Teads
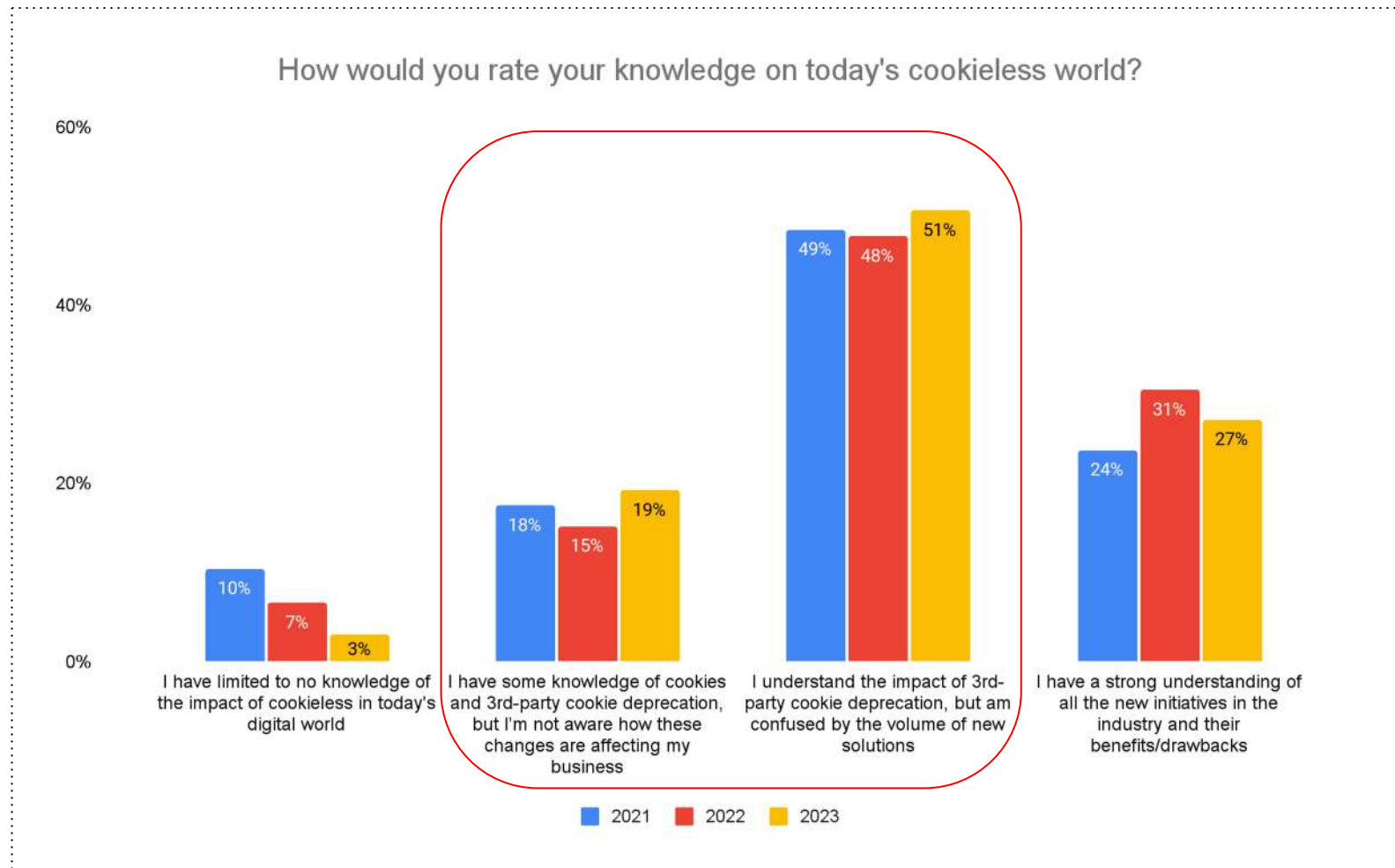
Publisher Cookieless Survey

Results 2023
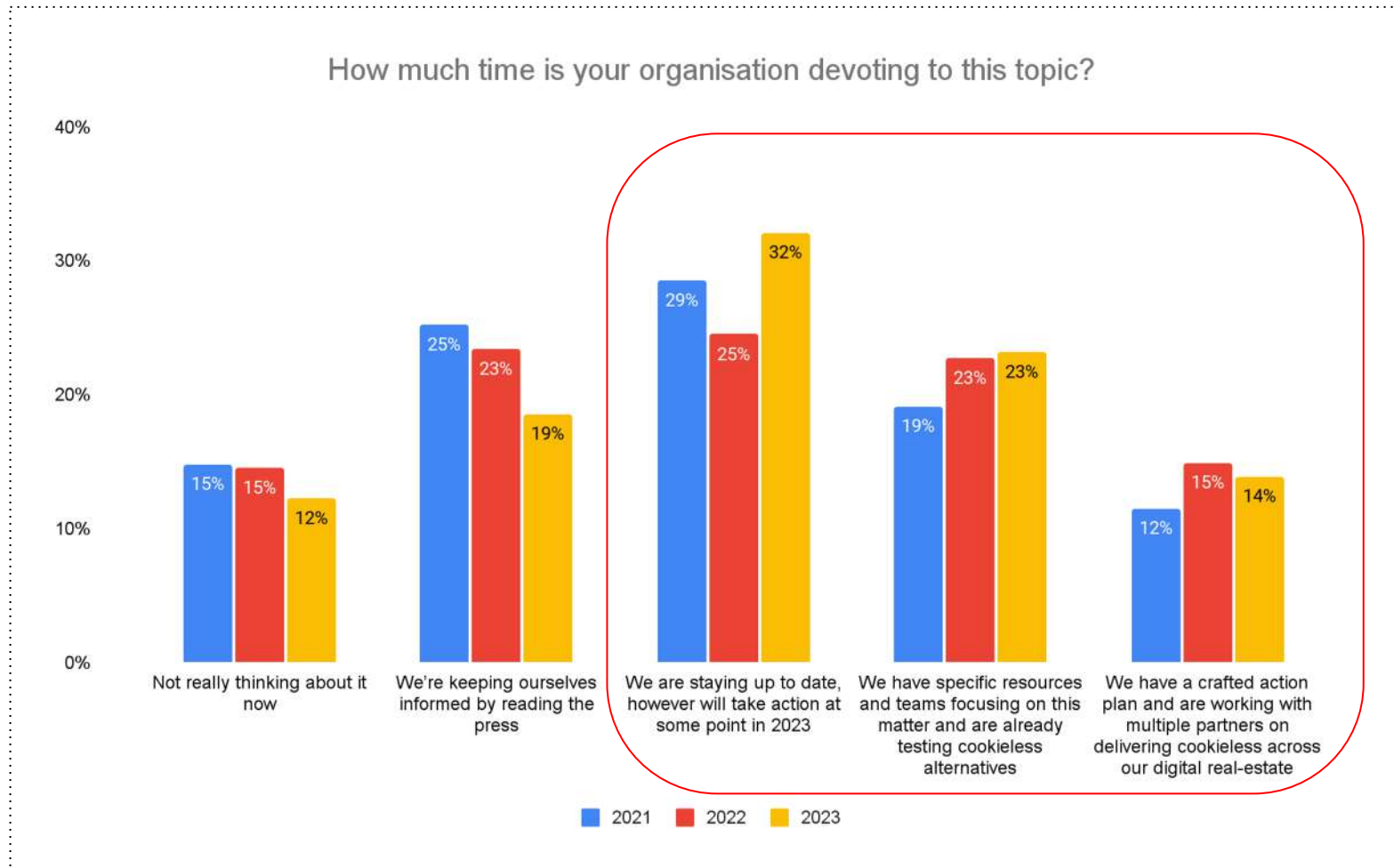
The Global Media Platform & leaders in Cookieless
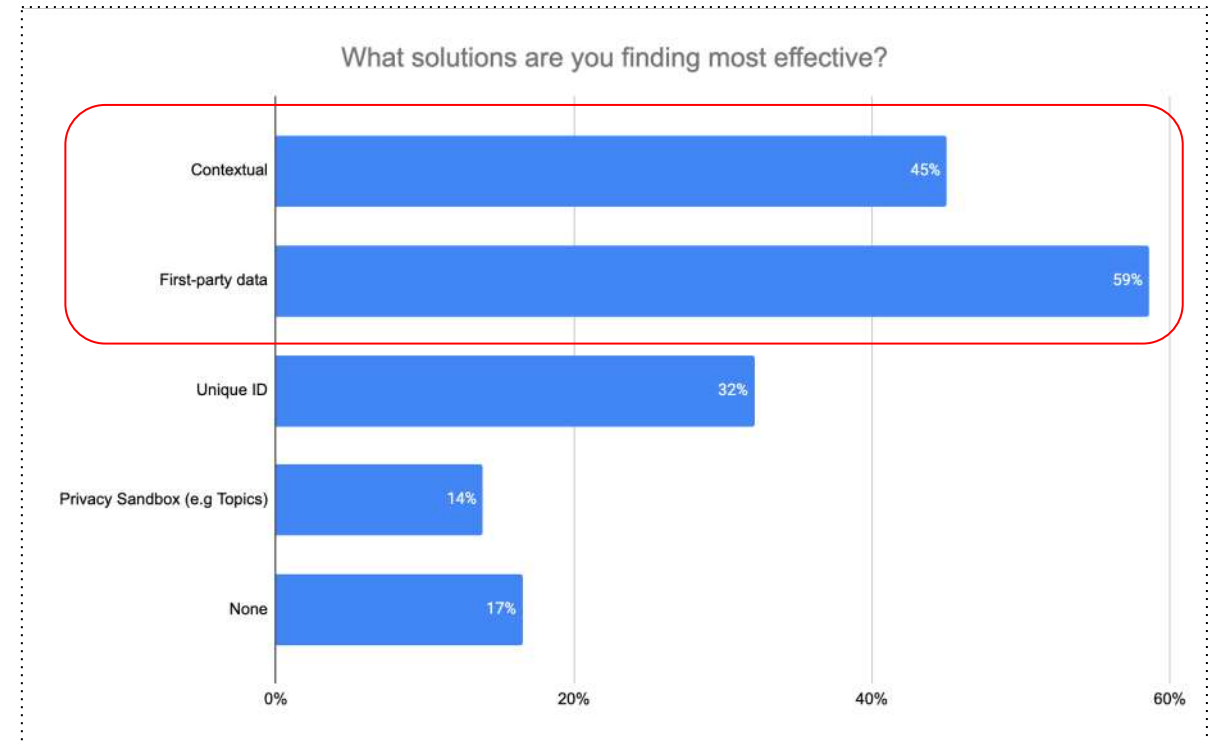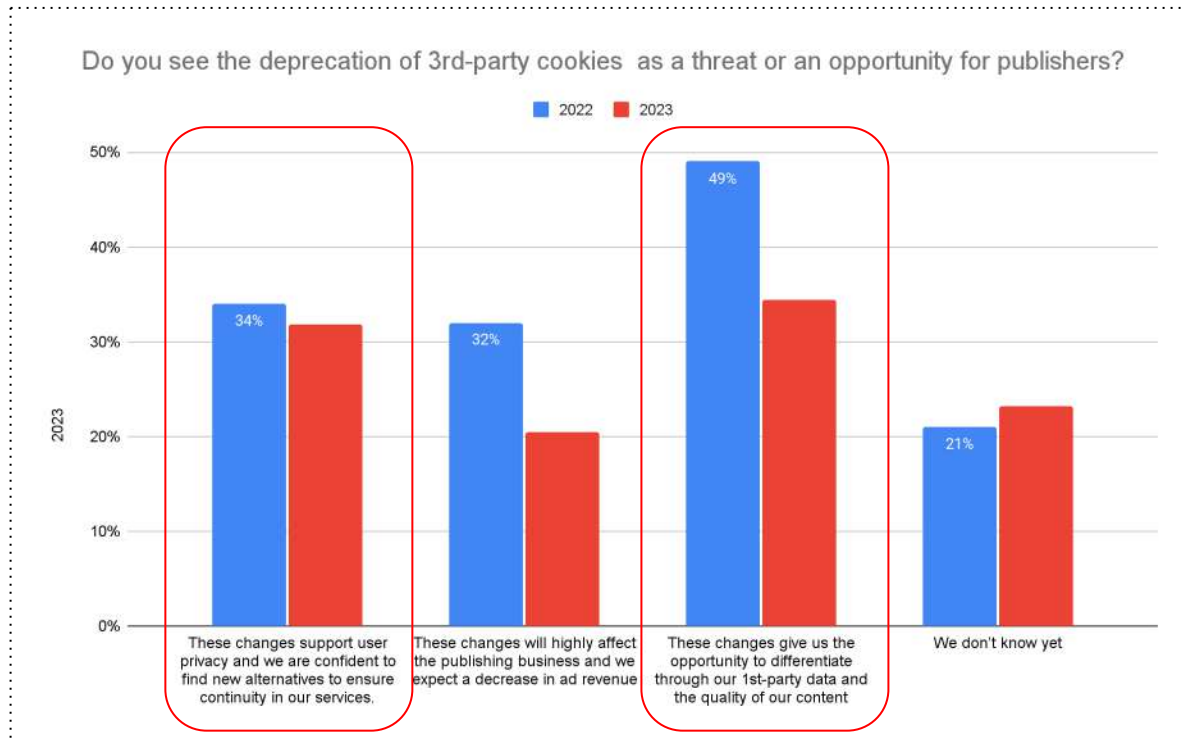
3rd annual survey

Over 300 respondents

49 countries

Teads

70% of publishers are aware but are unsure & confused

How would you rate your knowledge on today's cookieless world?

69% of publishers <u>will take action</u> in 2023

How much time is your organisation devoting to this topic?

Legend: 2021 (blue), 2022 (red), 2023 (yellow)

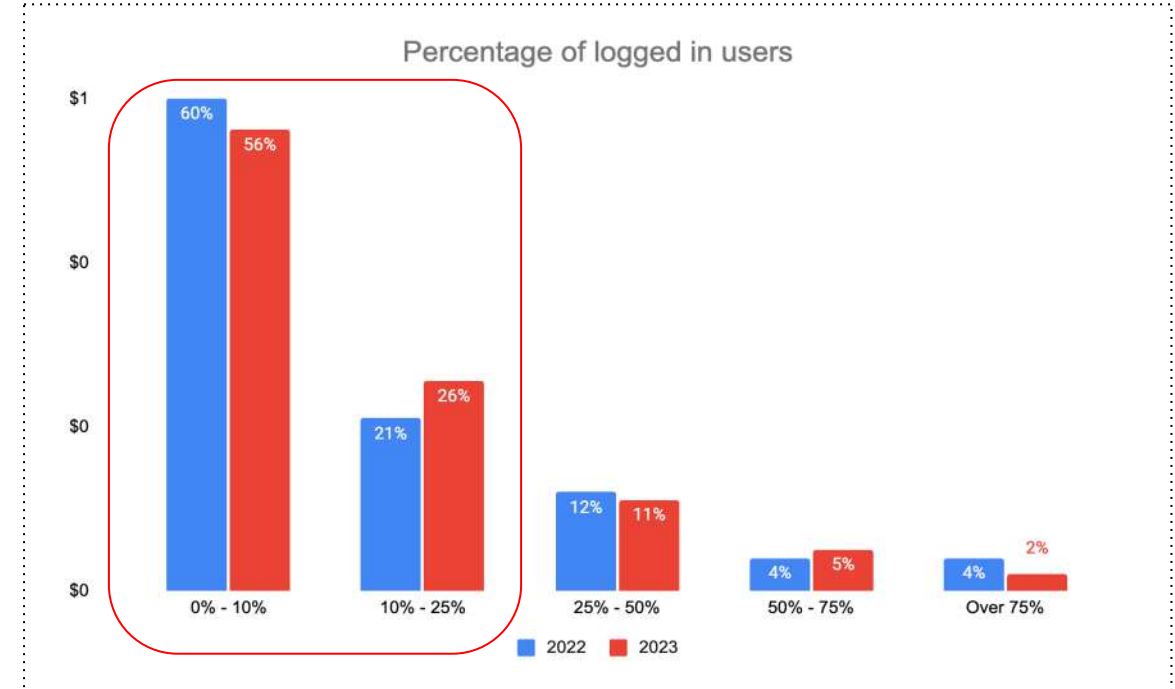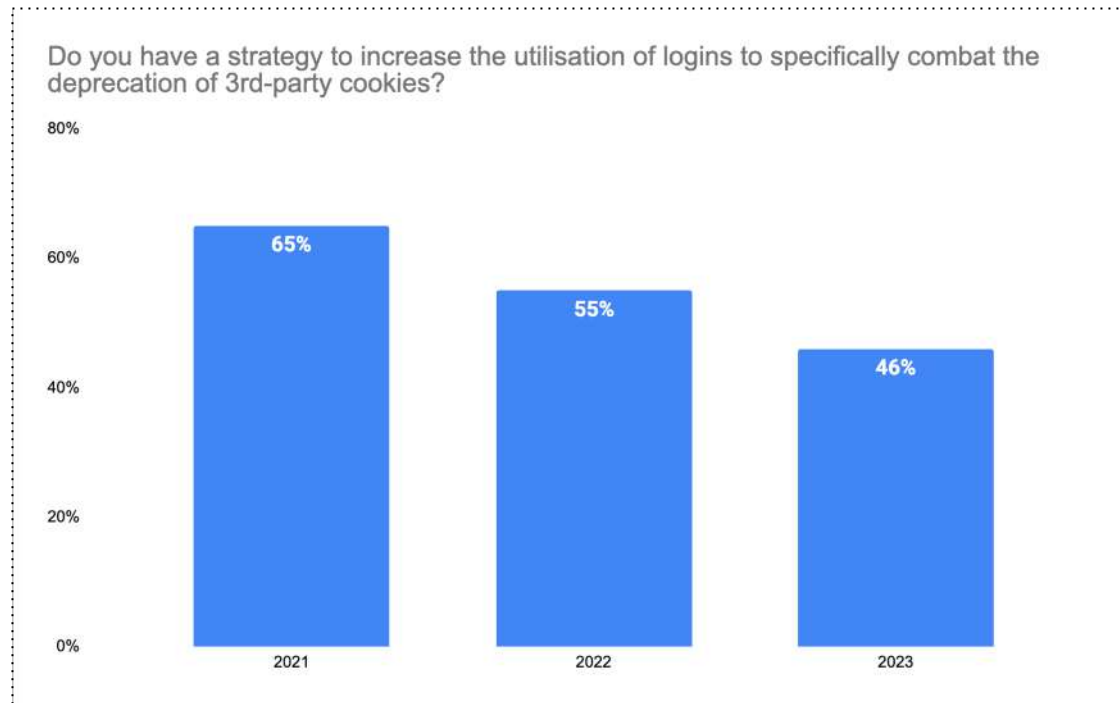| Category	2021	2022	2023
Not really thinking about it now	15%	15%	12%
We're keeping ourselves informed by reading the press	25%	23%	19%
We are staying up to date, however will take action at some point in 2023	29%	25%	32%
We have specific resources and teams focusing on this matter and are already testing cookieless alternatives	19%	23%	23%
We have a crafted action plan and are working with multiple partners on delivering cookieless across our digital real-estate	12%	15%	14%

Teads

66% of publishers in 2023 are feeling positive

Context and **First party data** are their key battlegrounds

55% of publishers do not have a login strategy
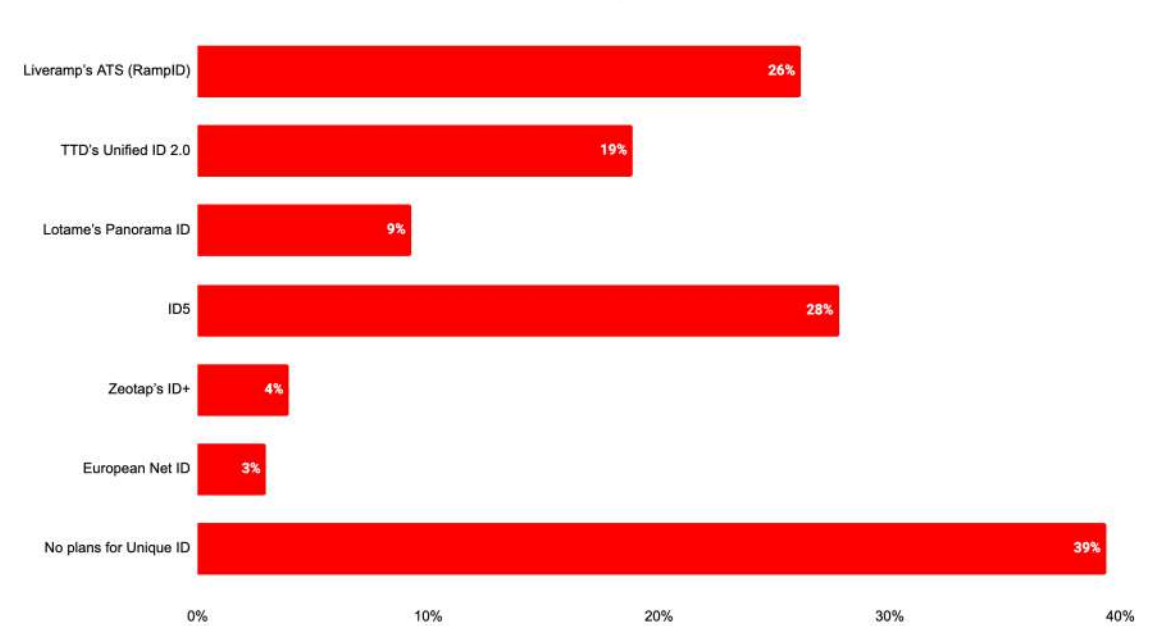

Do you have a strategy to increase the utilisation of logins to specifically combat the deprecation of 3rd-party cookies?

Percentage of logged in users

82% of publishers have less than 25% of users logged in

Teads

70% are concerned about UX and loyal users

What do you consider your biggest challenge to propose, or increase, the adoption of logins?

The potential disruption of user experience	38%
The potential impact on loyalty/traffic	33%
To test and monitor the impact of login utilization in terms of inventory monetization capabilities	25%
Login incentives could conflict with my subscription-based business	15%
The technical implementation and management of logins	21%
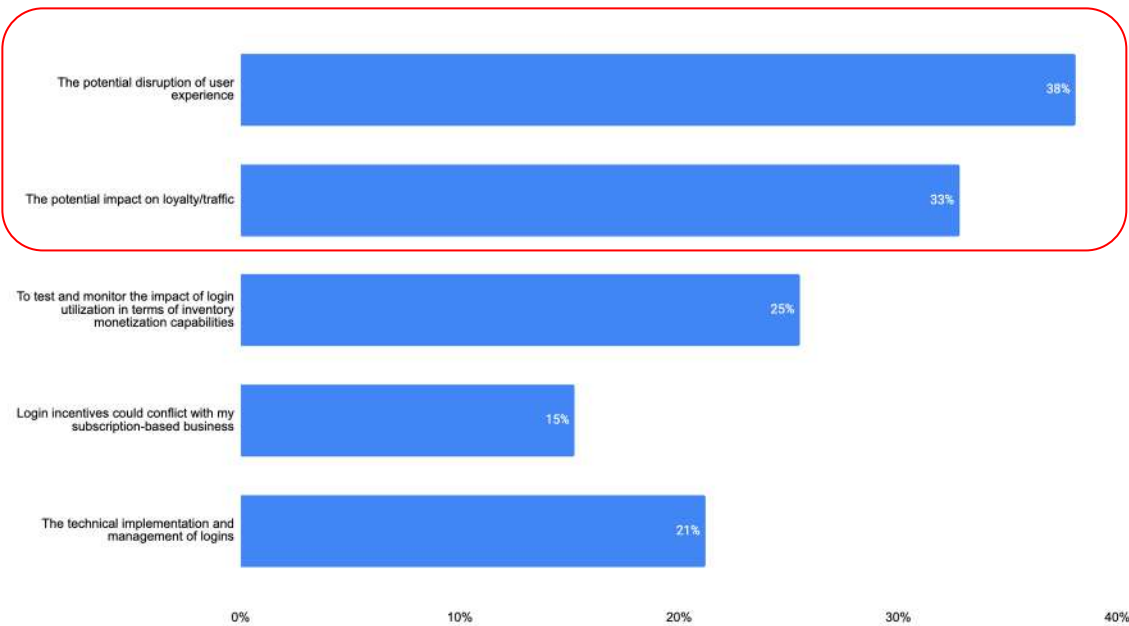
Is there a specific Unique ID partner that you favour or intend to work with?

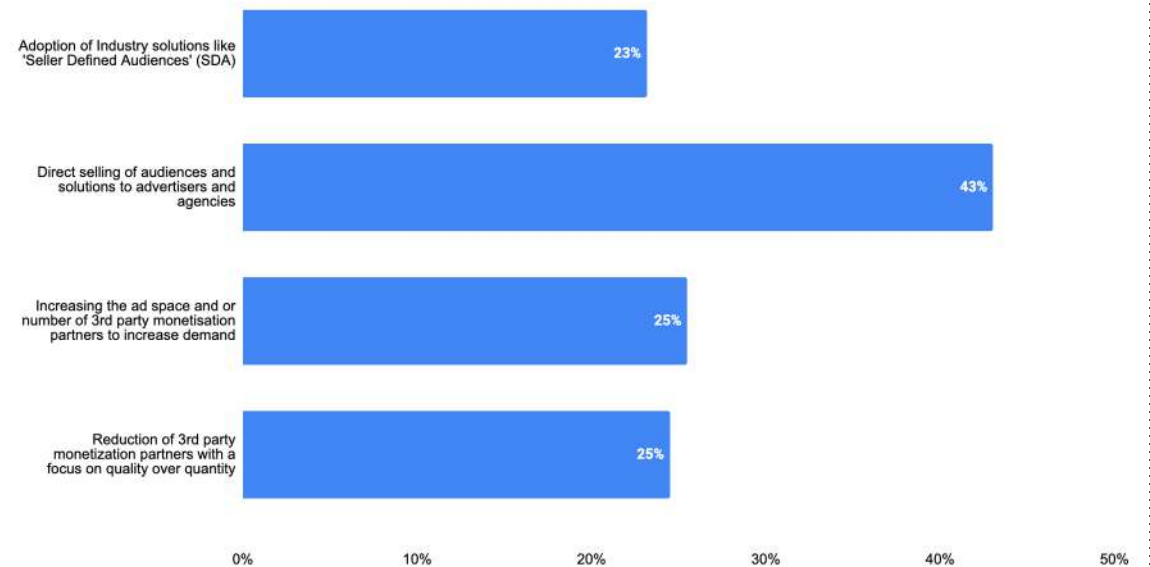|	
Liveramp's ATS (RampID)	26%
TTD's Unified ID 2.0	19%
Lotame's Panorama ID	9%
ID5	28%
Zeotap's ID+	4%
European Net ID	3%
No plans for Unique ID	39%

There is no single standout partner to work with

Teads

Publishers are caught in two minds

What data are you prepared to share with 3rd party tech partners if it allows greater monetization?

URL	45% (2022) / 55% (2023)
Mobile Advertising ID	49% (2022) / 35% (2023)
User IP	33% (2022) / 27% (2023)
Your 1st-Party Cookie ID	18% (2022) / 38% (2023)
Your 1st-party data (e.g: subscriber profile)	31% (2022) / 26% (2023)
Unique IDs (TTD, Liveramp etc)	31% (2022) / 37% (2023)
None	31% (2022) / 10% (2023)

0% 20% 40% 60%

■ 2022 ■ 2023
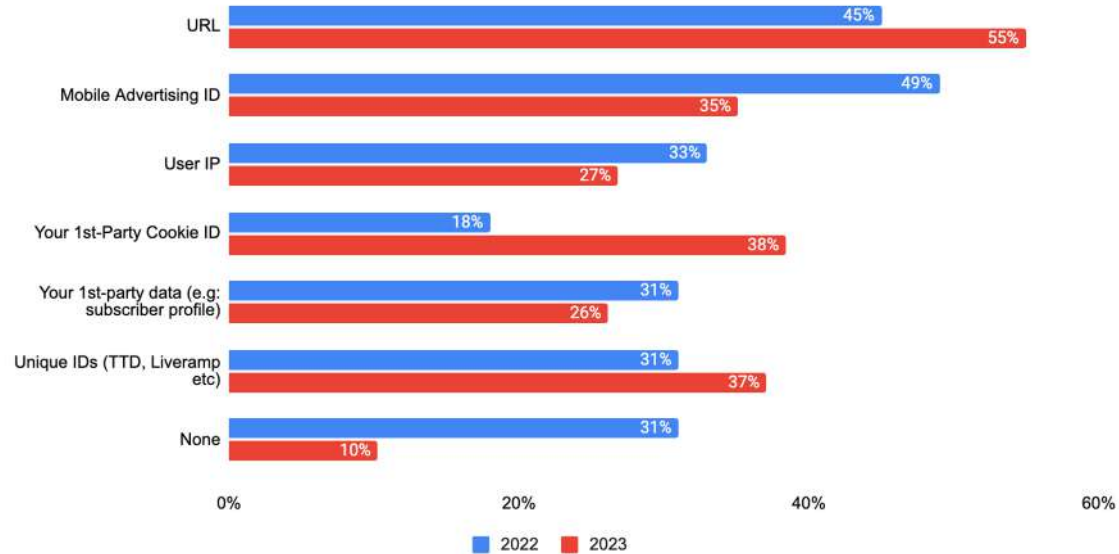
Which strategies are you looking at in 2023 to better monetise your business' 1st party data?

Adoption of Industry solutions like 'Seller Defined Audiences' (SDA)	23%
Direct selling of audiences and solutions to advertisers and agencies	43%
Increasing the ad space and or number of 3rd party monetisation partners to increase demand	25%
Reduction of 3rd party monetization partners with a focus on quality over quantity	25%

0% 10% 20% 30% 40% 50%

Teads

Key takeaways

1. Publisher awareness is high but there is still a lot of **confusion**

2. If they have not taken concrete action already, they will do in H2 2023

3. Publishers are focusing on content and 1st party data as this is their core strength; getting signed in users is not

4. They are both willing to share with 3rd parties for more revenue and seeing this as a chance to grow direct relationships

5. Now is the time to clarify the ask, define the values and make the supply ready for cookieless

Teads