

## iab board



## iab councils



## working groups:

affiliate marketing | gaming | dooh | talent & careers

## IAB purpose

# “grow sustainable & diverse investment in digital advertising in australia”

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### 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

### CY23 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



# buy-side usage and attitudes to digital advertising

**natalie stanbury**  
director of research  
**iab australia**





**\$ 13.9 billion**

Total online advertising market financial year 2022

**+22.0%**

Online advertising market growth financial year 2022 vs 2021



**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



- Consideration for **use continues to increase**
- Driven by **better targeting, extended reach, attention / engagement and brand building**
- Brand building is the dominant campaign objective
- Digital formats are being **planned and bought in combination** with each other
- Buying **programmatically** has increased over time
- High appetite for experimentation with **emerging creative formats**
- A diverse **range of data signals** are being used
- Room to improve **fit for purpose creative**
- **Measurement** is a challenge



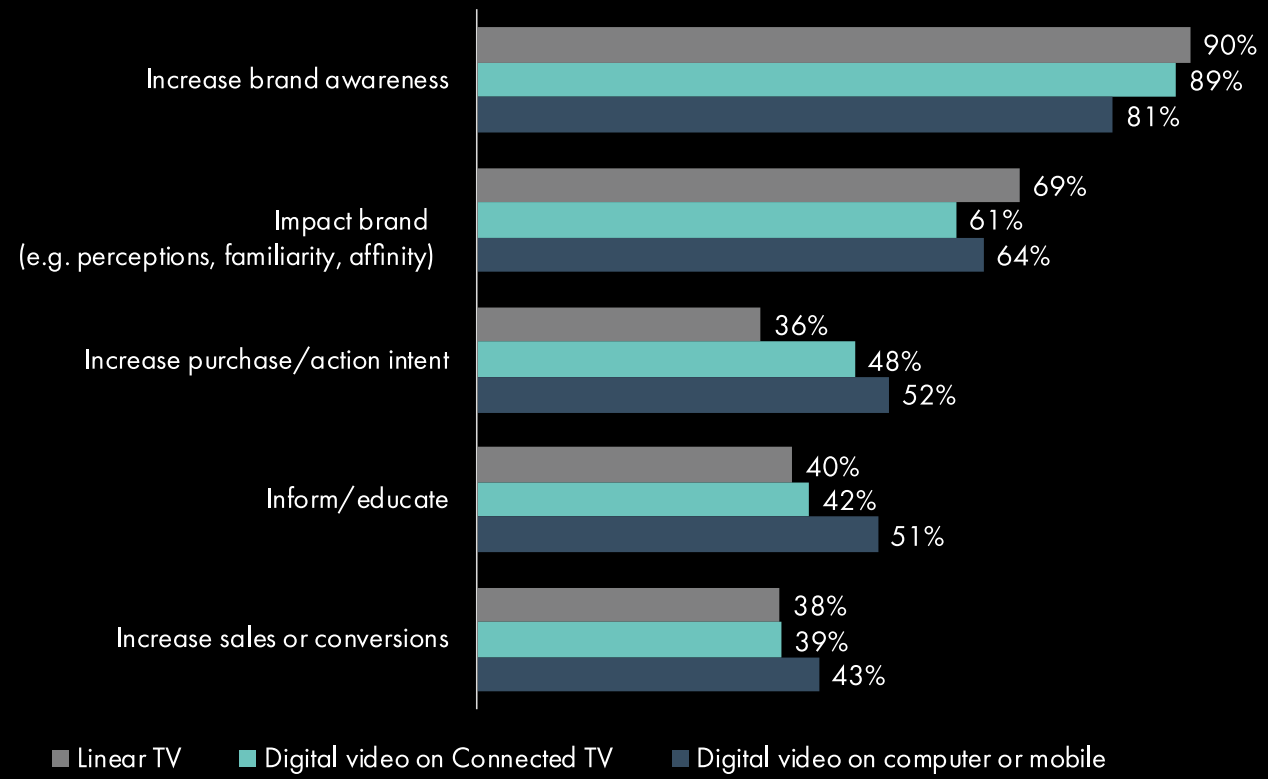
# Video Advertising: **State of the Nation** **Report**

Wave 2 | May 2022



# branding is the predominant objective for video advertising.

agency objectives for digital video advertising



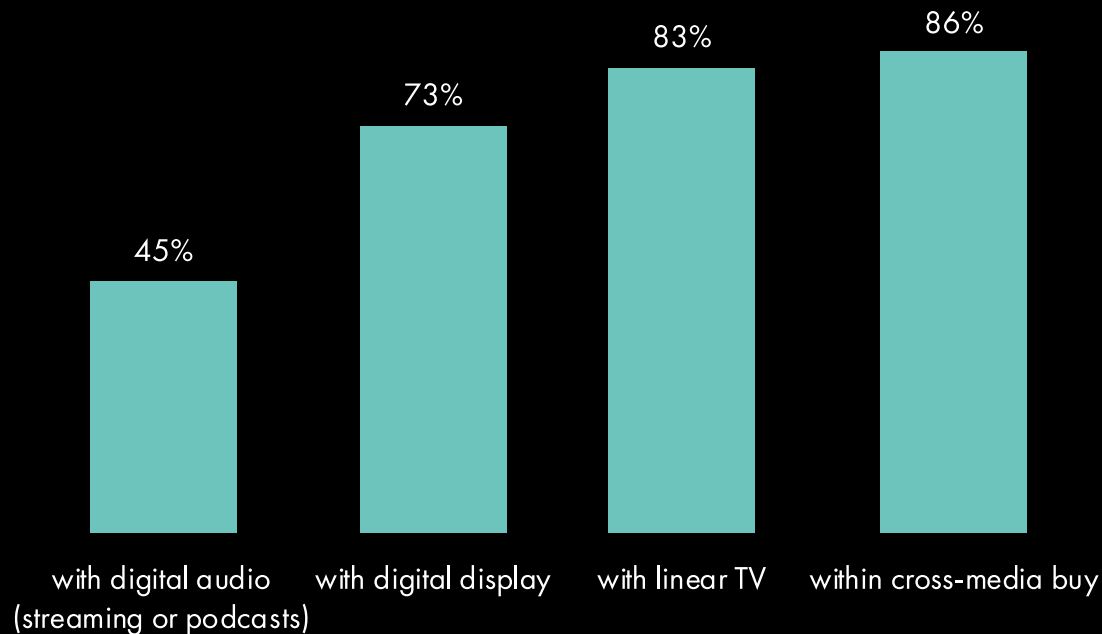
# agencies plan and buy digital video in combination with other advertising types.

**Over the  
last year**

most agencies  
have planned

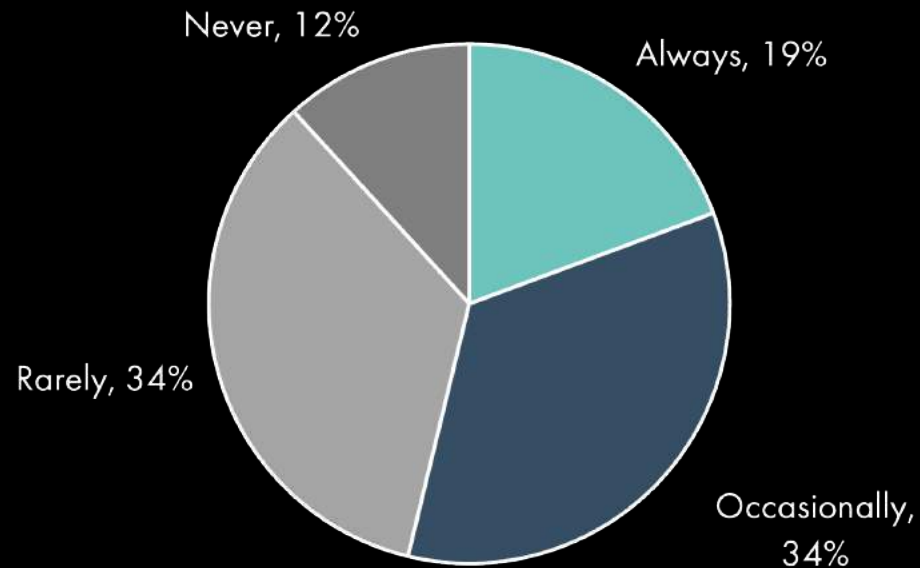
and bought digital video collaboratively in  
a cross-media buy and 8 in 10 have specifically  
just bought digital video with linear TV.

agency planning and buying digital video collaboratively  
with other advertising types

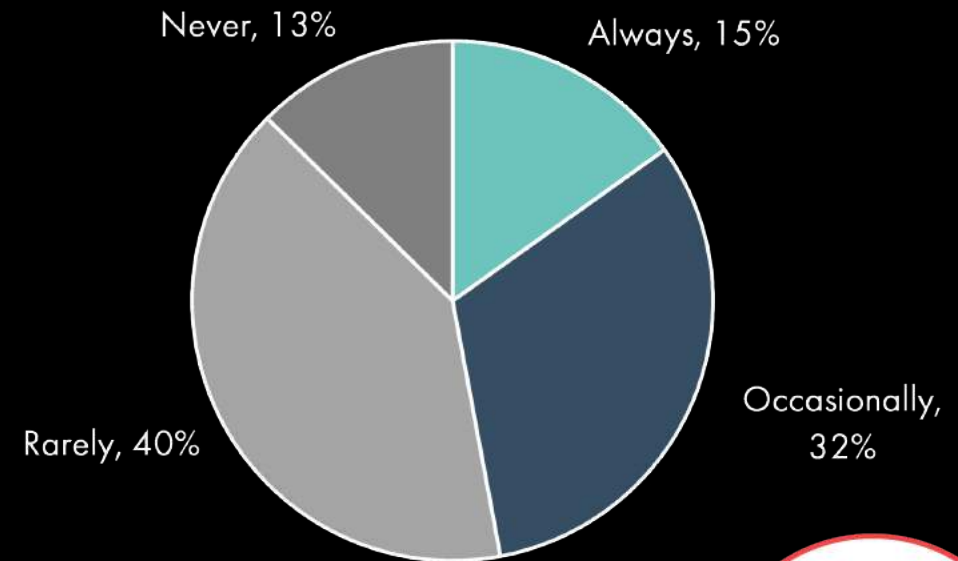


# room to improve fit for purpose creative.

## adjust creative to media environment



## adjust creative to target segments



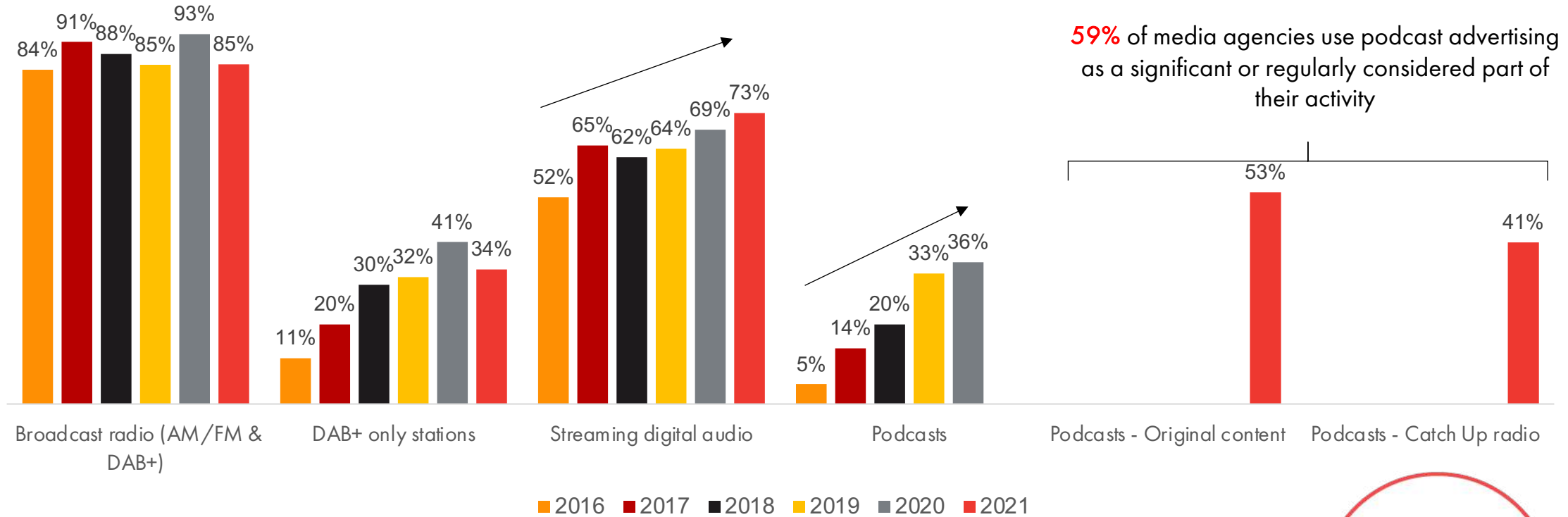
# audio advertising state of the nation

wave 6: february 2022



# agencies regularly consider audio advertising.

media agencies where audio advertising is a significant part of activity or regularly considered





# game advertising

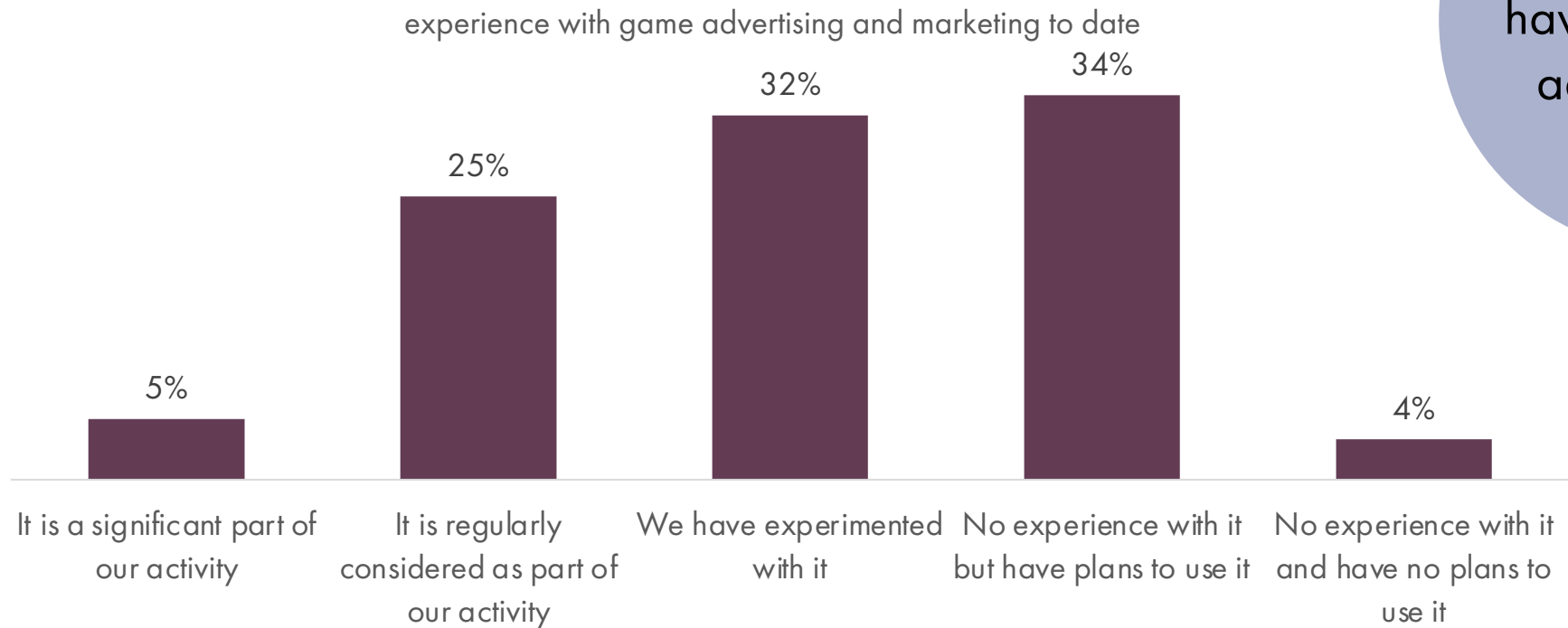
State of the Nation Report  
Wave 2 | July 2022



# experience with game advertising.

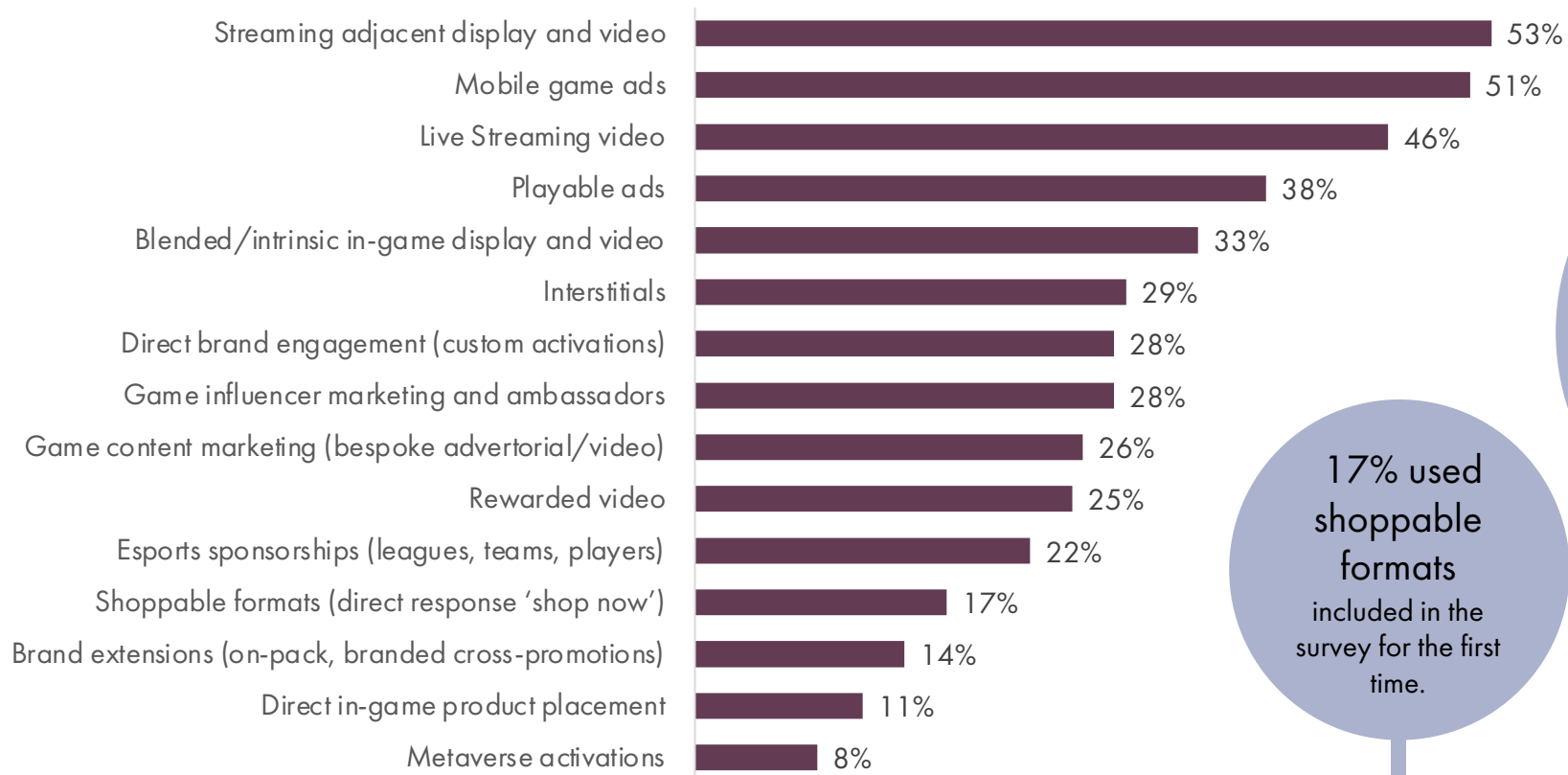
Experience with game advertising amongst mainstream advertising agencies is mostly at the experimental stage with 30% regularly considering or using it (up from 20% in 2021).

62%  
have used game  
advertising to  
date.



# formats used in game advertising.

game advertising and marketing formats used




17% used shoppable formats included in the survey for the first time.

There has been increased usage of blended/intrinsic in-game display and video (+10) and playable ads (+9) on last wave.

iab. update to  
**brisbane market**



A large, thick red circular arc that is open at the top and bottom, framing the central text.

**DOOH**

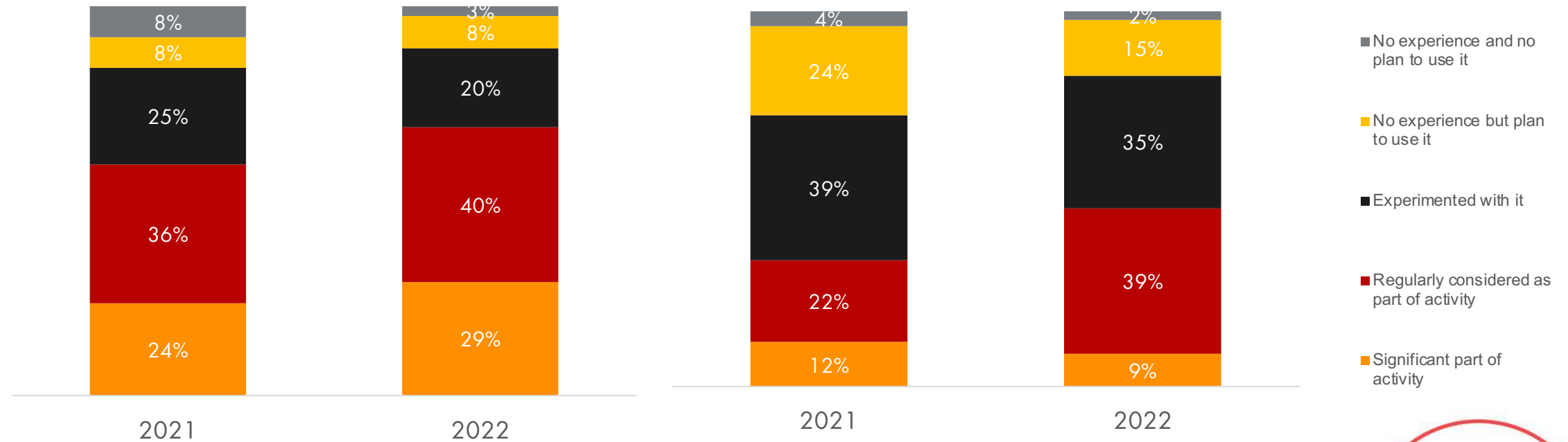
State of the nation *survey*

**iab.**  
australia

# experience with DOOH amongst agencies.

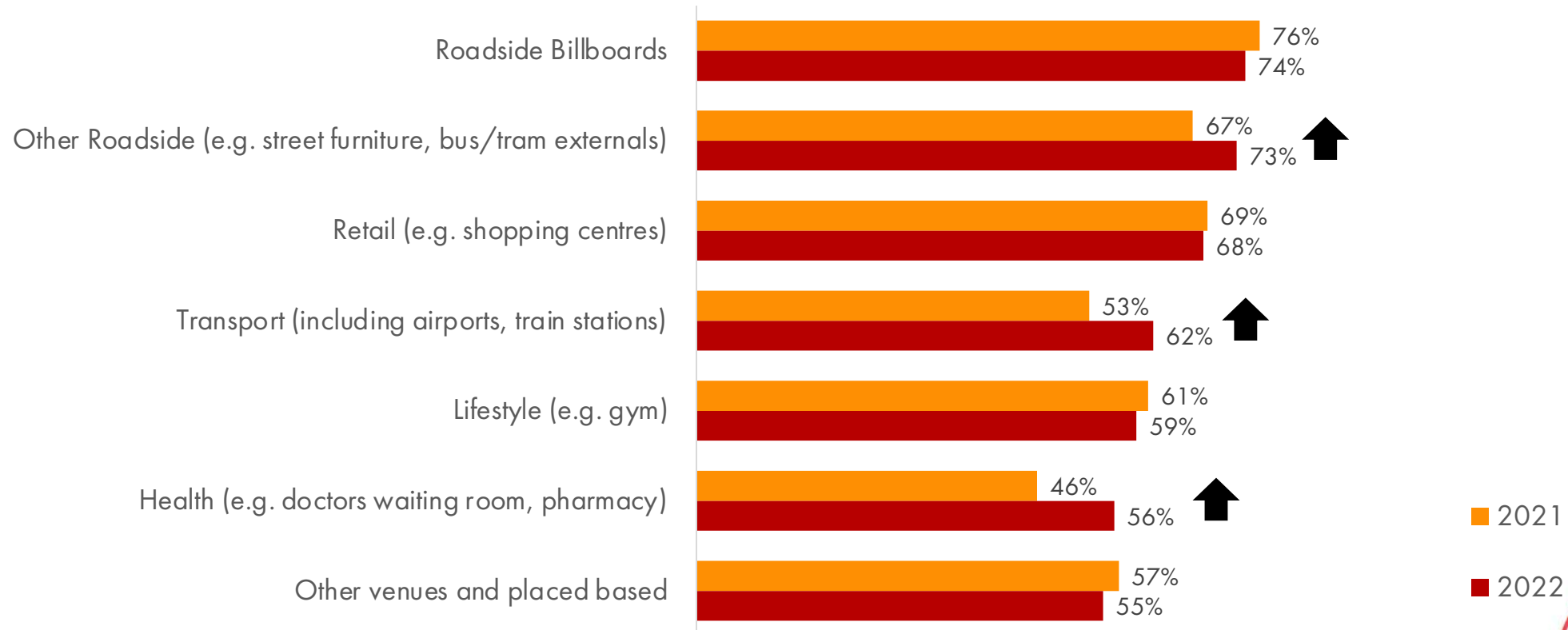
experience with digital out-of-home advertising buying via IO/direct amongst agencies

experience with digital out-of-home advertising buying programmatically amongst agencies



# usage of programmatic formats **by agencies.**

## usage of programmatic DOOH ad venues/formats **amongst agencies**



# the ad attention measurement landscape

**iab.**  
australia

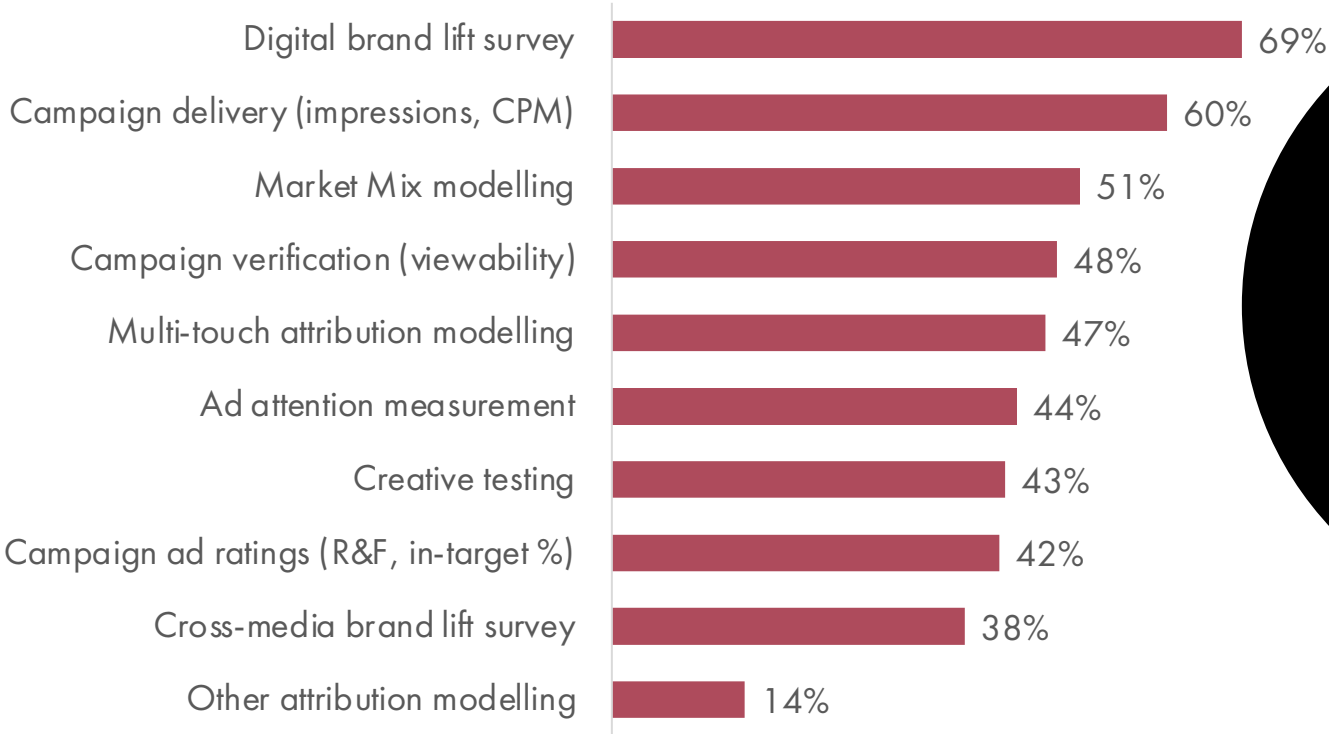
september | **2022**





# An increasing number of measurement tools.

measurement tools most important for assessing the effectiveness of digital advertising amongst all respondents

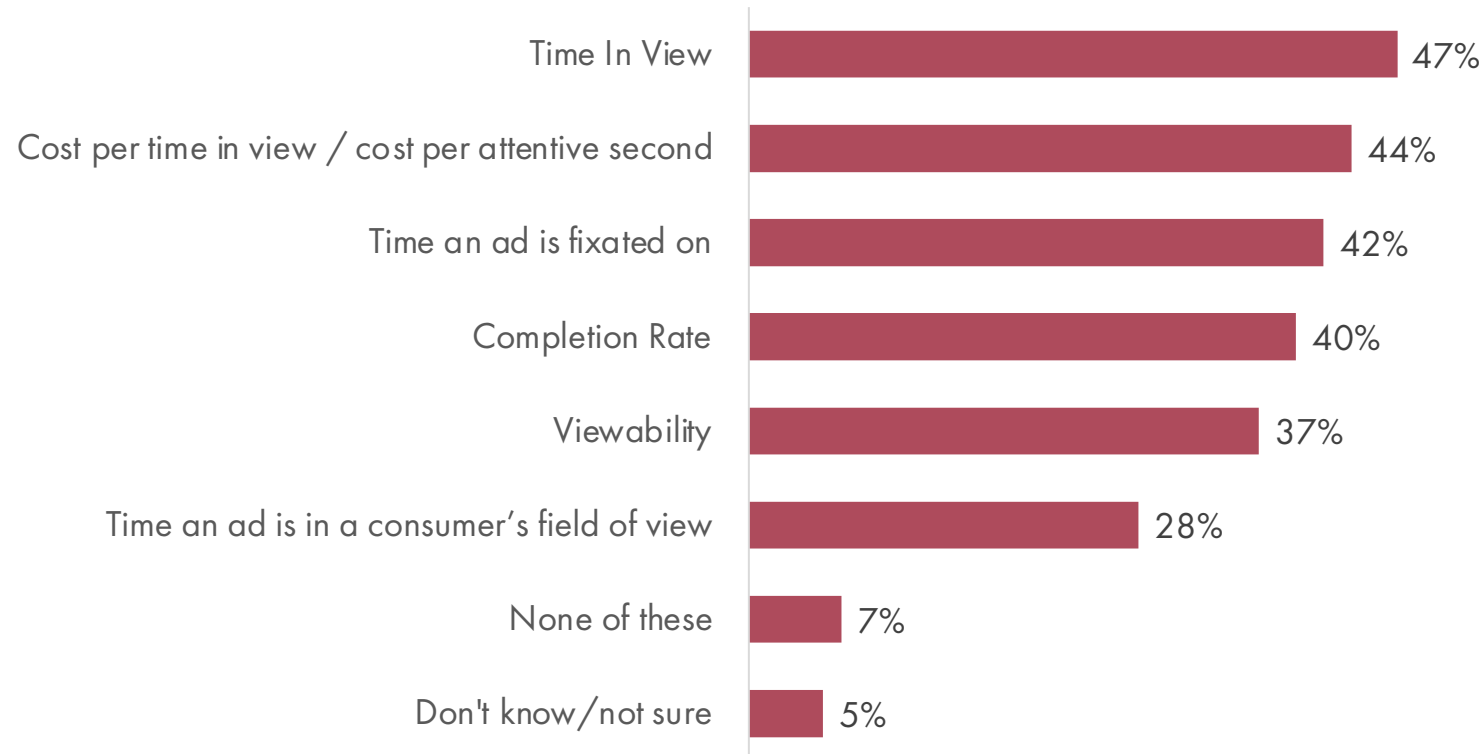


With a movement away from techniques impacted by the reduction in signals and towards sustainable measurement techniques.

44% say ad attention is an important tool for assessing effectiveness of digital advertising.

# measures of advertising attention.

## effective measures of advertising attention



A range of metrics considered as effective measures of ad attention.

# what to do.

- Continue to invest in digital advertising for long-term success, it's a **proven, cost-efficient brand builder**.
- Experiment with formats and creative to ensure you are optimizing effectiveness by producing **content that is tailored to the environment and audience**.
- **Prepare for the retirement of third-party cookies and signals reduction**, understanding the impact and adjusting planning, activating and measuring activity.
- Measure what you set out to achieve, **aligning campaign objectives with measurement**.



# signals, third-party cookies and enabling measurement

**jonas jaanimagi**  
technology lead  
iab australia



2022

# data survey

state of the nation survey

**iab.**  
australia

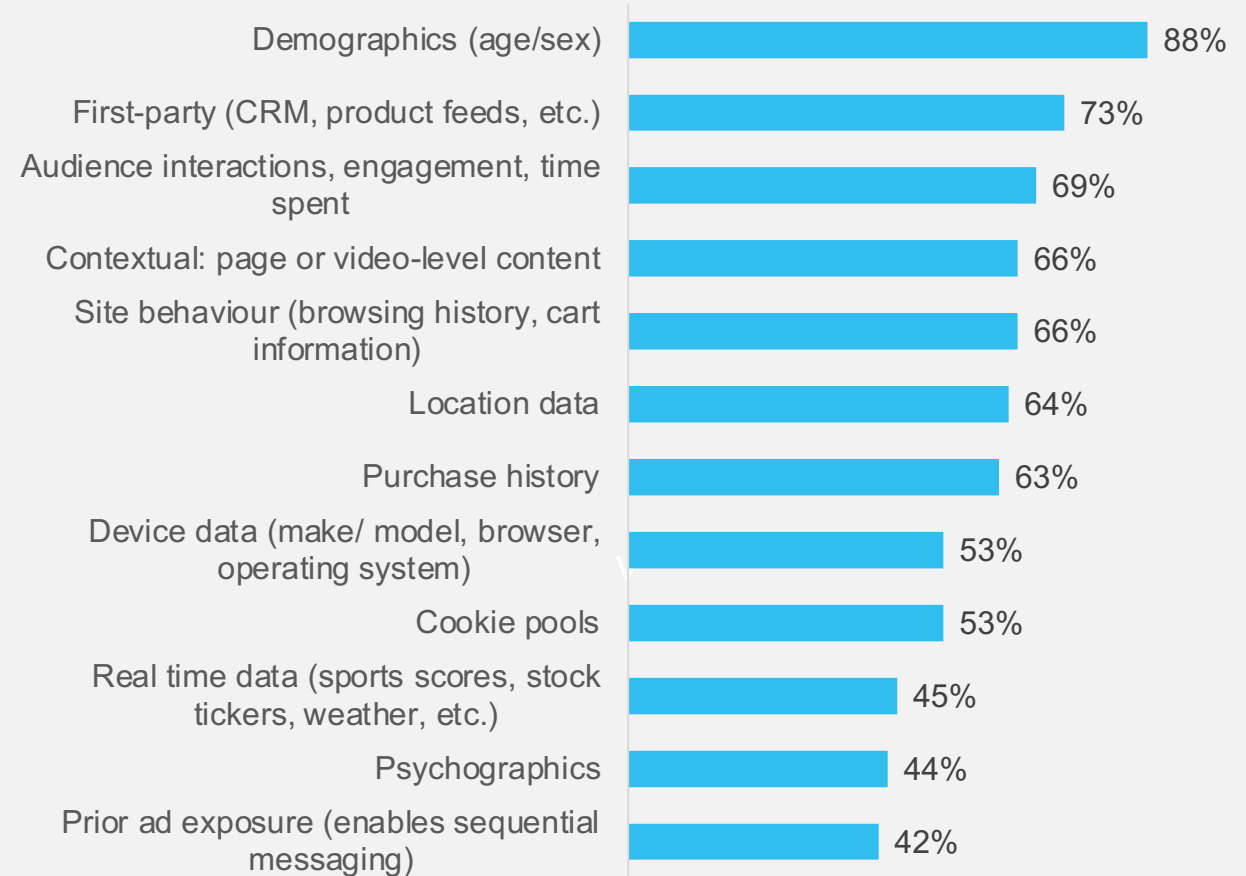
industry survey | october 2022

iab. update to  
**brisbane  
market**

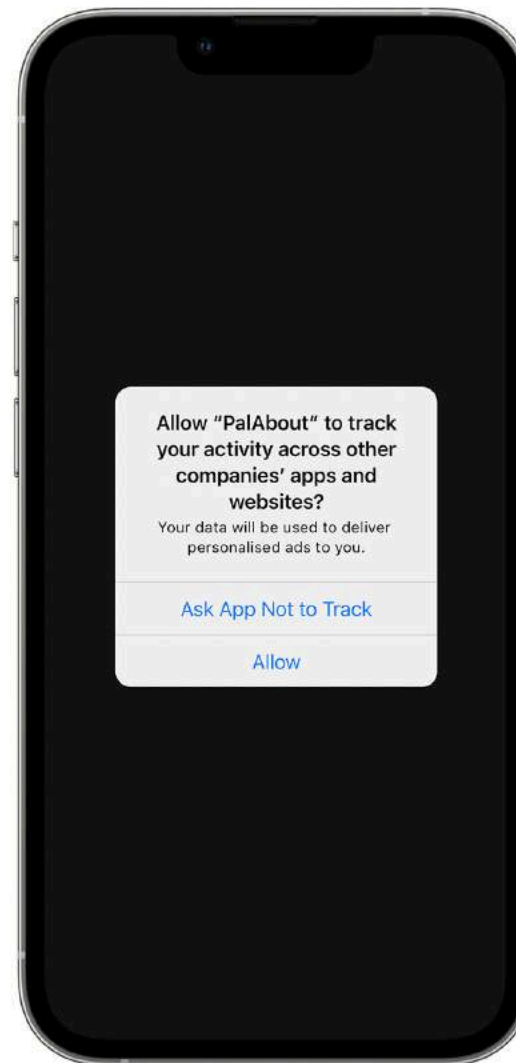
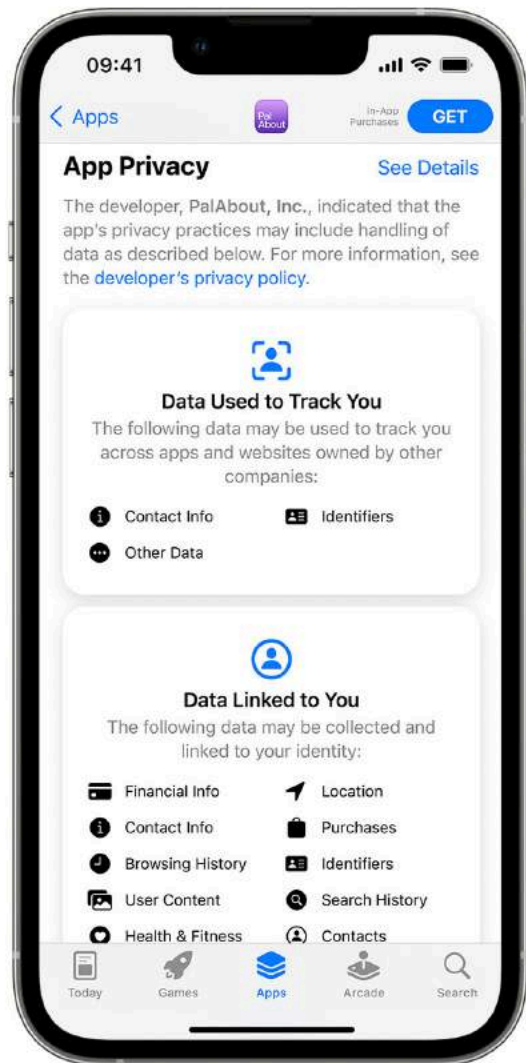
# Data signals used

A range of data signals are being used to inform targeting and creative for digital advertising.

- **Demographics are the most used data signal by 8 in 10 respondents**
- **7 in 10 respondents are using first-party data signals**







## Estimated 2022 revenue impact on Big Tech from Apple's privacy changes

COMPANY	REVENUE IMPACT (\$USD)	REVENUE IMPACT (%)
Meta	\$12.81B	9.7%
Snap	\$546.00M	9.6%
YouTube	\$2.20B	6.5%
Twitter	\$323.00M	5.4%



## SKAdNetwork 4.0 now available

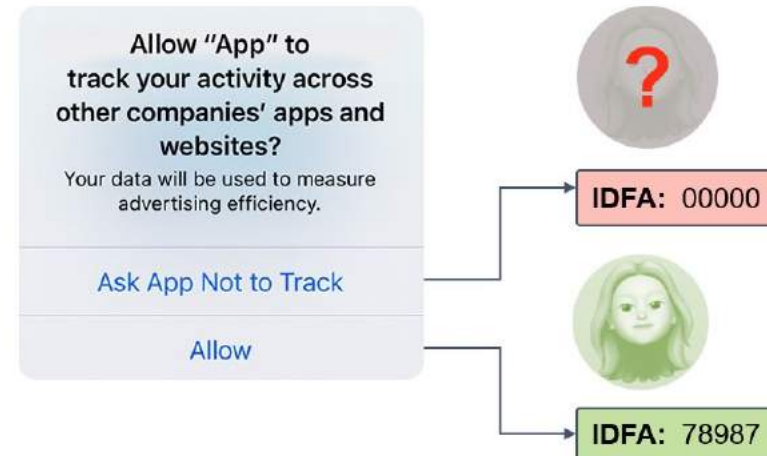
October 24, 2022



Apple's **privacy-preserving attribution framework** that provides advertisers and their partners with insights on campaign performance while respecting user wishes for privacy

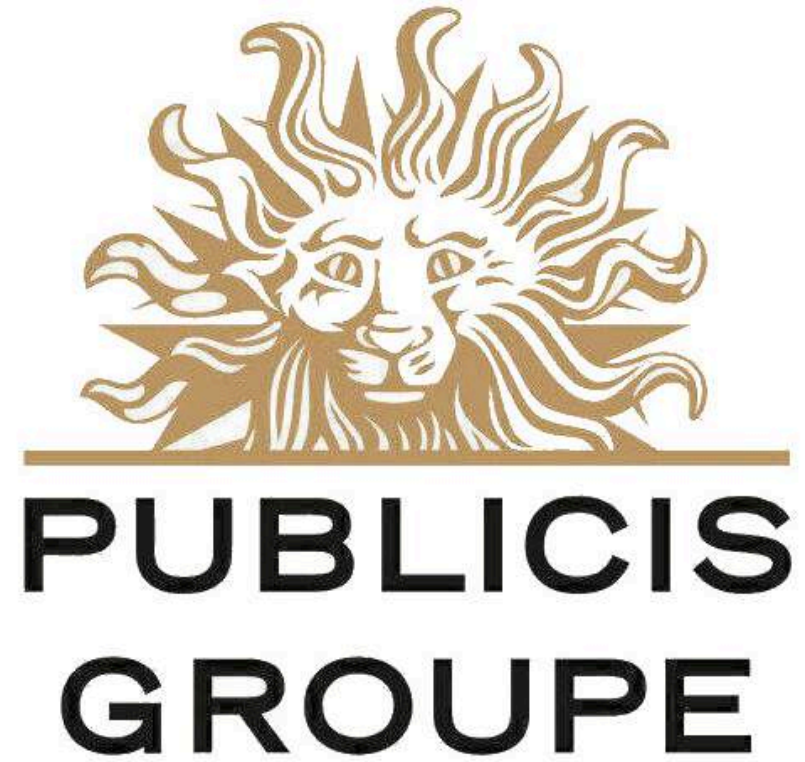
Attribution insights are provided to advertisers and their media partners via a **postback**

### App Tracking Transparency (ATT)



Feature	Description	SKAN Versions				
		v1.0 (ios11.3)	v2.0 (ios14)	v2.2 (ios14.5)	v3.0 (ios14.6)	v4.0 (ios?)
<b>Ad Network ID</b>	Parameter to identify the ad network that drove the install.	✓	✓	✓	✓	✓
<b>Transaction ID</b>	Parameter to validate that the postbacks are unique.	✓	✓	✓	✓	✓
<b>Campaign ID</b>	Parameter to identify the associated campaign.	✓	✓	✓	✓	✓
<b>App ID</b>	Parameter to identify the advertised app.	✓	✓	✓	✓	✓
<b>Conversion Value</b>	Parameter to track post-install activity.		✓	✓	✓	✓
<b>Version</b>	Parameter to identify SKAN version.		✓	✓	✓	✓
<b>Redownload</b>	Parameter to identify if it was a redownload or net-new.		✓	✓	✓	✓
<b>Source App ID</b>	Parameter to identify the app where the ad was displayed.		✓	✓	✓	✓
<b>Attribution Signature</b>	Apple's attribution signature that you verify.		✓	✓	✓	✓
<b>View-through Ad</b>	Ad type that is any interactive ad format that isn't a StoreKit rendered click.			✓	✓	✓
<b>SKAdImpression</b>	A class which records the registering of an ad impression rather than just a click.			✓	✓	✓
<b>Fidelity Type</b>	A parameter to differentiate a StoreKit rendered ad from a view-through ad.			✓	✓	✓
<b>Did Win</b>	A parameter to differentiate "winning" ad networks from "losers" with influence.				✓	✓
<b>Hierarchical Conversion Values</b>	Coarse-grain conversion value added to overcome privacy threshold.					✓
<b>Multiple Conversion Windows</b>	24 hour timer removed and 3 postbacks introduced rather than just 1.					✓
<b>Hierarchical Source Identifiers</b>	4 digits added to the Campaign ID when higher install volume is met.					✓
<b>Web-to-app Attribution</b>	Attribution for web ads to App Store advertising flow.					✓

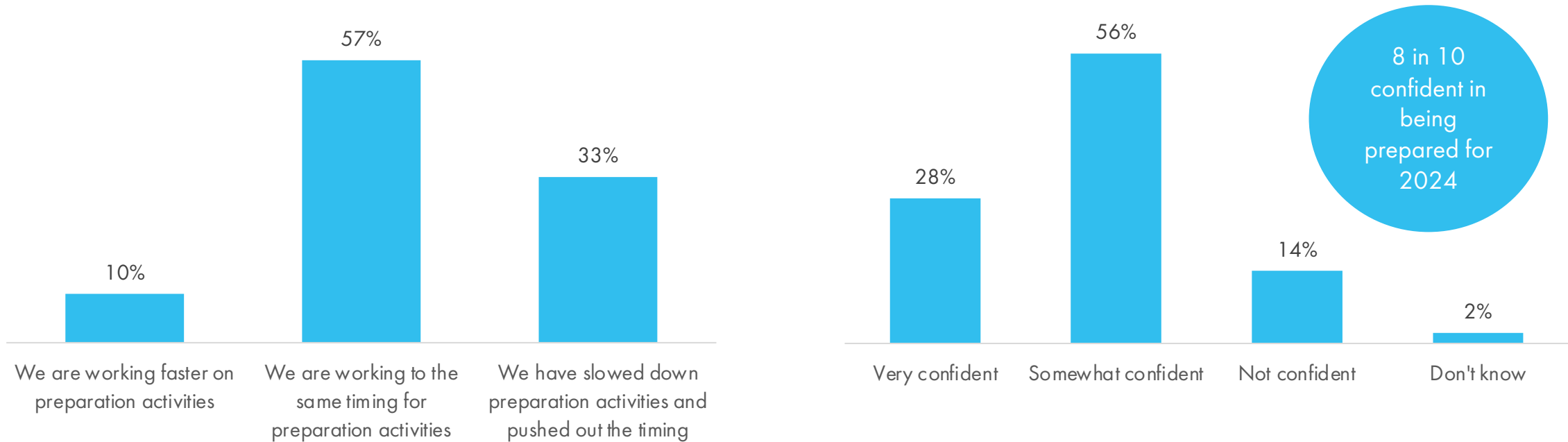






# Preparation for retirement of third-party cookies

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

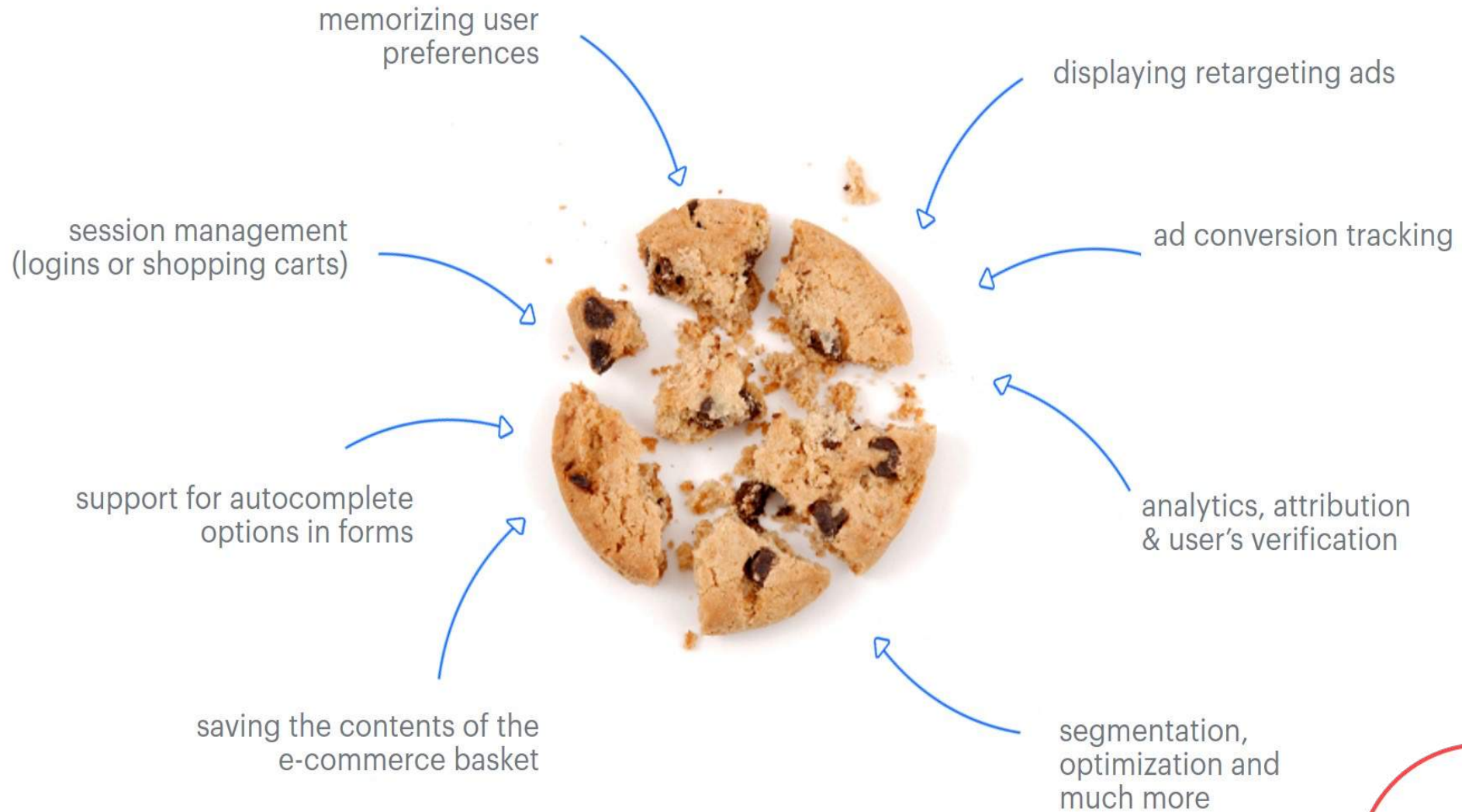


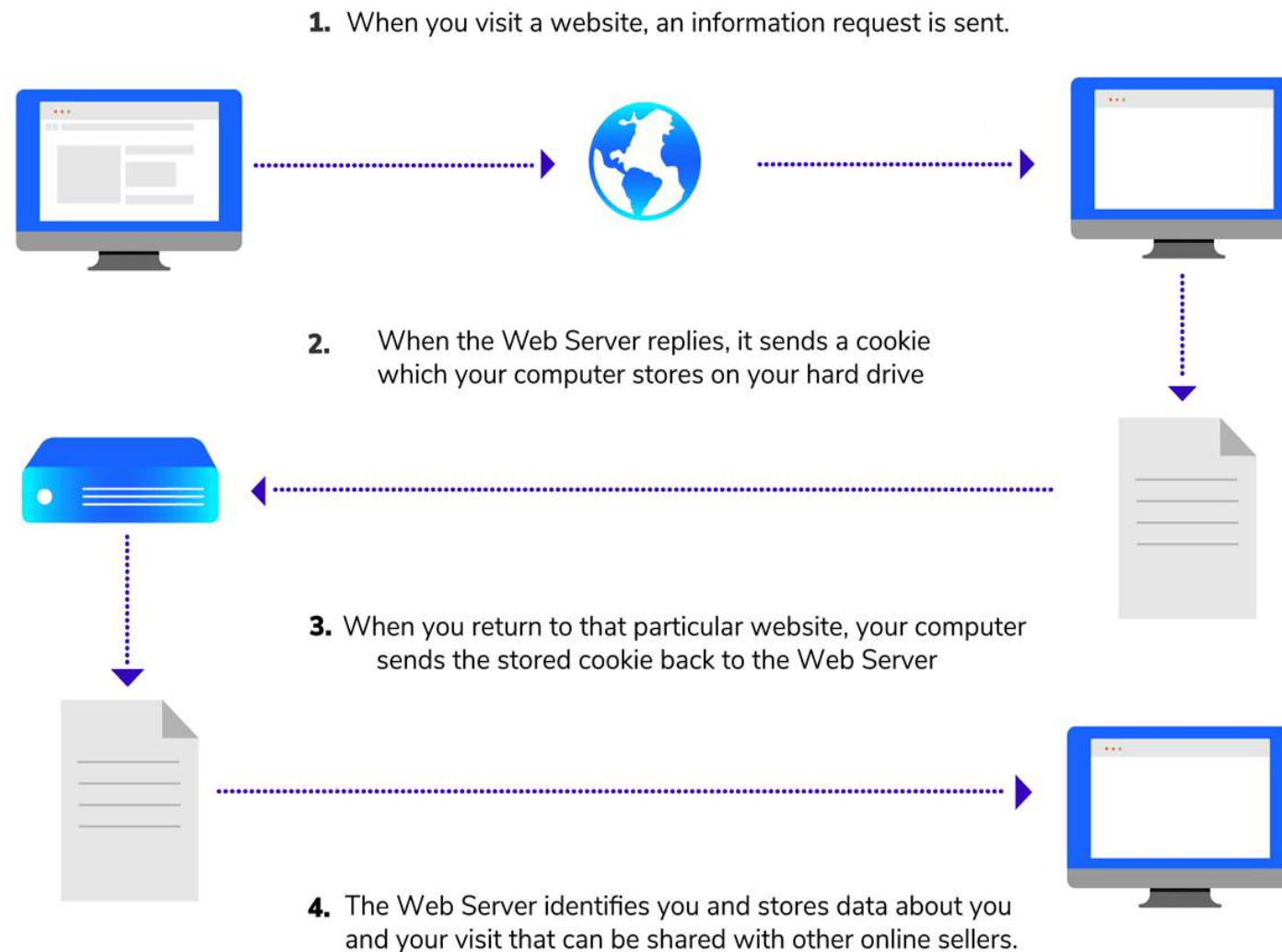
Impact of Google's postponement of third-party cookie retirement

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

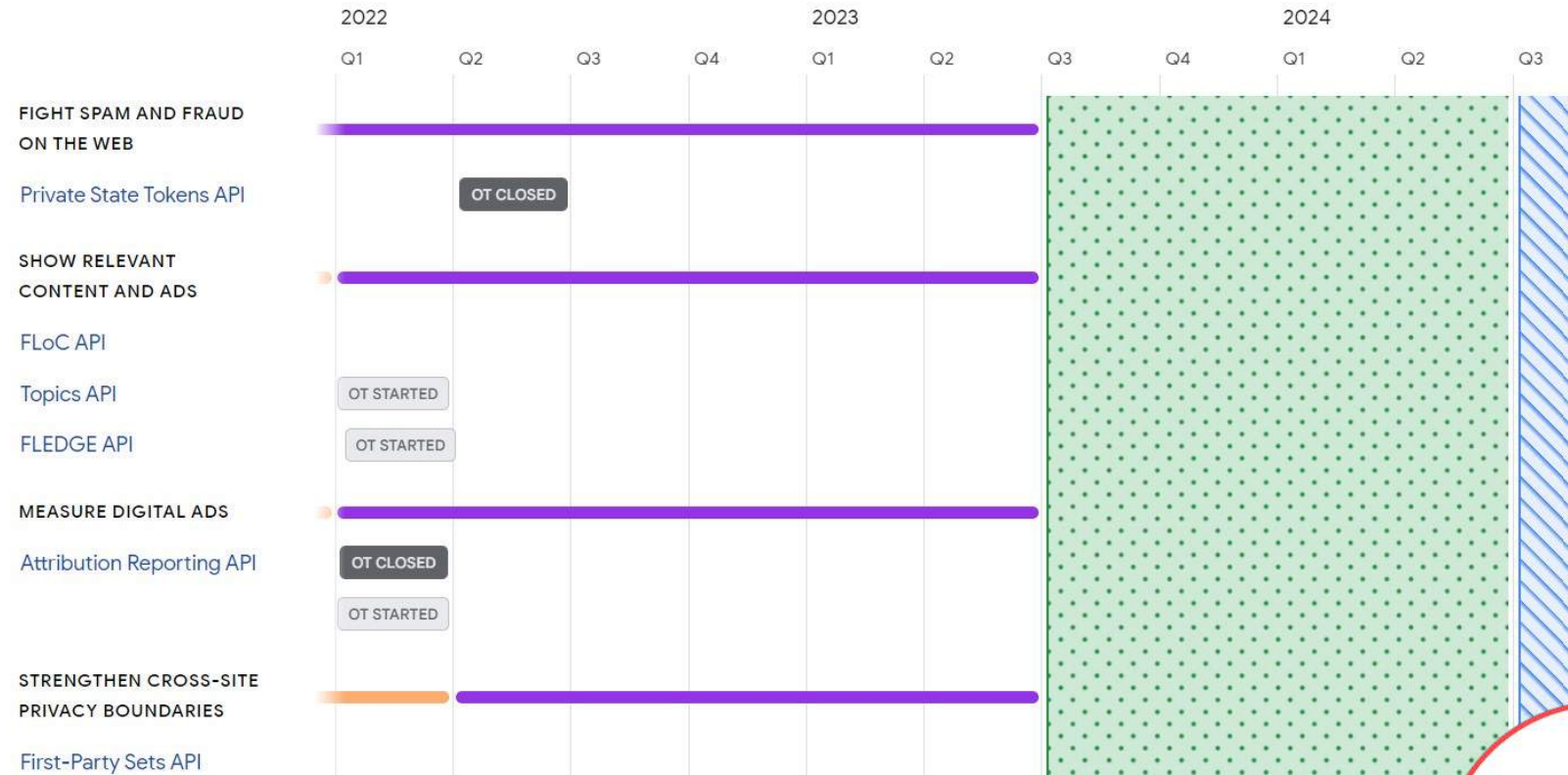


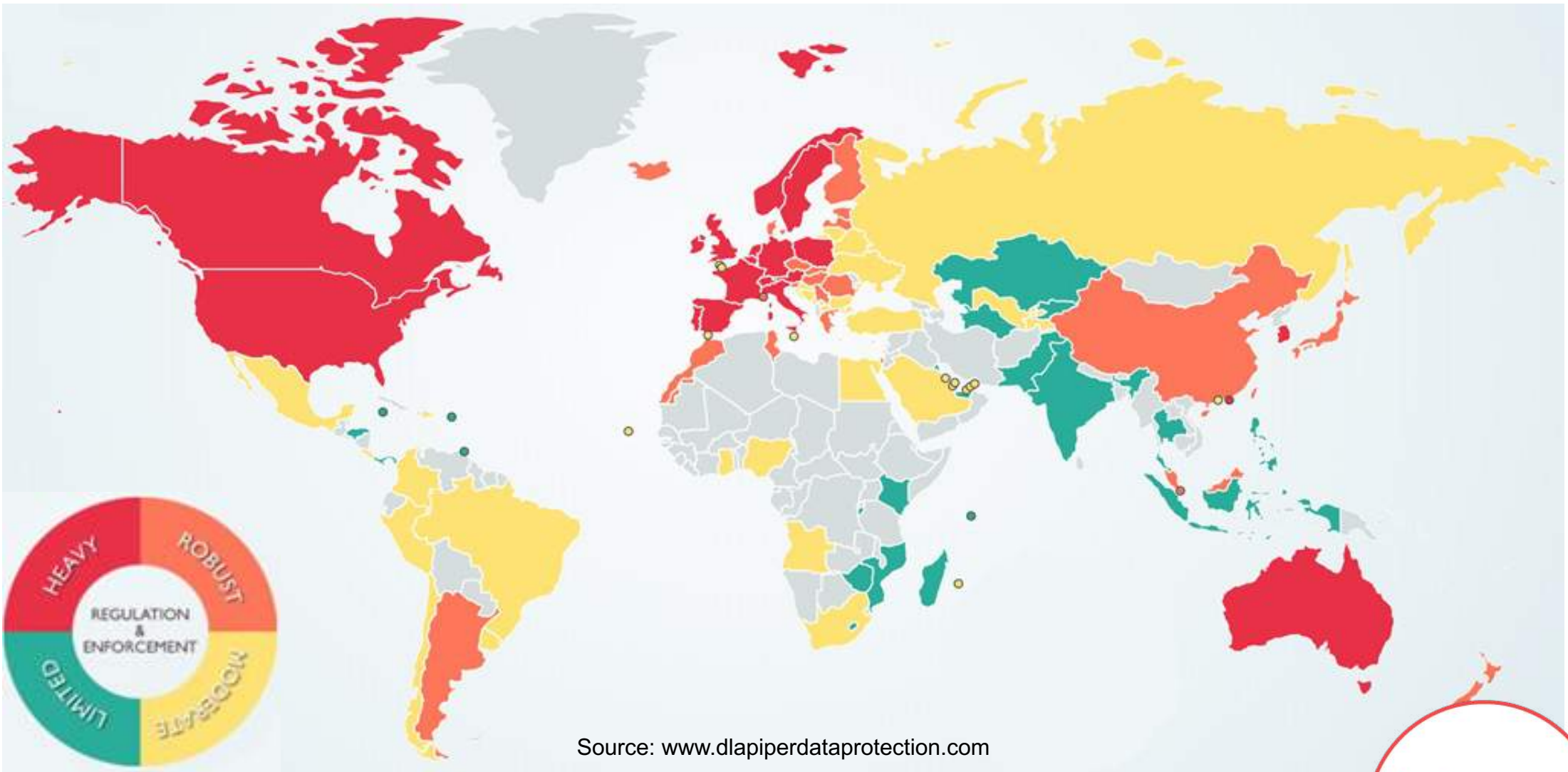






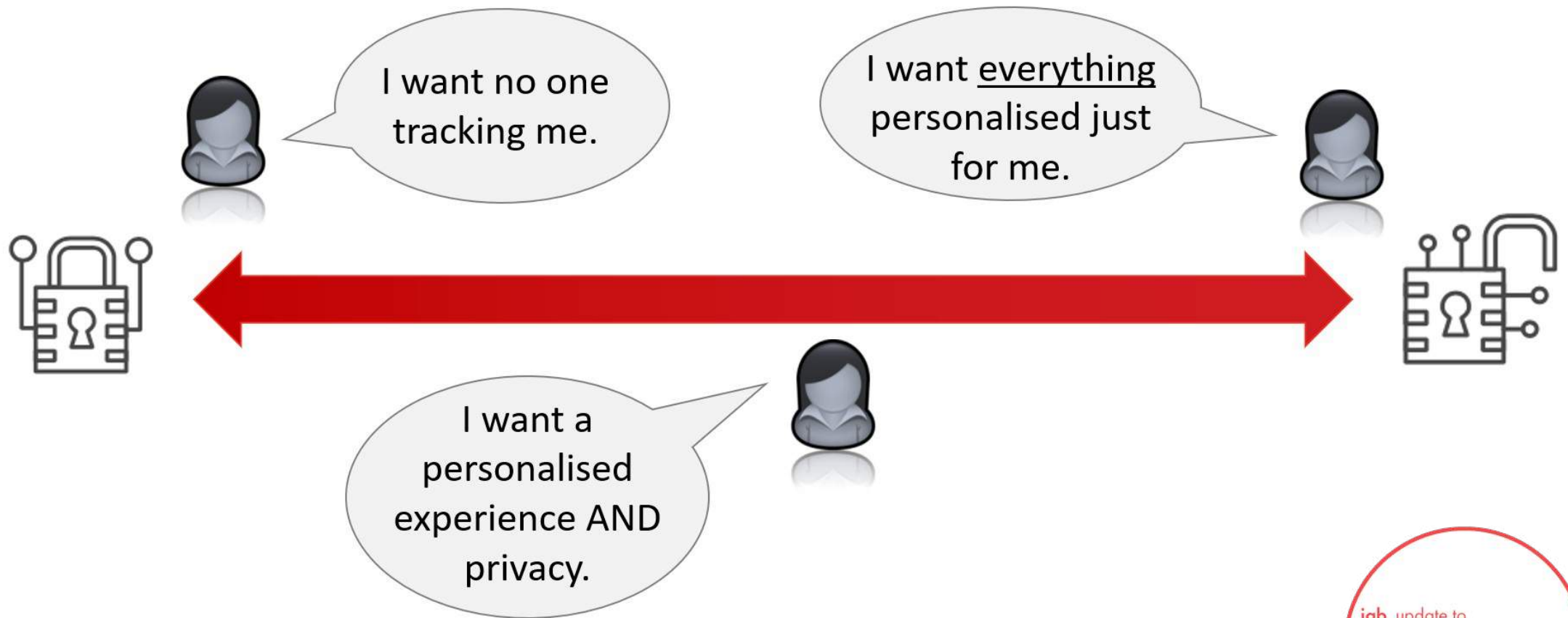
● Discussion ● Pre-Launch Testing ● General Availability ● Third-party cookie phase out







Consumers have different tolerances on the continuum of privacy and personalisation



# **Project Rearc:**

An Industry Collaboration to Rearchitect  
Digital Marketing

**iab.**

**iab.**  
TECH LAB



← No linkable user ID available →

Linkable user ID available

### Unlinked 1<sup>st</sup>-party Audiences

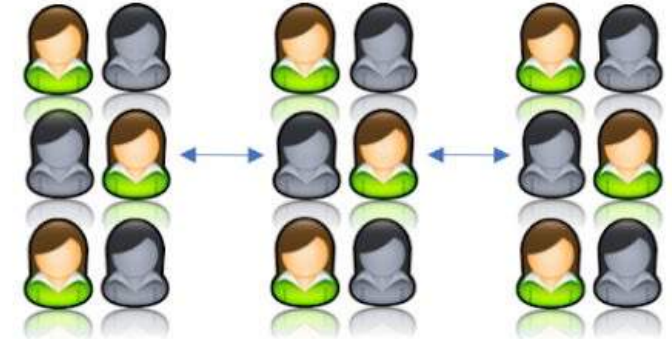
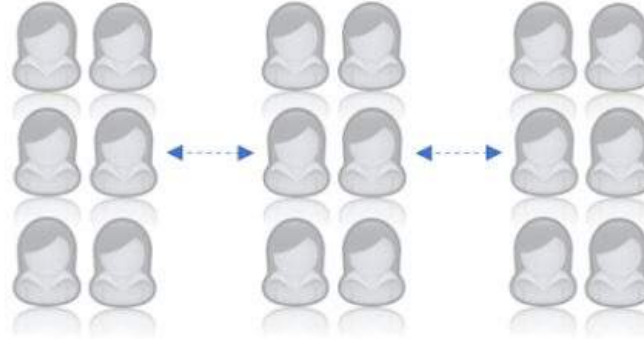
Advertiser/Publisher data not connected

### Browser/OS-linked Audiences

No 3<sup>rd</sup>-party tracking

### Linked 1:1 Audiences

Advertiser/Publisher data connected



- Contextual
- Seller-defined audiences
- Private marketplaces

- In-browser cohorts & interest groups
- In-browser auctions
- On-device measurement & attribution

- User-enabled ID matches
- Clean rooms



# the ever-changing digital consumers

**natalie stanbury**  
director of research  
**iab australia**





# Ipsos iris

The new IAB endorsed  
digital audience ratings  
system

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iab.  
australia

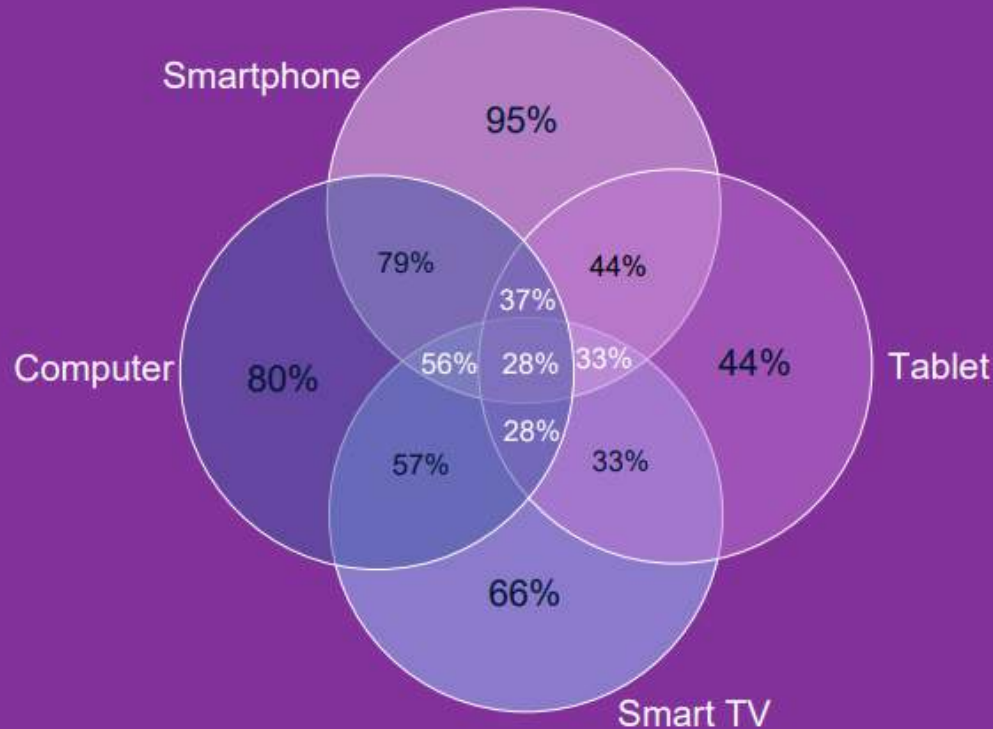




# SMART TVS ARE MOST LIKELY TO BE IN HOUSEHOLDS WHICH ARE USING BOTH SMARTPHONES AND COMPUTERS

## DEVICE OVERLAP

Devices for Personal Use



# 28%

Of Australians own a smartphone, computer and tablet for personal use and also have a smart TV in their household

# 2.75

Average number of any personally used devices (excl. smart TV)

Devices include: Smartphones, Tablets and Computers



# australian ecommerce.

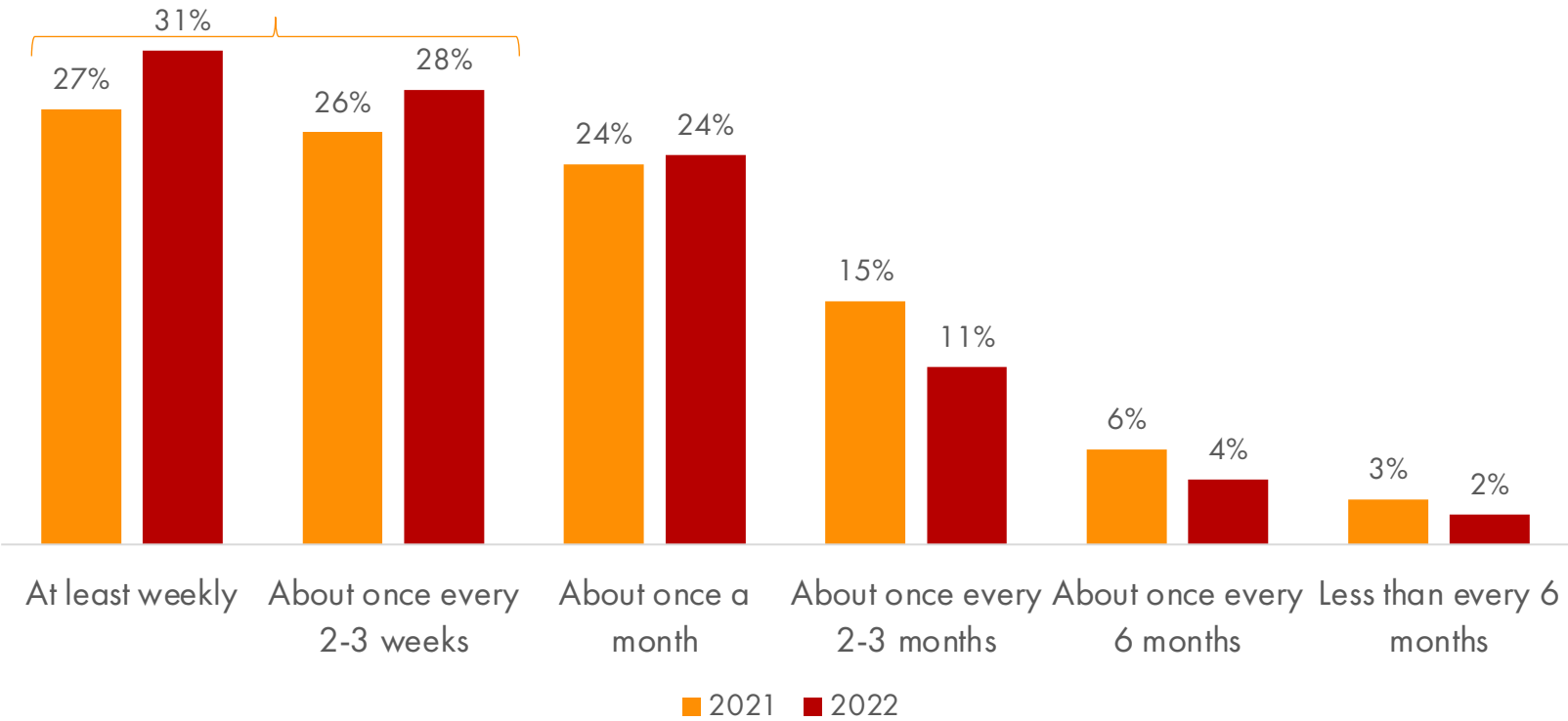
Pureprofile 

**iab.**  
australia

# increased buying frequency for online shoppers.

## frequency of online shopping

Increased frequency of online shopping over the last year



**83%**  
of online shoppers are shopping every month, up from 76% last year.



# online purchasing drivers.

Convenience  
is by far the  
greatest driver  
in buying  
online.



## reasons for buying online



# sources for inspiration and discovery.

Search remains a key to discovering brands when shopping online.

Social media plays a significant role for millennials.



Source; IAB Australia and Pureprofile Australian Ecommerce Report August 2022  
Q - When buying something online, what sources do you use for product inspiration and discovering brands? (n=1,000)

## sources used for product inspiration and discovering brands



# Five key takeaways for ecommerce.

1.

Steady growth in online retail is expected to continue even as shoppers return instore, however retailers will likely need strategies to overcome consumer hesitancy if cost-of living pressures continue to increase.

2.

Convenience and value for money are the key drivers of online shopping and brand choice. Positive omnichannel experiences are needed to reinforce behaviours as shoppers have returned instore.

3.

Retailers should amplify communication of brand proof points (e.g. innovation, personalisation, ethical and sustainable credentials) as these are compelling reasons for brand choice.

4.

Retailers should continually build trust with shoppers as it can overcome price barriers and is key to consumers being more comfortable in sharing data valuable to retailer marketing.

5.

There are a range of digital channels consumers are using to discover brands and for retailers to communicate their brand story. Advertisers that continue to invest in brand building during economic downturn will come out in a stronger position.



# data, privacy and key tech trends

**jonas jaanimagi**  
technology lead  
iab australia

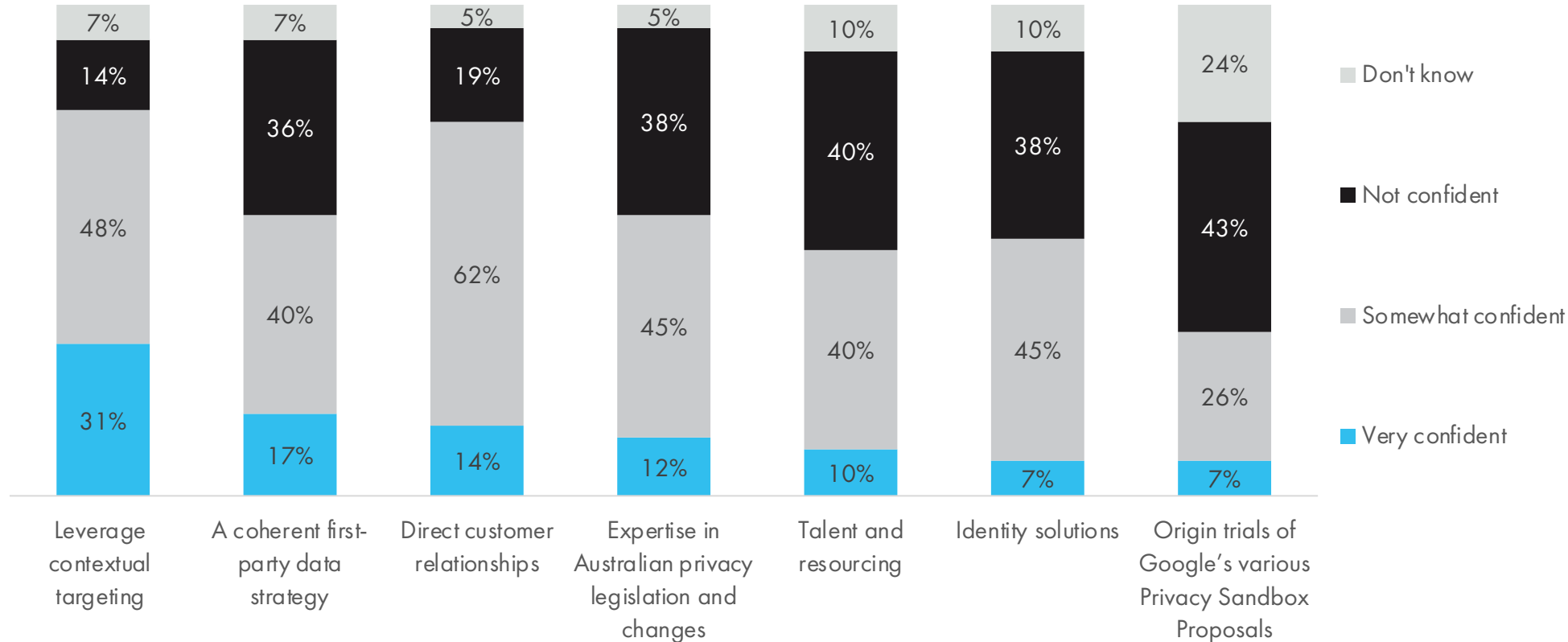


**WE NEED TO CHANGE THE WAY THAT WE COLLECTIVELY THINK ABOUT DATA, SO THAT IT IS NOT A NEW OIL, BUT INSTEAD A NEW KIND OF RESOURCE ENTIRELY.**





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



**iab.**TECH LAB

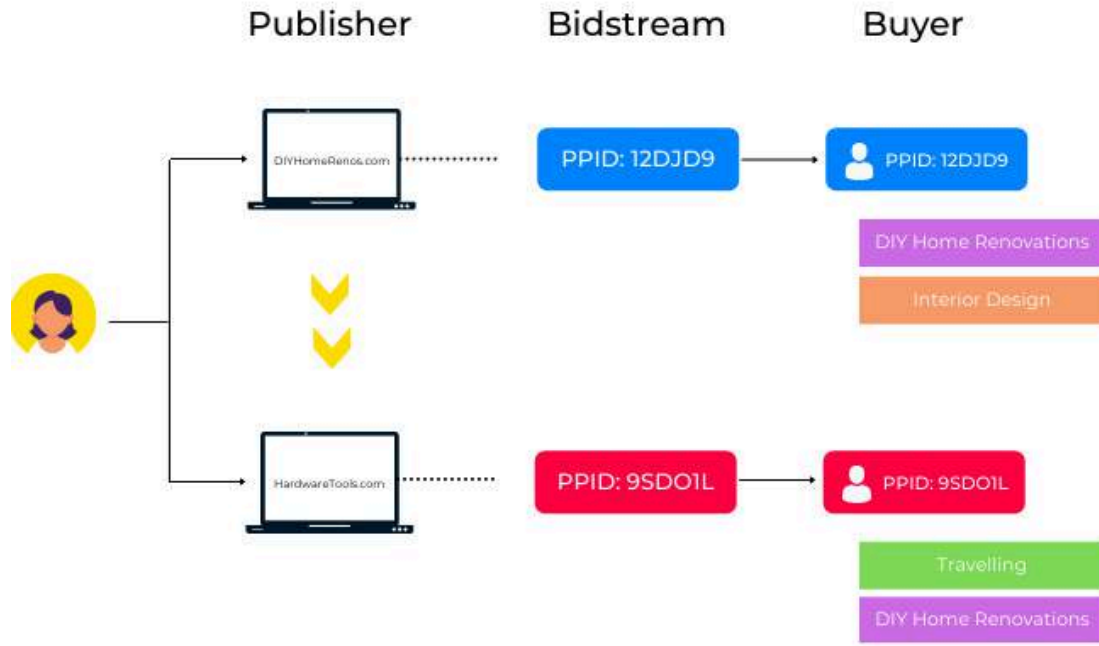
# IAB Tech Lab Finalizes Seller Defined Audiences Addressability Specification

◀ Incubated within Project Rearc, 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.**  
australia  
TECH LAB

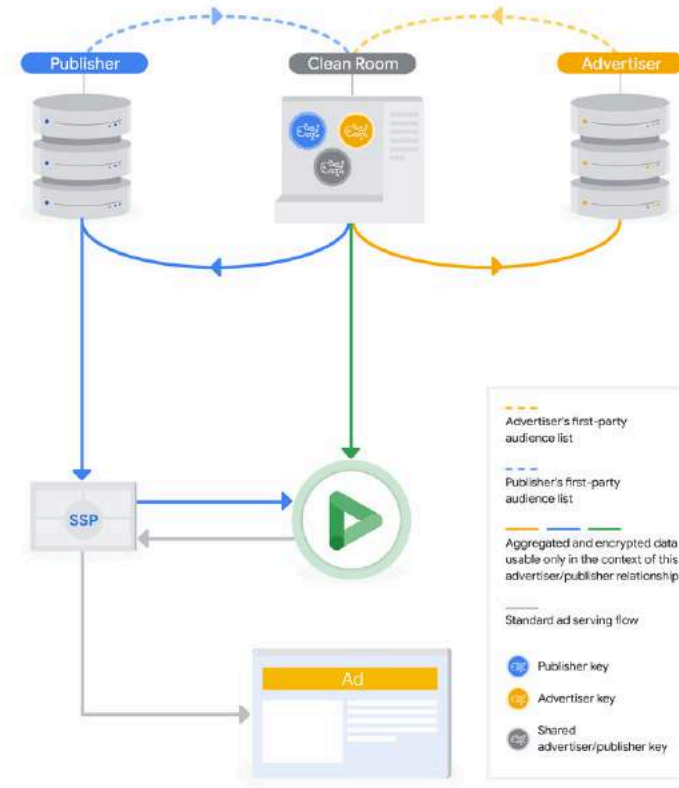
iab. update to  
**brisbane  
market**

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



source: Blockthrough

# Publisher Advertiser Identity Reconciliation (PAIR) Workflow



source: Google

1 WHO provided the data segment

## Data Transparency Facts

Data Distributor Name: **Data Company**  
Data Distributor Contact: [DataSolutionTeam@data.com](mailto:DataSolutionTeam@data.com)  
Data Provider Name: **Leasing Company**  
Data Provider Contact: [DataAccounts@leasingco.com](mailto:DataAccounts@leasingco.com)

### Audience Snapshot

**Branded Name** Auto Intenders – Six Months

**Standard Name** Auto Intenders

### Audience Description

Households likely in the market to purchase a new vehicle in the next six months

**Geographies** USA

**Audience Construction** Attributes

**Audience Count** 6,500,000

Precision Level Households

Activation ID(s) Cookies

**Audience Expansion** Yes

**Cross-Device Expansion** Yes

**Last Refresh Date** 02-Jan-2018

**Event Lookback Window** 60 Days

**Data Source** Attributes

### Source ID Description

Dealer-reported names and postal codes of individuals who requested test drives

**Source ID Contribution** 1,130,000

Precision Level Individual

ID Key Name and Postal

Source Event Transactions

Inclusion Method Observed

Seed Size (If modeled) -

**Source Refresh Frequency** Quarterly

**Event Lookback Window** 180 Days

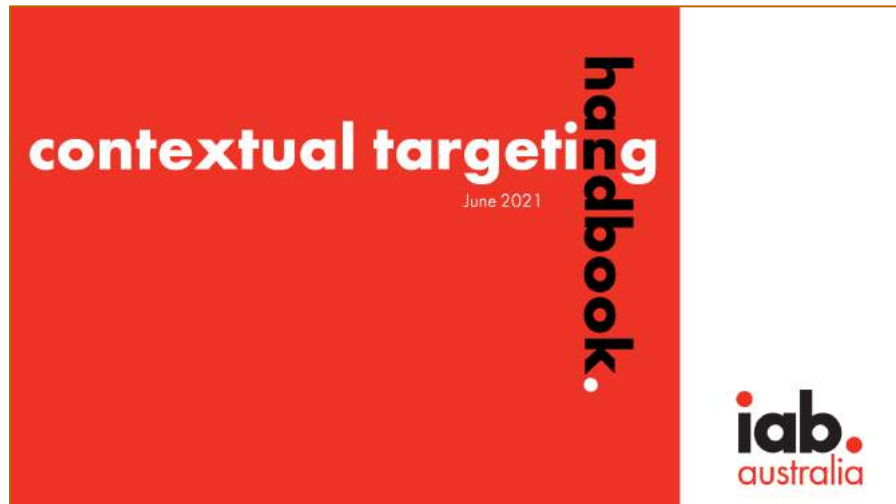
This Data Transparency Label has been developed by members of ANA's Council for Data Integrity and IAB Tech Lab's Data Transparency Working Group, with the support of CIMM, The ARF and IAB's Data Center of Excellence. For more information, please visit [datalabel.org](http://datalabel.org).

2 WHAT audience segment the label describes

3 HOW the segment was constructed

4 WHERE the original data components were sourced

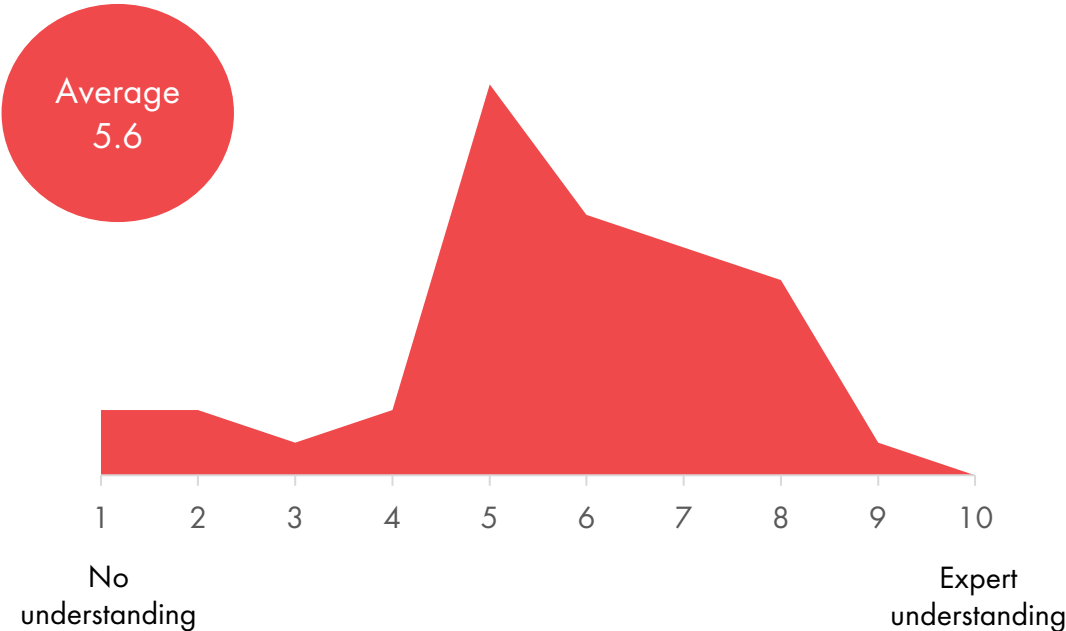




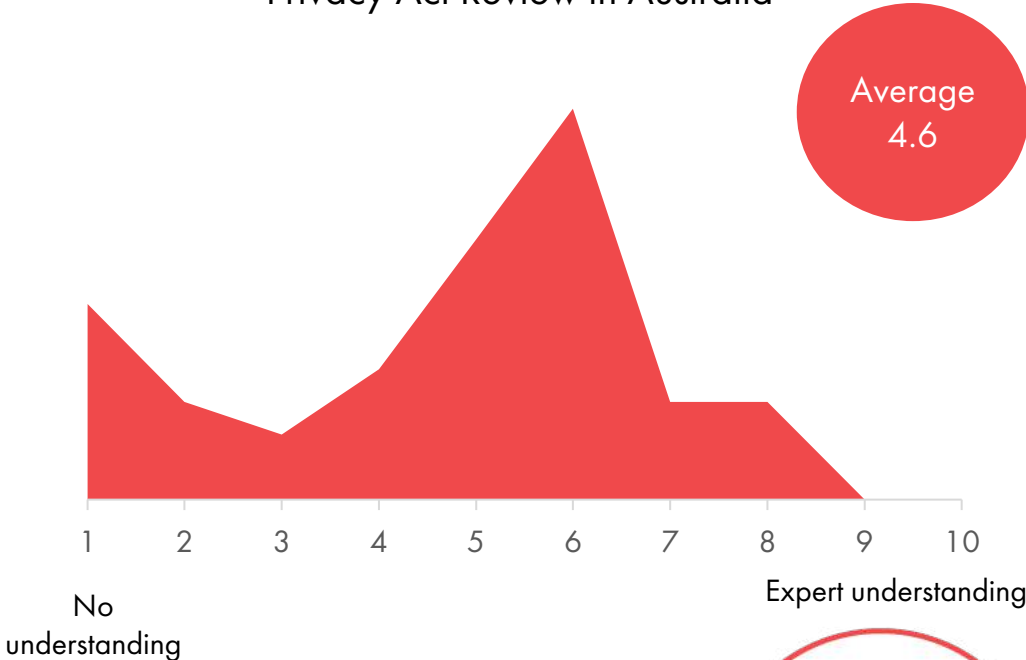


# understanding of data privacy

Understanding of current Australian privacy laws



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



## 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

- **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**

- **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.

## 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



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

- **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**

# Planning and

# Activities & use cases:

Status: Q4-Q1 launch

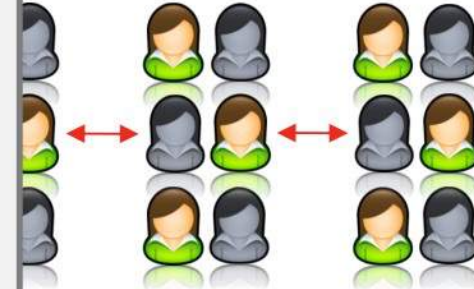
### Description:

- 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

Unlinked 1st-  
Advertiser/Publisher



Linked 1:1 Audiences  
Advertiser/Publisher data connected



Seller Defini

ID2 Open-Source Project

Best Practices for User Enabled ID

id-sources.json

Global Privacy Platform

Accountability Platform

## Planning and

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:

### Unlinked 1st-

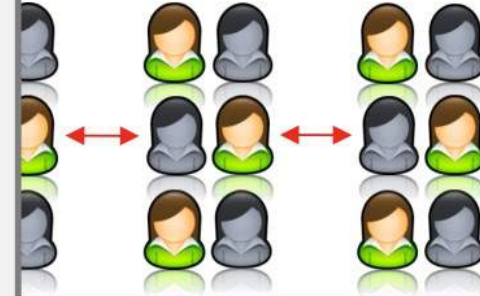
Advertiser/Publisher



Seller Definit

### Linked 1:1 Audiences

Advertiser/Publisher data connected



ID2 Open-Source Project

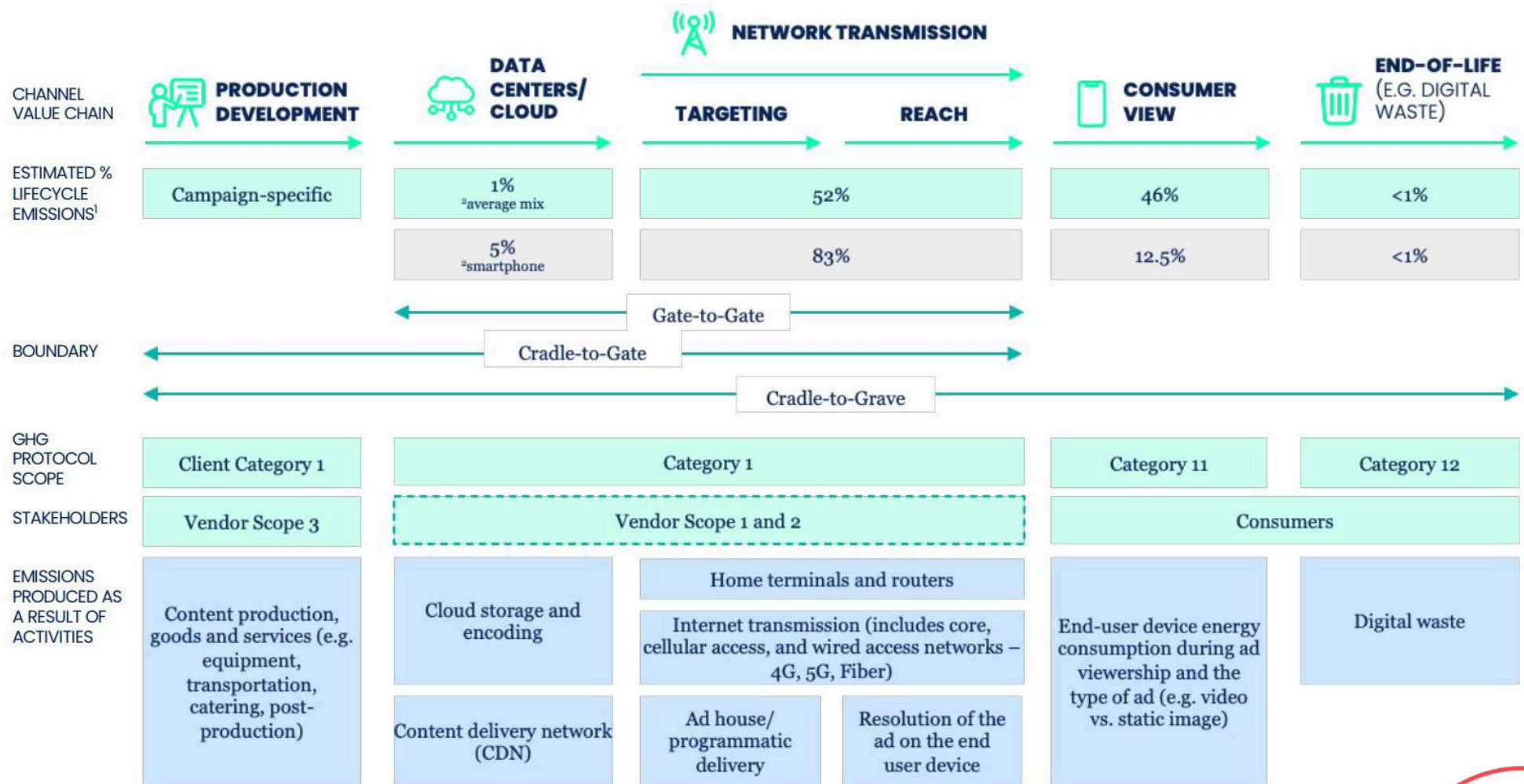
Practices for User Enabled ID

id-sources.json

Global Privacy Platform

Accountability Platform







# Vision

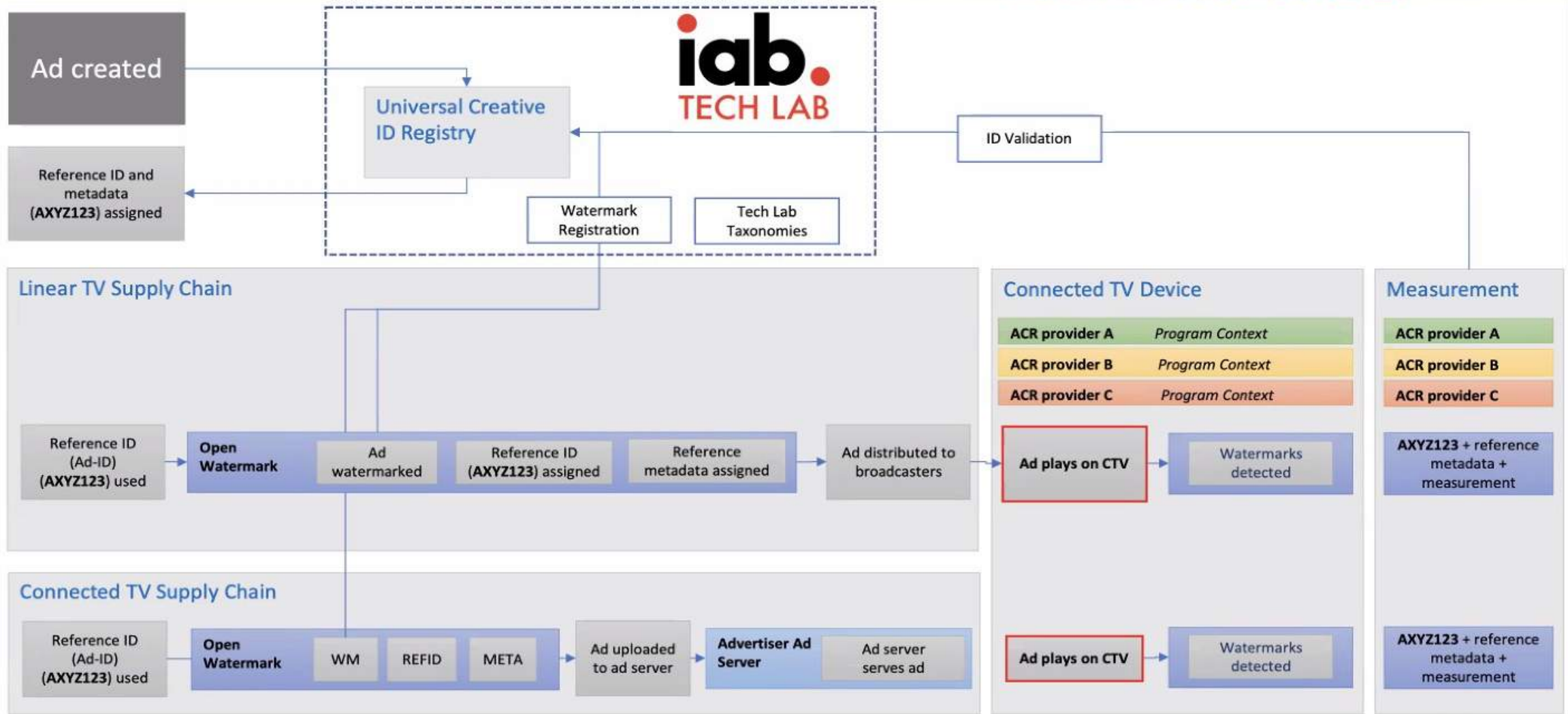
A system of standardized technology, protocols, and operations that enable a seamless, robust, and measurable experience for providing video content and addressable advertising to consumers on any screen, in any format, and across all television environments.

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

# VISION: Unified Supply Chain



# iab resources

training & development

**programmatic  
advertising and trading**  
deakin microcredential



august 2022

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



microcredential

**digital advertising  
operations**





For more information visit: <https://iabaustralia.com.au/mentorship-program-2022/>



# how to best engage with iab australia.

We get asked, where do I begin with my IAB membership and how should I best stay across what you are doing? So here are a few ways to get the most out of your IAB Australia membership...

## 1. Sign up to our newsletter from the IAB Australia homepage

It comes out every Thursday afternoon and contains our key releases for the week, a great overview of what is happening from Gai and some member content!

## 2. Follow us on socials

@IAB Australia is on Twitter, Meta, LinkedIn and most recently on Instagram. If you really want to stay up to date also follow @Gai Le Roy and @Jonas Jaanimagi

## 3. Check out our range of content

Through the IAB Australia website we have written Q&A articles, Podcasts, Video Content, Handbooks all to keep you informed – have a look through the website and if you cant find what you are looking for, reach out!

## 4. Get in touch

We all look after a different speciality – Privacy, Research, Technology, Landscape, Training & Development, Marketing and Events – we love to hear from our members so don't be a stranger and feel free to reach out to any of us for a chat



Event	Date	Timing	State
Audio Summit	Wednesday 1 <sup>st</sup> March	Morning	NSW
Audio Summit	Tuesday 7 <sup>th</sup> March	Morning	VIC
pDOOH Event	Thursday 30 <sup>th</sup> March	All day	NSW
Affiliate Marketing Event	Tuesday 4 <sup>th</sup> April	Afternoon	NSW
Data & Privacy Summit	Wednesday 3 <sup>rd</sup> May	Morning	NSW
Digital AdOps	May	Half day	NSW
Video Summit	June	Morning	NSW
Game Advertising Summit	July	Afternoon	NSW
Brisbane Market Update	August	Morning	QLD
MeasureUp	September	All day	NSW
Digital AdOps	November	Half day	VIC
End of Year Celebration	Wednesday 6 <sup>th</sup> December	Afternoon	NSW
End of Year Celebration	Wednesday 13 <sup>th</sup> December	Afternoon	VIC

+IAB Australia members receive 2 free tickets to all events\*