



**IT'S OVER FOR THE
3RD PARTY COOKIE.
WHAT NOW?**



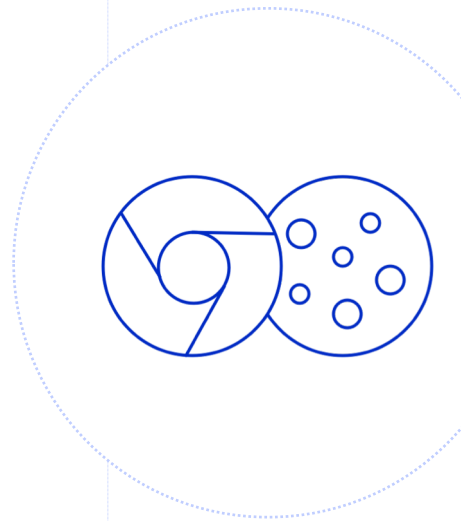
SAYING GOODBYE TO COOKIES

Google dropped a bombshell recently on the advertising industry saying it would **“phase out support” for third-party cookies on Google Chrome by 2022** (effectively killing them). To level-set, first-party cookies help web publishers track users on their own properties, while third-party cookies help advertisers track user activity across their web travels in order to better target them with relevant ads.

The Wall Street Journal and other outlets reported that the Association of National Advertisers and the American Association of Advertising Agencies (4A’s) issued a statement that Google’s decision could hurt digital businesses, consumers and technological innovation. The statement specifically reads, “it would threaten to substantially disrupt much of the infrastructure of today’s Internet **without providing any viable alternative**, and it may choke off the economic oxygen from advertising that startups and emerging companies need to survive.”

Recently, Daniel Heer, our CEO and Founder, wrote another [piece](#) predicting that cookies were not long for this world, a sentiment widely accepted by the industry for some time. Safari and Firefox already allow users to turn off tracking –and Google’s move is another nail in the coffin (especially considering their dominant market share).

SO, WHAT NOW FOR DIGITAL ADVERTISERS?



THE GOOGLE ANSWER – PLAY IN THE SANDBOX

Google has suggested its **Privacy Sandbox** – a set of web standards (web browser APIs)– as a replacement for cookies. The solution is supposed to still give advertisers the **ability to target and measure campaigns while preserving user privacy**. It represents a new way of sharing data over the internet in which an advertiser must call an API to get a certain cohort of users (not an individual user) who have performed a specific action.

This process addresses the privacy problem, but it will also severely **limit the ability to offer customization** to a user or the 1:1 experience so many of us have come to expect from our favorite brands.

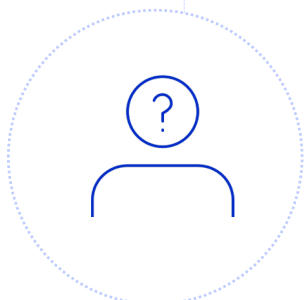
That’s what everyone is worried about, but the good news is that **Google is asking for feedback from the ecosystem** – and all invested parties should make sure they’re part of the conversation. As per Google, industry feedback is being solicited on the web standards community proposals via GitHub.



THE COOKIE-LESS FUTURE

Digital identity – or cross-channel and cross-device identity graphs – **is critical to the future of advertising**. As discussed in my previous article, **MAIDs (mobile AdIDs) are inherently mobile-based and more sustainable and efficient identifiers than cookies** – and will take center stage as the cookie-less world approaches. The industry now has more reason to improve on known in-app mobile challenges to drive more demand towards it - considering that 90% of a user’s time on their smartphones/tablets is spent in apps (vs. 10% on web browsing).

Historically, the migration of marketing spend from web to in-app advertising hasn’t kept pace with the amount of time users spend in apps. This disconnect has mainly been due to viewability issues, brand safety concerns, and the fact that audience ratings vendors have been slow to pay attention to the app space. Google’s announcement should help catalyze the industry to improve on these issues and finally drive the deserved demand to in-app advertising.

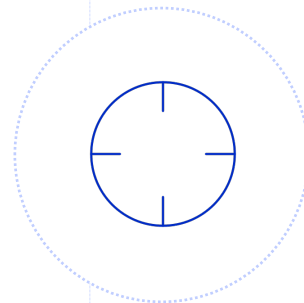


FIRST PARTY OFFLINE DATA WILL BE A GOLDMINE

Brands will always have the need to identify their customers in their CRM database through hashed email/phone numbers with a digital identifier (ideally, mobile AdIDs, smart TV IDs and other digital device identifiers). Therefore, identity linkages that originate from more permanent CRM data will still be a viable solution for advertisers.

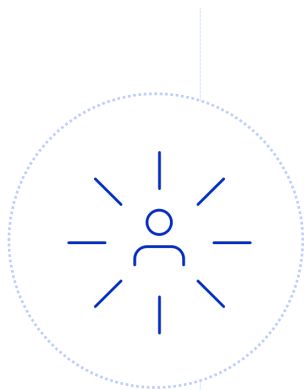
There is no doubt that brands will hold tight their offline first-party data as the cookie-less future becomes a reality. Why? Simply because **emails and phone numbers will still be the most permanent identifiers that brands can rely on for digital re-identification**. They become extremely important when planning acquisition strategies to suppress current customers, as well as for churn prevention and cross/upselling strategies to only target current customers.

Therefore, brands will continue to have the need to identify their CRM customers while executing their online marketing strategies. This will not be affected by the Google position. **Brands will be scaling their efforts to gather as many emails as possible to build up their first-party data based on permanent identifiers.**



THE UNIVERSAL ID - A SHIFT FOR VENDORS LOOKING TO SURVIVE

Some technology platforms that currently rely on cookies to resolve identity are already producing their universal, agnostic ID solutions to **bypass the upcoming Google restrictions**.



A real universal ID used by every single player in the industry would provide the underlying plumbing for the marketing ecosystem in an ideal world. However, it's an ambitious goal for any company undertaking this path as it requires massive industry alignments as well as complex technology integrations across the ecosystem.

The race has already started so **vendors only have two years remaining to develop their universal ID solution**, win enough partners to become relevant in scale and a feasible industry alternative (in fact selective Customer Intelligence platforms have started establishing such IDs.)

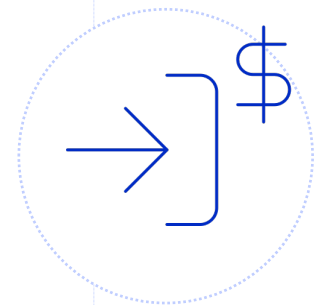
Publishers will have an incentive to work with a couple of universal ID suppliers to not make themselves too dependent on any one provider.

PAYWALLS AND LOGINS – EXPECT MORE

It's been a **growing trend for web publishers to start charging for content** – this may start to increase and, at the very least, we can expect more publishers to require logins to access their content (in order **to capture valuable first-party data** such as phone and email).

This will enable any identity resolution provider to deliver enrichment and activation of these offline IDs, either via direct deals or private marketplaces. In some respects, this means a publisher's first-party cookie (owned by the Wall Street Journal, for example, based on their consensual relationship with the user) will be treated similarly to how the industry historically handled a channel cookie (such as those offered by The Trade Desk for example). **Publisher's first-party cookies will become a valuable digital currency as brands will use them to find and target their customers across different publishers' domains.**

It's a new frontier for digital advertising and it's time for all parties to adapt – ideally before 2022 rolls around.

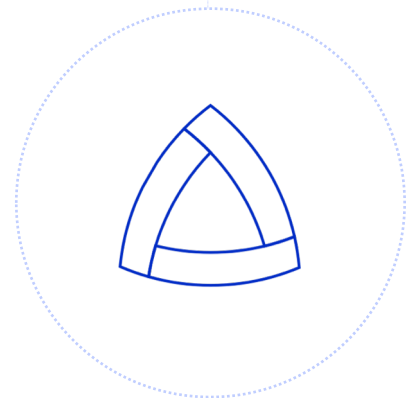


ZEOTAP - CUSTOMER INTELLIGENCE UNLEASHED

WHO ARE WE

Brand marketers' **obsession with first-party data is no secret** – and with the cookie-less future becoming an imminent reality, brands will hold onto it tighter than ever before. Customers still expect personalized interactions despite increasing privacy regulations. First-party data by itself, however, has proven to be just one piece to achieving multi-touchpoint personalization and more effective marketing.

With these industry challenges in mind, zeotap's mission is simple – we have built a **customer intelligence platform to help brands better understand their customers and better predict their behaviors**. Ultimately, our goal is that our customers can deliver heightened experiences and invest only in those relationships that matter. How do we achieve this? With our **modular privacy and security-compliant platform powered by our proprietary identity graph and a unified high-quality data layer**.



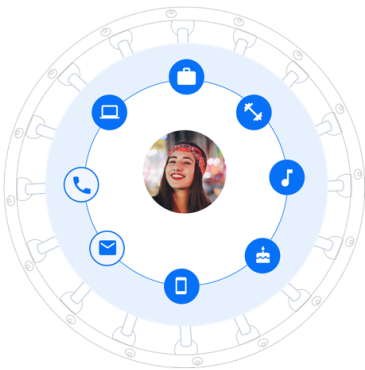
1. CUSTOMER INTELLIGENCE PLATFORM

Thanks to our engineers and data-scientists who comprise more than half our team, we've built a **one-of-a-kind one-stop-platform**. With an increasing **focus on first-party data strategies**, zeotap's tech capabilities offer brands a way to advance their own competitive edge and make the most out of their customer data through:

- 1st-party customer data unification across Web/Mobile/CRM
- Identity resolution (onboarding)
- 1:1 data profile enrichment with zeotap's data asset
- First and third-party data blending
- Machine-learning-based analytics all in a secure environment (data clean room)
- Audience building and activation

The interoperable and **modular tech stack is customizable for varying use-cases** (from customer activation, to cross/up-selling to customer retention) and serves the entire adtech and martech ecosystem thanks to its integrations and workflows between different pre-existing tech stacks: **publishers, channels, and data partners**.

2. PROPRIETARY IDENTITY GRAPH



Identity resolution is still today one of the most basic needs brand marketers are grappling to master. At zeotap, our focus has been on building a **patented identity graph** that's strong across identifiers, but especially on **MAIDs** (mobile AdIDs). We've partnered with large publishers and telecom operators to natively source mobile data (both identity data such as email addresses/phone numbers as well as profile data) mapped to MAIDs -- **making our cookie dependency almost nonexistent**.

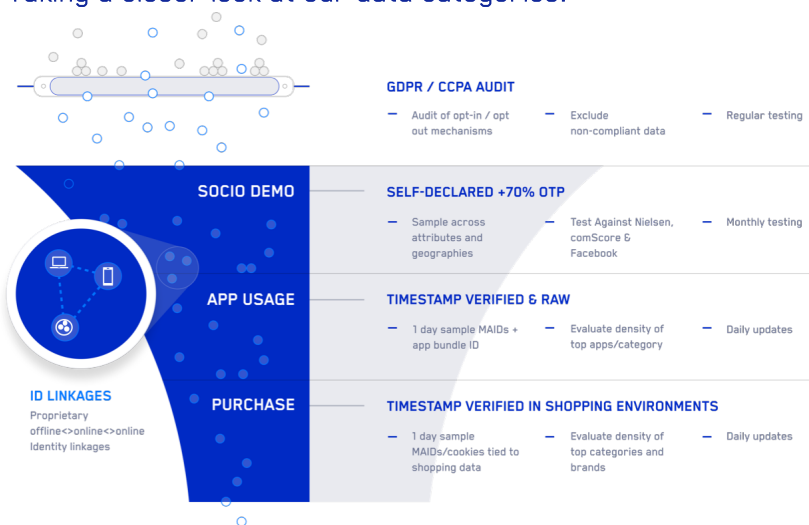
However, in order to better serve our clients and have a more complete identity graph, we also apply our own **deterministic mapping to link our dataset to cookies, and we source data directly mapped to cookies** (from large marketplaces, e-commerce shops, etc.).

With over **200M identity profiles** in our platform, our linkages are ID-verified/self-declared and therefore as accurate as they can be, allowing brands to deterministically connect their offline CRM data (emails/phone numbers) to online identifiers as well as online-to-online identifiers - allowing a truly **360-degree single customer view**.

3. UNIFIED HIGH-QUALITY DATA LAYER

We've **unified and curated the finest data in the market** for maximum marketing impact with precision and scale. Our sources are also highly curated, as we only accept data partners that have met our strict data sourcing principles: i.e. **uniqueness + quality + scale + GDPR and CCPA compliance.**

Taking a closer look at our data categories:



4. DATA AND SECURITY BY DESIGN

As a German founded company, we've built our platform with **security and privacy-by-design** principles that have been at the heart of our success as a **global customer intelligence partner**. We have earned stringent global certifications that prove our commitment to security and privacy, and we are **GDPR-compliant** across our European markets. With CCPA newly taking effect in the US, we have taken the same stance and become fully **CCPA compliant**.

Our certifications include:

- The enterprise-grade security ISO/IEC 27001
- CSA (Cloud Security Alliance) STAR Silver
- The GDPR-ready seal
- the CIPT (Certified Information Privacy Technologist)
- the CISSP (one of the most sought-after and elite certifications in the information security industry)
- the CCISO (Certified Chief Information Security Officer) certification amongst others.



HOW CAN WE HELP YOU NAVIGATE A COOKIELESS WORLD?

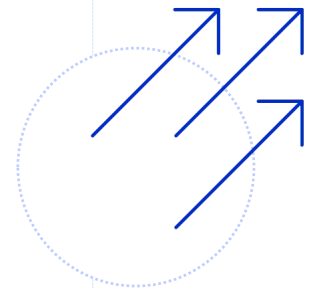
We've been preparing for this transition for over 2 years now.

We've had a privacy-compliant identity resolution solution that deterministically matches offline data (emails/phone numbers) to online identifiers for a while now. And the need to link first-party CRM data of customers (tied to email/phone) with the online domain will remain unaffected by Google's update. However, thanks to the agnostic nature of our current ubiquitous zeotap ID (zUID) that has been at the center of our identity resolution solution, we're currently working on expanding further its capabilities and integrating it into the martech ecosystem.

As of today, we have expanded to count over **500M device IDs linked to emails and phone numbers** within our platform, and we have also integrated with a wide variety of IDs such as connected TV IDs. We will continue to do so as the martech space evolves to **include connected car IDs, wearables IDs and smart home IDs amongst others.**

Thanks to our data enrichment capabilities that sit on top of our identity resolution capabilities, we can also **give deeper customer insights to any matched identifier**, which has intrinsic value for brand clients. Since our foundation, we have been on a mission to unify the best data that's out there and, as of today, we count **2 billion high-quality user profiles with data spanning sociodemographic, interest, app usage and purchase attributes.**

WE'RE HERE TO HELP CLIENTS NAVIGATE THE UPCOMING INDUSTRY SHIFT AND GUIDE THEM TOWARDS THE ONLY FEASIBLE SOLUTION: COOKIE-LESS ONLINE MARKETING STRATEGY.



MAKE SURE YOUR COOKIELESS STRATEGIES ARE ON TRACK FOR 2020

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