2022
Consent Management Platforms
Adoption & Market Share Analysis

ObservePoint

Audience & Methodology

ObservePoint used our proprietary web auditing technology to scan 1000+ of the top trafficked websites to glean insights into Consent Management Platform (CMP) adoption rates and market share in the United States and Europe.

ObservePoint's Audits scanned each site to identify:

➤ Presence or absence of a CMP

➤ Implementation completeness across the website

➤ CMP provider

➤ Which Tag Management System (TMS) was paired with them

* For the insights where geography was involved, the headquarters of the organization was used. Many of the companies with sites audited are multinational, and this is reflected in the similar results between the US and Europe.
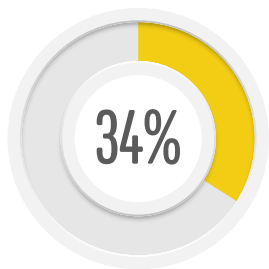
CMP Adoption

Gartner predicts **65%** of the world will be covered by data privacy regulations by 2023, but the majority of websites still need to implement a CMP, so there's plenty of progress to be made. Regional privacy regulations are proliferating, so implementing a CMP has become a basic necessity to collect and manage consent for your digital property.
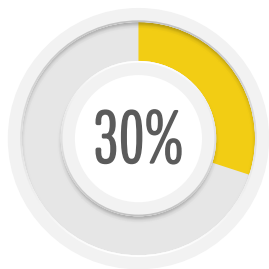
33%
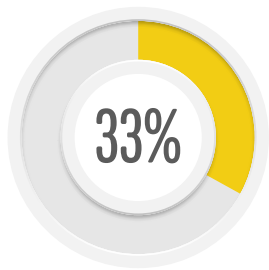
of the sites audited had a detectable CMP present.

32%
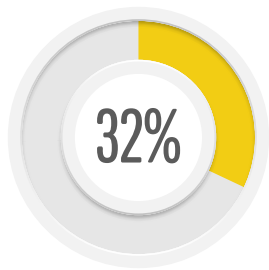
of websites run by European-headquartered companies had CMPs.

The closeness of the US and Europe* was surprising as it was expected that a much higher share of European websites would have Consent Management Platforms due to the early establishment of GDPR in 2018. The similarity is likely due to the multinational nature of enterprise businesses which make up the bulk of the websites audited.

34%

of websites run by US-headquartered companies had CMPs.

30%

of the CMP implementations ObservePoint audited are flawed in a significant way.

For example, websites with options to opt out of all but required cookies are often still loading marketing and analytics trackers. Additionally, CMPs are frequently found to be deployed incompletely and functionality becomes more interrupted as changes are made to a website.

A faulty CMP implementation can prolong non-compliance instead of mitigating risk.
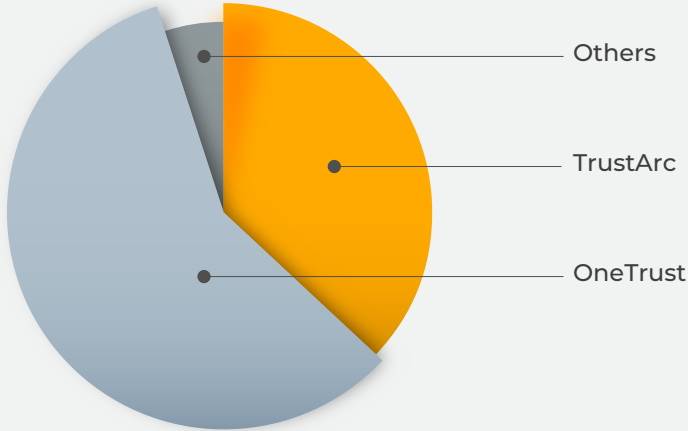
Market Share US & EU

OneTrust and **TrustArc** are the global market leaders for CMPs, but there is nuance between regional markets. In North America, these two providers accounted for **95%** of the market. However in Europe, they were less dominant with only **77%** of the market share. There is more variety of providers being utilized in Europe, accounting for **23%** of the market.
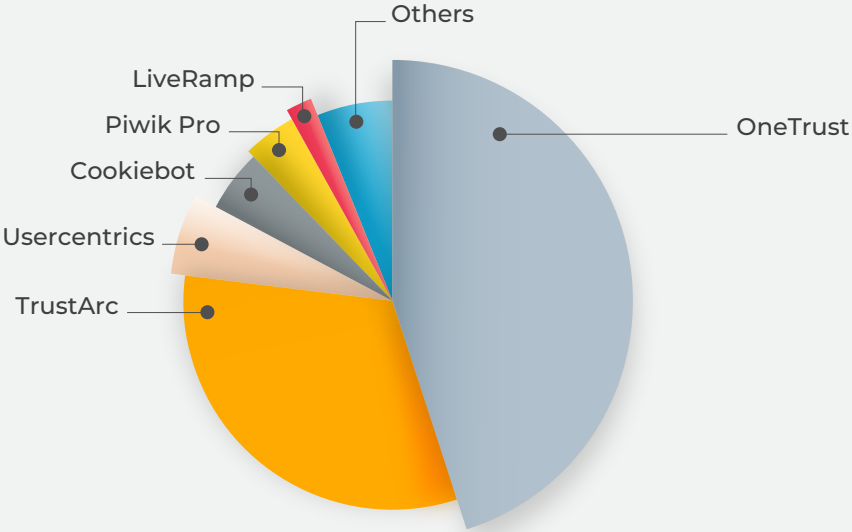
Regardless of provider, a CMP is not something you can set and forget.

As with any third-party technology, implementations can go awry at the beginning or deteriorate over time as a website is updated. To get the most value out of your Consent Management Platforms, you need to monitor its performance beyond just the initial data discovery stage and confirm they are honoring your visitors' consent preferences consistently.

Market Share North America

Others
TrustArc
OneTrust

Market Share Europe

Others
LiveRamp
Piwik Pro
Cookiebot
Usercentrics
TrustArc
OneTrust

CMP & TMS Pairings

ObservePoint analyzed the pairings of Tag Management Systems (TMSs) and CMPs to identify any synergistic patterns.

We found that websites with TrustArc were more than twice as likely to be paired with Adobe Launch, with 54% of users with TrustArc also using Adobe Launch, compared to 29% of the overall market share of Adobe Launch amongst those scanned.

Another outlying result was that websites using OneTrust were four times as likely to have Tealium as their TMS compared to TrustArc customers.

While these are interesting data points, we cannot yet draw definitive conclusions from these results, as the reasons could be multifaceted.

CMPs rely on the TMS to know what tags and cookies are on a website and how to categorize them so visitors can opt in or out. However, connecting the two software together can be tricky, and even if they are working together smoothly, hardcoded or piggy-backing tags will not be visible to either, leaving your website open to inadvertently setting cookies without consent.

TMS Adoption
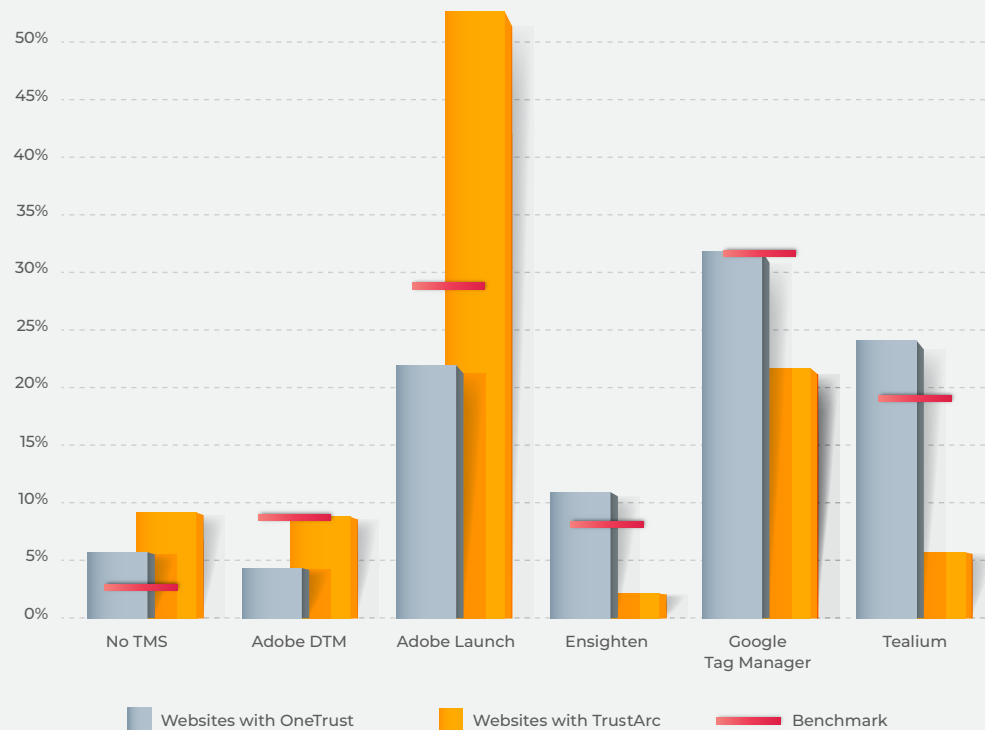
Legend: Websites with OneTrust | Websites with TrustArc | Benchmark

	Websites with OneTrust	Wesbsites with TrustArc	Benchmark
No TMS	6%	9%	3%
Adobe DTM	4%	8%	9%
Adobe Launch	22%	54%	29%
Ensighten	11%	2%	7%
Google Tag Manager	32%	21%	32%
Tealium	24%	6%	19%

Analysis Implications

The results of ObservePoint's Audits on CMP adoption and market share point out that enterprise-level companies still have a long way to go in terms of getting their privacy compliance in working order.

While legal departments might be concerned with ensuring CRMs and the current databases containing customer information are compliant, the website – as one of the first places customers encounter a brand – can become a major liability without proper consent management.

Read this blog post for more about the challenges of CMPs.

Watch this video to see how ObservePoint can show you what's really happening with the data collection on your site and fill out the form to request your custom Privacy Audit.

By detecting these issues quickly and alerting relevant stakeholders, ObservePoint helps protect your customers, your data, and your reputation.

REQUEST CUSTOM PRIVACY AUDIT