We can still save the world: future-proofing our industry and driving sustained growth

Remember that scene in The Exorcist where a demonically-possessed Linda Blair’s head spins around 360 degrees as she spits out profane blasphemies? If you’re like me, that condition has a name: Everyday. It wasn’t so long ago that digital technologies were being hailed as the saviors of all the world’s ills. Internet apps made micropayments available to Third World entrepreneurs, enabled democratic uprisings to topple dictators, powered the #MeToo movement, channeled small donors at scale to upset political candidates, and enabled children to pay for their college educations by launching global video influencer networks on their smartphones. Fast forward to 2020, and these same apps are deemed responsible for bad jobs in the gig economy, revenge porn, fake news, resurgent global fascism, epidemics of credit-card hacks, and the evaporation of privacy. No wonder that every day I — and most media, marketing, and advertising professionals, I suspect — spit profane blasphemies while our heads spin! So what’s the story? IAB Members — we were foolish to believe that as marketing, media, and advertising professionals, we could save the world, have fun, and make money at the same time? Are you doing God’s work, or Beelzebub’s? It’s not an idle question. And there’s no turning back. What we do as marketers in the next 12 months will profoundly shape the future of our industry. The past decade has seen the media landscape change more than in the previous century. In January 2010, Netflix was still delivering movies in red envelopes via snail mail, Facebook didn’t have mobile apps, nobody knew who Alexa and Siri were, and the revenue for internet advertising was $22.7 billion. Ten years ago, roughly one in five Americans had mobile phones, Mary Meeker’s annual Internet Trends Report was a mere 49 slides long, and digital media was much the same as it had been since the dawn of the commercial internet in 1996. Over the past decade, the foundation of the modern digital media ecosystem would take hold and begin a major transformation that will set its course for the next decade. Fast forward to 2020, and today more than 5 billion people own mobile phones around the globe, over 4 million apps are available for download, and well over half of all internet traffic is mobile. Mary Meeker’s much-anticipated trends report? Now 334 pages and counting. It’s truly astonishing what can happen in just 10 years. In the last 10 years, we’ve also seen the rise of advertising exchanges, artificial intelligence in marketing, automated data-driven advertising, and over-the-top (OTT) devices and streaming networks that are taking over America’s living rooms. We’ve also seen the rise of a new growth engine we call the direct brand economy built on digital media. These companies are challenging incumbent brands by using digital technology to create value through lower barrier, capital-flexible, leased or rented supply chains, low-cost targeted digital media, and using data for direct 1:1 relationships with consumers. What unites all these innovations and underpins our now $100+ billion-a-year industry is one thing: data. Data is the oil of the 21st century and the lifeblood of all successful brands, publishers, and marketers. The amount of data companies collect and the ways in which marketers use it is only set to accelerate in the next 10 years and IAB is well-positioned to help shape our collective data-driven future. As AI, 5G, programmatic, and an alphabet soup of other new data-driven technologies continue to fuel the industry, our future selves will barely recognize 2020 ten years from now. We are at the very beginning of this new tech revolution and the possibilities are endless. But it’s up to us to use the next 10 years to build a future we want to live in. It’s time for our industry to embrace transparency about what data we’re collecting and why. We need to give consumers control to decide what to share and not share. We need to learn in and make sure we get our governance right as new technologies proliferate. And we need to have ethics built into our thinking around best practices. We all need to be good stewards of data in how we use and protect it and most of all maintain trust with the consumer. In 2020, IAB is investing in efforts to help our members and the industry navigate this rapidly evolving landscape with research around the state of data and industry trends as well as sharing best practices. We are actively and continuously creating solutions for our members to better understand the role of data for brands including the nuances of in-housing programmatic, using data responsibly to ensure brand and consumer safety, and how to use first-party data to engage with 21st-century consumers. Our newly established Privacy and Compliance Unit which brings together our public policy, legal, and tech teams is navigating regulation and providing solutions such as the CCPA Compliance Framework. And IAB is developing training and playbooks to help companies understand the most profound digital transformations. We are heartened by the commitment from the IAB Board of Directors and our members. Thank you for your ongoing support of this team and our efforts. Now let’s go make the future. Yours respectfully, Patrick Dolan President & CEO, IAB
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2019 HIGHLIGHTS

Empowering the media and marketing industries to thrive in the digital economy is IAB’s mission. We are the only organization that does all of the following under one umbrella:

- Convenes leading peer-to-peer networks across all significant marketing and media functions and segments
- Develops critical thought leadership on consumer and marketing trends
- Develops and publishes essential research on data usage and management
- Designs and instantiates essential supply chain technical standards
- Champions and leads the development of public policies with major government institutions
- Possesses a world-class training and learning organization that upskills stakeholder companies

We have focused these unique capabilities on key initiatives to bring value to our members and move the industry forward.

LEADING INDUSTRY ACTION ON CONSUMER PRIVACY AND DATA PROTECTION

Consumer trust is the lifeblood of digital media and brand loyalty. Whether consumers choose to fund their consumption of digital content and services through advertising or paid subscription models, our industry’s interests are ultimately best served by putting consumer privacy first. To do right for the ad industry, we need to do right by consumers.

Meanwhile, in the U.S. and around the world, policymakers are pushing legislation and regulations that threaten to kill or cripple the digital media industry. Tens of thousands (if not millions) of businesses that collect data about consumers online risk crushing fines if they can’t comply.

Our work isn’t finished with CCPA either. To respond to member companies’ need for a uniform national privacy standard, IAB worked with a coalition of top trade organizations and companies to launch Privacy for America — a first-of-its kind industry initiative — to pass comprehensive privacy legislation in the U.S. Working with world-renowned privacy experts, Privacy for America developed a comprehensive new framework for nationwide privacy legislation that will fundamentally change the way consumer privacy and security are protected in this country.

IAB’s work in the U.S. Congress has also been steady since the gathering privacy storm began in Washington years ago, and the need for a national privacy standard has never been greater. In its first privacy hearings of the 116th Congress, IAB was the only organization that focused on the need for a national privacy standard and brought together all significant marketing and media industries. Tens of thousands (if not millions) of businesses that collect data about consumers online risk crushing fines if they can’t comply.

The gathering storm began in Washington years ago, and the need for a national privacy standard has never been greater. Despite the intense efforts of consumer groups, businesses that collect data about consumers online risk crushing fines if they can’t comply.

IAB Influence: Consumer Privacy, Public Policy, and Legal

Leading Consumer Privacy Efforts in a Wildly Volatile Regulatory Environment

The Direct-to-Consumer Brand Landscape: Thriving in the New Direct Brand Economy

Leading Conversations, Building Relationships & Making Marketplaces

IAB Centers of Excellence

Data Center of Excellence: Driving Radical Transparency and Accountability in Data

Mobile Marketing Center of Excellence: Best-in-Class Mobile Marketing With Consumers at the Center

Digital Video Center of Excellence: Spurring Growth in a Rapidly Evolving Cross-Screen Video Landscape

IAB Tech Lab: Global Standards to Drive Growth and Innovation

IAB Global Network: Supporting Global Growth and Technology Standards

IAB Learning & Development: World Class Training and Learning for a Dynamic Ecosystem

IAB in the News

2020 Upcoming Events

Empowering and Connecting IAB Members

2019 Committees & Councils

Investing in Industry Growth and Our Members’ Success

Who We Are

2019 HIGHLIGHTS
only entity called to testify in both the House and Senate hearings on online privacy, at which we laid out the need for a new federal privacy law. IAB CEO, Randall Rothenberg, highlighted the risk and unintended consequences that could result from ill-conceived legislation that doesn’t recognize consumer privacy and security as a key foundational requirement for doing business in the modern economy. Members of Congress expressed bipartisan support for a new privacy law and discussed the burdens that small and medium-sized companies could face from onerous compliance requirements.

Randall Rothenberg, Chief Executive Officer, IAB; Sir Martin Sorrell, Executive Chairman, S4Capital; Pete Kim, Chief Executive Officer, MightyHive, 2019 IAB Annual Leadership Meeting

To help members comply with new international legislation, IAB has worked with our members to facilitate growth in video platforms, bringing together the segment’s leadership through the Digital Video Center of Excellence and driving sales through the IAB NewFronts marketplace platform. Streaming video and audio content (also a major growth area according to the IAB/ PwC report) are emerging as the main formats in which people are consuming media.

To help our members and the industry discover best-in-class digital video creative, the IAB Digital Content NewFronts and IAB NewFronts West play a powerful role connecting buyers and sellers. Conﬁrming the importance of the event as a catalyst for media buying decisions, 50% of all ad buyers surveyed at NewFronts plan to increase their advanced TV spend in the next 12 months, with half reporting increases in OTT.

To help prioritize and solve industry-wide issues in the video space, each summer, the Digital Video Center hosts the Annual Video Leadership Summit, an invitation-only meeting that gathers leading industry stakeholders to address the key problems facing the video industry. This year’s focus was Showdown in the Streaming Sphere, the battle for consumer’s attention that’s driving the launch of an affiliated platform. According to the IAB/PwC 2019 half-year Internet Advertising Revenue Report, video advertising was a major contributor to growth, with spend climbing 34% year-over-year to $9.5 billion of a record-breaking $58 billion in total U.S. digital advertising revenues for the first six months of 2019.

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And, to introduce brands and media buyers to the latest in original digital audio programming, the sold-out IAB Podcast Upfront 2019 in New York in September was a one-day marketplace designed for advertisers and media buyers to preview the latest in innovative podcast programming from some of the biggest names in the digital audio arena.

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2019 was a historic year for the digital advertising industry, as policymakers in the U.S., Europe, and around the world examined industry practices to pass new data privacy regulation. The costs of CCPA and GDPR are starting to get real and be measured, and companies big and small now have a real sense of what’s at stake. Amid this unprecedented scrutiny, the IAB Privacy & Compliance Unit combines IAB’s Legal, Policy, and Tech Lab expertise to help member companies navigate the new regulatory landscape and advocate before state legislatures and the U.S. Congress. Through our combination of technical expertise, industry research, and legal and policy acumen, IAB played a unique role in helping policymakers as they craft new rules of the road.

PROACTIVELY DRIVING TOWARDS A FEDERAL PRIVACY LAW

Over two consecutive days of testimony before the House and Senate, IAB’s Randall Rothenberg and Dave Grimaldi urged Congress to pass legislation to create a federal regulatory framework around privacy that will protect consumers and avoid the risk of a patchwork of conflicting and damaging state laws.

IAB took a leading role in calling for clear prohibitions of certain data practices, and, in doing so, demonstrated a commitment to protecting all American citizens. As a result, IAB was a respected and trusted voice in Congress in 2019, and IAB testimony laid the groundwork for the launch of Privacy for America.

LAUNCH OF PRIVACY FOR AMERICA

To build the case for a uniform national privacy standard, IAB worked with a coalition of trade organizations and companies to launch Privacy for America—a cross-sectoral industry initiative to pass comprehensive privacy legislation in the U.S. Working in partnership with world-renowned privacy experts, Privacy for America developed a comprehensive new framework for nationwide privacy legislation that would fundamentally change the way consumer privacy and security are protected in this country.

CCPA READINESS

To help businesses comply with the complex California legislation, and to promote the principles of transparency, accountability, and choice that are the basis of the California Consumer Privacy Act (CCPA), IAB released the IAB CCPA Compliance Framework for Publishers & Technology Companies, in 2019 ahead of the 1/1/2020 legislation effective date. The IAB Privacy & Compliance Unit has brought together cross-functional legal, public policy, and technical expertise from IAB and the IAB Tech Lab, and gathered industry stakeholders to develop the CCPA Compliance Framework, Limited Service Provider Agreement, and tech specs to help companies meet the requirements of CCPA. The Framework provides consumers with greater clarity and control over the use of their data.

IAB is advocating for a federal level data privacy law to avoid a patchwork of state laws on consumer privacy, but that will take time. In the meantime, IAB and IAB Tech Lab have been helping our member companies adapt to the new regulatory landscape by getting ready and offering educational support to encourage rapid marketplace compliance and adoption of the CCPA Compliance Framework. IAB hosted two Legal Summits and a series of webinars for members and brands, gathering 1,000 participants to learn about CCPA, GDPR, Congress, and More. How IAB Helps You Navigate the New Regulatory and Privacy Landscape to help prepare for the impact of CCPA, GDPR, and other regulations at the state, federal, and global level. IAB has been a strong advocate for increasing consumer trust and transparency in the digital media and marketing landscape for more than 20 years, and this is another example of our commitment. IAB has corralled legal and public policy experts, as well as some of the best and brightest in ad technology, to create a critical tool in meeting CCPA’s stringent guidelines for the benefit of both the industry and the consumers it serves.

ADVOCACY ACROSS THE STATES

Following the passage of CCPA, IAB accurately predicted that many other state legislatures would propose privacy legislation of their own. In 2019, IAB helped educate local lawmakers on the intricacies of data privacy law to craft effective laws that differentiate between good and bad data practices, but avoid unintentionally inhibiting legitimate and privacy-mindful digital advertising practices. Through letter writing campaigns, member fly-ins, and many individual meetings with key lawmakers, IAB worked on behalf of our members in California, Washington, Texas, Nevada, and New Jersey, among other states.

The IAB Public Policy Office has also coordinated a global policy landscape series of webinars for members and brands, gathering 1,000 participants to learn about CCPA, GDPR, Congress, and More. How IAB Helps You Navigate the New Regulatory and Privacy Landscape to help prepare for the impact of CCPA, GDPR, and other regulations at the state, federal, and global level. IAB has been a strong advocate for increasing consumer trust and transparency in the digital media and marketing landscape for more than 20 years, and this is another example of our commitment. IAB has corralled legal and public policy experts, as well as some of the best and brightest in ad technology, to create a critical tool in meeting CCPA’s stringent guidelines for the benefit of both the industry and the consumers it serves.

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A IAB, we firmly believe that what helps one set of stakeholders in the ecosystem helps everyone. For instance, all companies benefit from consistent consumer privacy regulation, reliable terminology, consumer-elevating community marketing, and OTT advertising.

As these capabilities must be resident across the marketing-media ecosystem, we opened our membership to brands and now have over 120 brand members. Having brands in the room elevates the conversation with publishers, platforms, and tech companies. IAB is an expertise-infused big tent, and we believe all companies will benefit from brand membership.

IAB’s biggest gathering of direct brands, with over 1,000 attendees, the sold-out IAB Annual Leadership Meeting (ALM) in February 2019 in Phoenix, over 1,100 brand marketers, publishers, and digital media and advertising leaders convened to explore the Theory of Revolution: Sparking Growth in the Direct Brand Economy. How to Build a 21st Century Brand was released at the event, the second version of the IAB Direct Brand Economy report, which provides an in-depth illustration and analysis of how direct brands are driving a tremendous transformation in the way consumer goods and services are created, marketed, and sold. The IAB 250: Direct Brands to Watch were also announced at ALM, based on a first-of-its-kind analysis pinpointing the most important direct brands to watch in the U.S. economy.

To help our members thrive in this fast-changing marketing landscape, IAB explored the effect of direct brand companies on the video landscape and innovative media at the IAB NewFronts West in Los Angeles, and the effect of influencers in the direct brand economy at the Influencer/UGC Marketing Day. The world’s largest gathering of direct brands, with over 1,000 attendees, the second annual IAB Direct Brand Summit (DBS) offered a unique opportunity to experience many points of view from the people building and leading the direct brand economy. At the Summit, IAB revealed some surprising findings in the Direct Brands: Media & Customer Acquisition Study: In sharp contrast to the popular belief that direct brands focus their marketing around social, the data shows that direct brands are leveraging all media, including display, social, video, digital out-of-home (DOOH), and audio, and their offline media spend is bigger than most would think.

Over the past few years, we have witnessed a record rise of direct brands – disruptor companies that create value through direct relationships with consumers. These direct brands have forever changed the marketing landscape, and all brands, especially incumbents, must understand the capabilities of disruptors to compete.

To help our entire industry and digital ecosystem navigate this dynamic direct brand landscape, IAB championed a raft of initiatives and events in 2019. At the sold-out IAB Annual Leadership Meeting (ALM) in February 2019 in Phoenix, over 1,100 brand marketers, publishers, and digital media and advertising leaders convened to explore the Theory of Revolution: Sparking Growth in the Direct Brand Economy. How to Build a 21st Century Brand was released at the event, the second version of the IAB Direct Brand Economy report, which provides an in-depth illustration and analysis of how direct brands are driving a tremendous transformation in the way consumer goods and services are created, marketed, and sold. The IAB 250: Direct Brands to Watch were also announced at ALM, based on a first-of-its-kind analysis pinpointing the most important direct brands to watch in the U.S. economy.

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The Direct Brands: Founders Benchmark Study revealed that direct brands focus on profitability and customer satisfaction ahead of market share, and 96% of direct-to-consumer brands report that they are already profitable. The findings also indicate that the vast majority of disruptor brands are building institutions to last.

To show how modern marketers are using data, mobile, and video-driven marketing strategies to increase consumer engagement and accelerate business growth, the IAB Data, Mobile, and Digital Video Centers of Excellence joined forces to produce the IAB NexGen Marketing Conference. To continue the conversation online and off, IAB offered a series of brand council meetings, peer-to-peer networking opportunities, and founders’ insights in a video series throughout the year.

The challenges and opportunities that direct-to-consumer companies have created are ongoing subjects of discussion with our members and were also the focus of a research paper: Pivoting to Growth: Selling Advertising and Marketing in the Direct Brand Economy. Key suggestions and takeaways include knowing the brand’s mission and product story, and how they engage with their target consumer; using data, real-time reporting, and attribution to help them personalize, respond to, and understand their customers more holistically.

Who are direct brand consumers, how big is the market, and what drives the consumer decision process? To answer these and other pressing questions, IAB produced landmark research about this dynamic landscape called the Disrupting Brand Preference Study, which was released at VidCon in July. It shows that direct brand shoppers comprise 48% of all U.S. consumers. They are younger than incumbent brand-only shoppers, with 84% under 54 years old, and are likely to have a household income of more than $75,000.

In December 2019, IAB released the Legal Guide for Direct Brands, which offers a concise overview of legal issues often confronted by companies, particularly direct brands, and helps companies navigate the legal implications of direct connections to consumers. The guide covers such thorny issues as why founder and equity agreements are vital for direct brands including the documents necessary for such investment transactions, and the essentials of privacy, advertising, and marketing law for companies that compete with them.
LEADING CONVERSATIONS, BUILDING RELATIONSHIPS, AND MAKING MARKETPLACES

IAB plays a crucial role in convening thought leaders and creating marketplaces. At events like the IAB Digital Content NewFronts and NewFronts West, the IAB Podcast Upfront, and Audio Days, IAB works to spur the interactive industry toward truly inspiring creative. These events play a powerful role connecting buyers and sellers of digital video and emerging media. The 2019 IAB NexGen Marketing Conference and the 2nd annual IAB Direct Brand Summit provided insights from and for direct brands. And agenda-setting events such as the IAB Video Leadership Summit and the IAB Annual Leadership Meeting provided discussion platforms, thought leadership, and inspiring insights.

In 2019, we also brought more networking opportunities to our members with IAB@Cannes Lions, IAB@VidCon, the IAB Cross-Cultural Marketing Day, Women Visionaries breakfasts and town halls, and our Brand Council events.

IAB continues to be the leading convening force for the digital industry to bring publishers, platforms, and brands to solve industry challenges. As platform and publisher interdependency continues to grow, IAB facilitates high-level conversations between key parties and members throughout the year.
IAB CENTERS OF EXCELLENCE

IAB Centers of Excellence provide leadership, best practices, and research for the continued growth of the interactive advertising industry through peer-to-peer and expert networks.

GUIDE TO NAVIGATING THE CHILDREN’S ONLINE PRIVACY PROTECTION ACT (COPPA)

Children are now one of the fastest growing online audiences. UNICEF reports more than 175,000 kids globally go online for the first time every day. This IAB Guide explains COPPA, provides recommendations to brands, advertising technology providers, and publishers, and acts as a resource for the media industry.

THE STATE OF DATA

To better understand and quantify audience data applications among digital marketing practitioners, this study shows how U.S. companies are accelerating their spending on third-party audience data for advertising and marketing efforts. Spoiler alert: In 2019, American companies are expected to spend nearly $19.2 billion on the acquisition of audience data and on solutions—a 17.5% increase from the prior year. The report also shows practitioners how to benchmark their current efforts and plan for the year ahead.

A MARKETER’S GUIDE TO DEFINING THE DATA STACK

An in-depth educational examination into how both rising direct brands and mainstay traditional brands can identify their current place in the data ecosystem, this IAB whitepaper presents an assessment criteria for understanding your current datasets, and how they relate to one another and considers the levels of online, offline, and owned data to determine where your brand falls on the custom data matrix.

IAB DATA ROCKSTARS AWARDS

To raise awareness and visibility of the great work done by data industry practitioners the IAB Data Center of Excellence and IAB Learning & Development honored key members as recipients of the 2019 IAB Data Rockstar and Rising Star Awards. IAB brought together 200+ industry professionals to connect and celebrate the success of their peers.

IAB DATA CENTER OF EXCELLENCE

DRIVING RADICAL TRANSPARENCY AND ACCOUNTABILITY IN DATA

Direct-to-consumer brands are fueled by data, devoted to performance and developing new ways of doing business. Key efforts for the IAB Data Center of Excellence in 2019 focused on helping bring programmatic in-house and supporting key research to foster a better understanding of the current state of data in the interactive landscape.

OTHER 2019 INITIATIVES INCLUDED:

• Artificial Intelligence in Marketing
• Growing Programmatic DOOH: Opportunities and Challenges Benchmark Study
• Programmatic In-Housing: Building Internal Capabilities
• The Essential Guide to Marketing Mix Modeling (MMM) and Multi-Touch Attribution (MTA)

Visit iab.com/data for more information.

2019 IAB DATA CENTER OF EXCELLENCE BOARD

Eric Danetz, Accuweather
Karen Caufield, Axaciom
Matthew Groner, AdTheorent
Andy Johnson, ALC
Dana Tunks, Broadsign
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Jan Wright, Equifax
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Jeremy Hilaveck, IBM Watson Advertising
Rebecca Stone, Liveramp
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Mark K. Wright, MediaMath
Michael Scherer, Neustar
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Jay Habegger, ownerIQ
Gunnard Johnson, Pinterest
Kristoffer Nelson, Srax
David Danziger, The Trade Desk
Jay Webster, Valassis
Julie Bernard, Verve
Tim Barnes, Xandr

2019 IAB DATA ROCKSTARS

2019 DATA ROCKSTARS

Donna Hamilton, Alliant
Ross Jenkins, IPG Mediabrands
Kevin Moeller, PepsiCo
Emma Pop, Starcom U.S.
Isaac Quiroga, Mattel
Jeff Sporn, Equifax
Charles Wolrich, Hearst Data Studio

2019 DATA RISING STARS

Niureen Al-Basha, Yieldmo
Danielle Dzbanek, MediaMath

Visit iab.com/data for more information.

Niureen Al-Basha, Data Engineer, Yieldmo and the Yieldmo team at the 2019 IAB Data Rockstar Awards

Joe Pilla, Director, Data & Automation, Data Center of Excellence, Orchid Richardson, Vice President & Managing Director, Data Center of Excellence, Kevin Moeller, Head of Media Insights & Analytics, PepsiCo, 2019 IAB Data Rockstar Awards
WHERE DO INFLUENCERS AND UGC Fit in the Purchase Funnel?

Influencers and user-generated content (UGC) have become crucial components of the purchase funnel. They help marketers understand consumer trends and preferences, driving informed marketing decisions. With the rise of social and messaging platforms, UGC has significantly increased in marketing and advertising. The IAB and its committees have been at the forefront of these developments, providing best practices and guidelines for marketers.

PLAYABLE ADS FOR BRANDS

To help brands embrace the potential of playable ads, the IAB Games Committee created a guide. These ads have the potential to drive quantifiable business results and eliminate misconceptions in the industry. The guide helps brands understand the value of playable ads and how to effectively integrate them into their advertising strategies.

IAB LOCATION-BASED MARKETING GLOSSARY

An estimated $26.5 billion was spent in 2019 on mobile location-based marketing activities. The IAB Location-Based Marketing Glossary is a valuable resource for brands looking to leverage this growing trend. It defines key terms, explains how location-based marketing can benefit brands, and provides guidance on how to implement these strategies effectively.

RECOMMENDATIONS FOR MARKETERS IN A SCREENLESS WORLD

Screenless devices are becoming increasingly important in the consumer landscape. The IAB Audio Committee released a guide to help marketers understand the impact of these devices on audience engagement and advertising performance. This guide provides recommendations for creating effective campaigns in a screenless world.

OTHER 2019 INITIATIVES INCLUDED:

- Native Advertising Playbook 2.0
- Account-Based Marketing in an Omni-Channel World
- Augmented Reality for Marketing Purposes Playbook

Visit iab.com/mobile for more information.

2019 IAB MOBILE MARKETING CENTER OF EXCELLENCE BOARD

Russell LeFevre, Converseant
Dave Madden, EA (Electronic Arts)
Goksu Nebel-Perlman, Facebook
Gilad Elbaz, Factual
Brian Gottesman, Flipboard
Josh Cohen, Foursquare
Chris LaSala, Google
Sheri Bachstein, IBM Watson
Christina Tang-Cuba, Instagram
Ryan Polley, Kargo
Shannon Callies, Microsoft Advertising
Anthony Katsur, Nextstar Digital
David Staas, NineDigital
Evan Ruthchik, Ogury
Nishant Khatri, Pubmatic
Jeff Wesser, Shopify
Ali Rana, Snap Inc.

IAB CENTERS OF EXCELLENCE

Best-in-Class Mobile Marketing with Consumers at the Center
IAB DIGITAL VIDEO CENTER OF EXCELLENCE

SPURRING GROWTH IN A RAPIDLY EVOLVING CROSS-SCREEN VIDEO LANDSCAPE

Publishers are looking to effectively monetize consumer’s seemingly insatiable appetite for video in a brand-safe environment, especially on mobile, and in the fast growing OTT streaming video space. To help our members and the industry discover and participate in best-in-class creative, and to help buyers and planners be smarter about investing in digital video, the Video Center fielded essential new research, tools, marketplaces, and events including:

2019 VIDEO AD SPEND STUDY

Overall the future looks bright for video as advertisers indicated they planned to spend about 23% more on digital video advertising in 2019 with nearly two-thirds (69%) planning to increase spend in advanced TV spend and half reporting increases specifically in over-the-top streaming video. This annual report, released in tandem with the IAB NewFronts, provides key insights on where brands and buyers are focusing their digital video ad spend including specific verticals and categories.

OTT STREAMING VIDEO PLAYBOOK FOR ADVANCED MARKETERS

Designed to educate brands on the fast-moving OTT landscape, this playbook examines the technologies, key terms and definitions, use cases, industry data and offers practical advice on how to leverage the power of OTT streaming video. IAB also released video interviews with industry experts on how they are thinking about the OTT streaming video space in terms of measurement, audience and creative capabilities.

ADVANCED TV MATRIX: A MARKET SNAPSHOT

To simplify and organize the complex and constantly evolving advanced TV landscape, the IAB Digital Video Center released this comprehensive reference guide, which aims to simplify and organize the complex and constantly evolving advanced TV landscape. By placing all types of TV and advanced TV products side by side, buyers and planners can understand the differences and similarities amongst these TV products to determine the best course of action for their brand depending on their marketing objectives, needs, and capabilities.

IAB DATA-DRIVEN VIDEO BEST PRACTICES AND CASE STUDIES

To showcase how data can be used not just to inform targeting, but also actual creative messaging, the Data-Driven Video Best Practices Guide and Case Studies highlight the current state of data-driven video, best practices for implementing these strategies, while highlighting the key consumer signals brands can leverage to create more effective campaigns.

A DAY IN THE LIFE OF VIDEO VIEWERS

Video advertising is affected by the motivations and mindsets a consumer experiences as they make their content viewing choices throughout the day. Released at the 2019 Digital Content NewFronts, this study looks into the different ways consumers watch digital video — going beyond dayparts, demographics and/or personas.

2019 IAB DIGITAL VIDEO CENTER OF EXCELLENCE BOARD

Laflit Balchandani, Adobe
Katie Kuik, CBS
Eric Harris, Cheddar
Philippe Guetion, Crackle
Eden Gorcey, Condé Nast
Travis Howe, Disney
Daniel Brackett,Extreme Reach
Alvin Bowles, Facebook
James Rookie, Freewheel

Brian Albert, Google
(TV/YouTube)
Peter Naylor, Hulu
Anne Frisbie, iHeartMedia
Tal Chalutz, Ingenio
Jodie McAfee, Inscap
Lisa Urtzschneider, Integral

Mike Fisher, MediaMath
Andrew Snyder, Meredith
Mike Reidy, NBC
Anthony Katsur, Nexstar Media
Brian Matthews, NFL
Tom Fochette, Samsung
Ads
Dave Morgan, Simulmedia
Philippe Browning, Snap
Brian Danko, Spotify
Ebonie Newman, Storyful
Bertrand Quesada, Twitter
Adam Lowy, Telaria

POSSIBLE 2019 INITIATIVES INCLUDED:

• Kickstarting Creative Success
• Member Roadshow: Current State of Video Advertising Ecosystem

Visit iab.com/video for more information.

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DATA-DRIVEN VIDEO BEST PRACTICES AND CASE STUDIES

To help prioritize and solve industry-wide issues in the video space, each year in July the Video Center hosts the Annual Video Leadership Summit, an invitation-only meeting that gathers leading industry stakeholders to address the key problems facing the video industry. This year 80+ senior leaders from across the media ecosystem, including top OTT and broadcast companies, top brands, and media buying and creative agencies, gathered to discuss the battle for consumer’s attention that’s playing out with the launch of more and more ad-supported and subscription streaming services as programming, pricing, distribution, and monetization models continue to evolve.

VERNA DE JESUS, Head of TV, streaming, Amazon Advertising

DAVID ROLFE, EVP, Director of Integrated Production, RBCD New York

TRAVIS HOWE, SVP Disney Ad Sales Global Operations, Disney, IAB 2019 Video Leadership Summit

OTHER 2019 INITIATIVES INCLUDED:

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Visit iab.com/video for more information.

PUBLICATIONS

Visit iab.com/video for more information.
ENHANCED GDPR TRANSPARENCY AND CONSENT FRAMEWORK

The IAB Europe Transparency & Consent Framework (TCF) provides a common framework to facilitate compliance with data protection laws for every part of the advertising value chain, from publishers and technology companies to agencies and advertisers. Version 2.0 has been developed under the stewardship of IAB Tech Lab, and based on feedback received in the first 12 months after the General Data Protection Regulation (GDPR) took effect from the market and EU member state data protection authorities (DPAs). Key changes in the new version are even more transparency and control for consumers, greater control for publishers, and enhanced accommodation of GDPR’s “legitimate interest” legal basis for processing personal data.

PROPOSAL FOR ENHANCED ACCOUNTABILITY

The open standards and open architecture of the internet have fueled tremendous innovation and consumer value over the last 20+ years. But some parties have been overly open in exchanging data — causing concerns around consumer privacy, data sharing practices, and security. In September, IAB Tech Lab released a Proposal for Enhanced Accountability which outlines three ideas from our industry for building consumer privacy into the fabric of our ecosystem, and ascertaining real-time, privacy-compliant use of consumer identifiers: an encrypted, revocable token, tied to a joint accountability system, with a controlled container for ad delivery.

DATA TRANSPARENCY STANDARD AND COMPLIANCE PROGRAM

In June, the IAB Tech Lab announced the completion of version 1.0 of its Data Transparency Standard, and the launch of an affiliated Data Transparency Standard Compliance Program, to advance data collection best practices. Similar to manufacturers being required to provide a nutrition label on packaged foods, the standard asks data providers to offer details that inform segment quality, addressing things like segment recency, provenance, and segmentation criteria, and to encourage more informed data usage.

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IAB supports our members’ international agendas by leveraging the strength and collaboration of the IAB Global Network, encompassing nearly 50 IAB organizations across six continents. The international team aims to further the overall mission of IAB and to serve the interactive ad industry globally by advancing global thought leadership, expanding the IAB brand into strategic markets, and encouraging self-regulation and public policy. This year, the IAB Global Network continued to focus its efforts on an issue that profoundly affects the entire media and marketing ecosystem: consumer privacy and regulations.

### IAB LEARNING & DEVELOPMENT

**WORLD-CLASS TRAINING AND LEARNING FOR A DYNAMIC ECOSYSTEM**

As the industry continues to grow, IAB members have showcased a need for additional training to further upskill their organizations and stay ahead of the curve. Some of the main courses offered in 2019 included:

#### INTRODUCTION TO DIRECT BRANDS

Direct-to-consumer brands are disrupting the traditional retail economy, capturing unprecedented market share from legacy category leaders. This online learning course traces the development of direct brands and explains how you and your organization can thrive in the direct brand economy.

#### IAB LEADERSHIP TRAINING: MEDIA SALES

To actively enable the emergence of new strong sales leaders in the industry, the IAB Education Advisory Board, comprised of fourteen top executives in the digital industry, architected a two-day leadership training for media sales.

#### PRIVACY ESSENTIALS

Designed for business professionals, the Privacy Essentials course gives an in-depth introduction to the most comprehensive EU and U.S. privacy laws and how they affect your business and apply to the various players in the digital advertising ecosystem.

#### DIGITAL ADVERTISING ESSENTIALS FOR LAWYERS, POLICY, AND PRIVACY PROFESSIONALS

As privacy and policy continue to be key topics of discussion, this course was designed for lawyers, and public policy professionals looking for a crash course in where an IAB member provides insights on how their organization can thrive in the direct brand economy.

#### AUDIO 360

The first digital audio training of its kind, the IAB Audio 360 course dives into where audio has been, where it’s going, and how advertisers are taking advantage of it for the future.

### SOCIETY OF DIGITAL MEDIA PROFESSIONALS NETWORK

Each month the Learning & Development team hosts an event where an IAB member provides insights on how their organization approaches a particular topic, inciting open discussion where members can share ideas and build relationships.

#### PARTNERSHIP WITH DMI AND 212 NYC

To increase the reach of digital media and marketing training for the interactive industry, IAB Learning & Development has established partnerships with the Digital Marketing Institute (DMI) and 212 NYC, to extend training and certification opportunities directly to their members.
IAB IN THE NEWS

EXCLUSIVE: Interactive Advertising Bureau Unveils The 2019 IAB 250

The IAB Finalizes CCPA Framework As Industry Readies For More Regulators

IAB CEO: programmatic a 'strategic resource' thanks to disruptor brand

IAB: Higher Ad Growth For OTT Platforms, 'Walled Garden' Concerns

IAB’s NewFronts West to Return to L.A. in September 2019

IAB names direct-to-consumer brand to board seat for first time

Targeted TV Advertising Is Taking Off

Brands No Longer Want Your Loyalty. Now They Want Your Love

IAB Tech Lab intros 'nutrition label' program to simplify audience data

Direct-to-consumer disrupts all sectors with new customer journey

Podcasting To Become A Billion-Dollar Ad Business By 2021: IAB-PwC

How Disruptor Brands Are Thriving in Industries Dominated By Giants Like Amazon

Marketers Turn Up Podcast Advertising

IAB Releases CCPA Framework As Privacy Law Deadline Looms

D2Cs: Faster Than Legacy Brands, But Surprisingly Traditional

Meet Sellers.json: It’s Like Ads.txt, But For The Buy Side

IAB Tech Lab releases final version of app-ads.txt to fight mobile app fraud

IAB Tech Lab releases new specs to boost transparency across entire supply chain

For information on sponsoring these events, contact us at events@iab.com
The IAB is an industry organization that empowers the media and marketing industries to thrive in the digital economy. In your capacity as an IAB member, you will:

• Be part of the IAB, an industry association that represents the majority of the digital advertising ecosystem.

• Benefit from the collective knowledge and experience of the IAB’s 500+ member companies, which account for over $100 billion in annual ad revenue.

• Enjoy access to exclusive events, networking opportunities, and resources that help you stay informed and connected.

• Be part of the IAB’s advocacy efforts, which work to shape policies and standards that impact the digital advertising industry.

• Receive updates on the latest developments and trends in digital advertising, as well as insights from industry experts.

If you’re interested in becoming an IAB member or learning more about the benefits of membership, please reach out to us. We look forward to working with you to empower the media and marketing industries to continue to thrive in the digital economy.
2019 COMMITTEES & COUNCILS

DATA CENTER OF EXCELLENCE

Automation Committee
Programmatic Digital-Out-of-Home
Ryan Pogg, Broadside, Co-Chair
Esther Raphael, Intersection Co., Co-Chair

Short-Term vs. Long-Term Profitability
Brandon Beard, The E.W. Scripps Company Co-Chair
Matt Petersen, Outbrain, Co-Chair
Tim Wall, AdLiner, Co-Chair

Data Benchmarks & Activation Committee
Valentina Marastoni-Beiser, Cuebiq, Co-Chair
Michael Tuohy, Eyota, Co-Chair

Children’s Online Privacy Protection Act (COPPA)
Kate O’Loughlin, HeartMedia, Co-Chair
Michael Tuohy, Eyota, Co-Chair

Identity & Audience Data Committee
Julie Bernard, Verve, Co-Chair
Alysa Borsa, Meredith Corporation, Co-Chair
Greg Williams, MediaMath, Co-Chair

Measurement & Attribution Committee
Sable Mi, NetDec/decimal, Co-Chair
Peter Minimum, ipso, Co-Chair

Reconciliation of Marketing Mix Modeling (MMM) & Multi-Touch Attribution (MTA)
Sable Mi, NetDec/decimal, Co-Chair
Peter Minimum, ipso, Co-Chair

Digital Video Glossary Working Group
Stacey Graham, BET Networks, Co-Chair
Nelson Pinero, GroupM, 2019 IAB Cross-Cultural Marketing Day

DIGITAL VIDEO CENTER

Advanced TV Committee
Chris Falckner, Cuebiq, Co-Chair
Doug Fleming, Hulu, Co-Chair

Advanced TV Attribution Working Group
VR/AR Working Group

Digital Video Committee
Jarred Witschonky, CBS Interactive, Co-Chair

Digital Video Glossary Working Group
Jonathan Stringfield, Activision Blizzard Media, Co-Chair

IAB TECH LAB

IAB Tech Lab Council
Ad Product Portfolio Working Group
Blockchain Working Group
CCPA/US Privacy Technical Working Group
Data Transparency Standards Working Group
Digital Video Technical Standards Working Group

MRAID Ads SDK Tester Working Group
OpenData Task Force
OpenDirect Working Group
Open Measurement Working Group
Open Measurement Commit Group
Open Measurement Participant Group
OpenRTB (Real-Time Bidding) Working Group
Product Performance Working Group

OTT (Over-The-Top Video) Technical Working Group
Podcast Technical Working Group

Playables Working Group
Rob Grossberg, TeadsSenso, Co-Chair
William Lee, Facebook, Co-Chair

Local Committee
Kristen Berke, Los Angeles Times Media Group, Co-Chair
Jeanne Brown, Verve, Co-Chair
Brian Czarny, Fastrai, Co-Chair

Location-Based Marketing Glossary Working Group
Dan Maxwell, PlaceIQ, Co-Chair
Adam Sweet, InMobi, Co-Chair

Mobile Advertising Committee
Matt Kaplan, Unification, Co-Chair

Augmented Reality (AR) for Marketing Working Group
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Asher Rapkin, Facebook, Co-Chair

Native Advertising/Playback Working Group
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Publisher Content Studio Working Group
User Generated Content (UGC) for Advertising Working Group
David Elkins, TripleLift, Co-Chair
Clay Webster, Vox.com, Inc., Co-Chair

OTHER COMMITTEES & COUNCILS

Brand Council
CFO Council
CRO Council

Public Policy Council
Research Council

Legal Affairs Council

Privacy Subcommittee

Ad Effectiveness Studies Working Group
Cross Platform Measurement Issues Working Group

Improving Ad Revenue Reporting Working Group

MOBILE MARKETING CENTER OF EXCELLENCE

Audio Committee
Gina Garzuza, National Public Media, Co-Chair
Les Hollander, Spotify, Co-Chair
Carrie Lieberman, HeartMedia, Co-Chair
Priscilla Valls, Pandora, Co-Chair

Podcast Business Working Group
B2B Committee
Tusar Barak, LinkedIn, Co-Chair
Jim Riesenberg, Ziff Davis, Co-Chair

Account-Based Marketing Working Group
Darragh Fitzpatrick, Rollworks, Co-Chair
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Improving Ad Revenue Reporting Working Group
Delivering value to our members is our top priority at IAB; and the financial state of IAB started and ended the year strong, allowing us to make big investments in solutions for growth for our industry and our members. According to unaudited 2019 financial statements, IAB is projected to finish the year with record-breaking topline consolidated revenue of $36.7 million, up from $33.3 million in 2018.

Membership dues revenue is projected to be $16.6 million for 2019, up 4% from $15.9 million in 2018. Events at IAB in 2019 are expected to bring in $7.7 million, up $7.3 million from 2018. Learning & Development revenue is projected to be up by 20% year-over-year at $1.6 million compared to $1.3 million in 2018.

Additional ongoing IAB revenue streams in 2019 included initiatives such as strategic partnerships with investment on research in the direct brand economy, international licensing fees, and other new initiatives.

In 2019, IAB invested the revenues received towards helping member businesses grow and excel. Funding was directed towards producing valuable third-party industry research and tools for building brands in digital media. We have also made significant investments in our Learning & Development curriculum, events, and increased investment in our public policy efforts on behalf of our members.

Overall, IAB managed expenses closely in 2019, which are projected to total $29.8 million, and closed the year with a net income surplus of $749,000.

We are poised and structured for a successful 2020 and look forward to connecting at a deeper level with all of our members.

**FINANCIAL KEY INDICATORS FOR 2019**

<table>
<thead>
<tr>
<th>REVENUE (’000) <strong>2019 PROJECTED</strong></th>
<th>2018 ACTUAL PROFORMA</th>
<th>$ VAR YOY</th>
<th>% VAR YOY</th>
</tr>
</thead>
<tbody>
<tr>
<td>MEMBERSHIP DUES</td>
<td>$16,678</td>
<td>$15,971</td>
<td>$707</td>
</tr>
<tr>
<td>EVENTS</td>
<td>$7,709</td>
<td>$7,352</td>
<td>$357</td>
</tr>
<tr>
<td>MOBILE CENTER</td>
<td>$868</td>
<td>$883</td>
<td>$(14)</td>
</tr>
<tr>
<td>VIDEO CENTER</td>
<td>$1,449</td>
<td>$1,275</td>
<td>$174</td>
</tr>
<tr>
<td>DATA CENTER</td>
<td>$1,090</td>
<td>$1,003</td>
<td>$88</td>
</tr>
<tr>
<td>LEARNING &amp; DEVELOPMENT</td>
<td>$1,638</td>
<td>$1,368</td>
<td>$270</td>
</tr>
<tr>
<td>*TECH LAB</td>
<td>$6,518</td>
<td>$4,963</td>
<td>$1,555</td>
</tr>
<tr>
<td>OTHER</td>
<td>$838</td>
<td>$571</td>
<td>$267</td>
</tr>
<tr>
<td>TOTAL REVENUE</td>
<td>$36,788</td>
<td>$33,385</td>
<td>$3,403</td>
</tr>
</tbody>
</table>

**COST OF GOODS SOLD**

| COST OF GOODS SOLD                | $6,186                | $4,683    | $1,503    | 32%       |

**GROSS PROFITS**

| GROSS PROFITS                     | $30,603               | $28,702   | $1,900    | 7%        |

**TOTAL EXPENSES**

| TOTAL EXPENSES                    | $29,824               | $28,351   | $1,503    | 5%        |

**NET INCOME**

| NET INCOME                        | $749                  | $252      | $497      | 113%      |

*Excluding Revenue Share ** Final unaudited financials for 2019

*Projections based on unaudited estimates through December 2019
The Interactive Advertising Bureau (IAB) empowers the media and marketing industries to thrive in the digital economy. Its membership is comprised of more than 650 leading media companies, brands, and the technology firms responsible for selling, delivering, and optimizing digital ad marketing campaigns. The trade group fields critical research on interactive advertising, while also educating brands, agencies, and the wider business community on the importance of digital marketing.

In affiliation with the IAB Tech Lab, IAB develops technical standards and solutions. IAB is committed to professional development and elevating the knowledge, skills, expertise, and diversity of the workforce across the industry. Through the work of its public policy office in Washington, D.C., the trade association advocates for its members and promotes the value of the interactive advertising industry to legislators and policymakers.

Founded in 1996, IAB is headquartered in New York City.