2024

—

Counting Cookies

3 Years later

Presented by

{"DMPG"} and

ObservePoint

Introduction

Three years ago, the debate around cookies, cookie types, 3rd-party cookie categories & dependencies, and the impending doom of cookie deprecation had reached a fever pitch. However, there wasn't much in the way of hard numbers or clear explanations for the implications of cookie dependency and what marketers should do to mitigate the risks.

To address this, DMPG and ObservePoint undertook an extensive piece of research to look at the top 100 websites in the US, UK, and AU. We went a little deeper in Australia (Top ~200) and a little more nuanced in the UK to understand the difference between explicitly opted-in versus the "default state."

This time around we also looked at:

☑ Opted-in as well as the "default state" (No explicit attempt to opt-in) for **all markets**

☑ What tags ObservePoint associates with 1st-party cookies to uncover the risks presented by **cookie expiration limits** associated with Safari's Intelligent Tracking Prevention (ITP).

As we've been putting this report together, **Google announced that they are no longer deprecating 3rd-party cookies** and leaving it up to users. While many publishers and ad tech providers expressed disappointment after investing so much time into Privacy Sandbox, others have charged on with their explorations of cookieless targeting alternatives because there will inevitably be a drop in trackable visitors once users begin opting out. We tend to agree with the latter as other browsers already present users unaddressable via 3rd-party cookies.

The fundamentals we observed three years ago remain consistent, so our recommendations for mitigating dependency on 3rd-party cookies are similar, reflecting the enduring relevance of these strategies:

· Renew emphasis on 1st-party data
· Prepare to shift to contextual targeting
· Nurture 2nd-party data partnerships
· Leverage "walled garden" capabilities
· Consider server-side tagging options
· Monitor and remove legacy tags

What We Found Last Time

☑ In 2021, 3rd-party cookie dependencies were high across the board at 81.7% across all markets

☑ The **advertising category** accounted for **84.9%** of those cookies, an overwhelming majority

☑ Websites in the **UK market** had higher regard for consumer preferences with observable efforts to instrument consent management solutions – a notable contrast to other markets where privacy and consent legislation is less demanding when compared to GDPR.

Three years is a long time in digital, so we have rerun the numbers with every attempt to promote comparability. The data references the same sites as the last time but with further details.
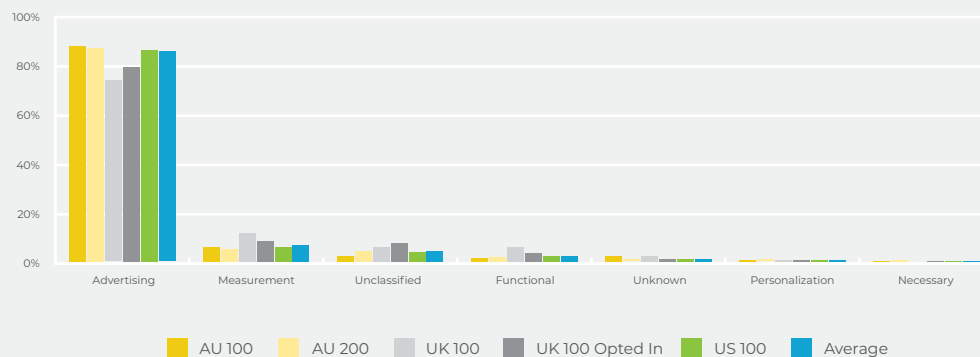
% Sites Setting 3rd-Party Cookies
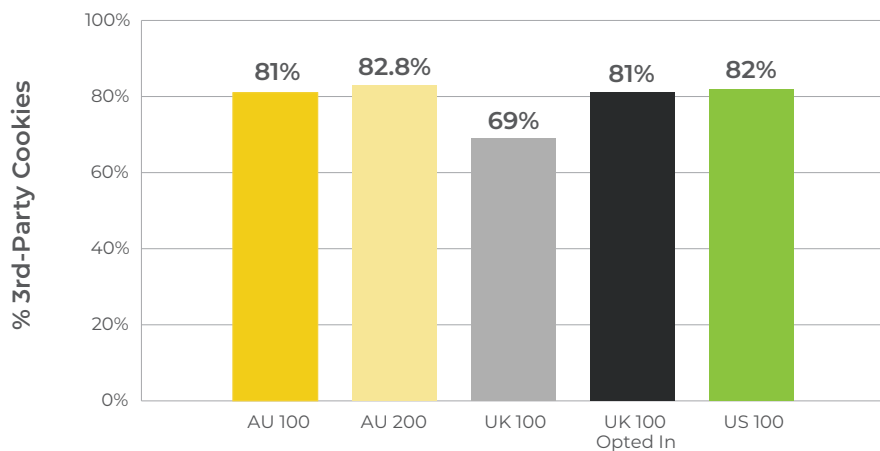
3rd-party Cookie Domains Category % by Market

	Avertising	Measurement	Unclassified	Functional	Unknown	Personalization	Necessary
AU 100	87.7%	5.8%	2.3%	1.5%	2.1%	0.5%	0.1%
AU 200	86.9%	5.1%	4.4%	1.7%	0.7%	0.8%	0.4%
UK 100 Opted In	79.1%	8.3%	7.6%	3.5%	1.1%	0.4%	0.0%
US 100	86.0%	6.2%	4.0%	2.2%	1.0%	0.6%	0.3%
Average	84.9%	6.3%	4.6%	2.2%	1.2%	0.6%	0.2%

3rd-party Cookie Domains Category % by Market

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What We Found This Time

3rd-party cookie dependencies are only fractionally down from our analysis 3 years ago and remain high across the board.

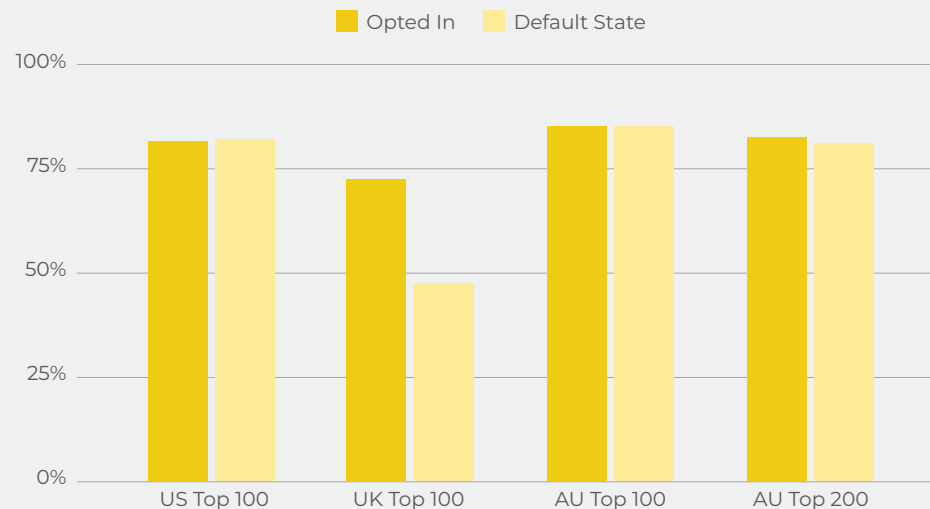In 2024, 3rd-party cookie dependencies were at **79.8%** across all markets

The UK has made a notable improvement in the scale and scope of cookies set with consent. However, a small number of cookies continue to be set without explicit opt-in on almost half of the websites reviewed (**47%**). This highlights the need for ongoing vigilance to monitor and manage cookies/tags and the instrumentation via consent management solutions to avoid issues.

The US and Australia can be seen to make little effort to respect user preferences with little difference between explicitly opted in vs the "default state." With no legislative directive making this a legal requirement, it is perhaps unsurprising.

% of Websites Setting 3rd-party Cookies

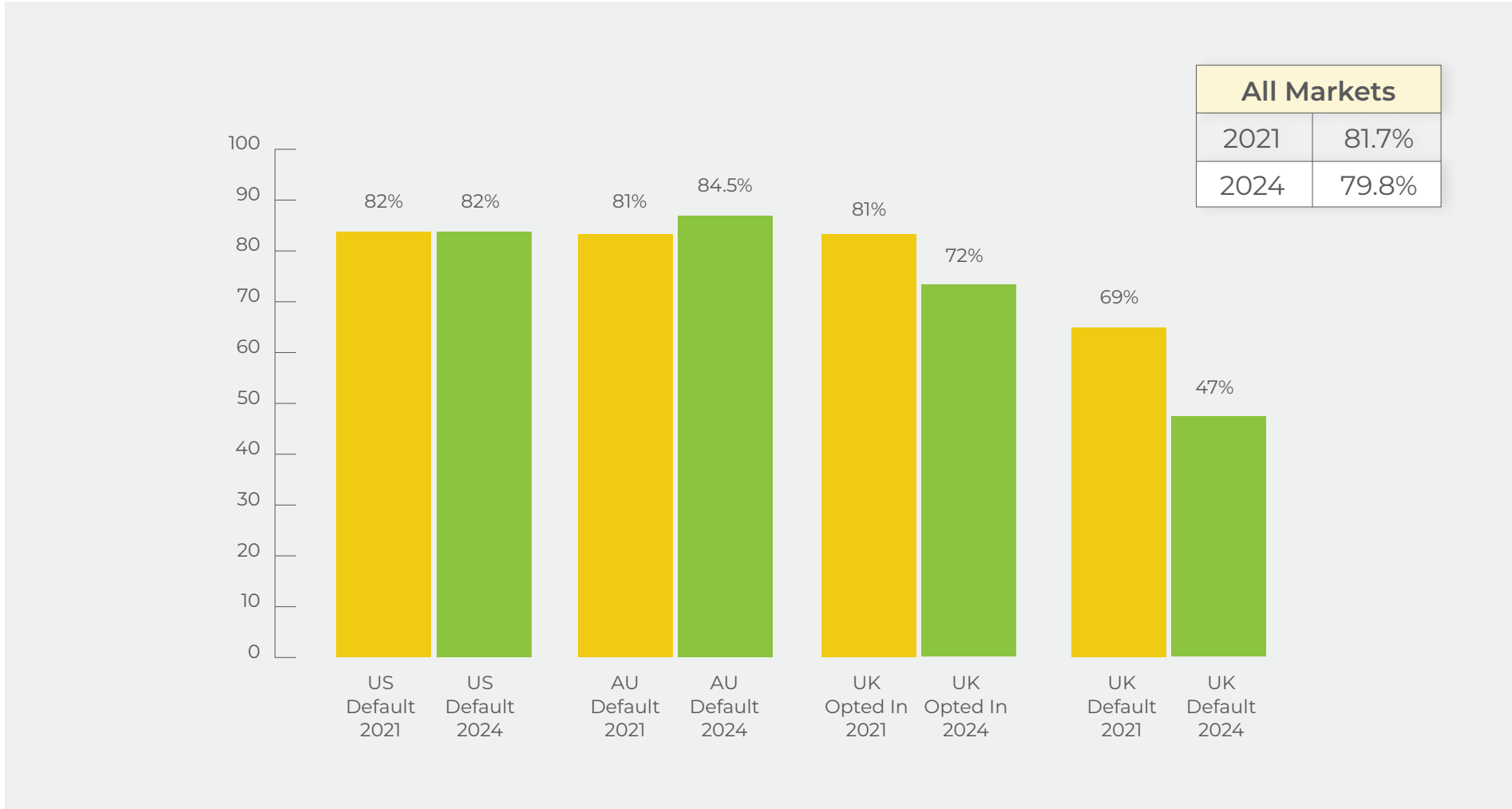|	Explicitly Opted In	Default State
US Top 100	81.0%	82.0%
UK Top 100	72.0%	47.0%
AU Top 100	84.5%	84.5%
AU Top 101-200	82.1%	81.0%
All Markets	79.8%	N/A

% of Websites Setting 3rd-party Cookies

Year-over-Year Comparison

Percent of Websites Setting 3rd-Party Cookies 2021 vs 2024

All Markets	
2021	81.7%
2024	79.8%

Chart values:
- US Default 2021: 82%
- US Default 2024: 82%
- AU Default 2021: 81%
- AU Default 2024: 84.5%
- UK Opted In 2021: 81%
- UK Opted In 2024: 72%
- UK Default 2021: 69%
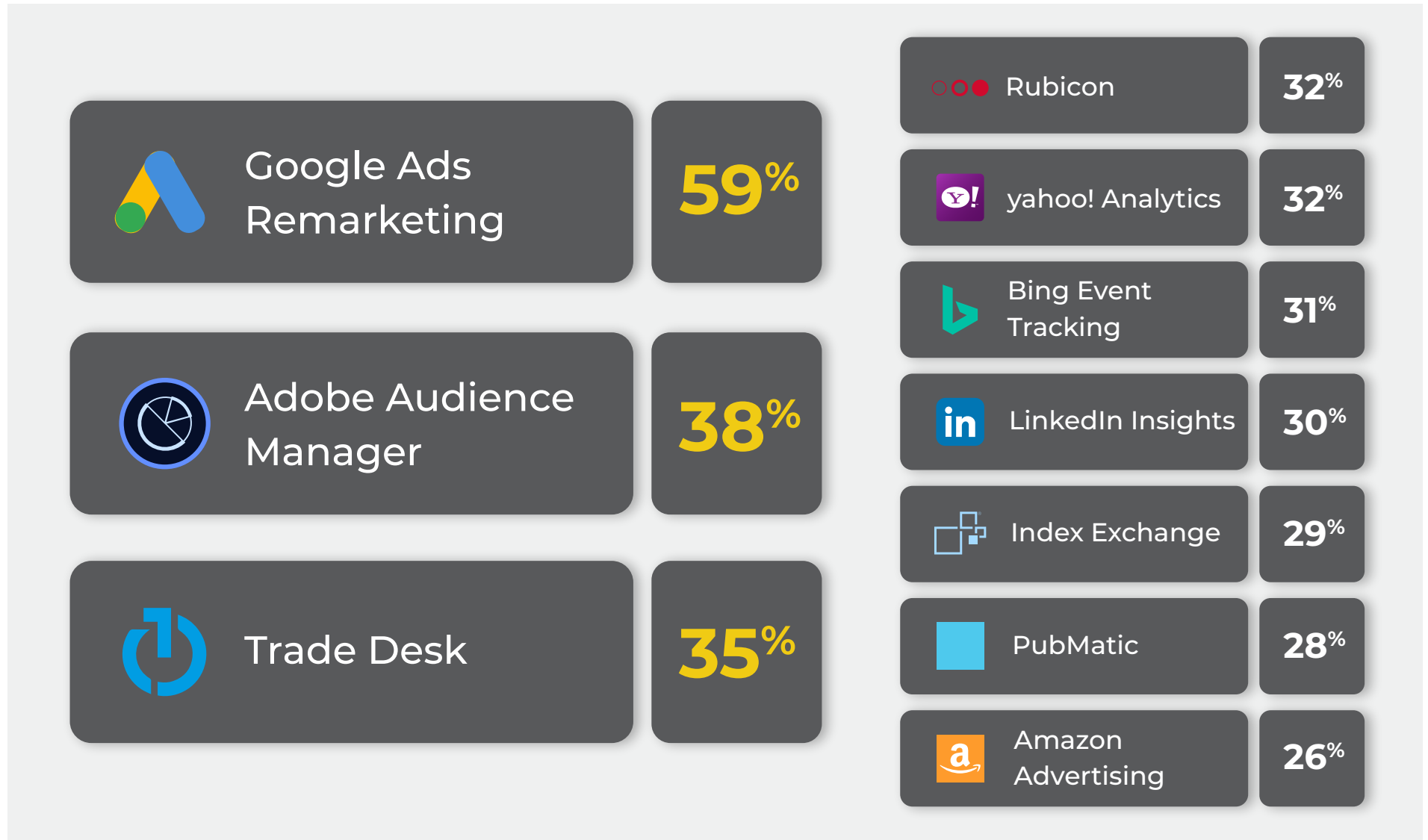- UK Default 2024: 47%

What are 3rd-Party Cookies Used For?

The **advertising category** edged slightly higher than last year to **86.6%** and now accounts for the overwhelming majority of 3rd-party cookies.

3rd-party Cookie Domains - Category % by Market - Opted In

Legend: AU Top 100 | AU Top 101-200 Opted In | UK Top 100 Opted In | US Top 100 Opted In | Average
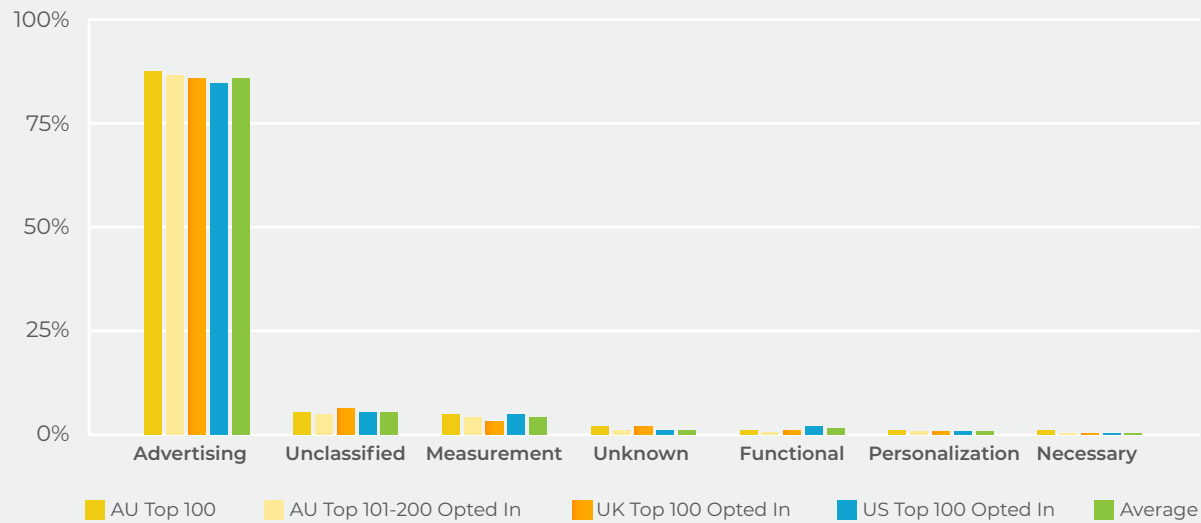
	Avertising	Unclassified	Measurement	Unknown	Functional	Personalization	Necessary
AU Top 100 Opted In	87.3%	5.1%	4.1%	1.8%	0.8%	0.5%	0.4%
UK Top 100 Opted In	86.7%	6.3%	3.1%	2.0%	1.5%	0.3%	0.2%
US Top 100 Opted In	85.2%	5.6%	5.3%	1.2%	2.1%	0.6%	0.1%
Across All Markets	86.6%	5.5%	4.4%	1.5%	1.2%	0.6%	0.2%

Most Common 3rd-Party Initiators

Google Ads Remarketing — **59%**

Adobe Audience Manager — **38%**

Trade Desk — **35%**

Rubicon — **32%**

yahoo! Analytics — **32%**

Bing Event Tracking — **31%**

LinkedIn Insights — **30%**

Index Exchange — **29%**

PubMatic — **28%**

Amazon Advertising — **26%**

3rd-Party Cookie Domains & Cookie Counts

There was a significant increase in the number of cookies observed from 2021, indicating growth in the scale of technology using 3rd-party cookies across all markets. For example, in the US, there were 282 unique cookie domains in 2021, compared to 313 in 2024.

Take a note of the difference in mean cookies between the opted-in state and the default (opted-out) state for the UK. The mean # of cookie domains was 3 when customers did not opt in. **UK websites have taken action to fall into line with GDPR.**

Meanwhile, the **US and AU show little to no difference between the default and the opted-in state**, since unlike the UK, the default state is not automatically opted-out. However, in the US, where CMP usage is much higher than the AU, the default state actually turns out to be even more permissive than explicitly opting in, which is slightly surprising.

		US Top 100		UK Top 100		AU Top 100	
		Opt In	Default	Opt In	Default	Opt In	Default
3rd-Party Cookie Domains	Mean Average	31	33	25	3	25	25
	Maximum	124	130	81	43	81	84
	Unique Cookie Domains	311	313	266	88	266	257

		US Top 100		UK Top 100		AU Top 100	
		Opt In	Default	Opt In	Default	Opt In	Default
3rd-Party Cookie Names	Mean Average	65	68	48	5	48	48
	Maximum	310	333	173	68	173	171
	Unique Cookie Names	719	720	514	128	514	514

Analysis of Cookie Duration

The ObservePoint platform has evolved significantly in the last three years, with improvements and additions to the features and data points available. This has enabled us to look more closely at 1st-party cookies set by 3rd-party technology providers to evaluate the risk presented by Safari ITP.

Widespread dependency was found across markets. **70-73 of the top 100 websites have 3rd-party tags setting 1st-party cookies**. The tags observed included:

- ☑ Tag management solutions
- ☑ Analytics platforms
- ☑ Advertising platforms
- ☑ Testing and personalization solutions

The obvious implication for this is that data accuracy, attribution, testing/personalization activity will be impacted where a cookie expiration of longer than 7 days is required. Of note, **the majority of these cookies had a median cookie duration of 1 year or longer, yet ITP will override this and impose its own 7-day limit.**

We could also see quite a number of GA UA (legacy) references which raises a separate point for old tags and cleaning out tags that are redundant and potentially adding page weight that could impact end user experience.

> **TOP TIP** | Regularly audit your tags and remove anything that you don't use any more.

Apple's Safari browser continues to develop a hardline on cookies set client-side even when in a 1st-party context. This means that irrespective of the cookie expiration setting, the cookie will be removed after 7 days, and this window can contract to 1 day in some cases (link decoration with known tracking parameters are present). Given that **Safari accounts for 18-20% of all browser traffic**, this presents a significant problem.

US Top 100:
3rd-Party Technologies Setting 1st-Party Cookies & Expiration Dates

Rank	Related Tags	Count of Websites	% of Count where Cookie Expiration >7 Day of Total	Median Cookie Value where Experience >7 Days
1	Google Tag (gtag)	39	100%	400
2	Google Universal Analytics Loader	28	21%	400
3	OneTrust CMP Banner	26	100%	365
4	Google Universal Analytics Loader, Google Tag (gtag)	22	100%	400
5	Bing Ad Loader	21	100%	390
6	Facebook Events Bootstrap	17	100%	90
7	Akami mPulse Page Load	14	7%	7
8	Google Tag Manager	12	75%	90
9	Adobe Launch	11	100%	400
10	TikTok Loader	9	100%	390

Across 73 websites, 91 3rd-party tags were setting 1st-party cookies. Tags were related to tag management solutions, analytics, advertising and testing/personalization platforms.

UK Top 100:
3rd-Party Technologies Setting 1st-Party Cookies & Expiration Dates

Rank	Related Tags	Count of Websites	% of Count where Cookie Expiration >7 Day of Total	Median Cookie Value where Experience >7 Days
1	Google Tag (gtag)	40	100%	400
2	Google Universal Analytics Loader	32	50%	400
3	Facebook Events JS Bootstrap	26	100%	90
4	OneTrust CMP Banner	25	100%	365
5	Bing Ad Loader	19	100%	390
6	Google Tag Manager	18	94%	90
7	Google Universal Analytics Loader, Google Tag (gtag)	16	100%	400
8	TikTok Loader	14	100%	390
9	Tealium iQ: Profile Container	13	100%	365
10	Adobe Launch	11	91%	400

Across 70 websites, 79 3rd-party tags were setting 1st-party cookies. Tags were related to tag management solutions, analytics, advertising and testing/personalization platforms.

AU Top 100:
3rd-Party Technologies Setting 1st-Party Cookies & Expiration Dates

Rank	Related Tags	Count of Websites	% of Count where Cookie Expiration >7 Day of Total	Median Cookie Value where Experience >7 Days
1	Google Tag (gtag)	47	100%	400
2	Facebook Events JS Bootstrap	39	100%	90
3	Google Universal Analytics Loader	38	24%	400
4	Google Universal Analytics Loader, Google Tag (gtag)	29	100%	400
5	Google Tag Manager	27	85%	90
6	Bing Ad Loader	24	100%	390
7	Adobe Launch	15	93%	400
8	Google Ads Remarketing	13	100%	390
9	Adobe Analytics, Adobe Visitor ID FPC	11	100%	400
10	Optimizely Setup	10	100%	180

Across 73 websites 78 3rd-party tags were setting 1st-party cookies. Tags were related to tag management solutions, analytics, advertising and testing/perzonalisation platforms.

Take a Look at Server-Side Cookies

The last item that we looked at was to scour the data for points of reference that indicated server-side technology/cookie implementations.

The prevalence of server-side implementation appeared to be quite limited, but server-side tagging is inherently opaque and tricky to identify.

The relevancy of server-side implementations:

- When done correctly, it serves to **address cookie frailty** because **ITP does not currently restrict cookies set from server-side.**
- This can be useful in persisting values back to a client-side context from server-side to effectively **extend life spans back up to 12 months.**
- It is most relevant to organizations where consideration phases are above 7 days or where there is no/low level of user login/ identification.

Server-Side Pros:

- Improved marketing attribution
- More accurate returning user numbers in analytics
- CX personalization

Server-Side Cons:

- Can be quite technical and time-consuming
- Is not possible for all technologies and use cases
- Regulatory developments are yet unknown and a risk

There can be significant benefits and value to server-side migrations which should be evaluated on a case-by-case basis.

Key Takeaways

☑ It's still about 3rd-party cookies though the event horizon **no longer looms** for Chrome. Companies should still look to mitigate their dependencies now, especially for the advertising tech category as we expect a significant portion of users to eventually opt-out.

☑ The net implications of upcoming privacy act 2024 reform in Australia remains to be seen, but AU appears to be lagging when it comes to being proactive in offering consumers consent management solutions and competing on trust practices.

☑ Ensuring that tags/tech and associated cookies are deployed correctly within CSPs for UK/EU websites.

☑ Organizations should be removing legacy tags and monitoring wider "tag health" to ensure that websites remain high-performing.

☑ ITP still needs to be addressed with implications for 1st-party cookies pulled into frame. (Server-side migration should be considered)

☑ 1st-party data strategies incorporating utility for authentication and transparent value exchange to supplement zero party data is going to be critical into the future.

So What Can You Do?

Recommendations for mitigating dependency on 3rd-party cookies remain the same from 2021.

Step 1: Understand your exposure
Quantify the number of domains setting 3rd-party cookies on your site to understand your exposure.

Step 2: Dig into the details
Catalog the cookies on your site to identify and understand the technologies and associated capabilities in your digital ecosystem that have dependencies on 3rd-party cookies.

Step 3: Develop a roadmap to mitigate the risk
As you develop your cookie mitigation roadmap, you will need to work closely with tech leads and developers in your organization and on the vendor side to eliminate the dependency as much as possible. Identify what alternatives to ad cookies you will use to ensure effective advertising strategies. Some alternatives include:

- **Renew emphasis on 1st-party data** — In order to rely primarily on 1st-party data assets, you will likely need additional time and resources to develop content and utility applications which confer enough value to encourage users to move into an authenticated state.

- **Prepare to shift to contextual targeting** — Investing in contextual targeting is another way to prepare for a future state without heavy cookie reliance.

- **Nurture 2nd-party data partnerships** — Develop 2nd-party data assets and compete in "trust practices" such as data sharing through private data clean rooms.

- **Leverage "walled garden" capabilities** — These capabilities include access to a majority of the addressable market as well as a range of tools that enable targeting and measurement without relying on 3rd-party cookies.

- **Consider server-side tagging options** – To mitigate the growing frailty of client-side cookies, consider moving certain cookies server-side. This can help counteract Safari's Intelligent Tracking Prevention (ITP), which restricts cookie durations to 7 days—or as little as 24 hours if tracking parameters are detected.

- **Monitor and remove legacy tags** – Keep digital residue to a minimum so that tag health remains high and websites perform well.

Step 4: Get to work!

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About

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DMPG is a highly experienced team of ~40 digital experience enablement specialists certified in Adobe, Google, Tealium, and many other leading marketing technology stacks.

With teams in London, Australia, and North America, DMPG delivers best-practice data collection and activation advisory services.

DMPG helps clients to fully leverage their tech, data, and people using well established strategies & processes that we have refined over the last 10 plus years.

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ObservePoint

ObservePoint's Web Governance platform brings insights, automation, and compliance to the complexity of your digital customer experience.

ObservePoint's solution automates the scanning of your web presence; from the highest traffic pages and user paths to the dark corners of your company's websites. See what's performing below acceptable standards, trace it back to the source, and quickly see a path to improvement. Establish privacy compliance standards, validate landing pages, confirm data tracking, clearly see your entire marketing tech stack, validate your ecommerce engines, and much more.

ObservePoint presents the reality of what's happening on your website and gives you a clear map to make it even better.

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