

The Global Marketer's Guide to Identity

Move beyond rigid identity models
and embrace strategies that help
deliver greater audience reach across
markets and channels.



Table of contents

Introduction	3
Defining graph coverage	4
State of identity	5
Regional considerations	6
How to take a global approach to identity	7
The opportunity for global marketers	8

Introduction

Success in marketing demands more than data collection — it requires strategic activation across all consumer touchpoints. While companies once relied on universal IDs and device graphs, a comprehensive global identity strategy has become the true differentiator between market leaders and followers.

A global identity approach is essential because it accounts for regional nuances, digital advertising maturity, socioeconomics, and cultural dynamics — factors influencing how identity strategies perform. **As pressure mounts to make every marketing dollar count, the most successful global brands recognize that an identity strategy isn't a technical checkbox.** It's the foundation upon which all effective marketing is built. A global identity plan enables precision at scale, transforming disconnected data into coordinated experiences that drive measurable business outcomes across diverse markets and channels.

The Trade Desk's identity solutions can help advertisers move beyond rigid identity models, enabling them to connect identifiers, devices, people, and households in ways that align with real-world consumer behavior.

This guide will walk you through key factors in assessing and understanding graph coverage, explore the current state of identity across select regions, and provide actionable insights for adopting a more dynamic, globally adaptable approach to identity. →



What is graph coverage?

Graph coverage refers to the scope, accuracy, and ability to connect the identifiers representing a person at a given programmatic auction to the full range of devices a person uses across their digital life. This determines how well advertisers can reach their intended audiences across devices and environments while effectively scaling the use of first-party data.

Three key factors influence effective graph coverage:

1. The number of devices a person has

In markets like the U.S., a middle-class household can contain over a dozen phones, tablets, connected TVs (CTVs), and other connected devices. However, in India, a household of similar socio-economic standing has only a few devices that may connect to the internet. This disparity in device proliferation directly impacts graph coverage.

2. Internet connectivity

A region's level of internet access directly affects identity reach. While global internet penetration is increasing, significant gaps remain between advanced and developing economies.

The way people connect to the internet varies. Today, 96% of the world's internet users primarily get online through a mobile device,¹ often making it their first and main point of access.

3. Advertising market maturity

A combination of how widely devices are used, how digital ad space is bought and sold, and how online advertising has evolved determines a market's digital ad maturity.

Different regions have distinct advertising behaviors, shaped not just by how long digital advertising and automated buying have been around but also by how people prefer to shop and engage with ads. For example, in Latin America and Southeast Asia, mobile-first retail aggregators with delivery services like foodpanda have become a dominant shopping experience, often replacing traditional in-person retail. As shopping habits shift, brands must rethink how they connect with consumers across different screens and platforms.

1. DataReportal, February 2025.



The state of identity by select region

Advertising in an emerging ad market and having the ability to build an audience with cross-device capacity can put global advertisers ahead of the competition.

In many regions, owning multiple devices can indicate higher income levels, helping advertisers identify and engage with wealthier consumers more effectively. The inclusion of these devices in the graph is a proxy for that affluence.

In North America, graph coverage is highly robust. However, understanding what's possible in different countries and what graph coverage reveals about consumers in each market is key for effective planning.

Marketers can help adjust their expectations by understanding key factors:

SOCIOECONOMICS

Different income levels and spending behaviors can influence digital adoption and ad engagement.

CULTURAL NORMS

How people interact with digital advertising varies widely, affecting campaign performance.

DIGITAL MARKET MATURITY

Digital identity frameworks vary by region, which affects how well cross-device strategies work. Other key factors include regulatory nuances such as the General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA) and their impact on identity resolution, the average number of devices per person, infrastructure limitations (such as e-commerce and delivery constraints), and the specific goals and outcomes that shape how digital advertising operates in each market.

Regional considerations for identity strategies

[Download this table](#)

KEY FACTORS	NORTH AMERICA	EUROPE	NORTH ASIA	SOUTH ASIA	AUSTRALIA AND NEW ZEALAND
Digital market maturity	Mature	Mid maturity	Mid maturity	Maturing rapidly	Mature
Devices per household ²	13.4	9.4 (Western) 4 (Central, Eastern)	3.1	3.1 1 (India)	8
Primary connection type ³	5G	5G	4G	4G	5G
% of population connected to the internet ⁴	93%	92%	78%	53%	96% ⁵
Median ⁶	38	45	40	27	37
GDP per capita in key regional markets ⁷	\$86,601 (U.S.) \$53,583 (CA) \$13,972 (MX)	\$69,237 (DK) \$24,342 (GR) \$52,423 (U.K.) \$20,089 (RO) \$48,021 (FR)	36,322 (SK) \$32,895 (JP) \$12,969 (CH)	\$89,370 (SG) \$4,649 (VN) \$13,142 (ML) \$2,698 (IN)	\$65,966 (AU) \$47,072 (NZ)
Regional regulations	The U.S. relies on a mix of state privacy laws and federal sectoral laws, with industry self-regulatory frameworks like the Digital Advertising Alliance (DAA) and the Network Advertising Initiative (NAI) also providing guidelines. Canada's framework is led by the Personal Information Protection and Electronic Documents Act (PIPEDA) and provincial laws in Québec, British Columbia, and Alberta. Mexico has a federal privacy law in force.	GDPR and other E.U. norms such as the e-privacy directive govern privacy at the E.U. level, with individual countries also having implemented various tailored implementations and specific sectoral laws. Similarly, the U.K. has implemented a package of privacy laws, including the U.K. General Data Protection Regulation and the Privacy and Electronic Communications Regulations (PECR).	A number of North Asian countries have implemented comprehensive privacy laws.	Privacy regulation is still in its early stages, with regulatory frameworks continuing to develop.	Both Australia and New Zealand have announced efforts toward updating their respective privacy laws.
What it means	Graph coverage should be robust and the number of devices per person in the household audience will likely be more than 5.	Graph coverage may have some variance across smaller and less mature markets in eastern and central Europe. However, the real challenge is regulatory limitations.	Rapidly shifting population both in terms of age, urbanization, and wealth.	Connection speed and low GDP per capita across large swaths of the region could make things like e-commerce harder in some areas, so measuring place attribution, etc., will be key proxies for success in some markets.	ANZ looks most like the U.S. of any other market and has the highest translatability from U.S. tactics.
Why it matters	U.S. graph coverage represents an outlier at the high end. This region has the highest number of devices per household and enjoys the greatest coverage.	Europe's regulation and regional variance makes approaching on a country-by-country basis key.	When investing here, understand the rapid maturation of the market, so what is true today may not be true tomorrow. Remain flexible.	This is an area of growth potential. Investing in branding early could help build loyalty as household income and the market matures.	ANZ high graph coverage could similarly be viewed as a global outlier like the U.S.

2. Cisco Systems, Cisco Annual Internet Report, global, 2020. 3. GSMA Intelligence, The Mobile Economy Asia Pacific Report, 2023. 4. International Telecommunication Union, May 2024. 5. DataReportal, Feb. 2024. 6. CIA World Factbook, 2024. 7. International Monetary Fund, 2024; United Nations, 2024; World Bank, 2024; World Economic Outlook Database, 2024.

How to take a global approach to identity

At The Trade Desk, we're building identity graphs that are unique as the populations they represent. Pairing our tools with an understanding of the business outcomes you're trying to achieve can help craft a successful identity graph strategy.

STEP 1

Set clear goals

- Understand if purchase decisions are being made at the household or individual level.
- Focus on the granularity of reporting necessary:
 - If you are focused on overall maximum audience reach, you can select a household graph.
 - If you are focused on reaching specific people within a household, you can use a person graph.
- Household graphs may increase the number of persons in an audience because the household is targeted.
- A person graph (also known as an individual graph) will limit reach specifically to users who are included in an audience.

STEP 2

Understand the market

- As mentioned in the table above, you can evaluate essential metrics such as:
 - Average number of devices per person in each country or region
 - Percentage of the population with regular internet access
 - Primary methods of accessing the internet (mobile vs. broadband)
- Determine who your audience is by assessing both the percentage of the population your identity graph can cover and whether your campaign can effectively scale. If reaching everyone isn't the goal, the key is ensuring you can connect with the right people.

STEP 3

Use identity graphs to unlock value

- Regardless of how many devices a person has, identity graphs can help locate value in the bidstream.
- Even on one device, there are multiple IDs that need to be pieced together to understand the person.
- The more impressions that are accessible, the greater the opportunity to identify and engage with audiences.
- Device proliferation often correlates with GDP. Countries with lower GDP typically have fewer devices per household, making durable identifiers even more critical.
- Identity graphs help connect users across environments and can link mobile browser cookies, UID2s, and streaming services for a more holistic view of user engagement.

STEP 4

Start with durable IDs

- Brands should prioritize durable identifiers and build relationships in high-quality, authenticated environments.
- Durability varies across different identifiers. The average lifespan of a cookie is about 30 days; meanwhile, a mobile advertising ID (MAID) lasts 7 to 10 months, while the lifespan of an email is 7 to 10 years.
- Durable IDs provide a more stable foundation for identity in markets where single-device usage is dominant and can help marketers reach the right users with greater accuracy.



The opportunity for marketers

The ad world has been moving beyond cookies for years, driven by the rise of new digital identifiers that work across channels and the growth of CTV, BVOD, OTT, and streaming audio, which typically does not rely on cookies. In this new landscape, marketers today have the opportunity to:

- Take control of their advertising future by developing cross-channel, omnichannel identity strategies.
- Use a mix of alternative IDs like UID2, ID5, and RampID, which works across CTV, OTT, BVOD, and audio.
- Test multiple ID solutions while maintaining a clear goal beyond just scale, ensuring the approach fits the unique geographic region and advertising channel.

Nearly 80% of ad opportunities seen by The Trade Desk already contain multiple identifiers, highlighting the growing number of IDs present in the bidstream.⁸ This reinforces the need for a robust identity graph to interpret, connect, and navigate these data points effectively.

Working with identity partners and optimizing graph coverage helps marketers build stronger identity frameworks that can scale globally. Strengthening identity strategies can also mean upgrading the types of data used to help enhance accuracy and reach.

Find more resources to help influence your identity strategy at [TheResourceDesk.com](https://www.TradeDesk.com).

 **theTradeDesk[®]**

TheResourceDesk.com