The Cookieless Conundrum

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The Cookieless Conundrum:
What we know and what we need to do.

“We must prepare for the cookieless future!”

If you’re faced with this mandate and are scrambling on what to do...you are not alone.

Read the results of ENGINE’s recent study focused on how publishers are addressing the emergence of identifiers and alternatives to cookies. If you’re looking to understand what identifiers the market is adopting, how publishers are preparing, how 1st party data is being leveraged in the ecosystem, and the elusive “what’s next” this is a must-read.

The Cookieless Future is Here, but Are We Ready?

98% of publishers plan to support cookieless solutions in 2022

[78% plan to in 2021]

But the current reality is that less than half of publishers have integrated with any 3rd party cookieless solutions providers.
we’re in a period of trial, competition, & fragmentation.

While we’re seeing frontrunners, no clear winner has emerged.

Among those who have integrated with identity providers, nearly half of respondents are currently integrated with IDL, ID5, UID 2.0.

62% Liveramp IDL 58% ID5 42% Unified ID 2.0

There are over a dozen additional identity providers that publishers are integrated with, but all are much less prevalent. This remains a fragmented and undecided market.

When asked which providers publishers plan to be integrated with in the future, UID 2.0 and LiveRamp remain top choices, followed by secondary and emerging providers such as LiveIntent, Merkle and Britepool in addition to ID5.
Publishers look to industry/partnerships for solutions.

Consistent with other ad tech developments, publishers seek vendor/partner solutions rather than build in house and embrace SSP partnerships.

- 78% do not plan to build in house solutions
- 22% plan to build in house, the majority of which seek to partner with SSP partner
  - 57% of premium tier and comScore 100 publishers surveyed plan to build in house solutions
  - Only 7% of mid-tier and long tail pubs plan to DIY

We’re still in the early innings...
First party data is key. And so is consumer participation.

65% of publishers are able to turn first party data into transactable data for SSPs and DSPs.

Of the publishers passing identifiers:

54% are passing email-based identifiers (A variety of non email-based identifiers are reported by small numbers of publishers).

80% of publishers are capturing user information...

31% capture user information during sign up / registration / newsletter sign up / subscription.

22% capture user information during login / membership data.

20% do not capture / collect user information.
The path forward is uncertain.

65% currently have logged in users

However, of the publishers that have logged in users, 44% report that less than 10% of users are currently logged in.

Only 20% of publishers with logged in users have consumers logged in more than 50% of the time.

When asked what publishers expect their logged in user percentage to be in future, the majority of publishers with logged in users expect to have users logged-in 24% or less of the time.

Given the reliance on hashed email addresses as an identifier for many identity solutions, we asked if publishers plan to leverage an email wall.

Only 7% of publishers plan to use an email wall

58% are uncertain about using an email wall

50% of those who are working on other solutions are still undecided.
The Cookieless Conundrum: Where do we go from here?

While this is a critical time for the industry, ENGINE is optimistic the advertising ecosystem will be better with more educated consumers and a longer-term plan for advertising solutions that support the open internet.

We’re still in the early innings and continue to look towards industry solutions including the known email-based solutions, which are innovating to solve for the authentic gap such as:

- UID 2.0’s Open Pass through Prebid
- Lesser known and emerging non-email based solutions SWAN.community
- Google’s replacement for the cookie in Chrome, including Google’s Privacy Sandbox and the other corresponding APIs.

ENGINE Media Exchange (EMX) is built to solve your needs—as an SSP and Data Platform, we’re able to help partners by leveraging first party data, connecting data sets, and streamlining a fragmented marketplace.

As a trading desk on behalf of ENGINE’s clients, we’re able to leverage our own best of breed technologies to deliver results leveraging our ENGINE Device Graph+ cookieless solutions for CTV and Omnichannel media.

Contact us to learn more about how ENGINE Media Exchange (EMX) can help both buyers and sellers prepare for the cookieless future.

Survey Methodology:
ENGINE Insights’ CARAVAN™ conducted a survey of 55 publishers from the EMX publisher network between February 24th, 2021 - April 7th, 2021. Publishers surveyed includes Top Tier Premium and ComScore 100, Mid-tier and Low-tier (networks/aggregators/service providers).