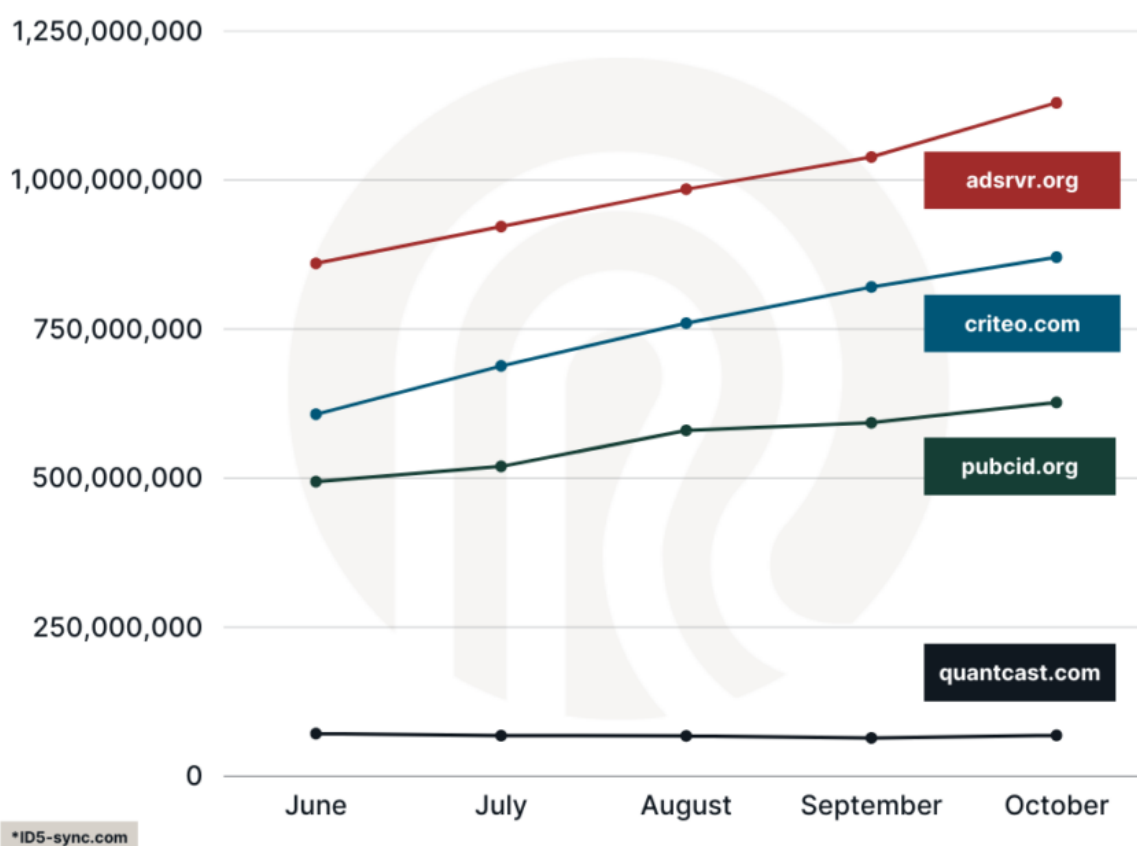


A European Universal ID Tracker

MAIDs and third-party cookies are on their way out, so what is the status of the various universal ID solutions? We took a look at the EU auction data to find out what is happening with universal IDs (also called "extended IDs," "shared IDs," or "salted hash email tokens").

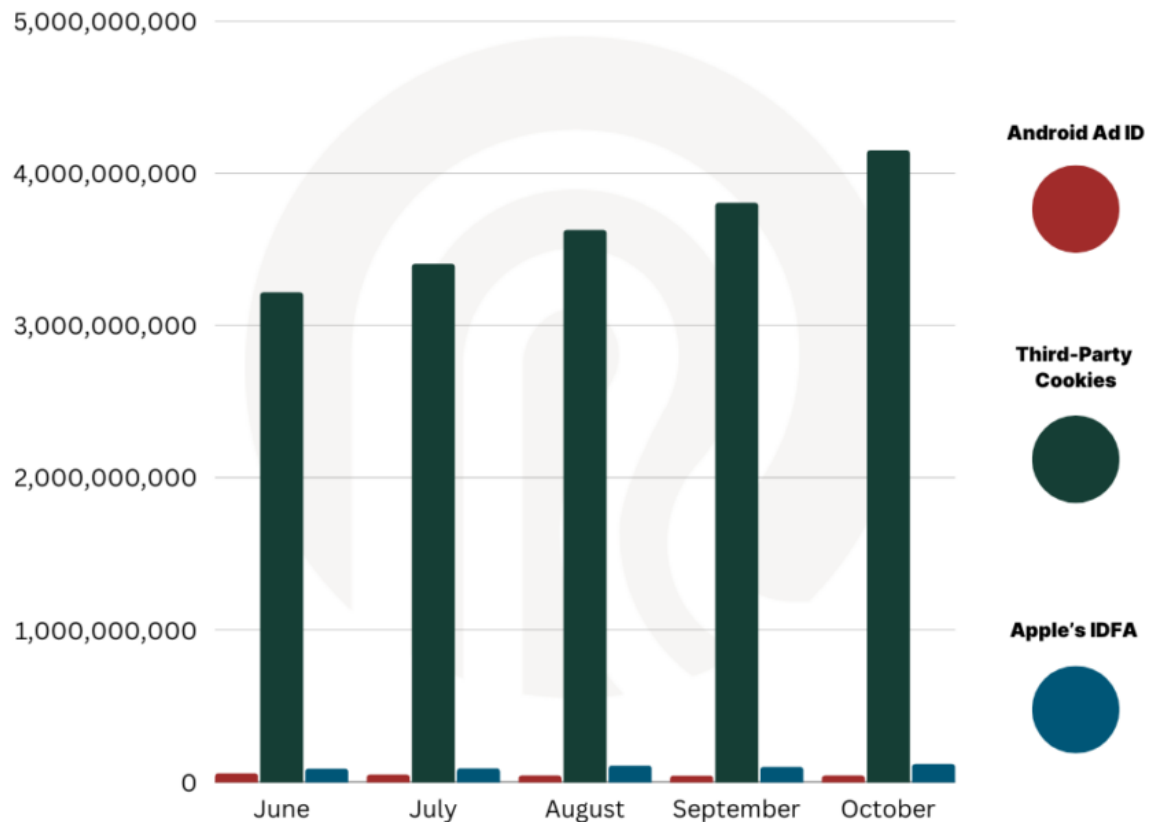
Here are some of our observations of ID volumes, players, types of deterministic data, and some possible explanations behind the trends.

Graph A displays the top 5 European Universal IDs (by volume) observed in the bidstream | June – October 2022



** We removed ID5-sync.com data from the report because we can't get a precise number of how many people are represented by ID5 IDs listed in the bidstream (due to the encrypting strategy). We plan to add ID5 back in a future update when we look at the number of bid requests per identifier that we see in a given time period.*

Graph B shows the types of deterministic data tied to extended IDs observed in the European bidstream | June – October 2022



(C) Regard data published November, 2022

Discussion

The most prominent identifiers by volume in Graph A:

adsrvr.org (TheTrade Desk) – 1.1 B

criteo.com – 870 M

pubcid.org (Prebid) – 626 M

quantcast.com – 67 M

- Extended IDs (also called Universal IDs or Hashed Email tokens) are trending up and to the right, averaging a 23% increase. We expect the trend to continue.
- Obviously the deterministic data set is dominated by third-party cookies.
- Note that a Publisher can set 20 third-party cookies per page/per user if they like, and we would see them all in the bidstream.
- Note that mobile advertising identifiers are limited to one at a time.
- There are more publishers using Prebid (pubcid.org) right now. Prebid allows publishers to use more than one identifier on the same page at the same time.
- Why use several different IDs at once? Big publishers are probably covering their bets to make sure their inventory is being used.
- The so-called third-party cookie apocalypse didn't happen, it's postponed until 2023, perhaps longer, so identity providers are probably using third-party cookies and syncs extensively as long as they're available.
- Yes, third-party cookies are being used to prepare for the cookie apocalypse.
- All of these identity providers are using third-party cookies as a crutch to get their ID out there before they're deprecated in Google Chrome.
- No one knows who will win the identifier competition. Right now it makes sense to work with several at a time just in case.
- It appears that the publisher ID problem in mobile is not being solved with a single or small group of universal IDs.
- We expect to see more techniques that are preparation for the big cookie apocalypse, similar to what we're seeing with pubcid.org and publishers using multiple identifiers per page.
- Accordingly, we expect to see some movement in data volumes amongst the identifier providers. The top 5 by volume probably won't change in the near term, but the next 10 could see some movement.

There are three main buckets of identifiers:

#1 – Bucket A: Partner and time stamp encrypted, which is helpful for capturing revenue for the provider. They're designed to make the advertiser pay [and why not, money makes the world go 'round.]

#2 – Bucket B: Partner specific encryption. Think UID 2.0 in the US (not yet available in the EU), and NetID in Germany. The design is focused on user privacy protection.

#3 – Bucket C: Unencrypted IDs. Think Lotame's Panorama or Criteo. Why do they offer an unencrypted ID? In Criteo's case, they want to use it themselves! They don't care if others use it. They want to bid on ads and they do a lot of it. The other reason for an unencrypted ID is that the provider wants to give the internet a transactable currency. If you leave it unencrypted, then maybe it'll drive usage.

The full list of identifiers observed in the European bidstream:

33 Across.com

adnews.com

adobe.com

adserver.org

aol.com

beeswax.com

britepool.com

identitylink

idfv.roq.ad

invibes.com

krux.com

mediamath.com

nestid.de

neustar.biz

parrable.com

pubcommon

pubmatic.com

rubiconproject.com

sharedid.org

smartadserver.com

sovr.com

tdid