

# Meta calls out AppTrackingTransparency as anti-competitive

Article

**The news:** Meta went after **Apple** for its **AppTrackingTransparency** (ATT) policy and other restrictions, which it called “self-serving,” in a [request](#) for comment with the **National Telecommunications and Information Administration** (NTIA) about the state of competition in the mobile app industry.

- The filing follows an April request from the NTIA for [public comments](#) regarding the mobile app ecosystem.

**How we got here:** ATT was, and continues to be, a dramatic shift to the mobile advertising ecosystem. [Over a year later](#), companies are still struggling to develop ad solutions and revenues have dropped significantly.

- More users have opted in to ad tracking than many feared (37% compared with projections ranging from 2% to 20%), but revenues are still down significantly. Between **Twitter**, **Snap**, **Meta**, and **YouTube**, \$16 billion in revenue will be lost this year, according to data management firm Lotame.
- Meta itself said it expects to lose **\$10 billion** in 2022 because of ATT.
- But while Meta's profits drop, Apple has benefited greatly from ATT. The change greatly increased the value of first-party data and caused App Store search ad revenue to grow 236% last year to **\$3.7 billion**. "Services" which includes advertising, is now the [fastest growing](#) category at the company.
- The fact that Apple is going strong while companies dependent on its platform [spiral](#) is one of the biggest points in favor of the argument that ATT is anti-competitive.

**Analyst take:** "Meta has oodles of first-party data since it owns multiple platforms where the majority of users are logged in," said **Evelyn Mitchell**, digital advertising and media analyst at Insider Intelligence. "While the argument that the data 'have nots' will struggle is well taken, Meta is very much a data 'have.'"

**What is ATT's future?** Other companies will likely chime in alongside Meta criticizing Apple and ATT, but tightening of privacy regulations in key markets like the EU, UK, and US mean the change will probably stick around.

- ATT has also caused ad budgets to shift to [different advertising formats](#) to work around the change, opening up new advertising opportunities for [legacy retailers](#) and broadening Android's share of the digital advertising pie.

US Opt-In and Adoption Rates for App Tracking Transparency (ATT) and iOS 14.5, Dec 2021

% of users



Note: ATT opt-in rate is defined as the share of users with any version of iOS 14 (not only 14.5+) who opted-in to "tracking" via the ATT prompt; iOS 14.5 consumer adoption rate is the share of app sessions with version 14.5 or higher  
Source: AppsFlyer, "The Impact of iOS 14+ & ATT on the Mobile App Economy," Dec 21, 2021  
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