

WFA Webinar

The End of Cookies

And what to do next

Remote, November 20



Joining today



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Agenda

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The End of Cookies... and what to do next

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Q&A

Competition compliance page



The purpose of the WFA is to represent the interests of advertisers and to act as a forum for legitimate contacts between members of the advertising industry. It is obviously the policy of the WFA that it will not be used by any company to further any anti-competitive or collusive conduct, or to engage in other activities that could violate any antitrust or competition law, regulation, rule or directives of any country or otherwise impair full and fair competition.

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Members agree that they will not use the WFA, directly or indirectly, (a) to reach or attempt to reach agreements or understandings with one or more of their competitors, (b) to obtain or attempt to obtain, or exchange or attempt to exchange, confidential or proprietary information regarding any other company other than in the context of a bona fide business or (c) to further any anti-competitive or collusive conduct, or to engage in other activities that could violate any antitrust or competition law, regulation, rule or directives of any country or otherwise impair full and fair competition.

WFA Way



Open



Pro-competitive



Chatham House



Sincere

The Chatham House Rule: participants are free to use the information received, but neither the identity nor the affiliation of the speaker(s) may be revealed.

Recent WFA reports on 2025 media ecosystem

WFA **OUTLOOK2024**

TV Linear (Broadcast & Pay)
Forecast/Actual Cost Deflation/Inflation by Year

	2023 (Actuals)				2024 (Forecasts)			
	Count	Min	Max	Avg.	Count	Min	Max	Avg.
	7	+135%	+250%	+167%	6	+169%	+300%	+233%
Argentina								
Australia								
Austria								
Belgium								
Brazil								
Canada								
China								
Colombia								
Denmark								
France								
GCC								
Germany								
Hong Kong								
India								
Indonesia								
Ireland								

WFA World Federation of Advertisers **ebiquity**

Media Budgets 2025

WFA & Ebiquity annual survey

WFA and Ebiquity have published the 2025 Media Budgets survey results.

Your submission will be treated as confidential and will not be shared with other advertisers completing the survey.

For any questions, please contact:

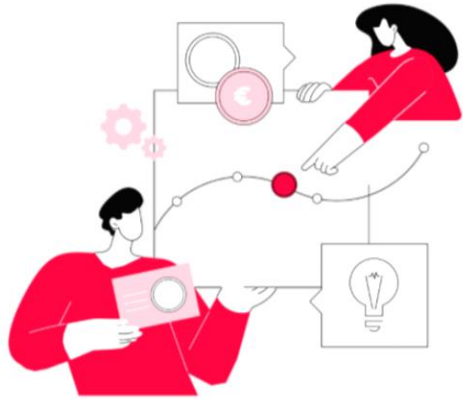
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Thank you for your participation!

WFA **MediaSense**

Future of Agency Remuneration



WFA's Outlook 2024
The industry's reference global annual media inflation and deflation report

GARM Sustainability
Action Guide to Future Media Greenhouse Gas Emissions

#SPOTLIGHT
Next Big Bets

The Global DEI Census
2023 results & insights

Global agency remuneration trends
2023 edition

Markets to Watch in 2023

WFA's Global Sourcing Board
Our journey forward

Sustainable marketing 2030
The sustainable marketing framework for the future

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WFA

Forum Connect, NY, Dec 4

Better Global Marketing Integration

- Open to WFA Media, CMO, Sourcing and Insights communities (c.200 attendees)
- Hear speakers from **PepsiCo, Kenvue, Henkel**, and more
- Discussing internal and external challenges to better integration, group workshops to shared solutions and world-class networking opportunities



WFA members sign up here



Second of three webinars in November

November 14

Today

November 26

Future of Media Agency
Remuneration

The End of
Cookies

Internationalising
media agency
contracts



MediaSense®



Prohaska Consulting



**Robert Wegenek
The Quarterback**

The Future of Third-Party Cookies and Privacy Safety

20 November, 2024



Welcome & Introductions

The current landscape is fragile – to the benefit of some.



- Brands have invested millions of dollars in attribution systems that rely on tracking users through 3rd party cookies and MAIDs.
 - Being able to track through to conversions, whether they be a sale, a view, a visit, a download is something we have all gotten pretty used to and even with that there is still improvement to be made.
- Ultimately, we all want to know where to spend our advertising dollars and how to spend them most efficiently.



Apple allows users to block certain types of content in Safari, such as ads tracking scripts and elements that can cause slow page loads.

Apple introduced Storage Access API Partitioned Cookies no longer persistent, blocked cookies set to purge.

Apple limits single set of cookies per site. 7-days storage cap for client-side cookies. Partitioned cache verification.

Apple implements Enhanced Prevention of Tracking Via Link Decoration. Updates the Storage Access API.



Announces Privacy Sandbox

Cookies for cross-site resources are now blocked by default. 7-Day Cap on all Script-Writable Storage. Release of Cookie Blocking Latch Mode and Detection of Delayed Bounce Tracking.

Saps the expiry of cookies set third-party CNAME-cloaked HTTP responses to 7 days. SameSite=Strict Cookie Jail for Bounce Trackers. Third-Party Cookie Blocking and Storage Access API.

Releases iOS 14.5. On-by-default feature Private Click Measurement for Web to Web, and App to Web. App Tracking Transparency (APP) required for app tracking.

Releases iOS 15. App Privacy Report, Hide my IP for trackers in Safari, Hide my IP for external content in mail, Hide My Email, iCloud Private Relay.

Google Ads plans a (US) release "About This Ad" giving users more transparency and control of which ads to see.

Google replaces FLOC with TOPICS API

Google opts to have its audience self-deprecate cookies in Chrome

Sep 2015

Jun 2017

Feb 2018

Jun 2018

Feb 2019

Apr 2019

Sep 2019

Dec 2019

Feb 2020

Mar 2020

Jun 2020

Nov 2020

Mar 2021

Apr 2021

Jun 2021

Sep 2021

Oct 2021

Late 2021

Late 2021

Jan 2022

Q1 2024

Jul 2024

Nov 2024

Source: IAB

Released IPT 1.0. Reduced cross-site tracking by further limiting third-party cookies and other website data.

Removal of 24-hour cookie access windows. Users prompted for Storage API access. Restrict first-party bounce trackers.

Rolls out Tracking Via Link Decoration Caps, and Client-Side Cookies to 1 Day of Storage.

Local Storage marked for deletion, pages are navigated to from a classified domain to a landing URL with a query string or fragment identifier. Deletion after seven days no user interaction.

Privacy Sandbox Proposals via W3C Groups

App-Bound Domains feature limits the domains on which an app can utilize APIs to track users during in-app browsing.

FLoC Origin Trial Testing Kicked-off

Announces delaying Privacy Sandbox until 2023.

Google Ads plans to release data-driven attribution to become the default model for all Google Ads Conversion.

Android 12 will limit developer's access to Google Advertising ID (GAID) on allowing users to opt-out of ad personalization. Will allows users to share "approximate" location instead of precise.

Starting in early 2024, Google plans to migrate 1% of Chrome users to the Google Privacy Sandbox and disable third-party cookies for them.

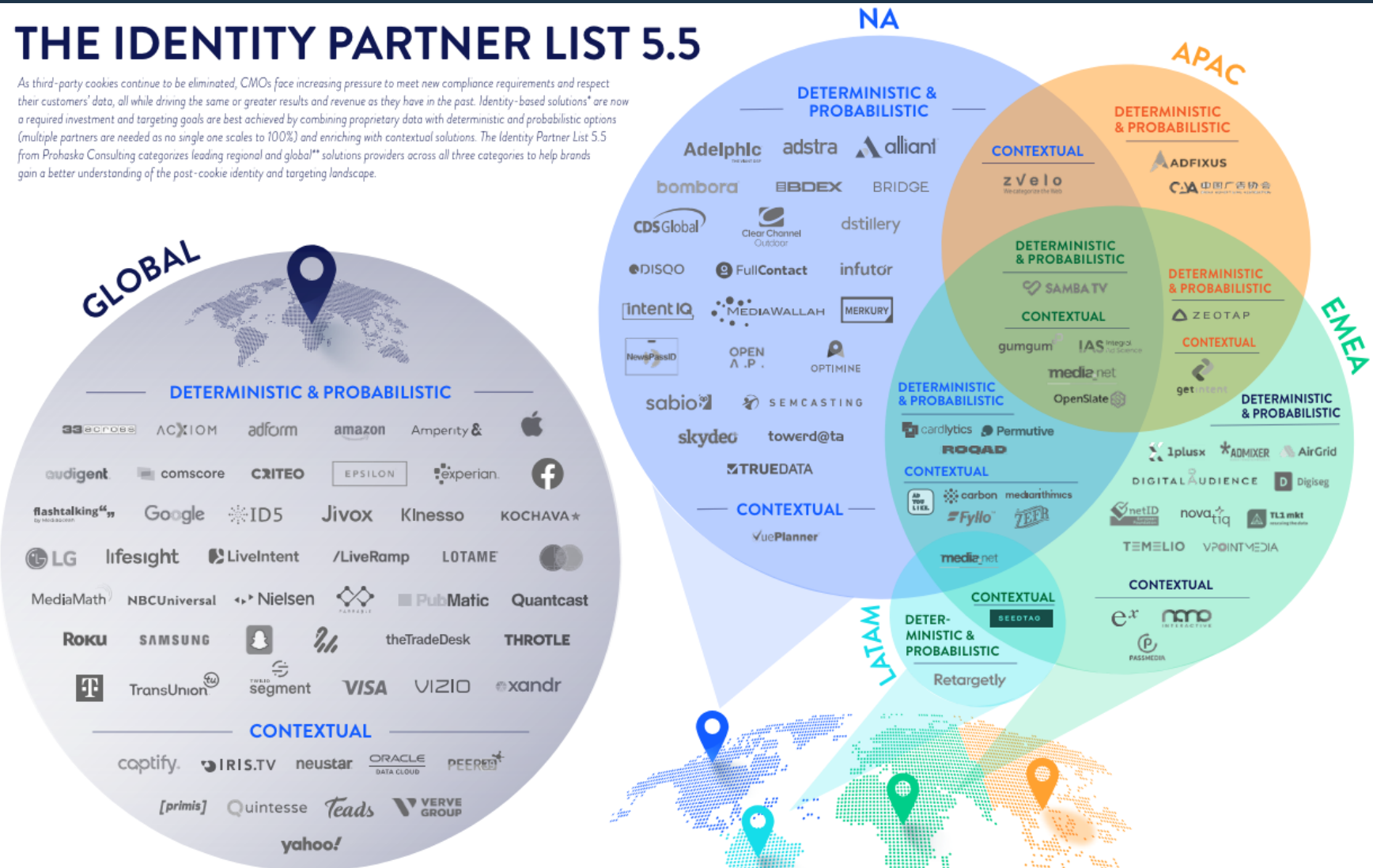
Judgement forcing Google to sell Chrome



The Identity landscape continues to explode worldwide.

THE IDENTITY PARTNER LIST 5.5

As third-party cookies continue to be eliminated, CMOs face increasing pressure to meet new compliance requirements and respect their customers' data, all while driving the same or greater results and revenue as they have in the past. Identity-based solutions* are now a required investment and targeting goals are best achieved by combining proprietary data with deterministic and probabilistic options (multiple partners are needed as no single one scales to 100%) and enriching with contextual solutions. The Identity Partner List 5.5 from Prohaska Consulting categorizes leading regional and global** solutions providers across all three categories to help brands gain a better understanding of the post-cookie identity and targeting landscape.



Most recent Identity Partner List Available
for download at

<https://prohaskaconsulting.com/ipl>

Beyond cookies... data loss from mobile devices.

TECH

Facebook strikes back against Apple privacy change, prompts users to accept tracking to get 'better ads experience'

PUBLISHED MON, FEB 1 2021-10:00 AM EST | UPDATED MON, FEB 1 2021-2:36 PM EST

Apr 1, 2021, 01:45pm EST | 5,569 views

Apple Rejecting Apps With Fingerprinting Enabled As iOS 14 Privacy Enforcement Starts

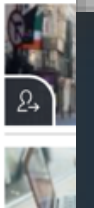
John Koetsier Senior Contributor @

Ask app not to track? Thanks, I'll do just that

Apple's data transparency feature hasn't hurt social media giants – at least not yet

Mon, Jul 26, 2021, 13:47

Subscribe



Technology

Facebook Users Said No to Tracking. Now Advertisers are Panicking

People give iOS apps permission to track their behavior just 25% of the time

By Kurt Wagner

July 14, 2021, 9:00 AM EDT

PODCAST: ADEXCHANGER TALKS

Turning Signal Loss Into A Gain

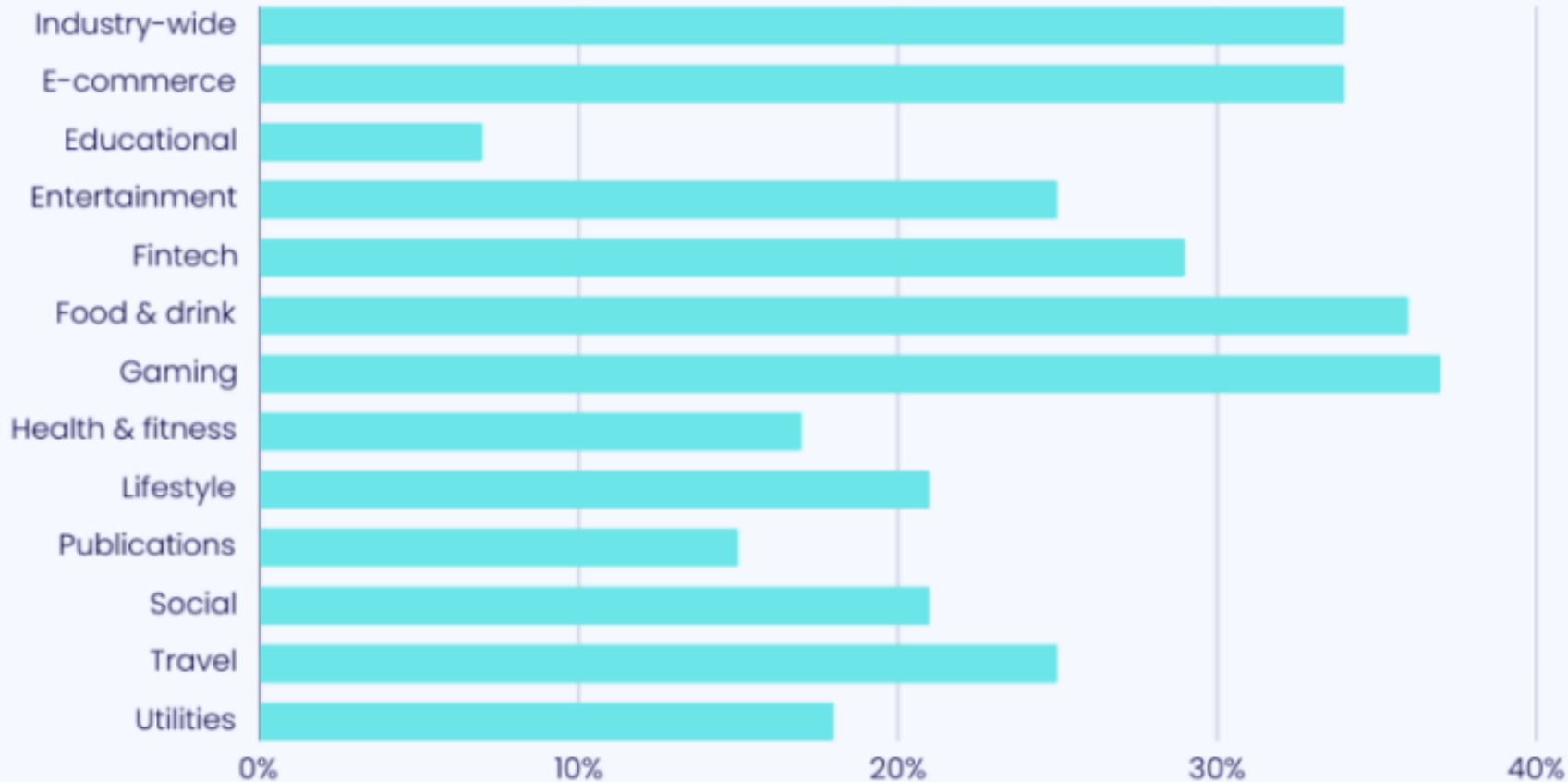


By Allison Schiff

TUESDAY, APRIL 16TH, 2024 - 6:00 AM

SHARE: [in](#) [en](#) [x](#) [f](#) [+](#)

App tracking opt-in rate for iOS = 34%.



Source: MAF 2023

Before iOS 14.5

70%

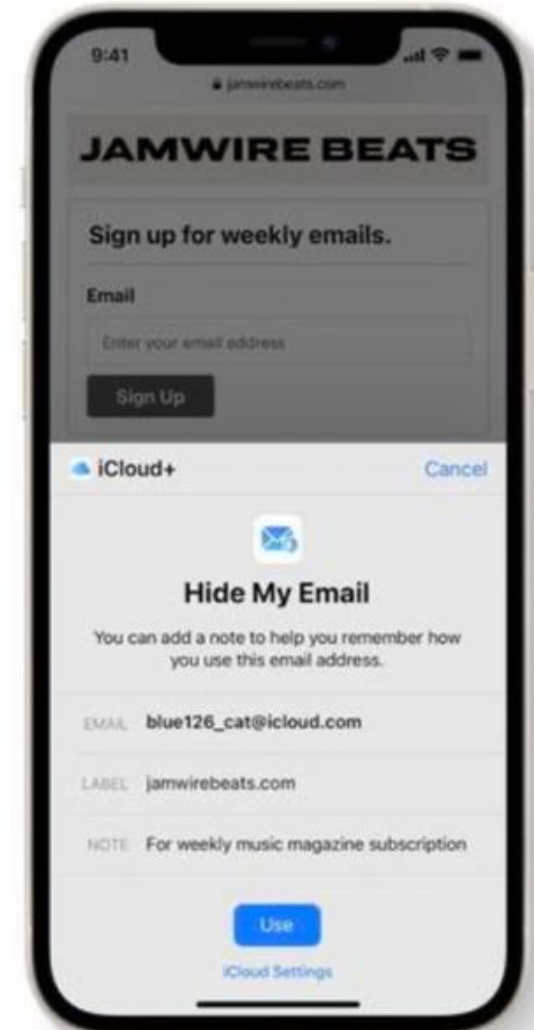
of people shared
their IDFA with
publishers

Optimize Smart

Hide my Email

- **Why this matters:**
Email addresses are often used as the unique identifiers in automation platforms that help businesses tailor marketing and customer service
- **Implication:**
If someone calls customer service and gives their real email, they won't be found in the system

Available to all Apple iCloud+ paid account holders using Safari (currently, ~20% of iPhone users)



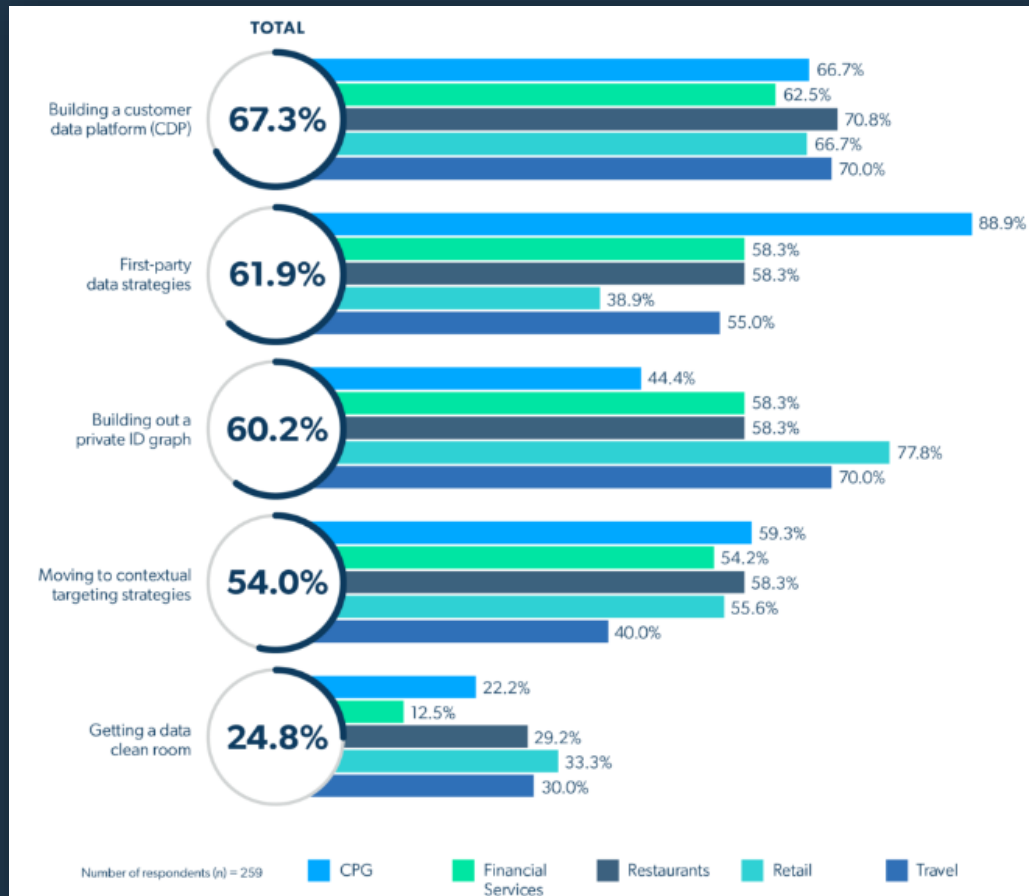
Private Relay: VPN in your pocket

- **Why this matters:**
Normally when a user browses the web, information contained in the web traffic, such as your DNS records and IP address, can be seen by a network provider and the websites visited
- **Implication:**
This information could be used to determine identity and build a profile of location and browsing history over time

Available to all Apple iCloud+ paid account holders using Safari (currently, ~20% of iPhone users)



How marketers are preparing for signal loss



- CDPs
- First-party data strategy
- ID graphs
- Contextual targeting
- Clean rooms

Emerging Alternatives to Third-Party Cookies

As the demise of third-party cookies looms, the industry is exploring innovative solutions to enable personalized advertising while respecting user privacy. These alternatives aim to deliver targeted experiences without relying on intrusive cross-site tracking.



Defining data types that drive identity

What It Is

Where It Comes From

3P

Aggregated Data and sold from multiple sources

- From aggregated sources “Appended”
- Significant scale
- Many targeting options
- Typically, least expensive

2P

Owned by a known partner (publisher, marketer, OEM)

- Limited scale outside of endemic environment
- Source is disclosed
- Can select contextually relevant data
- Higher cost

1P

Advertiser’s own data (most valuable)

- Unique to advertiser/publisher
- Limited scale
- Collected mostly from actual behavior
- “Free” (to use, not collect)



The new gold standard: Zero-party data*

“Zero-party data is gold. ... When a customer trusts a brand enough to provide this really meaningful data, it means that the brand doesn’t have to go off and infer what the customer wants or what [their] intentions are.”

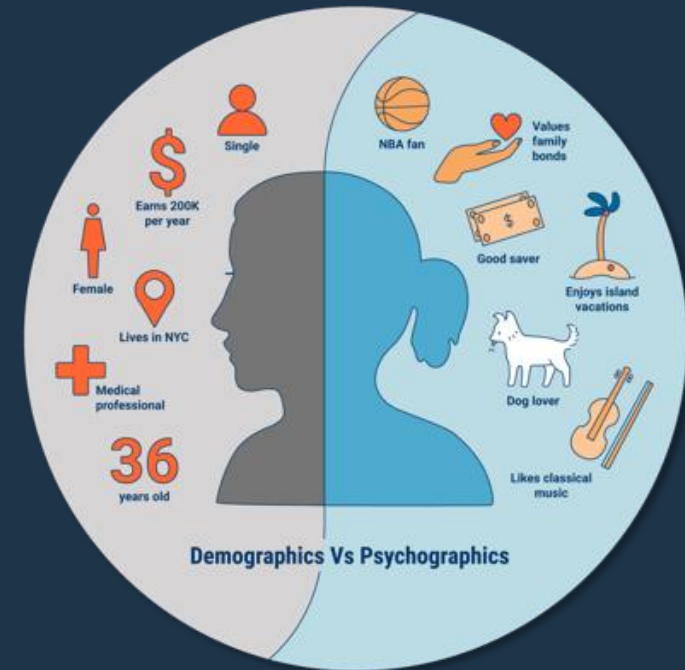
- Forrester’s Fatemeh Khatibloo, VP & Principal Analyst

How It’s Similar to 1st Party Data

- Highly accurate and reliable
- Provided by the consumer – but with intention

Where It Voluntarily Provides More Detailed Data

- Comms Channel Preferences
- Provider Preferences
- Email list subscriptions
- Custom Payment Preferences
- Psychographics



The importance of interoperability



A new landscape of disparate IDs will require unification to conduct reporting, attribution and analysis



IDs must be assembled and stitched to one or several interoperable IDs for targeting, personalization & measurement



Raw impression level data will also need to be captured by interoperable ID players for ad performance studies

3 critical tools for marketers in identity management

Customer Data Platform (CDP) or EDP

CDP and Data Warehouse need to be up to speed with housing the latest data and activation

It may be time to think about an Enterprise Data Platform

Consent Management Platform

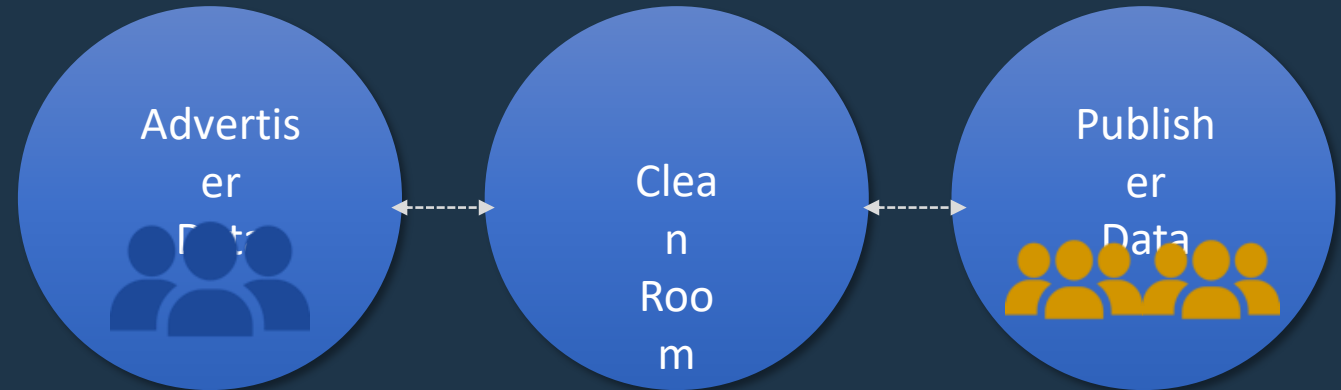
- Without the proper Consent, your first-party data is at risk
- Legal regulations and brand reputation management are concerns that proper consent addresses

Clean Room

The ability to connect your data easily and between partners is key
Requirement for Addressability and Measurement in today's landscape

Clean rooms: The modern gateway to audiences

Clean Rooms give advertisers a secure location to join disparate data sets in a privacy-compliant manner.



Clean Rooms allow advertisers to:

- Anonymize, analyze, and match two or more data sets to build targeted, custom or multi-channel audiences
- Partners may be retailers, other brands, or publishers

Brand Purchase Data	Publisher/Platform Data	Overlap Count
Product A	Tech Enthusiasts	500,000
Product B	Football Fans	450,000
Product C	Travel Enthusiasts	700,000
Product-D*	Fitness-Buffs*	2*
Product E	Foodies	200,000



What can you accomplish with clean rooms?



Optimize your ROI:

Publishers are empowering advertisers to connect their own first-party data to impression logs, audience segments and user attributes to deliver richer, more actionable consumer insights while being able to address and adapt to a changing data and privacy landscape.



Analyze the Customer Journey:

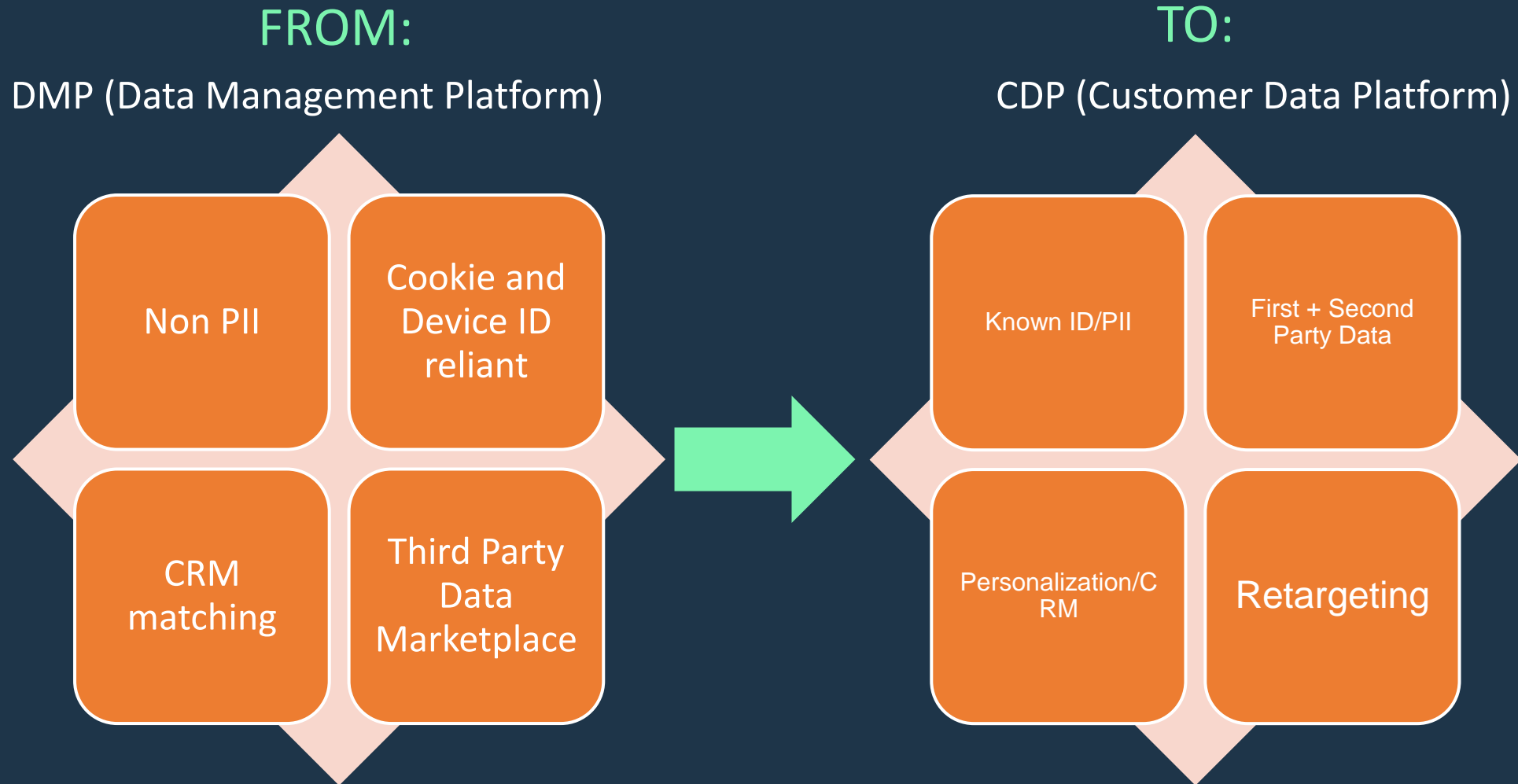
Brands can get comprehensive and accurate data about their consumer's interests and behaviors, while not revealing personally identifiable information from tapping into publisher data to deliver better experiences for consumers and more effective campaign performance.



Improve Media Measurement:

Brands working within the walled garden clean rooms can tap into data that can uniquely help them stitch together better measurements.

How technology is adapting to market shifts



Evolving Privacy Concerns

Consumer Privacy

Growing concerns over data privacy and personal information usage have led to increased scrutiny of digital advertising practices.

Regulatory Changes

New laws and regulations, such as GDPR and CCPA, aim to give consumers more control over their data and how it is used.

Trust and Transparency

Brands and advertisers must prioritize transparency and build consumer trust to navigate the evolving privacy landscape.



Regulatory Changes



GDPR and CCPA

Landmark privacy regulations like the EU's General Data Protection Regulation (GDPR) and California's Consumer Privacy Act (CCPA) have significantly impacted the use of third-party cookies, requiring more transparency and user consent.



Evolving Regulations

As privacy concerns grow, more jurisdictions are enacting laws to limit the collection and use of personal data, driving the need for advertisers to adapt their strategies.



Enforcement and Penalties

Non-compliance with these regulations can result in hefty fines and legal action, making it critical for businesses to stay informed and adjust their data practices accordingly.

The EMEA privacy regulation list continues to grow.





ID-Based Solutions

UID 2.0

A universal identifier standard proposed to replace third-party cookies, aimed at enabling personalized advertising while improving user privacy.

FLoC

Google's Federated Learning of Cohorts, a privacy-preserving alternative that groups users into cohorts based on browsing behavior.

Persistent IDs

Solutions that assign a unique and persistent identifier to users, allowing for targeted advertising without relying on third-party cookies.

Investing in First-Party Data Collection

Comprehensive Data Gathering

Actively collecting first-party data, such as customer interactions, purchases, and preferences, provides a rich, privacy-compliant dataset to power your digital advertising strategy.

Personalized Experiences

Leveraging first-party data enables you to deliver highly personalized and relevant content and offers, improving the customer experience and driving engagement.

Adaptable Strategies

As the third-party cookie landscape evolves, first-party data becomes increasingly vital, allowing you to continuously refine your targeting and measurement approaches.

Competitive Advantage

Investing in a robust first-party data strategy can give you a competitive edge, as brands with strong first-party data are better equipped to navigate the privacy-focused future.

Leveraging Emerging Identity Solutions

Unified Identities

Embrace solutions that provide a unified, privacy-compliant identity for consumers across devices and platforms, enabling seamless targeting and measurement.

Contextual Targeting

Leverage contextual targeting using AI-powered solutions that analyze page content and user intent to serve relevant ads without relying on third-party cookies.

Consent-Based Approaches

Implement consent management platforms to transparently obtain user consent for data collection and targeting, ensuring compliance with privacy regulations.

First-Party Data Strategies

Invest in building first-party data pools and leveraging zero-party data provided directly by consumers to power personalized advertising experiences.

Challenges in Tracking and Measuring Performance

Cross-Device Tracking

Accurately attributing conversions across multiple devices used by the same consumer is a key challenge in a cookie-less future.

Fragmented Data Sources

With the loss of third-party cookies, marketers must integrate data from various first-party and identity-based sources to measure campaign effectiveness.

Privacy-Preserving Measurement

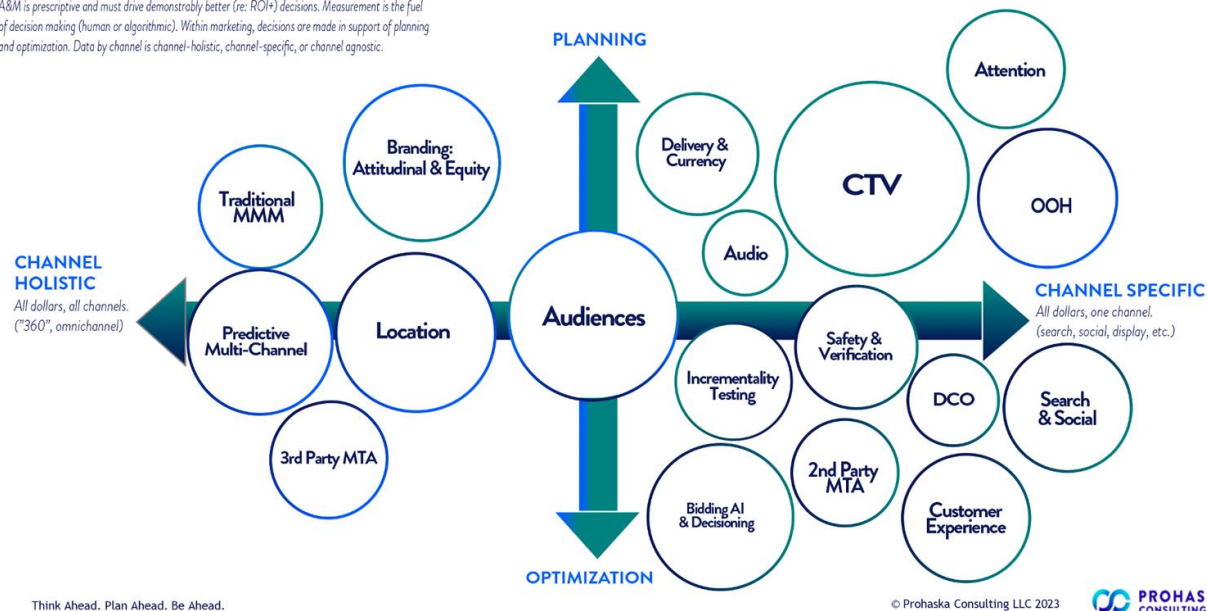
Implementing privacy-first techniques like differential privacy and federated learning is crucial to enable performance tracking while respecting consumer privacy.



Measurement Curates Specialized Tools & Data

LAMP: LANDSCAPE OF ATTRIBUTION & MEASUREMENT PARTNERS 1.5

A&M is prescriptive and must drive demonstrably better (re: ROI+) decisions. Measurement is the fuel of decision making (human or algorithmic). Within marketing, decisions are made in support of planning and optimization. Data by channel is channel-holistic, channel-specific, or channel agnostic.



Measurement usually involves curating specialized tools.



Need flows from process and channel demands



Advanced practices manage cross-decision impact.

Fluidity Wins!

Download the LAMP 1.5 here: <https://prohaskaconsulting.com/the-landscape-of-attribution-measurement-providers-lamp>

Measure: Align & validate against your media plan

Changes in data means you may need to test measurement alternatives

Aggregate MTA

*Rules-based
“First & Last Touch”*

Dynamic MMM
(AI Driven)

*Predictive Scenario
Planning / Decisioning*

Incrementality
Testing

*Reach Curves & Contact
Stream Optimization*



Search engine optimization

Email marketing

Content marketing

Strategies for a Privacy-First, Post-Cookie Digital Ecosystem

1 Embrace First-Party Data

Invest in collecting and activating your own customer data through opt-in experiences and zero-party data.

3 Explore Identity Solutions

Evaluate privacy-focused identity frameworks that enable personalization while respecting consumer privacy.

2 Leverage Contextual Advertising

Adapt to cookieless targeting by focusing on relevant content and user context rather than individual profiles.

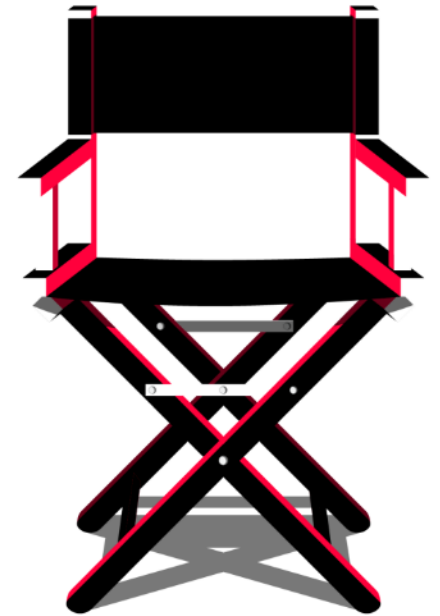
4 Emphasize Transparency

Build trust by clearly communicating data practices and providing users with meaningful choice and control.

Thank you!



Questions



And finally... please let us know your 2025 priorities



Competition compliance page



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