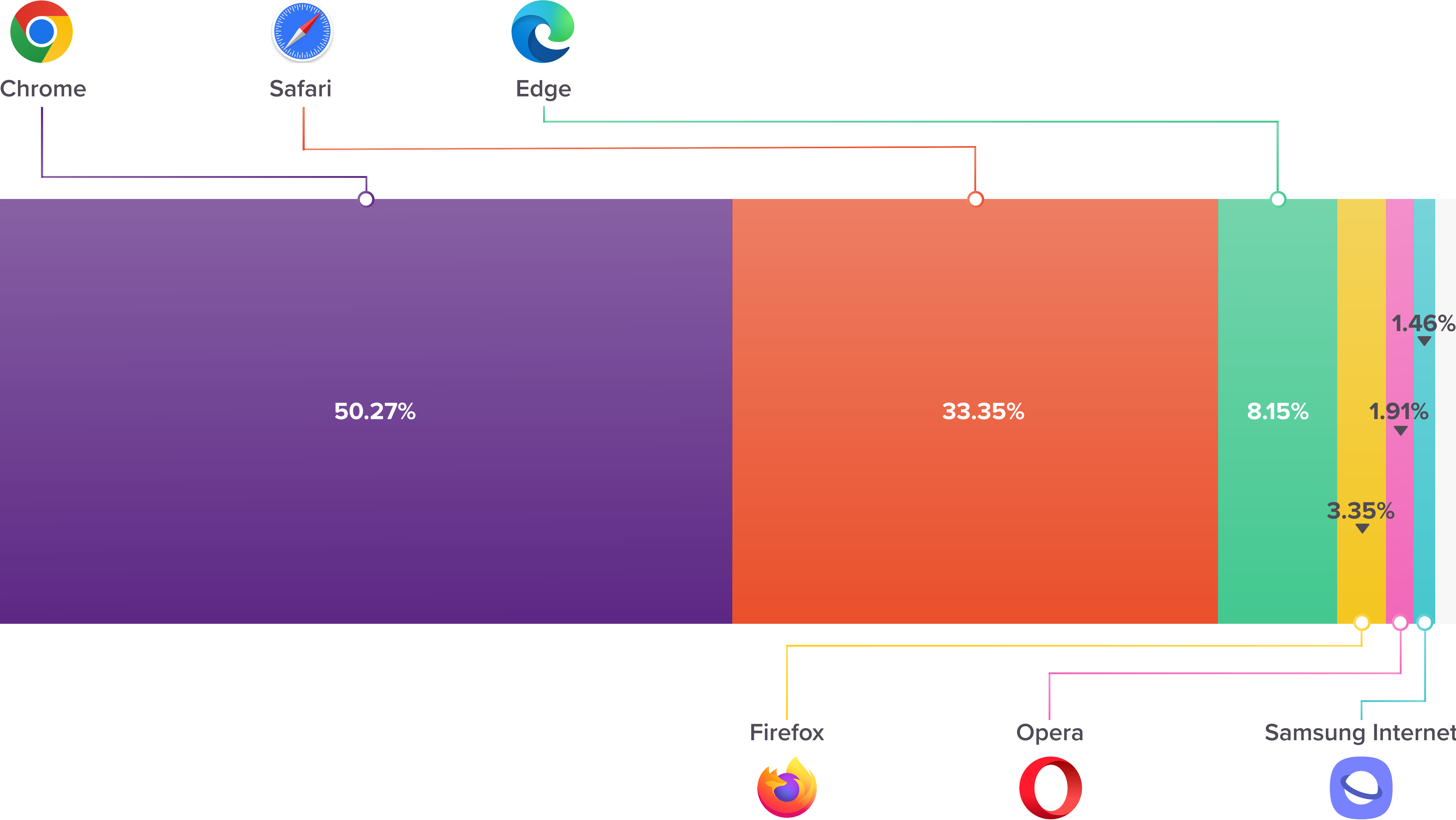
In May 2023, Datonics conducted a survey with 194 brand and agency marketers working across various functions in adtech. Our goal was to better understand the level of importance and urgency they felt around both the present cookieless challenges with the Safari browser as well as the looming challenges with the Chrome browser. Additionally, we were curious to find out the perception of solutions available around identity, audience data and enrichment.

Which of the following best describes your role?



Safari - A Preview Of Chrome's Cookie Deprecation

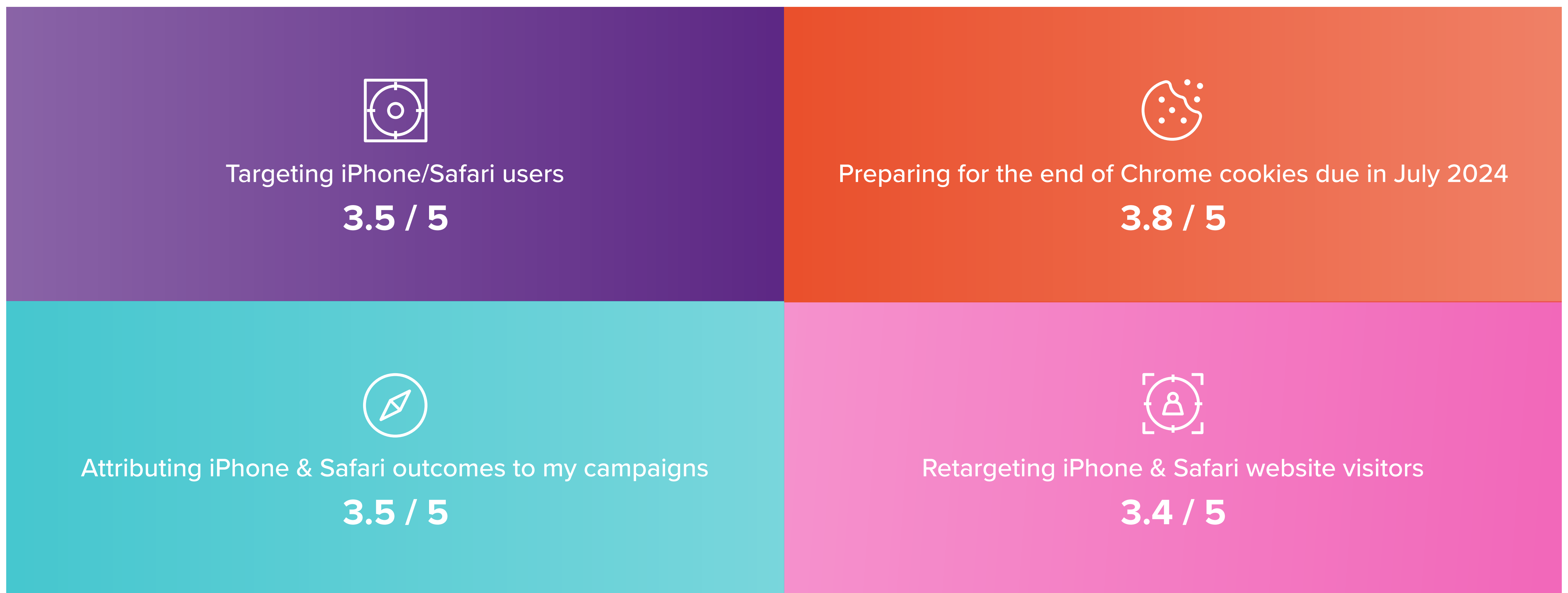
While Google's impending removal of the cookie from their browser has been one of the biggest topics in adtech for the past few years, the industry has been facing identity deprecation issues for some time. Apple's Safari browser which currently holds a 33% market share has presented targeting and attribution headaches for marketers ever since they removed the third party cookie.



Safari - A Preview Of Chrome's Cookie Deprecation

To anticipate the challenges that marketers will face when the buzzer sounds on the Chrome deadline, we asked our respondents to rank the importance of these challenges, an answer of 1 indicating not important at all and an answer of 5 indicating very important.

On Safari & cookieless: How concerned are you about the following industry challenges?



The average response to all of these questions fall between medium to great importance. The challenges with targeting and attributing Safari users affect one third of the browser world today and the industry recognizes that we will be on course for a full disruption once Chrome's cookie removal is added to the fold.

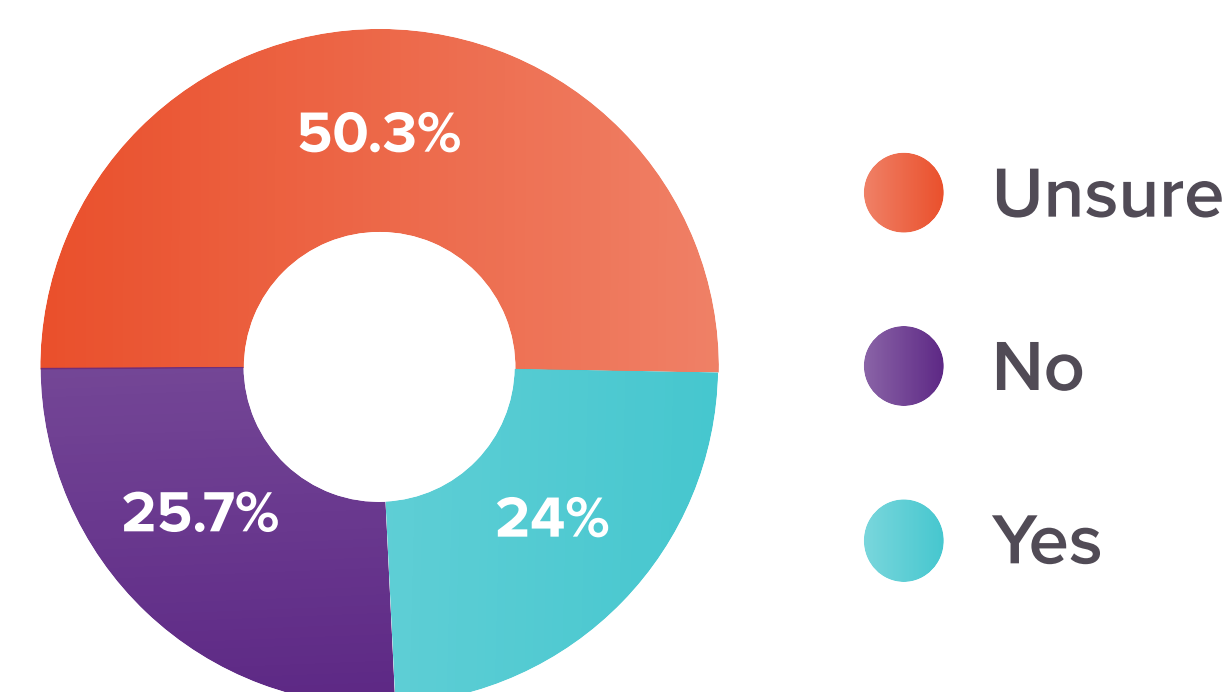
Safari - A Preview Of Chrome's Cookie Deprecation

On Safari & cookieless: How do you activate audiences in Safari environments today?

Contextual targeting was listed as the number one option for audience targeting within Safari Environments.



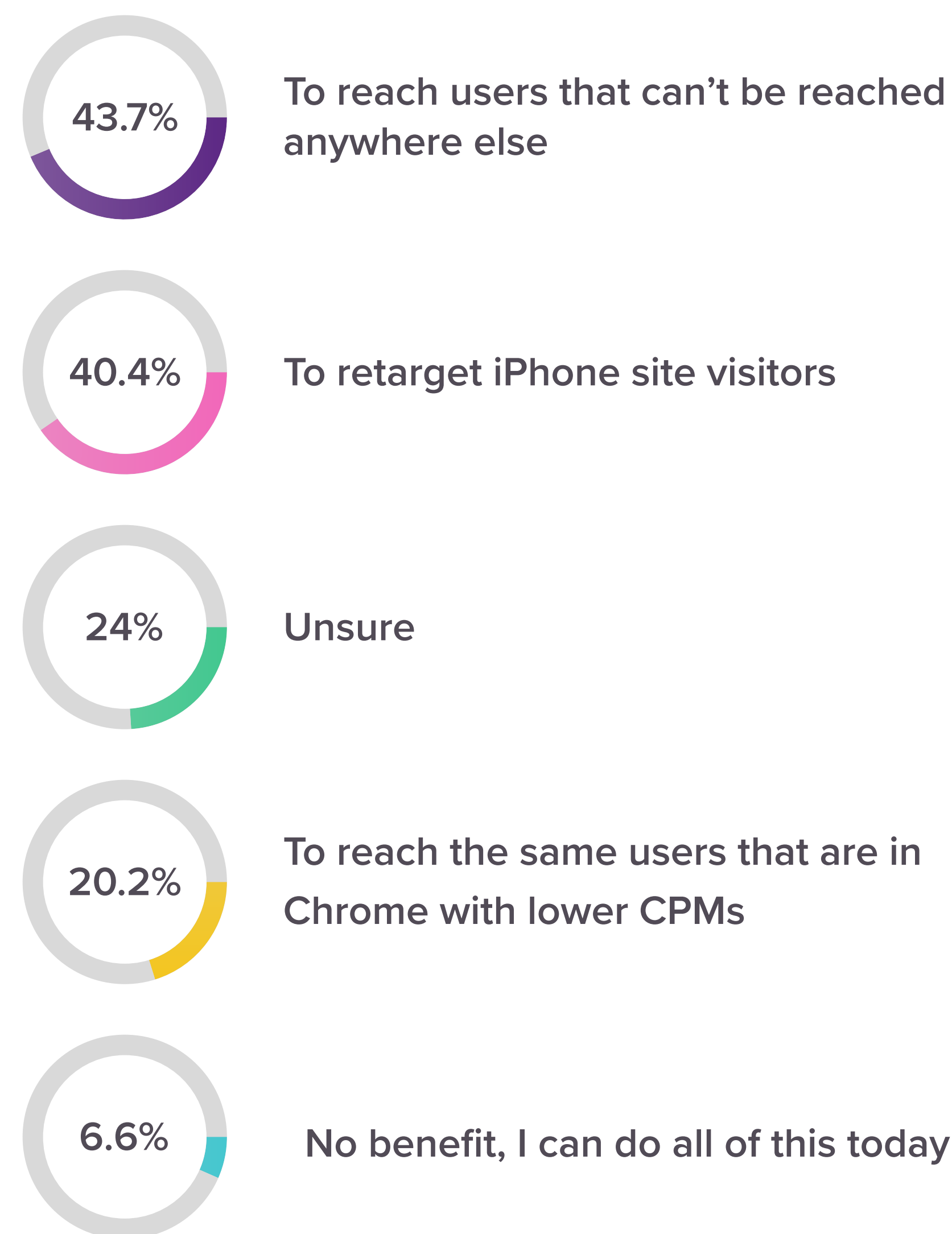
On Safari & cookieless: Has your company developed a plan to reach iPhone and other cookieless users?



More than three quarters of our respondents indicated their company has not developed a plan or clearly communicated to them the plan on reaching iPhone and other cookieless users. It appears that many organizations are willing to deal with this challenge when the deadline arrives.

On Safari & cookieless: How do you activate audiences in Safari environments today?

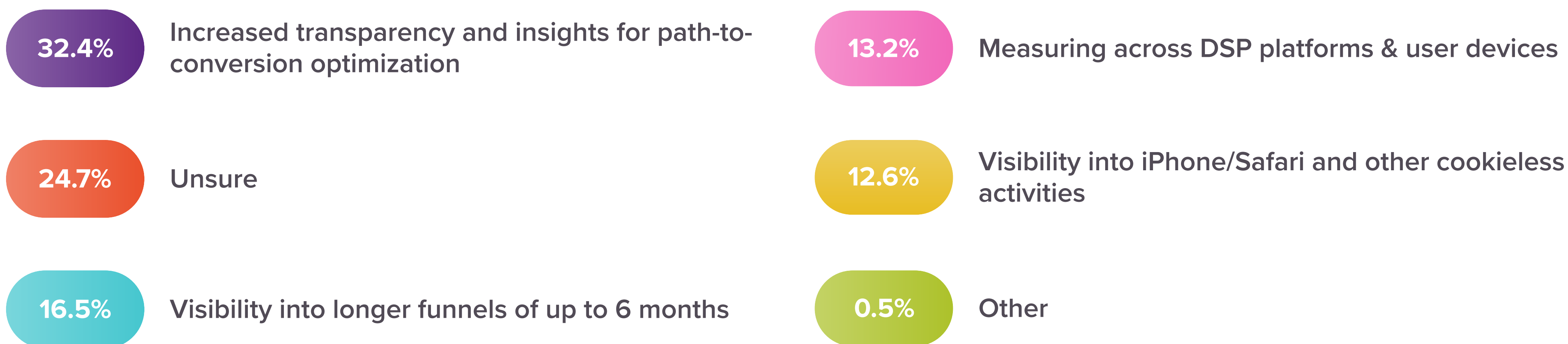
Apple has extremely loyal customers and they have a monopoly on the browser behavior for a significant portion of the population who utilize an exclusive combination of Mac devices, iPhones and iPads. This appears to be the primary motivator for marketers to find a way to reach these potential customers.



Attribution

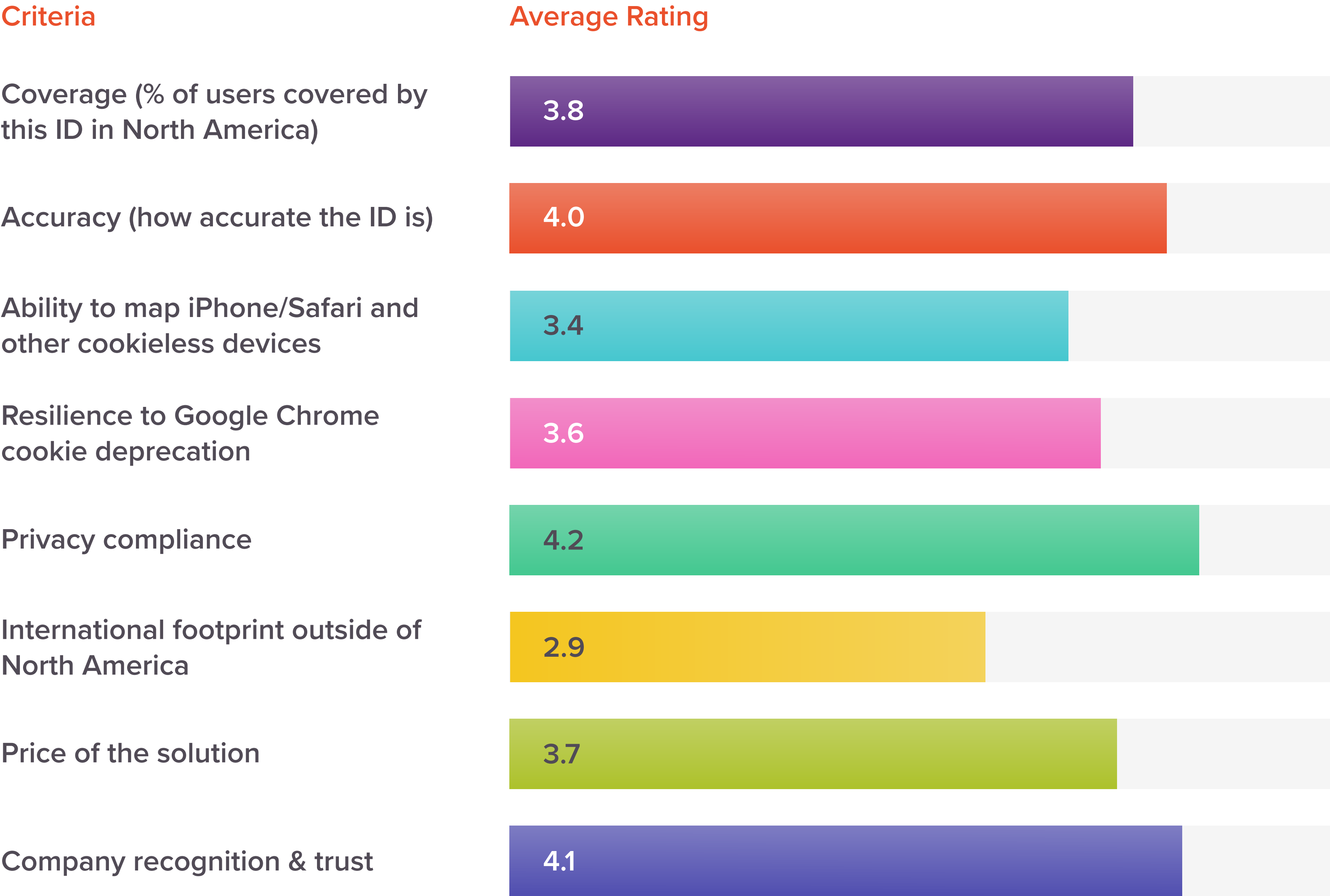
Attribution is one of if not the most critical component of identity solutions for marketers and the wishlist for improvement is broken down as follows.

On measurement: What would you improve in your current attribution solution?

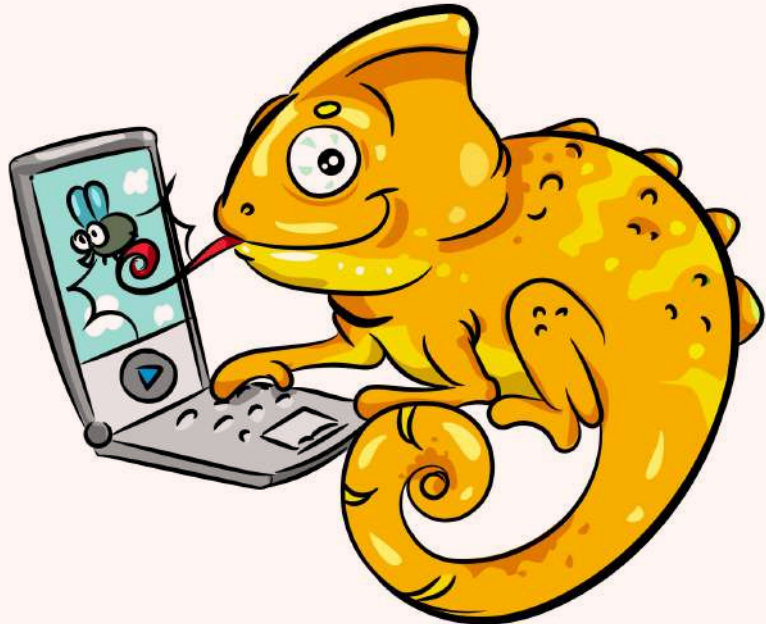


Identity Partner Criteria

We asked our respondents to rate the importance of the following criteria in selecting their identity partner.



In a privacy sensitive environment where a single case of data breach or unauthorized use of customer data makes the headlines, marketers are placing the utmost importance on privacy compliance. This is followed by company recognition and ID accuracy.



An anonymous user browsing different environments will appear as unique individuals to marketers. They are digital chameleons until matched together by an identity graph.

Privacy

To further break down marketers' caution on protecting consumer privacy, we asked them which factor is most concerning to them.

Lack of transparency around data collection and usage



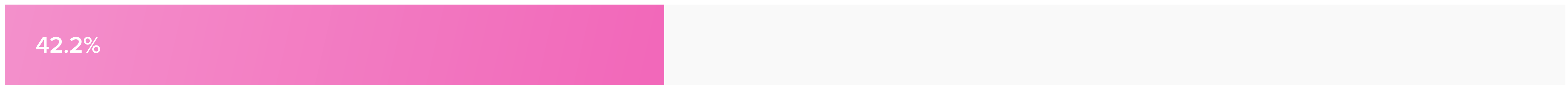
Inaccuracy of enriched data and potential harm to customer relationships



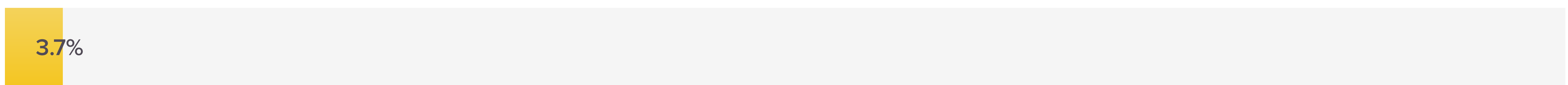
Misuse of customer data



Risk of data exposure when moving it out of a cloud database or uploading it to a third-party enrichment provider



None



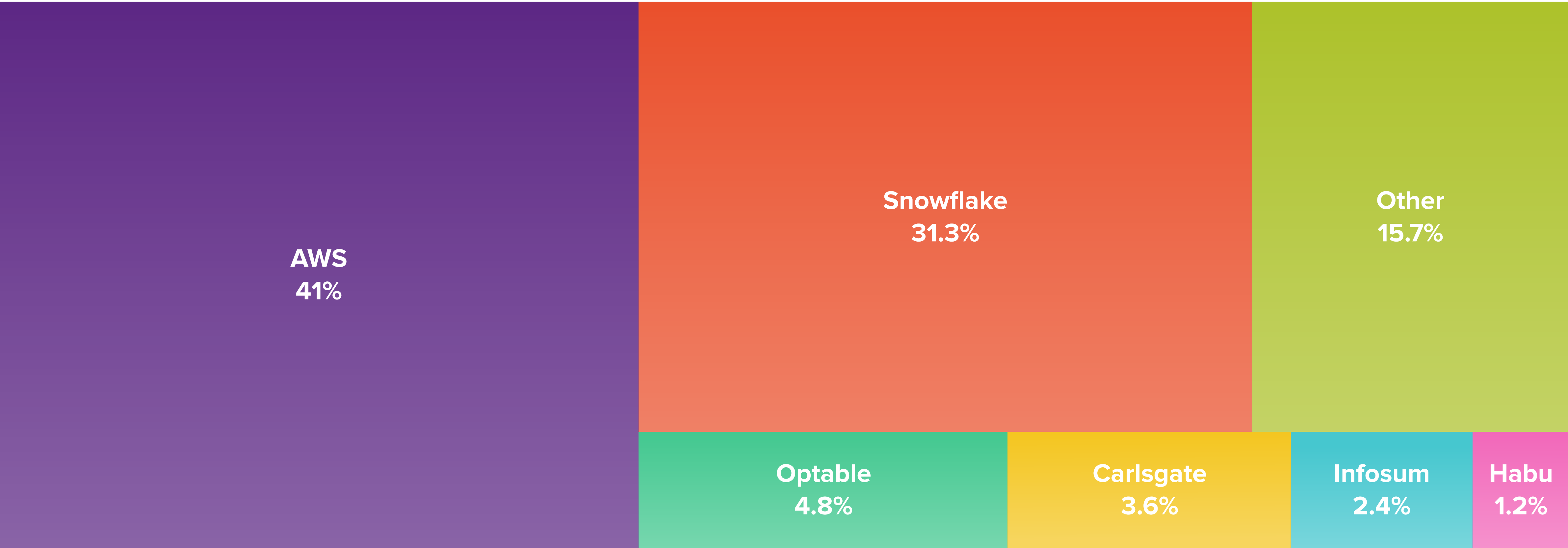
Enrichment

CRM enrichment and clean room adoption have been hot trends in the past several years. Yet, it appears that the majority of respondents were unsure or not using clean rooms to enrich their customer data. The uncertainty could be due to silos within organizations where the enrichment of data is utilized in select department(s). Of those who did use clean rooms, AWS and Snowflake were the most popular options.

On enrichment: Do you use clean rooms to enrich your customer data?

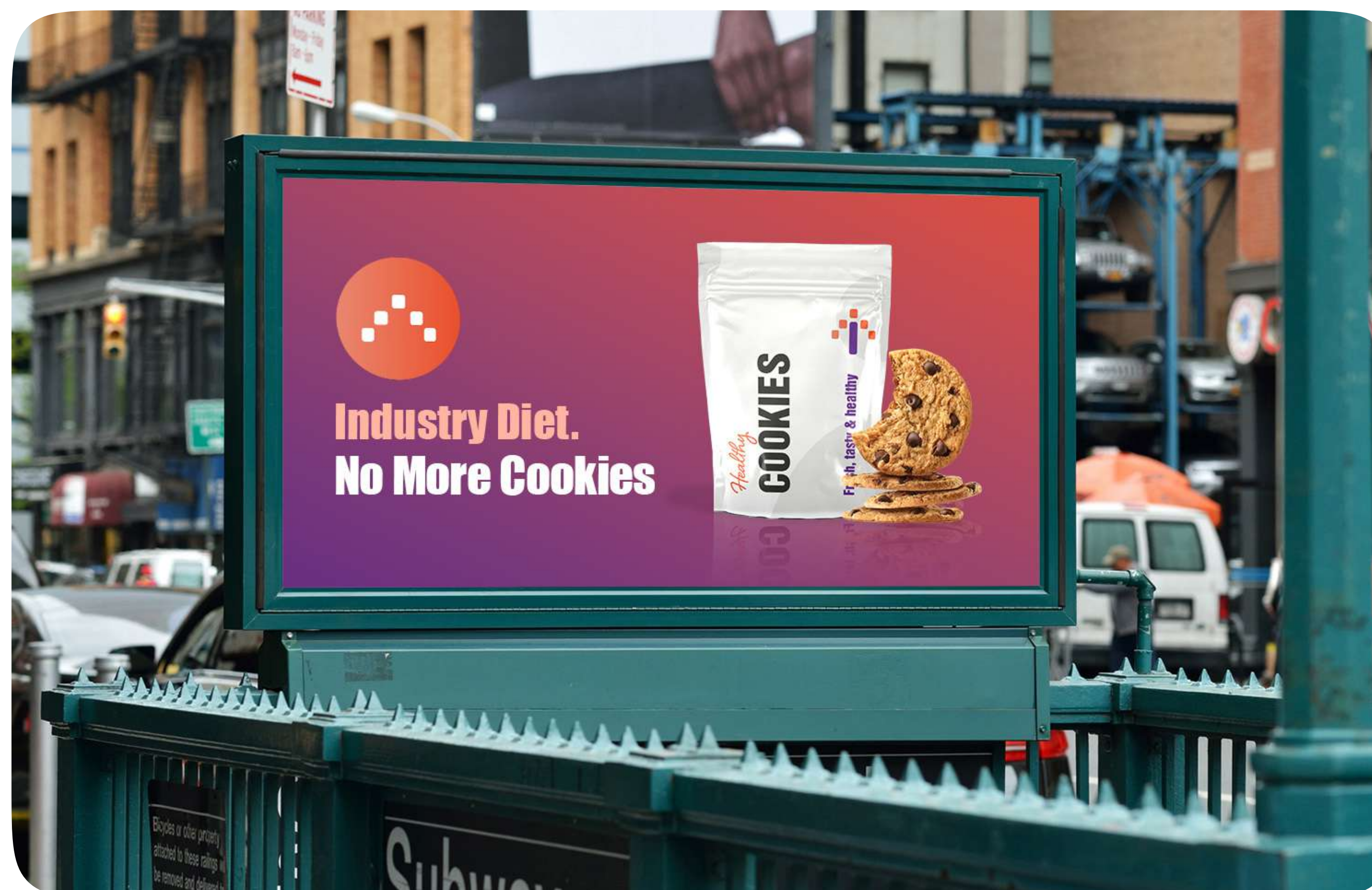


On enrichment: What is your preferred data clean room?



Wrap Up

Google recently announced their intention to sunset the cookie in various stages in 2024. This appears to be the real deadline and our respondents certainly seem concerned but perhaps the multiple false alarms of the past have knocked the importance down just a notch. Marketers understand that third party cookies are on their last act and perhaps the second half of the year will be the period where more demand side partners start testing various solutions.



Datonics is a digital data pioneer that led the distribution of audience interest and intent data into DSPs during the nascent stages of real time bidding. Today, we enable marketers with data solutions for audience targeting, CRM enrichment as well as insights and analytics on 500M+ user profiles in the U.S. and Canada.

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