

financial year 2022
**annual
report.**

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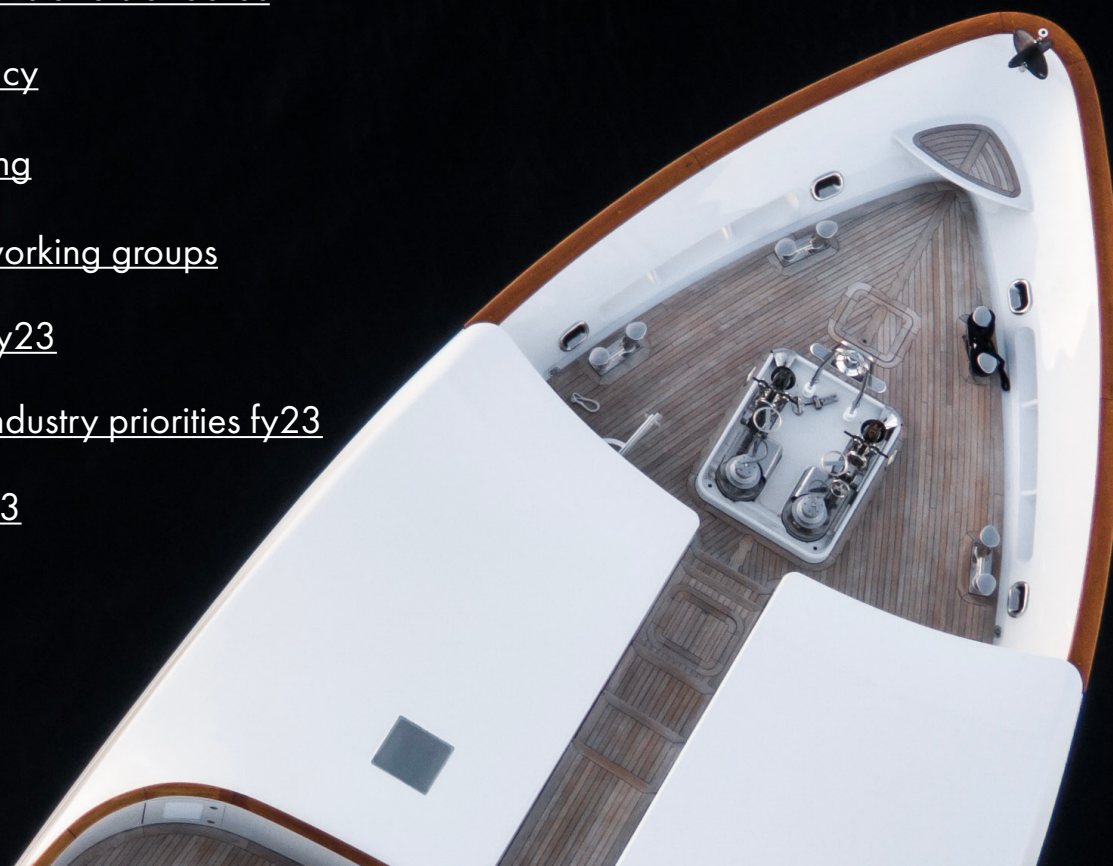
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a note from our chair & ceo

It has again been a privilege to be the Chair of IAB Australia during FY22 and a delight to see the impact, influence, and member base grow throughout the year. One of the most important roles that the IAB plays in market is supporting our people with a range of programs. The mentorship program has been an impressive initiative that was developed by the Executive Technology Council that has seen over 260 people spend six months supported by a senior industry leader. I personally volunteer as a mentor, and I can highly recommend it to any senior leader looking to support and develop the next generation.

The talent shortage was a major focus for the IAB board throughout FY22 and after a major review of market needs in terms of both attracting new talent and upskilling the capabilities of our current people it was decided to invest more IAB resources into this area. The appointment of a full time Director of Learning and Development, the roll out of e-learning programs, partnering with Deakin University to develop industry and academic co-created post graduate micro-credentials and developing stronger relationships with a range of tertiary institutions are all having a huge impact in market.

I would like to thank my fellow board members, council chairs and participants and the whole member base for investing time and funds into continuing to improve our amazing industry.



nicole bence

network digital sales director
seven network | iab chair

The Australian digital advertising industry experienced significant growth in FY22 with revenues of \$13.9B, an increase of 22% on FY21, and although there is some softening of the economic environment as we progress through FY23, the digital industry continues to expand in the types of channels, formats and offerings available to help marketers drive business growth and provide a wide range of free content and services for consumers through the ad-supported ecosystem.

As well as continuing existing programs of work and supporting the local industry, FY22 has seen IAB Australia go through a significant period of growth and investment in essential initiatives to address the needs of the market. The team has expanded with new executives appointed to support policy and regulatory affairs as well as learning and development functions. We saw 20 new organisations join the IAB financial member base bringing the total number of local members to 168 at the end of FY22, and this has already increased to 175 in the first half of FY23.

In FY21 the market gave us a clear message that it was time to build a new digital industry ratings currency, and in FY22 significant resources from the IAB and members organisations were committed to work with the appointed sole preferred supplier, Ipsos, to build an audience measurement service that is not only suitable for the range of digital content and devices, but a currency that has been designed to work in a cross-media measurement environment.

Bringing together different areas of the industry has always been a key strength of the IAB, and in FY22 the importance of having technical experts work collaboratively with policy people within our member organisations as well as with government really shone through. From aligning on an industry position in relation to privacy law reform that works for both consumers and business through to working with agencies, marketers and the ACCC to find solutions to improving transparency in market. As the size and influence of our industry continues to expand, the IAB will be continuing to find ways to help the market operate efficiently, effectively, and responsibly.



The resources produced by the IAB are truly a collaborative effort with our councils, working groups and members with the value of the resources evident in the number of downloads, podcast listens, video views and content embedded in other resources in commercial and educational environments.

Over the last year it has been so delightful to be back with live events and spending time with our amazing IAB community. FY23 will see IAB Australia back with a full roster of events, continue to develop training resources as well as establish work streams for retail media and importantly sustainability. I would like to thank the IAB team, board, councils, members, and partners for all their support and collaboration throughout FY22 and into FY23.



gai le roy
ceo
iab australia

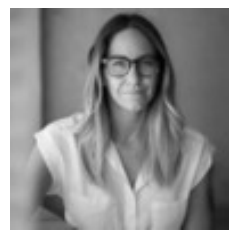
iab australia board.



nicole bence
network digital sales director
seven network | iab chair



rhys williams
managing director, large
customer sales
google anz



naomi shepherd
group industry director
facebook



mason rook
commercial director
guardian australia



paul bates
national sales director media
rea group



davor vilusic
commercial director: media
carsales



matt rowley
ceo
pedestrian group



suzie cardwell
gm data and ad product solutions
news corp australia



Paul Sigaloff
managing director
yahoo



angus keene
managing director
twitter australia



gai le roy
ceo
iab australia

iab structure and team.

iab board



iab councils



working groups:

affiliate marketing | gaming | dooh | talent & careers

iab australia team.



gai le roy
ceo



jonas jaanimagi
technology lead



natalie stanbury
director of research



sarah waladan
director of policy &
regulatory affairs



jenn thomas
head of marketing &
membership



tiffany hill
events &
office manager



liz eades
director of learning
& development



lorenza mallia
content &
design manager

increasing knowledge
strengthening connections
building confidence

iab.
australia

**about iab
australia.**

The Interactive Advertising Bureau (IAB) Limited is a registered not-for-profit organisation; membership fees and revenue generated is invested back into the IAB's membership benefits such as research, resources, events, reporting, and industry representation. IAB Australia is the peak trade association for online advertising in Australia.

As one of 47 IAB offices globally and with a rapidly growing membership, the role of the IAB is to support sustainable and diverse investment in digital advertising across all platforms in Australia.

The IAB Industry Charter details the organisation's focus on helping marketers and agencies involved in digital advertising by: Demonstrating to marketers and agencies the many ways digital advertising can deliver on business objectives.

Ensuring the necessary standards and guidelines are in place to promote a trusted and transparent digital marketplace, reduce the friction within the digital supply chain and to improve the online advertising experience for consumers, advertisers, and publishers.

To achieve these goals, IAB Australia produces content in the form of standards and guidelines, best practice handbooks, and research and resources to clarify and improve digital ad effectiveness and strengthen the supply chain. We also invest significant time and resources in the management of a sole and preferred supplier deed for digital audience measurement, delivering a world-class digital measurement solution for the digital advertising industry.

IAB purpose

"grow sustainable & diverse investment in digital advertising in australia"

what

- Digital effectiveness
 - Content and ad measurement (digital & cross media)
-
- Standards & guidelines
 - Data & data privacy
 - Digital value chain

how

Demonstrating to marketers & agencies how digital advertising delivers on their business objectives

Ensuring there are standards & solutions in place that

- drive trust & transparency
- reduce friction associated with the digital ad supply chain
- improve ad experiences for consumers, advertisers & publishers

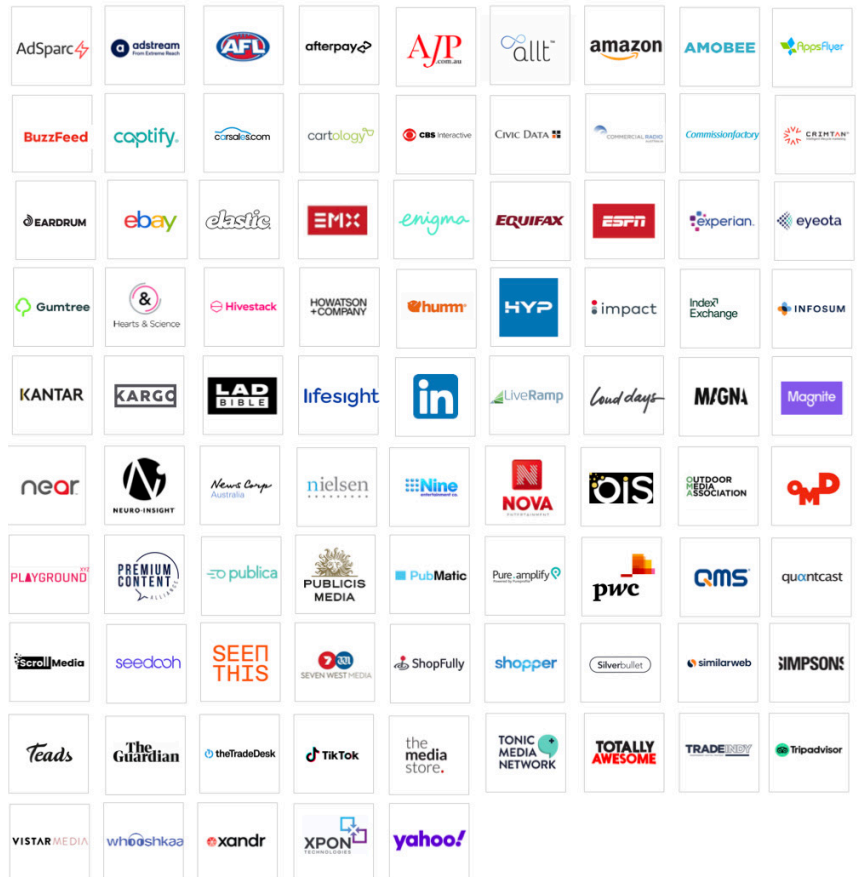
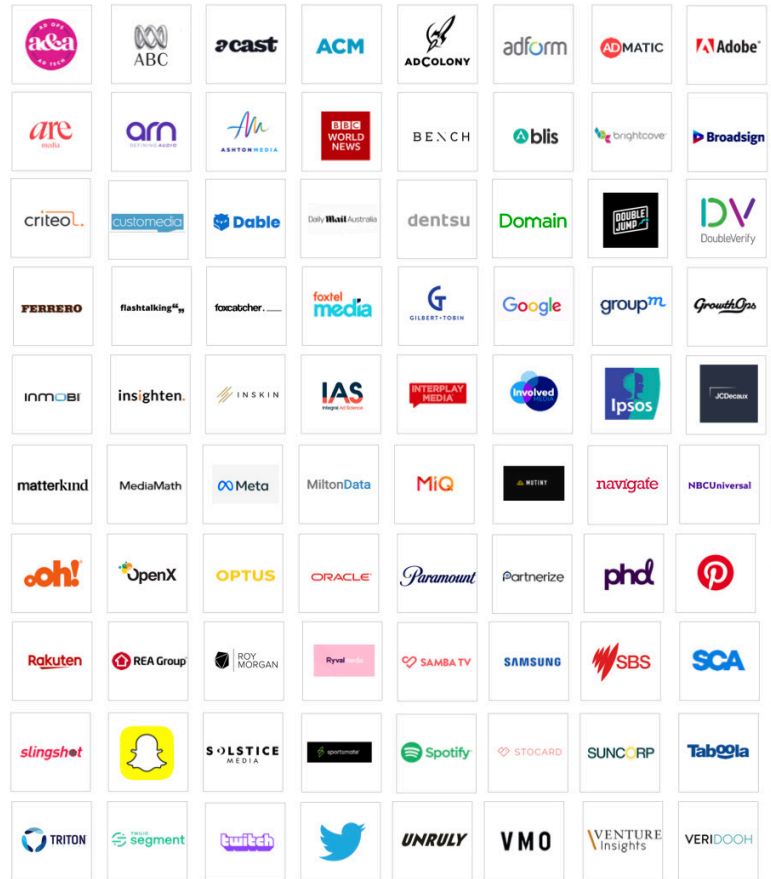
FY22 Priorities

digital driving long term brand & business growth
increasing confidence in digital supply chain
data governance & consumer privacy - education and guidance
evolution of targeting, measurement & attribution
talent – development & training

members.

FY21 > **FY22**
148 **168**

member organisations
 from all sides of the media & advertising industry. This is the largest number of financial organisations in the history of IAB Australia.



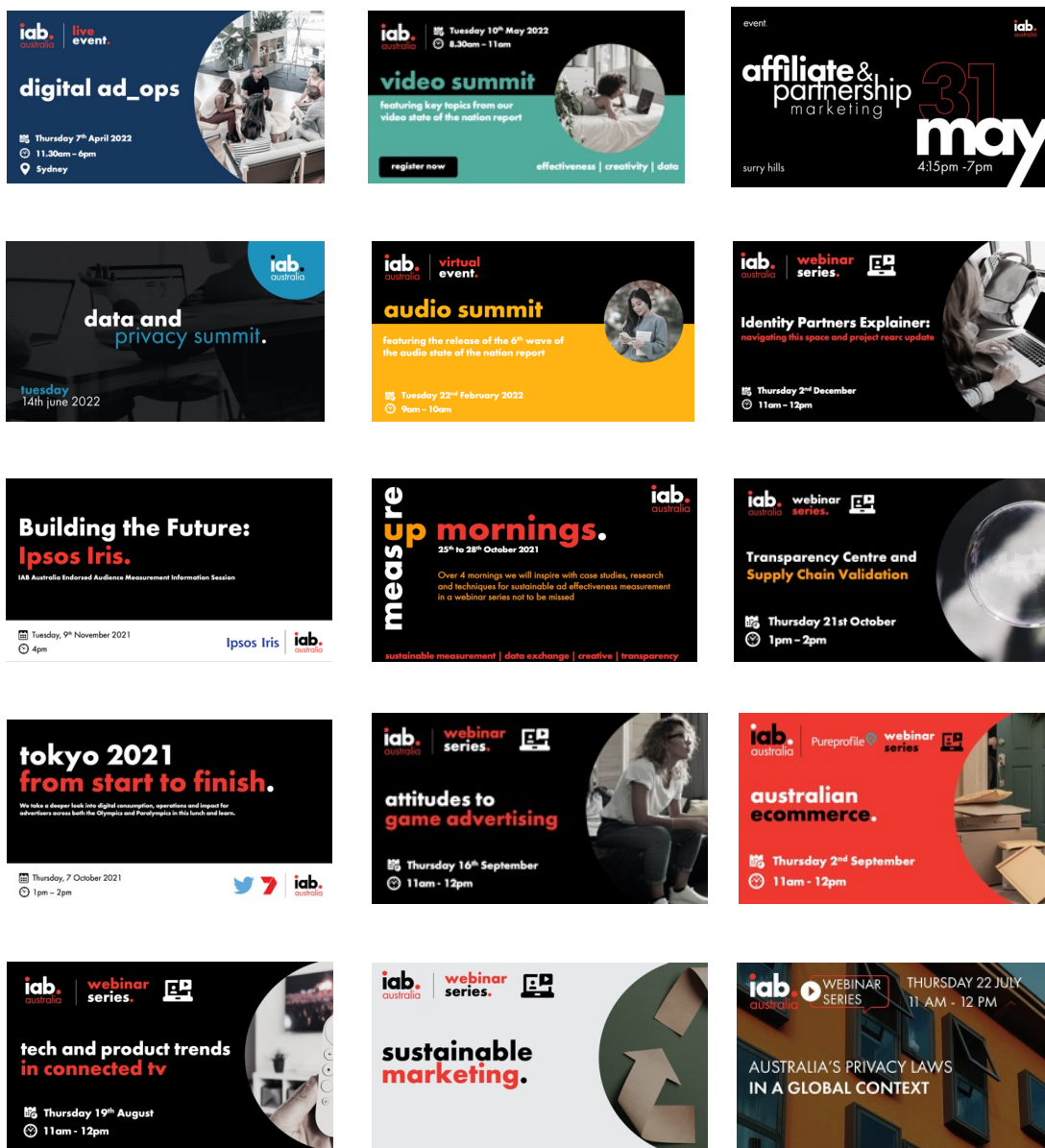
new members early FY23



**events &
webinars.**

Events and community engagement activities are a huge part of the value that the IAB brings to the media and marketing industry in Australia. These events not only educate and challenge the industry but provide support, networking and help introduce new voices and ideas into the market.

FY22 saw the IAB team deliver a mix of webinars and live events (dependent on COVID lockdowns) with over fifteen thousand webinar views and six hundred event attendees. A full roster of live events will occur during FY23.



**market
revenue.**

Online advertising expenditure was \$13.9 billion in the twelve months ended 30 June 2022, representing growth of 22% on FY21. Of this, 44% was attributed to Search and Directories, 39% to General Display and the remaining 17% to Classifieds.

\$13.9 billion total Australian online advertising market fy22

IAB continues to work with PwC to produce the most accurate reporting on Australian investment in digital advertising.



General display

\$5.4bn

+21.8% on FY21

General display advertising growth tracks steadily against the overall market



Classifieds

\$2.4bn

+30.1% on FY21

Recruitment outperforms the overall classified market



Search and directories

\$6.1bn

+19.1% on FY21

Search and directories records double digit growth for second consecutive financial year



Mobile

\$7.1bn

+15.6% on FY21

Composition of mobile advertising spend holds steady on prior financial year



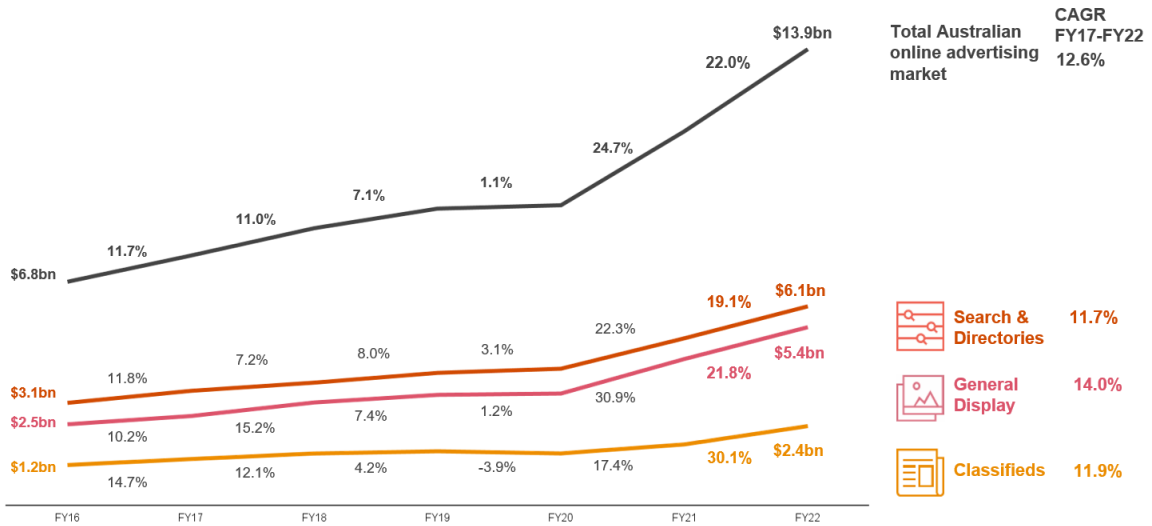
Video

\$3.1bn

+30.7% on FY21

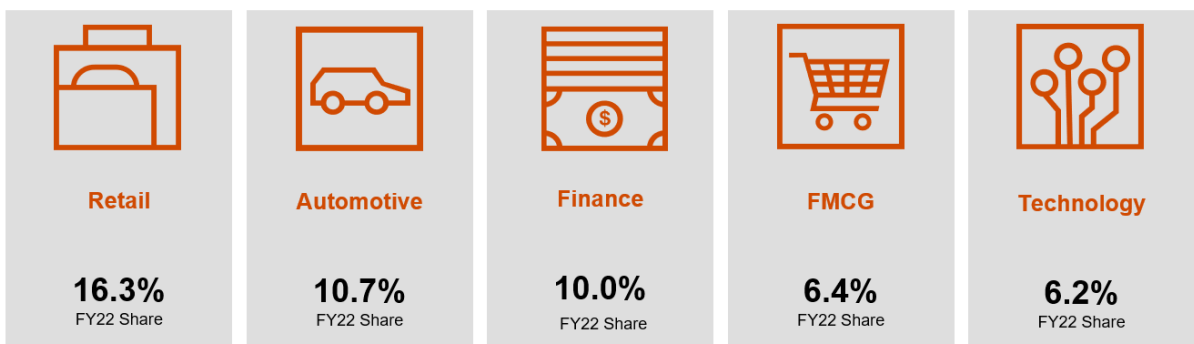
Video peaks to represent 58% of general display advertising in FY22

Online advertising expenditure by category over time (\$ billion)



top 5 advertiser categories fy22

– display advertising



fy22 content & major releases



resource
downloads

38K



video
watch time

1.4K hrs



social
followers

14K



newsletter
subscribers

**fy22
6.9K**



podcast
listens

5K

**pr &
communication.**



Representing the digital ad industry and members in market remains an important role of the IAB in Australia, trade media coverage remained high in FY22 with over 1,100 articles (up from 800 in FY21) and the share of voice of trade associations and measurement currency bodies was an impressive 38%.

This consistent stream of information and education in the media continues to reinforce the benefits of digital advertising, ways to improve the ecosystems as well as the implications of that for increasing marketing opportunities and the broader national business economy.

The IAB directly communicates with nearly 7,000 industry professionals via our weekly newsletter provide industry updates and information on IAB initiatives as well as events.

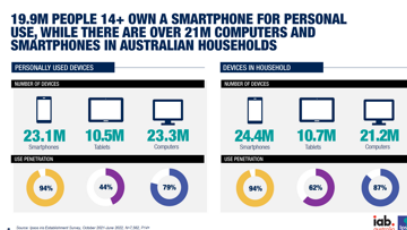
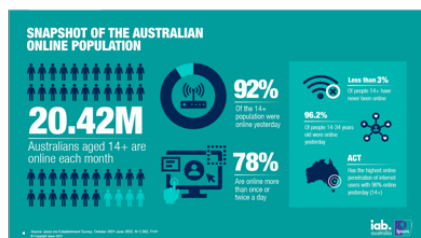
measurement.

ratings

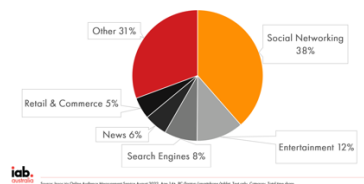
Ipsos was appointed the IAB preferred supplier for industry content audience ratings at the beginning of September 2021. The remainder of FY22 saw Ipsos recruit a media quality panel of PCs, mobile and tablet consumers along with working with the industry on tagging websites, installing SDKs into apps and developing rules and guidelines for the currency. The IAB Measurement Council, with representatives across the industry, is working to ensure the new currency will provide the market with a high-quality independent ratings product providing comparable audience data across all websites and apps used by Australian internet users.



media consumption



digital media consumption – time spent.



ad effectiveness

Our Ad Effectiveness Council as well as our more technically focussed Councils have been busy providing the market with tools, information and resources to ensure that marketers can accurately assess their digital ad investments. In FY22 the Council launched a free e-learning program providing a thorough outline of the principles of ad effectiveness measurement as well as the most common techniques used in market and emerging approaches.

**standards and
development.**

The IAB locally and through IAB Tech Lab remains at the centre of the development, implementation and education of important industry technical standards. Throughout FY22 and into the beginning of FY23 there have been a number of major releases as well as ongoing projects to help improve the efficiency and effectiveness of digital advertising across all devices.

advanced tv roadmap

- Create the structure for streamlined and normalised reconciliation of TV buys across CTV, linear, and broadcast environments
- Establish a common technical framework for audience interoperability, universal addressability, and cross-environment frequency capping
- Develop open-source, auditable measurability for tracking ad creative across all platforms with anti-fraud measures included
- Standardise the foundation for an impression-based TV market and universal ad break management



seller defined audiences

- Privacy-by-design specifications enable both contextual signals and 1st Party audience segments
- Segments are safely defined, labelled, scaled and monetised by leveraging anonymous taxonomy IDs

openrtb 2.6 programmatic protocols

- New attributes and guides for buying and selling Ad Pods
- New objects to describe Channel & Network of content
- Improved Header Bidding Support



privacy and policy.

As the digital advertising industry continues to grow and expand there is increasing industry and government examination on a range of policy areas. In FY22 the IAB re-established a dedicated policy function with the appointment of Sarah Waladan (Director of Policy and Regulatory Affairs) to help represent the industry, work with Government and develop policy positions that will our industry to thrive.

Privacy

In January 2022, IAB Australia released the digital advertising submission in relation to the Attorney-General's Department's Privacy Act Review Discussion Paper (Discussion Paper). Throughout the year the IAB continued to provide member companies with an understanding of both current privacy laws, overseas reforms and upcoming Australian reforms. IAB Australia will continue working on these issues and talking to Government to try to ensure we are having an honest and balanced conversation about the law as it stands now and how we can build a better privacy framework going forward.

Transparency

Alongside the ongoing work that IAB Australia, with the support of IAB Tech Lab, undertakes developing industry standards to improve operational efficiency across the supply chain, the IAB has been working with the Australian Association of National Advertisers (AANA) and the Media Federation of Australia (MFA) to identify ways to address concerns raised in the ACCC's Advertising Services Inquiry report published in September 2021.

The ACCC's detailed Digital Advertising Services Inquiry Report provided analysis on efficiency in the supply of ad tech services and has implications for many aspects of the digital advertising sector. The IAB is working on behalf of the industry with Government as well as other industry bodies on the key issues it raises in relation to ad tech fees and programmatic transparency.

Cross industry technical and regulatory working groups are developing detailed proposals and assessing new approaches to meet both the expectations of Government as well as key stakeholders across the industry.



**talent and
careers.**

Significant investment was made in talent and training initiatives in FY22 to help the industry attract new talent, enhance capabilities of people within our industry through a range of new training programs. **A new executive, Liz Eades, was hired in early 2022 to lead these programs.**

IAB Australia mentorship program

The mentorship program, running since 2019, is one of the most important industry initiatives that has been established by the IAB Executive Technology Council to support our emerging leaders.

To date 262 people with less than ten years industry experience have benefitted from this six-month long program where they are matched and mentored by a senior industry leader outside of their own organisation.



Digital Advertising & Ad Tech Industry Talent Census

The severe talent shortage in 2021 prompted the establishment of an annual industry talent census with data on staff composition, vacancy rates, HR policies and training needs being collected from the IAB member base.

The industry vacancy rate rose from 9.8% to 11.8% in 2022 versus 2021 though there has been wave of redundancies in the first half of FY23 that will have tempered this rate.



Micro-credentials Partnership with Deakin University

After an extensive review of local industry training needs, IAB has partnered with Deakin University deliver a series of co-designed micro-credentials for people with a digital advertising career looking to upskill or those looking to change roles.

The accredited postgraduate stackable short courses offer 75 hours of self-paced learning that can be completed in as little as six weeks or as long as six months. The first course launched is Programmatic Advertising and Trading which will be followed by Ad Operations launched in early 2023.



Free e-learning courses

There have been over 800 enrolments for the four IAB Australia e-learning courses since the launch of the first program in 2020. A number of new e-learning programs will be rolled out in 2023 including streaming audio and programmatic DOOH.



iab councils & working groups.

IAB Councils and Working Groups comprise of representatives from across the industry to drive vital initiatives and education for the market. These forums also provide an important environment for industry discussion and sharing of best practices.



purpose

Provide insight, leadership & guidance with a particular focus on the digital value chain. Working in a collaborative manner with other councils & providing a strategic view of IAB focus areas.

FY22 Initiatives:

- Mentorship Program
- Review of sustainability measures needed for digital advertising industry
- Response to the ACCC Digital Ad Services Inquiry



purpose

Identify standards and guidelines both nationally and internationally, evaluate the needs of the local advertising industry, establish a program of work to produce and promote standards and guidelines for the Australian online advertising industry.

FY22 Initiatives:

- AdOps Conferences – curation and co-ordination
- Review and promotion of IAB Tech Lab standards and initiatives in market



purpose

Drive and monitor standards for measuring digital audiences and content ratings in Australia.

FY22 Initiatives:

- Working with Ipsos to develop new digital audience measurement ratings system for the local market with new measurement partner, Ipsos
- Device Ownership & Trends reports



purpose

Educating the industry on assessing digital advertising activity; highlighting ways of making more effective digital investments.

FY22 Initiatives:

- Launch of Ad Effectiveness free e-learning program
- Ad attention market survey and landscape review for Ad Attention LandscapeReport released in FY23



purpose

Aims to empower the Australian market to make the most of the opportunities in video advertising by providing education, inspiration & technical standards. Build trust and transparency in the industry & support the market growth.

FY22 Initiatives:

- Video Advertising Summit
- Creativity in Video Report and Showcase
- CTV Technical Annex Report
- Video Advertising State of the Nation Report



purpose

Define standards for digital Data of all types and support the industry via best practices related to its management, interrogation and usage/execution.

FY22 Initiatives:

- Data and Privacy Summit
- First Party Data Handbook
- Identifiers Handbook



purpose

Educate & evangelise the power & true value of audio to the advertising industry. Develop research, guidelines & standards in audio advertising & drive revenue.

FY22 Initiatives:

- Audio Summit
- Audio State of the Nation Research
- Creative Showcase & Case Studies

working groups.

dooh working group

purpose

Established to support the growing DOOH industry, assist with standards, education and healthy development of DOOH, particularly programmatic DOOH.

FY22 initiatives:

- DOOH Buyers Guide
- Attitudes to DOOH Advertising

affiliate working group

purpose

To provide the market with information about the Affiliate and Partnerships industry

FY22 initiatives:

- Affiliate Industry Review
- Affiliate and Partnership Marketing Event
- Affiliate and Partnership Marketing Fundamentals e-learning Program

game advertising working group

purpose

Support the growth of game advertising in the Australian market and provide education and inspiration on the opportunities available. .

FY22 initiatives:

- Game Advertising Summit
- Game Advertising Handbook

talent & careers working group

purpose

Reviewing needs to attract, retain and support talent in our industry

FY22 initiatives:

- Advisory role for IAB / Deakin Micro-credentials training development
- Industry Talent Census review and related articles supporting people in the industry



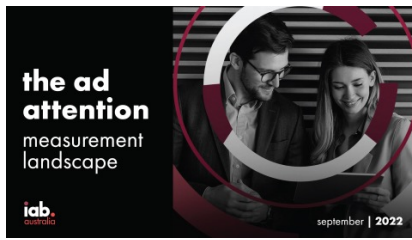
MARGARET STREET
LEFT LANES

M3 PACIFIC MWY
Sunshine Coast
Toowong

TURBOT STREET

CLEARANCE 5.0m

**major releases
early fy23.**



**major iab
and industry
priorities fy23.**

priorities fy23

While the Government has introduced new penalties and changes to the notifiable data breach regime off the back of a number of high-profile data breaches in late 2022, however details on the broader privacy act review had not been released by the Attorney General at the time of publication of this report but are due by the end of CY22.

Throughout 2023 the IAB and digital marketing industry will be focused on preparing both regulatory changes as well as continuing to address changes by browser and operating systems in relation to signals and digital identifiers.

sustainability

As the industry and wider society become increasingly aware of the climate crisis, and the impact that the internet and digital ads have on the environment, it has now become more important than ever to take responsibility and action. IAB Australia has established a working group that will be focusing on industry standards and best practice in relation to measuring, managing and reducing carbon emissions generated by the digital advertising industry.

training

As well as embedding the two IAB / Deakin University micro-credentials (programmatic advertising and ad operations) in the market, IAB Australia will continue to roll out training programmes to suit the needs of our industry, this will include a range of free and paid e-learning programmes as well in-house workshops. Ensuring we have great talent with the latest skills is vital for our ecosystem to thrive.

transparency

Transparency and improving the efficiency and effectiveness of our industry has always been at the heart of IAB activities, in 2023 we will see a range of new standards in market to improve transparency as well as industry self-regulatory measures to address transparency issues raised in the ACCC Advertising Services Inquiry. This work will continue to be carried out alongside our MFA and AANA industry partners.

ratings

FY23 will see the launch of the new Ipsos iris, overseen by IAB Australia, as the industry's exclusive and preferred supplier for the planning, buying, and reporting of digital audience measurement data in Australia. Ipsos iris will allow media owners to reassert their value proposition and prove greater differentiation and provide agencies and advertisers a trusted independent foundation to make evidence-based media decisions. As well as ratings for websites and apps on PCs, smartphones and tablets, there will be data from OzTam and YouTube to help report on the CTV market.

retail media

With the development and expansion of retail media in the digital advertising market, IAB Australia is establishing a working group across members to assess standards, measurement, share case studies, research and find ways to assess ad effectiveness.

events planned for 2023.

Event	Date	State
Audio Summit	Wednesday 1 st March	NSW
Audio Summit	Tuesday 7 th March	VIC
pDOOH Event	Thursday 30 th March	NSW
Affiliate Marketing Event	Thursday 6 th April	NSW
Data & Privacy Summit	May 2023	NSW
Digital AdOps	May 2023	NSW
Video Summit	June 2023	NSW
Game Advertising Summit	July 2023	NSW
Brisbane Market Update	August 2023	QLD
MeasureUp	Wednesday 20 th September	NSW
Digital AdOps	Tuesday 21 st November	VIC
End of Year Celebration	Wednesday 6 th December	NSW
End of Year Celebration	Wednesday 13 th December	VIC

for more information go to:
iabaustralia.com.au