Optimizing First-Party Data for Publishers & Advertisers

How publishers are using first-party data to improve addressability and privacy

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Introduction

Optimizing First-Party Data for Publishers and Advertisers Study

This study conducted by Digiseg and AdExchanger analyzes how top publishers are using first-party data to improve addressability and privacy – and drive more advertising revenue and campaign success. The study establishes benchmarks for first-party data addressability, scalability, and privacy issues. Also included is the value of tracked and untracked data solutions, the use of granular neighborhood and household level audience data, and other key opportunities related to these issues.

Specifically, the report offers insights and benchmarks across the range of digital publishing and advertising initiatives including:

- Publishers' biggest digital inventory challenges and goals

- eCPM Pricing benchmarks

- Industry knowledge of untracked audience solutions

- Data privacy issues and responses

- Various audience solution ratings by publishers

The analysis is based on a survey of leading publishing executives in both consumer and business markets serving a range of industry sectors. The survey was conducted in June and July of 2023 and received 103 responses.

Digiseg and AdExchanger thank all the respondents for their invaluable contribution to the study.

Executive Summary

Privacy and addressability are the defining digital publishing and advertising industry issues of this decade. The promise of digital publishing and advertising, the ability to customize content and messaging to large groups at scale down to small segments and even individuals, hasn't worked out as first envisioned. The key roadblock is audience and consumer demand for privacy and control over their data. Different technologies, platforms, and data collection and housing methods, tracking prevention in browsers, and low consent levels – along with changing regulations around the world – have made these issues even more challenging for publishers and advertisers.

This study has quantified these challenges, and the top three key issues are tracking prevention in browsers (according to 64% of publishers), privacy legislation (53%), and low audience match rates (40%). These are not only operational and service challenges, but they are also negatively impacting advertising revenue.

Today, after years of dealing with many of these issues, publishers say there is still significant need for new data, addressability and privacy solutions. In particular, publishers want better privacy-first digital advertising solutions with a focus on audience addressability and matching at scale while protecting consumer privacy. Most importantly, publishers need digital advertising solutions that build and maintain trust to ensure audiences the privacy protections they demand.

> **A key finding is that a significant 84% of publishers say existing audience targeting solutions are either not covering their needs or that there's room for improvement.**

The promise of digital publishing and advertising is still very much alive, yet many of the issues, challenges and opportunities are likely to remain in flux for years. This study provides the industry with new research insights and benchmarks on how publishers are using first-party data to improve addressability and privacy. Some of the key insights from the study are provided in this Executive Summary.
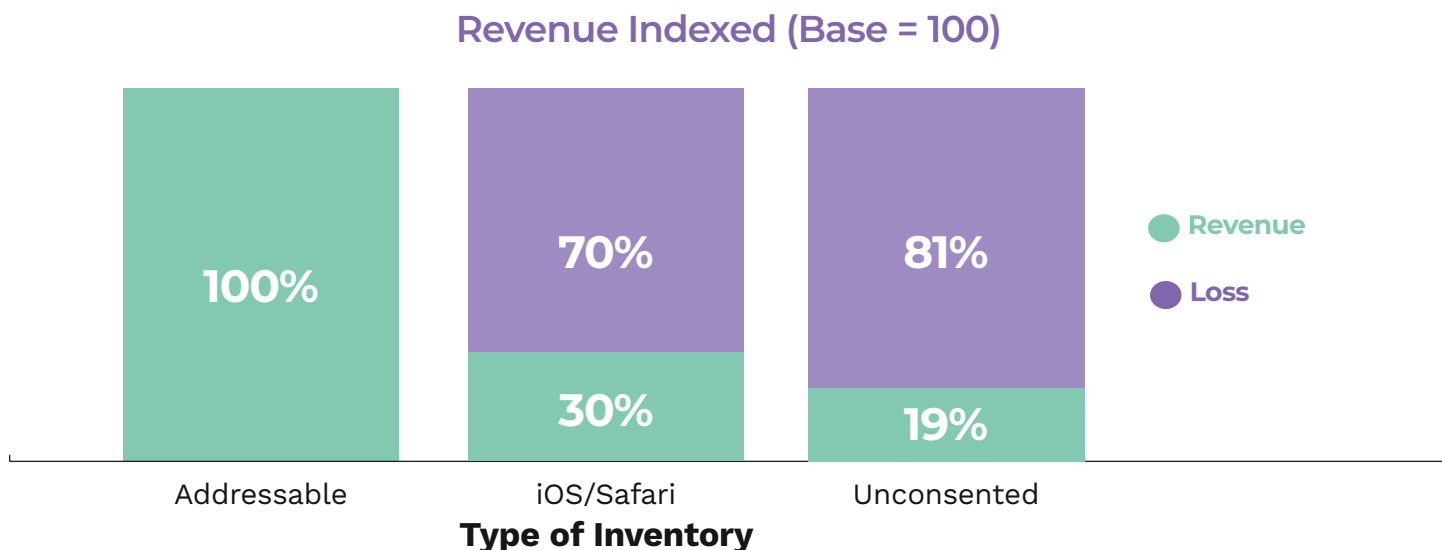
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> **Key Insight #1** There's a wide eCPM revenue gap between publishers' addressable inventory and iOS/Safari and unconsented audiences. Publishers' eCPMs suffer when consent is missing or visitors use iOS/Safari.

iOS/Safari anonymous and unconsented visits mean significantly lower eCPMs for publishers. According to the survey findings, iOS/Safari visitors on average generate an eCPM that is 70% less when compared to publishers' addressable inventory. The average unconsented visitor audience eCPM is 81% less, compared to addressable inventory, according to the findings. The bar chart below has turned these eCPMs into a comparative index with the average addressable inventory rate assigned at "100." For iOS/Safari visitors the eCPM index statistic is "30," and for unconsented traffic the index figure is "19."

Obviously, addressability is a critical issue for publishers. A number of factors tie together to put pressure on publishers' ability to drive digital advertising revenue. Low addressability, lack of audience consent, and tracking prevention combine to lower eCPM rates and drive a wide revenue gap between addressable and non-addressable audiences and inventory.

Average eCPM Comparison Index: Addressable Inventory vs. Safari and Unconsented

Publishers are effectively forced to give advertisers 70% and 81% discounts for iOS/Safari and unconsented audience inventory respectively.

Revenue Indexed (Base = 100)

| Addressable	iOS/Safari	Unconsented	
100%	70% (Loss)	81% (Loss)	● Revenue
	30%	19%	● Loss

Type of Inventory

Note: The underlying source data for this index is provided in section II. Pricing and Revenue Benchmarks.

Key Insight #2 Publishers are optimistic that audience addressability will increase over the next few years, yet with the number of industry challenges it's hard to see how that will happen.

Over the next two years, publishers expect the percentage of their inventory that is addressable to rise despite the headwinds of privacy legislation, increasing tracking prevention, cookie deprecation, and ad blockers. The survey data here shows a wide distribution, but it's important to note that a total of 56% of publishers say that half or more of their inventory is addressable today. In two years, a total of 75% of publishers expect more than 50% of their inventory will be addressable. This optimism is likely based on the hope that the data and advertising technology sectors will deliver on their promises despite the fact that most of the solutions today are still a form of consumer and user tracking with a third-party "trust" layer added between the publisher, advertiser and consumer/ site visitor.

Publishers are optimistic despite many roadblocks. Other findings in this study also suggest conflicting sentiment related to a number of key industry issues. This raises the question, is this optimism based on hope in forthcoming technology innovations or that there will be rollbacks in privacy efforts both at the regulatory and the consumer level?

Percentage of Publishers' Addressable Inventory Today and Expected in Two Years

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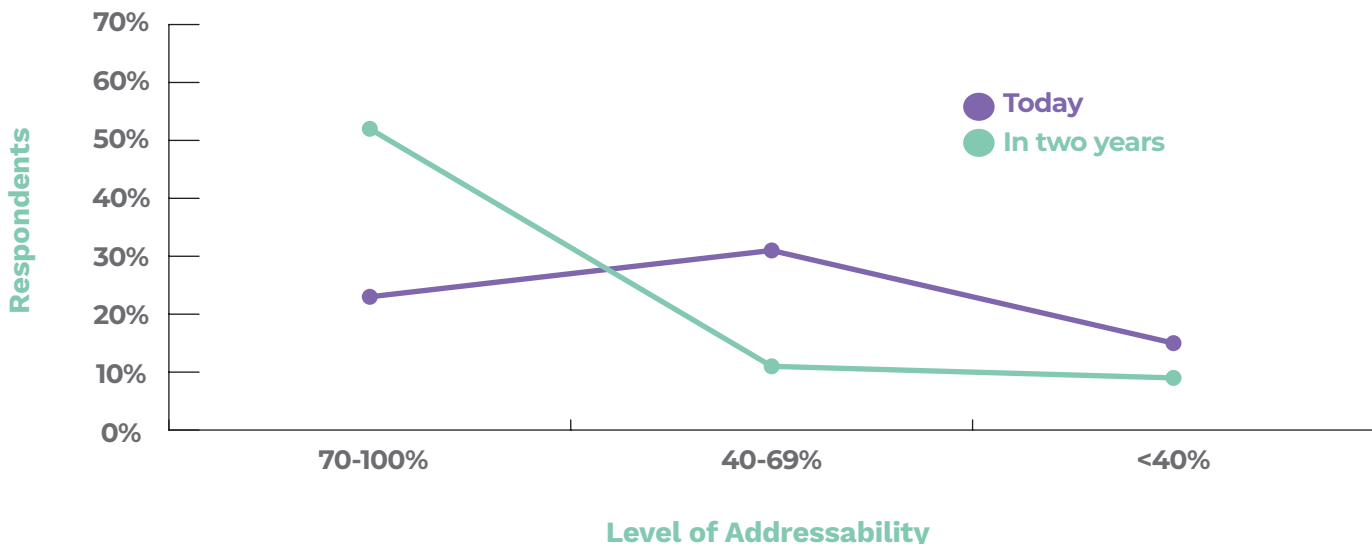
Key Insight #3 Publishers are using and testing cookie alternatives that they don't believe are very privacy safe.

Most publishers have tried, tested, or are considering testing tracking methods such as ID Solutions (82%) and Clean Rooms (70%) – but only 29% think Clean Rooms are very privacy safe and even fewer, 16% of publishers, think ID solutions are very privacy safe. This disconnect raises the question of these solutions' potential longevity especially given consumer and legislative data privacy trends. The disparity also suggests publishers feel their choices are limited but that they must "do something" and no one wants to unilaterally disarm. The paradox is that publishers expect increased addressability, but consumers and legislation is likely to dictate more privacy control.

Cookie Alternatives – Publisher Usage vs. Trust Level Disconnect

● Publishers Using/Testing/Considering

● Trust: High Privacy Level

82% 16% — ID Solutions

70% 29% — Clean Rooms
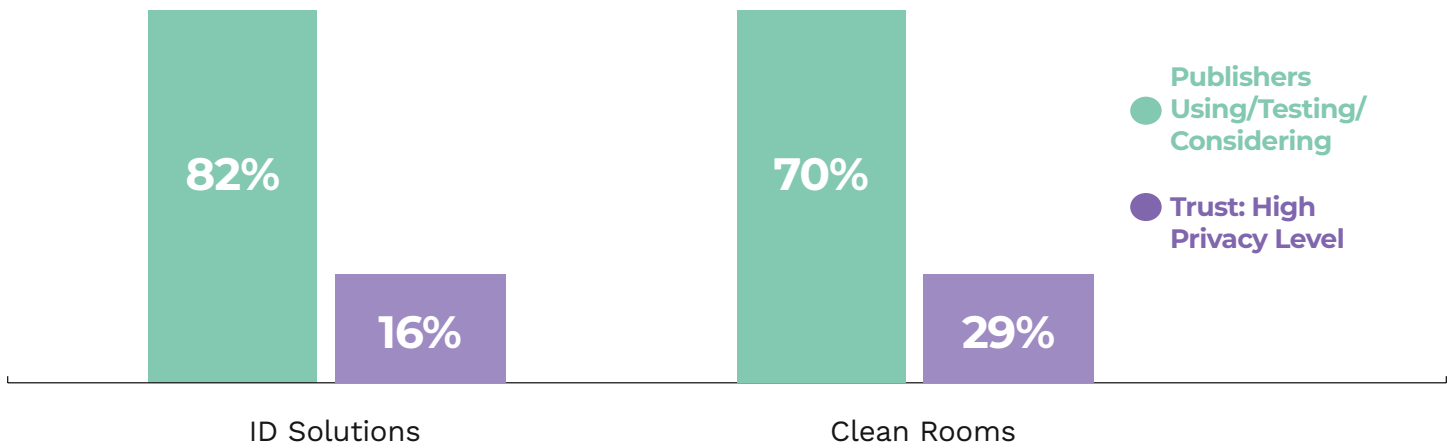
Key Insight #4 Industry knowledge of tracking-free audience solutions remains limited.

Sixty-two percent of publishers say they consider contextual targeting to be very privacy safe. But only 13% consider un-trackable neighborhood characteristics data very privacy safe. This suggests there is a misperception based on a lack of industry knowledge about the differences of various tracked and untracked solutions. That there is a lack of knowledge is further supported by another survey finding that only 13% of publishers report having used "other untracked audience solutions."

Percentage of Publishers that Feel Contextual Targeting and Untracked Neighborhood Characteristics Data is Very Privacy Safe – and that Use Other Untracked Audience Solutions

62%	13%	13%
% of Publishers that say contextual targeting is very privacy safe	% of Publishers that say untracked neighborhood characteristics are very privacy safe	% of Publishers that use/have used other untracked audience solutions
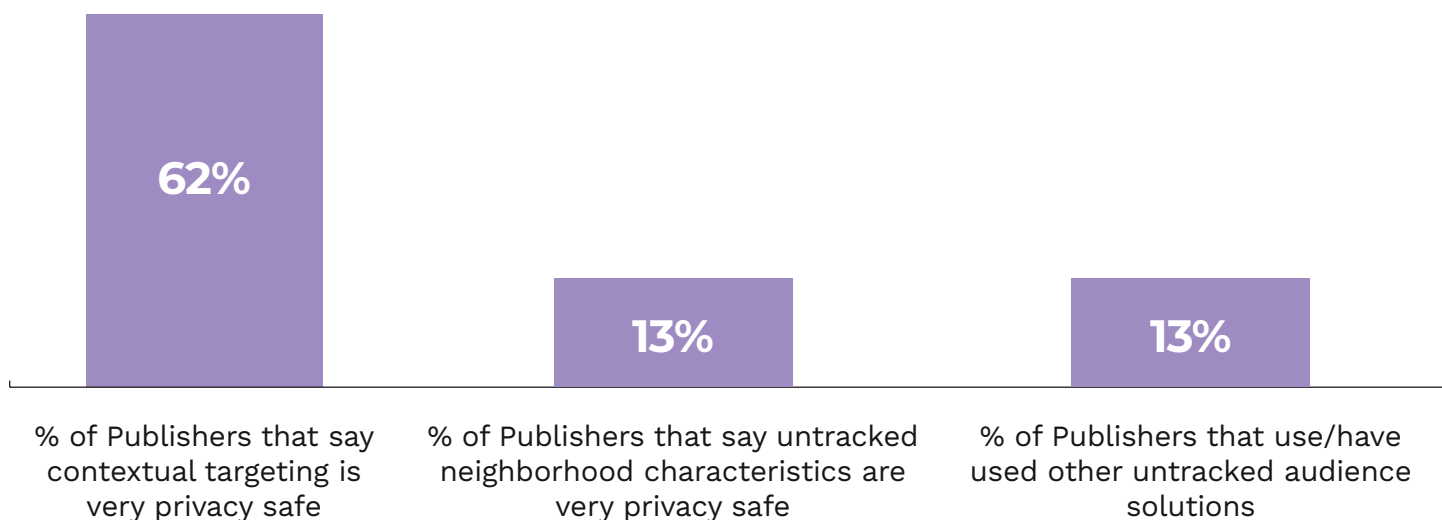
In a privacy-first environment tracking free technologies should be the first choice. One of the goals of this study is to look into the usage, performance and conception of the most well-known tracked and untracked audience technologies.
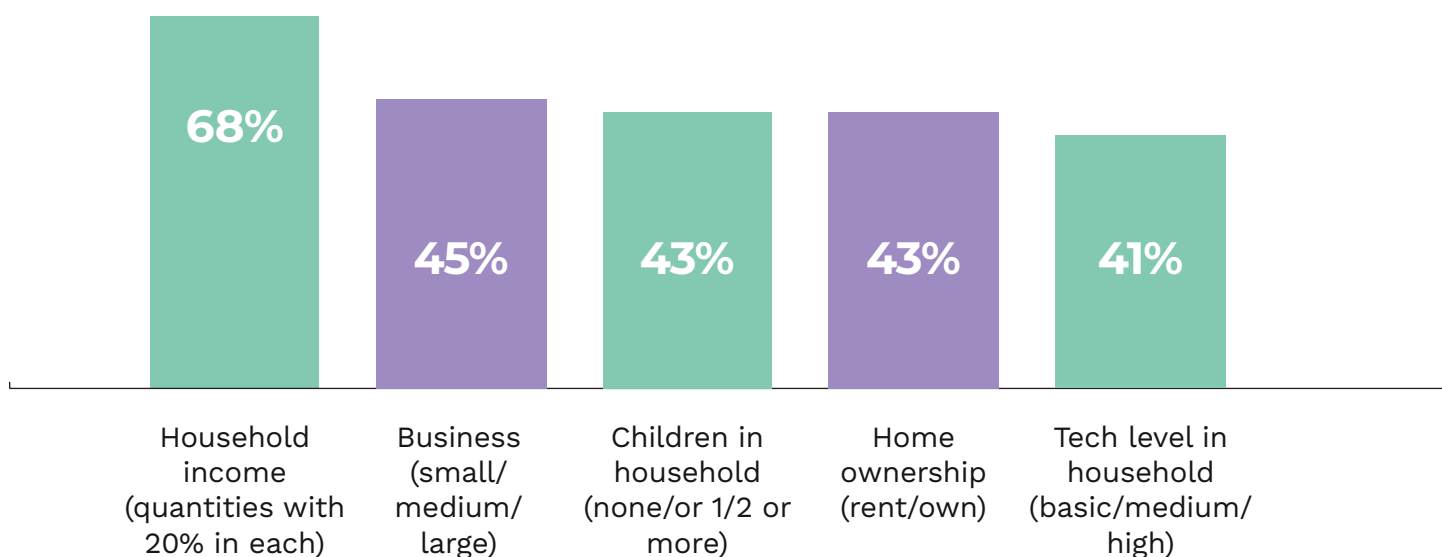
– Søren Dinesen, CEO and Co-founder of Digiseg

Key Insight #5 Most publishers want more visibility of audience household income levels, which is available from neighborhood/household characteristics data.

The survey asked publishers for the most valuable neighborhood/household characteristics and demographics to help them sell to advertisers. In addition to household income, they are most interested in business size, number of children in the house, home ownership information, and technology usage.

Most Valuable Neighborhood/Household Characteristics and Demographic Data

68%	45%	43%	43%	41%
Household income (quantities with 20% in each)	Business (small/ medium/ large)	Children in household (none/or 1/2 or more)	Home ownership (rent/own)	Tech level in household (basic/medium/ high)

"For unaddressable like iOS and Safari, clean rooms, ID solutions, and our 1st party data can get you a long way - but for unconsented inventory, only contextual and household characteristics can help."

– Thomas Lue Lytzen, Director of Ad Sales & Tech at Ekstra Bladet (Part of JP/Politiken Mediagroup, Denmark's largest commercial news publisher)

Conclusion

Publishers have faced serious issues since the beginning of digital advertising and the changing privacy environment is just their next challenge. Consumer privacy demands and the contingent legislation requirements are only expected to increase. Cookie deprecation, the immediate privacy change they face, has given rise to technologies like IDs solutions and clean rooms, both of which effectively duplicate and, worse, even improve on the tracking cookies enabled. There is the potential for an untenable situation in the industry. Also, illustrating this dilemma is the survey finding showing publishers expect they will benefit from more addressability over the next few years, yet more consumer and regulatory efforts point to even more focus on privacy and control over personal data. Publisher first-party data is cost-effective and privacy safe but for many publishers and digital ad campaigns first-party data is only a partial solution due to both lack of scale and precision. Consent remains a challenge for many publishers who have low subscribed or registered visitors.

On top of this, as the research also shows, advertising revenue is being lost. The eCPM findings in particular show how painful publishing economics have become.

But this shift presents a significant opportunity for publishers to take back control, to move away from being a source of cookies for advertisers to target, to return to publishing's roots as the audience owner. They are already doing this with contextual signals but an additional option is for publishers to access untracked audience data based on real-world data based on households not URLs. Yet there needs to be more industry education on what is available, the data sources and process, and ultimately the value to publishers and advertisers, as well as the privacy concerns of consumer and audiences.

Questions for continued discussion include:

- What is the future of the open market? How much do consumer privacy demands and legislation threaten the open web?

- What other methodologies or solutions could provide addressability without tracking?

- What are the second-order effects of not just duplicating the functionality of the cookie, but making it even more robust? Would this be more onerous privacy restrictions, or further walled garden consolidation and dominance?

- How much confidence is there in 1P data, is its superiority overstated?

- To what extent is privacy more of a resource issue than a technology issue?

About the Survey Respondents

Most of the respondents work for publishers and media companies. Thirty-four percent are with companies that generate over $101 million in revenue, and 49% hold either C-suite or VP titles.

Definitions: Addressability / Precision / Scale / Tracking

Addressability is the ability to target specific individuals or groups with personalized advertising messages, based on their demographic, behavioral or contextual data.

Precision refers to the level of efficiency and accuracy in targeting the intended audience with an ad. It measures how well an ad campaign reaches the specific target audience and avoids reaching irrelevant users.

Scalability refers to the size and reach of an advertising campaign, typically measured by the number of impressions, clicks, or conversions it generates. It represents the extent to which an ad campaign can reach a relevant audience at scale.

Tracking refers to the process of monitoring and collecting data about users' online activities, such as their browsing behavior, search queries, and website visits. This data is then used to create targeted ads and improve the effectiveness of advertising campaigns. Tracking is typically done through the use of cookies, pixels, and other tracking technologies that are embedded in websites and advertising content.

I. Publishers' Digital Inventory Challenges and Goals

This key section of the report covers a number of important findings, insights and benchmarks with a focus on publishers' biggest digital inventory related concerns. Included is the analysis of the use of granular audience neighborhood and household-based data for advertising programs, and the value of accessing more addressable audiences. The section concludes with how publishers feel existing targeting solutions are not fully covering their needs.

Publishers' Biggest Digital Inventory Related Concerns

Survey Question: Which of the following current industry developments concern you the most when it comes to monetizing your digital inventory?

It's an understatement to say that publishers have a number of challenges to contend with. The top three digital ad inventory related issues are tracking prevention in browsers (64%), privacy legislation/regulation (53%), and low audience match/sync rates (40%). The promise of digital publishing and advertising, of directly and efficiently engaging with the right audiences, has faced roadblocks. It's also interesting to note that over one-third of publishers feel the added complexity required to navigate the industry is a key issue. While it's somewhat of a simplification, most industries have two main concerns: serving customers and keeping up with their competition. In this survey only 17% of publishers say that increasing competition is an issue.

Publishers' Biggest Digital Inventory Monetization Concerns

	%
Tracking prevention in browsers (e.g., third-party cookies)	64%
Privacy legislation (such as GDPR and CCPA)	53%
Audience match/sync rates	40%
Added complexity in general	37%
Ad blockers	23%
Users less likely to subscribe	22%
Platform changes (such as SSPs and DSPs)	19%
Increasing competition	17%
Ad fraud	15%
Inappropriate ads served	16%
All the above	9%
Other	5%

Publishers' Use of Granular Audience Neighborhood or Household Based Data for Advertising Programs

Survey Question: Are you aware of or currently use any Neighborhood or Household Audience Characteristics or Demographics from publicly available data sources to monetize your digital inventory and/or provide custom advertising programs for advertisers? (Examples of this type of audience data include age, income, education level, home ownership, technology usage, etc.)

Only 37% of publishers are currently using granular neighborhood or household level audience data to deliver their digital ad programs. Thirty percent of publishers are aware that more granular audience data is available for their digital ad programs but have not used it yet.

	%
Yes, we already use this level of granular audience data for digital ad programs	37%
Yes, we are aware of this type of granular audience data availability for digital ad programs, but have not used it	30%
No, unaware	25%
Unsure	8%

A Large Percentage of Publishers Would Benefit by Being Able to Address a Larger Segment of Their Inventory Using Audiences

Survey Question: Would it be beneficial to you if you were able to address a larger part of your inventory using audiences?

Seventy-seven percent of the respondents noted that being able to address a larger part of their inventory using audiences would be beneficial to their business immediately.

	%
Yes, this is or would be helpful now	77%
Yes, in 1 to 2 years	11%
Unsure	7%
No	5%

Percentage of Advertisers that Publishers Believe Would Be Interested In Addressable Audiences

Survey Question: What percentage of your advertisers do you believe would be interested in addressable audiences?

A total of 67% of publishers estimate between 70% and 100% of their advertisers would be interested in accessing addressable audiences, and 23% say between 30% and 69% of their advertisers would benefit. Both publishers and advertisers want to effectively reach more addressable audiences.

% of Advertisers Publishers Believe Would Be Interested In Addressable Audiences

70% - 100%	30%-69%	0%-29%	Not Applicable
67%	23%	6%	4%
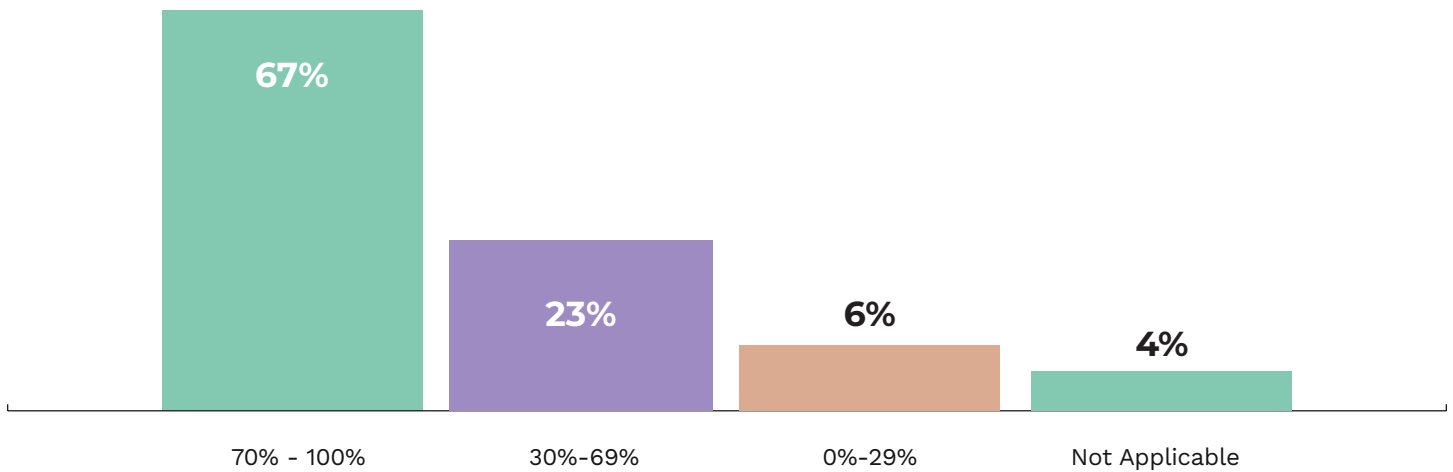
Publishers' Most Valued Audience Neighborhood/Household Characteristics and Demographics

Survey Question: Which of the following types of addressable audiences based on neighborhood/household characteristics and demographics would be valuable for you to sell with your digital ad inventory?

By a significant margin the number one most valuable audience data point is household income, which was selected by 68% of publishers, followed by business size (45%), number of children in household (43%), home ownership vs. rent (43%), and tech usage level in household (41%). Just over one-third of publishers say they also value more granular data on audience education levels, type of home dwelling, lifecycle/stage of life, and number of cars in the households.

	%
Household income (quantiles with 20% in each)	68%
Business (small/medium/large)	45%
Children in household (none/1/2 or more)	43%
Home Ownership (rent/own)	43%
Tech level in household (basic/medium/high)	41%
Education (basic/medium/higher)	36%
Home type (house/apartment)	34%
Lifecycle (stage in life)	34%
Cars in household (none/1/2)	34%
Savings (size of savings)	25%
Neighborhood type (countryside/village/suburban/city)	25%
Building age (older/mid/newer)	16%
Living space per sq. ft. or m2 (small/mid/large)	14%
Other	7%

Publishers Believe Existing Targeting Solutions are Not Fully Covering Their Need to Create High-Value Inventory

Survey Question: Do the existing targeting solutions in the industry cover your needs in terms of creating high-value inventory?

Publishers want more, new and better targeting solutions to help them create high-value advertising inventory. A significant 84% of publishers say existing targeting solutions are either not covering their needs or that there is room for improvement. Only 10% of publishers say current targeting solutions cover their ability to create and monetize high-value ad inventory.

|	%
Yes, we're all covered	10%
Yes, but there is room for more/better solutions	56%
No, we are still waiting for a better solution(s) to solve it all	28%
Don't know, we currently have other priorities	6%

II. Pricing and Revenue Benchmarks

This benchmarks section covers average eCMP pricing benchmarks from the survey findings along with the percentage of ad revenue generated by open auction.

There's a Wide eCPM Revenue Gap Between Publishers' Addressable Inventory and iOS/Safari and Unconsented Audiences

Survey Question: What is the approximate eCPM for your addressable inventory? *(And)* What is the approximate eCPM for your iOS/Safari and unconsented inventory?

iOS/Safari anonymous and unconsented visits mean significantly lower eCPMs for publishers. According to the survey findings, iOS/Safari visitors on average generate an eCPM of $3.78 compared to $12.74 for addressable inventory. Unconsented visitor audience eCPM is $2.44 on average according to the findings. The chart below has turned these eCPMs into a comparative index with the average addressable inventory rate ($12.74) assigned at "100." For iOS/Safari visitors the eCPM index statistic is "30" ($3.78 divided by $12.74) and for unconsented traffic the index figure is "19" ($2.44 divided by $12.74). Obviously, addressability is a critical issue for publishers. A number of factors tie together to put publishers' ability to drive digital advertising revenue under pressure. Low addressability, lack of audience consent, and tracking prevention combine to lower eCPM rates and drive a wide revenue gap.

Average eCPM Comparison Index: Addressable Inventory vs. Safari and Unconsented *
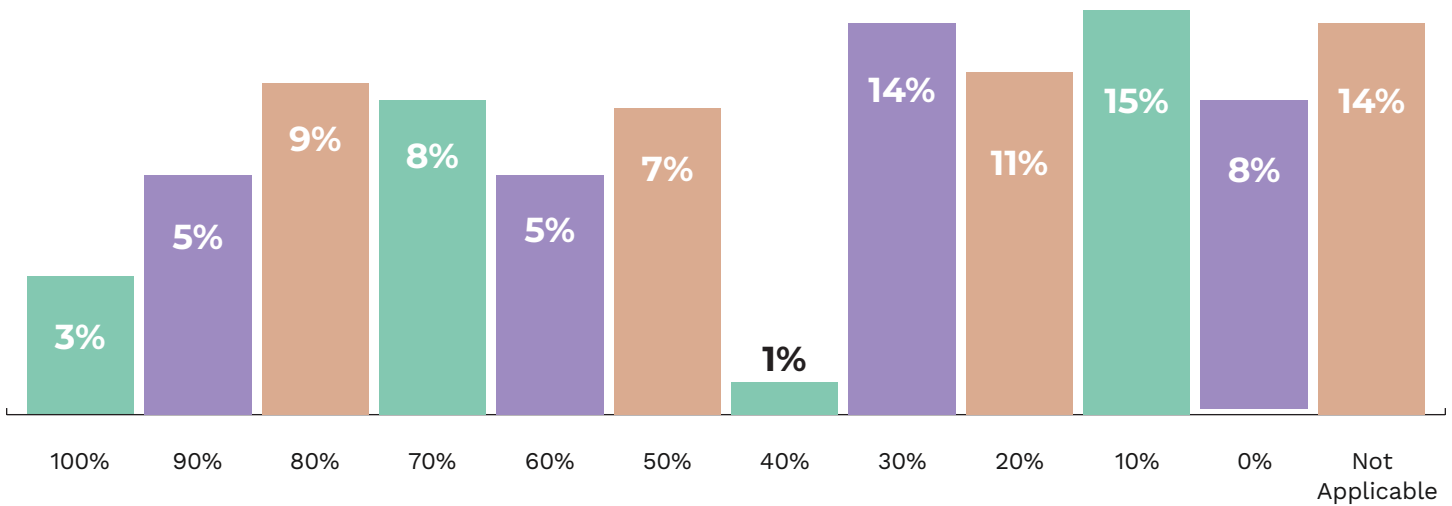

100	30	19
Addressable Inventory (ave. eCPM $12.74)	iOS/Safari (ave. eCPM $3.78)	Unconstested (ave. eCPM $2.44)
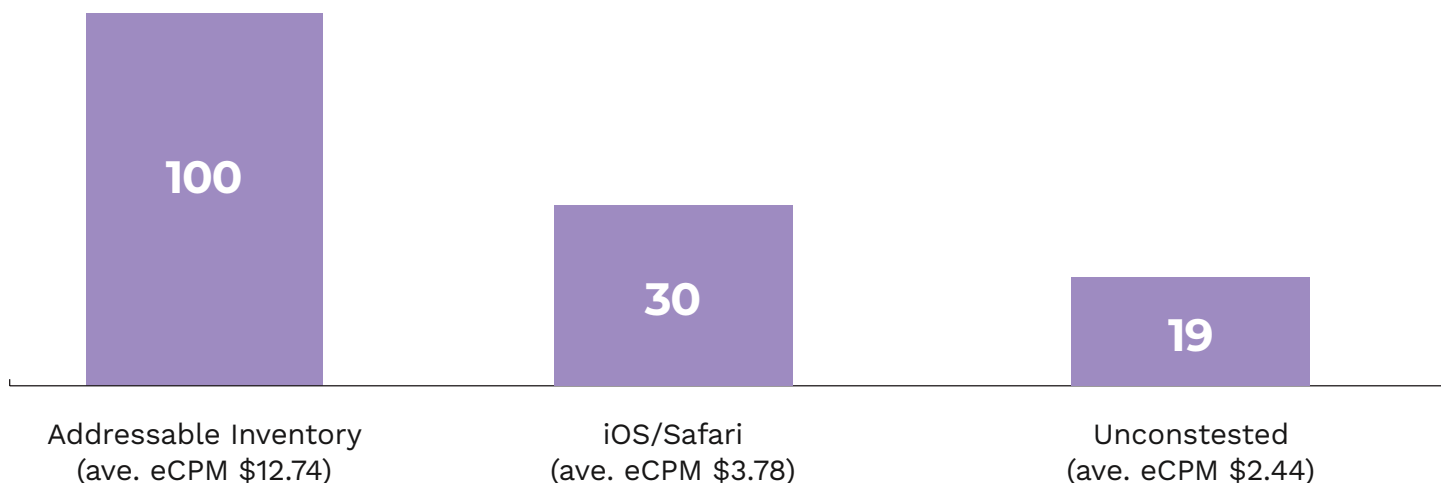
* Index Scale: Addressable Inventory average eCPM of $12.74 = 100%.

Percentage of Publisher Ad Revenue Generated by Open Auction

Survey Question: What percentage of your ad revenue is generated by your open auction?

There's a wide distribution in the percentage of ad revenue generated by open auction, according to the survey findings, although nearly half of publishers (49%) say it's 40% or less.

Percentage of Publisher Ad Revenue Generated by Open Auction

Category	Value
100%	3%
90%	5%
80%	9%
70%	8%
60%	5%
50%	7%
40%	1%
30%	14%
20%	11%
10%	15%
0%	8%
Not Applicable	14%

III. Publishers on Data Privacy

The critical issue of data privacy is the focus of this section of the study. Benchmarks are provided, including publisher ratings of various tracked addressability solutions to ensure users' privacy, and known or perceived privacy levels of untracked addressability solutions.

Some of the findings pinpoint one of the dilemmas facing publishers. Specifically, that even though audience characteristics available at the granular neighborhood level are not tracked and are indeed privacy safe, many publishers do not perceive this type of data as more privacy safe than tracked solutions such as IDs and Cean Rooms. This disconnect, this misunderstanding of what is available at the granular neighborhood level may be the reason why more publishers have not yet adopted using neighborhood characteristics data.

Publishers Rate Various Tracked Addressability Solutions to Ensure Users' Privacy

Survey Question: To what extent do you find that the following tracked addressability solutions give you the option of ensuring users' privacy?

It's no surprise that first-party data is considered the most privacy safe type of tracked accessibility solution for publishers and advertisers. In comparison, ID Solutions and Clean Rooms are considered to have a medium level of privacy safety according to 60% and 61% of publishers respectively.

	Very privacy safe	Medium privacy safe	Not so privacy safe
First-Party Data	61%	34%	5%
ID Solutions	16%	60%	24%
Clean Rooms	29%	61%	9%

Perceived Privacy Levels of Untracked Addressability Solutions

Survey Question: To what extent do you find that the following untracked addressability solutions give you the option of ensuring users' privacy?

Contextual targeting is considered very privacy safe by 62% of publishers. But only 13% find un-trackable neighborhood characteristics data very privacy safe. This is a contradiction that suggests a lack of industry knowledge about certain differences of tracked and untracked solutions.

	Very privacy safe	Medium privacy safe	Not so privacy safe
Contextual targeting	62%	32%	6%
Neighborhood/Household characteristics/demographics from publicly available data (e.g., age, income, home ownership, # in household, etc.)	13%	55%	32%

Percentage of Publishers' Website Audiences/Users that Give Consent

Survey Question: On average, what percentage of the users on your site(s) give consent?

The findings here show a widely dispersed response to this question. But a total of 58% of publishers say consent is provided by 50% or more of website users/visitors/audiences. Looking out over the next two years, collectively, 65% of publishers expect consent to be provided by over 50% of their site visitors/audiences. While the outlook is for improvement, these findings show that large percentages of website visitors do not currently and are not expected to provide consent, register or provide more information to access expanded website content.
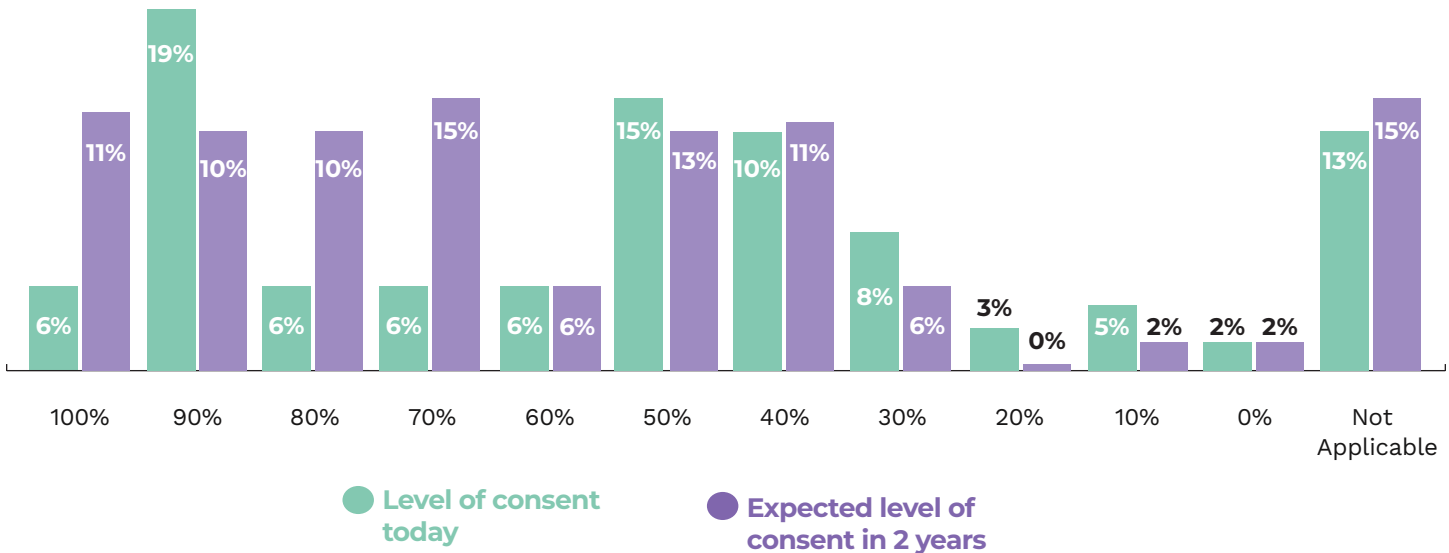
IV. Publishers Rate Various Audience Solutions

This concluding section provides findings and benchmarks covering a range of tracked and untracked audience solutions. A key takeaway is that even though ID Solutions and Clean Rooms are considered less privacy safe than first-party data, more than two-thirds of publishers are still testing or considering these solutions. This raises a few questions:

*   Why are publishers continuing to pursue audience tracking methods in the face of increasing efforts around consumer and audience privacy and regulation?

*   To what extent are publishers still in testing mode for these alternatives, and testing ID Solutions and Clean Rooms in particular? And how long will this testing and experimenting period last?

*   Are publishers hoping for new solutions that will continue to provide a level of tracking – or are they hoping that the trend towards more privacy and regulation reverses?

Percentage of Publishers Using Tracked Targeting Methods to Address Their Digital Ad Inventory

Survey Question: How are you working with the following tracked targeting methods to address your digital ad inventory?

Sixty-four percent of publishers are currently using first-party data to address their digital ad inventory. One-third are using ID Solutions. While only 12% are using Clean Rooms currently, a total of 26% of publishers have tested or plan to test this option, and an additional 32% are considering trying Clean Rooms.

	Currently Using	Tested/Testing	Considering	Not Using or Considering
First-Party Data	64%	19%	13%	4%
ID Solutions	33%	19%	30%	18%
Clean Rooms	12%	26%	32%	30%

Percentage of Publishers Working with Untracked Targeting Methods to Address their Digital Ad Inventory

Survey Question: How are you working with the following untracked targeting methods to address your digital ad inventory?

Sixty-one percent of publishers are currently using contextual targeting, and a total of 33% are either testing, considering testing or trying contextual targeting. Neighborhood/Household characteristics/demographics are currently being used by 37% of publishers.

	Currently Using	Tested/Testing	Considering	Not Using or Considering
Contextual targeting	61%	19%	14%	6%
Neighborhood/ Household characteristics/ demographics	37%	6%	29%	28%

The implication of these findings is that legacy untracked contextual targeting methods are still dominant for many publishers. The lack of neighborhood data testing and interest aligns with the misperception that this method is not privacy safe.

Percentage of Publishers' Addressable Inventory Today and Expected in Two Years

Survey Question: How much of your inventory is addressable? Please provide addressability level today, and what you expect in two years.

Publishers are optimistic that audience addressability will increase over the next few years, but it's hard to see how that will happen. Over the next two years, publishers expect the percentage of their inventory that is addressable to rise despite the headwinds of privacy legislation, increasing tracking prevention, cookie deprecation and ad blockers. This data shows a wide distribution, but it's important to note that a total of 56% of publishers say that half or more of their inventory is addressable today. In two years, a total of 75% of publishers expect more than 50% of their inventory will be addressable. This optimism is probably based on the hope that the data and advertising technology sectors will deliver on their promises despite the fact that most of the solutions today are still a form of consumer and user tracking with a "trust" layer added in between the publisher, advertiser and consumer/site visitor/reader.
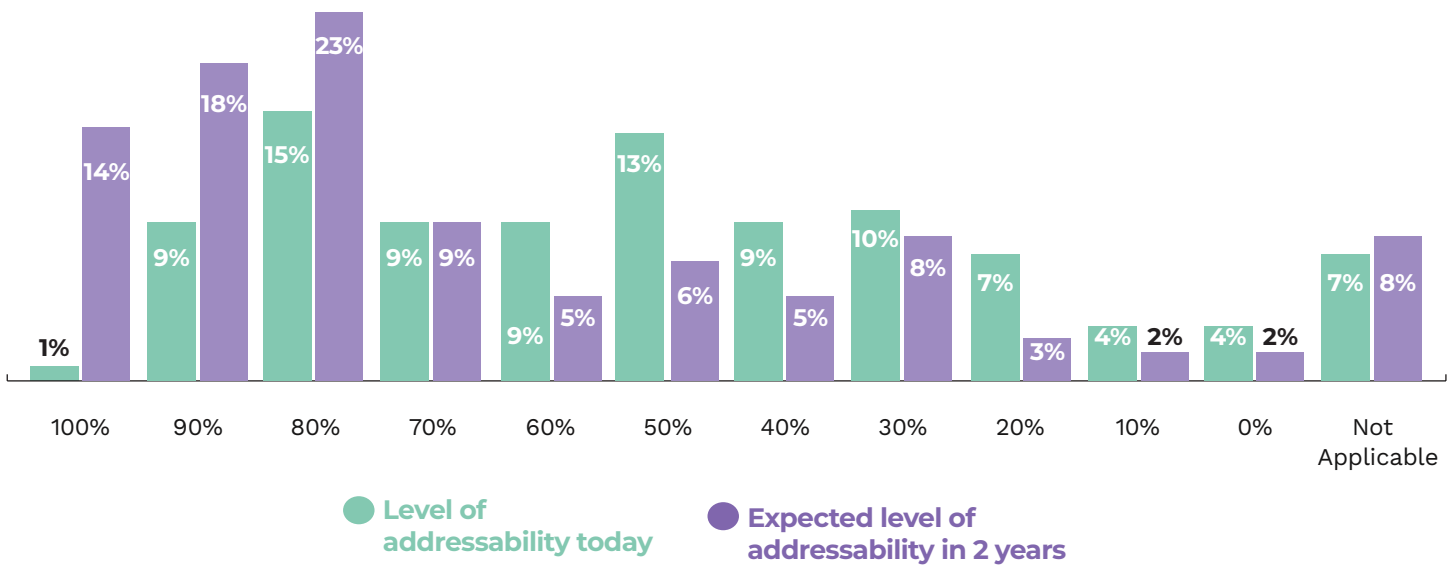

Other findings in this study also suggest conflicting sentiment related to a number of key industry issues. Publishers are optimistic despite many roadblocks. This raises the question, is this based on hope in forthcoming technology innovations or that there will be rollbacks in privacy efforts both regulatory and at the consumer level.

Publishers Rate First-Party Data Solutions on Precision and Scale

Survey Question: How have First-Party Data solutions been working for you in terms of precision and scale? Please rate from 1 (bad) to 5 (good).
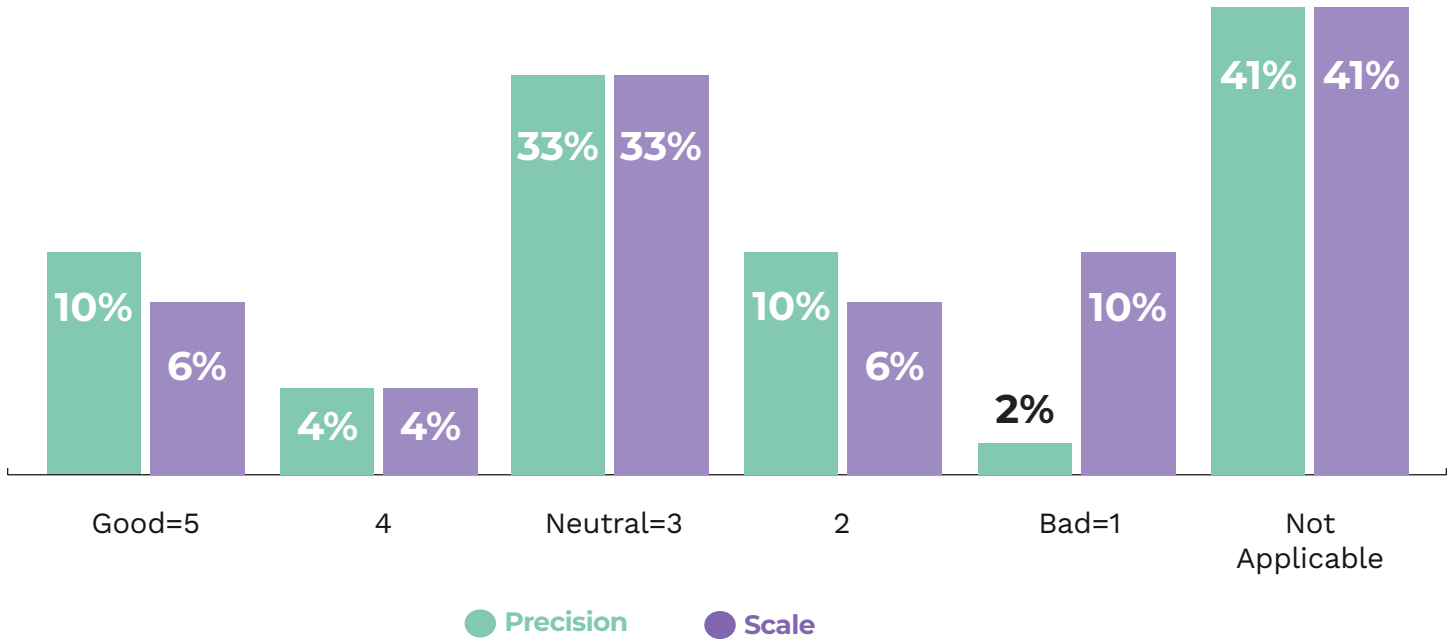
A paradox of using first-party data is that publishers consider the precision to be moderate to high, but the scale is not yet that significant for many publishers.

	Good=5	4	Neutral=3	2	Bad=1	Not Applicable
Precision	24%	24%	27%	4%	6%	14%
Scale	18%	16%	22%	18%	10%	14%
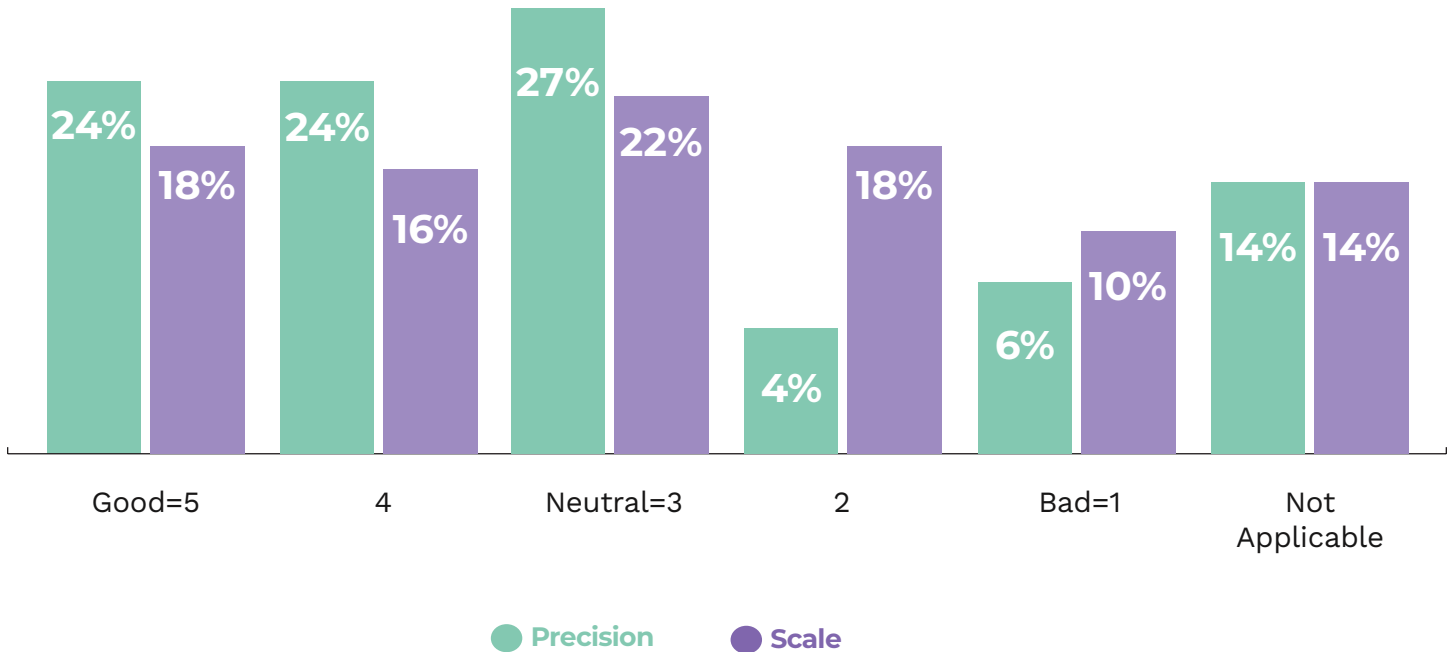
- Precision
- Scale

Publishers Rate ID Solutions on Precision and Scale

Survey Question: How have ID Solutions been working for you in terms of precision and scale? Please rate from 1 (bad) to 5 (good).

ID Solutions are only rated moderately effective in terms of precision and scalability.

Chart showing Precision and Scale ratings:

Rating	Precision	Scale
Good=5	10%	6%
4	4%	4%
Neutral=3	33%	33%
2	10%	6%
Bad=1	2%	10%
Not Applicable	41%	41%

● Precision   ● Scale

Publishers Rate Data Clean Rooms on Precision and Scale

Survey Question: How have Data Clean Rooms been working for you in terms of precision and scale? Please rate from 1 (bad) to 5 (good).
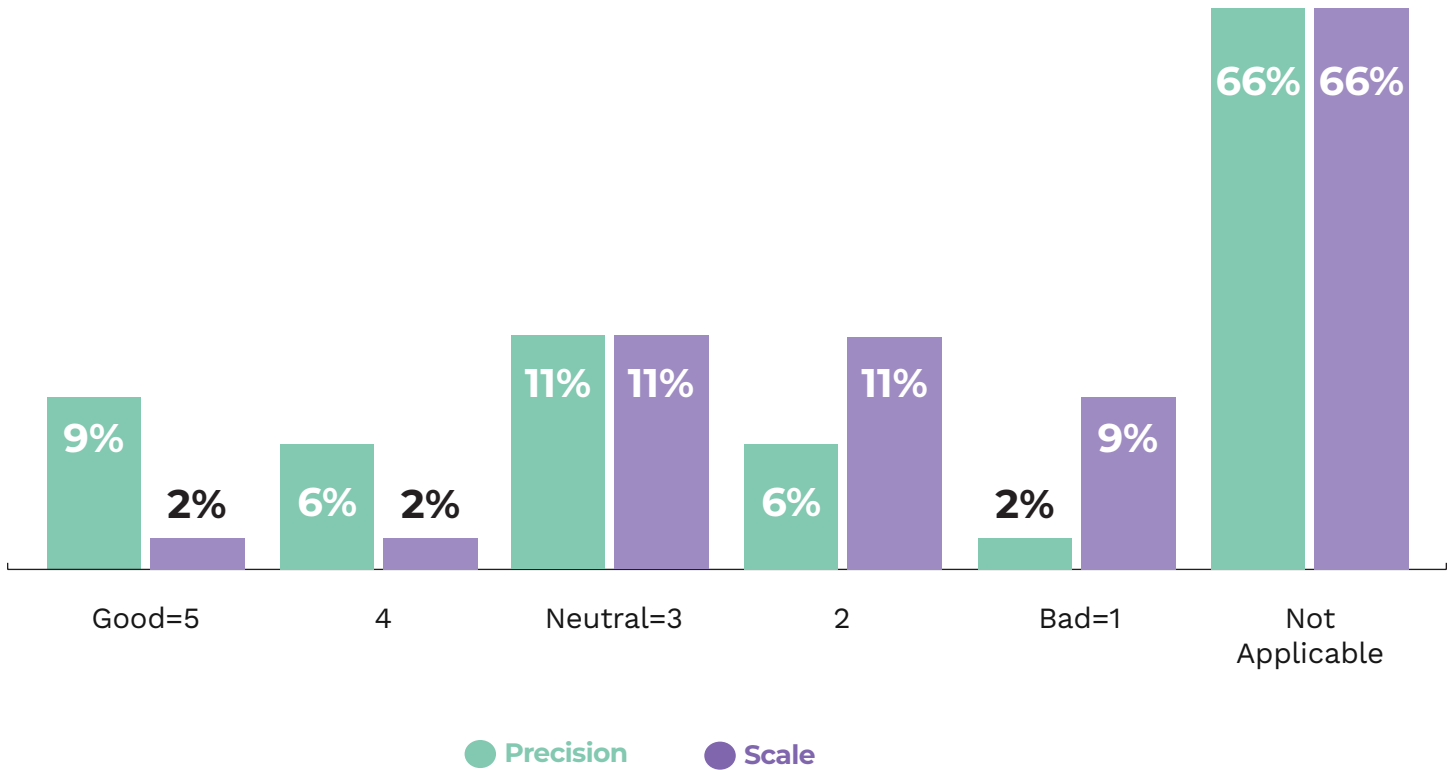
While most publishers have not used Clean Rooms, those publishers that have provide moderate effectiveness ratings.

	Good=5	4	Neutral=3	2	Bad=1	Not Applicable
Precision	9%	6%	11%	6%	2%	66%
Scale	2%	2%	11%	11%	9%	66%

● **Precision** ● **Scale**

Publishers Rate Contextual Targeting Solutions on Precision and Scale
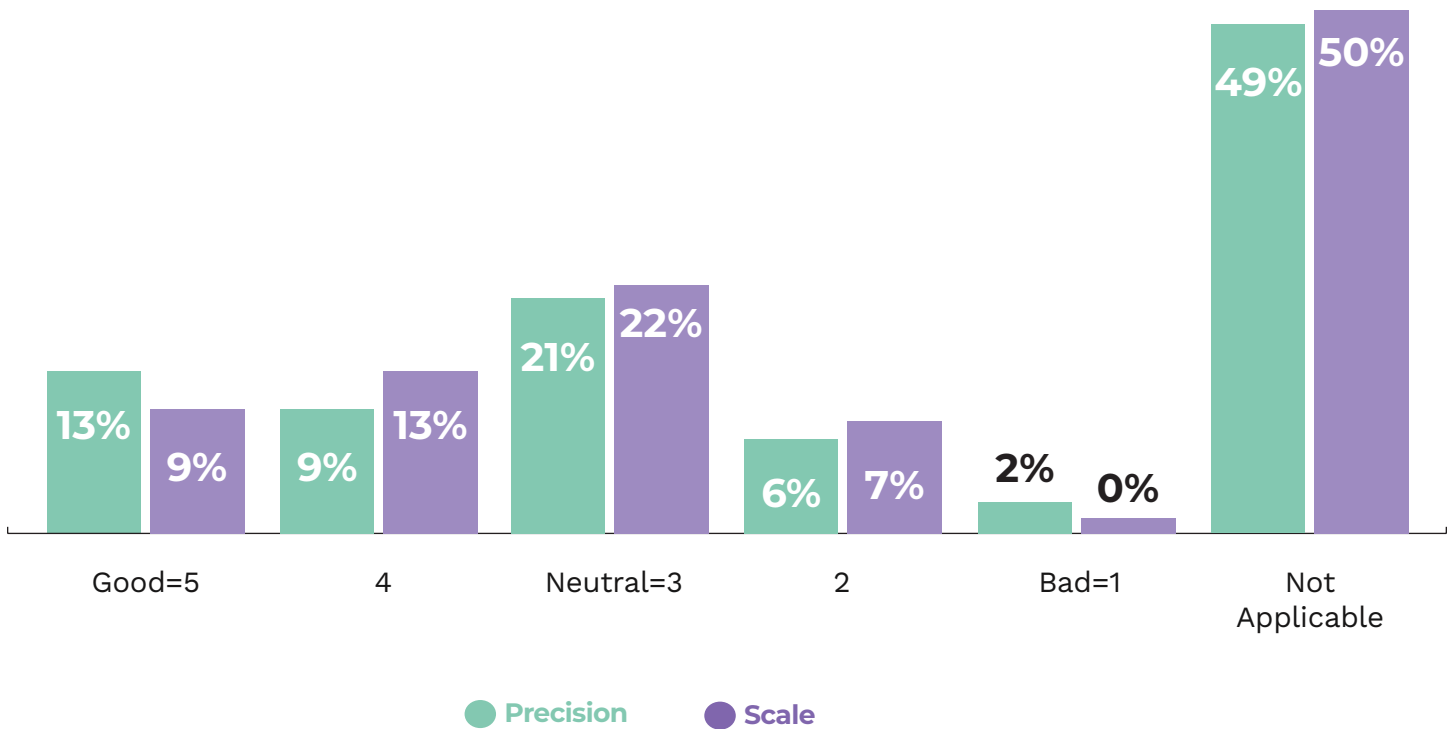
Survey Question: How have Contextual Targeting solutions been working for you in terms of precision and scale? Please rate from 1 (bad) to 5 (good).

Overall, Contextual Targeting is rated moderate to good in terms of precision and scale.

Legend: ● Precision ● Scale
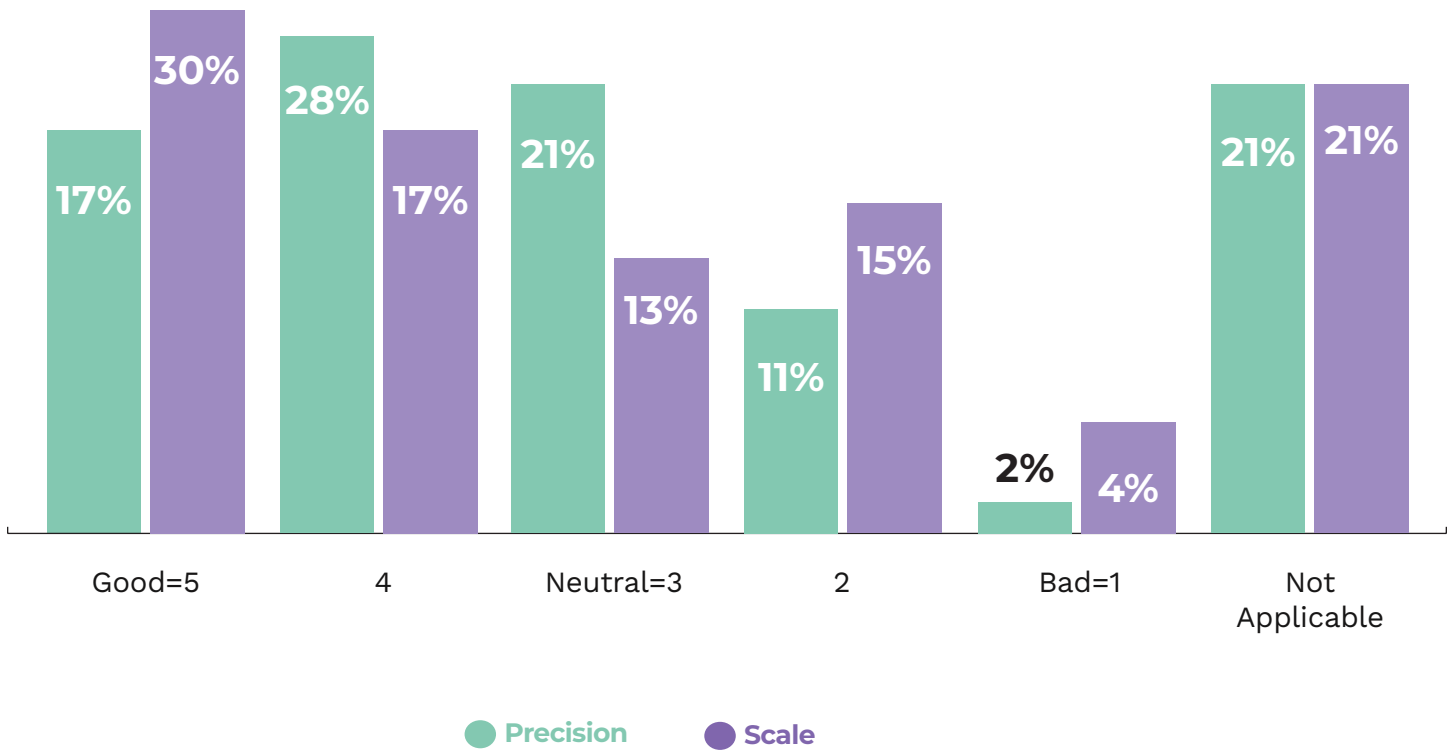
Publishers Rate Their Use of Neighborhood/Household Characteristics/ Demographics (IP-based) Solutions on Precision and Scale

Survey Question: How have Neighborhood/Household Characteristics/ Demographics (IP-based) solutions been working for you in terms of precision and scale? Please rate from 1 (bad) to 5 (good).

	Good=5	4	Neutral=3	2	Bad=1	Not Applicable
Precision	13%	9%	21%	6%	2%	49%
Scale	9%	13%	22%	7%	0%	50%

● **Precision** ● **Scale**

Percentage of Publishes That Have Used/Are Using Other Untracked Audience Solutions
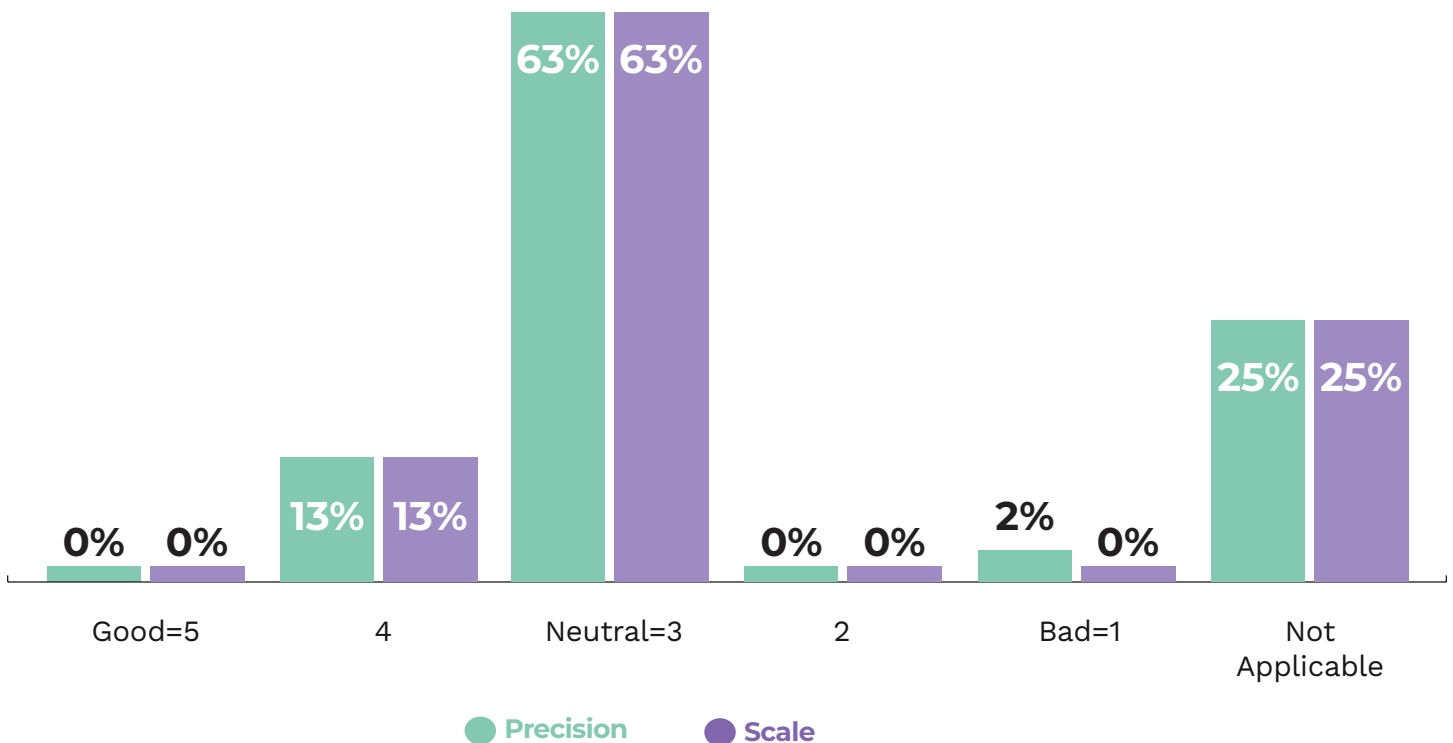
Survey Question: Are you using or have you used other untracked audience solutions?

Only 13% of publishers say they have been using other untracked audience solutions. This finding suggests that a large percentage of publishers haven't tried many untracked audience solutions and may simply be unaware of what is available.

	%
Yes	13%
No	54%
Unsure	33%

Publishers Rate Other Untracked Audience Solutions on Precision and Scale

Survey Question: How has this other untracked audience solution or solutions been working for you in terms of precision and scale? Please rate from 1 (bad) to 5 (good).

Chart data:

	Good=5	4	Neutral=3	2	Bad=1	Not Applicable
Precision	0%	13%	63%	0%	2%	25%
Scale	0%	13%	63%	0%	0%	25%

● **Precision**   ● **Scale**

Methodology & About the Respondents

Digiseg and AdExchanger surveyed a cross-section of leading publishing professionals serving both consumer and business markets in a range of industry sectors. The survey was conducted June and July of 2023 and received 103 responses.

Type of Organization

	%
Publisher	87%
Ad Network	9%
Other	4%

Respondents' Company Gross Revenue

	%
<$10 Million	15%
$11 Million to $50 Million	34%
$51 Million to $100 Million	17%
$101 Million to $1 Billion	15%
>$1 Billion	19%

Respondents' Job Role

	%
C-level	16%
EVP/VP	33%
Director	20%
Manager	24%
Other	6%

About Digiseg

Digiseg maps digital advertising to households—the primary consumer decision-making unit. Our data can identify what your customers need. Cookie and ID free, our technology can be used across all devices, media types and operating systems – including iOS, Safari — to target advertising and measure audiences. Digiseg's robust demographics data offers unrivalled reach, covering all households in each of its 45 markets.

Real-world data

Segment people not events. Not URLs.

Privacy first

ID free. No tracking, logging or syncing.

Scale

recognize up to 80% of impressions.

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