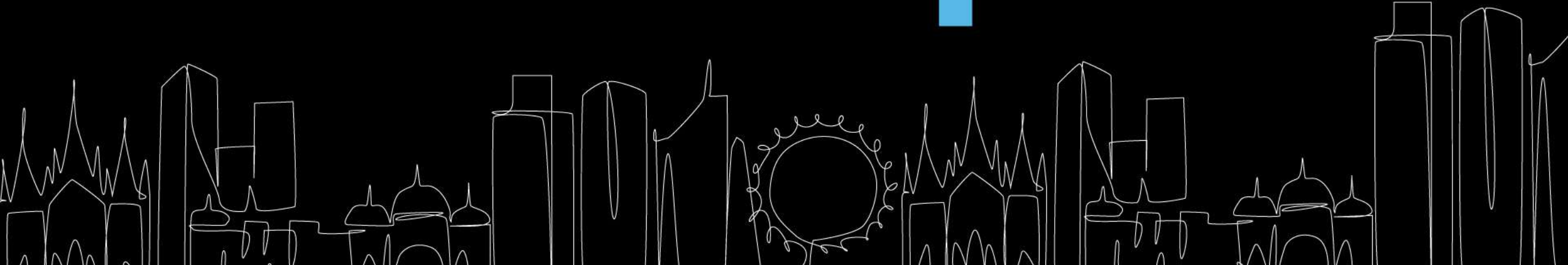


2022

# digital adops

iab.  
australia



# data, privacy & ai:

keynote from iab australia  
on key topics & trends

**iab.**  
australia



**Sarah waladan**

director of policy & reg affairs  
**iab australia**



**jonas jaanimagi**

technology lead  
**iab australia**



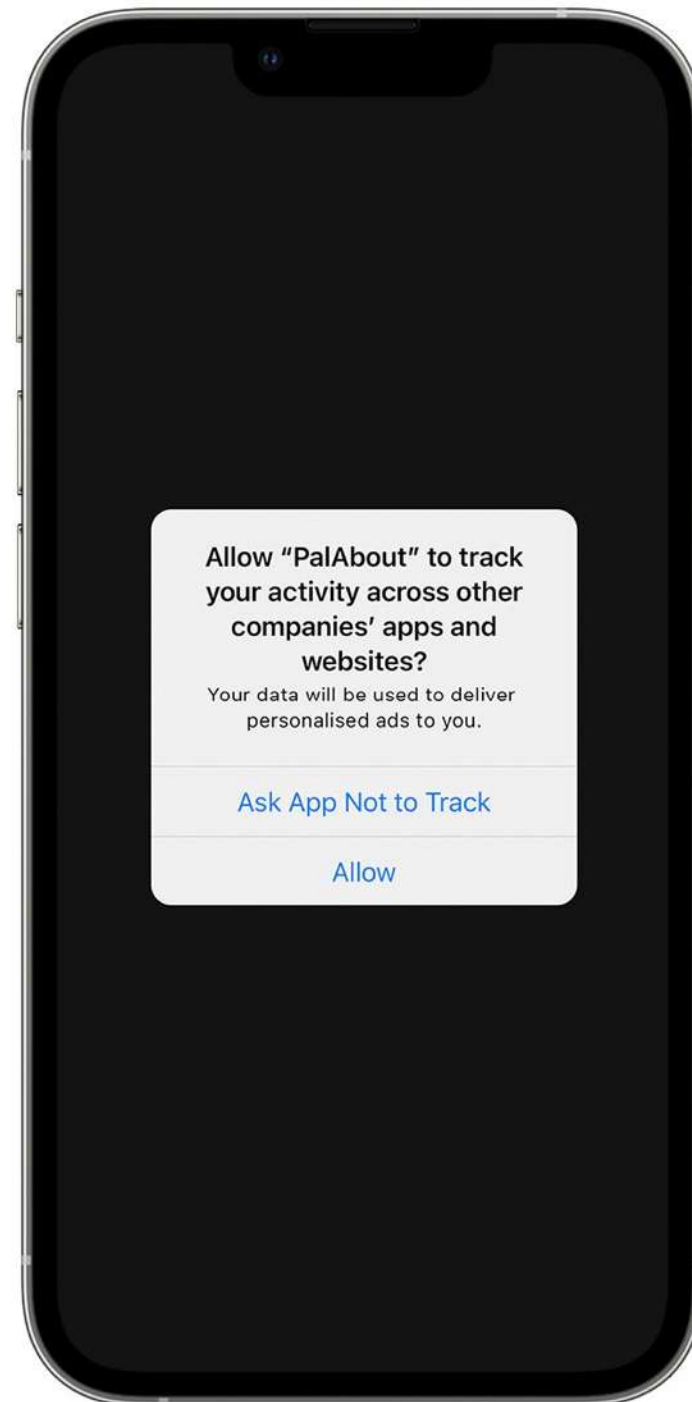
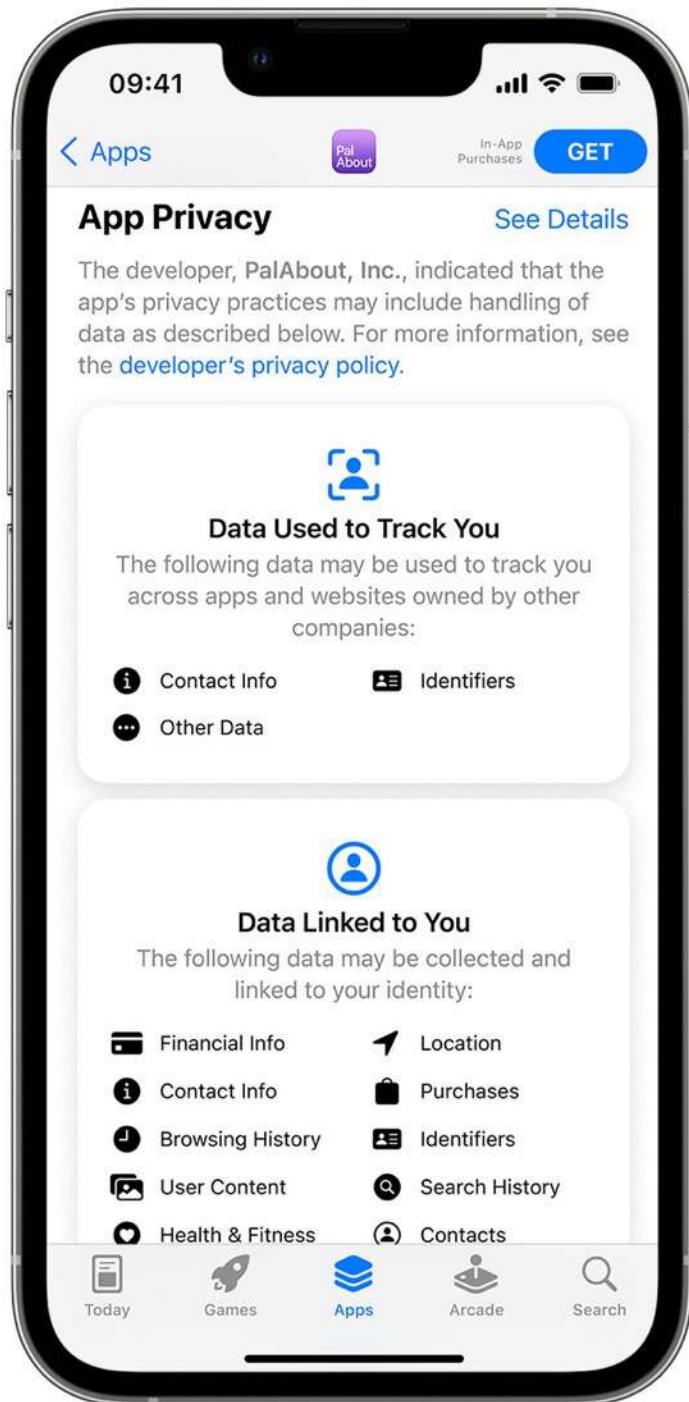
# Vision

A system of standardized technology, protocols, and operations that enable a seamless, robust, and measurable experience for providing video content and addressable advertising to consumers on any screen, in any format, and across all television environments.

The TV advertising delivery, distribution and measurement landscape is fragmented owing to complex ad break management, multiple TV environment and distribution services, and the variance in technologies used across these systems to achieve similar outcomes. Interoperability for addressable ad delivery in linear TV and digital video is possible if we standardize and develop existing technology.

**Our roadmap for Advanced TV is informed by the following objectives:**

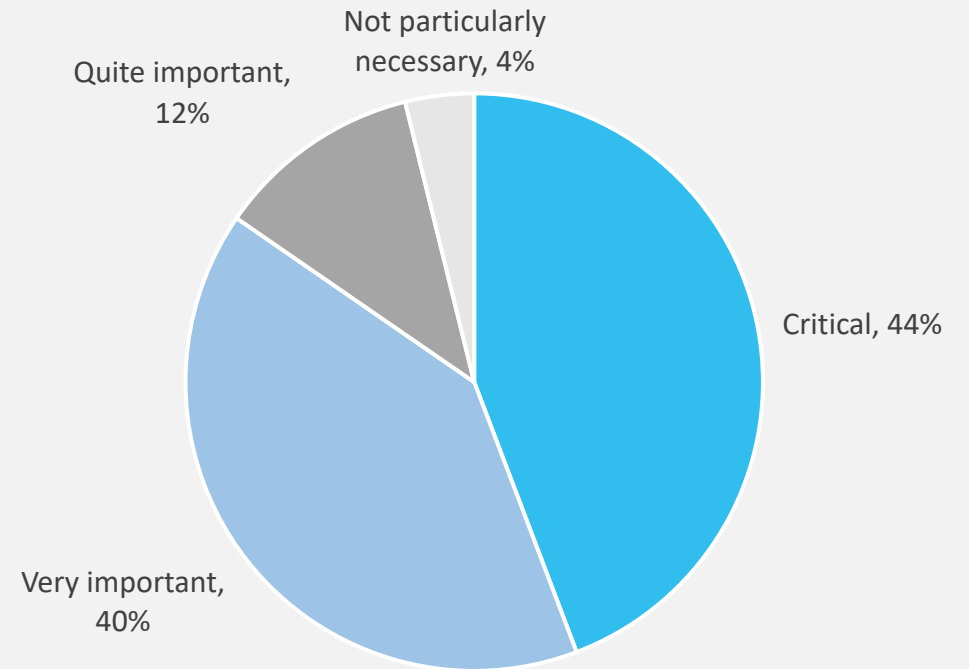
- Interoperability for Frame Accurate Ad Delivery and Ad Break Management
- Universal Addressability and Reconciliation for Audience Measurement
- Full Auditability for Advertising Campaigns delivery
- Ad Measurement for delivery and Viewability verification
- Omni channel sales management for Programmatic buying and selling of Upfronts as well as spot buys





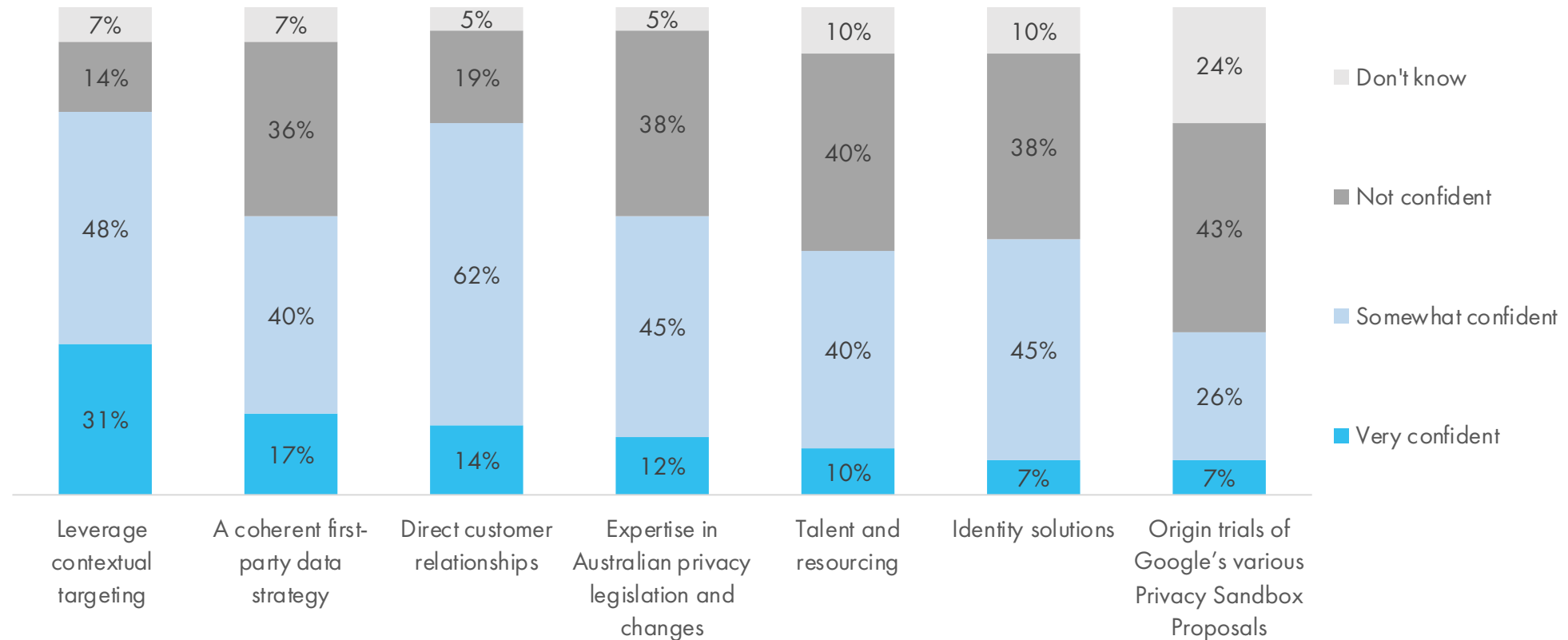
# Importance of data

**84% of respondents say data is critical or very important to the success of digital advertising and driving business growth.**



Importance of data to the success of digital advertising

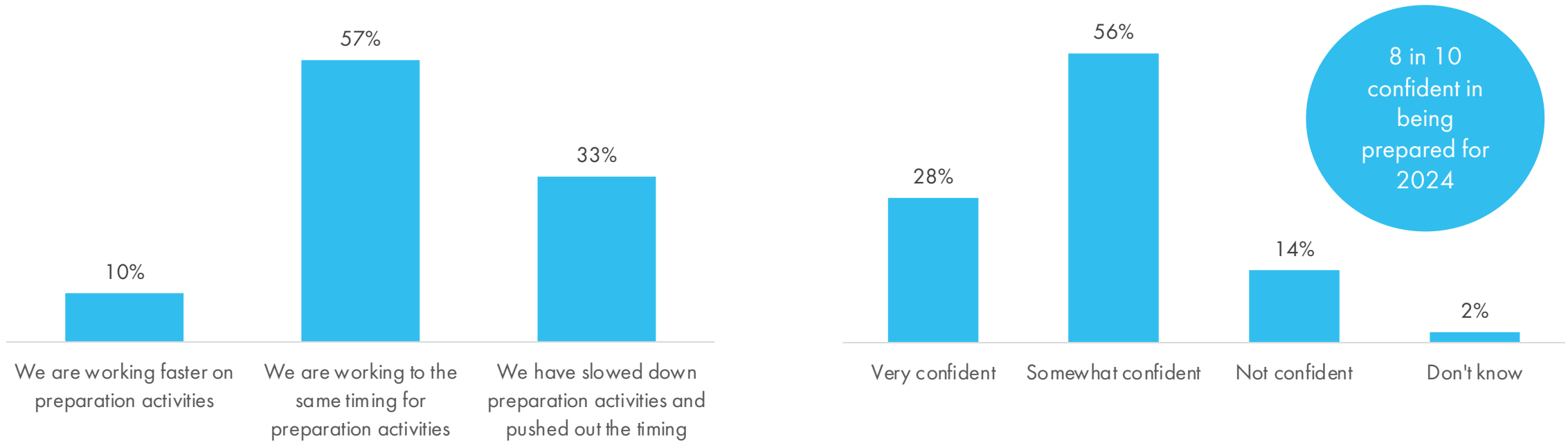
# Confidence in capabilities to tackle data-related opportunities and challenges



Source; IAB Australia Data State of the Nation Survey November 2022 n=100 advertising decision makers/influencers  
 Q - How confident are you that you or your clients have the following business capabilities in place to tackle data-related opportunities and challenges over the next year? (Please select one per row)

# Preparation for retirement of third-party cookies

Right now, 75% of respondents feel prepared and 25% under-prepared.



Impact of Google's postponement of third-party cookie retirement

Confidence in being prepared to target audiences at scale without 3rd party cookies in 2024



[TOOLS PORTAL](#) [STANDARDS](#) [SOFTWARE](#) [COMPLIANCE PROGRAMS](#) [WORKING GROUPS](#) [MEMBERSHIP](#) [EVENTS](#) [BLOG](#)



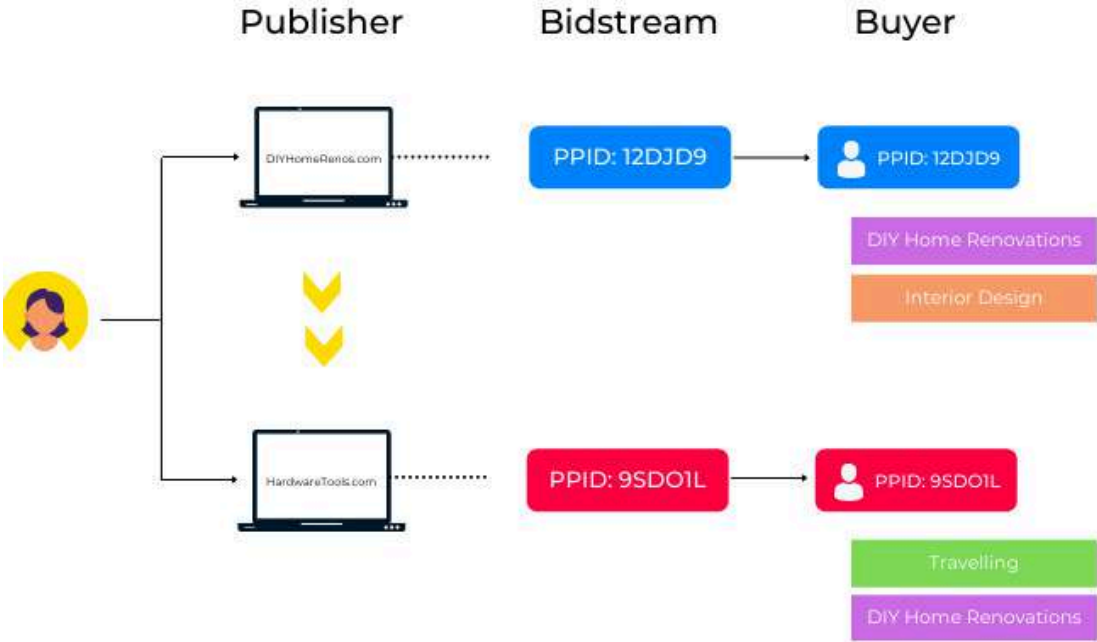
**iab.**TECH LAB

## IAB Tech Lab Finalizes Seller Defined Audiences Addressability Specification

Incubated within Project Rearch, Seller Defined Audiences is the industry's only addressability system designed exclusively designed to empower individual publishers to develop and scale their first party data

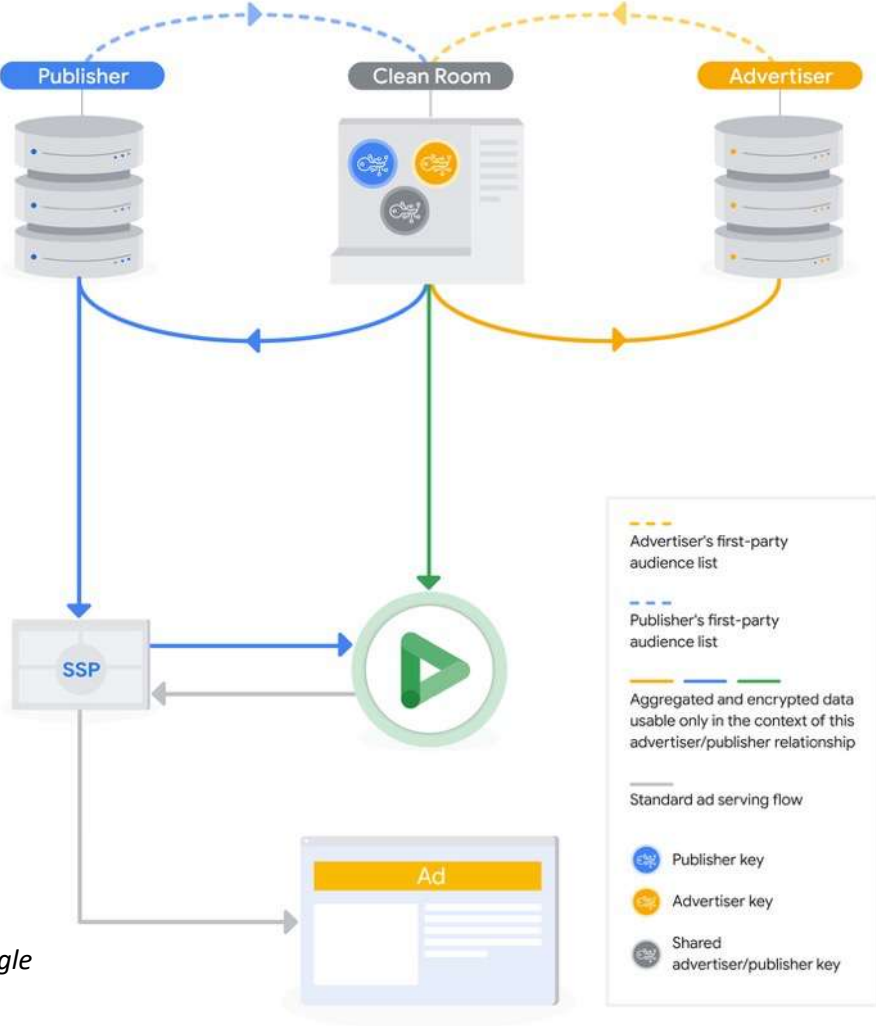


# IAB Tech Lab's SDAs & Google's PPID

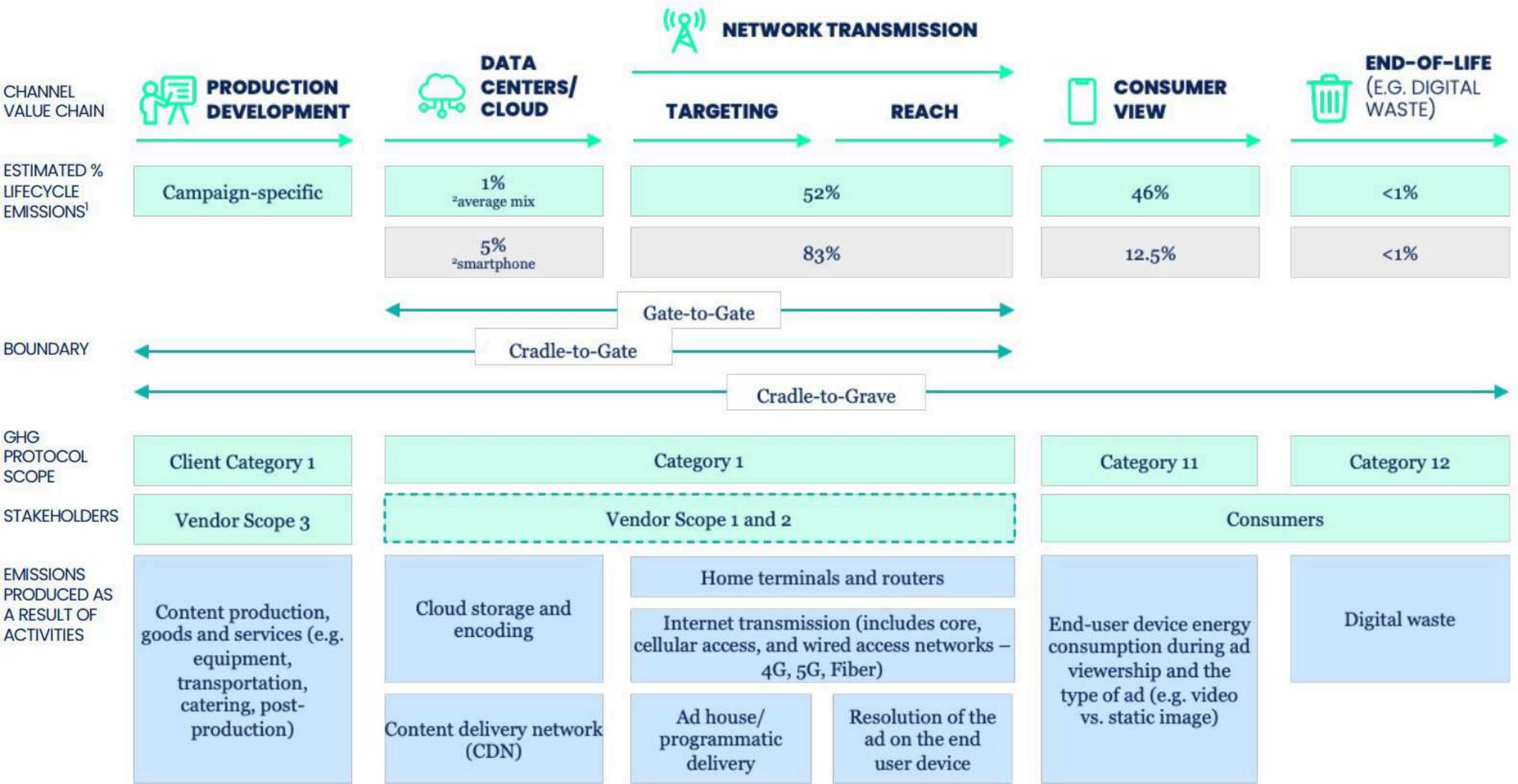


source: Blockthrough

# Publisher Advertiser Identity Reconciliation (PAIR) Workflow



source: Google



source: GroupM

**70%**

The personal data I share online (such as my shopping habits, my email address, etc.) belongs to me, and companies need my permission to use it

**17%**

The personal data I share online (such as my shopping habits, my email address, etc.) no longer belongs to me once I've shared it, and companies can use it without asking my permission

**13%**

Don't know/No opinion

# GAP (Global Accountability Platform)

## Planning and Architecture

**Unlinked 1st-Party**  
Advertiser/Publisher



Seller Definition

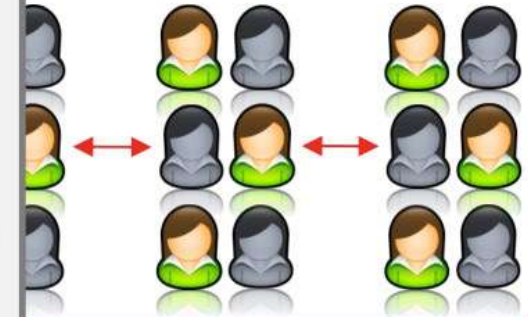
**Status:** Q1 launch

### Description:

- Open, auditable data structures for all participants
- Transaction-level reporting with data use details and accompanying privacy signal
- Pairwise architecture facilitates comparison between data "senders" and "receivers"
- Random sample methodology to thwart manipulation
- Standard technical interface for participants to submit transactions for the period
- Intention to support existing privacy and data protection compliance and enforcement

## Activities & use cases:

**Linked 1:1 Audiences**  
Advertiser/Publisher data connected



ID2 Open-Source Project

Practices for User Enabled ID

id sources.json

Global Privacy Platform

Accountability Platform



# GPP (Global Privacy Platform)

## Planning and

**Status:** Q4-Q1 launch

**Description:**

- Building on track record of encoded signals passed inter-operably through the digital advertising supply chain
- Technical schema and tools, not a one-size-fits-all user interface
- Multi-jurisdictional at once allowing more conservative approaches throughout the supply chain
- Flexibility to support new markets or evolutions in existing ones without disruptions to other markets
- Optional single source of truth for company registry and data uses taxonomy

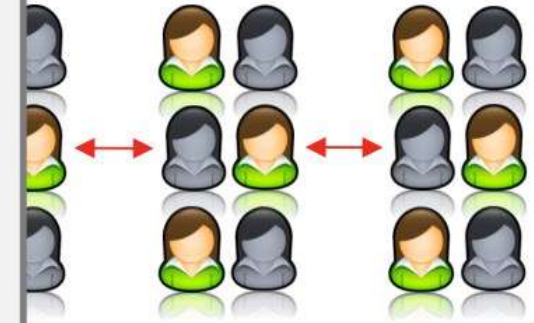
## Activities & use cases:

**Unlinked 1<sup>st</sup>-Party**  
Advertiser/Publisher



Seller Defined

**Linked 1:1 Audiences**  
Advertiser/Publisher data connected



ID2 Open-Source Project

Best Practices for User Enabled ID

id-sources.json

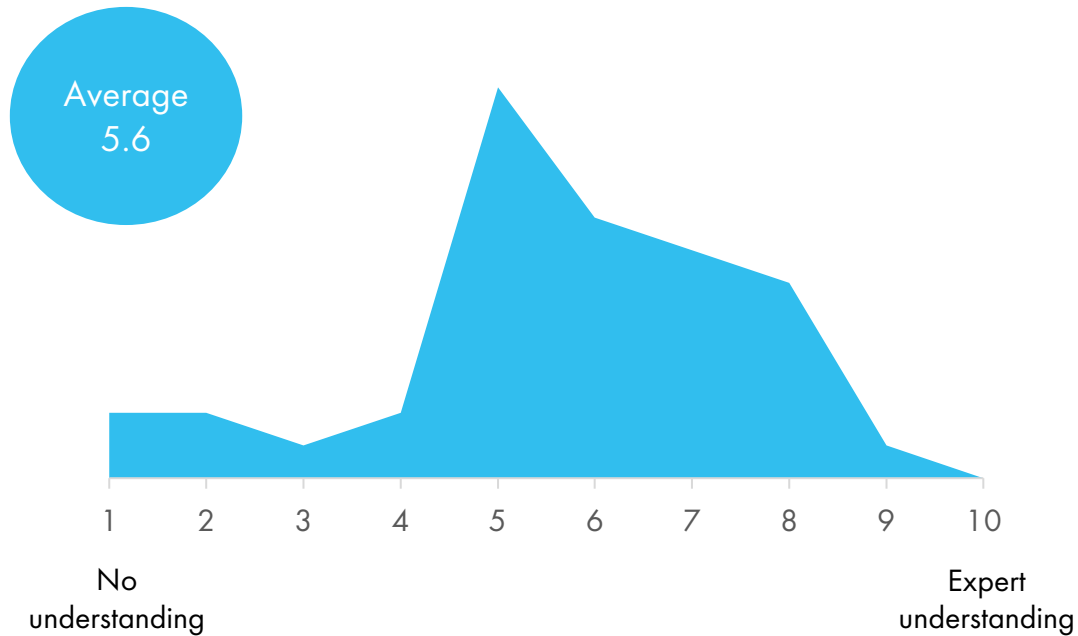
Global Privacy Platform

Accountability Platform

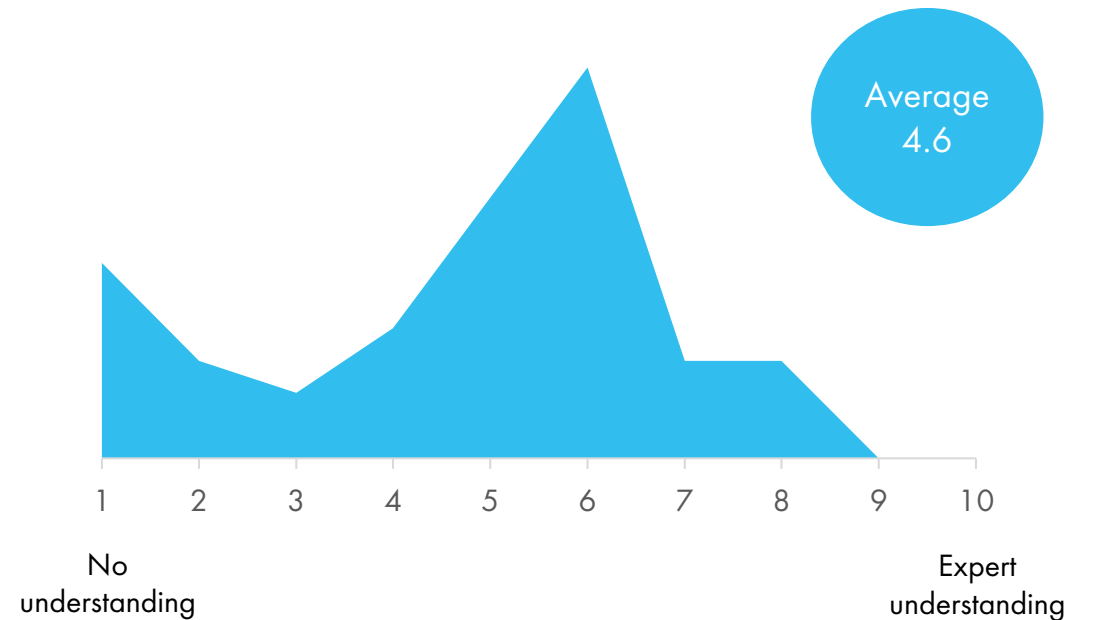


# Understanding of data privacy

Understanding of current Australian privacy laws



Understanding of impending Online Privacy Code and Privacy Act Review in Australia

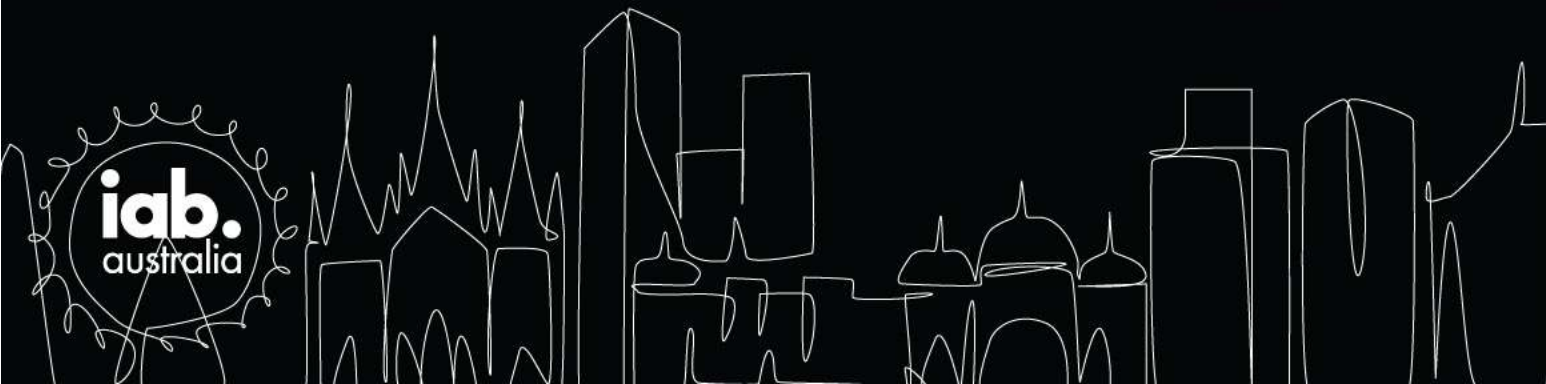


**data, privacy & ai:**  
keynote from iab australia  
on key topics & trends

digital  
adops



**Sarah waladan**  
director of policy & reg affairs  
iab australia



# key issues

- ad tech
- privacy
- advertising restrictions eg gambling, fast food etc
- online platform regulation & harmonisation of regulations

# acc's ad tech services inquiry.

- Is competition in Ad Tech Services effective? ACCC's final report published in September last year found not.

"The existing regulatory framework is insufficient to ensure effective competition in ad tech services"

## **recommendations for industry to address:**

- industry should establish standards to require Ad Tech providers to publish average fees and take rates for ad tech services, and to enable full, independent verification of demand side platform services;
- if effective voluntary standards are not achieved by industry within a reasonable time period that the ACCC could introduce measures instead.

# acc' s ad tech services inquiry.

## next steps & timing

- ACCC published further report on 11<sup>th</sup> November 2022 reiterating the expectation that industry lead the development of an effective voluntary standard
- Government response?
- IAB work so far



# privacy reform.

## review is now underway

- discussion paper process 2021
- currently awaiting Government's report & draft legislation
- balancing stronger privacy protections while supporting a rapidly developing digital economy
- recent security issues

# privacy reform.

- **key issues include:**
  - Scope of information organisations hold & how long they hold that information
  - The scope of information to be regulated & the definition of personal information
  - Fair and reasonable requirement to reduce the burden of consent on consumers
  - Pro-privacy default settings
- **timings and next steps**

# other issues.

- **advertising restrictions e.g:**
  - gambling
  - fast foods
  - sugar etc
- **online platform regulation & harmonisation of regulations**
- **advertising review**

# key takeaways.

- **development of voluntary Industry Code**
  - transparency of pricing for ad tech services,
  - verification of dsps
- **privacy reform is on the way**, but likely a 12 month – 2 year process
- **iab is working closely** with government to ensure the reforms are practically workable
- welcome any **feedback** or **questions**

# navigating trust & transparency in ctv

**iab.**  
australia

**imran masood**

anz country manager  
**doubleverify**



**vikki pearce**

head of digital  
**zenith**

**zane goold**

associate director of  
business development  
**the trade desk**





# Agenda

1

What's The Law?

2

Why Care?

3

What Is Fraud?

4

Fraud In CTV.... It Can't Be So!



In Other Industries, Fraud is Not Only Unacceptable, It's Unlawful.

Financial Fraud is Illegal!

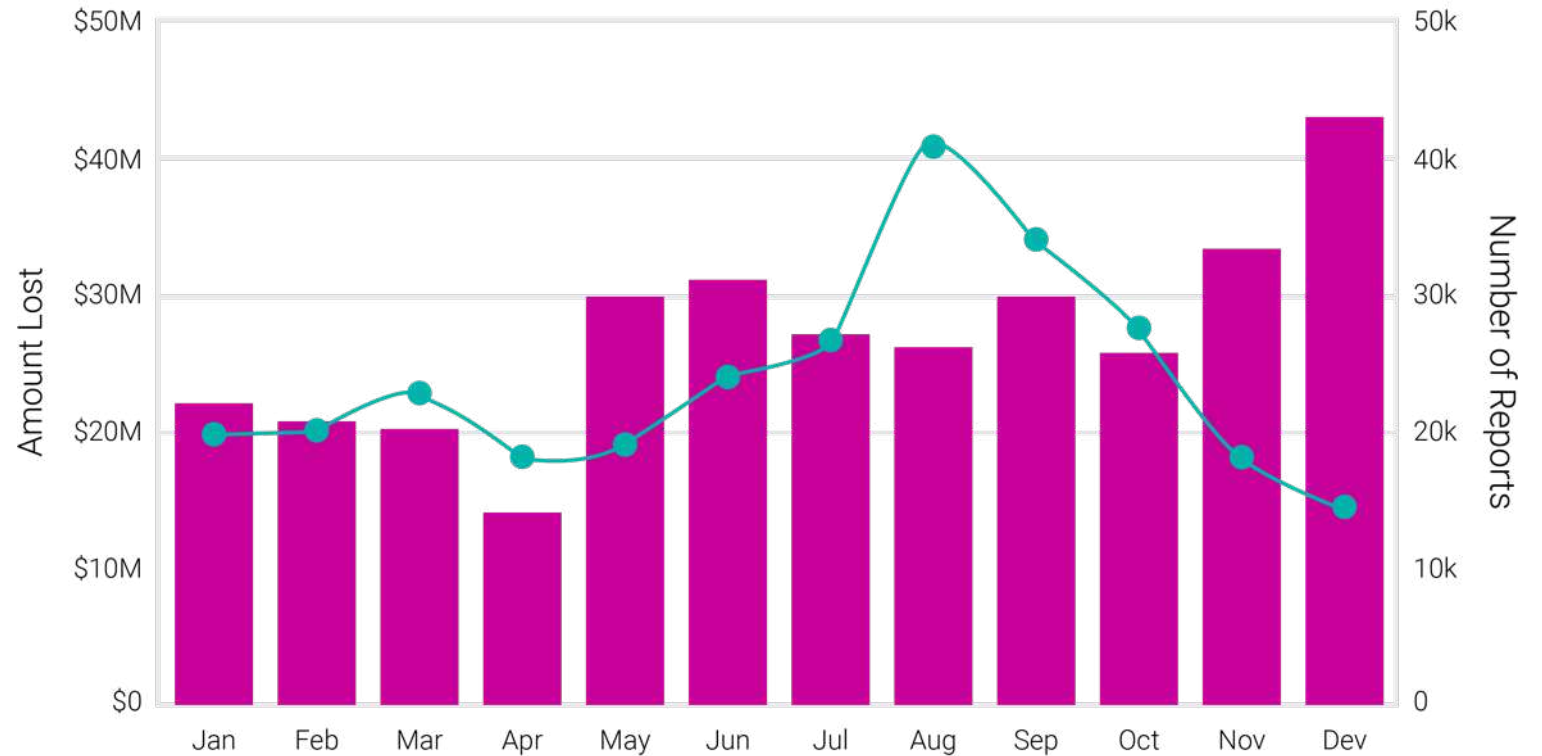
# Financial Fraud in AU 2021

**\$323,723,459**

AMOUNT  
LOST

**286,607**

NUMBER OF REPORTS



ScamWatch.Gov.Au

# Legal Penalties for Financial Fraud

Maximum penalty of 2 years  
in prison in the local court

Maximum penalty of 10  
years in the district court

But, what happens if you commit Ad Fraud?

Unfortunately, Ad Fraud is Far More Difficult to Detect, Identify, Track and Prosecute.

“ Half the money I spend on advertising is wasted; the trouble is I don't know which half. ”

- John Wanamaker

# The Impact of Ad Fraud is Felt Across the Industry

**\$81B**

Estimated amount lost to ad fraud in 2022.

**\$100B**

Estimated amount that will be lost to ad fraud by 2023

**\$75B**

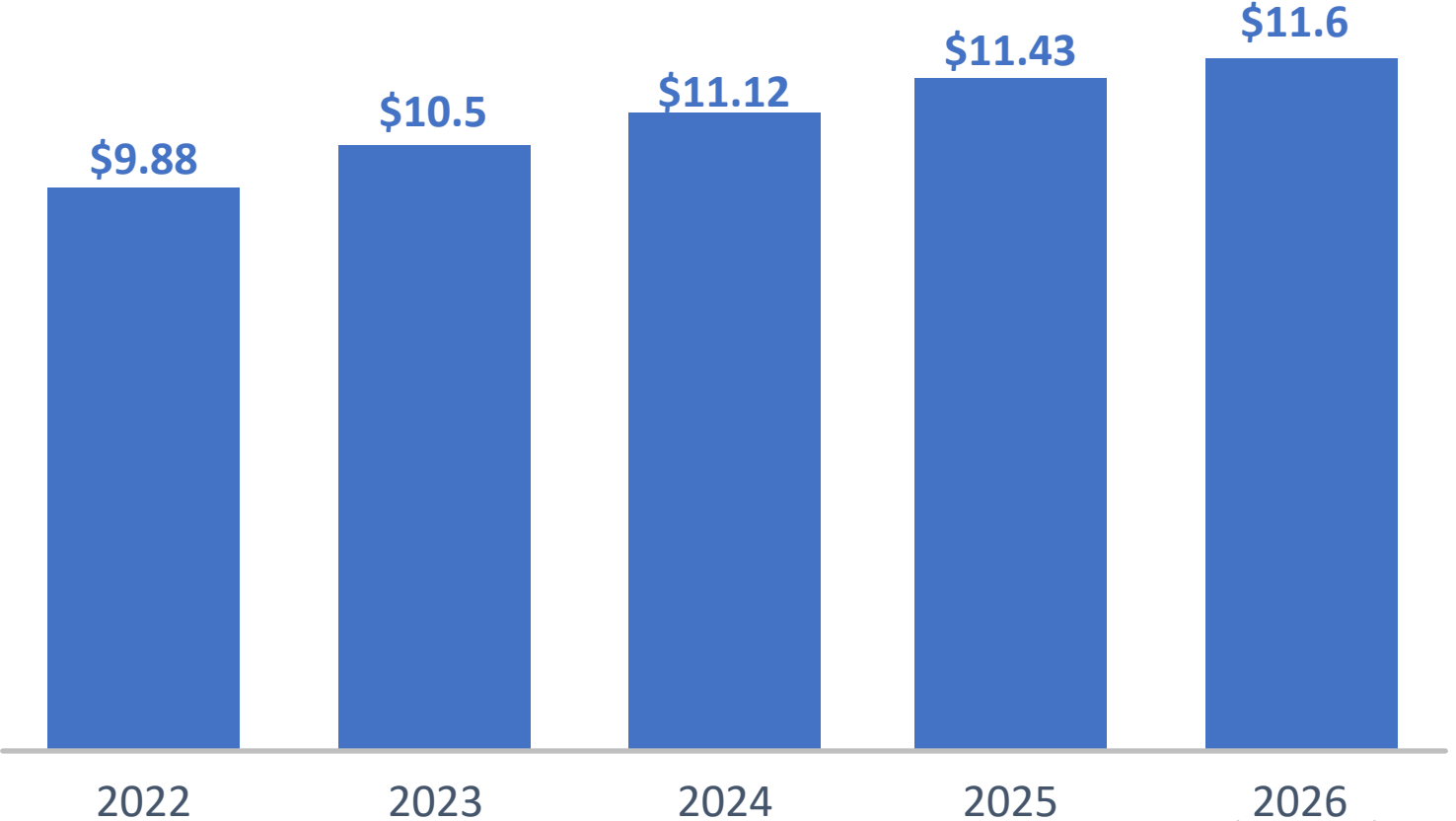
Estimated loss in APAC region in 2022



# Fraud Follows The Money

## Digital Ad Spending

Australia, 2022-2026



eMarketer, March 2022

● Billions

WHY SHOULD WE CARE ABOUT FRAUD?



**Negative Brand  
Association**



**Wasted Advertiser  
Media Spend**



**Skewed Performance  
Metrics**



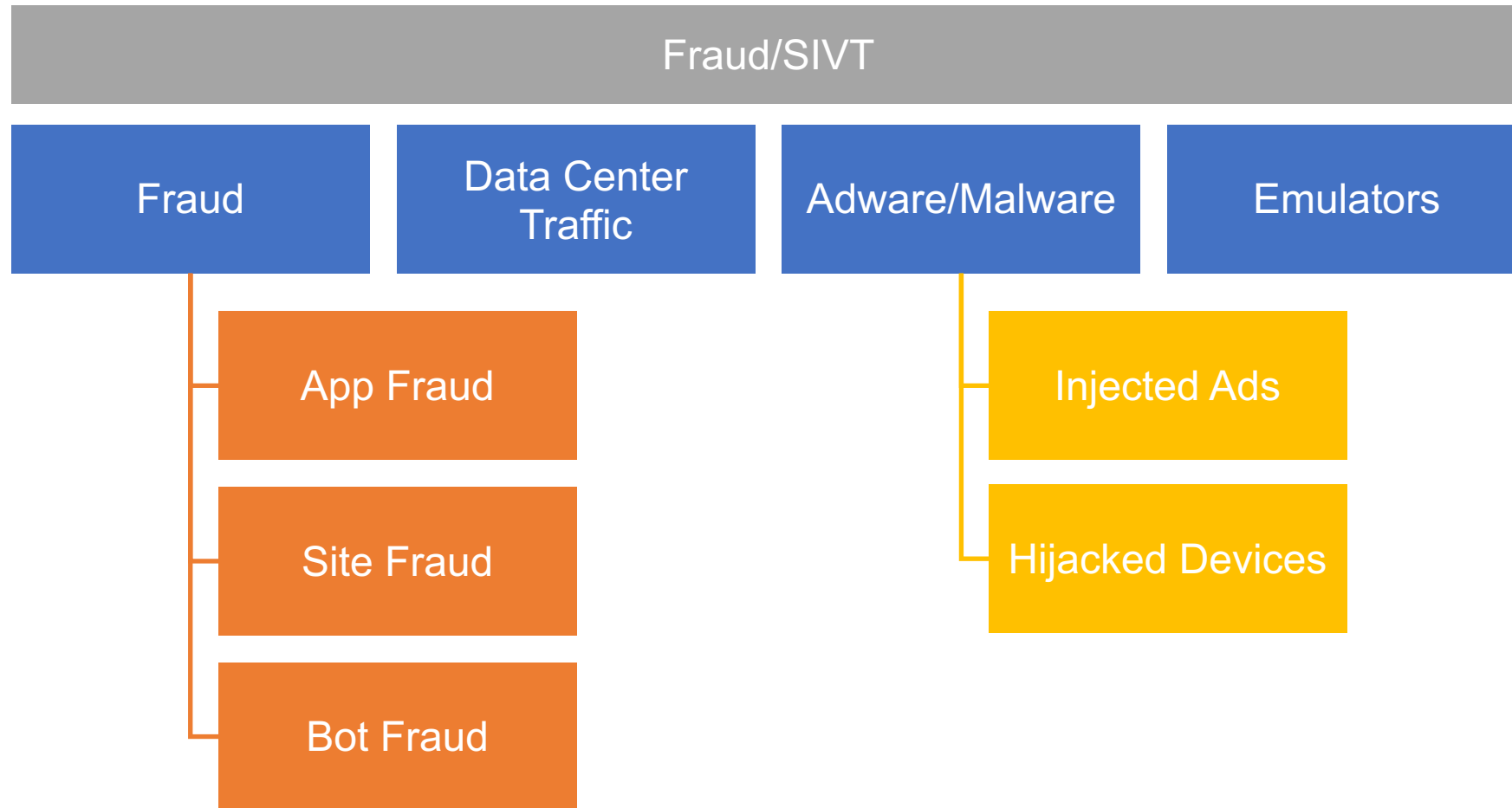
**Decrease in  
Advertisers' Bottom  
Line**

# WHAT IS FRAUD?



GIVT & SIVT

# 7 Known Types of Fraud Known Globally

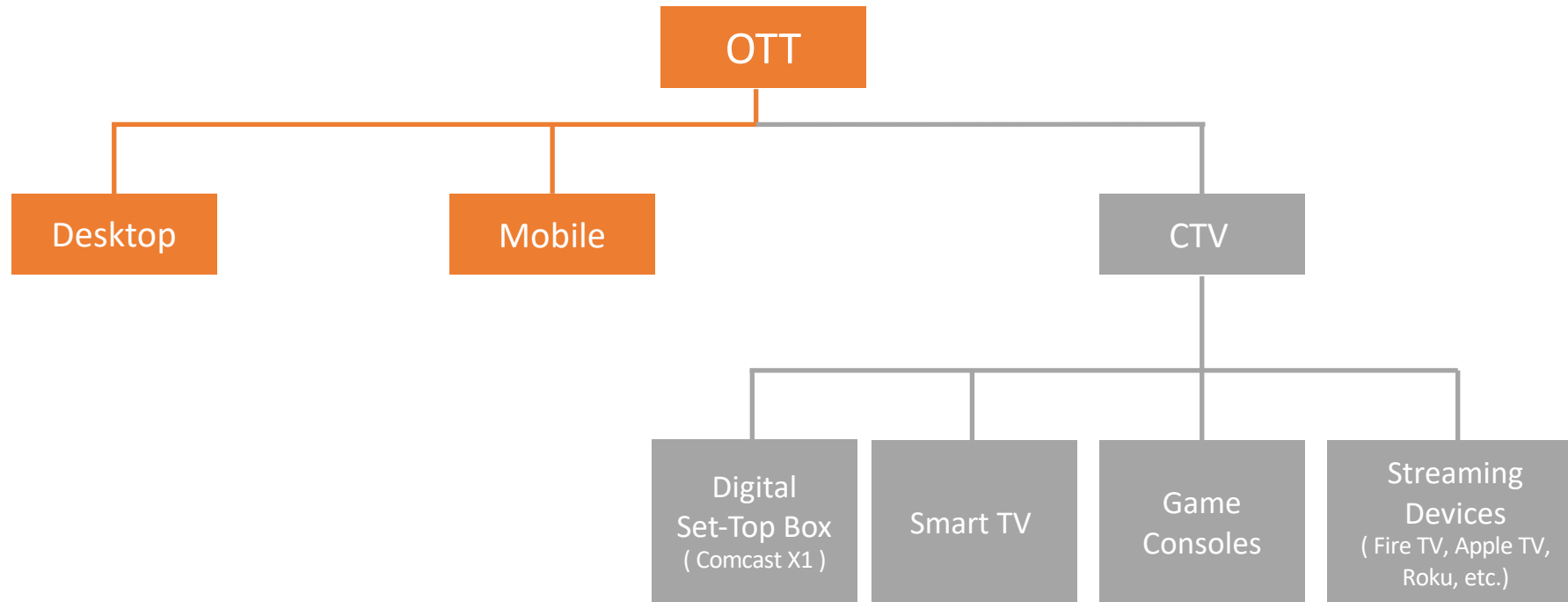


# FRAUD IN CTV





# Defining CTV & OTT



While OTT is a general term used mostly for video inventory delivered over the internet, CTV is a subset of that inventory delivered via connected TVs and dedicated devices hooked into the big screen.

“There is no fraud”

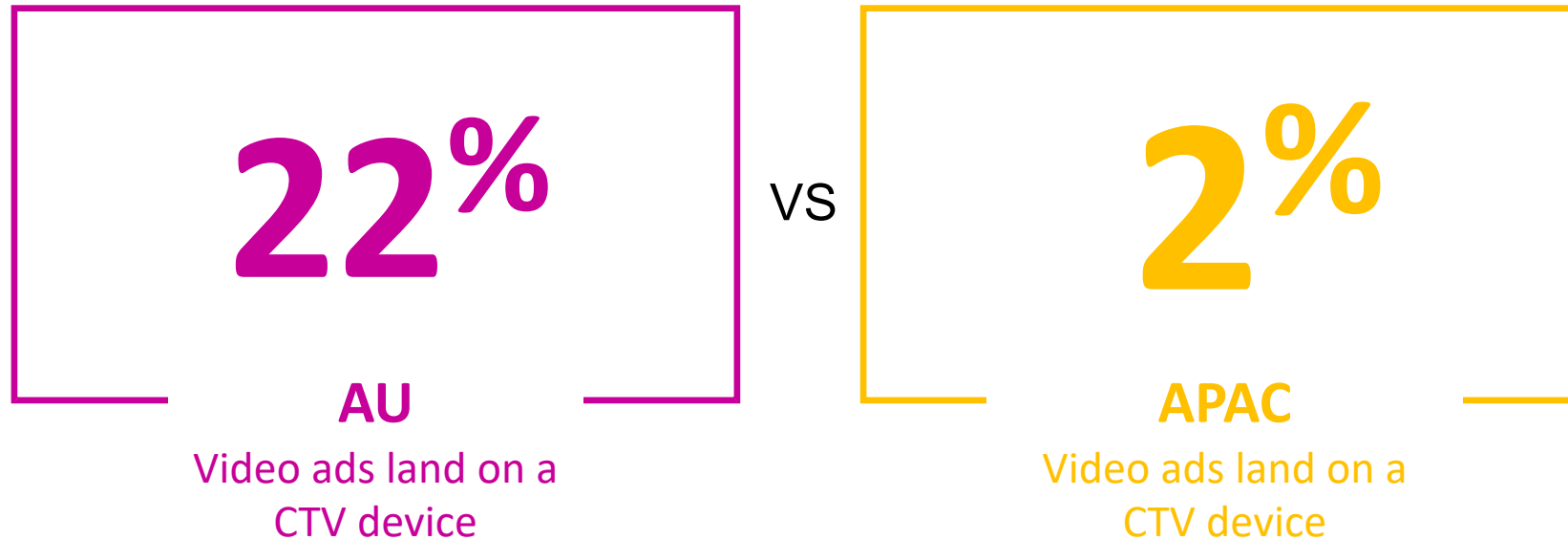
COMMON CTV MYTH

Fraud follows the money

REALITY

# Australia Is Strongly Invested In CTV

Australia has the second highest share in video ads globally, behind only the US at 26%.



# Australia Consumers Are Increasing CTV Subscriptions

46% subscribed to additional subscription services in the past 12 months



# CTV Spotlight - Fraud Follows The Money, But DV Has You Covered

150%

Fraudulent CTV impressions  
growth in 2021

2,424

Fraudulent CTV apps  
detected since 2020

580K+

Fraudulent devices  
detected/day

# Types of Fraud in CTV



## Fake Traffic

Fraudsters easily create servers, generate fake traffic and pass it on as premium impressions



## Fraudulent Apps

Hundreds of apps exist today with a few downloads generating millions of impressions



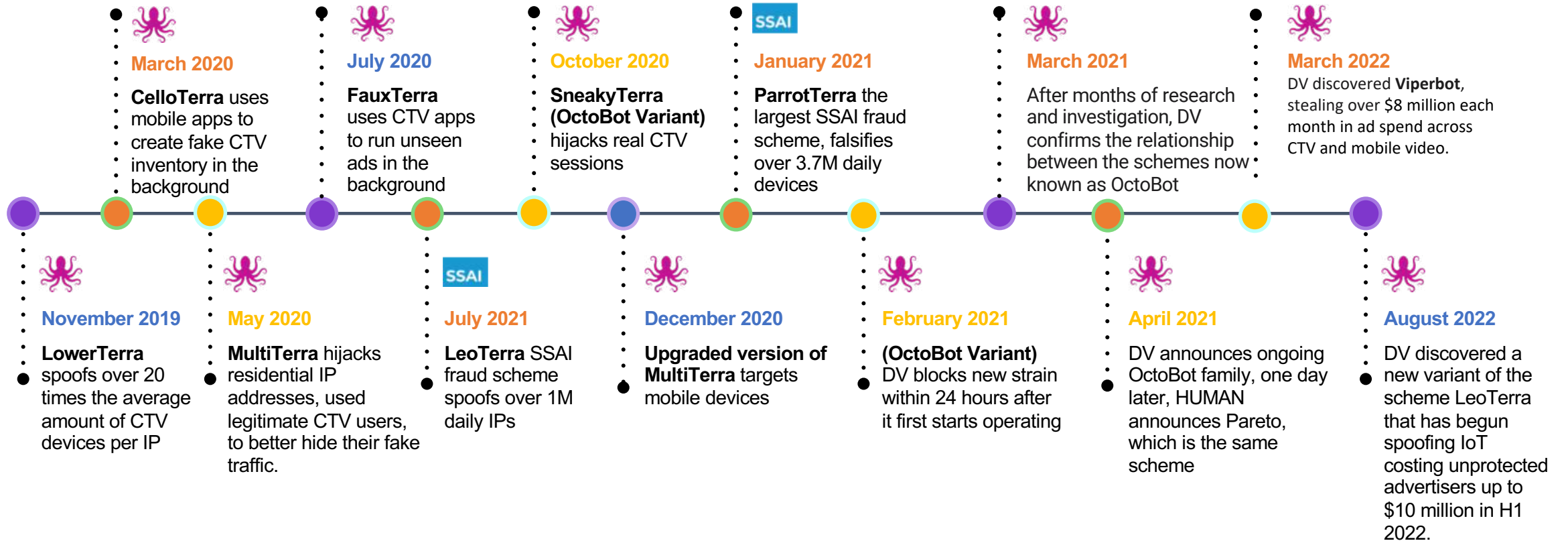
## Spoofing

Fraudsters buy low-price inventory and resell it as premium CTV video inventory at high CPMs



# Recent Timeline of CTV Schemes

Uncovering a series of CTV schemes and shutting them down with pre-bid fraud detection



# Navigating transparency in CTV



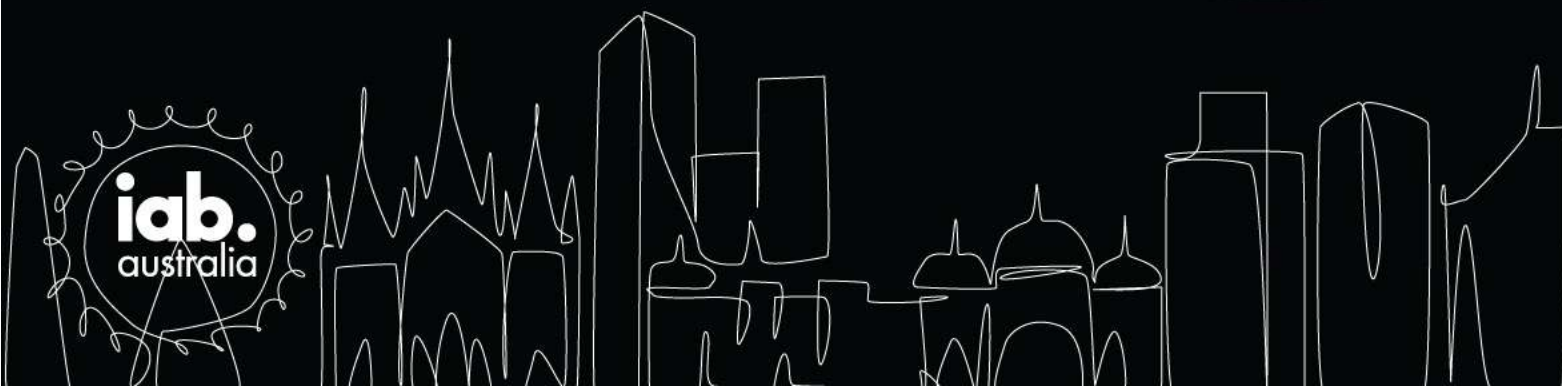
Panel discussion

# skadnetwork 4.0 - apple's updated attribution api

digital  
adops



**richard o'sullivan**  
vice president, general manager  
**inmobi**



# iOS App Growth in the Privacy-First-Era

Purpose-Built Performance Solutions for SKAN Attribution



# Agenda

Overview of SKAN 4.0 changes & why they matter

Buy-side SKAN resources and product marketing priorities

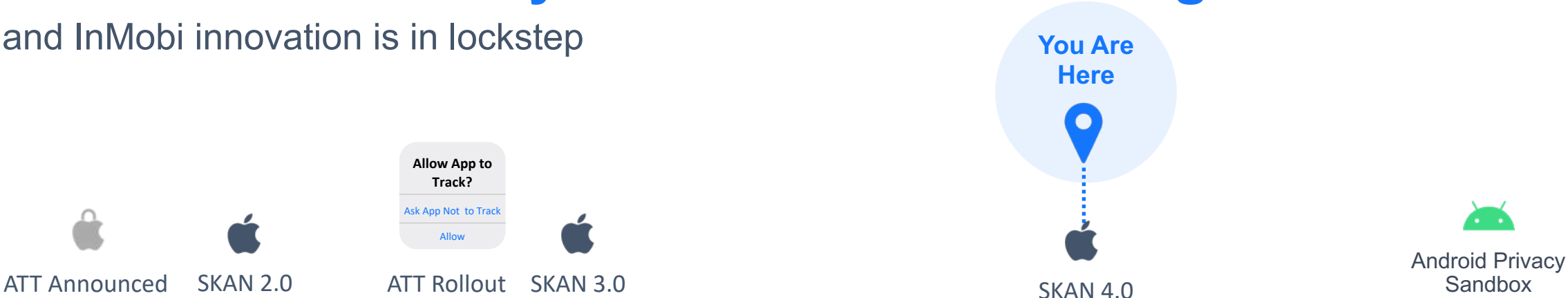
How iOS app performance marketers can win with SKAN

Q&A




# Mobile User Privacy Momentum is Building

and InMobi innovation is in lockstep



**inMOBI**  
Initiated aggressive investment in SKAN 

**inMOBI**  
Launched industry-first advanced bidder purpose-built to support SKAN 

# Adapting to Privacy-First iOS App Performance Isn't Easy

## Marketers face new challenges



Navigate complexity of SKAN



Reach the right audience without IDFA



Achieve scale with compliant inventory



Offset rising CAC



Overcome measurement and attribution limitations



Preserve user experience



Dedicated experts across media buying, product & data



Programmatic tech that relies only on privacy-safe contextual signals



SKAN-compliant integration with all major mobile ad exchanges



Proven ability to cost-effectively outperform UA goals at scale



Rich modeled insights powered by a deep bank of privacy-compliant data bridges measurement gaps



Award-winning in-house creative lab innovates formats that engage



# Now is the Time to Fully Embrace this New Reality

Capture competitive advantage ahead of SKAN 4.0 rollout

## Winning with SKAN is Possible TODAY

Leading app marketers **consistently exceed SKAN performance goals with InMobi**, putting them in the best position to make the most of SKAN 4.0 enhancements.



## SKAN 4.0 Enhancements are Meaningful

The expanded options for setting up SKAN campaign parameters and measuring conversions will bring **deeper performance insights and smarter optimization**.



## Fingerprinting is Not Sustainable

Apple has a track record of taking strong enforcement action on policy violations after sufficient warnings. **Continuing to use fingerprinting is an unnecessary risk.**



## Gain Walled Garden Visibility

**SKAN attribution has leveled the playing field** by providing full transparency into how each ad network performs, enabling an unfiltered view of your media mix on iOS.



## SKAN has CPI Advantages on iOS

**SKAN campaigns deliver UA cost savings compared with other key iOS channels**, amidst lower IDFA ad inventory and more demand for Apple Search Ads.





# Key Improvements Coming in SKAN 4.0



## BEFORE

- ✗ Single Postback Controlled by Dynamic Timer
- ✗ Binary Privacy Threshold
- ✗ 100 Campaign ID Limit
- ✗ Up to 63 Conversion Values
- ✗ In-App Ad Campaign Support Only

## AFTER

- ✓ 3 Postbacks Delivered During Defined Windows
- ✓ 3-Tiered Crowd Anonymity
- ✓ Hierarchical Source ID with up to 10,000 values
- ✓ Enhanced Hierarchical Conversion Values
- ✓ New Support for Mobile Web

# Why These Enhancements Matter



## Multiple Postbacks

Simplified delivery and new insight into post-install re-engagement



## Hierarchical Source IDs

100x more opportunities to uncover learnings that improve optimization



## Hierarchical Conversions

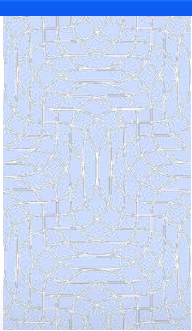
Performance insights come more rapidly, predictably and frequently



## Mobile Web Support

Additional privacy-safe channel to reach users on their mobile devices

# Gain an iOS Performance Edge by Partnering with a Pioneer



## SKAN First-Mover Advantage

## Programmatic Innovation

InMobi has **aggressively** invested in **SKAN** ever since the announcement of ATT



Building **deep SKAN-specialized bench strength**



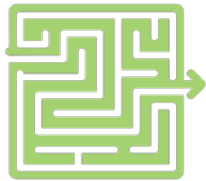
Co-innovation alongside **largest independent in-app ad exchange**



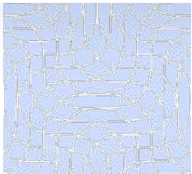
**Robust testing and rapid adoption** of each SKAN enhancement



Accumulating **rich privacy-compliant insights** that inform optimization



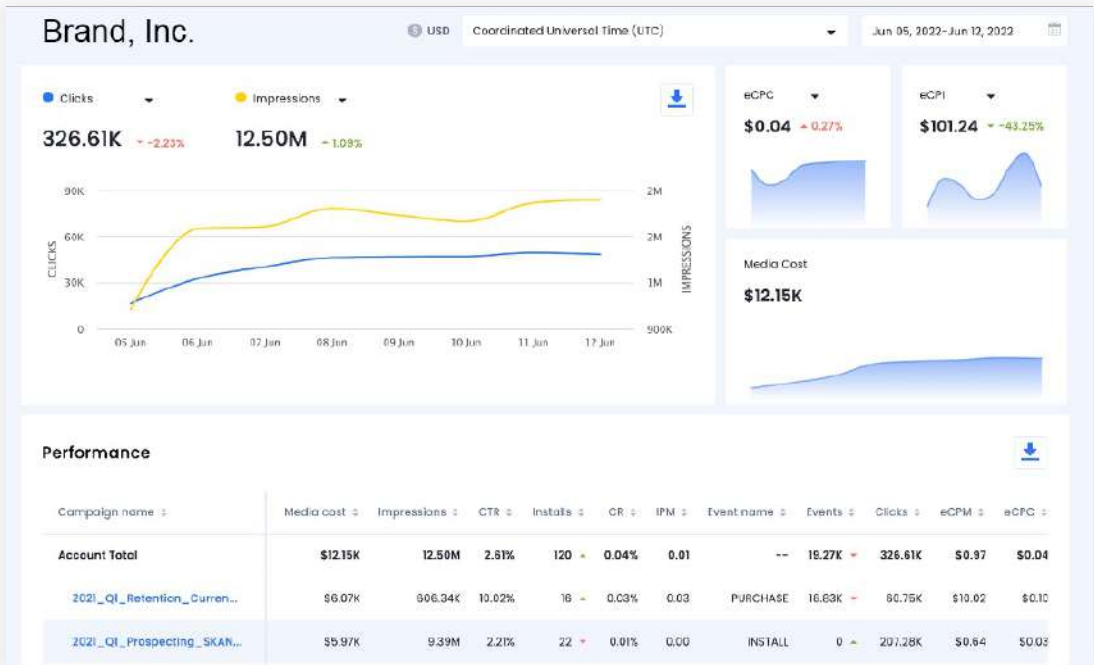
**First & only bidder purpose-built to support SKAN**



# Flexible Reporting Options for Performance Transparency

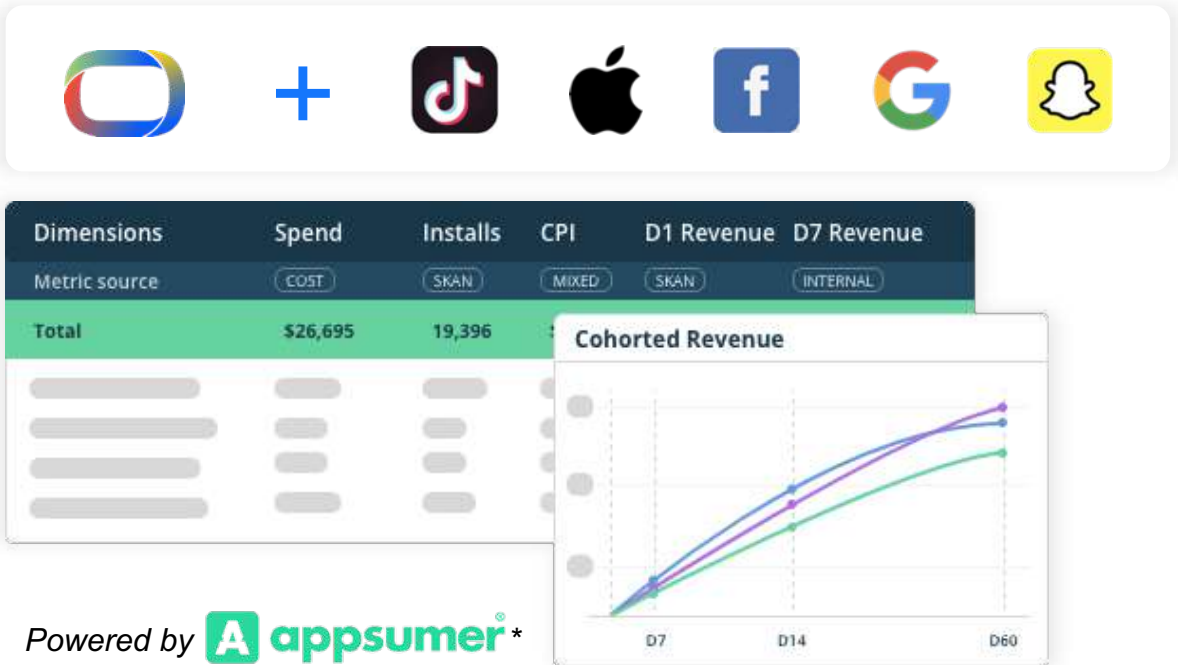
## Self-Serve Performance Dashboard

On-demand visibility into media costs and performance



## Cross-Channel Insights

Compare InMobi performance alongside up to 5 other iOS UA channels as a value-add



# Partner with a Proven iOS App Performance Leader

We're helping leading iOS apps adapt and thrive with SKAN attribution worldwide

## SKAN Performance Highlights



Gaming

**88%**

D7 ROAS



QSR

**200%**

More installs VS.  
competitors at same CPA



Commerce

**50%**

Lower CPI VS.  
competitors



Media

**6x**

Daily install  
growth



Social

**600%**

Better install rate  
VS. competitors



DTC

**2x**

Above registration  
rate goals



*InMobi is the **first & only SKAN partner able to fully scale...** From our vantage point, **InMobi is definitely leading the charge on SKAN** and scaling paid app installs on iOS post-ATT!*



**Agency Account Lead,  
Major HoldCo**

# Significant SKAN-Compliant Scale Across Key iOS Markets

## Average Monthly SKAN-Compliant Bid Opportunities



USA  
874B



Japan  
176B



UK  
48B



Canada  
40B



Germany  
15B



France  
16B



Australia  
30B



Mexico  
18B





# We're Here to Help You Thrive in the Privacy-First Era



## Tips for Success with SKAN Attribution

---

- ✓ Find demand-side partners with **SKAN expertise**
- ✓ Work with both MMP and DSP partners **to optimize Conversion Value Mapping**
- ✓ **Allow ample time and budget for machine learning exploration**
- ✓ **Acknowledge & Support VTA** as a valuable signal
- ✓ Leverage **Modeled Conversions when postback value is NULL**
- ✓ Adopt **dynamic CPM Billing** Models (limited trial before moving to CPI/ CPA)
- ✓ Verify **supply sources comply with latest SKAN version**

# Latest SKAN PMM Resources

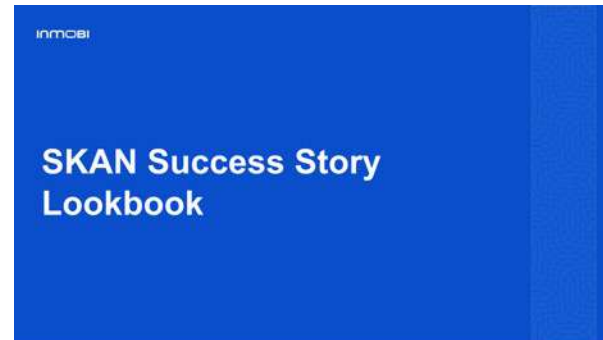


Pitch Slides

Sell Sheet



How InMobi SKAN UA Solution Works Whitepaper

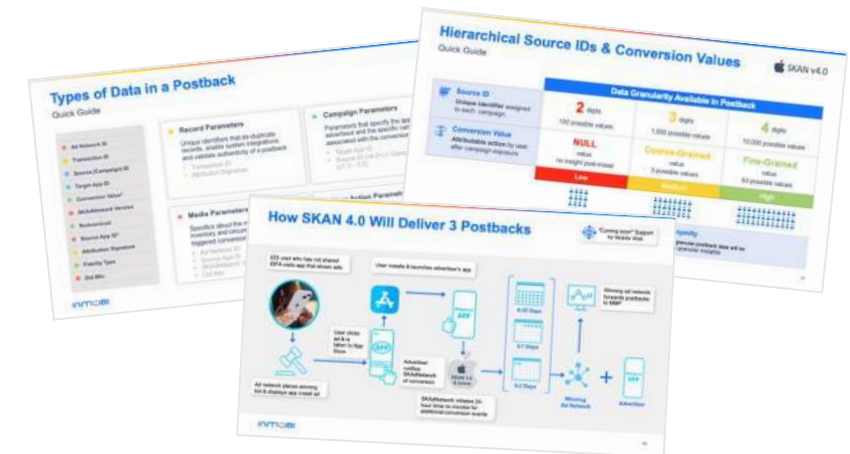


SKAN Success Story Lookbook



Client & Prospect Friendly Workshop Materials

**\*\*Interested in hosting a workshop for a client or prospect? Contact [Crisna.Hai@inmobi.com](mailto:Crisna.Hai@inmobi.com) to request support**



**\*\*Workshop slides include Quick Guides on key SKAN features and 4.0 changes**

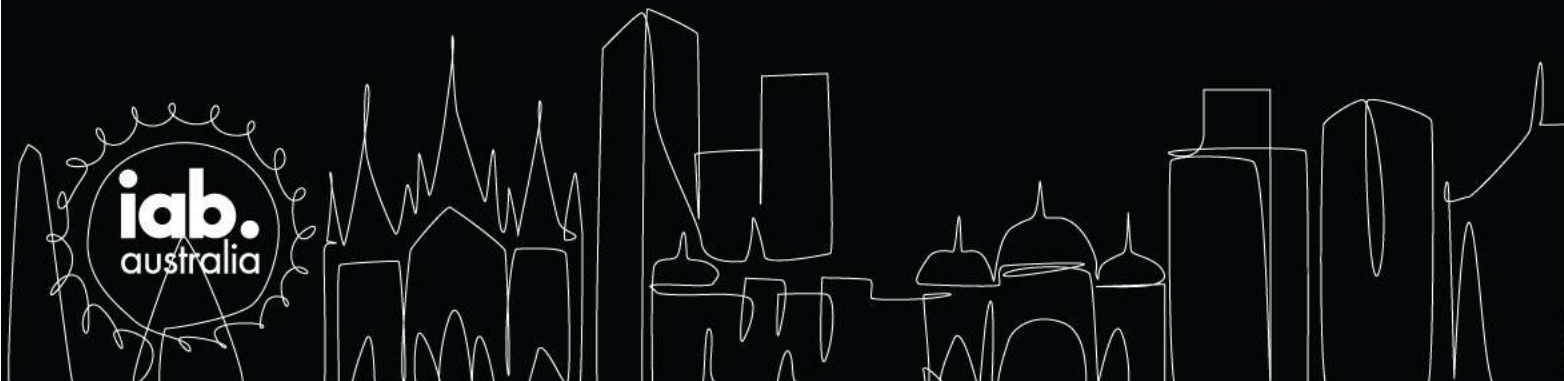


# working culture & careers

digital  
adops



**tiffany damm**  
general manager  
unltd



iab.  
australia

**Mentally-  
-healthy**

**NEVER  
NOT  
CREATIVE**

# **Mentally Healthy 2022: The Results**



**MENTALLY-HEALTHY 2022**  
**THE THIRD  REPORT ON**  
**THE  MENTAL HEALTH OF**  
**THE CREATIVE,  MEDIA &**  
**MARKETING INDUSTRY**



# RESEARCH BY

---

NEVER  
NOT  
CREATIVE

UnLtd:

Mentally-  
healthy CHANGE  
GROUP

---



# 1,397 RESPONDENTS



27% CREATIVE  
44% MEDIA AGENCY  
13% MEDIA OWNER

32% MALE  
67% FEMALE  
1% NON-BINARY/  
OTHER TERM





# OUR INDUSTRY'S MENTAL HEALTH

M-  
H

M-  
+

M -

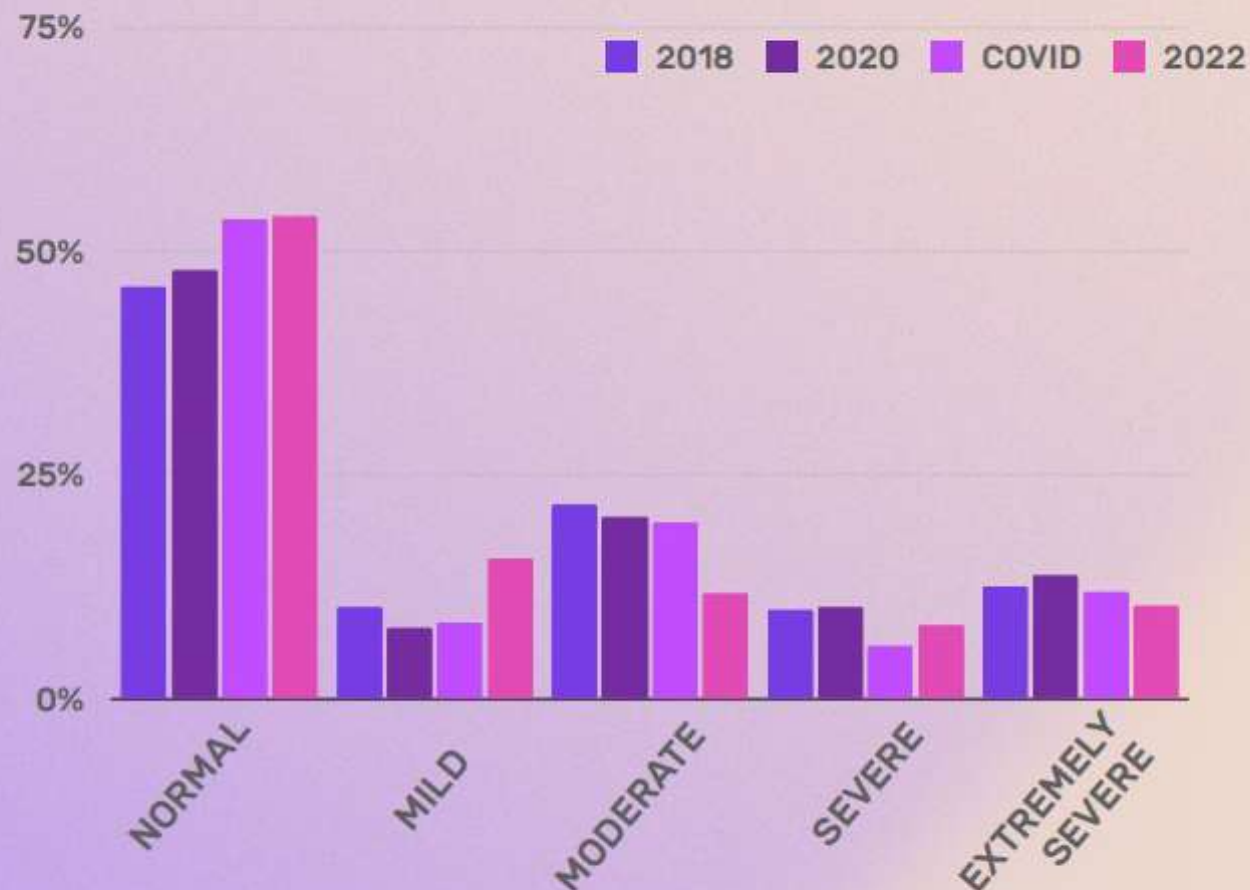
WE  SEEM  A  
LITTLE HEALTHIER

M -



# 46% OF OUR INDUSTRY DISPLAY MILD TO SEVERE LEVELS ON THE ANXIETY SCALE

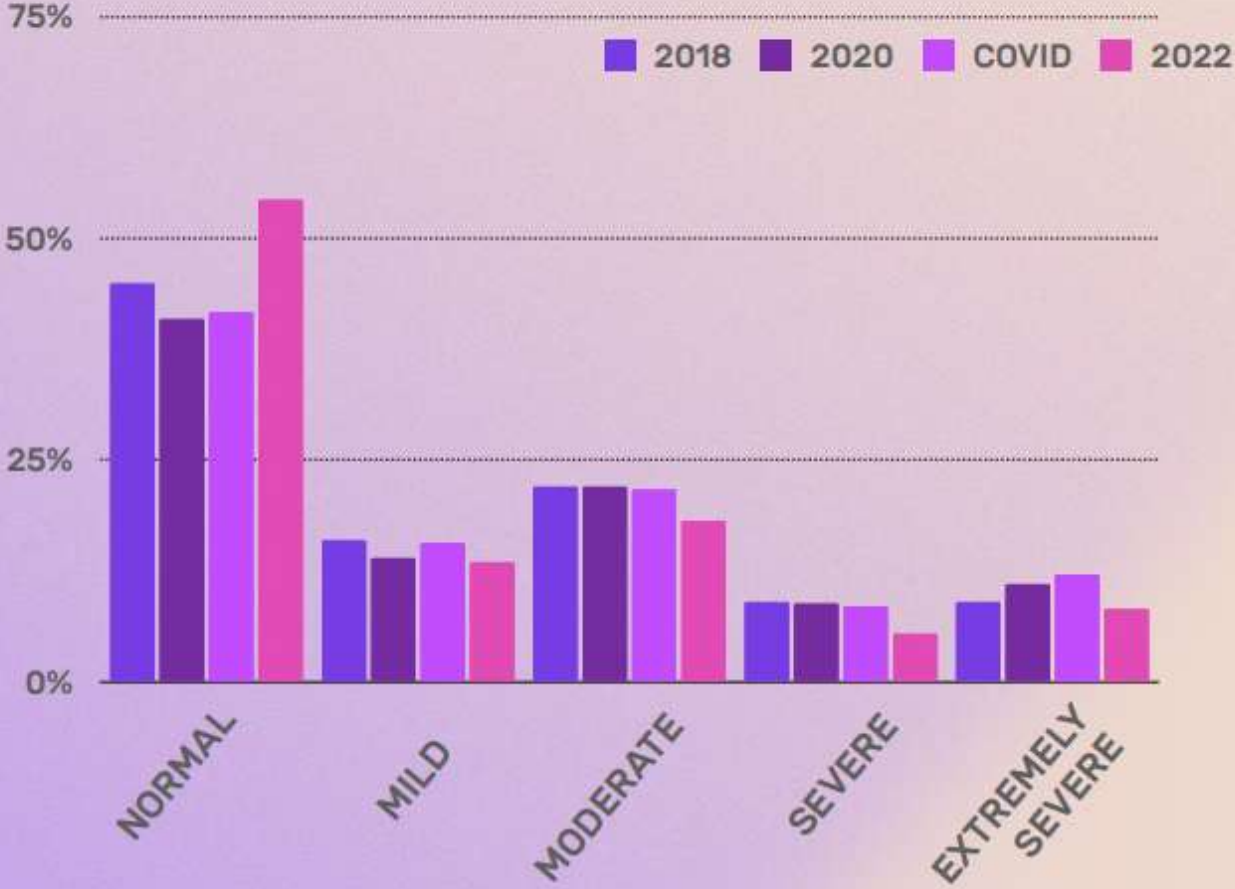
33% MODERATE TO SEVERE





# 46% OF OUR INDUSTRY DISPLAY MILD TO SEVERE LEVELS ON THE DEPRESSION SCALE

30% MODERATE TO SEVERE





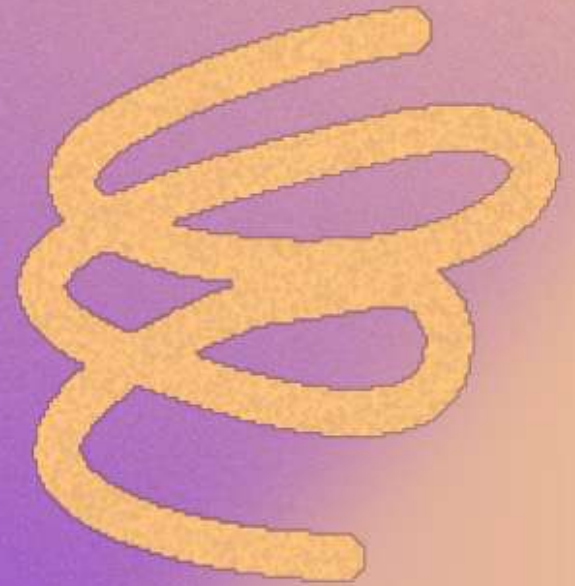
**19% SHOW SEVERE SYMPTOMS  
OF DEPRESSION**

**14% SHOW SEVERE SYMPTOMS  
OF ANXIETY**





**If you're under 29,  
you're 1.5x more  
likely to show signs  
of depression than  
respondents over 40**



# STRESSORS

PRESSURE OF OWN EXPECTATION



■ 2022

PRESSURE FROM OTHERS



MULTIPLE RESPONSIBILITIES



UNREALISTIC EXPECTATIONS



LONG HOURS



PRESSURE TO STAY UP W TECH



ALWAYS ON



SELF-DOUBT



WORKING WHEN SICK



NO STRESS

EXTREME STRESS

Survey: Please indicate the level of stress, based on your own experience, that is associated with the following aspects of working in the industry



# SLEEP

## SLEEP RECOGNISED AS A KEY DRIVER OF GOOD MENTAL HEALTH

The Sleep Health Foundation recommend 7 to 9 hours of sleep for adults a night

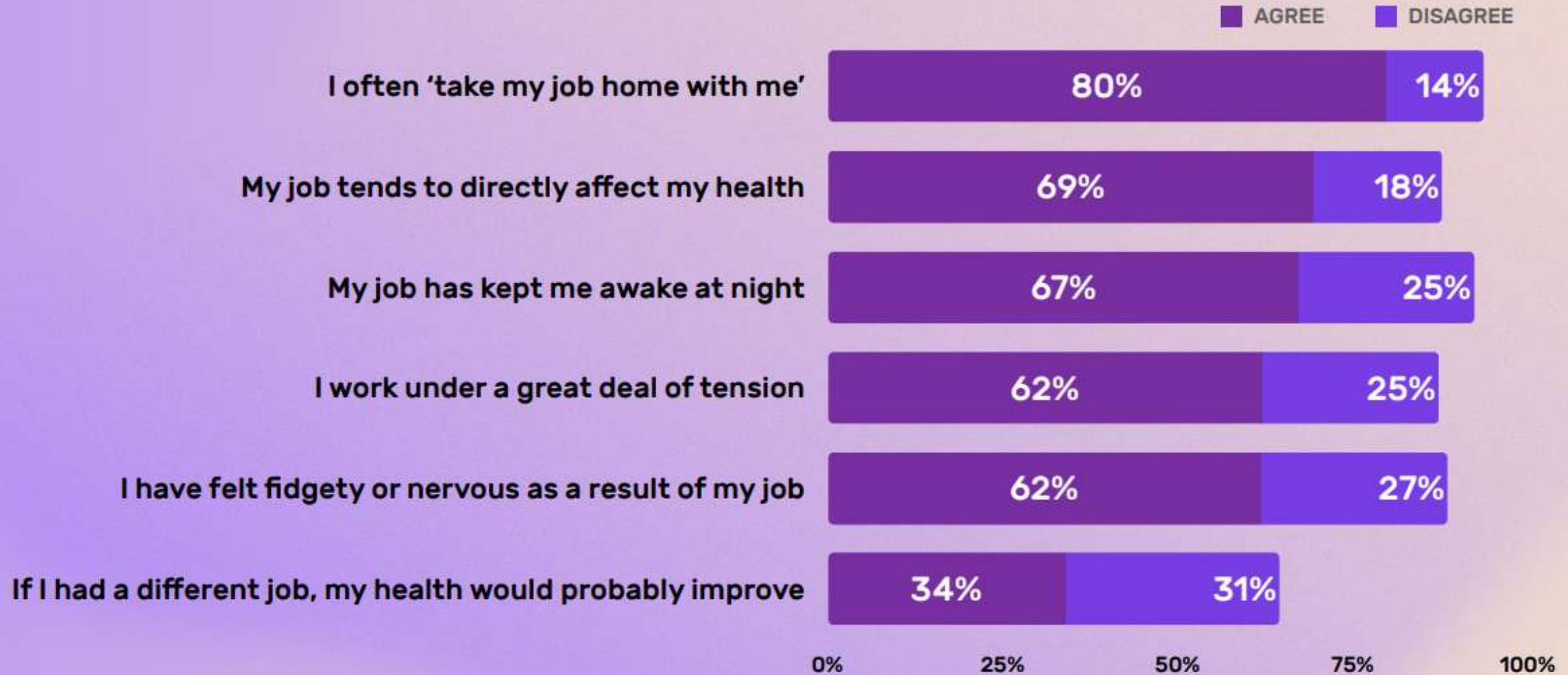
2020 2022

## QUALITY OF SLEEP IS BETTER COMPARED TO 2020 RESULTS



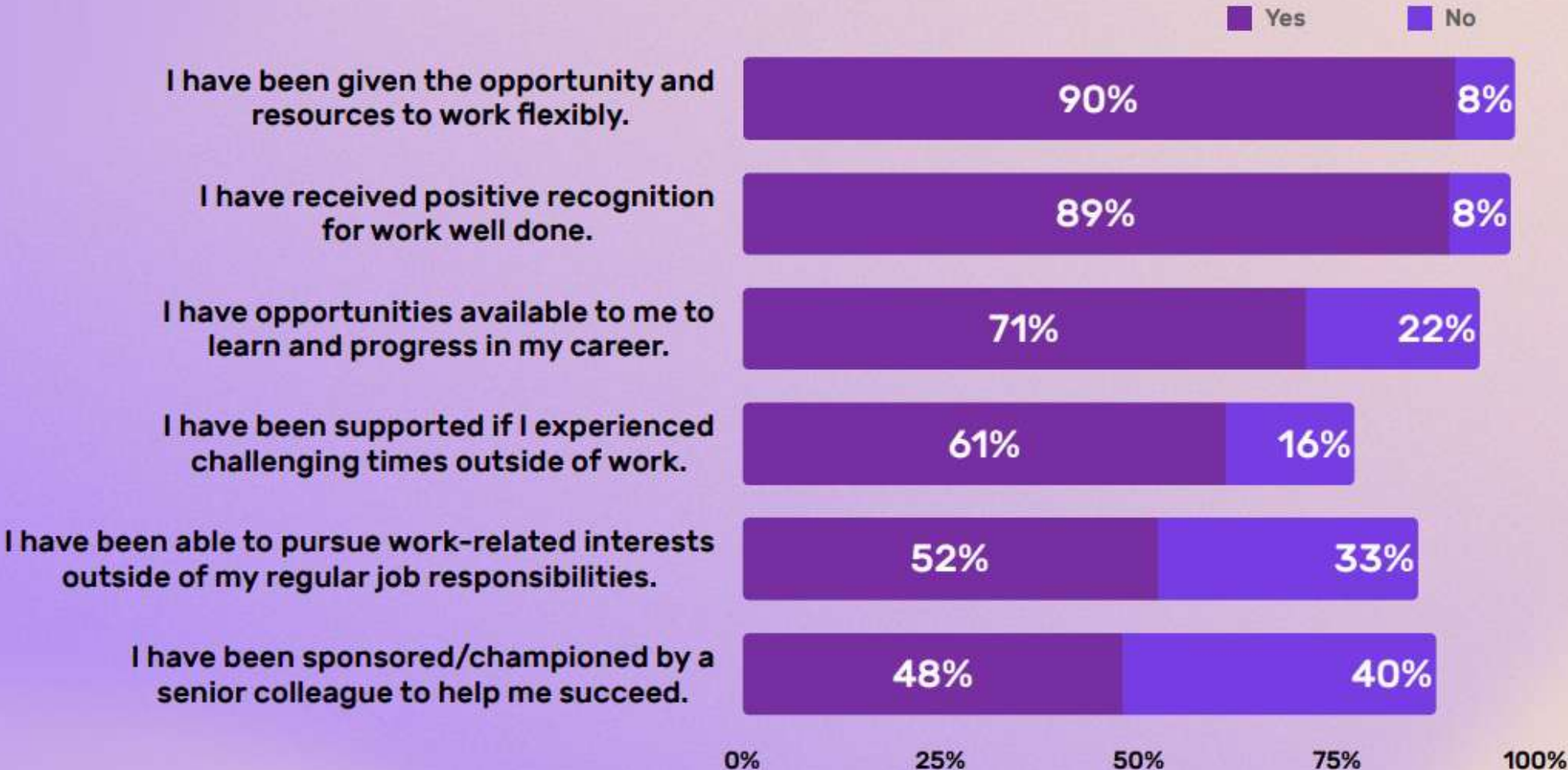
Survey: On average, how would you rate your sleep quality over the past 4 weeks?

# OUR JOB AFFECTS OUR HEALTH



Survey: Q26. Please rate your level of agreement with the following statements:

# GOOD EXPERIENCES AT WORK



Survey: Q26. Please rate your level of agreement with the following statements:



# BAD EXPERIENCES AT WORK



Survey: Q26. Please rate your level of agreement with the following statements:



# SIGNIFICANT DIFFERENCES BETWEEN CREATIVE AND MEDIA

I have opportunities available to me to learn and progress in my career.

79%

60%

I have been interrupted or not listened to in meetings.

39%

55%

I felt undervalued compared to colleagues of equal competence.

27%

34%

I have been bullied or undermined in some way.

12% vs 26%

I have been verbally harassed, insulted or received other hurtful comments.

7% vs 15%

MEDIA CREATIVE



# ATTITUDES TOWARDS MENTAL HEALTH...

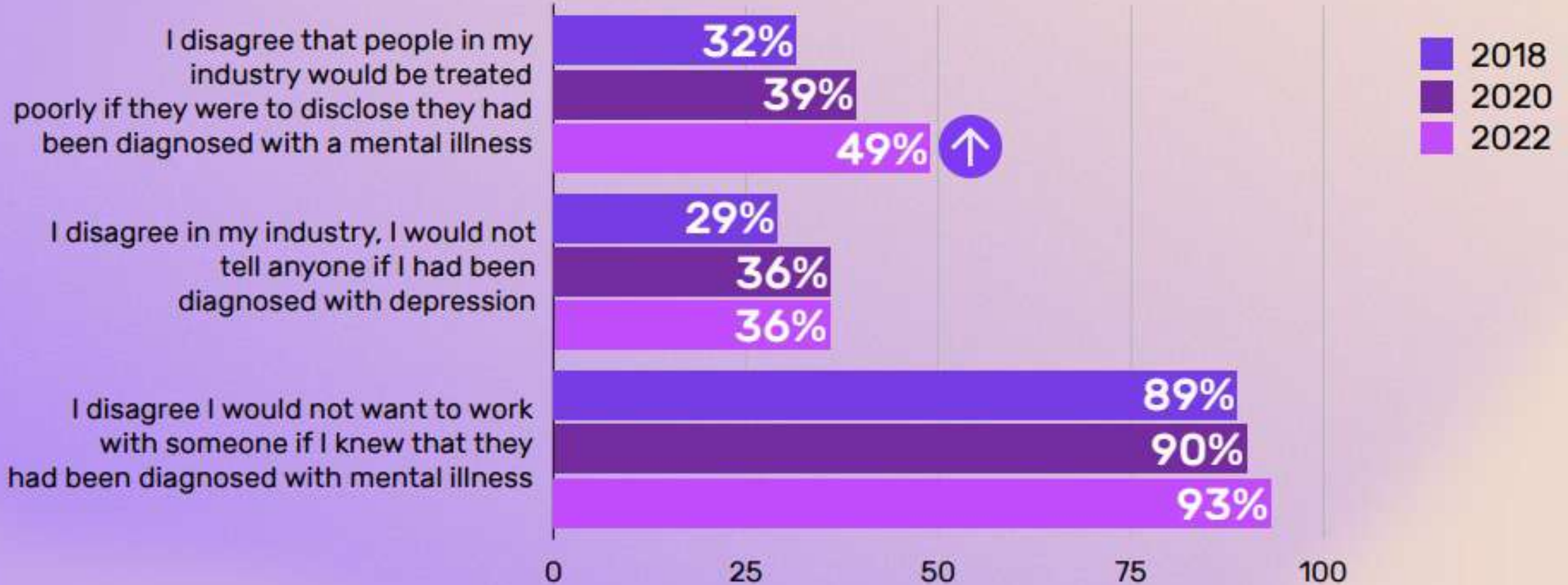
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...HAVE  IMPROVED

# 24% IMPROVEMENT



Survey: Please rate your level of agreement with the following statements



**66% OF UNDER 25'S  
DISAGREE THAT  
PEOPLE WILL BE  
TREATED POORLY IF  
THEY DISCLOSE  
DEPRESSION**

**WE NEED  TO LOOK  
OUT FOR YOUNGER  
PEOPLE**

**BUT 52% WITH POOR  
MENTAL HEALTH  
AGREE THEY WOULDN'T  
TELL ANYONE  
IF THEY HAD**



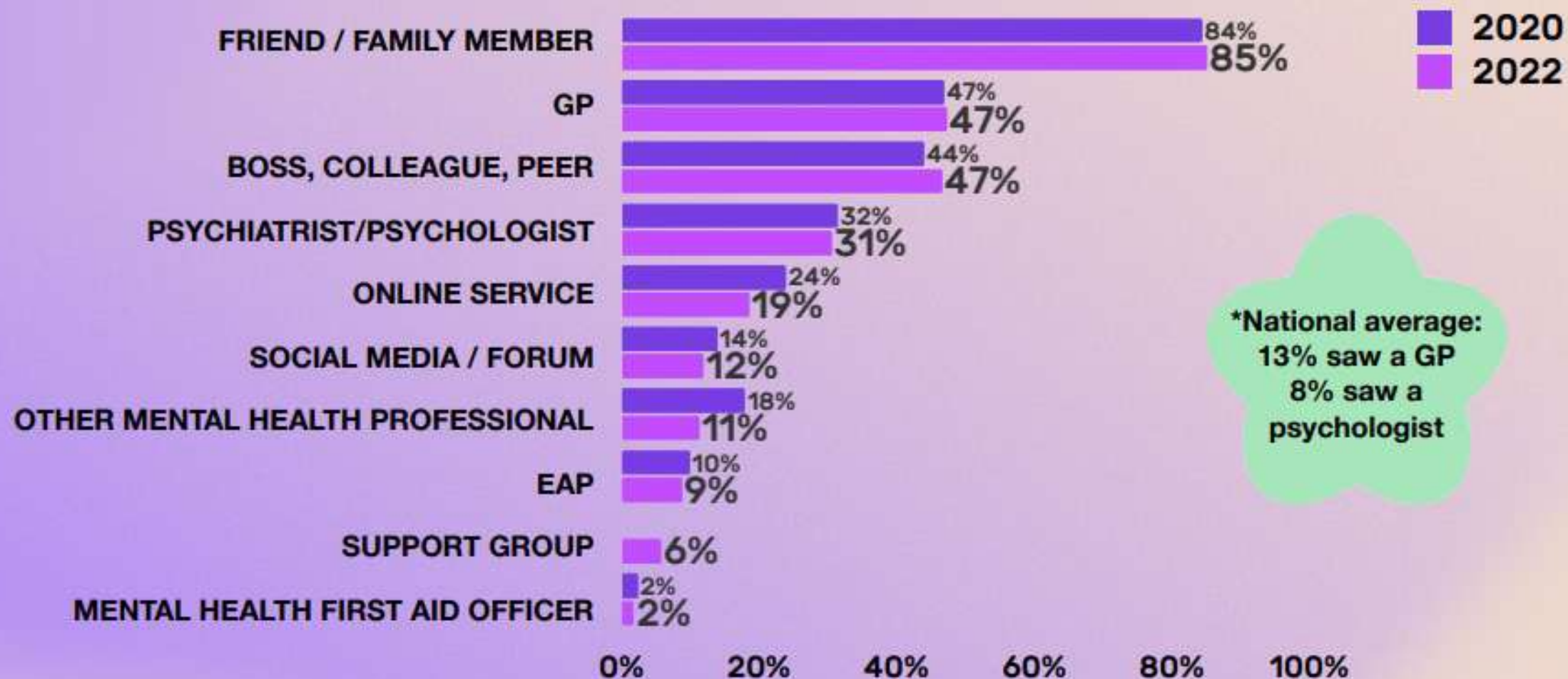
# CONFIDENCE COMES WITH AGE?

**26% U-25  
DISAGREE THEY'D  
TELL SOMEONE**

**36% 25-34  
DISAGREE THEY'D  
TELL SOMEONE**

**40% 35-44  
DISAGREE THEY'D  
TELL SOMEONE**

# WHO DO WE GO TO FOR HELP?



In the past 12 months, how many times have you consulted with the following types of support to discuss your own mental health problems?

\*ABS National Study of Mental Health and Wellbeing 2020-21





**WHAT ARE  
EMPLOYERS DOING  
ABOUT MENTAL  
WELLBEING?**

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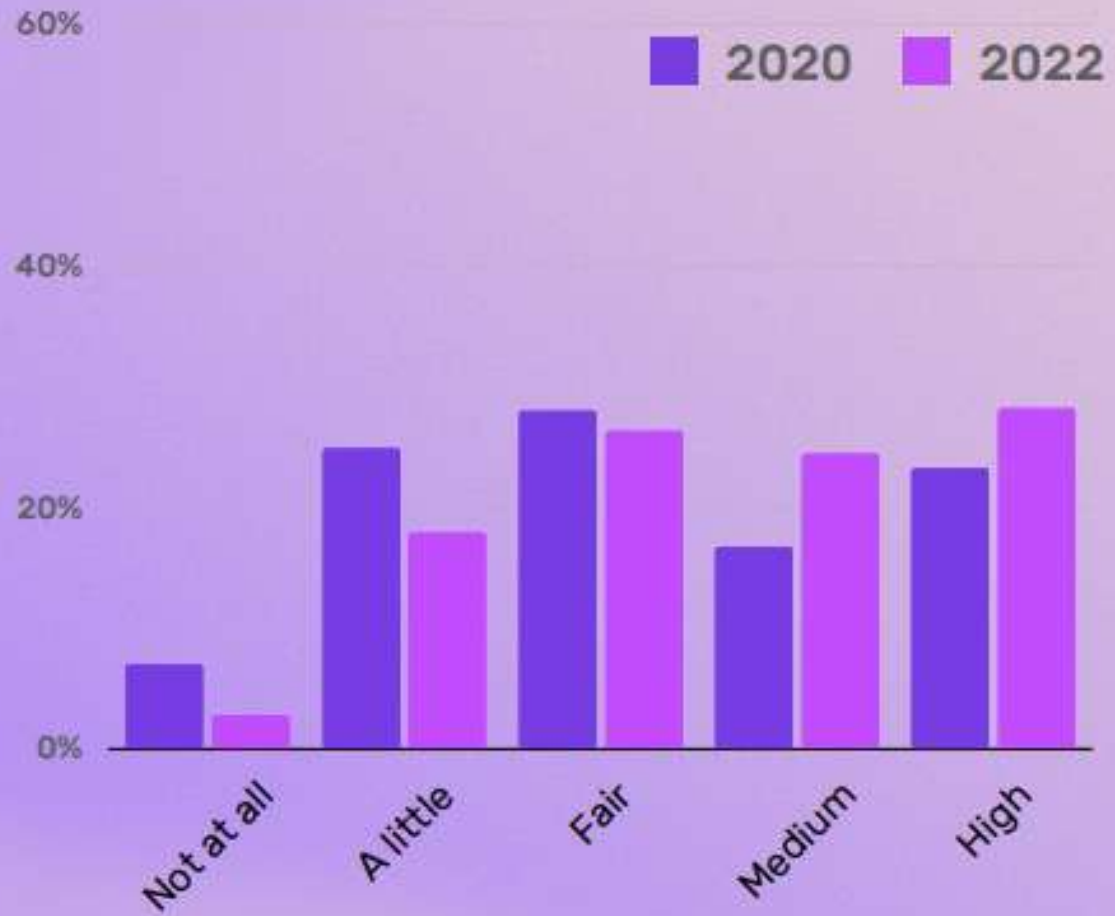
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# **53% BELIEVE MENTAL HEALTH IS A MEDIUM-HIGH PRIORITY**

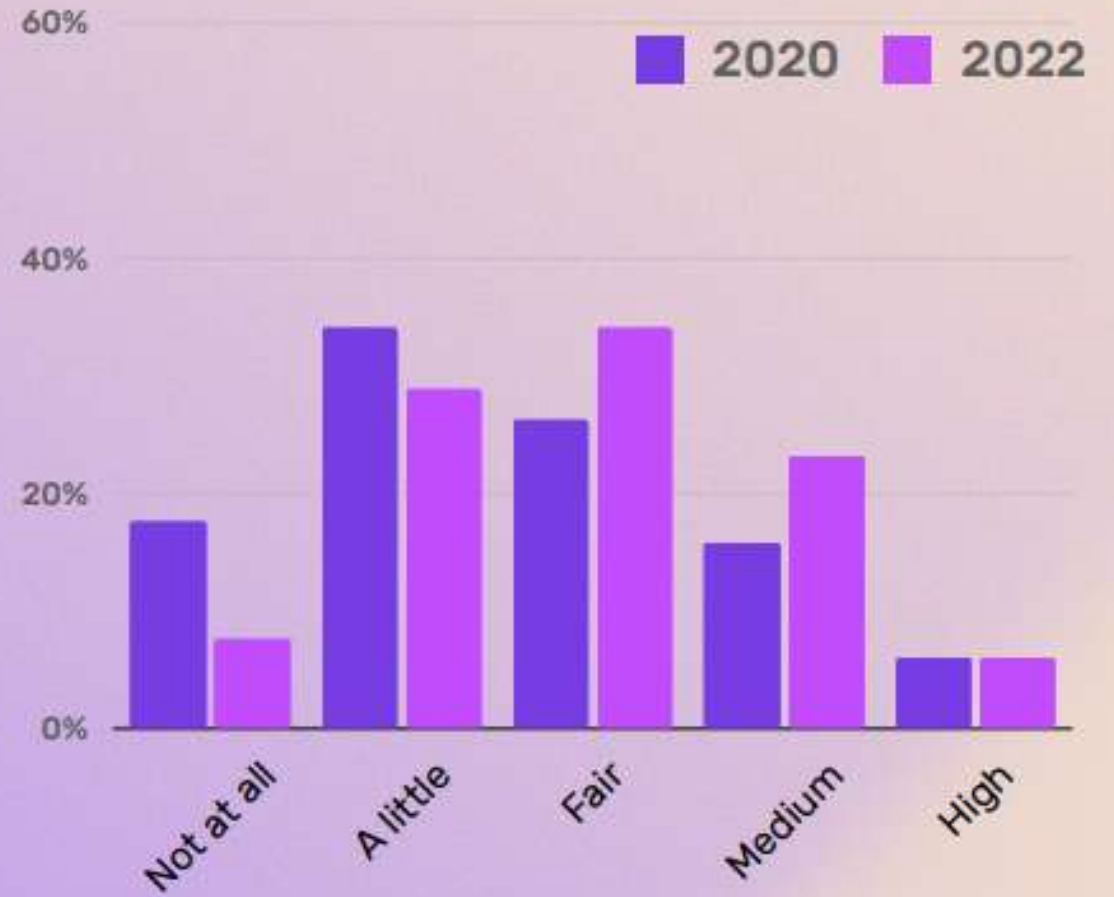
**33% INCREASE IN BELIEF THAT BUSINESSES ARE MAKING MENTAL HEALTH A MEDIUM-HIGH PRIORITY**

**AND THE SAME INCREASE IN THE BELIEF THAT STRATEGIES AND INITIATIVES ARE EFFECTIVE**

# PRIORITY



# EFFECTIVENESS



Survey: How seriously does your workplace take the mental health of its employees? AND How effective do you think your business' efforts are in addressing the mental health of its employees?



**LEADERS RANK  
THEIR BUSINESS  
51% MORE  
EFFECTIVE THAN  
EMPLOYEES**

**MEDIA AGENCIES  
RATED AS 72% MORE  
EFFECTIVE THAN  
EQUIVALENT  
RESPONDENTS IN  
CREATIVE AGENCIES**

**WHEN WE DIG DEEPER  
THERE'S STILL A LONG  
WAY TO GO**

Survey: How seriously does your workplace take the mental health of its employees? AND How effective do you think your business' efforts are in addressing the mental health of its employees?

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THERE'S NO 🏠 SILVER  
BULLET, BUT THERE  
ARE 🌸 MANY HELPFUL  
➔ SIGNALS 👁️

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+



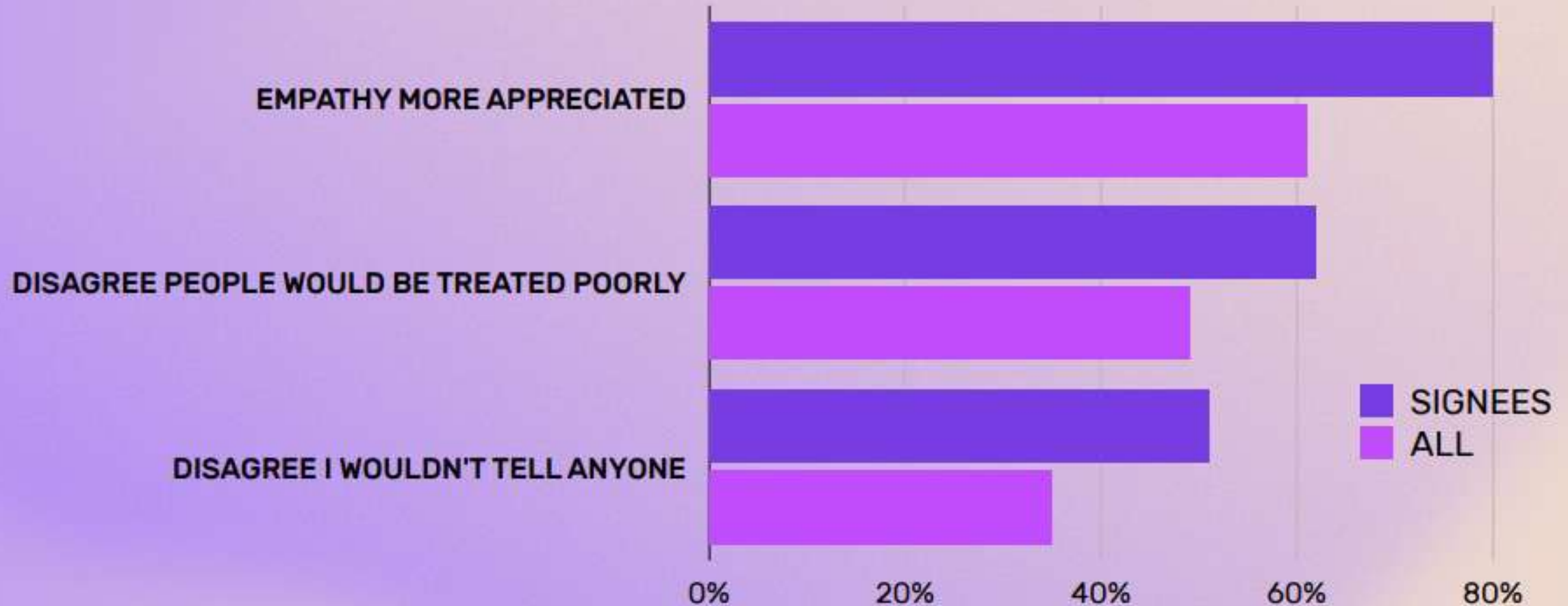
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MINIMUM



STANDARDS

# COMPANIES THAT HAVE SIGNED THE MINIMUM STANDARDS



Survey: How much do you agree with the following statements (signees vs no or unsure)







# iab resources

training & development

**programmatic advertising and trading**  
deakin microcredential

now open



august 2022

**digital advertising & ad tech industry talent review.**



microcredential

**digital advertising operations**



2022

# digital adops

iab.  
australia

