The Imminent Demise of Unconsented Data

How Apple & Google's changes will impact travel data...

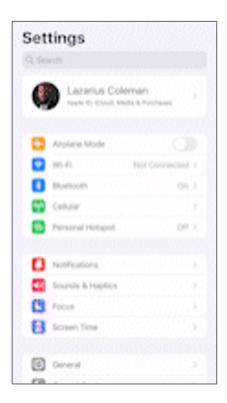




Do you have an iPhone?

Let's make this conversation less abstract...

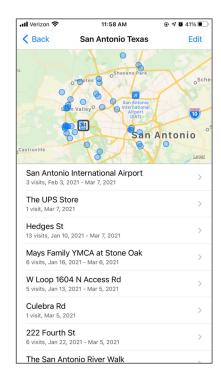
- 1. Go to "Settings"
- 2. Go to "Privacy"
- 3. Go to "Location Services"
- 4. Scroll to the bottom & click "System Services"
- 5. Go to "Significant Locations"
- 6. Use Face ID / Touch ID to Authenticate
- 7. Under History, you'll see a list of locations you visited...click one...
- 8. You should see your location history...click one...

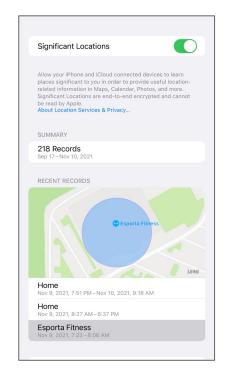




You should see one of these images

Apple is increasingly hiding this data from the user, but they're still tracking it...



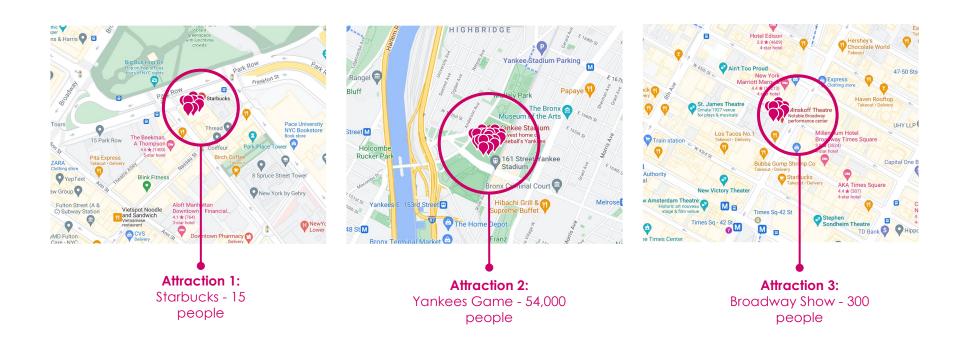


iOS 14

iOS 15

Location data can tell a powerful story

You can see everywhere a visitor went in your destination...



Apple released 2 updates in 2021...

These updates prevent you from tracking of iPhone location without permission...



App Location Data

iOS 14.5 prevented the use of Apple's device ID for retargeting their users across the web.



IP Location Data

iOS 15 prevents the tracking of iphone location without explicit permission.



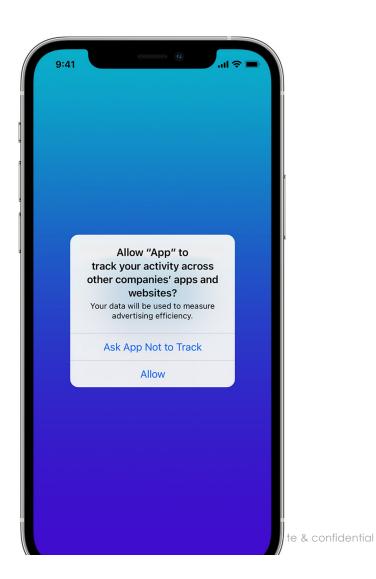
The first update made this popup...

This prevents you from retargeting iOS devices...



App Location Data

iOS 14.5 prevented the use of Apple's device ID for retargeting their users across the web.

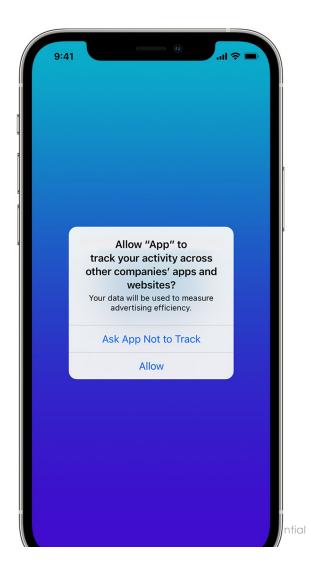




iOS 14.5 forced Apps to request consent

Have you seen this popup?

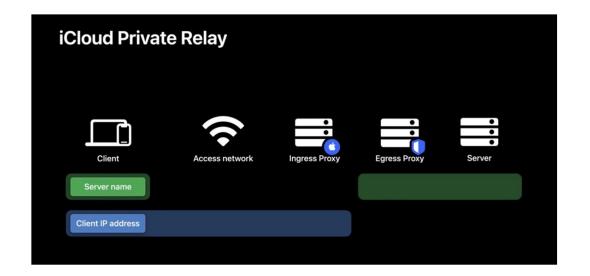
- This popup began showing in April of 2021:
 - Millions of users have opted out.
- 2. The data for tracking is limited:
 - Unconsented location was blocked in September of 2021
 - Very few are willing to share their location (around 5-15% | AppsFlyer, 2021)
- 3. Users don't want to opt in:
 - People can now determine if SUDOKU should get to track their activity.
 - For location tracking, most choose "allow while using"
 - Poor **battery life** can deter data sharing.





iOS 15's Private Relay...

These prevent tracking the location of iOS devices...







Let's simplify Private Relay...

Analogy time...





Accessing a webpage works like a "Mail Order Catalog"

Your name & location are shared with whoever touches your request, so they know where to send your goods...



Accessing a webpage works like a "Mail Order Catalog"

Because of this, unknown persons have access to your purchase history and can link that back to your identity & location.







John Doe's Order: Poo-Pourri, Back Shaver & Toilet Ring Remover

Google: Poo-Pourri Commercials

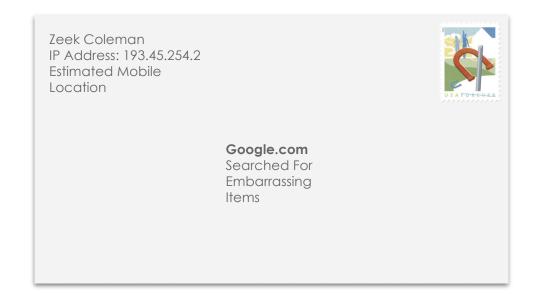
Check it out when you have some time...





Accessing a webpage works like a "Mail Order Catalog"

Your IP Address is like a "return to sender address", so websites know where to send the website you've requested...



Accessing a webpage works like a "Mail Order Catalog"

Because of this, unknown persons have access to your browsing history and can link that back to your identity & location.

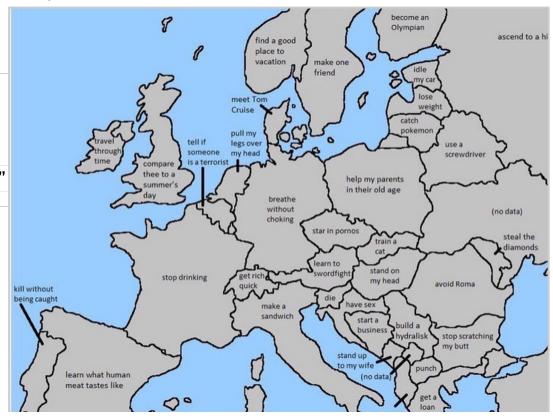


Similar Data, but for Europe!

Because of this, unknown persons have access to your browsing history and can link that back to your identity & location.



- Travel through time
- Kill without getting caught
- Steal the diamonds
- Make one friend
- Catch pokemon
- Find a good place to vacation



Apple's Response?

Zeek Coleman IP Address: 193.45.254.2 Estimated Mobile Location



Google.com

Searched For Embarrassing Items

Apple's Response?

Apple is disconnecting your identity & location from the websites you visit...



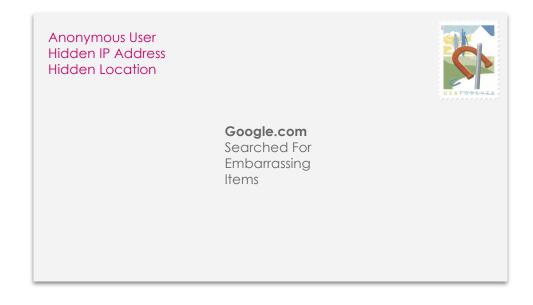
How it works:

So Apple's service knows your location, but **not** the website you're visiting.



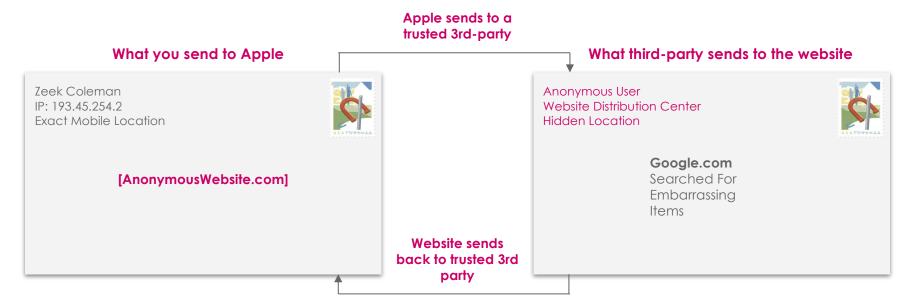
How it works:

The websites you visit know where to send your webpage, but **not** where you're located...



The NEW Internet Process with Apple's Private Relay

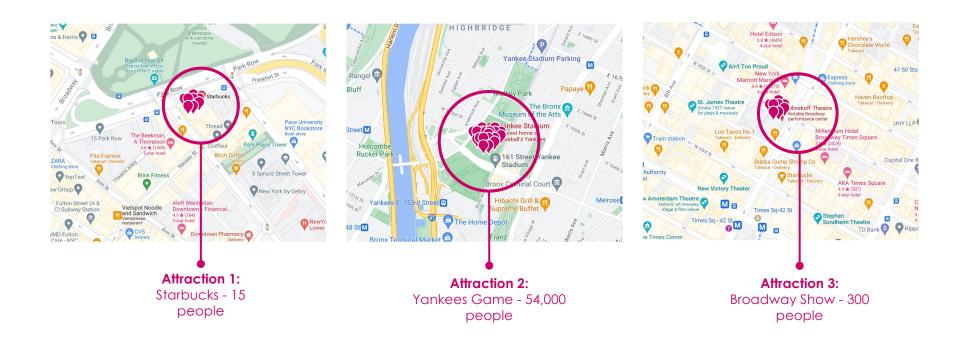
Apple knows you, but not the sites you visit and websites know where to send the request, but not your location or personal identity.



...your request goes to an anonymous 3rd party, to hide your location & identity.

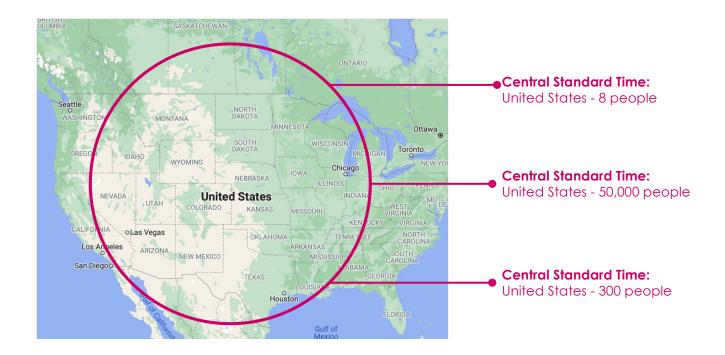
Say goodbye to this level of accuracy...

It will be more difficult to reliably tell your destination's story...



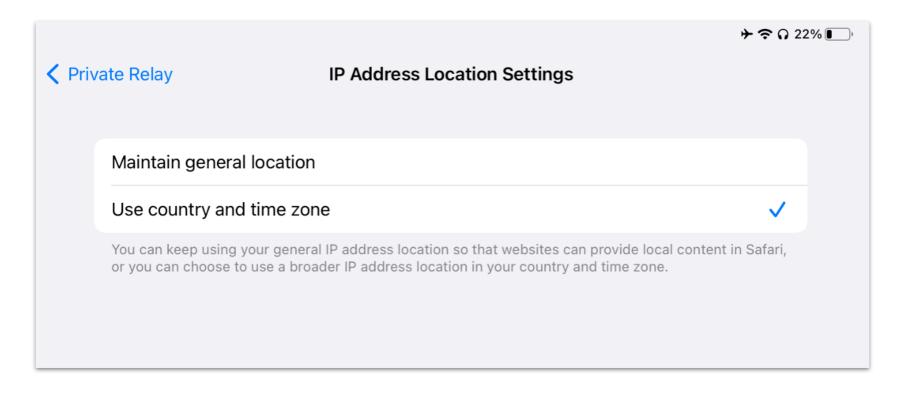
Say Hello to Country + Time Zone accuracy...

The ability to tell stories with accuracy is on borrowed time...



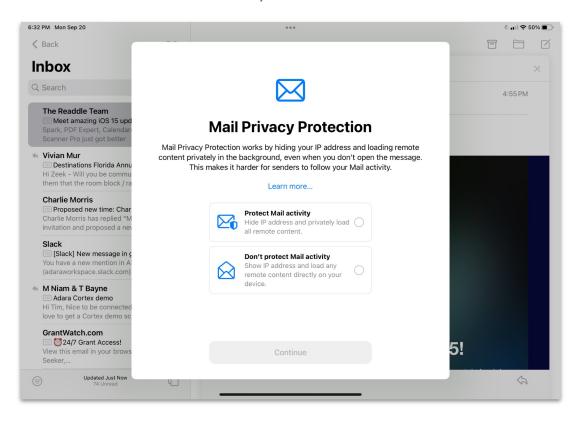
Real Example: Country + Time Zone Location

Millions of Users are having their location hidden...



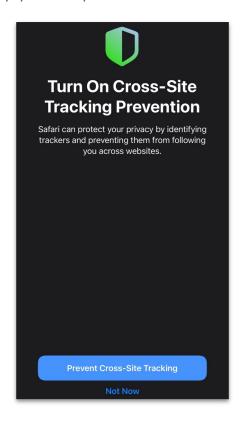
This also applies to Email...

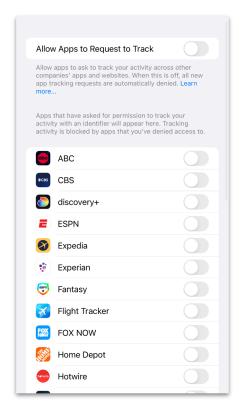
Unconsented location wasn't the only one to take a hit...

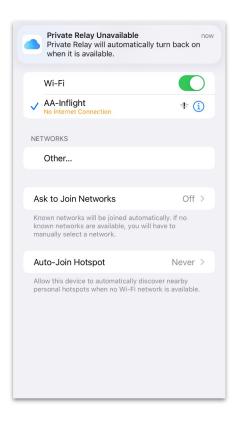


This is what it looks like when users upgrade...

Apple explains the benefits of privacy to people in simple terms...

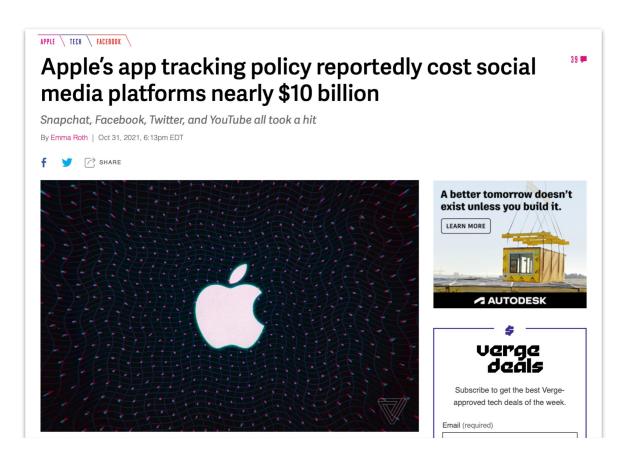






Why should you care? Billion dollar impact...

Have you seen the recent headlines?

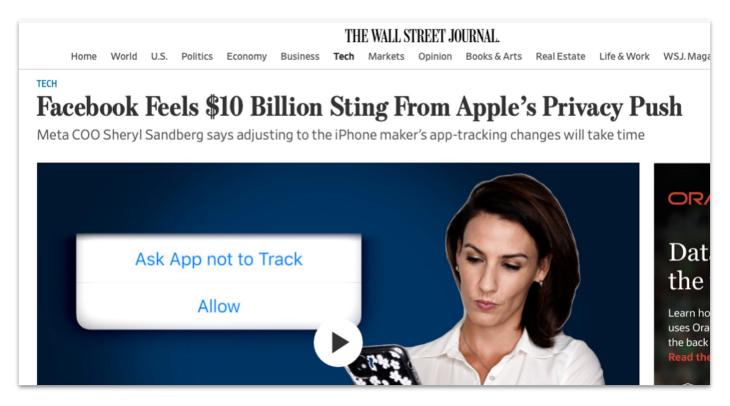




Adara private & confidential

Facebook had its worst day on Wall Street ever...

Without data for retargeting, advertising is much less accurate...





Mark Zuckerberg lost \$31 Billion...with a B.

How much has it cost you?

FINANCIAL POST

Personal Finance / News / High Net Worth

Mark Zuckerberg's fortune plunges by \$31 billion after Meta shock

It's among the biggest one-day drops in wealth ever



Feb 03, 2022 • February 3, 2022 • 2 minute read • 18 Comments



Adara private & confidential

Meta lost \$251 Billion...

Checked your investment accounts lately?

Bloomberg

Meta Erases \$251 Billion in Value, Biggest Wipeout in History

- Shares slump 26%, dragging down Snap, Pinterest, Twitter
- Wall Street cuts price targets on Meta shares after earnings



Google is adopting similar changes...

Checked your investment accounts lately?



Google is adopting privacy changes on Android similar to the ones Apple made on iPhone that cost Facebook billions of dollars

- Google just announced plans to change how apps like Facebook can track Android phone users.
- It's similar to a change Apple made last year to iPhone, which stops apps from tracking you across apps.



Why should DMOs care? By 2023...

You will **NOT** be able to use unconsented location data to:



Re-target devices of past visitors to a specific business or location



Gain insights into customer behaviors based on location activity



Measure how your ads drove key business outcomes



Report on results with confidence to key stakeholders



Wisely re-invest funds where goals can be accomplished

Questions to Ask Media & Data Partners

5 questions to ask your data providers...



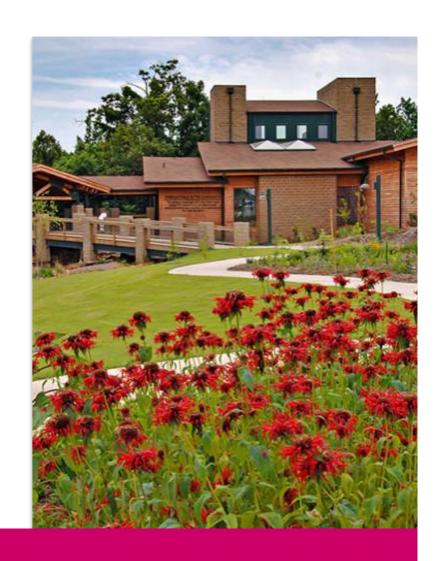
- 1 How much of your data comes from Android or iPhones?
- 2. How will you do retargeting w/o Apple or Google data?
- 3. How will you gain insights w/o this data?
- 4. Will you allow a match test on the quality of your data?
- 5. Can you explain your solution to me in simple terms?



The Cookie-less Dilema

What Google is doing to increase the size of their "walled garden"





Why are cookies going away?

People like their privacy...

Consumers are being faced with more information on consumer privacy...







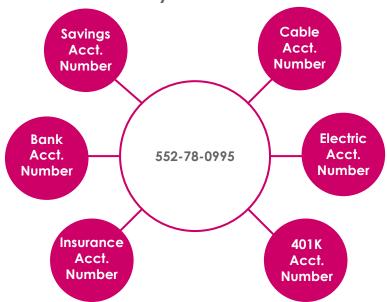




What is a 3rd-Party Cookie?

A tracking tag placed on your device to follow your every move...

Like your SSN, it can be used to link to other IDs you have...



Cookies link your online activities across Web IDs...





What is a 3rd-Party Cookie?

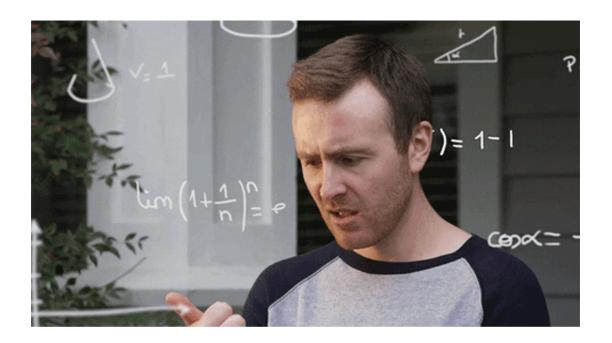
It's like a private investigator...OR...





Let's simplify it...

Hopefully this analogy can help...





What is a 3rd-Party Cookie? It's like Rhino Tagging...

A nature preserve might tag a rhino to gain information on them...



Photo: National Geographic



Wisconsin preferred Badgers...

Cute little fella...







Adara private & confidential

Wolf, Tarheel or Blue Devil Tracking?

Not trying to start a fight though...









We'll stick with Rhinos for now...

A nature preserve might tag a rhino to gain information on them...

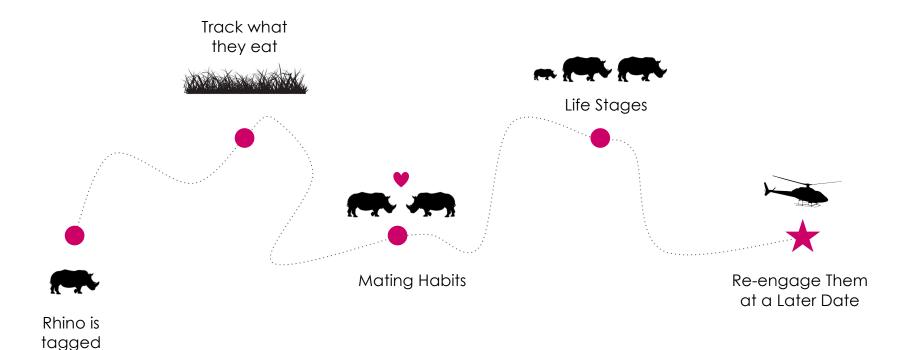


Photo: National Geographic



Tagging allows you to track formerly private behaviors...

An individual rhino's personal life is no longer a mystery...





Your devices are the Rhino, allowing us to track formerly private behaviors...

An individual's personal life is no longer a mystery...





Imagine this data goes into a giant spreadsheet...

This is how ads follow you around the internet after you do online shopping...



Most Rely On 3rd Party Cookies:

- The data collected is matched to users' online identities without their permission.
- Those users can be served relevant content based on what they've seen online.



Where can you activate this personal information?

Anywhere your Rhinos...er, users might travel online...





This is how ads follow you around the web...

Destinations can also use this data to follow travelers across the web...



"Jane" browses winter coats on your site



"Jane" sees your retargeting ad on other sites



"Jane" returns to buy a coat on your site



But what is Google doing to take this away?

Let's change our analogy a bit...

Your Site on Google Chrome is like a projection on a screen...







But what is Google doing to take this away?

Let's change our analogy a bit...

Cookies are like a thumbtack that has to be poked into that screen to track your behavior...







But what is Google doing to take this away?

Let's change our analogy a bit...

Google is updating Chrome to be projected on an iron wall, so thumbtacks can't poke through the wall...no more cookies...







Rhino Tagging Outlawed On Google Chrome

In Google's ecosystem, Rhino's cannot be tracked...



Photo: National Geographic



Activations

It'll be harder to market as efficiently as you used to...





This means no more re-targeting via 3rd Party Cookies

Without relevant data, targeting across the web becomes more difficult...





What Does This Mean for Destination Marketers?

Destinations will **NOT** be able to:



Re-target past customers and visitors



Know **who is coming** to the destination and where they are coming from



Measure how your ads drove key business outcomes



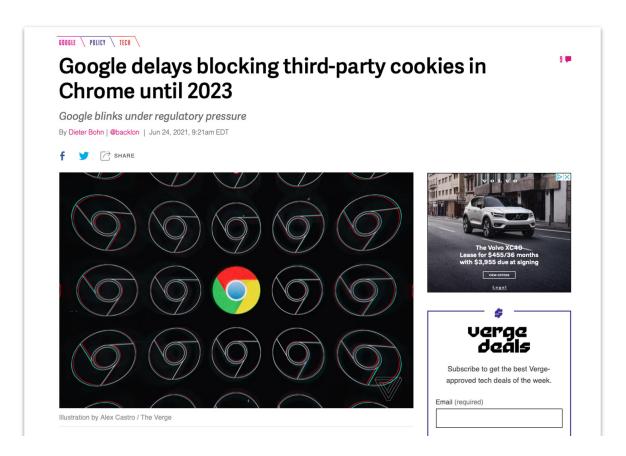
Report on results with **confidence** to key stakeholders



Wisely re-invest funds where goals can be accomplished

News Headline: "Rhino Tagging Outlawed On Google Chrome"

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How Much Will This Change Cost?

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What's the solution? Stream your data from the source...

You're sitting on a treasure trove of data with your website alone...you just need the technology for onboarding and enriching it...that's where Adara comes in...





Adara's technology streams the data directly from our partners' sites...



How You Can Prepare? 3 Ways:

Rely on consented data...

1

2

3

Use Consented Purchase Data

Adara's purchase data from Commerce Signals covers 40% of US spending and can be leveraged to measure inmarket spend w/o buying an ad campaign

Use Consented Travel Data

Adara has access to over 1.8

Billion privacy compliant profiles. These are onboarded and leveraged for targeting, measurement & reporting on your digital assets.

Build Your Own Data Hub

Adara's technology is available for you to leverage for the collection of privacy compliant data. Don't reinvent the wheel...use ours.



Comparing Payments Data to Unconsented Location Data

Rely on that which is reliable...

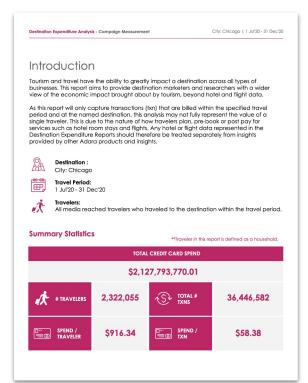
	Payment Data	Unconsented Location Data
Store visits	✓	~
Buyers and basket size	✓	
Online, instore, in-app, BOPIS, delivery	✓	
Always on	✓	
Accuracy	✓	
Coverage*	~	



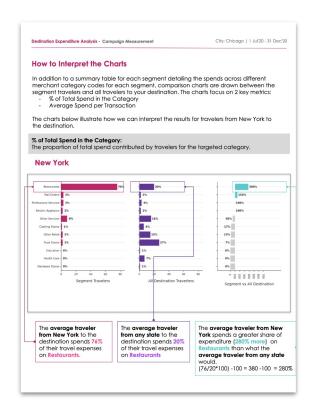
^{*} Potential to be higher depending on the source

Destination Expenditure Reporting

How travelers are spending across categories & merchants while in market...









Different than the rest...

Marketing ROI like you've never seen before...

Key Differentiators of this Report:



We see **40% of all US based transactions**, accounting for about \$2.7 Trillion in spending.



This is about 5 times higher than our closest competitor.



We collect spend across **Visa**, **Mastercard & Discover**.



We see **Credit & Debit Cards** which increases visibility.



We can provide spending across 31 different merchant categories: from restaurants to hotels to recreation to retail, and more.



We can show you the **top 10 businesses** in each merchant category.



We developed this specifically for **Tourism & Hospitality brands**



Most reports are focused on helping **individual merchants** in a destination instead of visitor spending for a destination.



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Adara Streams Global Travel Data, Right from the Source

Bookings from Airlines, Hotels, Restaurants, Experiences, Rentals & more...





This Allows for a Massive Global Footprint

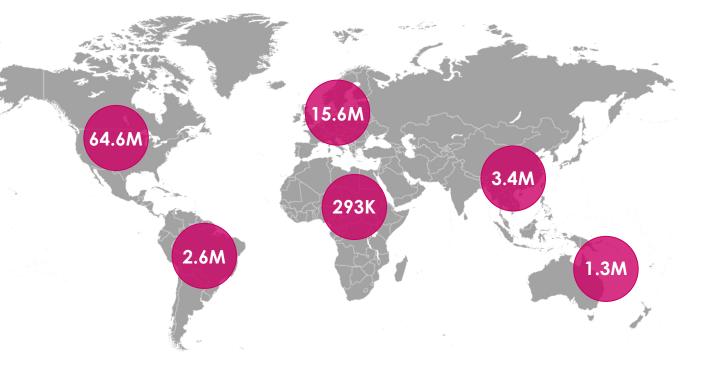
1.7 Billion rich profiles that include, on average:

30+ data points per profile

Over 2.5+ Billion hashed emails

3 Billion travel searches annually

180 Million air and hotel bookings annually





Adara Has The Most Complete Travel Profile



- Trip dates
- Origin and destination
- Avg. Daily Rate
- Avg. Airfare
- N. of Travelers
- Hotel Brand & Property
- Provider
- Alternate destinations
- Class of service



- Trip dates
- Origin and destination
- Avg. Daily Rate
- Avg. Airfare
- N. of Travelers
- N. of Adults & Children
- Hotel Brand & Property
- Booking Provider
- Booking Class
- Purchase Timeline



- Loyalty membership
- Membership level
- Points balance
- Co-brand credit card holder



- Demographics
- Cookies
- Device IDs
- Email address



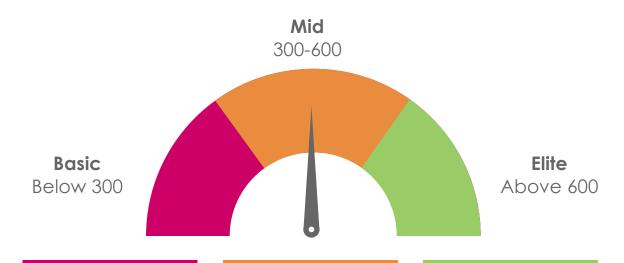
OTHER

- Car Rental
- Railway
- Cruise
- Ground Transportation
- Events and activities
- Payment type
- Ancillary purchase
- Language
- Currency



We use this data to further specify which audiences are best

Travel Value Score (TVS): Like a Credit Score for Travelers



- 2-3 Trips/yr
- \$1K \$5K per yr.
- No Loyalty Status
- Primarily Research on OTAs
- 1-2 Trips/mo
- \$15K \$20K per yr.
- Elite Loyalty Status
- OTAs & Book Direct

- 3+ trips/mo
- \$60K+ per yr.
- 2+ Elite Statuses
- Mostly Book Direct



We try to make it easy...

We do the heavy lifting, you reap fruitful business outcomes!



 Target people that are in-market for travel, yet undecided.



2. Target people that spend more and stay longer, via credit card & intent data.



Target people, not devices.



4. Quantify the impact of your advertising down to the last dollar.



5. Avoid becoming obsolete. Work with the latest and greatest AdTech & cookieless targeting.



6. Avoid confusing stakeholders with KPIs that require explanation.



7. Reports that justify your spending of public funds.

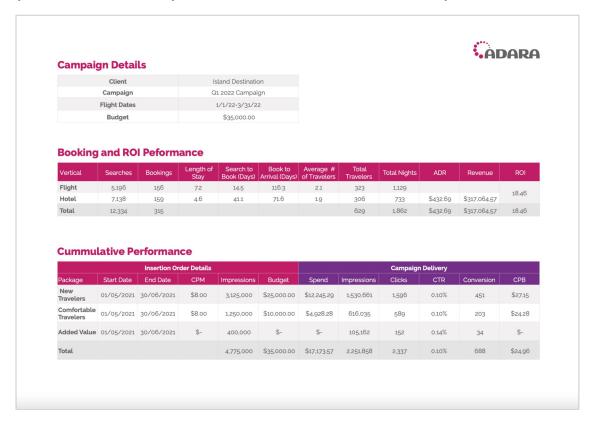


8. Work with your own strategic advisors who optimize campaigns.



Post-Campaign Analysis

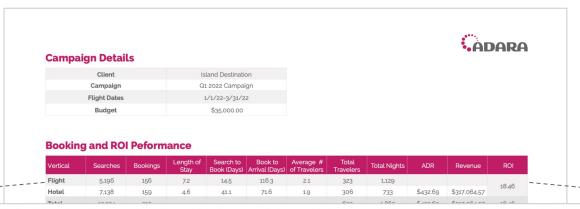
We can tell you how many visitors came who saw your ads...





Post-Campaign Analysis

We can tell you how many visitors came who saw your ads...



Booking and ROI Peformance

Vertical	Searches	Bookings	Length of Stay	Search to Book (Days)	Book to Arrival (Days)	Average # of Travelers	Total Travelers	Total Nights	ADR	Revenue	ROI
Flight	5,196	156	7.2	14.5	116.3	2.1	323	1,129			40.46
Hotel	7,138	159	4.6	41.1	71.6	1.9	306	733	\$432.69	\$317,064.57	18.46
Total	12,334	315					629	1,862	\$432.69	\$317,064.57	18.46



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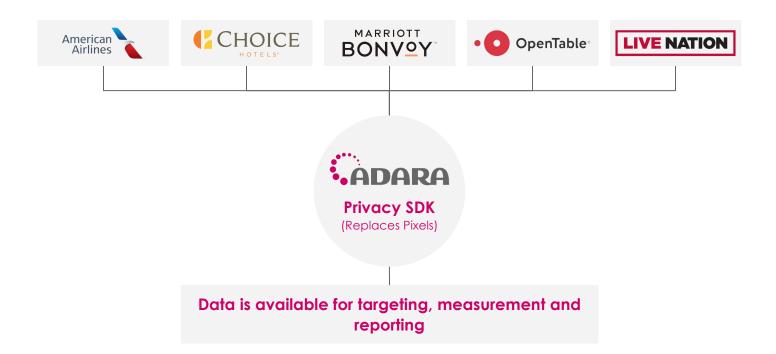
Adara's technology is available for you to leverage for the collection of privacy compliant data. Don't reinvent the wheel...use ours.





Adara's Public Data Consortium

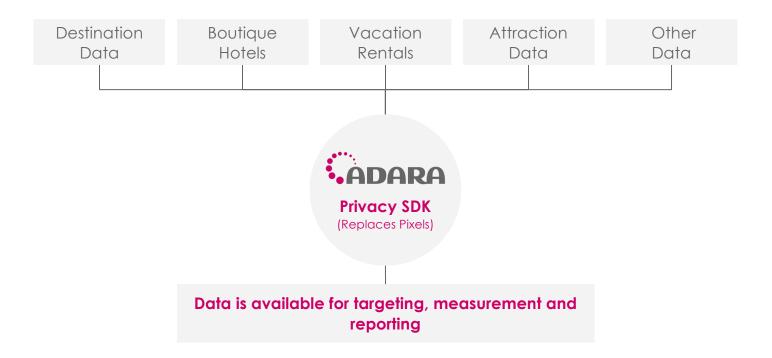
Partners trust our technology...





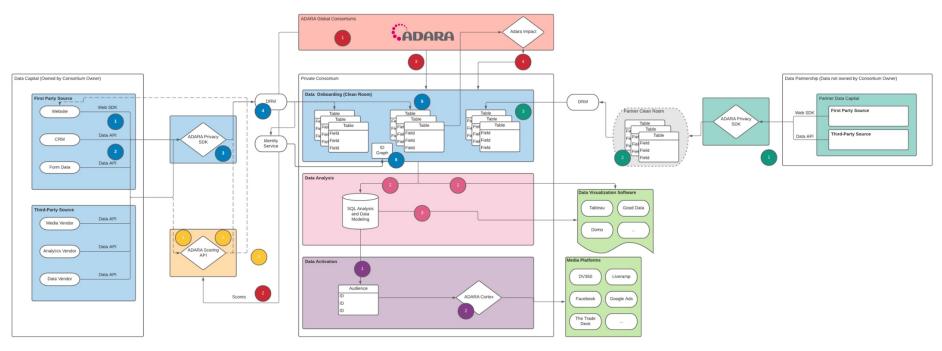
Private Data Consortium: Are you ready for a cookieless world?

The clock is ticking...begin onboarding your data before it's too late...









Consortium Owner Onboarding

- WebSDK An Adara Privacy SDK solution to onboard streamed data from an active domain in a first-party context. Any PII is tokenized. All data is linked to a token.
- Data API An Adara Privacy SDK server-to-server solution to onboard offline data in bulk from an existing data stack/ database in a first-party context. Any PII is tokenized. All data is linked to a token.
- Any and all data onboarded to the clean room is done so through the Adara Privacy SDK. It makes sure that no personally identifiable data is onboarded or utilized
- Data Rights Management is a governance technology that gives the data owner full control over the usage and state of their data at any given time.
- Defined by the customer the data is onboarded to a prearranged taxonomy that fits the use cases.
- As data passed through the Adara privacy SDK, any tokenized data is pased throught identity service to generate and feed in to a dedicated ID Graph that is accessible and facilitates data linking.

Data Scoring

- The Adara Privacy Token allows any onboarded data to be scored against the Adara Scoring API in a privacy compliant manner. The technology uses the ID Graph to map tokens.
- The scores are generated by an algorithm and output the scores together with the client token to allow linking with other data.
- The Adara Scoring API functions in a matter of microseconds and can be used as an input to improve the Customer Experience (CX) of a website visitor in real time.

Adara Enrichment & Measurement

- The Adara Public Consortium is a data pool of 200+ data partners that contribute to building over 1 Billion identities. This data can be tapped into for enrichment purposes.
- The Adara Public Consortium together with a number of machine learning models contribute to the Adara Scoring API.
- The data in the Public Consortium can be used for validation and confirmation use cases by retrieving relevant attributes or indicators.
- Onboarded Media and Site Logs can be used to map ou against the confirmed search and booking events of the travel consortium for the use of attribution measuremen. The Impact UI will host the visuals, while the consortium hosts the raw data.

ata Analysis

- The data in the Clean Room can be directly linked to a data visualization tool of choice. With a robust taxonomy there is little to no data munging required.
- Some use cases for the data may require data querying to tranform the data. This is facilitated by the clean room through SQL querying.
- Analyzed data can we delivered to the same visualization software or any other destination.

Data Activation

- Data from the Clean Room can be used to define and build audiences for media activation.
- Adara Cortex provides the user interface to the newly build audience to allow activation to any of the available integrations.

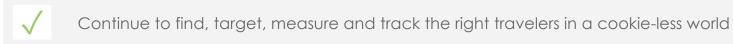
Data Partner Onboarding

- Similar to the Consortium Owner Onboarding process, the Data Partner can use any of the Privacy SDK solutions to
- The Data Partner may chose to onboard data to their own private clean room before selecting what to share with the consortium owner.
- As predefined, the data is fit into the agreed taxonomy for the use cases of the consortium owner and member.



Benefits of a Private Consortium

A Private Consortium will allow an organization to:



- Produce ROI reports in a credible way to stakeholders
- ✓ Access insights you've never had by enriching your data with a much larger consortium
- ✓ Protect your business from privacy-related liability
- ✓ Be the "Adara" of the destination by creating your own "walled garden"
- Gain market share over competitors who haven't put a cookie-less solution in place
- ✓ Future proof yourselves from ongoing changes

Summary

Changes like these are here to stay...owning a solution is no longer optional — it's inevitable and essential.

Onboarding 1st party data is the future of digital marketing.



Want a copy of these slides?

Request them via our contact us form...







Jason Manges Senior Sales Director

Jason.Manges@Adara.com



Let us help you provide

value your stakeholders understand

- High-value travel audiences
- Cross campaign measurement & insights
- Expenditure reports for your Destination



Let's Connect!

Zeek Coleman

Head of Marketing, Tourism & Hospitality Zeek.Coleman@Adara.com



