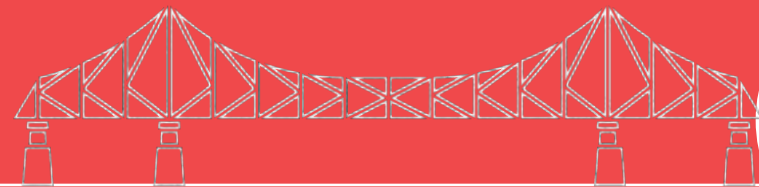


welcome.

**iab.**  
australia



iab update to  
**brisbane**  
market.

**digital media  
investment trends**

buyside trends

consumption trends

commerce

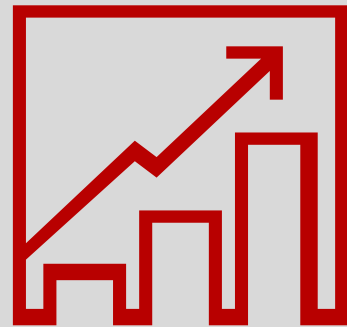
# 01. digital media investment trends

# \$14.2 billion

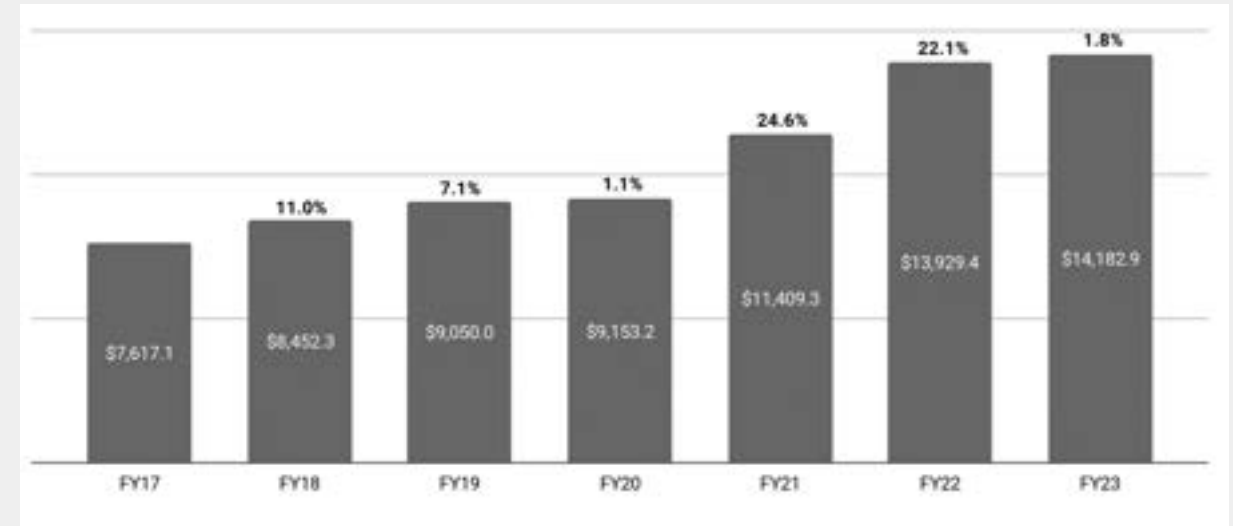
Total online advertising market FY23

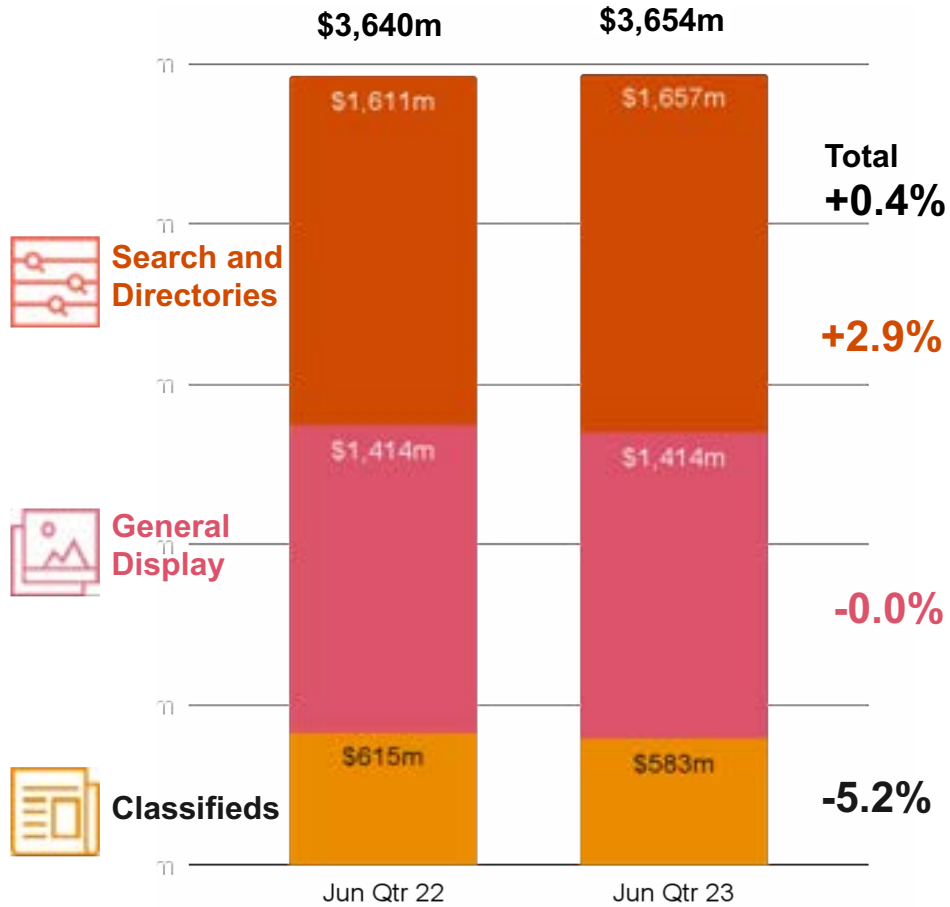
## +1.8%

Online advertising market growth  
FY23 vs FY22

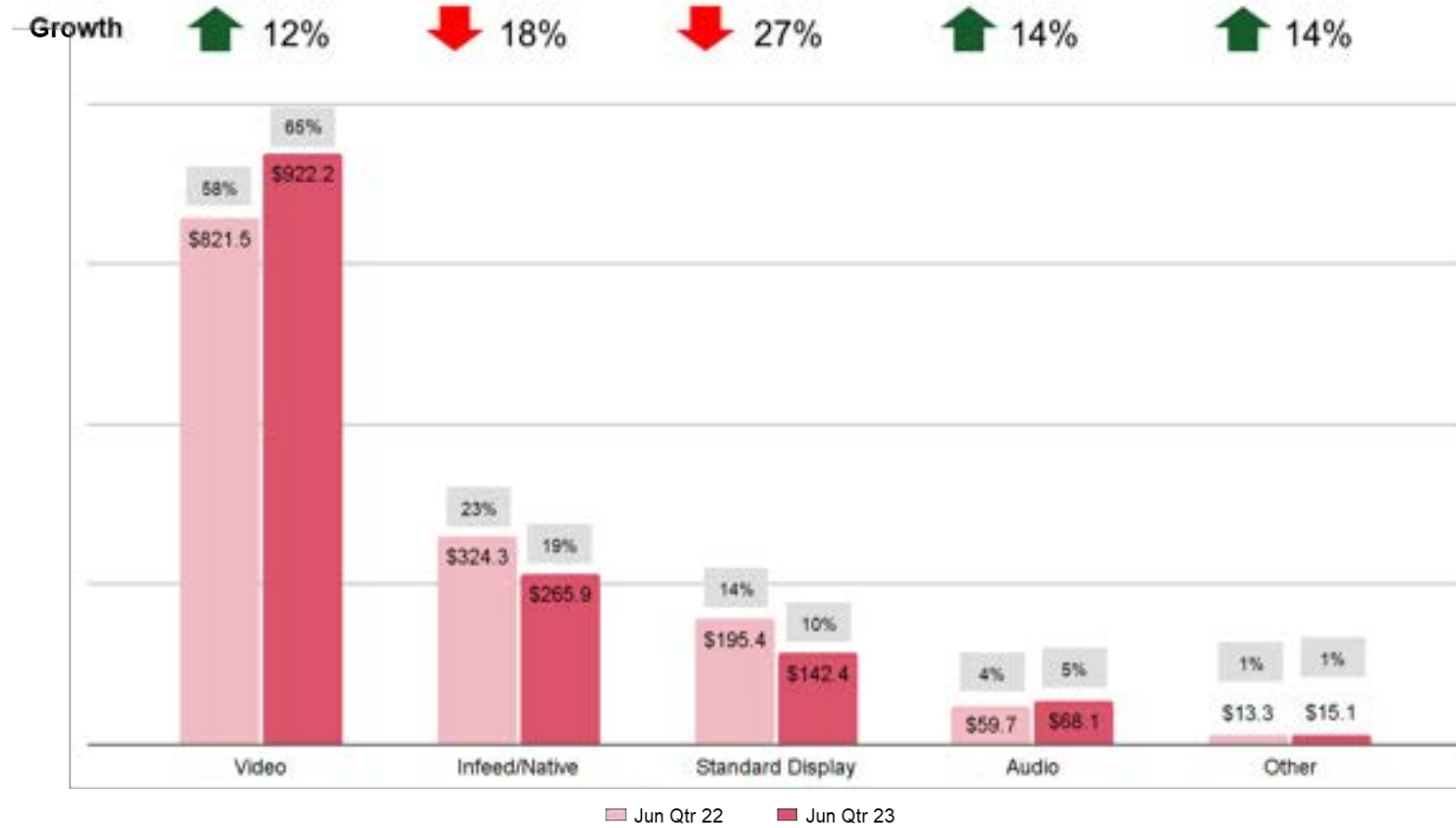


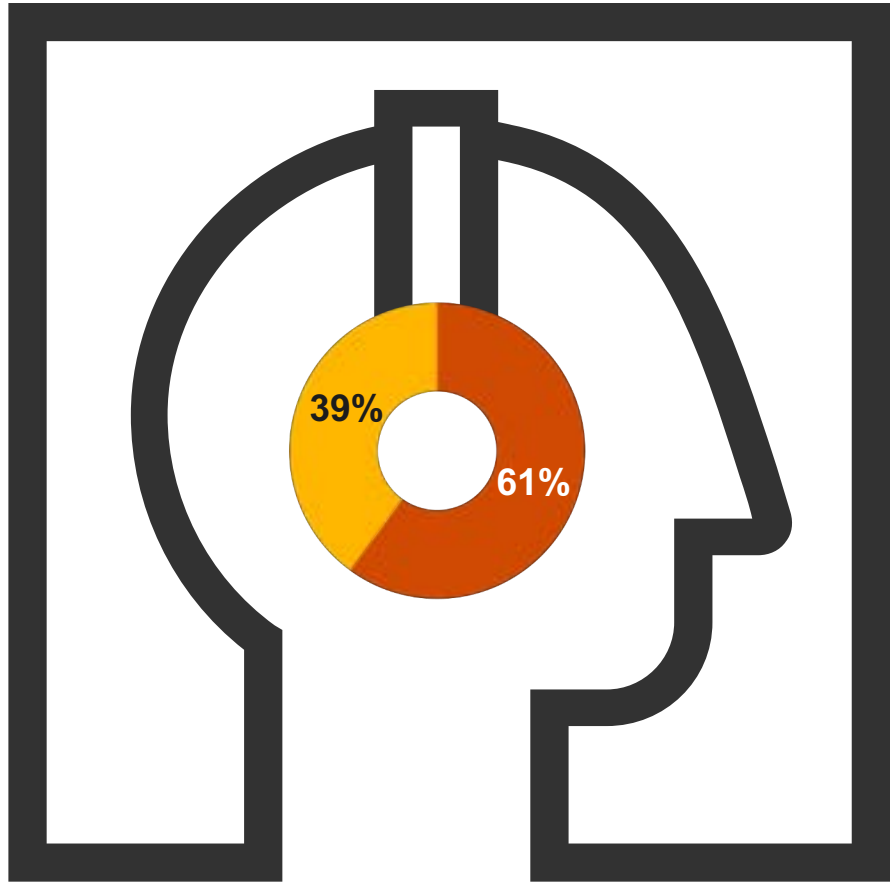
## total online advertising expenditure, by financial year (\$ million)





General display advertising – By type compared to prior comparative quarter (\$ million)





The total Australian online audio advertising market in FY23 was

**\$235.6m**

representing

**4.3%**

of total FY23 general display advertising expenditure

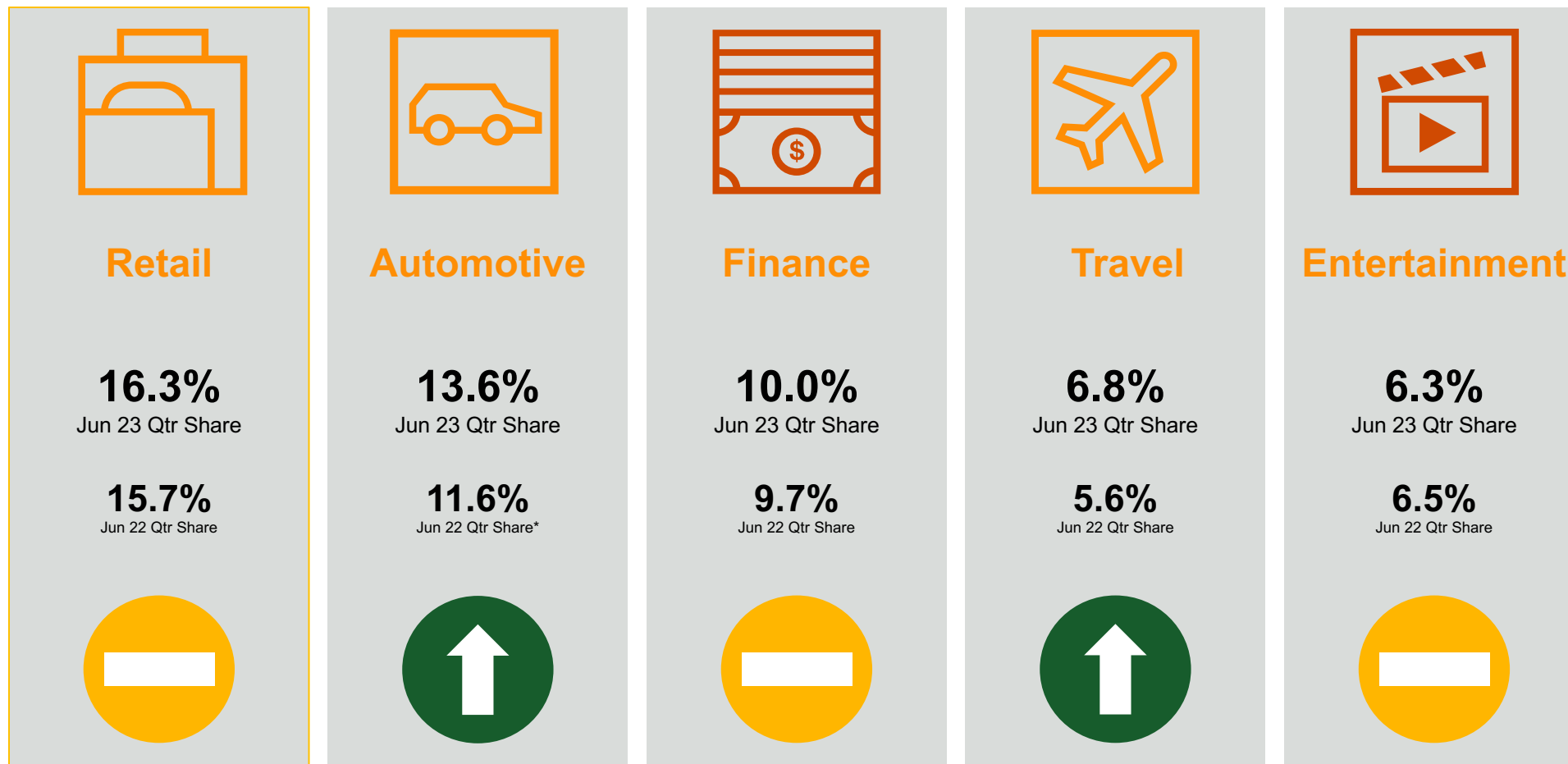
**\$91.2m**

Podcast advertising expenditure

**\$144.4m**

Streaming advertising expenditure

Top five industry categories for reported general display by expenditure type, June 2023 Quarter



Reported General Display market refers to General Display expenditure reported by survey contributors and therefore excludes Facebook, Google, X (formerly known as Twitter), Snapchat, Spotify, TikTok, Pinterest, Amazon, LinkedIn General Display advertising.

Source; IAB Online Advertising Expenditure Report, financial year and quarter ended June 2023 prepared by PwC



# IAB Australia Online Advertising Expenditure Report

For the financial year and quarter ended 30 June 2023



digital media  
investment trends

**buyside trends**

consumption trends

commerce

## 02. buyside trends



# what's different

- Buyers are looking for more control and assurance with an increase in PG and direct buys.
- Although brand is still number one referenced object mid funnel and performance objectives have increased sharply over the last year.
- Increase in cross media effectiveness assessment (incl MMM), decrease in siloed measurement and measurement challenged by signal reduction.
- Finally, a little more tailoring of creative for environments and audiences.



digital media  
investment trends

buyside trends

**consumption trends**

commerce

## 03. consumption trends

# Ipsos iris

The new IAB endorsed  
digital audience ratings  
system

---

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# digital ad market supports australian content and service consumption across multiple screens

**21 million**

average 117 hours pp –  
australians (age 14+) online



**mobile**

19.1 million  
av 92 hours p/m



**desktop**

14.3 million  
av 32 hours p/m



**tablet**

4.0 million  
av 62 hours p/m



**connected tv**

OzTam & YouTube  
integrations into Ipsos iris  
coming soon

# cost of living pressures impact Australians

- increased consideration of **supermarket** purchases

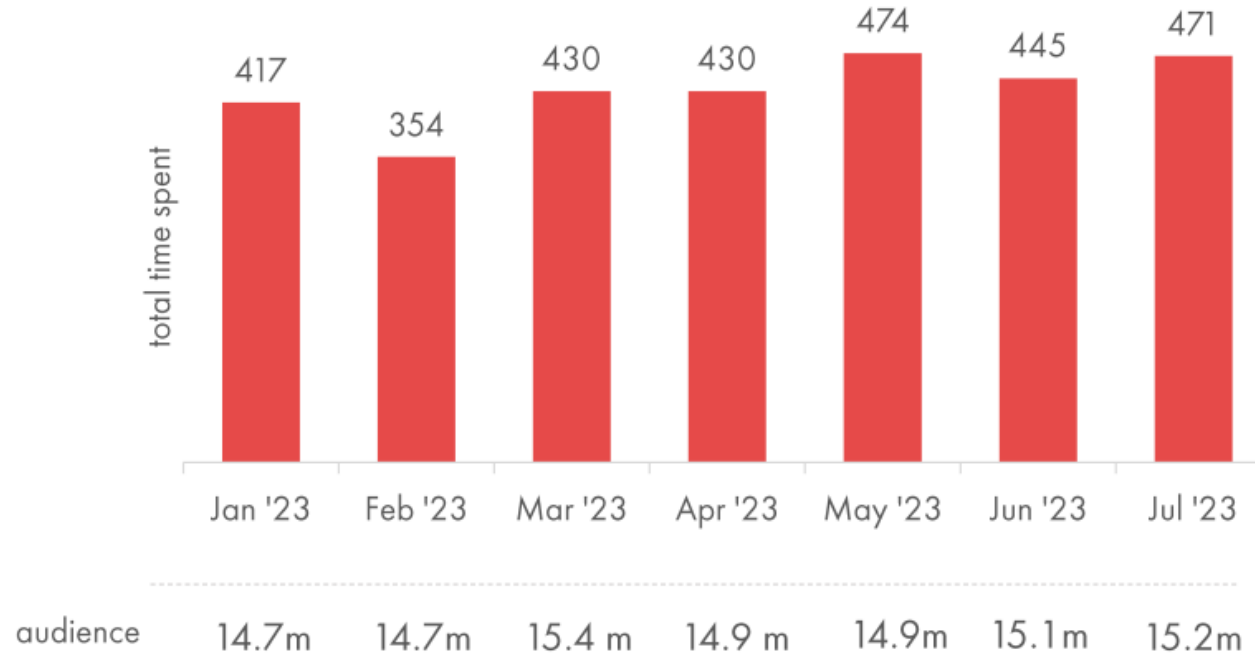


**13% increase**

in total time spent  
in July, compared to  
January.

5.2 million Australians using  
supermarket websites and  
apps in July.

usage of supermarket websites and apps  
monthly time spent and audience





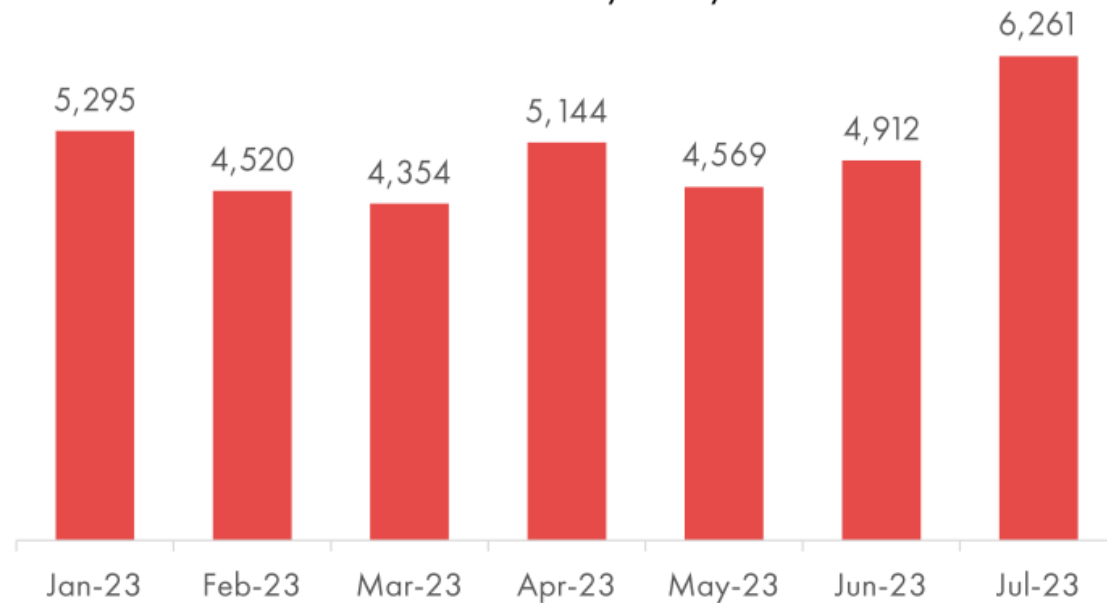
# 'Barbenheimer' drives 27% growth in usage of movie and cinema websites and apps in July 2023



**6.26 million**

Australians aged 14+ used a movie/cinema website or app in July. Launch of the Barbie and Oppenheimer films fuelled 27% audience growth on month prior.

usage of movies & cinema websites and apps  
audience 000's January to July 2023



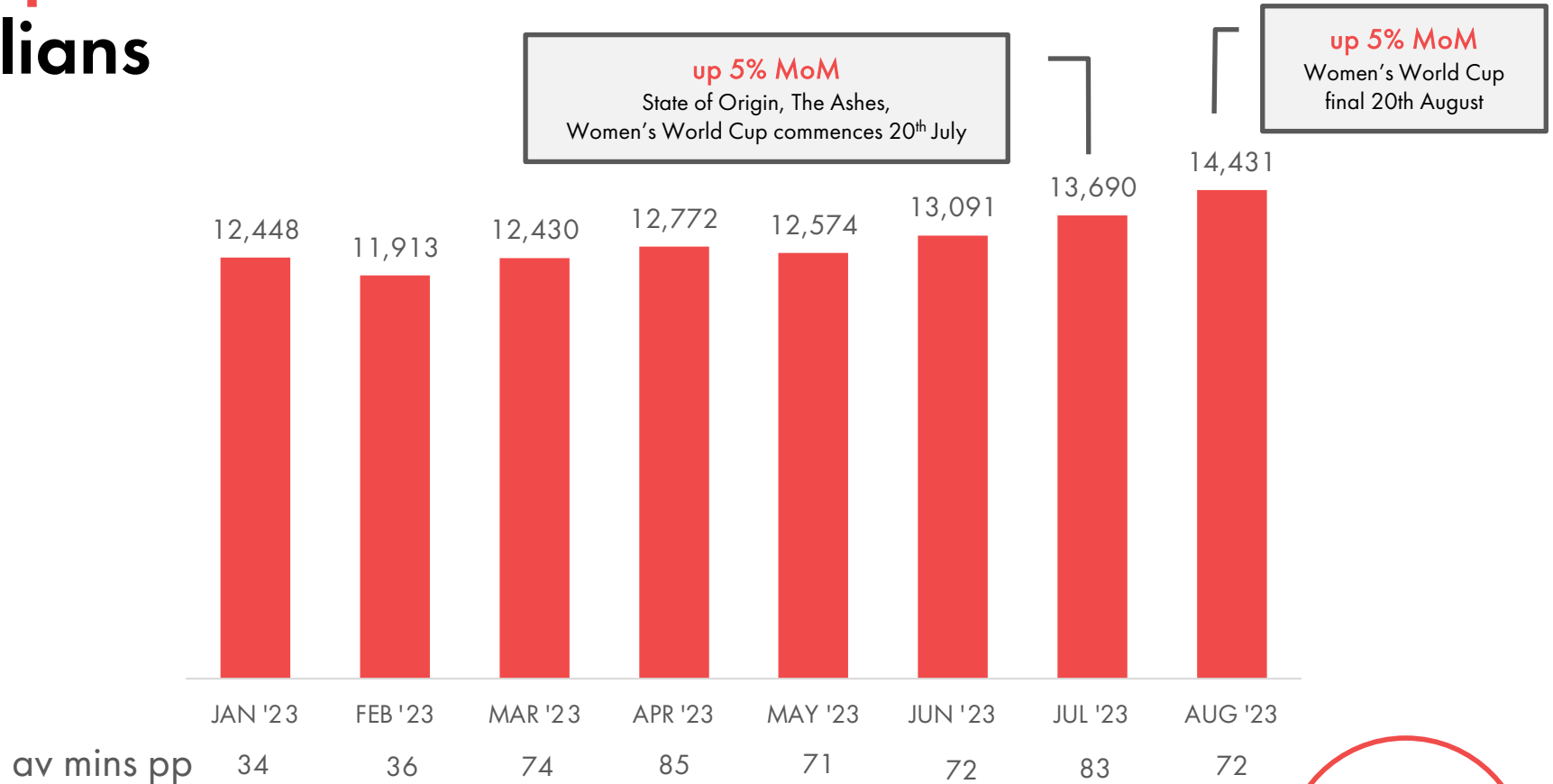
# matildas and women's world cup captivated Australians



## 14.4 million

Australians aged 14+ visited an online sports website or app in August 2023. This represents further growth recorded in July, a total **10% increase** in online sports audience since June.

usage of online sports  
-websites and apps on computer, smartphone, tablet-audience 000's



# young women lead increase in audience to online sport content in August 2023, driven by Women's World Cup



## 72 mins

av time spent per person on online sports website or app in August 2023.

Online sports audience increased across a range of age groups driven by Women's World Cup.

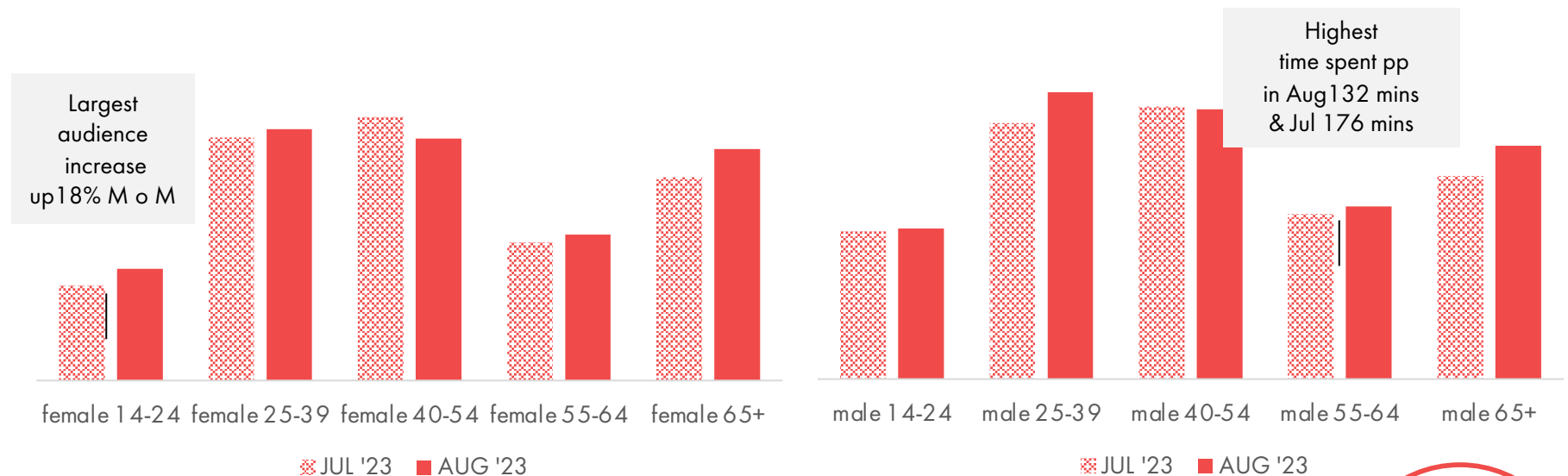
usage of online sports  
-websites and apps on computer, smartphone, tablet-  
audience 000's



6.8m women  
up 4% M o M



7.7m men  
up 7% M o M

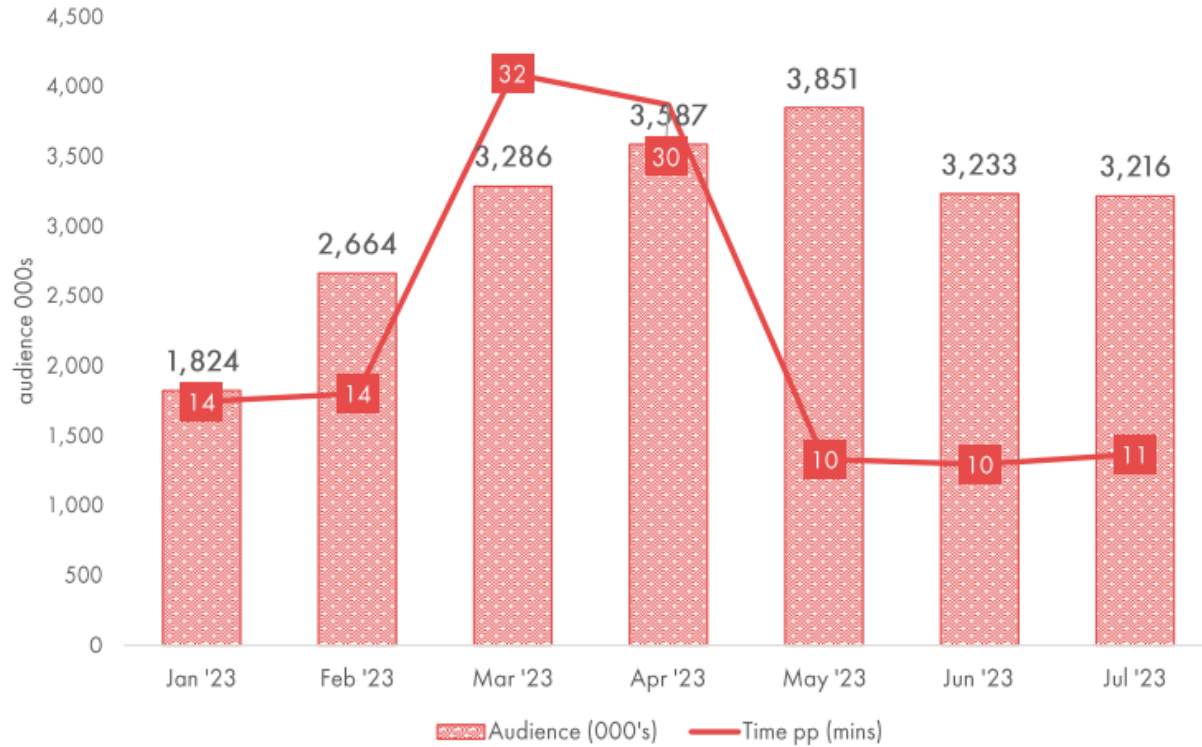




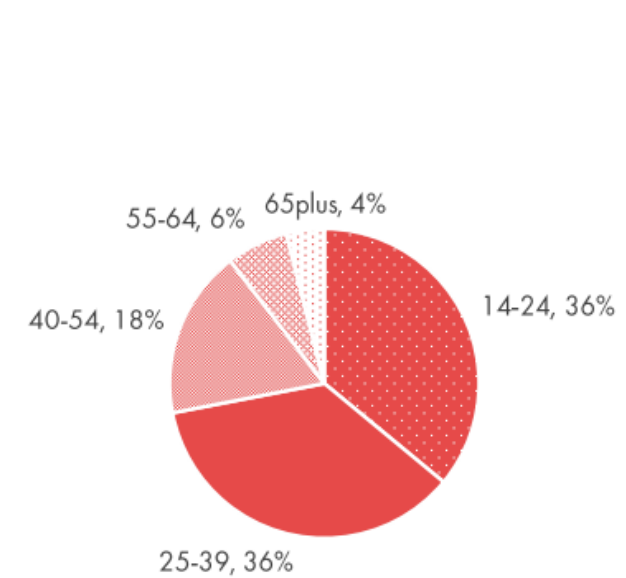
# OpenAI (Chat GPT)

Over 3.2 million Australians visited OpenAI in July 2023

### audience and time spent trend



### audience profile





digital media

investment trends

buyside trends

consumption trends

**commerce**

## 04. commerce

after significant growth in peak pandemic years, Australian consumer online retail spend contracted -5% year on year in 2023.

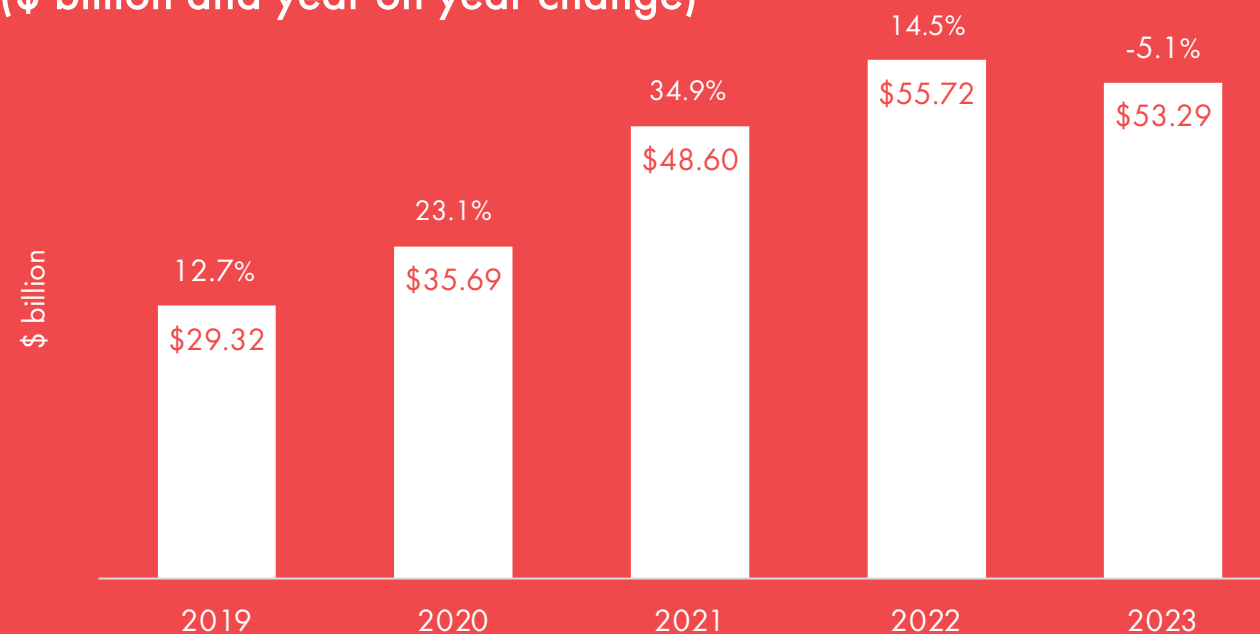
---

**\$53.29 billion**

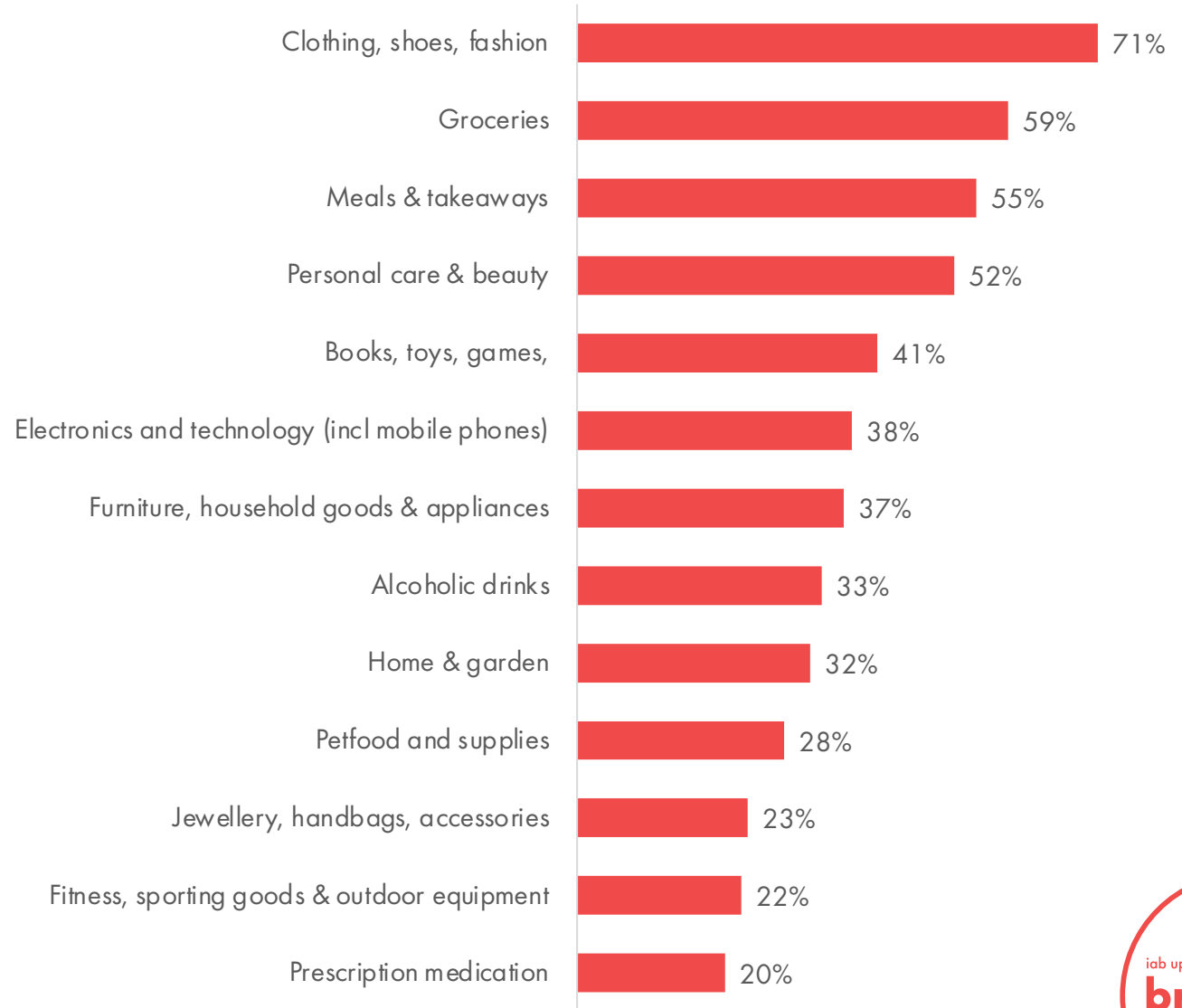
Australians' expenditure on online retail in the 12 months ending June 2023, according to NAB.

This represents around 12.7% of the total retail trade estimate.

NAB online retail sales, 12 months ending June (\$ billion and year on year change)



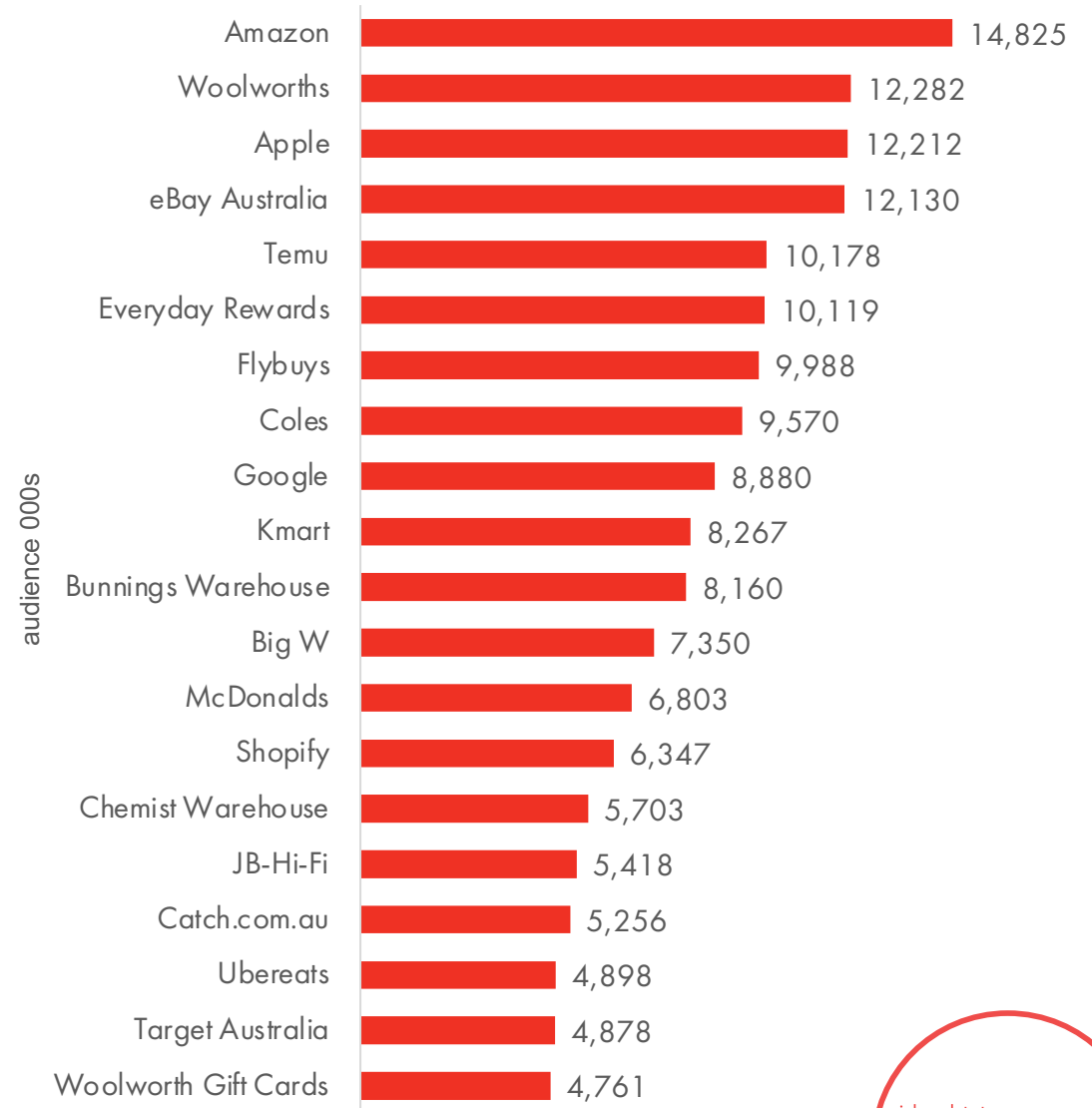
# products bought online over last year



# retail category top 20 online brands, monthly audience aged 14+

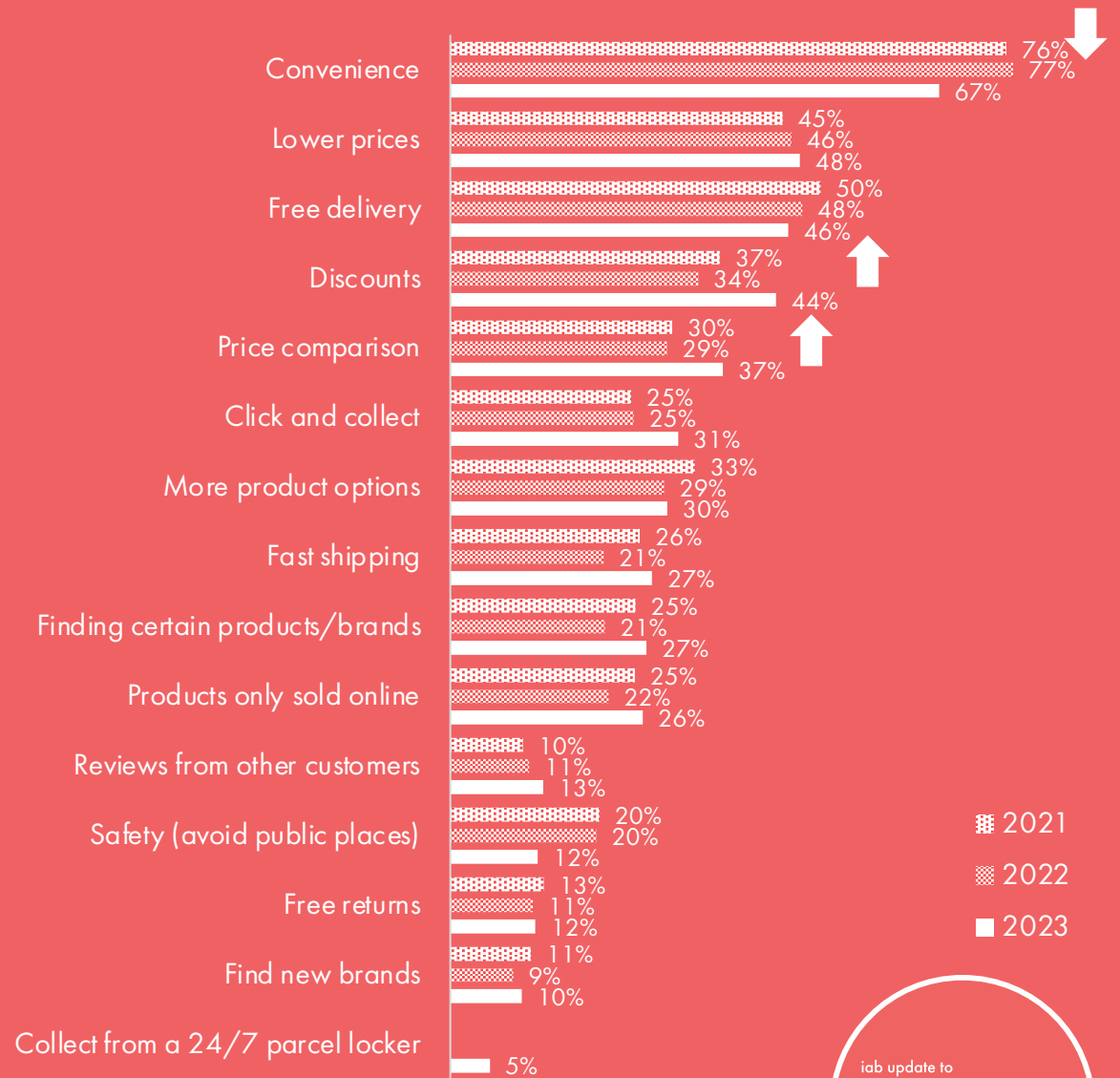
**20.6 million**

Australians aged 14+ used a retail website or app in July 2023.

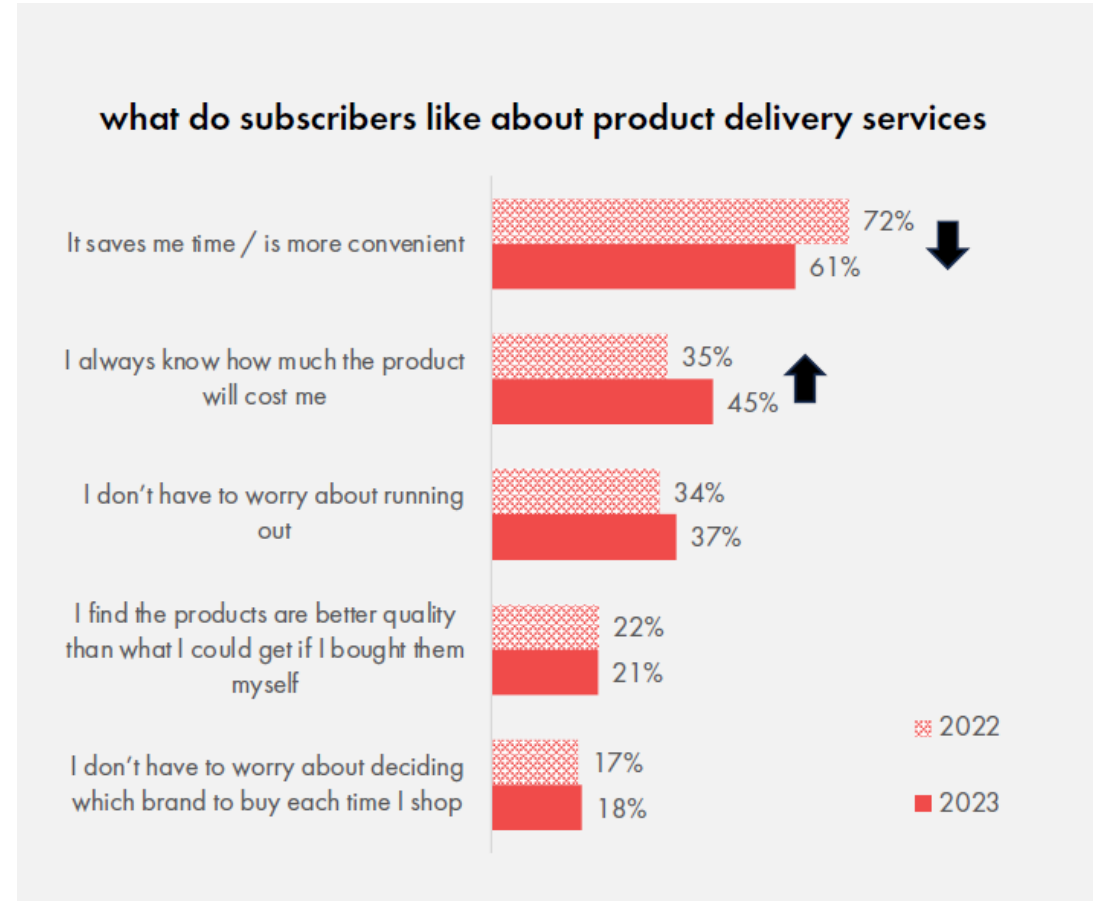
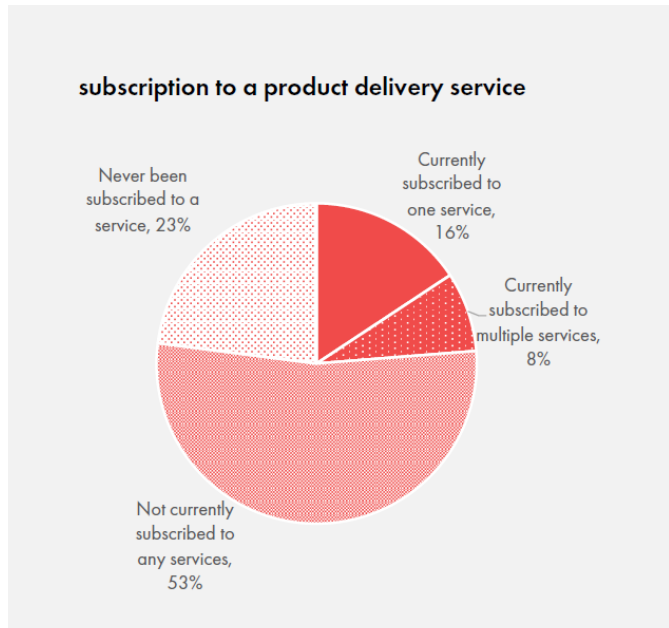


# online purchasing drivers

Convenience remains the #1 reason for purchasing online but has declined as a driver for buying online in 2023 (down -10% pts on last year).



# price assurance now a factor for subscription delivery services





# cost-of-living impacts on shopping behaviour

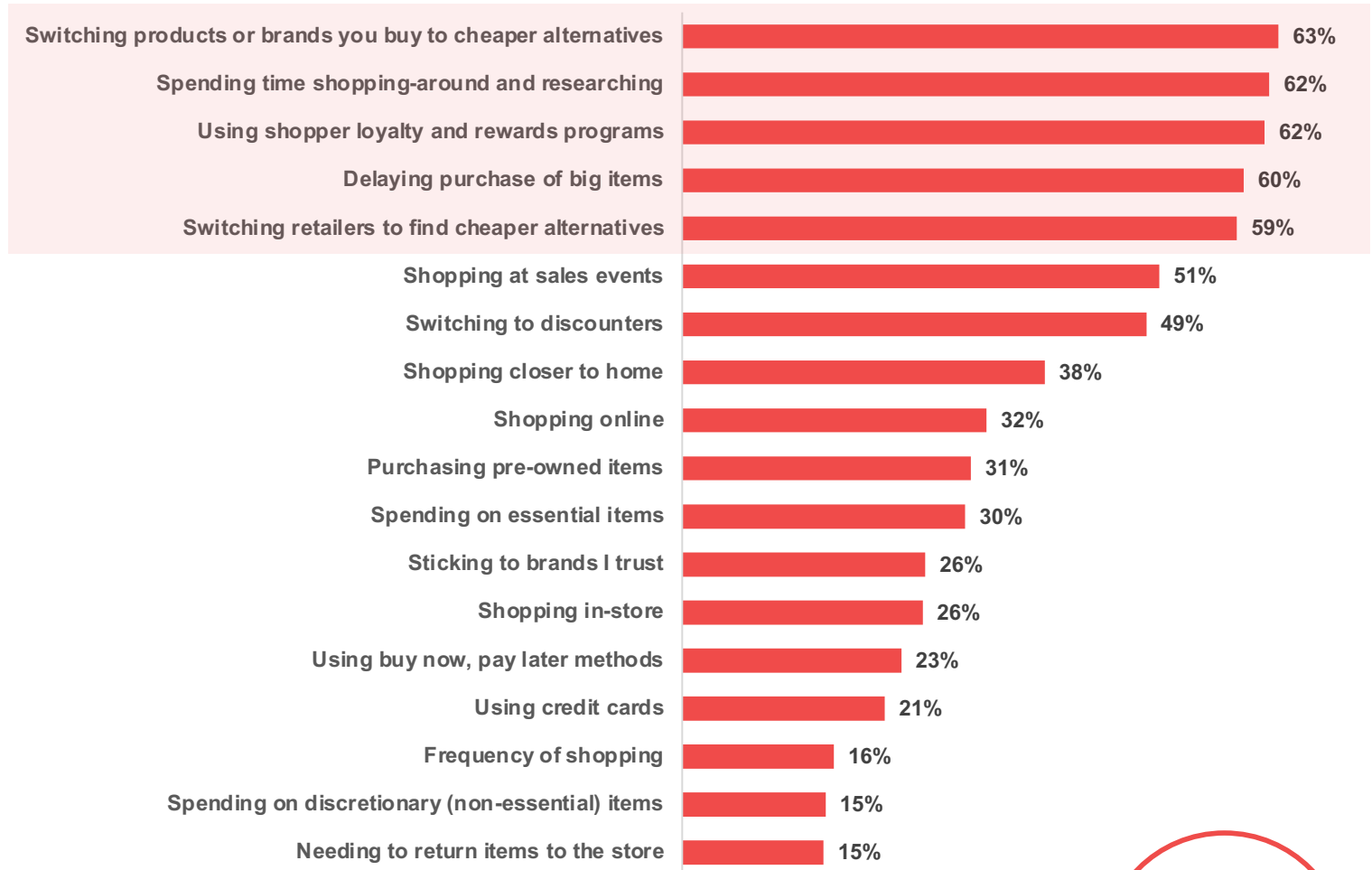
## more

- brand, product and retailer switching
- time spent researching
- usage of shopper loyalty/ rewards
- delaying purchases

## less

- spending on non-essentials
- frequency of shopping

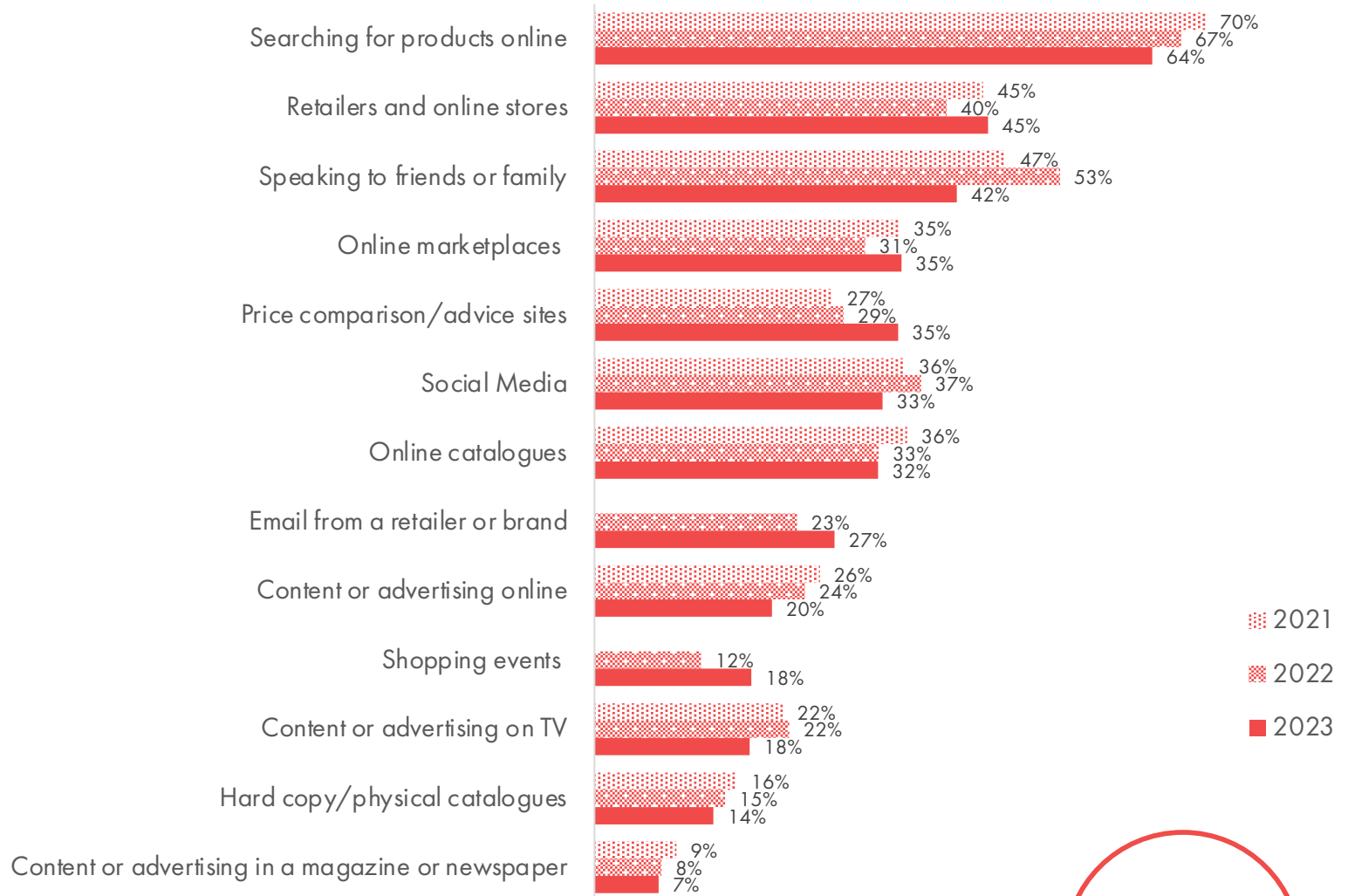
% increased shopping behaviour due to current rises in cost of living



# sources of inspiration and discovery

Search remains key to discovering brands when shopping online.

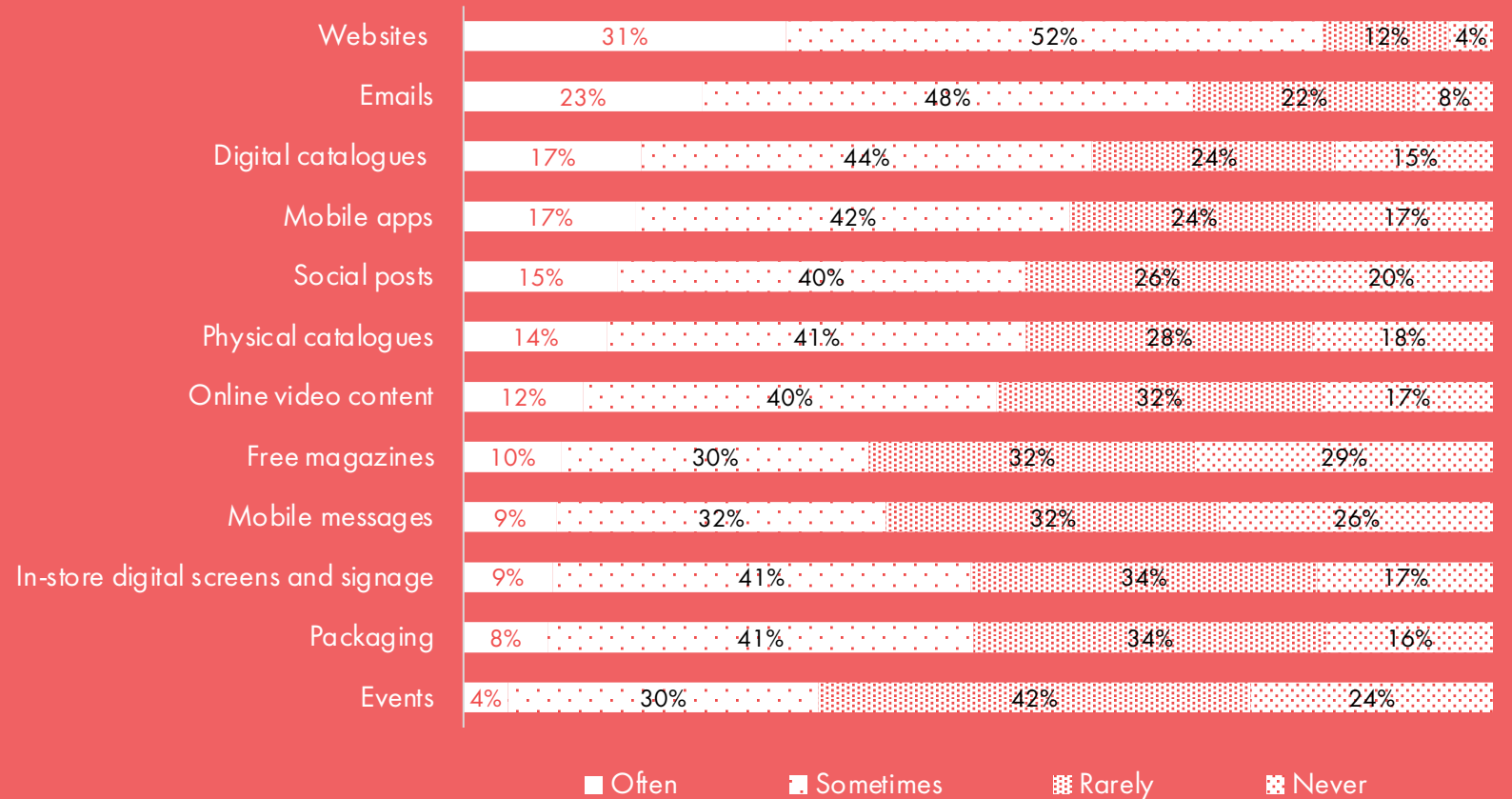
## sources used for product inspiration and discovering brands



# retailer communications consumed

**60%** of online shoppers often read content produced by retailers.

## frequency read content produced and distributed by retailers



# popular retail loyalty, rewards and cashback brands

17.6 million Australians visited a retail voucher, rewards or loyalty program website or app in July 2023.

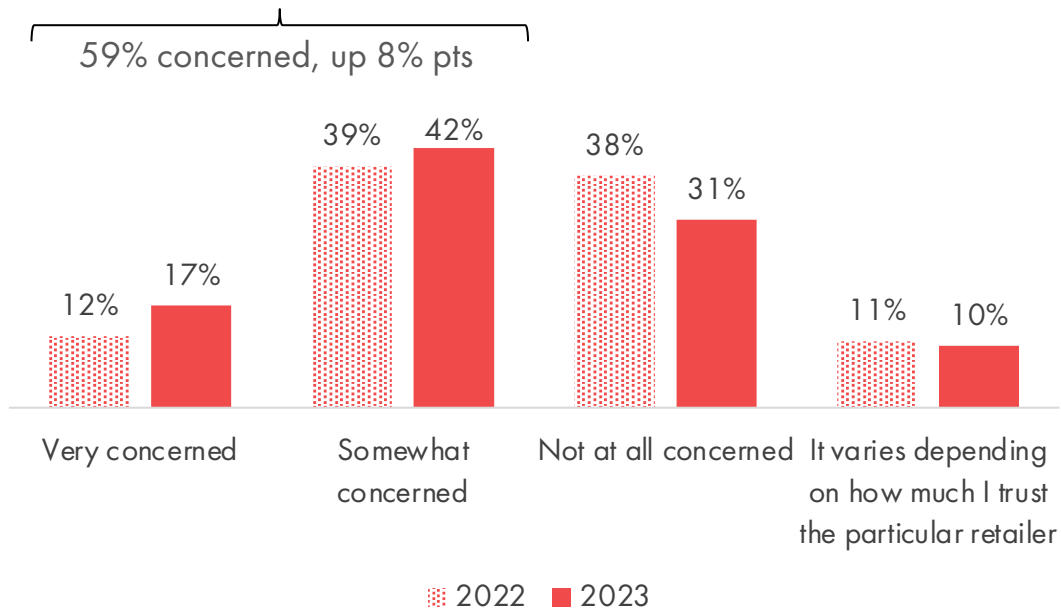


**retail loyalty, rewards and cashback brands**  
audience (000s) aged 14+ in July 2023

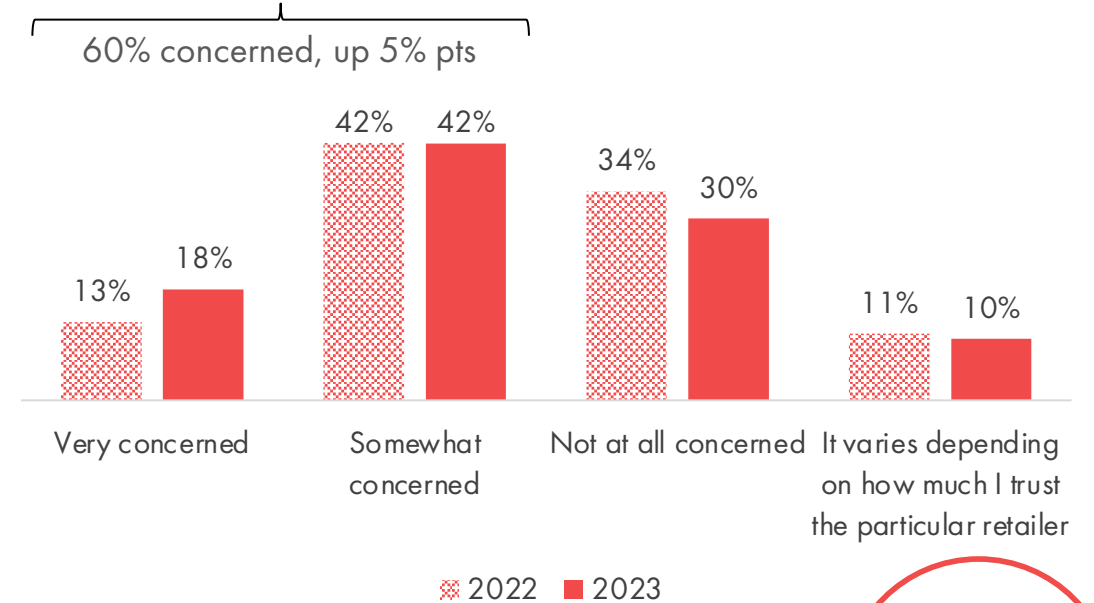
# trust and transparency key for retailers collecting shopper data

Concern with how retailers use shopper data has increased over the last year.  
 6 in 10 online shoppers have some level of concern over how data, collected via loyalty cards and transactions, is used by retailers.  
 A further 10% say concern varies depending on how much they trust the retailer.

level of concern about how retailers use data provided via loyalty cards



level of concern about how retailers use data provided via any transaction

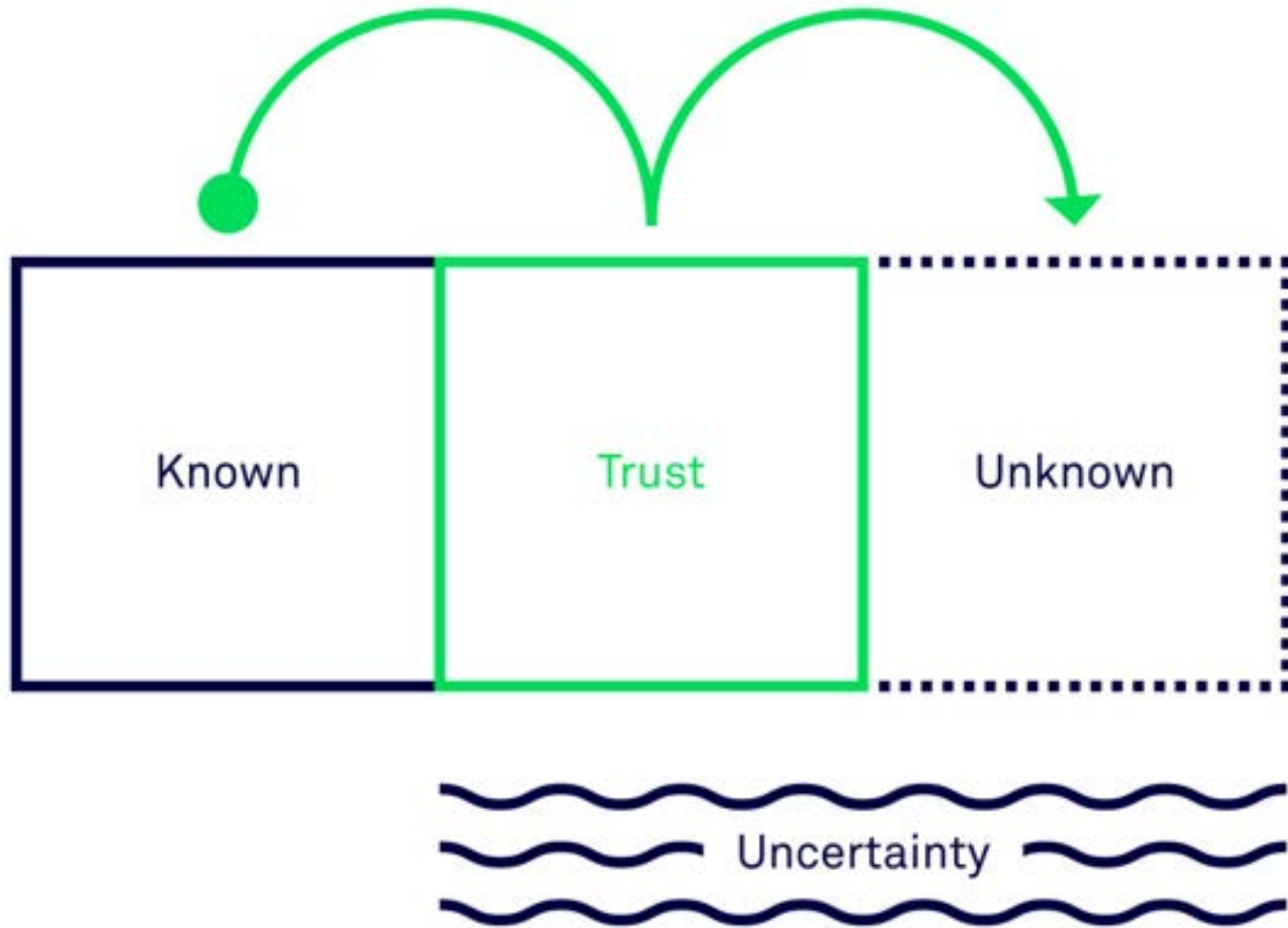


# product, data & privacy update

jonas jaanimagi  
technology lead  
iab australia









# knowns... & known unknowns



1.signal loss



2.responsible addressability

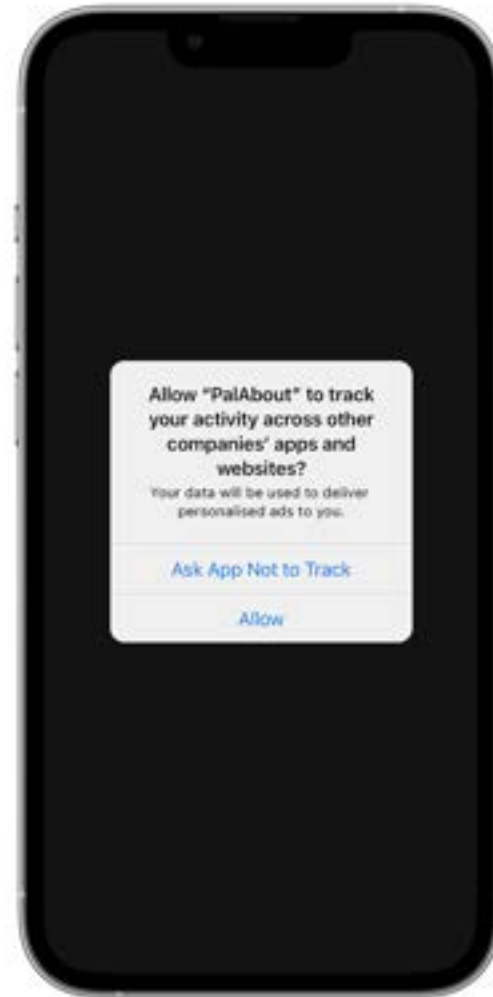
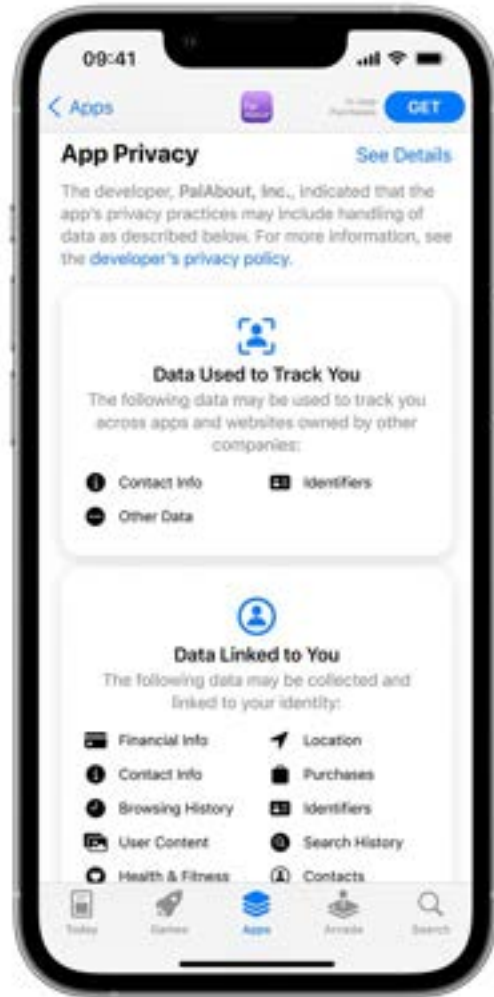


3.known unknowns

**THE END OF  
THIRD-PARTY  
COOKIES  
IS NIGH**



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market.



# the *three* core scenarios

← No linkable user ID available →

## Unlinked 1<sup>st</sup>-party Audiences Advertiser/Publisher data not connected



- Contextual
- Seller-defined audiences
- Private marketplaces

## Browser/OS-linked Audiences No 3<sup>rd</sup>-party tracking



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

Linkable user ID available

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



- User-enabled ID matches
- Clean rooms

june 2021

# contextual targeting handbook.

# *1st party* data handbook.

2022

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**exclusive  
member briefing.** 

# ad tech matters.

## seller defined audiences: an explainer



hosted by

**Jonas Jaanimagi**

TECHNOLOGY LEAD IAB AUSTRALIA



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market.

# identifiers explainer guide.

this document provides a very simple explainer of the various identifiers in the Australia market, including an ID Matrix of the 20 most popular solutions



# identity providers.

Provider	ID Solution	Data Sources	Base Identifiers	Consent Type	Availability and Addressability	Interoperability	Prerequisites
<b>LiveRamp</b>	ATS & RampID	Global publishers & data suppliers	Hashed emails	1st, 2nd & 3rd party	Yes, via all major DSPs & SSPs	Interoperable with most global identifiers	Publishers must have access to user authentications
<b>Lotame</b>	Panorama	Global publishers & data suppliers	Probabilistic & deterministic data	1st, 2nd & 3rd party	Yes	Interoperable with most global identifiers	Ability to sync
<b>Meta</b>	Facebook Custom Audiences	Owned & Operated	Hashed emails, phone numbers & postal addresses	Authenticated & consensual 1st party	Only across owned & operated	TBC	All Custom Audiences customers are vetted with very clear requirements
<b>Near</b>	Proxima	Global publishers + online & offline data partners	Hashed emails, phone numbers and home address	1st, 2nd & 3rd party	Yes, via Near Allspark	Yes, via Near Allspark	Must have a common identifier within any datasets
<b>Oracle Data Cloud</b>	Oracle ID Graph	Global publishers & data suppliers	Probabilistic & deterministic data	1st, 2nd & 3rd party	Yes, via all major DSPs & SSPs	Via Unified ID 2.0	Ability to sync
<b>Unified ID 2.0</b>	Unified ID 2.0	Global publishers	Hashed emails, which are encrypted via a tokenization solution	Authenticated and consensual 1st party	Yes	Interoperable with most global identifiers	Must agree to abide by UID2 ecosystem terms Source code donated by The Trade Desk
<b>Yahoo</b>	ConnectID	Owned & Operated	Hashed emails, tokenized	1st, 2nd & 3rd party	Yes, via Yahoo Preferred Network (prev 'Gemini') + Yahoo DSP & SSP	Interoperable with most global identifiers	Publishers or brand must have mechanism for gathering user emails

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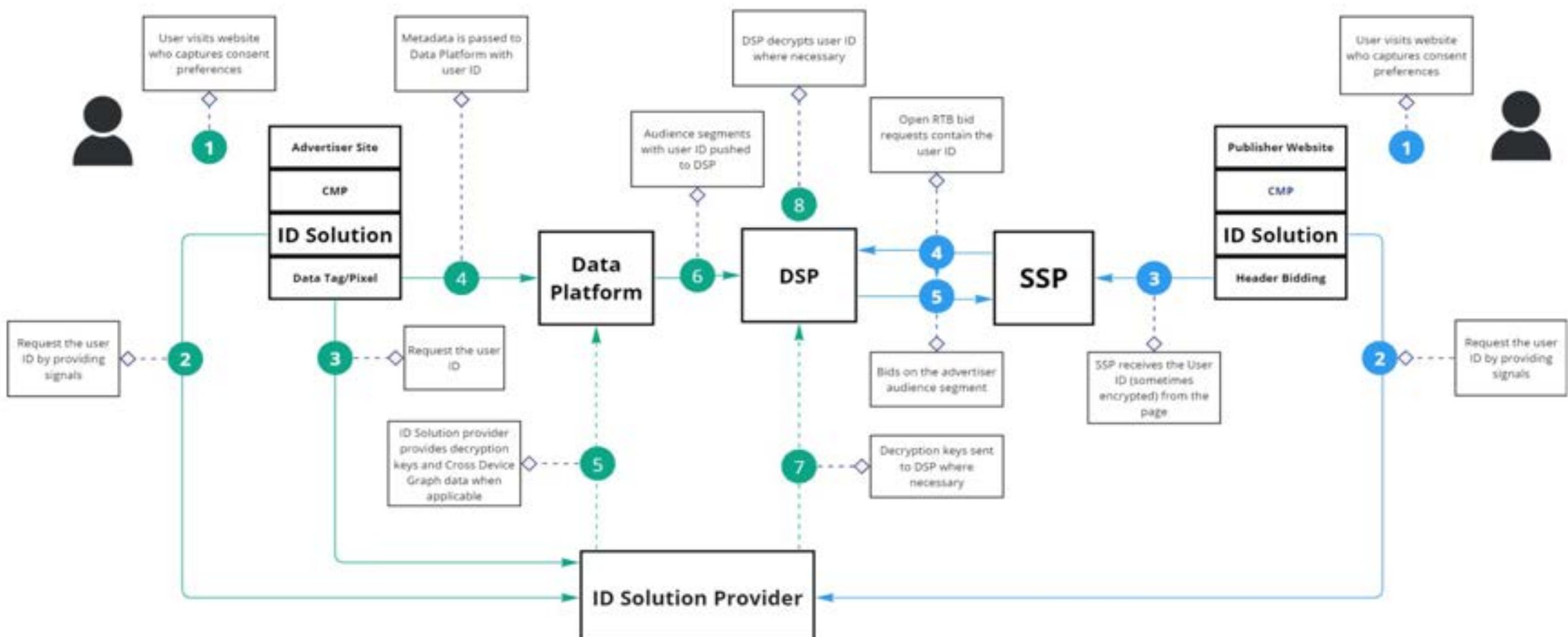
Search



[Home](#) > [Blog Articles](#) > IAB Tech Lab Identity Solutions Guidance

# IAB Tech Lab Identity Solutions Guidance

On October 06, 2023 [ad tech matters](#), [industry standards](#)



2023

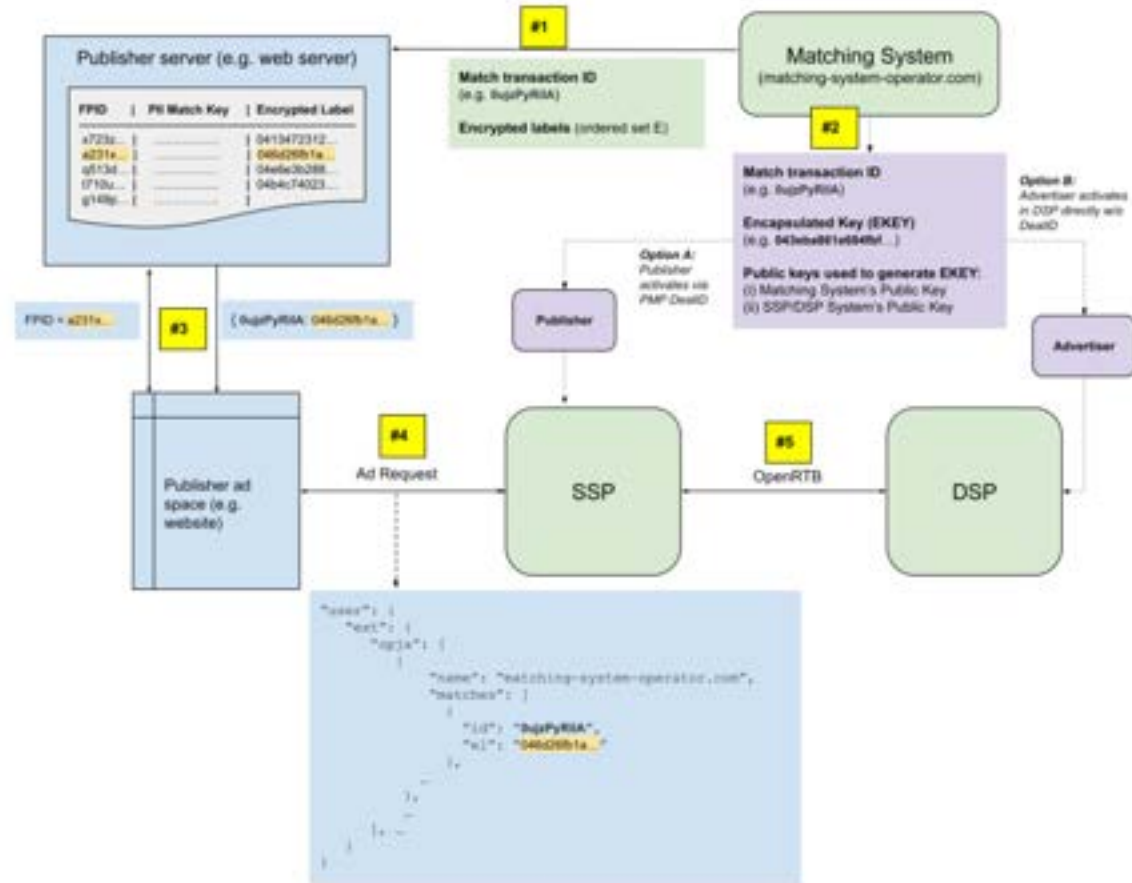
# data collaboration platforms explainer

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# open private join and activation (v1) specs

## clean room interoperability standards




# Settings

Search settings

- You and Google
- Autofill and passwords
- Privacy and security**
- Performance
- Appearance
- Search engine
- Default browser
- On startup
- Languages
- Downloads
- Accessibility

## Ad privacy



- Ad topics**  
Based on your browsing history. This setting is off.
- Site-suggested ads**  
Based on your activity on a site. This setting is off.
- Ad measurement**  
Sites and advertisers can understand how ads perform. This setting is off.



## Third-Party Cookies (3PC) and Testing

- [Opt-in Testing with Labels](#)
- [1% 3PC Deprecation](#)
- [Third-Party Cookie Phase Out](#)



Tags > Cookie Countdown 



## Preparing for the end of third-party cookies

Privacy

Cookie Countdown



Rowan Merewood

October 11, 2023



## Quantitative testing of Google's Privacy Sandbox technologies – CMA guidance to third parties on testing

29 June 2023

### Summary

Google intends to test quantitatively the effectiveness of its Privacy Sandbox technologies between Q4 2023 and Q2 2024 in order to inform the CMA's assessment of the tools. We are also seeking evidence from testing carried out by third party market participants.

In this note, we are seeking to advise ad techs, publishers, and advertisers on how they can test the Privacy Sandbox tools in a way that would contribute to our assessment of the Privacy Sandbox technologies.

It provides details of two preferred approaches to testing, the metrics we would like to capture, and information market participants can submit to the CMA so we can understand the results of their testing.



Overview Transcript

quick look at the simulator where I can get the same full experience that my users would. Here I can select an offer, click Subscribe, and complete the purchase. That's all it takes to build a customized purchase experience to show users all the information they need to make an informed decision. We also know how hard it can be to customize the offers you present, based on the user's purchase history or subscription status. That's why the `SubscriptionStoreView` will automatically determine user eligibility and display the right offer.

The new StoreKit views are the best way to merchandise your in-app purchases. Another important aspect of growing your business is understanding how advertising helps users discover your app. That's why **SKAdNetwork** helps ad networks measure how successfully ad campaigns drive downloads of your app, all while preserving user privacy. In addition to measuring downloads, we know it's important to understand how advertising can bring users back into your app. SKAdNetwork 5 will support measuring re-engagement. In addition to measuring conversions after a user downloads your app, you'll also be able to measure conversions after a user opens your app by tapping on an ad. Version 5 will be available in an iOS release coming later this year. Our new features for in-app purchase and SKAdNetwork will help you grow your business responsibly while respecting user privacy, giving users transparency and peace of mind. Now, back to Darin. Darin: Like our programming language

**ad tech**  
matters.

# summary of recent updates to industry standards

open to all

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**jonas jaanimagi**  
technology lead | **iab australia**



june | 2023

# digital ad fraud handbook

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# privacy act reforms

- **unqualified right to opt-out of targeted advertising**
- **specific protections of the privacy act to de-identified information**
- the definition of personal information
- the definition of targeting
- the fair and reasonable test & legitimate interests
- the proposals in relation to data trading
- children's online privacy code

## Destinations Enabled



Adwords



Amplitude



Drift



Facebook Pixel



Google Analytics

## Website Data Collection Preferences

Segment uses data collected by cookies and javascript libraries to improve your browsing experience, analyze site traffic, deliver personalized advertisements, and increase the overall performance of our site.

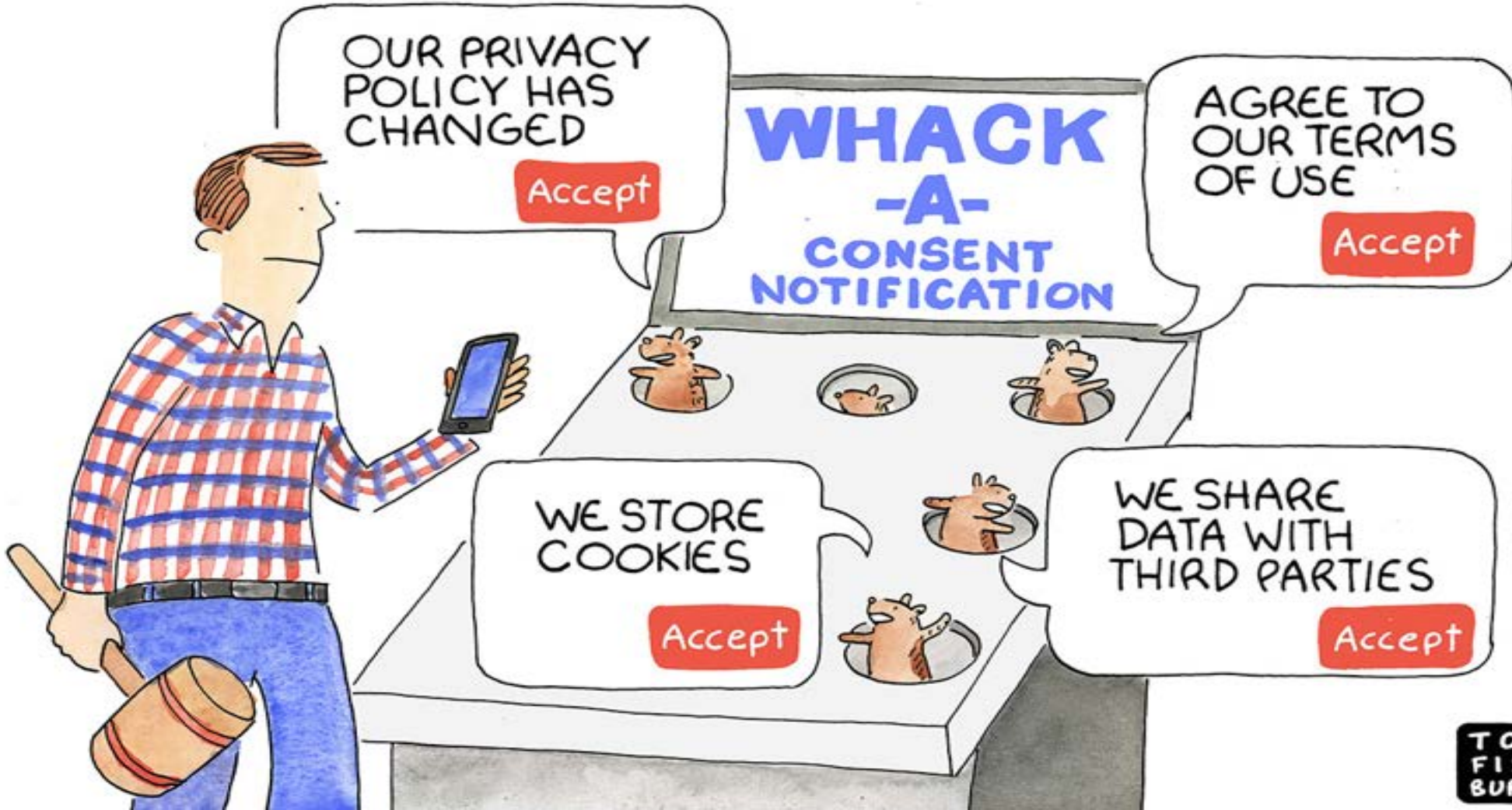
By using our website, you're agreeing to our Website Data Collection Policy as described [here](#). The table below outlines how we use this data by category. To opt out of a category of data collection, select "No" and save your preferences.

Allow	Category	Purpose	Tools
<input type="radio"/> Yes <input checked="" type="radio"/> No	Advertising	To personalize and measure the effectiveness of advertising on our site and other websites.  For example, we may serve you a personalized ad based on the pages you visit on our site.	Adwords, Facebook Pixel
<input type="radio"/> Yes <input checked="" type="radio"/> No	Functional	To monitor the performance of our site and to enhance your browsing experience.  For example, these tools enable you to communicate with us via live chat.	Drift
<input type="radio"/> Yes <input checked="" type="radio"/> No	Marketing & Analytics	To understand user behavior in order to provide you with a more relevant browsing experience or personalize the content on our site.	Amplitude, Google Analytics

Cancel

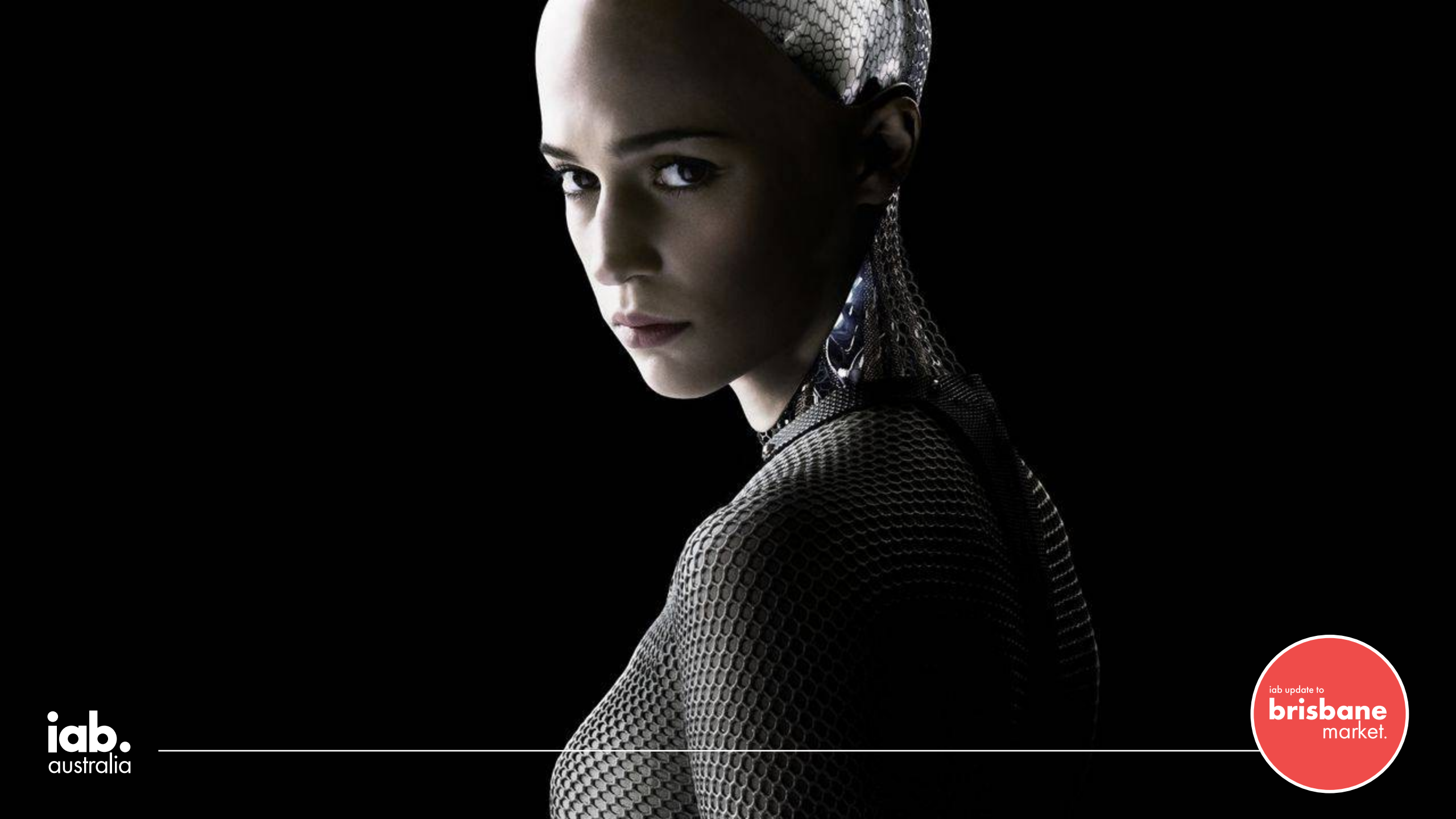
Save





TOM  
FISH  
BURNE





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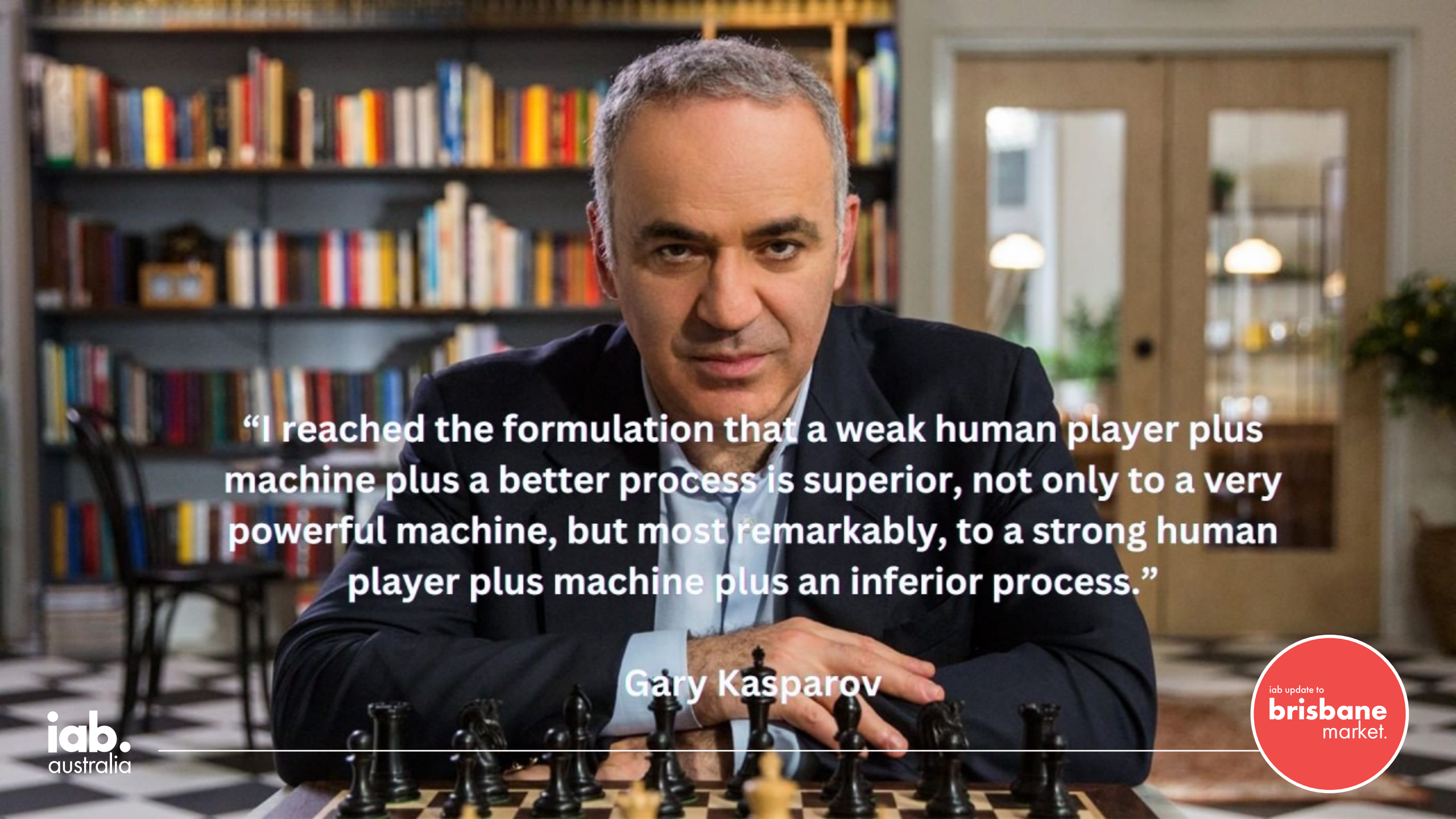


LET'S TRANSFORM OUR ENTIRE BUSINESS  
USING THE GENERATIVE AI I JUST USED  
TO WRITE A POEM ABOUT MY DOG.





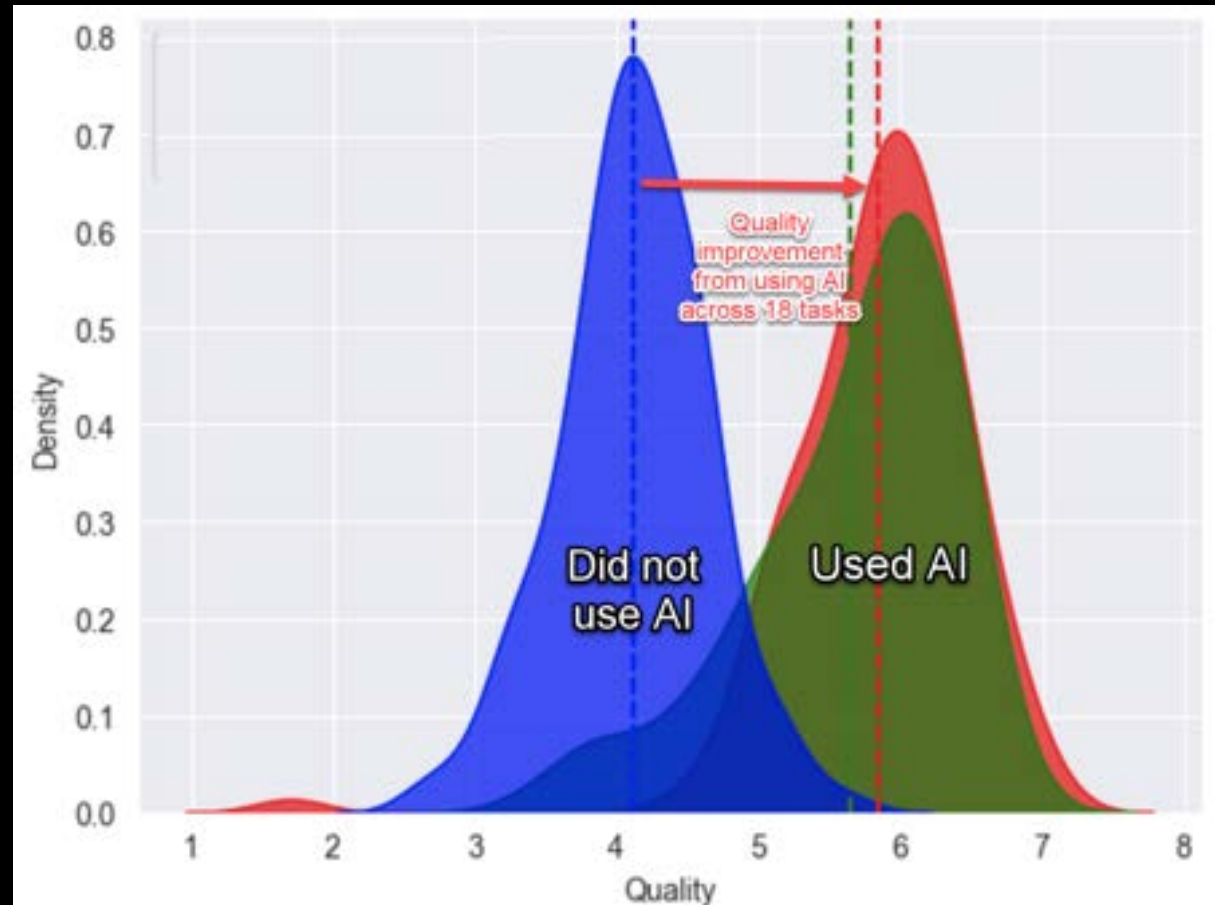


A man with grey hair, wearing a dark suit jacket over a light blue shirt, is seated at a chessboard. He is looking directly at the camera with a serious expression. The chessboard is in the foreground, with several pieces visible. Behind him is a large bookshelf filled with books of various colors. In the background, there is a doorway leading to another room with a lamp and a plant.

**“I reached the formulation that a weak human player plus machine plus a better process is superior, not only to a very powerful machine, but most remarkably, to a strong human player plus machine plus an inferior process.”**

**Gary Kasparov**

**Distribution of output quality across all the tasks. The blue group did not use AI, the green and red groups used AI & the red group got some additional training on how to use AI.**







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**brisbane**  
market.

# Clickbait style headline

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Ad

Ad

Ad

Ad

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea.

Ad

Ad

Ad



member q&a

# ai in digital advertising

**andy houstoun**

chief commercial officer

**crimtan**



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**brisbane**  
market.



## Actions

- Server power
- Device power
- Data transmission
- Content production
- Ad production
- Ad delivery
- Content and ad consumption

## Programmatic Supply Chain

- Consumers
- Publishers
- SSPs
- Ad servers
- Verification partners
- DMPs
- DSPs
- Agencies
- Brands



## HOW EMISSIONS SOURCES VARY BY PUBLISHER

Breaking out the impression level numbers by other dimensions, like region or publisher, shows the importance of having a robust data set.

For the report, we selected 5 of the top 50 news publishers (by traffic) in the US, and 5 in the UK, and mapped out their ad impression emissions. Even among popular sites in the same category, carbon footprints are unique to the publisher.



Ad Selection



Creative Distribution

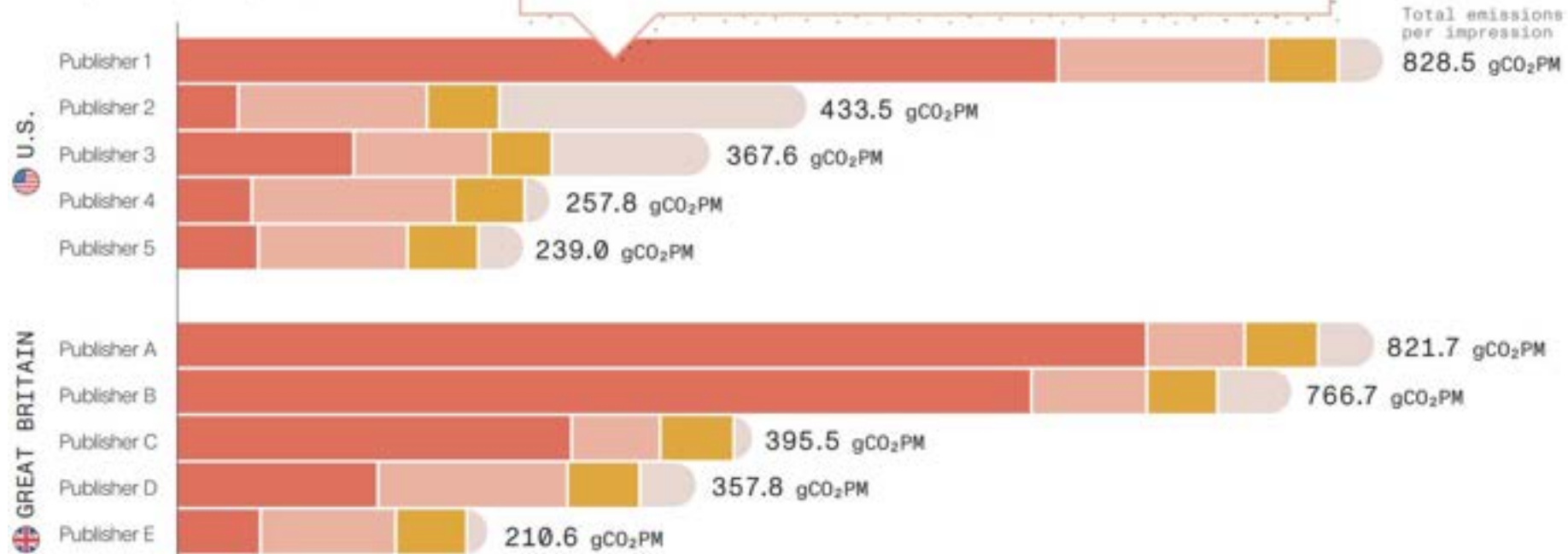


Media Distribution



Consumer Device

Emissions also vary by **publisher and region**. More granular emissions data is more accurate data. Better data makes it easier to find partners or processes that are high emissions sources.



industry briefing

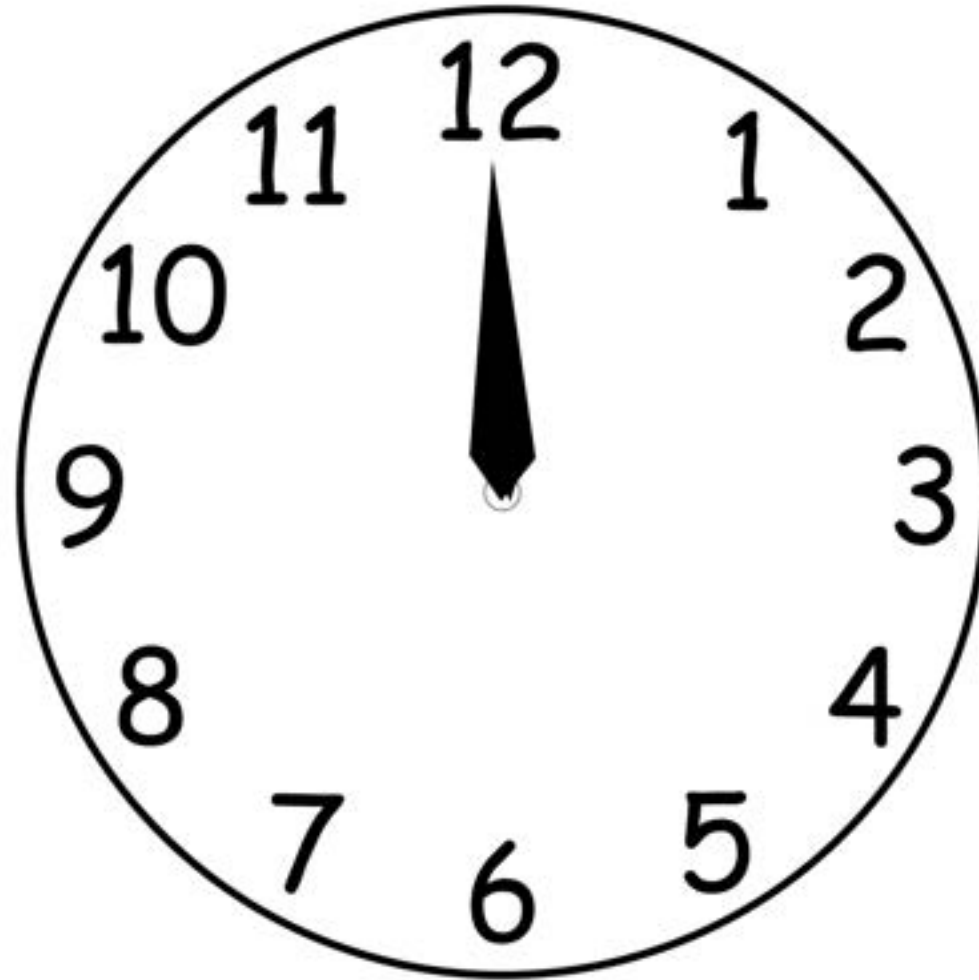
# sustainability in digital advertising

initial best practices  
& recommendations

jonas jaanimagi  
technology lead  
iab australia



**iab.**  
australia





THERE IS ALWAYS HOPE



# how to best engage with us as a member.

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

# iab resources

**ecommerce  
report**



**data  
collaborations  
explainer**



**ad fraud  
handbook**

