

# NAVIGATING CHANGE

MARKET CONSOLIDATION & THE  
EVOLVING IDENTITY LANDSCAPE



*The way Canadian brands connect with their audiences is fundamentally changing. As privacy regulations tighten and traditional tracking fades, marketing and data leaders face a new reality: yesterday's data strategies can no longer support tomorrow's growth.*

*Today, success depends on data collaboration - specifically, how securely and effectively brands can share and match their first-party data.*

*Driven by tightening regulations like PIPEDA and Quebec's Law 25, the rise of retail media, and shifts in the ad tech ecosystem (including major moves like Publicis's acquisition of LiveRamp), the Canadian landscape has reached a turning point. Whether you are navigating cookieless identity solutions or assessing new platform integrations, this guide answers the most pressing questions for Canadian marketing and data leaders looking to secure a competitive advantage.*



## WHY ARE HOLDING COMPANIES CONSOLIDATING IDENTITY TECHNOLOGY?

The digital advertising industry is undergoing a structural shift, driven by ongoing signal loss and the rapid introduction of global privacy regulations. In this new era, the underlying "identity spine" of the internet, which is the technology used to recognize consumers and target ads, has become the most valuable real estate in the ecosystem.

This has triggered a wave of market consolidation, highlighted most recently by major holding companies tightening their grip on identity technology.

A prime example is Publicis' continued investments and acquisition of LiveRamp (alongside their ownership of Epsilon). The strategic goal for these holding companies is clear: they are building their own "walled gardens." By owning or exclusively integrating the data, the identity resolution, and the media buying under one roof, they aim to offer clients an end-to-end, closed-loop system.

## WHAT EXACTLY IS LIVERAMP?

### **/LiveRamp**

To understand the impact of these industry moves, it is helpful to understand the technology at the centre of it.

LiveRamp operates as a centralized identity graph. In simple terms, it is the industry's legacy "universal translator." A brand possesses fragmented consumer data (emails, phone numbers, device IDs), and LiveRamp stitches that information together into an anonymized, unified profile (known as a RampID). This allows the brand to match its customer lists with publisher audiences across the open web to serve targeted advertising.

Historically, this architecture relies on a principle of data movement. To utilize a centralized graph, a brand must upload and transfer its valuable first-party data into the vendor's ecosystem to facilitate the match.

## WHAT DOES THIS MEAN FOR ADVERTISERS?

As holding companies consolidate these identity capabilities, marketing leaders must weigh several strategic factors:

- **Operational Convenience:** A holding company's integrated identity infrastructure streamlines campaign activation and measurement. The core consideration is structural: when a single entity controls execution, identity resolution, and measurement, independent verification becomes non-default and external measurement access may be limited. As integration deepens, the cost of transitioning increases, making early contractual access to neutral third-party measurement and external validation essential.
- **Platform Portability:** When an agency controls centralized identity graph and clean room infrastructure, advertisers face intelligence retention risk at two levels: what audience models, insights, and learnings remain with the incumbent post-departure and whether these can benefit competing clients; and how first-party data contributed to a shared identity graph persists beyond the client relationship, potentially informing outcomes for other participants within the same infrastructure. Contractual and data governance terms at both levels warrant scrutiny before committing to a deeply integrated ecosystem.
- **Data Control and Security:** Because first-party data is a brand's most critical asset, advertisers must assess their comfort level with moving this data into third-party, centralized graphs, balancing the need for audience match rates with their own internal security and data governance policies.



## HOW DOES THIS IMPACT THE CANADIAN MARKET?

While the push for centralized, global identity graphs makes sense on a macro scale, it requires a nuanced approach when applied to the Canadian market.

First, Canada operates under distinct and evolving regulatory frameworks (such as Quebec's Law 25 and updates to PIPEDA), which require strict consent and data-handling protocols that do not always align perfectly with platforms built primarily for US scale.

Second, the Canadian publisher and retail media ecosystem is highly concentrated. A globally centralized ID graph can sometimes be inefficient in Canada, where agile, localized, direct-connection technologies often yield better match rates and navigate local publisher relationships more effectively.

## WHAT ARE THE ALTERNATIVES TO CENTRALIZED IDENTITY GRAPHS?

Because of concerns around data movement and vendor lock-in, the industry is seeing a secondary shift. While some players double down on centralized graphs (the holding company model), a growing portion of the market is moving toward decentralized collaboration via Data Clean Rooms.

Advertisers are seeking ways to collaborate with premium publishers and Retail Media Networks (RMNs) without having to move, share, or centralize their raw data. This shift prioritizes brand independence, ensuring the advertiser retains total ownership of their data infrastructure, regardless of which agency executes the media buy.



# PLATFORM SPOTLIGHT

## UNDERSTANDING INFOSUM

As we evaluate privacy-first data collaboration for our clients, we utilize InfoSum as a primary solution. Below is a brief overview of how this technology fits into the broader landscape.

### WHAT IS INFOSUM?

InfoSum is a decentralized data clean room. It is a technology that allows brands, publishers, and retailers to securely match audiences and collaborate on data strategy without ever sharing or exposing the underlying raw data.

### HOW DOES ITS UNDERLYING TECHNOLOGY DIFFER FROM LEGACY ID GRAPHS LIKE LIVERAMP?

The fundamental difference is the "non-movement of data." Instead of a brand uploading its customer lists to a central vendor to be translated and matched (the legacy model), InfoSum allows the data to remain securely in the brand's own servers. The platform simply brings the mathematical matching process to the data.

### WHY DO WE UTILIZE AND RECOMMEND THIS APPROACH FOR CLIENTS?

We believe in maximizing advertiser control. The decentralized approach eliminates the privacy risks associated with moving data, prevents agency or vendor lock-in, and ensures the brand retains 100% ownership and control of its first-party data while still achieving high-performing media matches.

### GIVEN INFOSUM IS WITHIN WPP, HOW DOES THIS AVOID THE SAME "WALLED GARDEN" OR LOCK-IN RISKS?

The critical difference lies in the infrastructure itself. Unlike centralized graphs where data is pooled and potentially accessible by a parent company or agency, InfoSum's privacy protections are uniquely built directly into the orchestration of the platform. Because it operates on a strict non-movement of data principle, no one beyond the independent data owner can see or access the data. It simply isn't technically possible. Not InfoSum, not WPP, and not the agency. The advertiser maintains absolute, independent control and isolation of their data at all times.