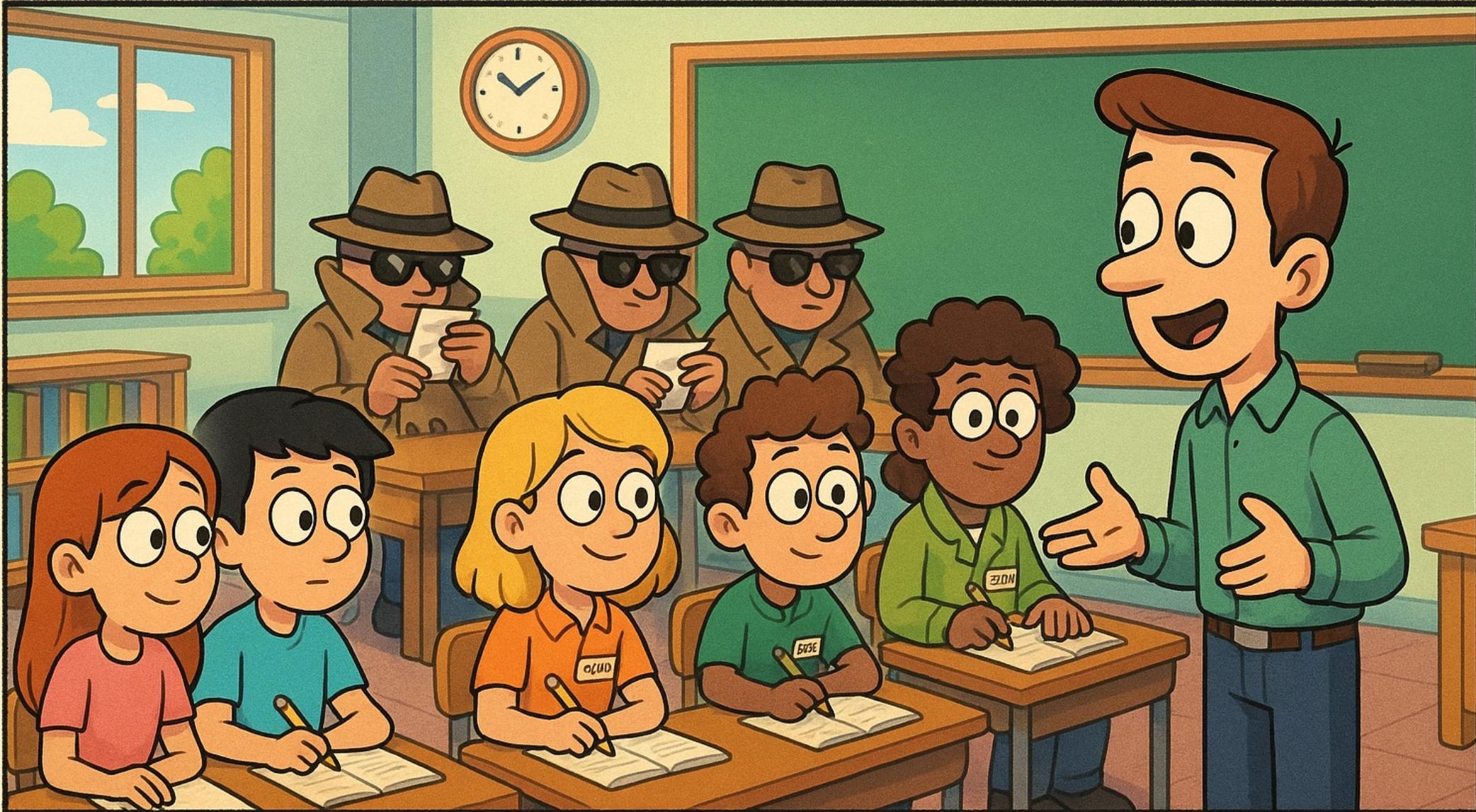# Beyond the Cookie: The Future of Programmatic Identity and Signal Integrity

Finley Matheson | Regional Account Director (Adform)

July 2025

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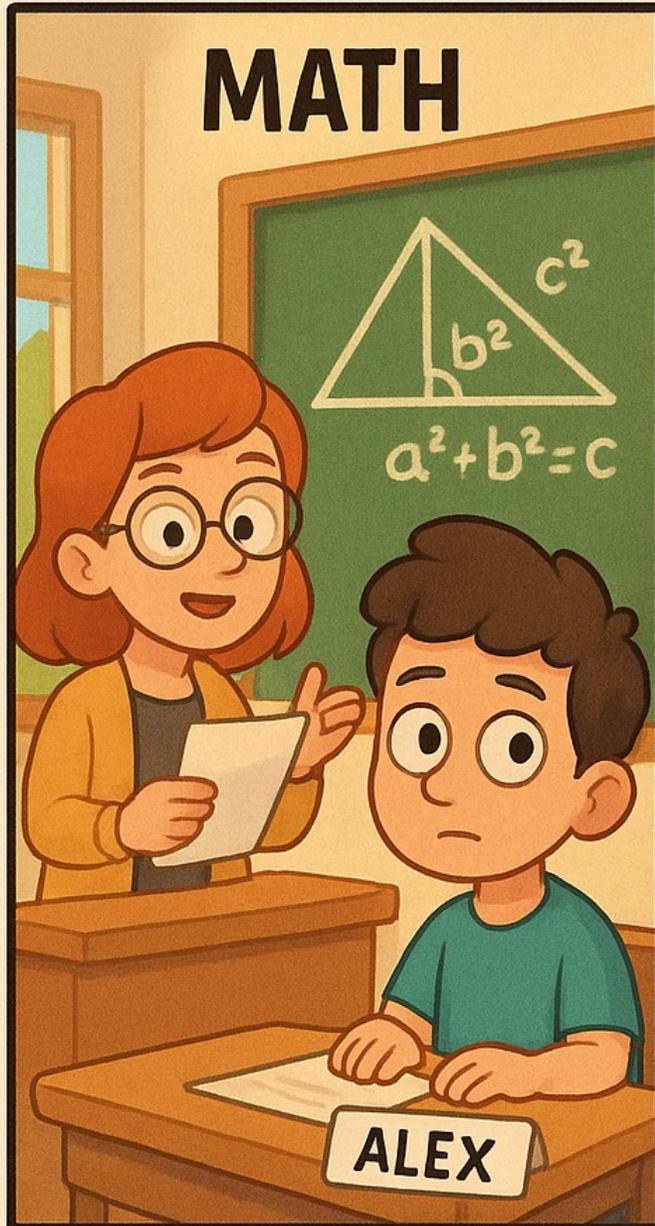# THE OLD DAYS
A BUSY CLASSROOM

What this means for Australia today across the open web

Insights from the Bid Stream - Australia

43%
of requests DO NOT include a 3P cookie

87%
Of the bid stream includes alternative IDs

2.4
alternative ID providers shared per bid request*
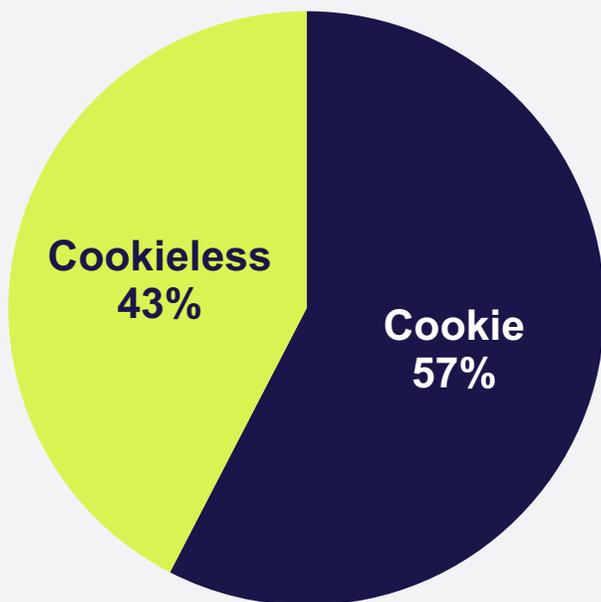
81
Unique identifiers observed[3]

Adform DSP – analysis of the bid stream – June 2025

Welcome to the **Multi-ID** world

*Bids with at least one first-party ID shared 3-more than 0.01% of the bid stream

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1.The Share of Cookieless

Presence of a third-party cookie

Cookieless
43%

Cookie
57%

Global Avg. cookieless 41%

Presence of a cookie by browser type

User opt-out

| 73% | 27% |

User opt-in

| 17% | 83% |

iOS

■ Cookie ■ Cookieless

Adform DSP – June 2025– bid landscape

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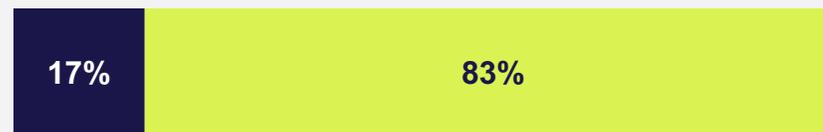
1.The Share of Cookieless

Cookieless by country

Country	%
Norway	69%
Denmark	68%
Switzerland	62%
Sweden	55%
Finland	51%
Germany	50%
Netherlands	48%
Austria	47%
United Kingdom	45%
Czech Republic	44%
Belgium	44%
Luxembourg	43%
Australia	43%
Turkey	41%

Country	%
New Zealand	40%
United States	39%
Lithuania	38%
Estonia	38%
Italy	37%
South Africa	37%
Canada	36%
France	35%
Latvia	34%
Poland	31%
Spain	29%
Hungary	28%
Greece	28%
Brazil	26%

Global average
41%

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2. The scale of first-party ID(s) in the bid stream

Overview

% of bids
with alternative ID(s)

87%
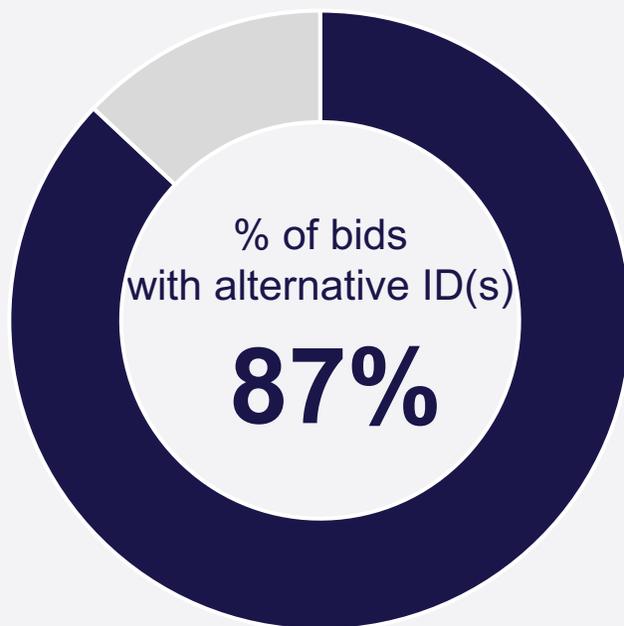
Global avg. 80%

Presence of alternative ID(s) when…

Browser is opt-in by default

89%

Global 78%

Browser is opt-out by default

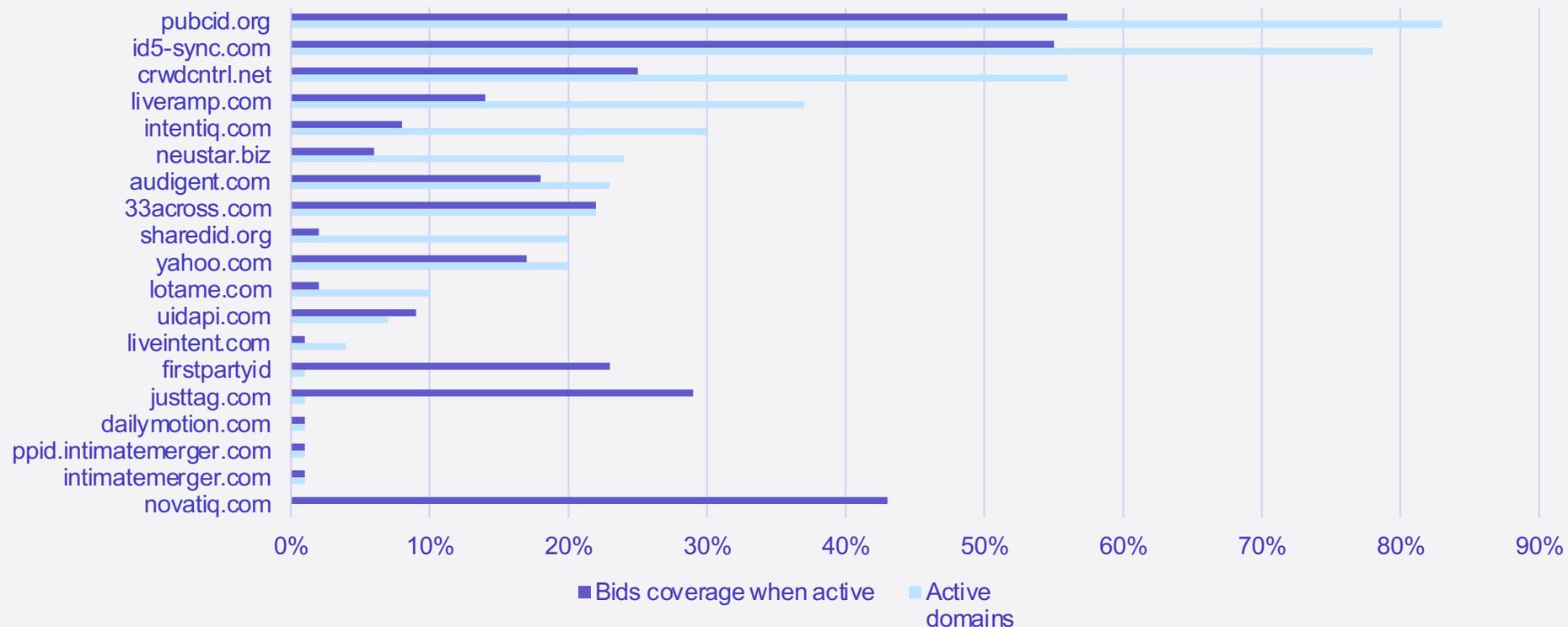**83%**

Global 83%

Alternative IDs per Bid

30%

20%   20%

12%   17%

| 1 ID provider | 2 ID providers | 3 ID providers | 4 ID providers | 5 & more |

Adform DSP – June 2025 – bid landscape – browser traffic
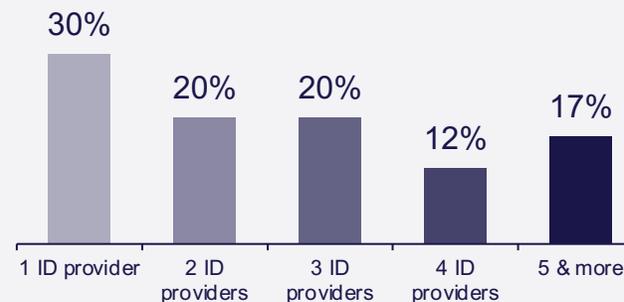
adform

3. A dense and diverse network of first-party ID providers

Top open first-party ID providers and profile

Bar chart showing bid coverage when active and active domains by provider:

Provider	Bids coverage when active	Active domains
pubcid.org	~56%	~83%
id5-sync.com	~55%	~78%
crwdcntrl.net	~25%	~56%
liveramp.com	~14%	~37%
intentiq.com	~8%	~30%
neustar.biz	~6%	~24%
audigent.com	~18%	~23%
33across.com	~22%	~22%
sharedid.org	~2%	~20%
yahoo.com	~17%	~20%
lotame.com	~2%	~10%
uidapi.com	~9%	~7%
liveintent.com	~1%	~4%
firstpartyid	~23%	~1%
justtag.com	~29%	~1%
dailymotion.com	~1%	~1%
ppid.intimatemerger.com	~1%	~1%
intimatemerger.com	~1%	~1%
novatiq.com	~43%	

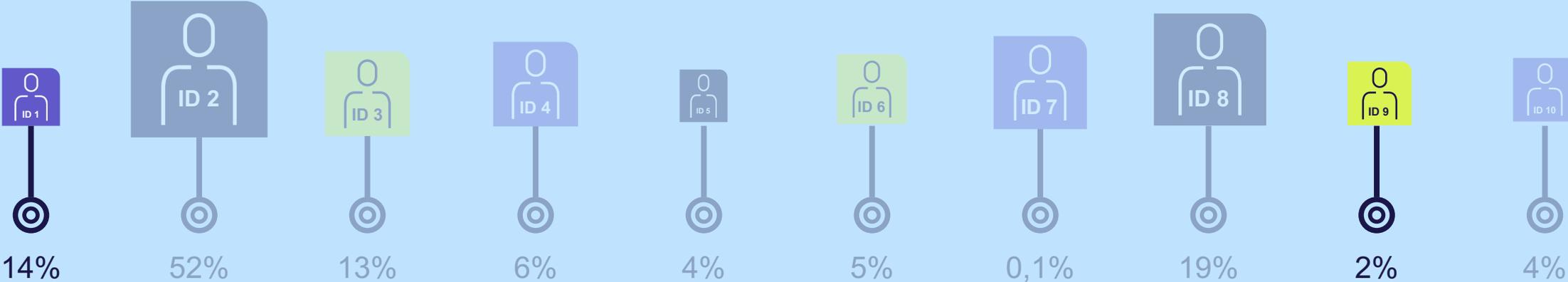■ Bids coverage when active   ■ Active domains

Adform DSP – June 2025 – bid landscape excluding apps – average on top 1000 domains

13

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Navigating Identity Fragmentation

Adform's approach
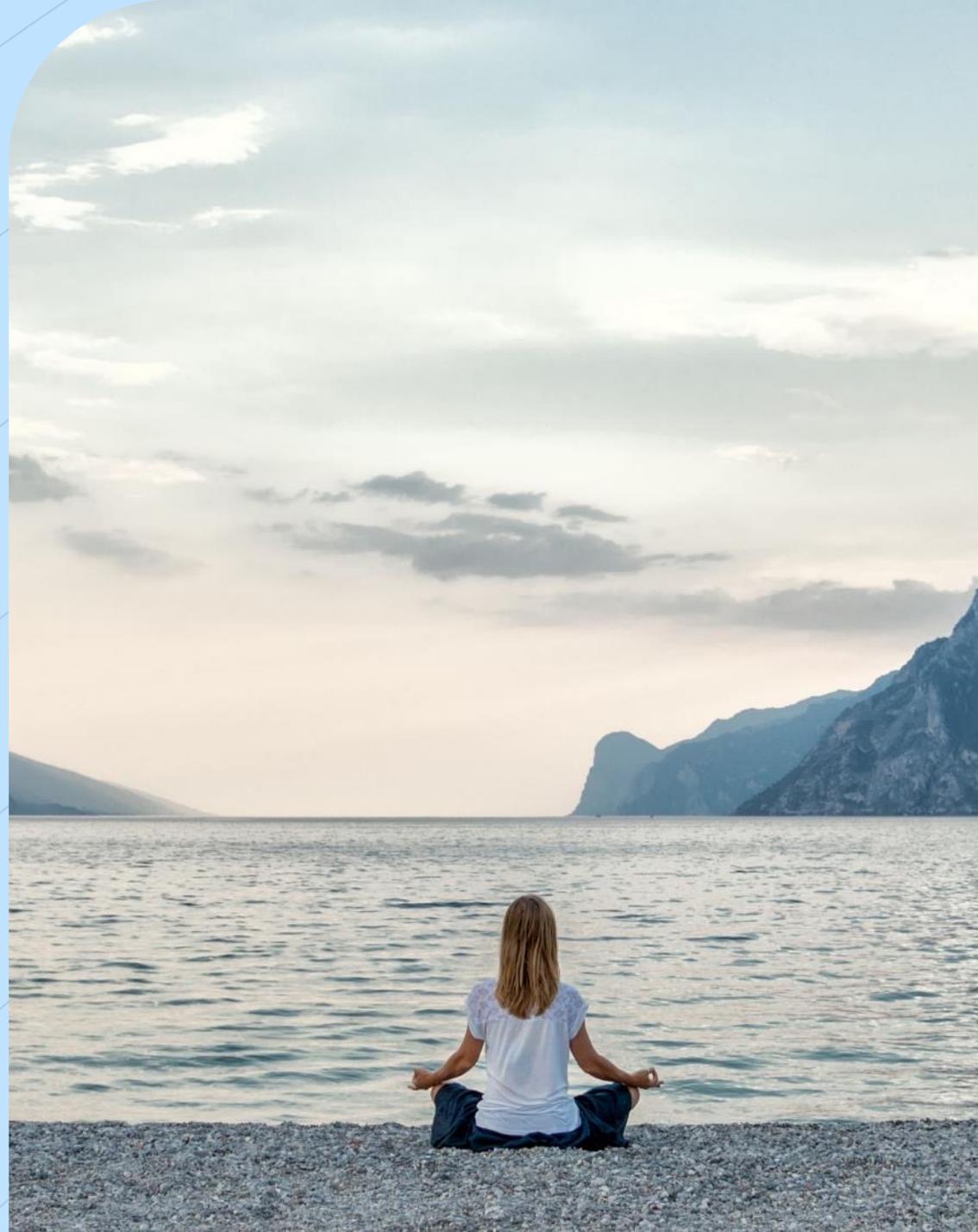
There is no winner takes all ID in Identity's future

14%   52%   13%   6%   4%   5%   0,1%   19%   2%   4%

Being forced to choose just one or two makes attaining the reach & frequency you need impossible

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ID5

netID

neustar

nova⟡tiq

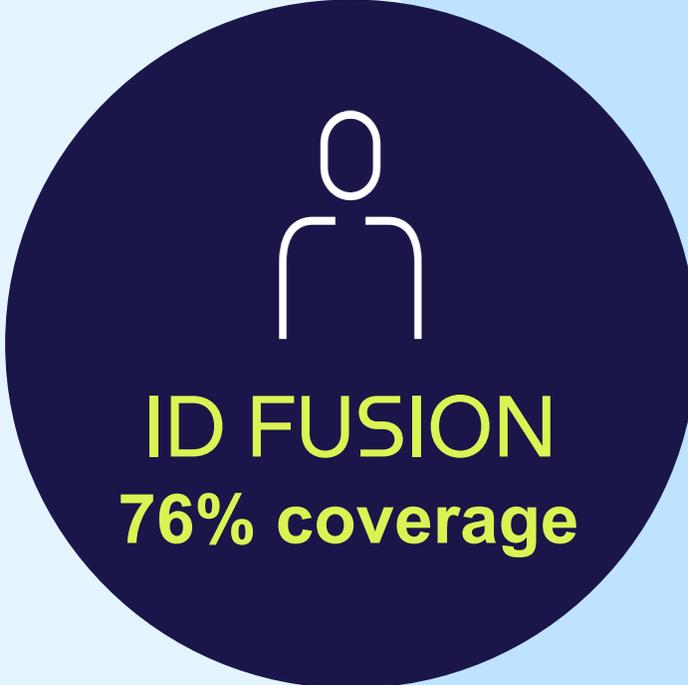UtIQ

Publishers IDs

Schibsted SEZNAM.cz sanoma

LiveRamp

justID

first-id

LOTAME
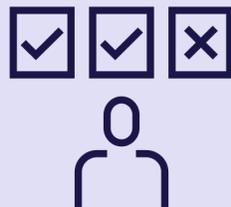PANORAMA ID

Prebid

ID FUSION
76% coverage

Bringing clarity to a fragmented Identity Landscape

ID Fusion currently supports 45+ IDs to drive **performance** and **reach** on third-party cookies, first-party IDs, in cookieless and beyond.

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Panel: The Future of Programmatic Identity and Signal Integrity

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Regional Account Director APAC
Adform

Aimee Gossage

Head of Investment
Audience Group

Jerome Velasquez

Head of Product & Technology
ADMATIC ANZ

Moritz Von Sanden

Head of Sales
Audience360

Alex Cujko

Platform Solutions Consultant
Adform

adform

Yango teams up with Adform and Audience360 to drive impactful results for Automotive Brand

yango **Audience360** **adform**

Results: Looking to disrupt the Australia Auto landscape, Yango, Audience360 and Adform partnered together to drive increased brand awareness, website traffic and sales for fast growing automotive manufacturer. Audience360's in-market data enriched by ID Fusion, helped fuel a cross-channel strategy that delivered smarter, more effective campaigns with measurable impact, to significantly scale the business!

118%
User increase on site
(Jan-24 vs Jun-24)

56%
Display engagement growth
(Jan-24 vs Jun-24)

26%
Surge in YoY unprompted awareness
(May-23 to May-24)

10.5%
Of exposed audiences booked a test drive

"Audience360's partnership with Adform has transformed our approach to targeting in-market audiences, allowing us to reach specific audiences across devices and channels, significantly improving engagement and conversions, making this partnership invaluable"

Dylan Sargant, Associate Media Director, Yango
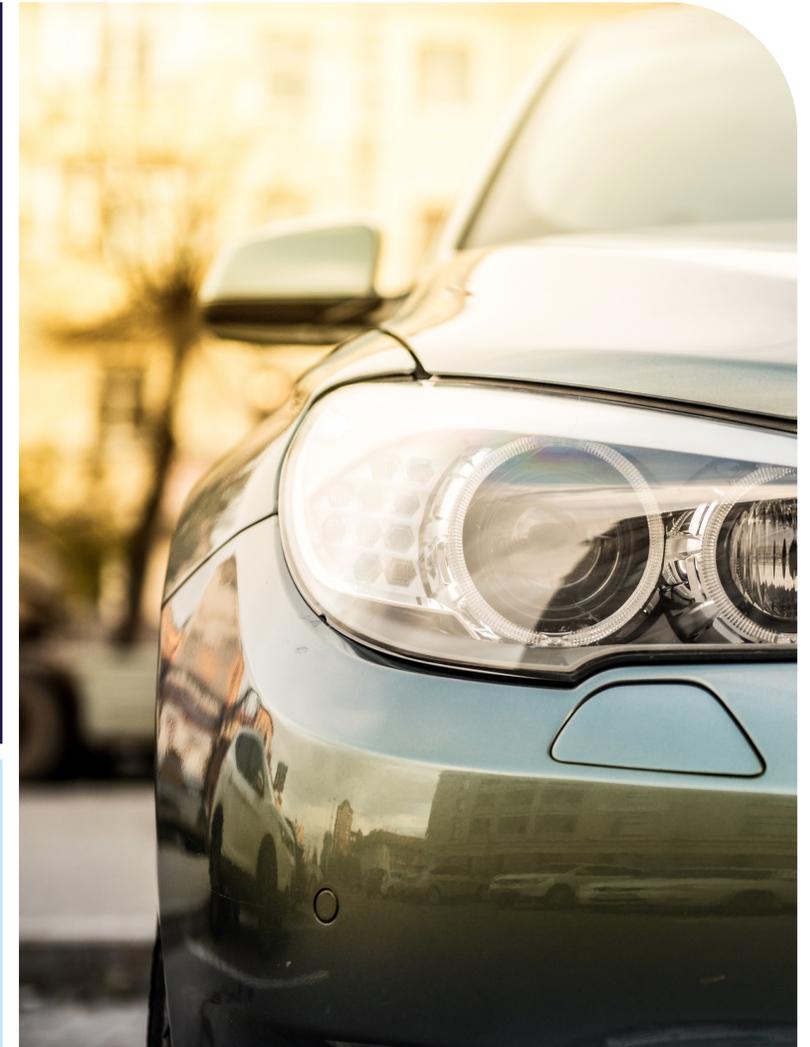
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Thank you!

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Change the game