

# CTV, identity consolidation, and more: Ad trends that cookie deprecation will—and won't—change

Article

“[Cookie deprecation] is a monumental change. It has also been a long time coming,” our analyst Evelyn Mitchell-Wolf said on a recent [“Meet the Analyst” webinar](#). The signal loss will force advertisers to shift targeting strategies, campaign measurement, and identity solutions. But other trends—direct remains the dominant **programmatic** transaction method and **connected TV** (CTV)’s growing share of ad spend—will stay their course.

## What cookie deprecation will change

**1. Historical benchmarks lose meaning.** “Just like cookieless targeting looks different, requiring different methodologies, so does cookieless measurement,” Mitchell-Wolf said. For example, that will mean performance tracking for this year’s holiday campaign may not be as comparable to years’ prior.

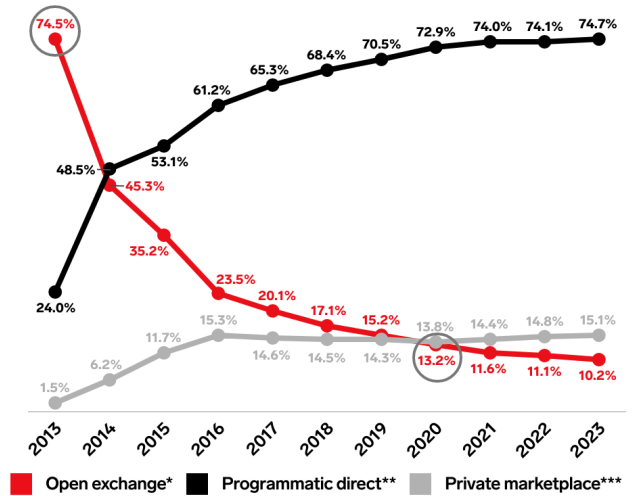
As a result, advertisers are relying more on the consumer data they have available. Six in 10 brands and agencies say they will be more focused on ad placements with publishers with first-party data in 2024, according to November 2023 data from the Interactive Advertising Bureau.

**2. Identity providers consolidate.** There are more than 110 identity providers, according to Prohaska Consulting, which isn’t sustainable, Mitchell-Wolf said. “A deterministic identifier’s effectiveness is predicated on scale. Those that don’t get enough traction won’t last long once third-party cookies are gone, while smaller providers with high-quality data, tech, or methodology may get acquired.”

## What cookie deprecation won’t change

**1. Programmatic open auctions are trending out.** In under a decade, the open exchange went from the most popular transaction method to the least, overtaken by programmatic direct in 2014 and by private marketplaces in 2020. Although spend on the open exchange is still growing, it will continue losing share of the overall programmatic display ad market, accounting for only 8.5% of spend in 2025.

**In Less Than a Decade, the Open Exchange Went From Most to Least Popular Transaction Method**  
 % of US programmatic digital display ad spending, by transaction method, 2013-2023



Note: includes native ads and ads on social networks like Facebook and X; includes advertising that appears on desktop/laptop computers, mobile phones, tablets, and other internet-connected devices; includes programmatic ads that are transacted in real time, at the impression level; \*includes ads transacted through a public RTB auction in which any buyer or seller can participate, also known as open auction or open marketplace; \*\*includes all programmatic ads that are transacted as blocks of inventory using a non-auction-based approach via an API; \*\*\*includes ads transacted through an invitation-only RTB auction where one publisher or a select group of publishers invites a select number of buyers to bid on its inventory  
 Source: Insider Intelligence | eMarketer Forecast, Dec 2023

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Investing in direct buying paths helps advertisers reduce hidden fees, alleviate frequency problems, lowers the risk of data leakage, and decreases their carbon usage, said Mitchell-Wolf.

**2. CTV claims more shares of programmatic spend.** Last year, CTV overtook desktops and laptops in programmatic display ad spend. CTV will account for more than a quarter (25.6%) of the programmatic video market this year. “Consumers are averaging less daily time on computers and more than making up for it on their TVs,” Mitchell-Wolf said. “Advertisers are adjusting their programmatic ad spend accordingly.”

Although **mobile** still dominates, thanks to the stronghold of programmatic spend on social platforms, CTV’s growth will persist. “With a steady drumbeat of cord-cutting looming over the industry, streaming and programmatic will play a bigger role than ever in this year’s upfront negotiations,” Mitchell-Wolf said.

**Watch the full webinar.**

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