



# THE MARKETER'S PLAYBOOK

Cookies, Device IDs, ID Syncs

## Playbook Intro

The Marketer's Playbook is an intuitive visual series of Marketing and Advertising concepts. Our goal is to equip you with the tools you need to become the guru in your organization. Whether you are new to the Marketing and Advertising World or you are a Veteran, we are sure that you will enjoy the content we prepared for you.

- *Softcrylic*

# Glossary

## **Cookie:**

An HTTP cookie is a small piece of data sent from a website and stored on the user's computer by the user's web browser while the user is browsing.

## **Server:**

A computer system that processes requests via protocols such as storing, processing and delivering webpages in a browser.

## **Browser:**

A software application for retrieving, presenting and traversing information resources on the World Wide Web.

## **Javascript:**

A programming language used to make webpages more interactive. It is heavily used behind the scenes to script processes as websites are loading.

## **Browser Plugin:**

A packaged snippet of code with a user interface designed to execute specific processes on a browser. Also known as an Extension.

## **GDPR:**

A new EU regulation known as General Data Protection Regulation going into effect on May 25, 2018.

## **ID:**

A unique string of characters and numbers used to identify a user.

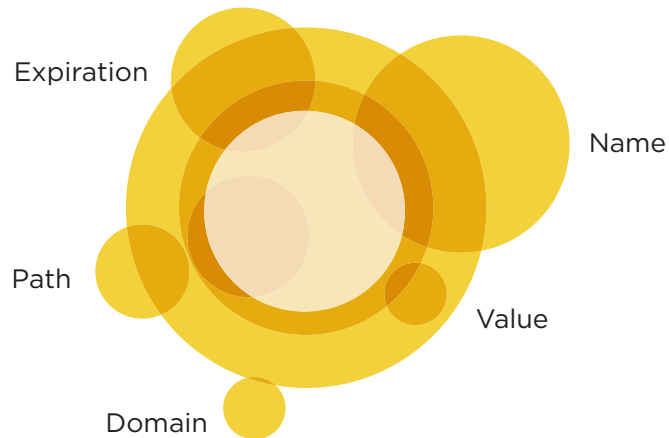
# Index

## Page

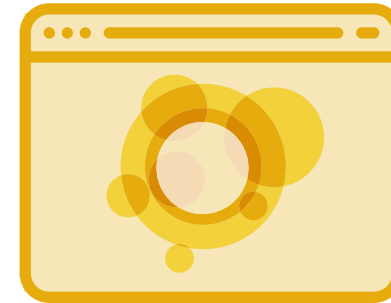
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# The Cookie

## Ingredients



- Name:** A way to identify the cookie (such as loyalty\_number)
- Value:** A Numeric, ASCII or a combination of characters (such as BHWY18923)
- Domain:** A http address of where the cookie is defined (such as softcrylic.com)
- Path:** A restricted scope of where the cookie belongs to. The default is the domain and subdomain of where the cookie is set unless otherwise defined (such as /)
- Expiration:** A time frame on when the browser should delete this cookie (such as 24 hours)



Browser with cookie embedded

## Application



### Authentication

- Logged in state
- Account Type
- Secure cookies
- Session based

### Personalization

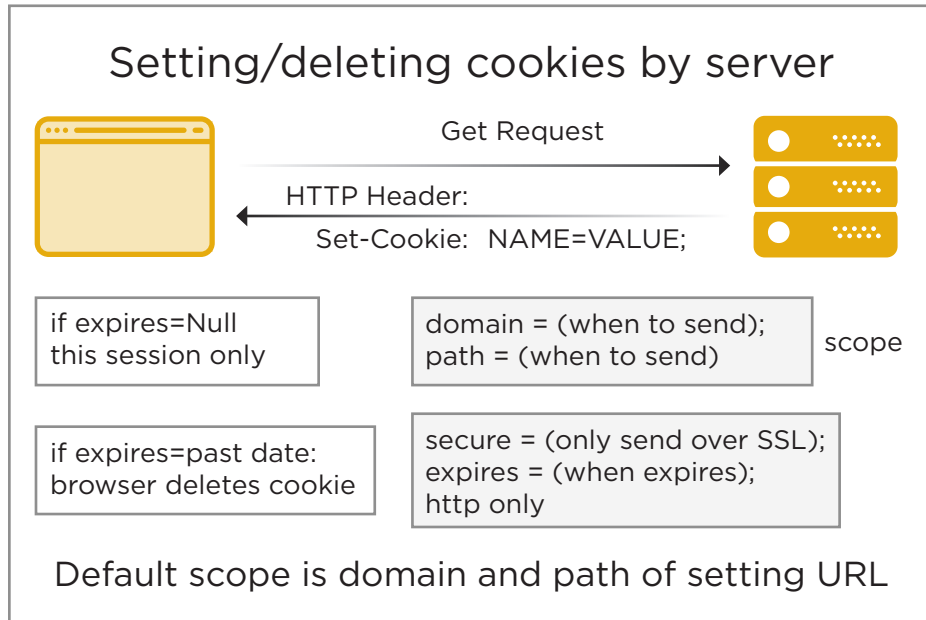
- User Preference
- Products Viewed
- 3<sup>rd</sup> Party Cookies
- Long lifetime

### Tracking

- Site Analytics
- Cross site Identifiers
- 1<sup>st</sup> and 3<sup>rd</sup> Party Cookies

# How cookies are set

## Via Server



This is the most common way of setting a cookie. It is initiated by a server call from the browser to a remote server. The response from the server to the browser sets the cookie.

**Example:** Adobe Experience Cloud cookie: AMCV  
Google Analytics cookie: `_ga`

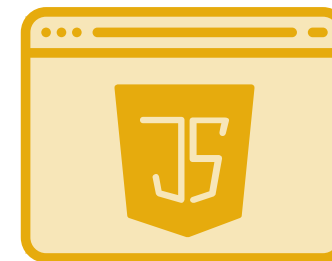
## Plugin



This is the least common way to set cookies on a browser. It is mostly used in testing and QA.

**Example:** `EditThisCookie`

## Via Browser/Javascript



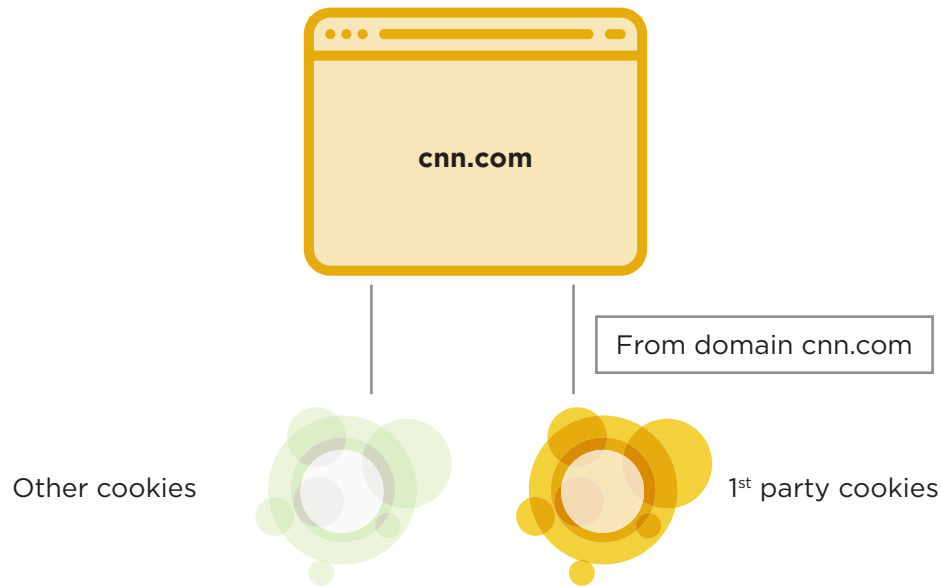
In some cases, server calls will timeout and fail at setting a cookie. Many services have a fall back functionality to set a cookie via the browser

**Example:** `document.cookie = "value=browser; expires=Thu, 18 Dec 2020 12:00:00 UTC; path=/";`

# 1<sup>st</sup> Party Cookies

## What makes a cookie 1<sup>st</sup> party?

A cookie is 1<sup>st</sup> party when it exists in the domain that set that cookie

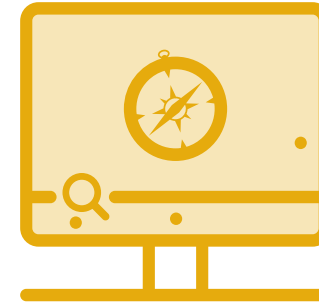


## Benefits

- Blocked by fewer browsers
- Set mostly by publishers and branded domains

# Safari Intelligent Tracking Prevention (ITP)

A feature of MacOs 10.13 and iOS 11. Apple changed the rules on how a technology can access 1<sup>st</sup> party cookie in a 3<sup>rd</sup> party context.



1<sup>st</sup> party Cookie set on Advertiser Primary Site.



24 hour window to access cookie in 3<sup>rd</sup> party context



After that, only accessible on Advertiser Primary Site.



24 hour window restarts

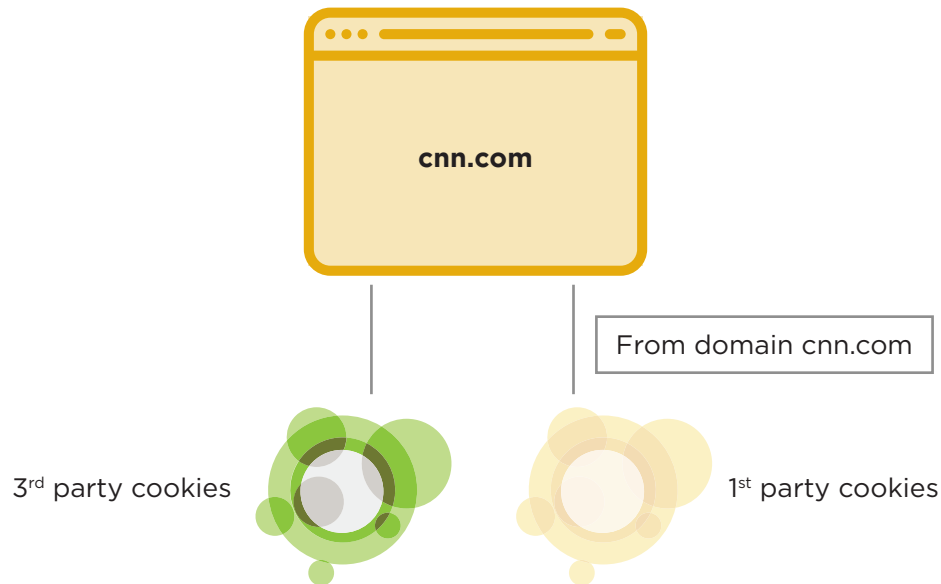


If the user doesn't return to the primary website within the next 29 days, the 1<sup>st</sup> party cookie will be entirely deleted.

# 3<sup>rd</sup> Party Cookies

## What makes a cookie 3<sup>rd</sup> party?

A cookie is a 3<sup>rd</sup> party cookie on every website other than the one domain that set the cookie.

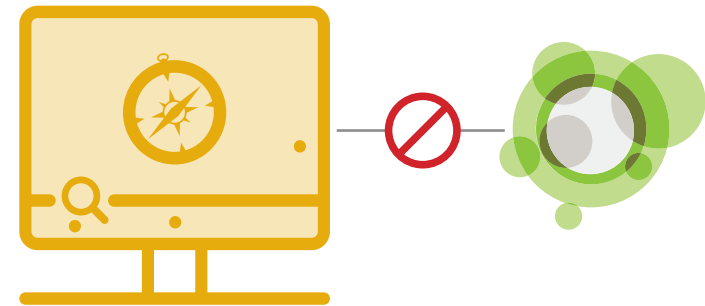


## Benefits

- Retargeting and Personalization for Publishers and Advertisers
- Recommendations via predictive modelling based on browsing and buying behavior.

## Drawbacks

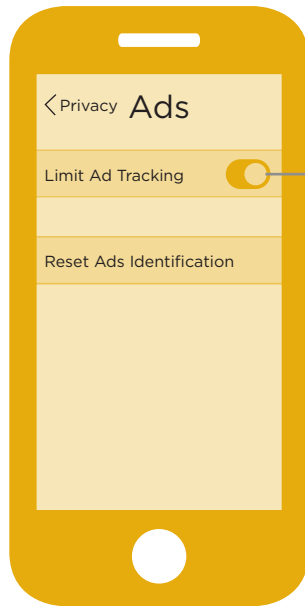
- Deleted and reset often
- Blocked by Safari by default. Chrome might enable blocking them by default in the future
- Bad reputation for being insecure



## Safari Intelligent Tracking Prevention (ITP)

- No impact since Safari blocks 3<sup>rd</sup> party already

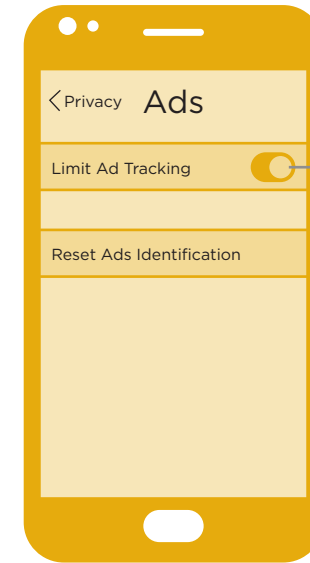
# Mobile IDs



Switch this to "on"

## IDFA

- Identifier for Advertiser. A universal ID to identify a user's apple device across all apps on the device.
- A super cookie on your phone recognized by all advertising technologies.



Switch this to "on"

## AAID

- Android's Advertiser ID. A universal ID to identify an Android device across all apps on the device.
- They are like a super cookie on your phone recognized by all advertising technologies.

### Notes:

IDFA and AAID are not the same as the cookies set on a browser in a mobile phone. Only applies to mobile Apps.

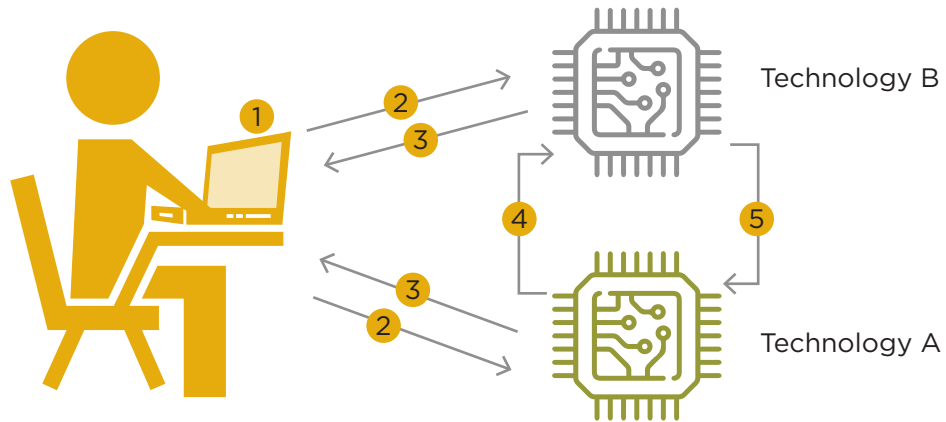
Both can be reset or disabled in the phone settings.



# ID Syncs

Every Marketing Technology identifies web or mobile visitors differently by setting their own ID. For these technologies to exchange data, they need to sync their IDs.

## How it works?



1. Visitor lands on site or opens app
2. Server calls fires to technology A and B
3. Both set cookies or ids in their response
4. & 5. Via redirect, these technologies exchange IDs

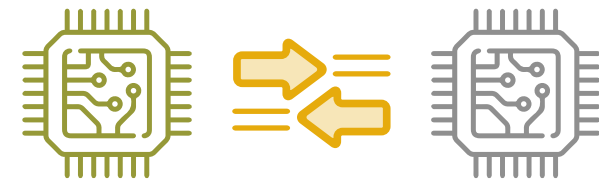
## Result



Mapping table at Technology A

Mapping table at Technology B

## Value



Data flow between both technologies

## Use Cases



Customer Journey



Personalization



Programmatic Advertising



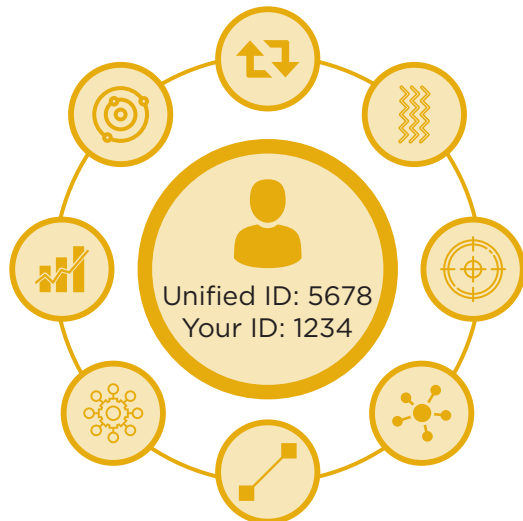
Connected Experience

# Marketing Stacks Cookies

Without a Marketing Cloud Visitor ID (Solution-Specific or Legacy ID)



With a Unified Visitor ID



## Goal

Create a single ID that identifies a user across multiple products within a technology stack. This allows cross solution data stitching, personalization, analysis and measurement. This relies heavily on ID Syncs to make sure that all the tools are connecting to the same ID and identifying the same visitor.



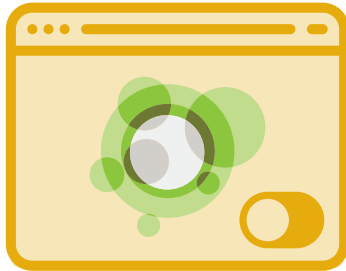
Adobe leverages the Marketing ID (MID) parameter that is embedded in a first party cookie (AMCV) and synced to every product in the experience cloud via browser server calls.



Salesforce leverages multiple IDs to identify visitors across the Marketing and Sales Cloud. One commonly used integration is between Salesforce DMP (KruX) and the Marketing cloud. The common id is either a hashed email address or subscriber id.

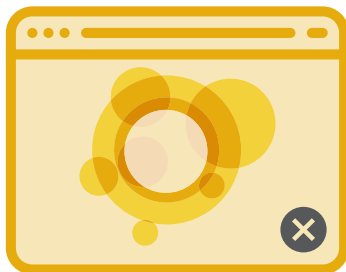
# No Cookies or Ids

## Disable 3<sup>rd</sup> Party cookie



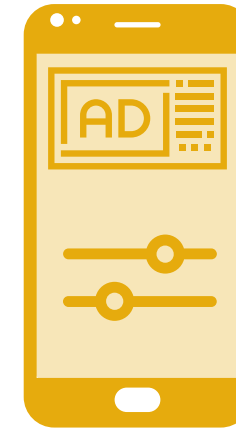
Some browsers such as Safari disable 3<sup>rd</sup> party cookies automatically, while others give you the option to disable manually. Disabling cookies will impact an Advertiser's ability to track you across websites. This limits the retargeting, personalization and recommendation capabilities of an Advertiser.

## Delete Cookies



You have the option to delete your cookies in your browser. Upon deletion, all information associated with your original cookies become obsolete and you are assigned a brand-new set of cookies. It is a clean slate. **Marketers don't like that!**

# Limit Ad Tracking



On mobile devices, you can limit the type of data collected by Mobile Apps. You will still have a mobile device ID associated with your device, but no attributes linked to this device will be sent to Advertisers. As a result, you will see less personalized Ads on your mobile.

## Opt-Out

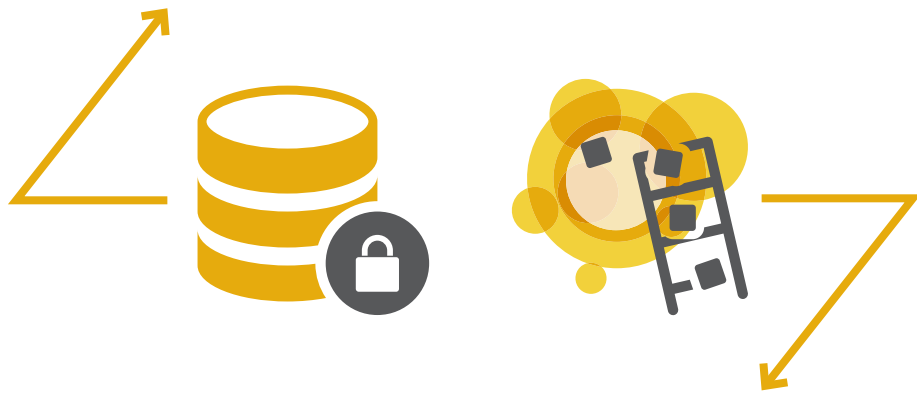


Every consumer has the option to opt-out from marketing and advertising campaigns. This means you will be placed in an opt-out list that should not be targeted.

# EU: GDPR & Cookie Law

## What is GDPR?

General Data Protection Regulation will go into effect on May 25, 2018 and is applicable to citizens of the European Union but not limited to only EU based brands. GDPR gives the consumer control of what data can be collected by Advertisers. Upon visiting a brand's website, the consumer must be presented with a clear and detailed consent form outlining the type of cookies and data that the brand intends to collect. The new regulation also gives consumers the ability to wipe out the data upon request.



## Impact on Cookies and Device IDs

Depending on what the consumer agrees to in the consent form, this may limit the type of cookies that can be set on the consumer's browser. The new law treats mobile device IDs and IP addresses as Personal Identifiable Information (PII).

# Cookie Law / ePrivacy Directive



Not to be mistaken with GDPR, Cookie Law/ePrivacy Directive focuses on the cookies. This means advertisers need to gain explicit consent for every cookie they set in a consumer's browser. It is not very clear, but this will most likely impact 3<sup>rd</sup> party cookies, dramatically.

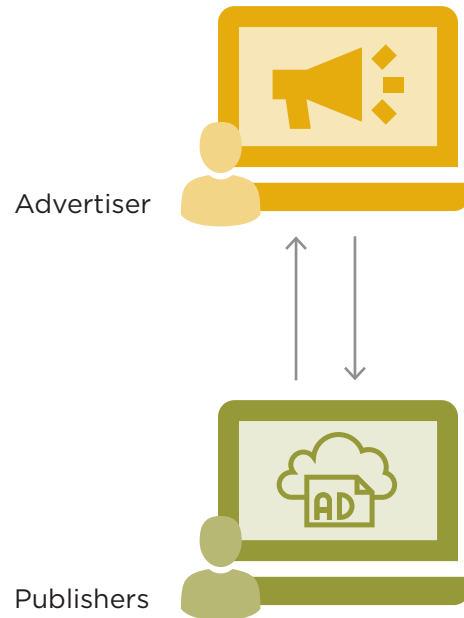
## Does this impact me?



There is a misconception that GDPR will only impact EU based brands. In reality, it will impact any brand that collects data from EU citizens, including brands operating around the world. There are penalties with a hefty fee in the event a brand doesn't comply with GDPR: 20 Million Euros or 4% of their overall turnover.

# How Marketers leverage cookies?

## Programmatic Advertising



Also known as Ad buying, programmatic advertising allows advertisers to buy inventory from publishers to place Ads in an automated fashion, without any human negotiation or manual interaction. The exchange of goods is based on information the parties have on the consumer. Cookies, especially 3<sup>rd</sup> party cookies, are key to the success of programmatic advertising. Cookies are used to identify the consumer and the consumer's associated attributes. In the absence of cookies, deletion or opt-out, consumers are more likely to be exposed to a generic ad.

## Analytics

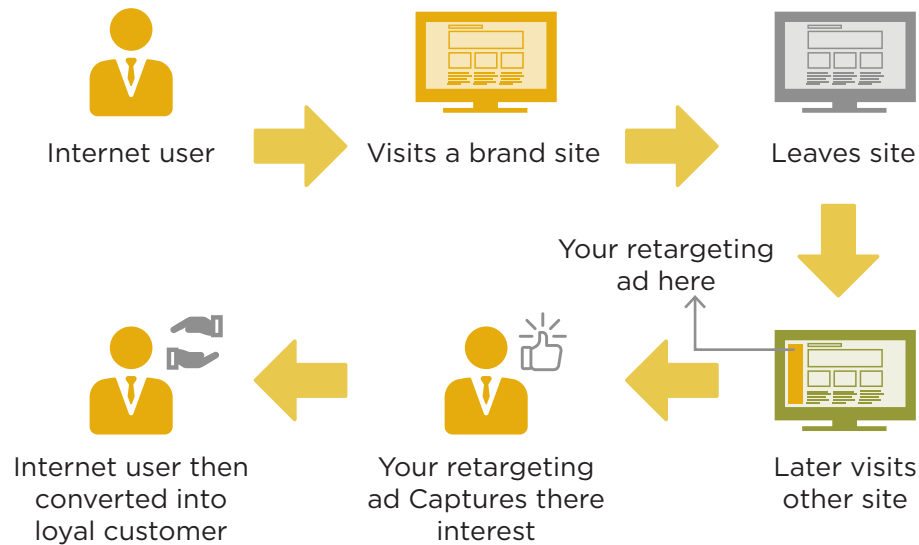


In addition to being essential to identifying a consumer within an analytics platform, cookies are used to store a hashed customer ID. The hashed customer ID is used to stitch together user activities across multiple browsers and devices for a full view of the consumer's digital footprint.

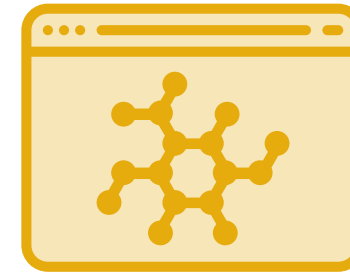


# How Marketers leverage cookies?

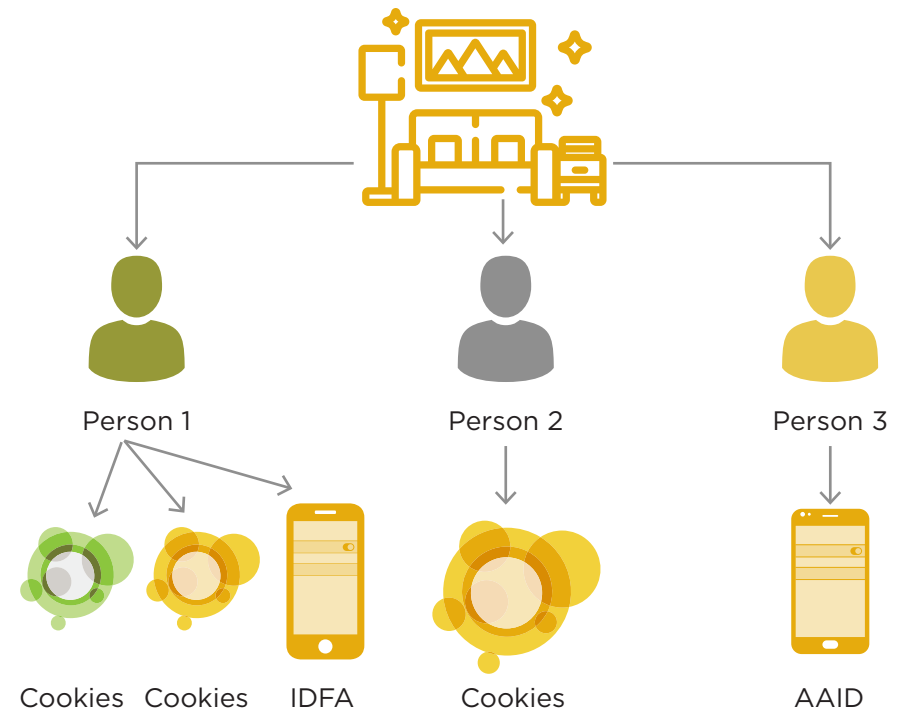
## Targeting & Retargeting



As consumers visit a brand's website, they are identified via a cookie in their browser. The brand will have historical attributes associated with this cookie that can be used to qualify a consumer for targeting or retargeting campaigns. This can take place on either the brand's website or another's via programmatic ad buying. 1<sup>st</sup> and 3<sup>rd</sup> party cookies are used to track consumers on and off-site, allowing brands to target and retarget them.



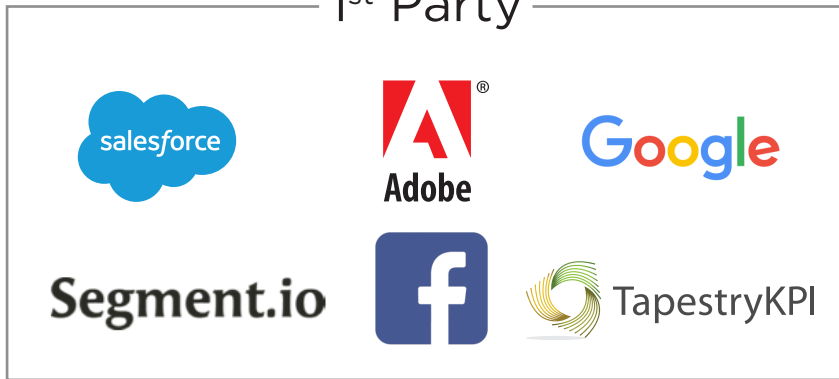
Device Graphs, also known as Identity Graphs, were the hottest commodity of 2017. These graphs represent a map that links consumers to the cookies and devices they use.



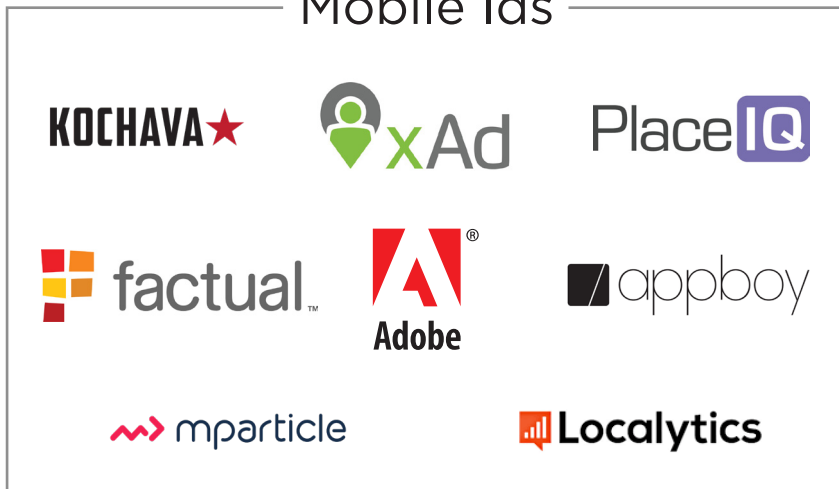
Brands use device graphs to target consumers on devices, regardless of whether they used the device to visit the brand's website.

# Cookies & Tools

## 1<sup>st</sup> Party



## Mobile Ids



## 3<sup>rd</sup> Party



## About the Author



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Digital Experience Architect



Jerry Helou leads the Digital Experience Architecture practice at Softcrylic. He helps our clients accomplish advanced digital experiences and strategic business goals by implementing and leveraging multi-solution architecture.

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## About Softcrylic

Softcrylic helps organizations navigate and execute the path of Digital Transformation through IT solutions and services in a variety of technical disciplines including Software Development, Test Engineering, Data and Analytics. Since 2000, Softcrylic has worked with both start-ups and Fortune 500 organizations to help make their company goals a reality. For more information, go to <https://www.softcrylic.com> to learn more.

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