

Google Introducing The Privacy Sandbox On Android

POV and Guidance

Internally focused although information can be shared with clients.	February 16th, 2022
Global	Version 1.0
Internal Audiences who would benefit from this information: CEOs & local leadership teams Programmatic, data and strategy	Key Contributors Krystal Olivieri (GroupM) Carlos Casal (GroupM) Brian Decicco (Mindshare) Delphine Hernoux (Wavemaker) Oksana Khidko (GroupM) Kieley Taylor (GroupM) Charisse Tabak (Choreograph)

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GOAL OF THIS DOCUMENT

The goal of this document is to provide the organization with key information as it pertains to Google's most [recent announcement around its new proposal to introduce Privacy Sandbox on Android](#).

To see more POVs and client information on this topic, please check out [The Global Innovation GroupM Sharepoint](#) and [Cookieless Future Sharepoint](#).

WHAT HAPPENED?

On February 16th, 2022, the Google Chrome team [announced](#) that they are kicking off a multi-year initiative to build the Privacy Sandbox on Android, with the goal of introducing new, more private advertising solutions. Specifically, these solutions will aim to limit sharing of user data with third parties and operate without cross-app identifiers, including advertising ID. They have also mentioned they are exploring technologies that reduce the potential for covert data collection, including safer ways for apps to integrate with advertising SDKs. However, Google did not state they would deprecate the Android ID (though we expect that to eventually happen).

WHAT DOES THIS MEAN?

The existing Privacy Sandbox initiatives only included the Chrome ecosystem. With this announcement, Google is extending the Privacy Sandbox initiative to include the Android ecosystem. Based on the current outline of proposals, it seems that Google is trying to align areas of focus across Chrome and Android (e.g. Topics for Chrome, Topics for Android), which may help drive a more seamless solution / approach long term.

This announcement furthers our perspective that the industry is moving toward greater privacy and a world where advertisers shouldn't assume they will have access to a customer's digital data (unless they can convince consumers they really deserve it).

WHEN DOES THIS GO INTO EFFECT?

They are starting the multi-year initiative now, and we expect more information in the coming months. There is no immediate impact to marketers as Google has not committed to actually deprecating the Android ID at this time. However, this in conjunction with the Android feature rolled out last June that prompts consumers to determine if they would like to opt-out of tracking is an indication that Google long term will likely look to deprecate the Android ID.

Testing is expected to be available at the end of 2022, so we will continue to work with Google to surface opportunities for brands as they arise.

IS GOOGLE DEPRECATING THE ANDROID ID TODAY?

No. They have not made any definitive statements around Android ID depreciation yet. They are taking a slightly different approach vs how they handled cookie depreciation, focusing first on finding a solution before making a definitive statement on timing.

However we can assume ID deprecation is the end goal. As a reminder, with ATTF, Apple has already begun to enact changes to data privacy and consent mechanisms in their most recent iOS updates, from which we have already started to recognize the impacts of eroding device ID intelligence (e.g., targeting scale, measurement & attribution). Android implemented a similar solution last year, but took an opt-out approach vs an opt-in so with a slightly different impact.

WHY IS GOOGLE DOING THIS NOW?

GroupM has anticipated this announcement for quite some time. With evolving regulation, changes to identifiers via Chrome and across other Mobile operating systems like Apple, it is a natural evolution / expansion of the Privacy Sandbox's focus.

Also, Google has once again reiterated their commitment to seek industry perspectives on the solution and work closely with regulators to ensure compliance.

POTENTIAL IMPLICATIONS / CONSIDERATIONS FOR MARKETERS

As of now, there are no implications for marketers. However, if / when Google does eventually deprecate the Android ID and adopt Privacy Sandbox based solutions, it could impact mobile advertising, from cross-app insights and tracking through to targeting, measurement and analytics. We are not sure how Android will ultimately implement any future changes, but marketers can assume there are learnings from the [ATTF](#) and Android opt-out changes that can provide a benchmark for potential impact.

More importantly, this reinforces our belief that consumer level data not directly given to a brand will become increasingly more difficult to collect.

WHAT IS GROUPM'S PERSPECTIVE?

GroupM remains committed to making advertising better for people and is in favor of privacy preserving solutions that support a healthy advertising ecosystem. We are hopeful that this scope increase won't delay progress on the Chrome side, as approaches for ecosystems seem to be aligned to common focus areas. With that said, we are committed to working closely with our partners at Google to ensure industry and client perspectives are considered as solutions evolve.

WHAT IS GROUPM DOING TO PREPARE?

GroupM has kicked off a global workstream focused on organizational transformation in a future without third-party cookies and other identifiers. Led by Alex Stil (Alex.Stil@groupm.com), this workstream will ensure that we transition seamlessly to new technologies in the coming year, and consists of the below teams:

- **Client Engagement & Value proposition:** We are delivering clear communications and strategies for our clients, ensuring consistent POVs across a range of identity topics, education programs & cookieless readiness audits for clients.

- **Test & Learn Programme:** Cross-functional team of discipline specialists working on a consistent global test & learn programme across audiences, media buying, activation, optimization and measurement
- **Partnerships & Investment:** We are working with partners and 3P providers and the media supply chain, maintaining a global RFIs process and establishing a shortlist of preferred vendors (technology, data and media).
- **Product development:** GroupM and Choreograph are working together to design ground-breaking solutions that will help us navigate the identity challenge. Our first announcement in this space will be our new client identifier dependency transformation platform, named IDx, which will be focused on helping teams assess client risks and create roadmaps for areas for focus.
- **Measurement & Analytics:** These focus groups are exploring and designing future proof solutions for cross & in channel audience, brand and performance measurement and one team is focussing more on the impact and changes needed from an overall Analytics perspective.

HOW DOES THIS IMPACT PRODUCTS WE HAVE TODAY AND ARE DEVELOPING WITHIN CHOREOGRAPH?

GroupM and Choreograph are committed to building solutions that empower our clients, and support and enhance the data and technology decisions they make. We believe in a future of multiple privacy-preserving solutions that help our clients reach their marketing objectives.

Through Choreograph, we are exploring and investing in several areas of product development to address the challenges coming with the depreciation of the third-party cookie and other identifiers, as we believe there will not be one solution to future proof our clients, we are investing and exploring multiple directions of product development, such as:

1. Identity network (probabilistic)
2. Identity Graph (deterministic)
3. Machine Learning Graph
4. Resolve (cohorts)
5. Geo-Graph
6. Contextual / other non-cookie signals
7. Walled Garden activation with 'classic' identifiers (e.g. email)

For more information on Choreograph, please reach out to hello@choreograph.com.

WHAT SHOULD I ADVISE MY CLIENT(S)?

Teams are welcome to use any / all information in this document to educate clients around these changes.

Though there is no immediate action required from this announcement, it gives us increasing clarity around Google's plans and considerations for the future of Android, and more broadly, the reality that user level data collection via digital media is going to become increasingly scarce.

For clients it remains true that there is no one-size-fits-all solution to this challenge and it will require each client to prepare and adopt different sets of solutions. Each client—their data accessibility, product distribution approach, relationship with customers, tech stacks, ethics principles, etc.—is different. Clients and their agency teams should continue to partner together to focus on preparedness in the following ways:

1. Educate all the stakeholders of changes in the industry and the overall potential impact
2. Assess client risks, preparedness levels and develop prioritized roadmap
 - a. As mentioned, later in Q1 GroupM will roll-out software-based capabilities that (1) creates a consistent approach to evaluating client exposure to identifier deprecation risks, (2) diagnoses current preparedness to weather those threats (with benchmarking against peer set), and (3) provides a topline readiness plan to begin to action against with the client. This tool, named IDx, is being developed in partnership with our agency experts by the Global Innovation Group. Please reach out to innovation@groupm.com for more information.
3. Deploy custom action plan bespoke to the client specific needs including:
 - a. Develop, test and embrace strategies that are data / signal diverse and inclusive of more than just personal / customer data (e.g. creative, supply)
 - b. Break down internal organizational silos that may block data accessibility
 - c. Review technology investments to ensure data informs the entire customer experience
 - d. Explore predictive decisioning and predictive analytics approaches
 - e. Test, learn and optimize while the industry adapts and evolves

Clients who have consumer-facing applications should also start to lean into the developer ecosystem to understand the proposals and potential impact as this evolves.

WHAT SHOULD I DO IF I AM CONTACTED BY PRESS?

If you are contacted by a member of the press regarding this announcement and its effect on Google’s Privacy Sandbox, please contact Jared.Baiman@groupm.com.

WHERE CAN I GET MORE INFORMATION?

- [Introducing the Privacy Sandbox on Android](#) - BlogPost
- [Privacy Sandbox on Android](#) - Developers site
- [Updated Privacy Sandbox Website](#) - now with Android added as an additional section

And as always, agencies can stay up to date on the latest developments via GroupM’s [Data Intelligence MS Teams Community](#) and [Global Identity Action Group MS Teams](#).

RECAP: TIMELINE OF GOOGLE’S PRIVACY EVOLUTION

Date	Action
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<i>April 2018</i>	<p>GDPR goes into effect.</p> <p>+</p> <p>Google announces that DoubleClick ID will no longer be available for data transfers on YouTube impressions and those recorded by the DCM ad server and the DoubleClick Bid Manager DSP.</p>
<i>May 2019</i>	<p>Google announces near-term plans to ensure transparency around consumer data collection, and requires companies to classify their cookies using the SameSite standard classifications.</p> <p>+</p> <p>Google Chrome stops sending third-party cookies in cross-site requests unless the cookies are secure and flagged.</p>
<i>October 2019</i>	<p>Google announces that Google's Data Transfer (DT) Services will begin winding down after the UserID and Partner ID redaction is complete.</p>
<i>January 2020</i>	<p>Chrome announces plans to phase out support for third-party cookies within the following two years, once privacy preserving mechanisms have addressed the needs of the web community.</p> <p>! See FAQ Google Chrome and Third-party Cookies for further info</p>
<i>April 2020</i>	<p>Google extends the timeline for global UserID and PartnerID redaction in Data Transfer (DT) for Campaign Manager and Display & Video 360. Global redaction, currently planned for Q3 2020, is postponed until March 31, 2021.</p> <p>! See FAQ Update to DT Deprecation Timelines for further info</p>
<i>January 2021</i>	<p>Google releases an update to Privacy Sandbox, indicating FLoC as "an effective replacement signal for third-party cookies."</p> <p>! See FLoC POV and Guidance for further info</p>
<i>March 2021</i>	<p>Google announces that once third-party cookies are phased out, they will not build alternate identifiers to track individuals as they browse across the web, nor will such identifiers be used in their products.</p> <p>! See Google's Identity Evolution POV and Guidance on DV360 and Google Ads Changes for further info</p>
<i>June 2021</i>	<p>Chrome shared an updated timeline – Based on feedback to date, Chrome is estimating that the privacy preserving technologies will be deployed by late-2022. This means they will be ready for adoption by the developer community.</p> <p>! See Google 3PD and Privacy Sandbox Update POV and Guidance for further info</p>

August 2021	<p>Google announced limited testing of FLoC powered Interest Based Advertising solution.</p> <p>! See Google DV360 Simulated Interest Based Advertising Test Guidance Document for further info</p>
January 2022	<p>Google announces a new Privacy Sandbox proposal called Topics API to replace third-party cookies and the previously announced FLoC solution.</p> <p>! See Google's New Cookie Replacement: Topics API POV for further info</p>
February 2022	<p>Google announces a multi-year initiative to introduce the Privacy Sandbox on Android.</p> <p>! See Google's Blog Post for further info</p>