



LiveIntent Industry Pulse Survey:

# Third-party Cookies and Identity

How publishers and marketers are preparing for  
the cookiepocalypse.

# Introduction

On January 14th, 2020, Google announced that it would no longer support the use of third-party cookies. With Google Chrome accounting for approximately 48 percent of internet browser market share in the United States<sup>1</sup> and Apple's Safari and Mozilla Firefox already operating without third-party cookies, the announcement means a fundamental change to the digital landscape.

Technology companies across the space have sprung into action, finding new ways to solve for identity resolution. But are marketers and publishers prepared to implement these solutions?

In Q4 2020, LiveIntent released the results of a survey conducted with 200 senior marketing and publishing executives from small to mid-sized companies to examine how the industry is preparing for the end of third-party cookies. This report leverages survey data to inform the industry of its approach to implementing identity resolution practices and solutions.



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<sup>1</sup> Market share of leading internet browsers in the United States and worldwide as of September 2020, Statista, October 2020

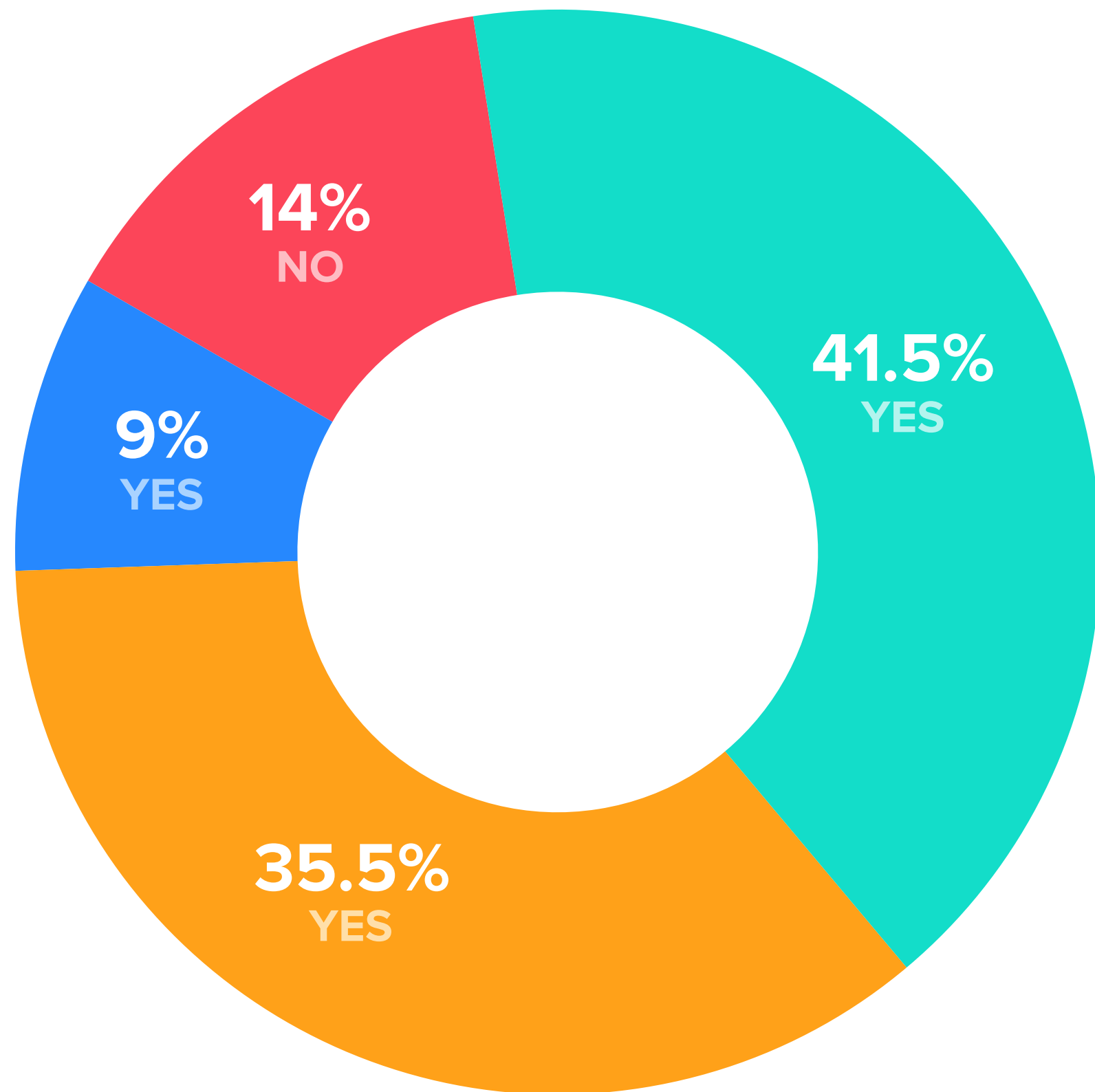






# 1. Reliance on third-party cookies

Programmatic advertising was built upon third-party cookies. It's understandable then that **85 percent of publishers and marketers are concerned about the 2022 phase-out**, with **39 percent expressing moderate to extreme concern**. The industry's reliance on third-party cookies is further underscored by **79 percent of publishers and marketers still relying on third-party cookies as their primary data component to determining audience identity**.



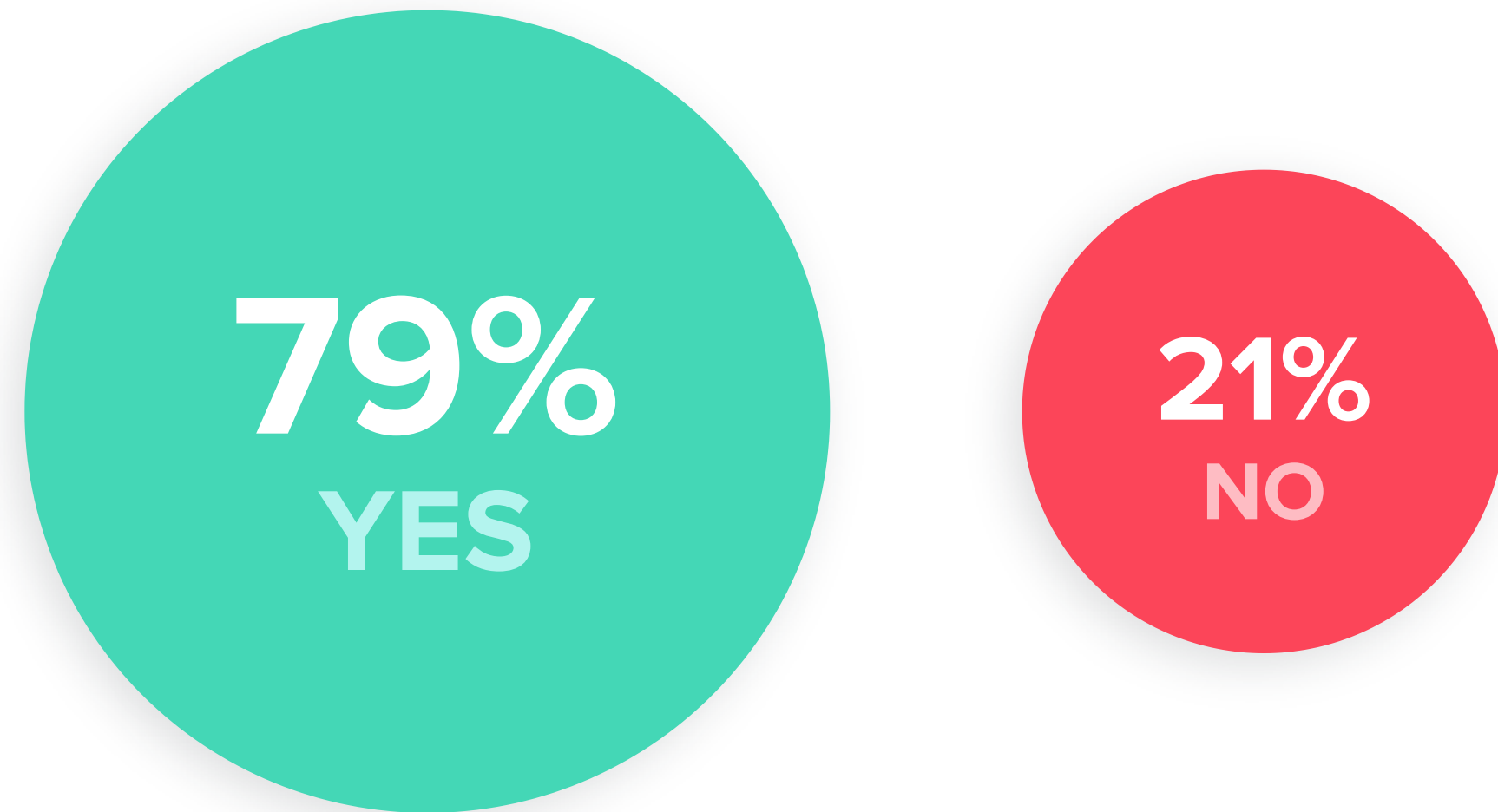
# Do you understand how advertising measurement and attribution currently works in the digital ecosystem?



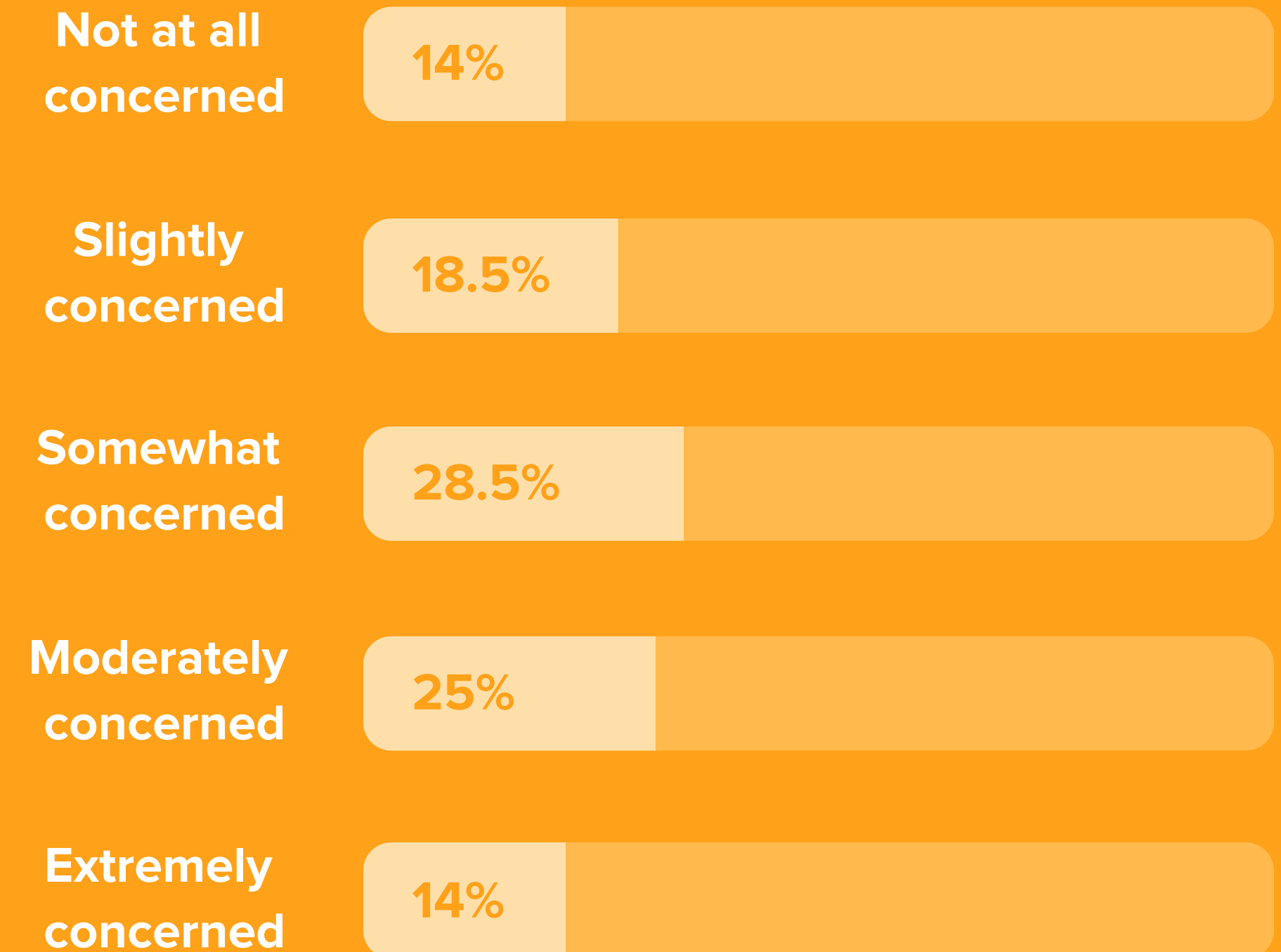
-  **Yes**, it relies on third-party cookies
-  **Yes**, it relies on third-party data (data that did not originate with the buyer or seller)
-  **Yes**, it relies on something else
-  **No**



**Does your marketing still primarily rely on third-party cookies to determine audience (customer or prospect) identity?**



**Are you worried about the future of advertising as third-party cookies phase out?**



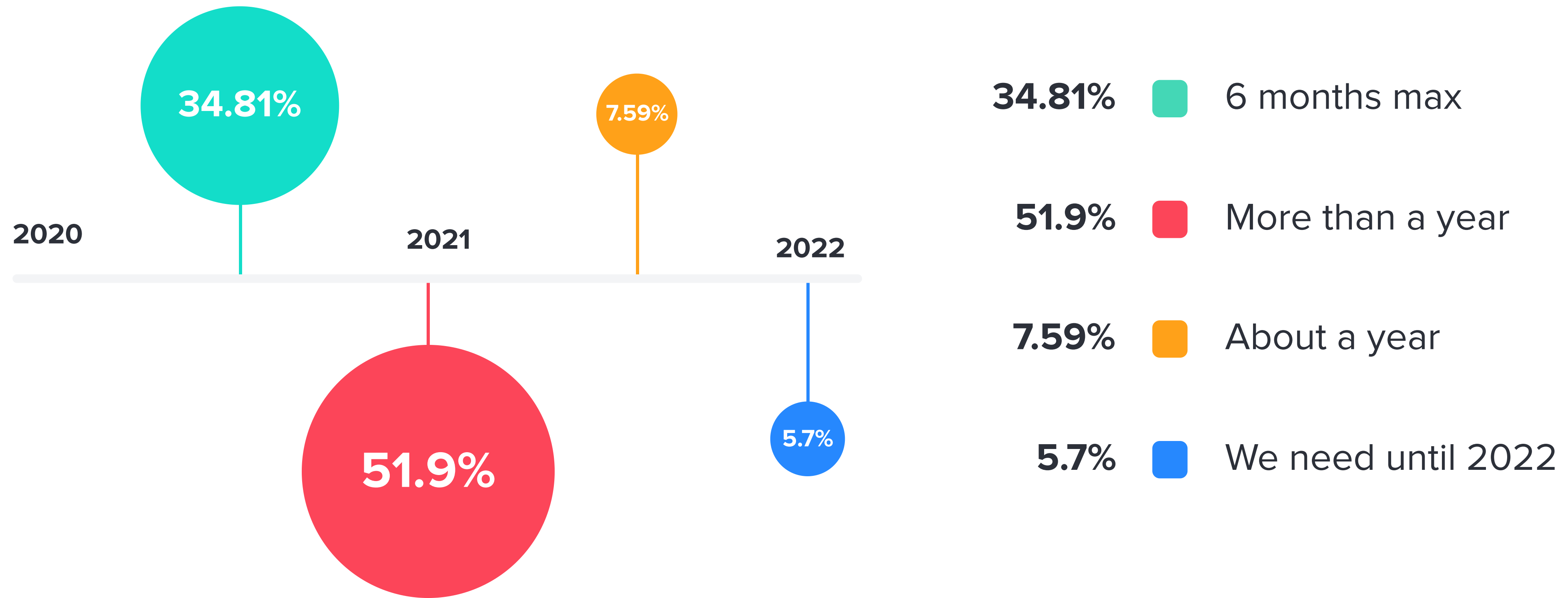
## 2. Planning for the demise of third-party cookies

It appears that the magnitude of Google's decision to phase out third-party cookies has created doubt and planning paralysis in the industry. This may explain why nearly **30 percent of survey respondents lack confidence in their plans to resolve identity after the demise of third-party cookies**, while another **39 percent** don't have a plan in place at all. Perhaps it's wishful thinking that Google will postpone its 2022 deadline. Time will certainly tell.

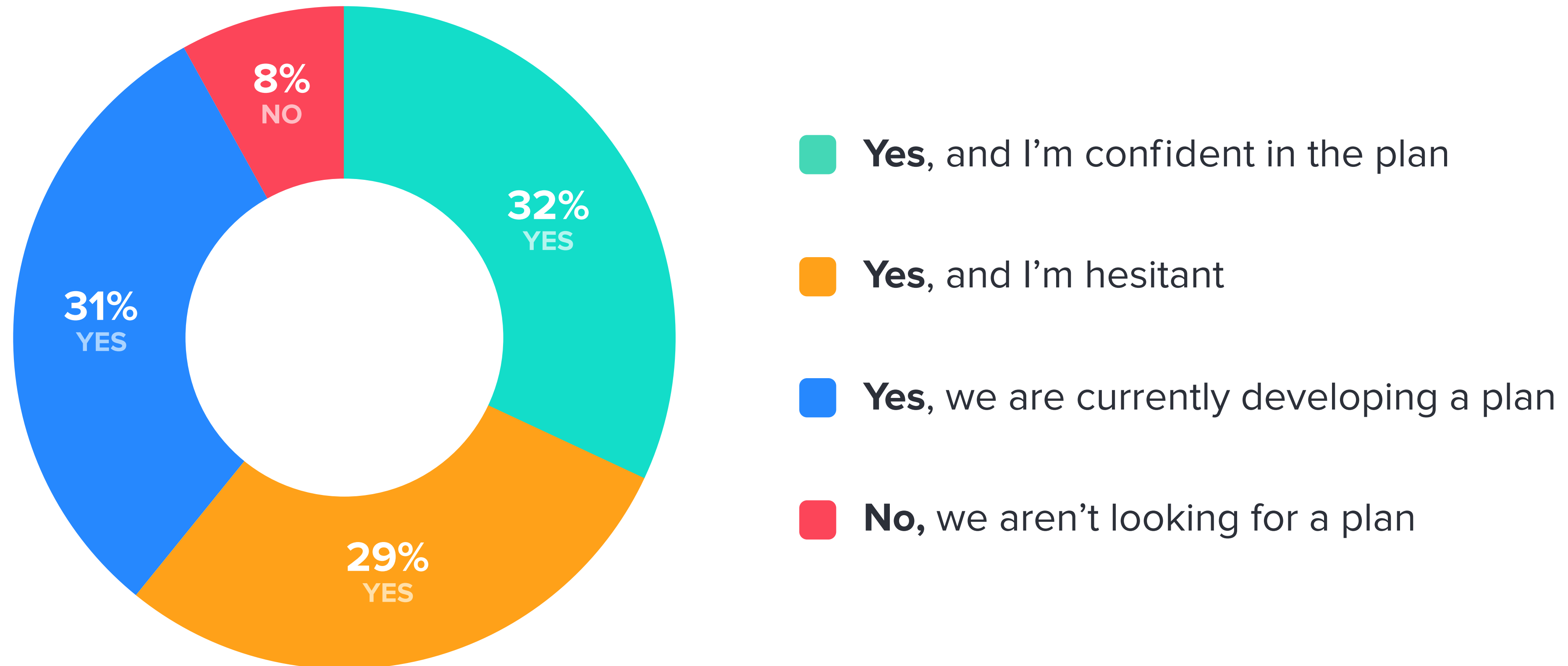
The industry understands the importance and need for collaboration when solving for identity resolution and is taking steps to facilitate cross-departmental meetings. However, findings suggest that publishers and marketers alike will be cramming to resolve identity in the upcoming months. A whopping **82 percent of respondents held less than five meetings to address identity in 2020**. Another **87 percent** indicated they only need about a year or less to shift from third-party cookies to another identity solution.



# What's your timeline to shift from third-party cookies to another identity solution?

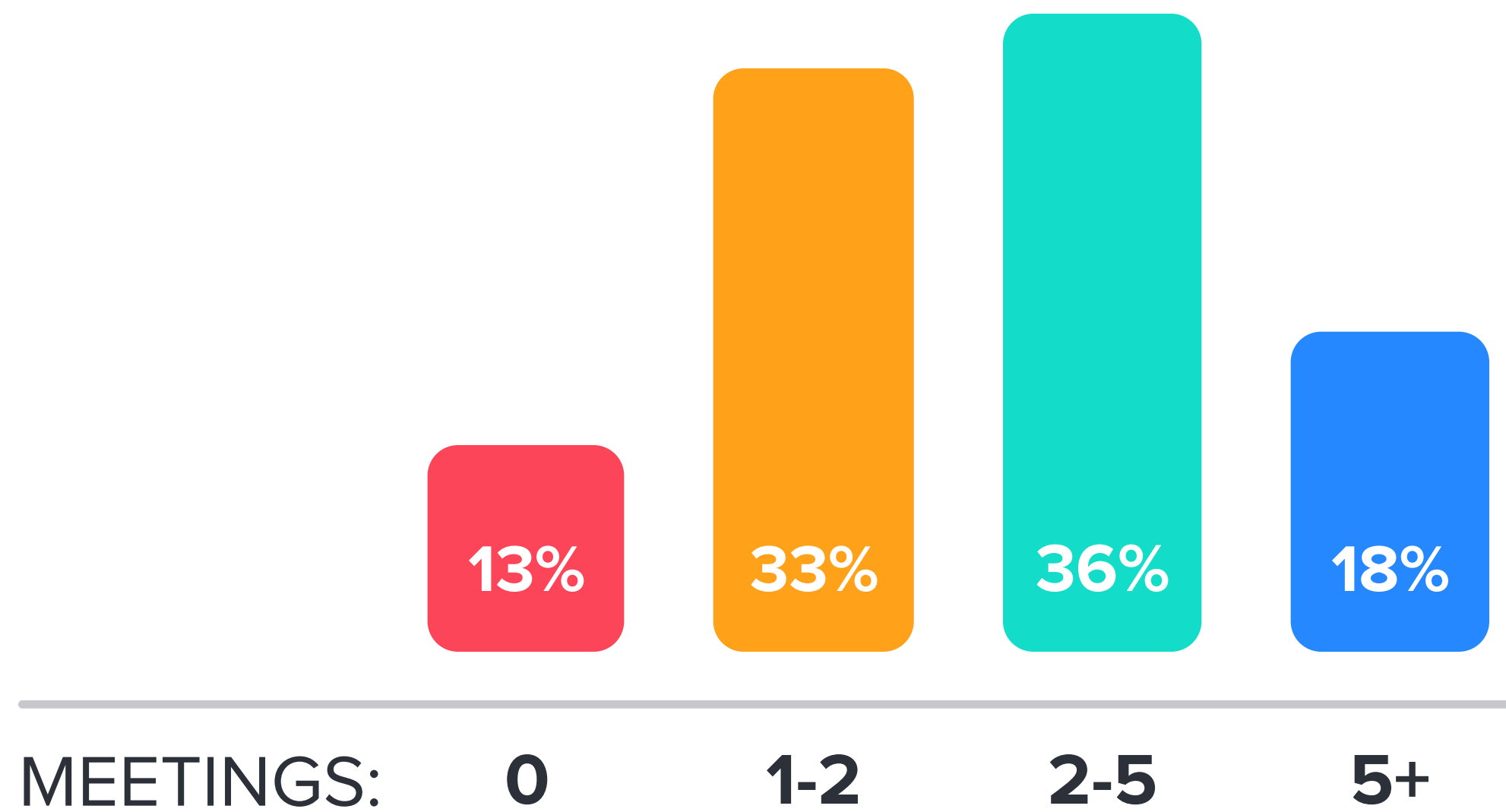


# Do you have a set plan to resolve for identity once third-party cookies are phased out?





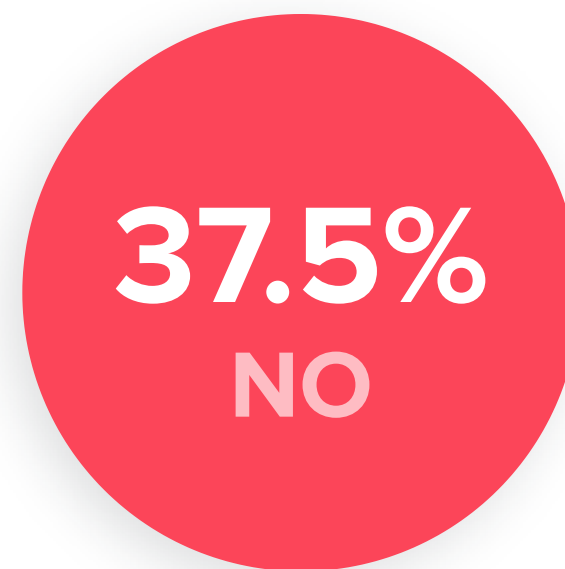
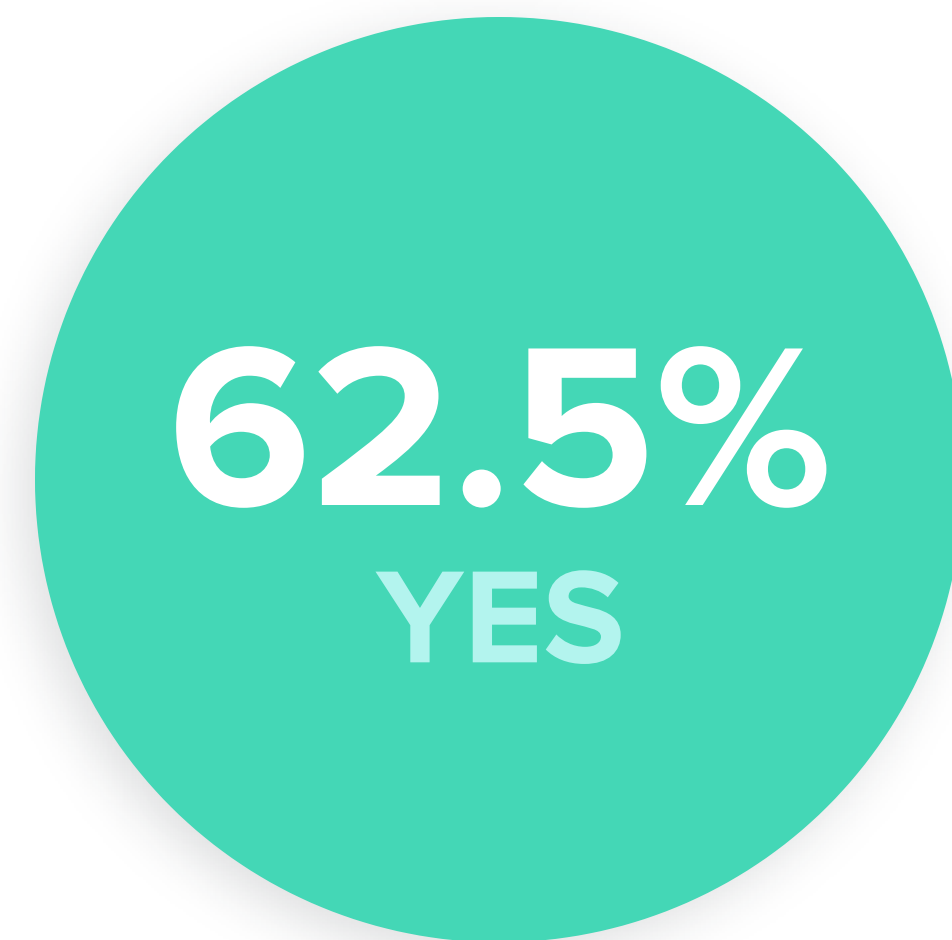
## How many meetings has your company had around identity in the last year?



## Who is involved in the meetings about identity replacement? (Pick all who apply)



# Do you think that Google will delay it's 2022 deadline for the full cookie phase out?

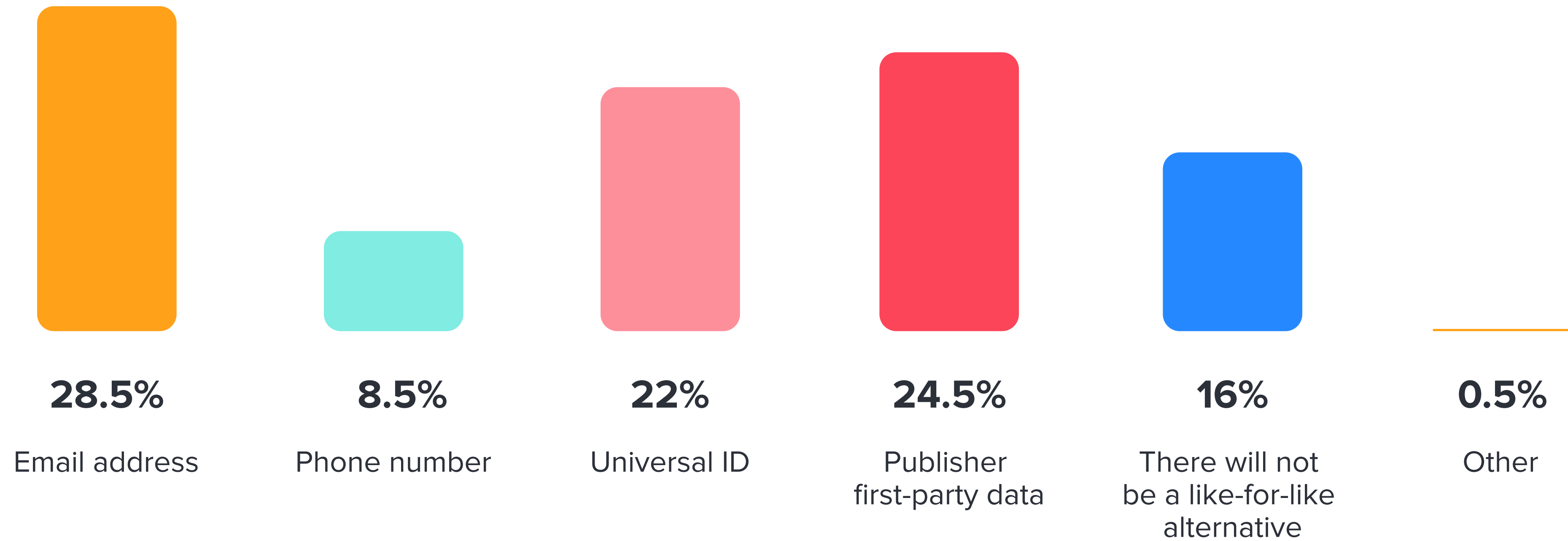


# 3. Identity resolution in a world without third-party cookies

Publishers and marketers believe that the email address will play a critical role in whatever serves as a cookie replacement. Furthermore, publishers recognize that collecting **first-party data** like email addresses will remain a critical component to both identity and monetization.



# What type of data will emerge as a cookie replacement for identity?



## What role does the email address play in understanding consumer identity today?

It's the key to identity across channels

27%

It's primarily for monetization

30%

It's important for both identity and monetization

34%

No role

9%

## If you opt-in to The Trade Desk's Unified ID 2.0 solution, will you still need to collect emails?

67%  
YES

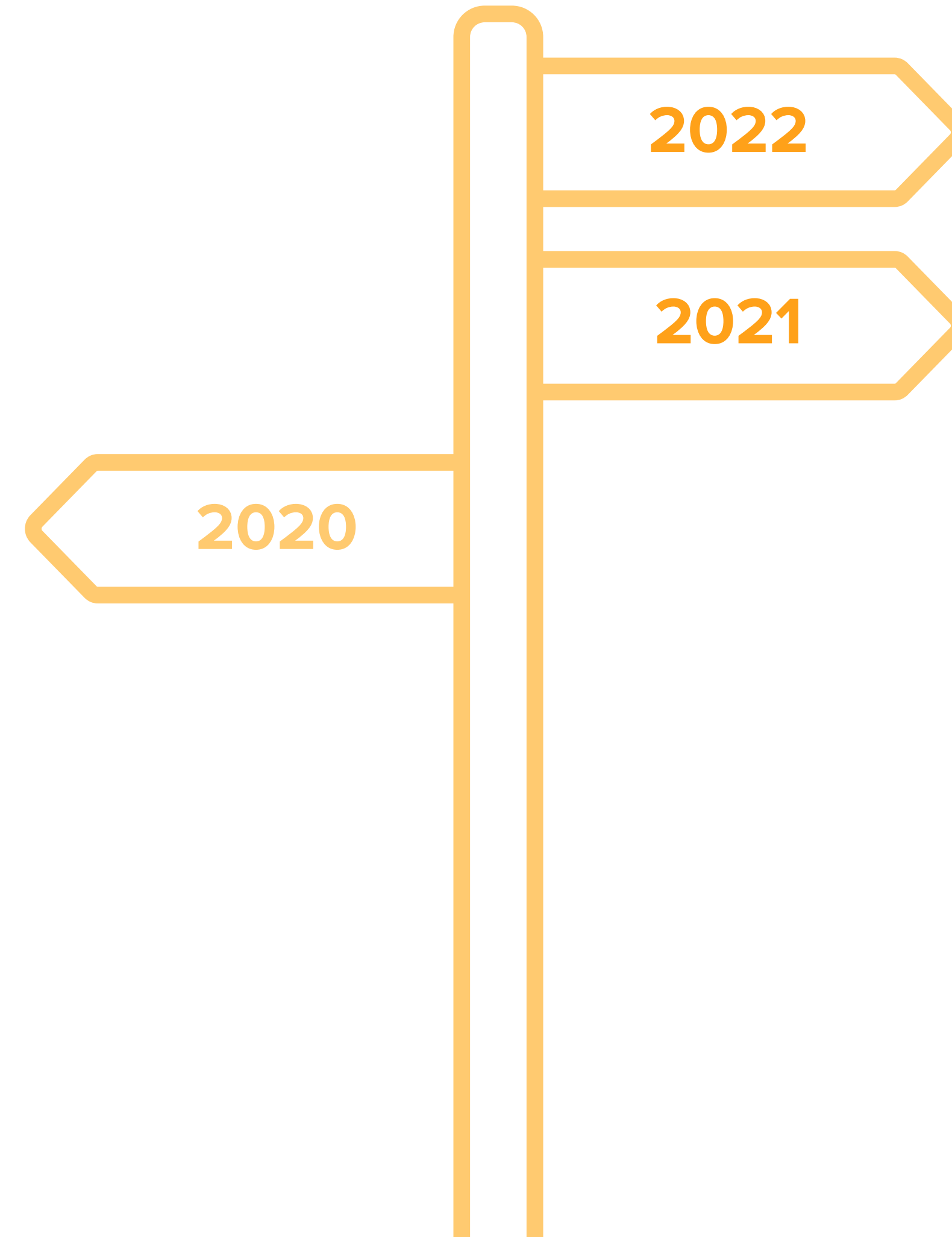
33%  
NO



# Looking Ahead

As the industry approaches the eventual sunset of third-party cookies, a variety of identity resolution solutions will undoubtedly arise. Publishers and marketers will need to think critically about which solution best matches their organization's needs and assets for building identity frameworks.

Whichever approach publishers and advertisers take to identity resolution, bridging the gap between a world with third-party cookies and one without by using proprietary media assets will be tantamount to survival in the new era.



**LiveIntent remains committed to utilizing the power of email to connect brands with over 200 million authentic readers across all types of media.**

LiveIntent harnesses the power of email to bridge identity across the programmatic ecosystem and makes people-based marketing possible without third-party cookies. Learn how LiveIntent's identity framework, Authenticated Bridge, can solve the challenges of identifying web users, targeting custom audiences, and measuring outcomes without the presence of third-party cookies. Secure your place in an addressable, first-party future without compromise by leveraging an open, proven solution that works with any technology partner or identified.

For more information, reach out and we can help. [Contact Us](#)

