IAB State of Data 2021

Quantitative Analysis

Assessing Perceived vs. Actual Preparedness for the Post Third-Party Cookie and Identifier Tracking Ecosystem

3.9.2021

iab. | Ipsos

Table of Contents

SECTION

01 FOREWORD

02 EXECUTIVE SUMMARY

03 PART 1: ASSESSING THE PREPAREDNESS FOR THE LOSS OF THIRD-PARTY COOKIES AND IDENTIFIERS
- Brief intro
- Preparedness by company type
- Obstacles and challenges due to the loss of third-party cookies and identifiers
- Concerns regarding changes to third-party cookies and identifiers
- PART 1.A FINANCIAL IMPACT
  - Impact on revenue/equity due to the loss of third-party cookies and identifiers
  - Effects to usage of data due to changes to third-party cookies and identifiers
- PART 1.B THE POTENTIAL OF FIRST-PARTY DATA
  - The leveraging and types of first-party data collected
- PART 1.C INDUSTRY COLLABORATION
  - Collaboration to address the loss of third-party cookies and identifiers
- PART 1.D ASSESSING THIRD-PARTY DATA AND DATA ACTIVATION SOLUTIONS INVESTMENT
  - Third-party audience data: overall, by media channel, by type of data
  - Data activation solutions: overall and by type of solution

04 PART 2: RECOMMENDATIONS TO THRIVE IN THE POST THIRD-PARTY COOKIE/ID ECOSYSTEM
- Build a value-based relationship respectful of consumer preferences
- Get involved in defining standards–and adopt them
- Leverage third-party cookie/ID-less, privacy-first addressability solutions for audience insights
- Collaborate with the right experts within your company and across the industry

05 APPENDIX
- Methodology
- Respondent Profile
- Glossary

Foreword: Get Ready

This past year forced brands to shift customer engagement and communication strategies and tactics while consumers pivoted their routines to be home-centric. Just as the pandemic sounded a siren for brands and retailers to accelerate to e-commerce, the impending sunsetting of third-party cookies and rapid demise of mobile ad identifiers is a five-alarm alert for data leaders and decision-makers—both users and providers—across the digital advertising ecosystem to immediately and purposefully focus on preparing, solving and educating their respective teams on finding paths forward.

As part of our fourth annual State of Data initiative, IAB has commissioned Ipsos to co-create and execute this quantitative analysis of the industry's investment in, intentions for, and challenges with addressable data acquisition, collection and use.

IAB State of Data 2021: Assessing Perceived vs. Actual Preparedness for the Post Third-Party Cookie and Identifier Tracking Ecosystem--Quantitative Analysis assesses industry preparedness for the loss of third-party cookies and identifiers, trends data investments (time and dollars), and reveals the concerns and obstacles facing data leaders this year.

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Overall, this report surfaces a disconnect between the level of preparedness for the loss of third-party cookies and identifiers, and the understanding of the ramifications this poses to addressability.

In fact, upon surveying more than 200 data decision-makers across brands, agencies, publishers, ad tech and data companies this report illustrates the critical need for education, alignment, and innovation across disciplines, from top to bottom to find alternative ways to measure ROI and create a better, safer experience for consumers and brands alike.

The risk for those companies that may be leaning back or waiting for others to solve these issues could mean an ever growing, ever dwindling long tail of publishers that may have access to first-party data but are limited by unsophisticated data activation tools and the inability to effectively prove return on ad spend (ROAS).

The risk on the full ecosystem in having any companies waiting for a solve—including the risk to those who are currently working toward creating alternative paths forward—is an ever widening disconnect with the consumer, and potential upheaval of the digitally driven economy. IAB urges all players in this space to lean-in, collaborate and innovate. NOTE: On page 31 of this report, you will find a list of links to help you find ways to participate and get better educated.

Executive Summary

01 The Industry's Strong Sense Of Preparedness Is In Stark Contrast To Their Concerns And Challenges

Although most data leaders* (67%) believe they are prepared for the impending loss of third-party cookies and identifiers, their addressability concerns, challenges and rate of progress suggests this is overly optimistic as over 40% of the industry says they are concerned with limitations regarding targeting (45%) as well as with ad campaign measurement (41%).

02 There Continues To Be Too Much Reliance On Third-Party Data

Spending on third-party audience data, which increased 3.3% to $12.3B YoY in 2020, shows continued reliance on data sources becoming less reliable as third-party cookies and identifiers continue to be suppressed at greater rates.

03 The Industry Needs To More Aggressively Plan For The Potential Financial Impact Of The Post Third-Party Cookie/ID Ecosystem

Some of the companies that do NOT think their company's revenue (76%) & equity/resources (69%) will be impacted by the loss of third-party cookies and identifiers are likely being short-sighted. This is due to the investments they'll need to make to conduct business-as-usual in the future which include the types of data they purchase as well as the internal/external resources and partnerships needed for activation and new areas of expertise—in aggregate these will cut into profits, decrease margins and alter future financial strategies.

04 Industry Collaboration, Privacy-First Addressability Solutions And First-Party Data Are Essential For Success

The IAB's Programmatic+Data Center recommends a way forward designed to enable companies to thrive, not just survive, in the post third-party cookie and identifier ecosystem. Our recommendations are founded on leveraging the power of third-party cookie/ID-less tech that will stand the test of time and collaborating with the right experts within your company and throughout the industry in order to engage in and derive value from a privacy-first approach.

*A user/purchaser/collector/analyzer or seller/provider/facilitator of audience data supporting media efforts at one of the following types of companies: brand, agency, publisher, ad tech and data provider

PART 1

ASSESSING PREPAREDNESS

Is the ecosystem’s sense of preparedness for the loss of third-party cookies and identifiers consistent with their focus and concerns?

There are three critical findings this study reveals that must be immediately understood, absorbed and acted upon:

01. **Most data leaders* think their company's revenue & equity/resources will NOT be impacted by the loss of third-party cookies and identifiers.** In fact, they certainly will be impacted as investments will be needed to restructure their operations for the post third-party cookie/ID era.

02. **The full potential of first-party data is not being realized.** Data leaders need to aggressively collect and then leverage first-party data in a compliant exchange that benefits both the audience/ consumers and the brand/publisher.

03. **There is a strong level of concern for the execution of data-driven tasks fundamental to digital advertising and marketing, i.e., targeting and measurement.** Data leaders must collaborate with industry partners to implement privacy-first addressability solutions in order to resume those tasks with equal effectiveness.

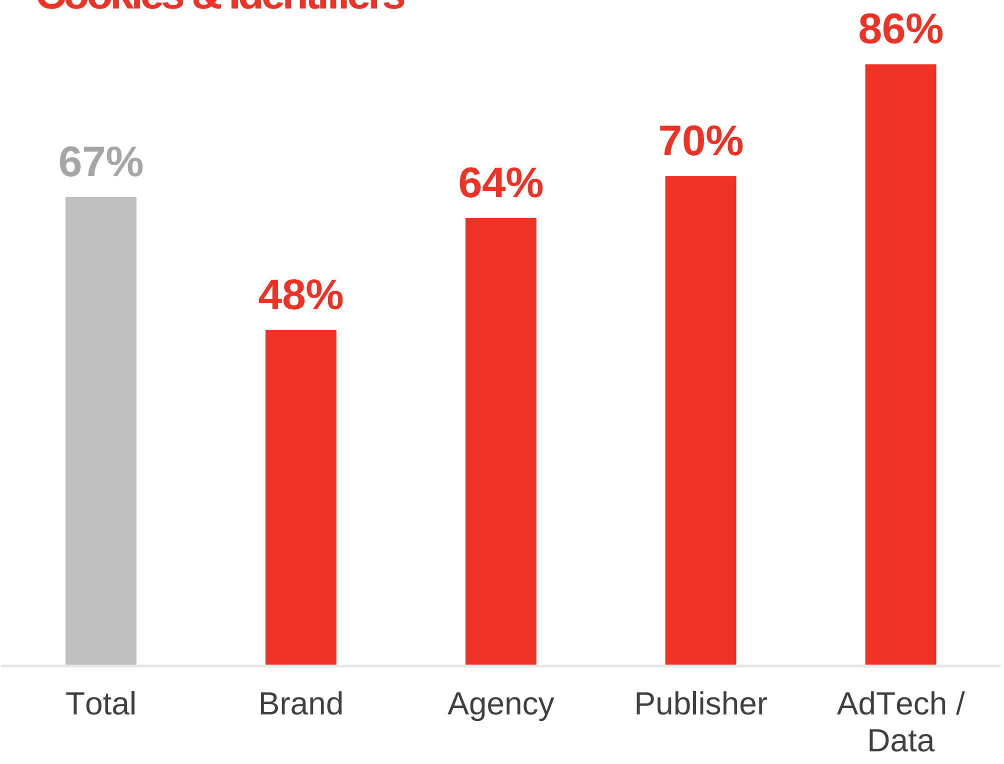
*A user/purchaser/collector/analyzer or seller/provider/facilitator of audience data supporting media efforts at one of the following types of companies: brand, agency, publisher, ad tech and data provider

Most data leaders think they are prepared for the loss of third-party cookies and identifiers

Brand advertisers report being the most unprepared for the loss of third-party cookies and identifiers but are also likely to delegate the heavy lifting to their agencies or ad tech providers.

Ad tech and data companies report being the most prepared for this shift in ad tracking, because data is the core of their business. For ad tech and data companies, it's solve or dissolve. These are the organizations currently leaning into IAB Tech Lab's Project Rearc and/or W3C. They are submitting proposals to find ways to align on the tech needed to enable targeting/ retargeting users, bid optimization, measurement of ad delivery and performance in a privacy-first scenario. These are the companies driving the ecosystem forward.

% Very/Somewhat Prepared for the Loss of Third-Party Cookies & Identifiers



Q. How prepared do you believe your company is when it comes to the current / impending changes to third-party cookies and identifiers as well as new consumer privacy laws and other kinds of privacy legislation? (Total, n=203)

Under 40% of data leaders expect to spend significant time on the obstacles and challenges they have identified related to third-party cookie and ID deprecation

Obstacles and Functional Challenges Expected to Occupy the Most Time in 2021

38%

Impending decline of **mobile advertising identifiers**

32%

Uncertainty surrounding **new data privacy regulation**

24%

Impending decline of **third-party cookies**

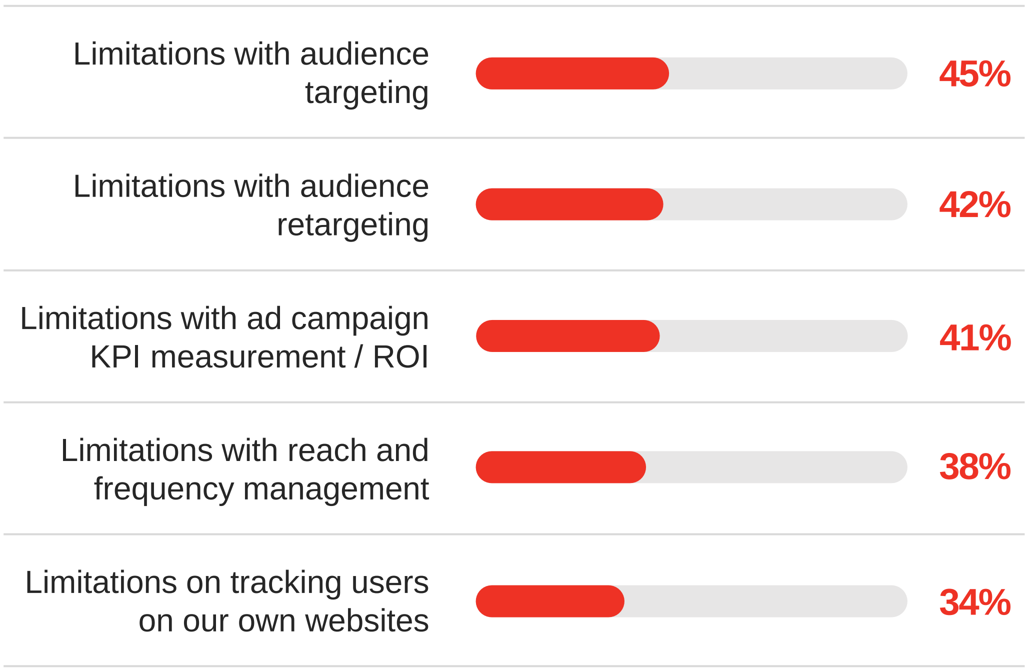
Which of the following obstacles and functional challenges do you expect will occupy the most of your/your colleagues' attention and resources in 2021? (Total, n=203)

Data leaders' concerns about executing essential identifier-based tasks suggests that their belief in preparedness isn't justified

One supposition is that the agencies and brands could be focusing their spend on channels that will allow them to correlate and optimize for attribution: i.e., walled gardens and large publishers with first-party data.

For publishers, there could be a reliance on ad tech to figure it all out; a belief that their ad tech stack competes with the walled gardens; and/or an over-estimation of the value of premium content.

Concerns Regarding Changes to Third-Party Cookies & Identifiers



Please rate your level of concern with each item below when it comes to the current / impending changes to third-party identifiers as well as new consumer privacy laws and other related legislation. - Top 2 Box Summary (Total, n=203)

PART 1A

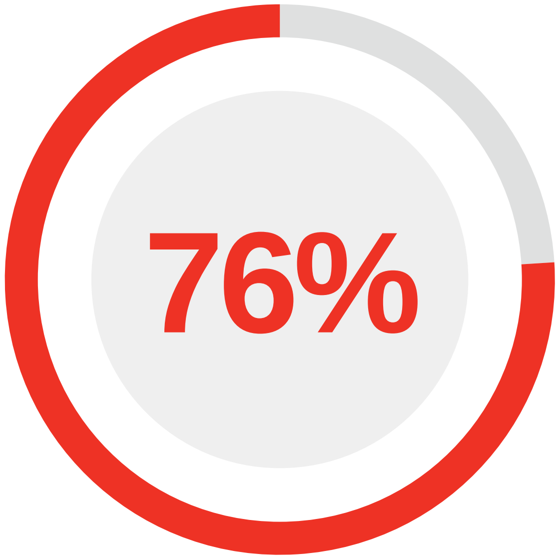
FINANCIAL IMPACT

Are data leaders accurately assessing the impact of the loss of third-party cookies and identifiers on their finances?

Most data leaders do NOT think their company's finances will be impacted by the loss of third-party cookies and identifiers

Data leaders do not yet realize that the loss of third-party cookies and identifiers could limit audience reach (scale) and precision (targeting). For brands, this loss in scale means revenue would go down or ROAS will not be realized as they are unable to target or reach customers. For publishers, ad sales could fall as advertisers shift their media strategy to other publishers and "walled gardens" that are able to show better marketing efficiency (i.e., quality traffic, conversions).

% Expect their Revenue will NOT be Impacted



% Expect their Financial Equity, Resources, Cash Flow will NOT be Impacted

How much do you think your company will be impacted by the impending loss of third-party identifiers in each of the following areas?
- Top 2 Box Summary (Total, n=203)

The effects on data use will lead to more resource investment while lowering company profit margins

More than one-third of data leaders anticipate additional investments: increasing spend on the use of first-party data, bringing data management in-house and centralizing all CRM data into one repository.

Additional Insight: in a separate question, 34% of data leaders expressed concerns about potential walled garden CPM increases—another increase in investment as a result of changes to third-party cookies and identifiers.

% Expected Effects to Usage of Data Due to Changes to Third-Party Cookies & Identifiers

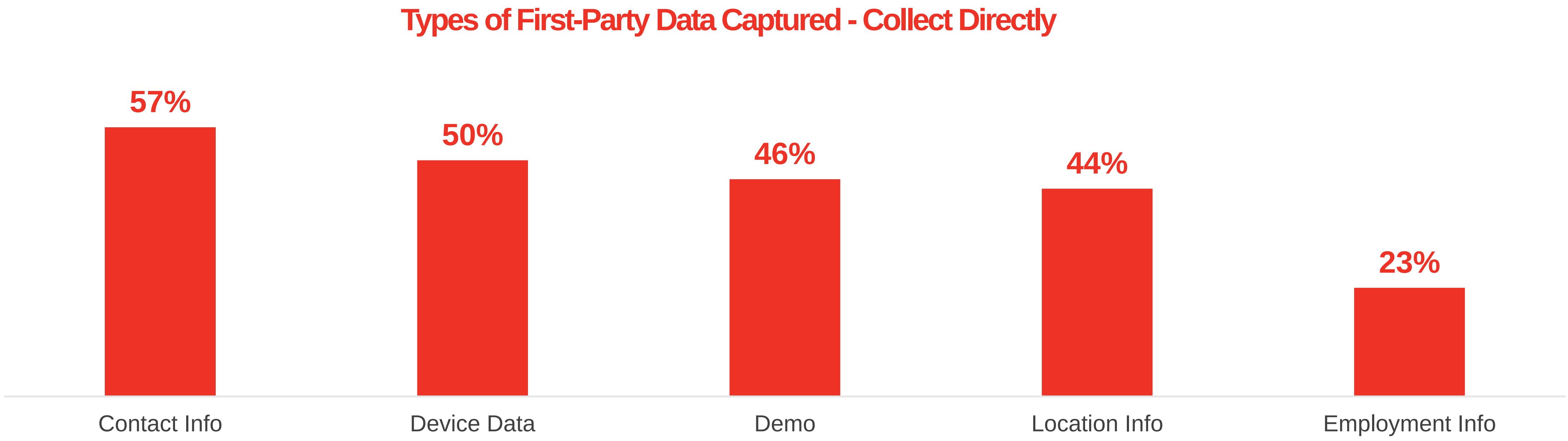
How do you expect the coming changes to third-party cookies and identifiers will affect your company's use of data? (Data Users, n=121)

PART 1B

THE POTENTIAL OF FIRST-PARTY DATA

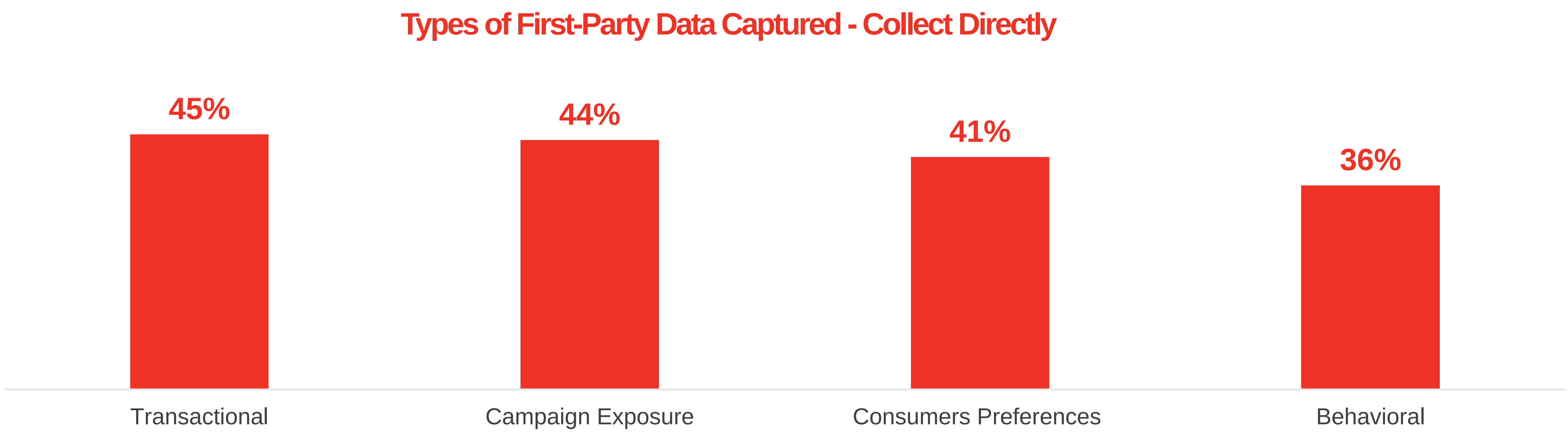
Are data leaders collecting and unlocking the potential of their first-party data in preparation for the loss of third-party cookies and identifiers?

Slightly more than half of data users are currently collecting basic first-party data



What types of first-party data points does your company collect / plan to collect or obtain / use through 3rd party partnerships to support media efforts, including advertising and marketing? (Data Users, n=121)

Less than half of data users are collecting sophisticated media, shopping and behavioral first-party data

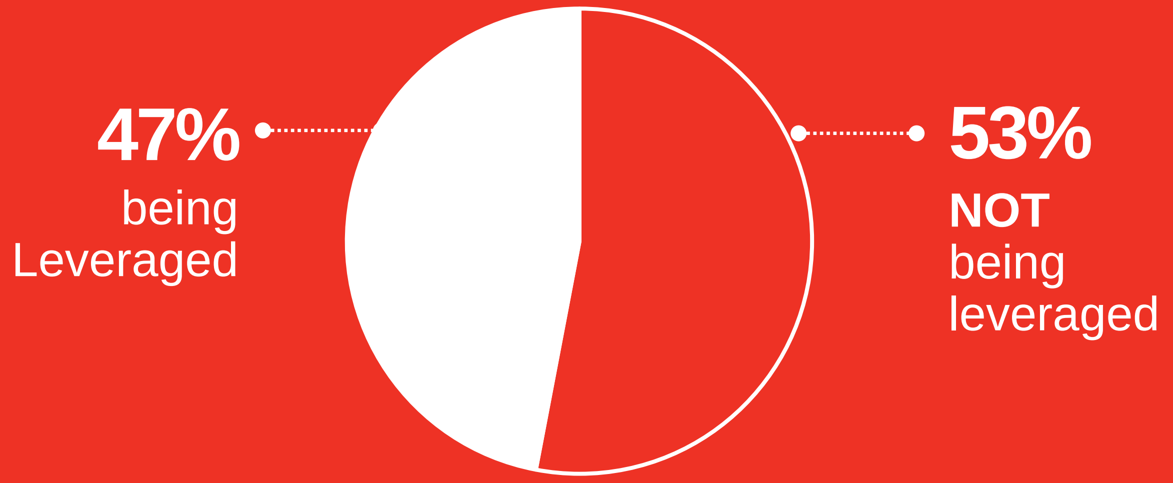


What types of first-party data points does your company collect / plan to collect or obtain / use through 3rd party partnerships to support media efforts, including advertising and marketing? (Data Users, n=121)

Data leaders are sitting on valuable, untapped opportunities to use their collected data to better connect with their consumers and audiences

The majority of collected first-party data is NOT leveraged for advertising and marketing purposes

% of First-Party Data being Leveraged for Media (incl. Advertising & Marketing)



Think about all of the first-party data your company collects to support media efforts, including advertising and marketing. How much of the collected data were you/your colleagues able to activate on/leverage in 2020? (Data Users, n=121)

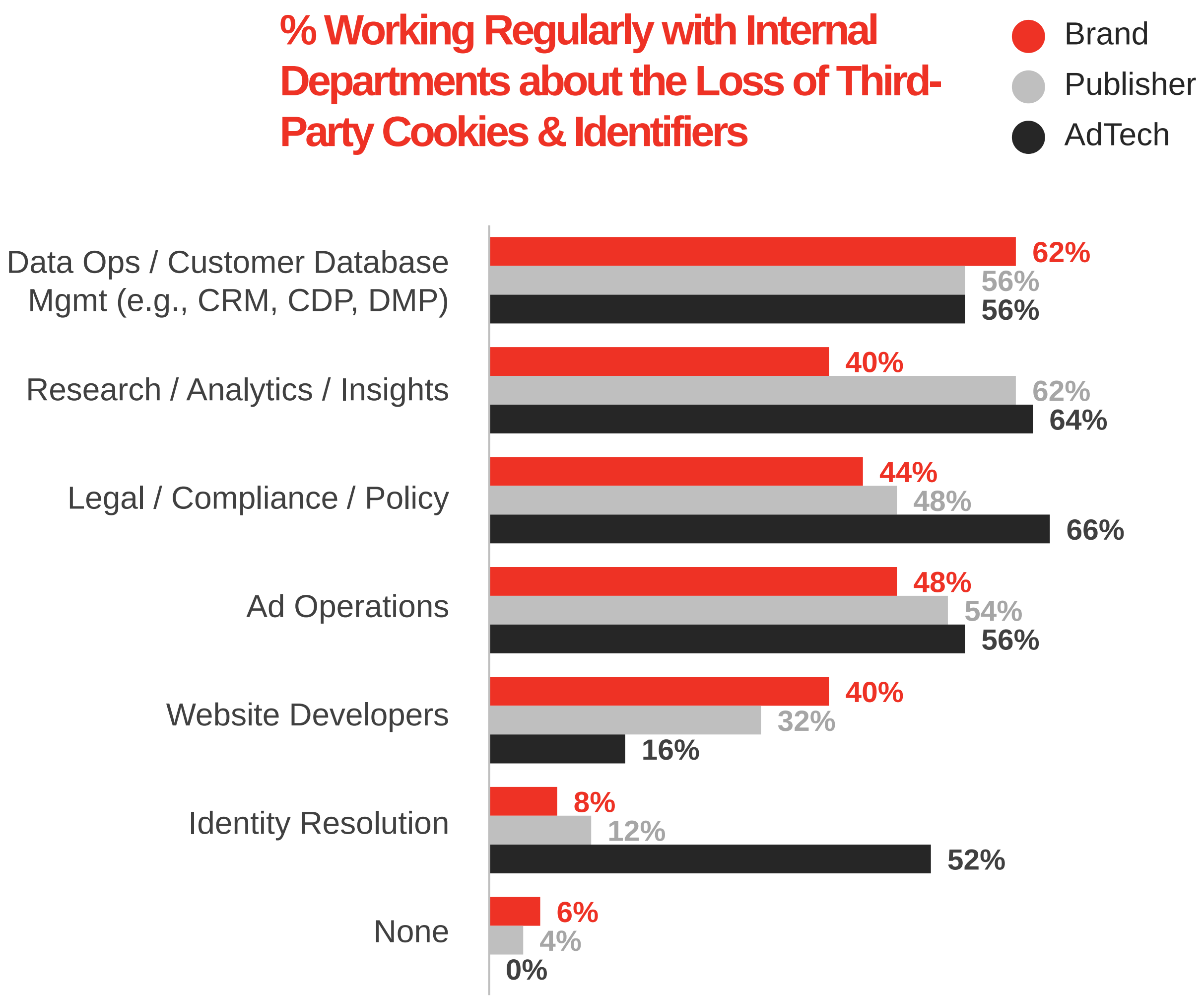
PART 1C

INDUSTRY COLLABORATION

Are data leaders collaborating enough with the right experts to be prepared for the loss of third-party cookies and identifiers?

Ad Tech’s collaboration with Legal and ID Resolution teams about the loss of third-party cookies/IDs correlates with their strong sense of preparedness

Conversely, data leaders at brands and publishers are not working enough with internal legal/compliance departments and ID resolution experts which likely correlates to their lower senses of preparedness.

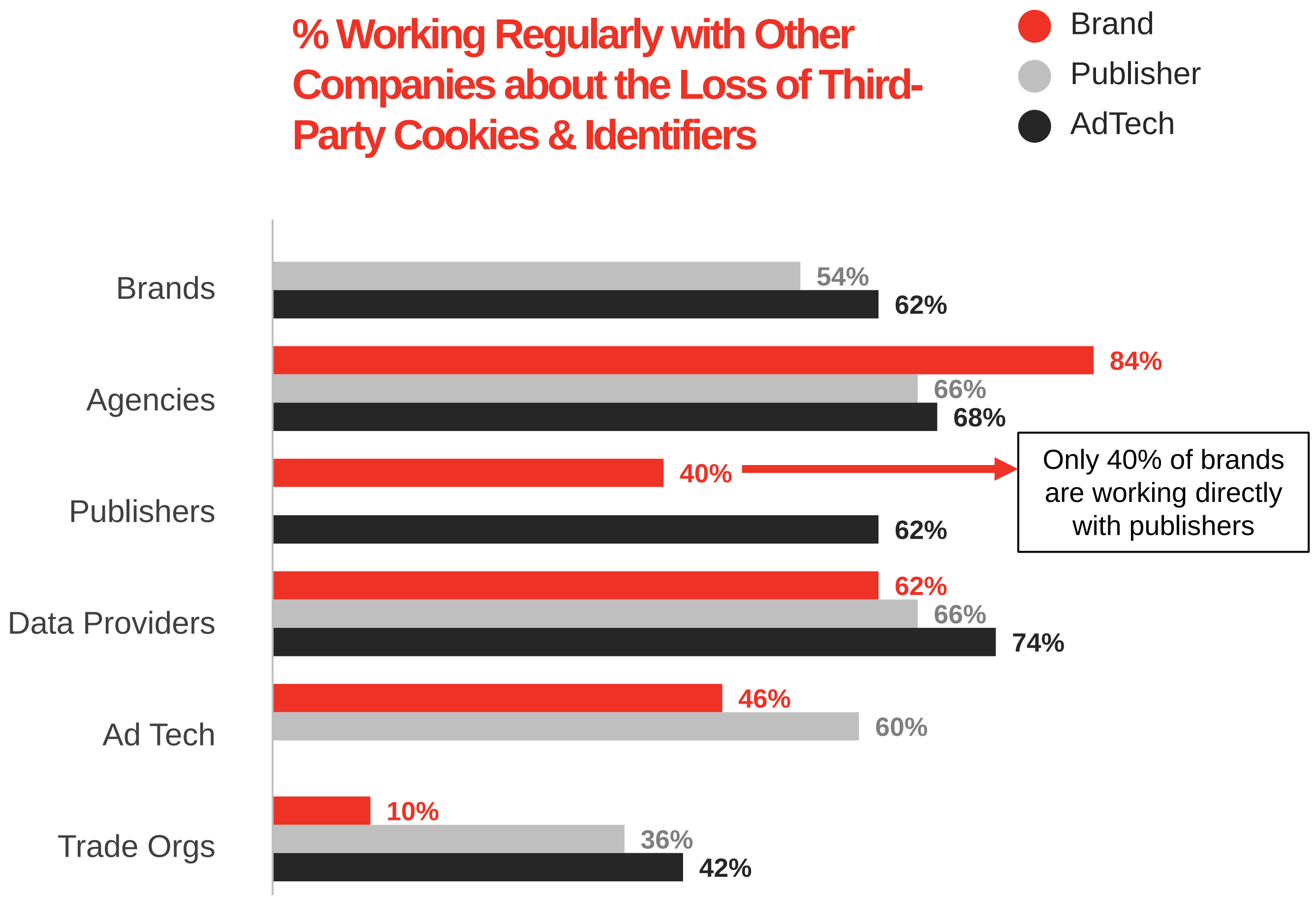


Which of the following internal departments / experts are you working with regularly in your company to prepare for the coming decline of third-party cookies and identifiers? (Brand, n=50) (Publisher, n=50) (AdTech, n=50)

Brands, publishers, and ad tech companies are working most consistently with agencies and data providers on third-party cookie/ID solutions

Without greater collaboration, the industry will not be able to build the interoperable standards needed in the post third-party cookie/ID world. The alternative is a fragmented walled garden.

% Working Regularly with Other Companies about the Loss of Third-Party Cookies & Identifiers



Which of the following departments / experts are you working with regularly at external companies to prepare for the coming decline of cookies and other third-party identifiers? (Brand, n=50) (Publisher, n=50) (AdTech, n=50)

PART 1D

ASSESSING THIRD-PARTY DATA AND DATA ACTIVATION SOLUTIONS INVESTMENT

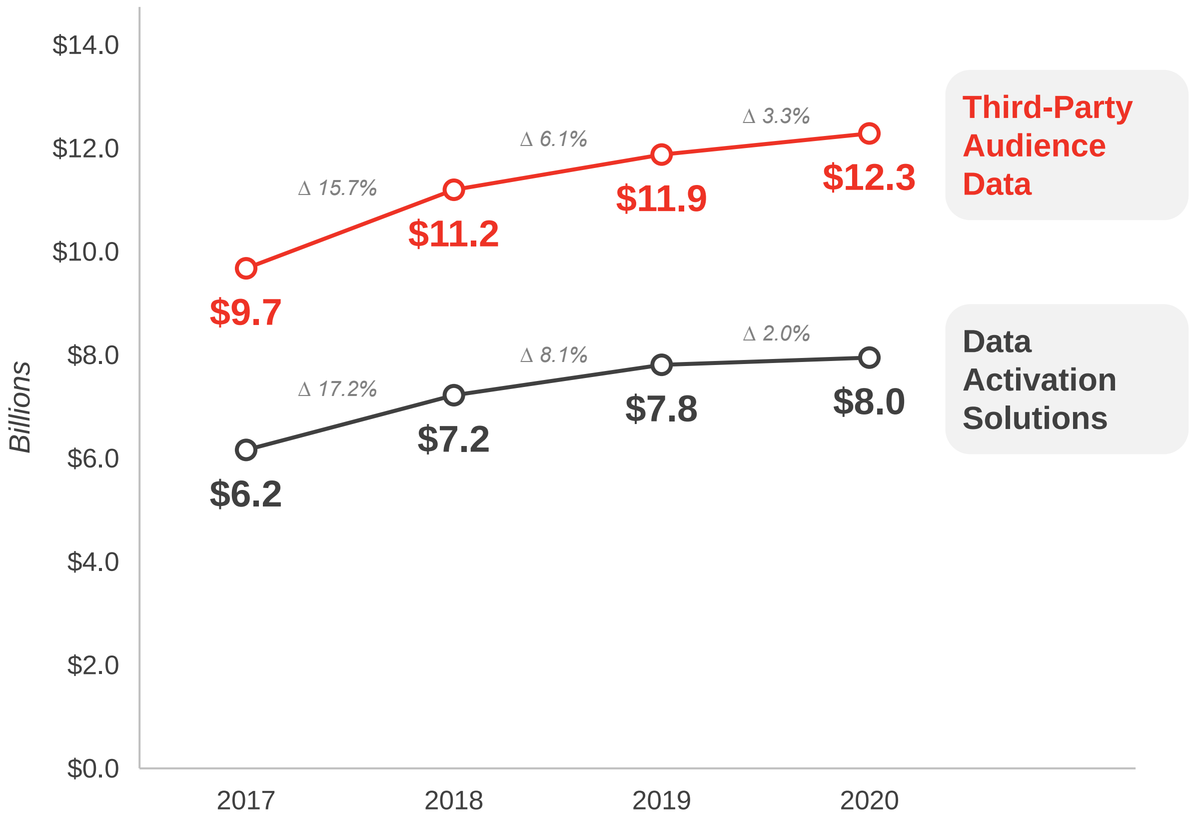
What do these investment trends indicate regarding the loss of third-party cookies and identifiers?

Growth in third-party data investments points to a lack of understanding that it's this data that will be lost

The transition away from third-party cookie/ID-enabled data will be slow and likely nuanced by other third-party data not dependent on third-party cookies and identifiers.

For example, many syndicated panel-based or registry-based insights will be in greater demand as insights providers (Kantar, Polk, etc.) take their opt-in data to match with other data.

Year-over-Year Change in Third-Party Data-Related Expenditures



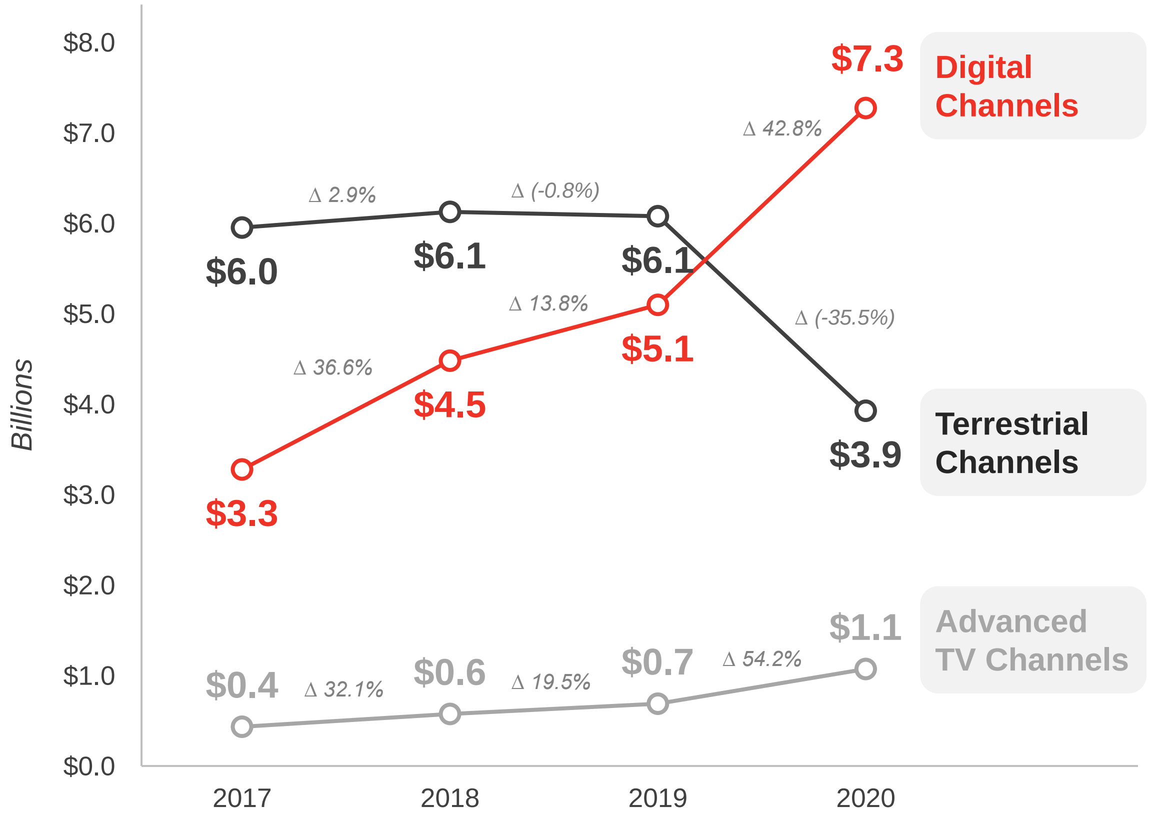
*2017-2019 data is from the State of Data research conducted and published by Winterberry Group in partnership with the IAB Programmatic+Data Center of Excellence

Increases in e-commerce and digital media usage are driving current third-party data investment

Threat Assessment:

Lack of preparedness/solutions for a post third-party cookie/ID ecosystem poses a risk to the ability to paint a full picture with digital data. Currently, third-party data offers rich user profiles—from contact information to behavioral preferences—for audience reach, measurement precision and data needed for attribution models.

Year-over-Year Change in Third-Party Audience Data Expenditures by Channel



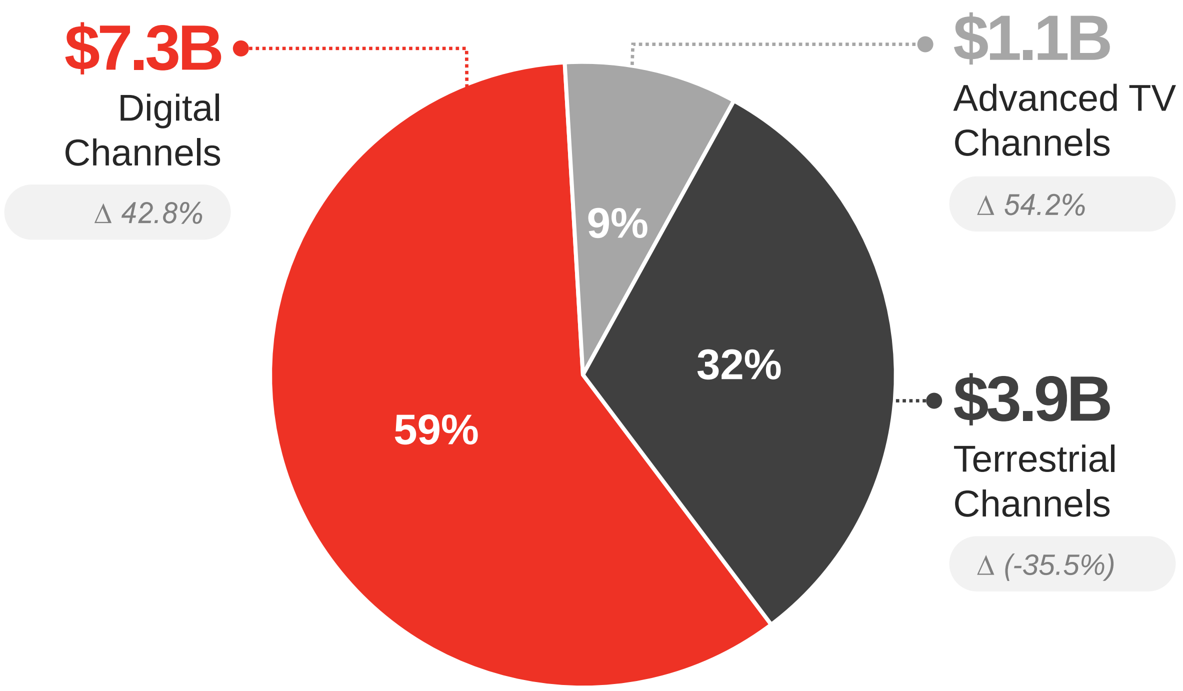
*2017-2019 data is from the State of Data research conducted and published by Winterberry Group in partnership with the IAB Programmatic+Data Center of Excellence

The surge in Advanced TV data reflects the value in understanding more viewers moving to streaming video, OTT and CTV

Advanced TV data posted the strongest growth in 2020, +54.2% YoY.

This unprecedented growth was made possible as Advanced TV bit into the terrestrial channel's share of the data spend pie. Not only was Advanced TV data providing measurement, but it was also providing rich profiling context through viewership preferences. This data has become valuable with the rise of streaming through SVOD and FAST (free ad-supported streaming TV) and the consequent rise of OTT platform usage.

Share of Third-Party Data Expenditures by Channel (2020)

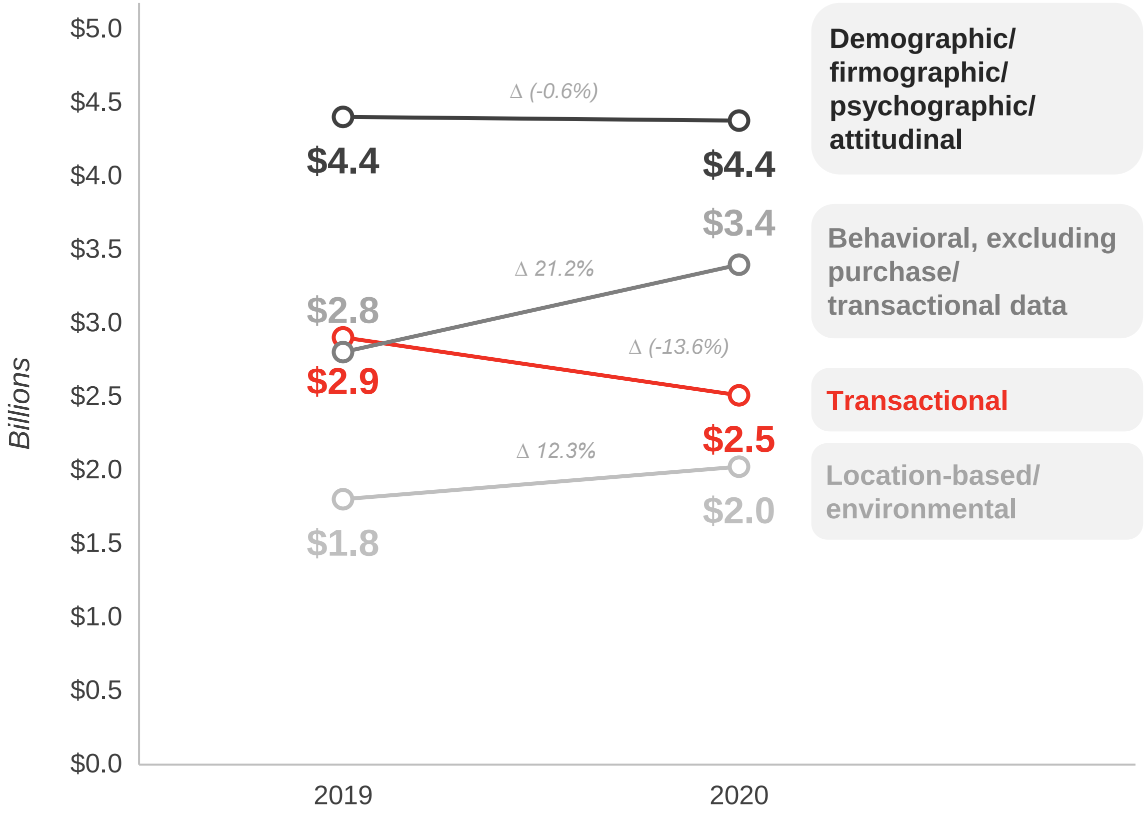


Third-party behavioral data enables a view into evolving consumer COVID-driven shopping and media habits

Learning what consumers do online vs. what they buy online becomes increasingly more important.

The growing reliance on behavioral data reflects the industry's need to identify how, where and why consumers spend their time. The increase of e-commerce drives an increase of behavioral data surrounding a purchase—even if the purchase didn't happen. State-level COVID restriction discrepancies contributed to increases in third-party location data investment.

Year-over-Year Change in Third-Party Audience Data Expenditures by Type



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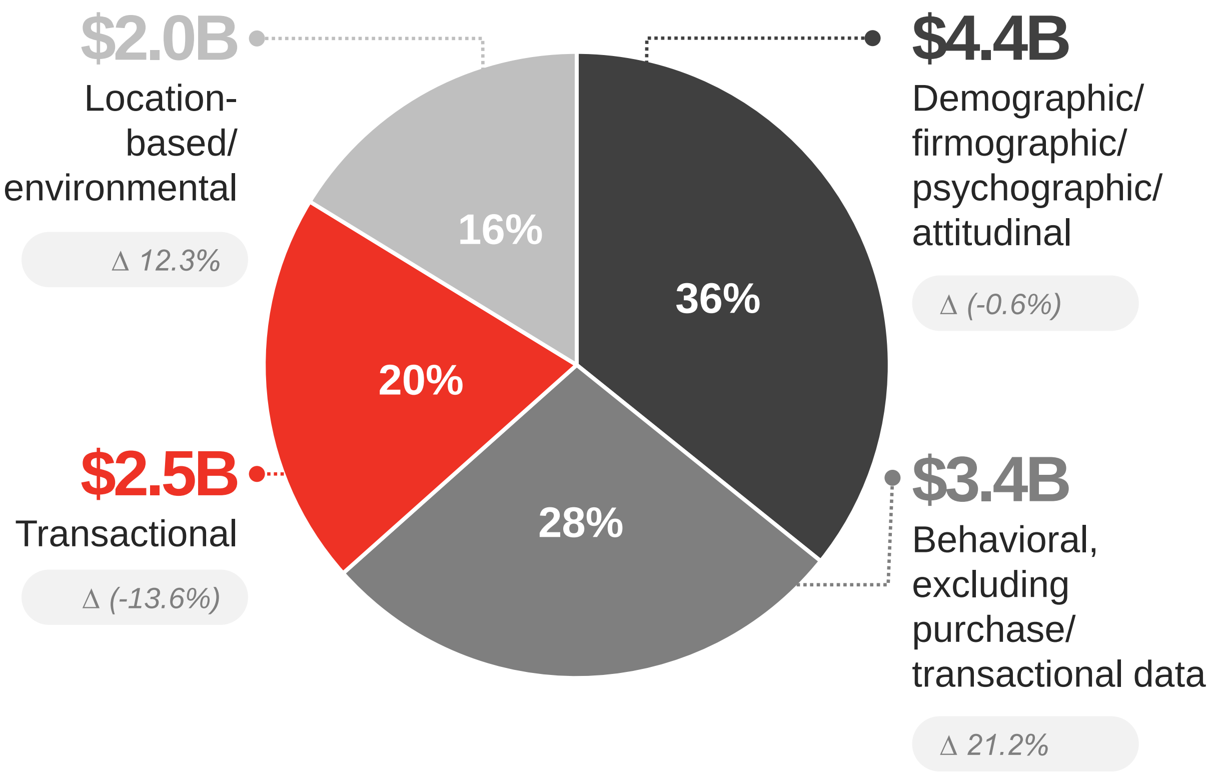
Most third-party data investment continues to focus on consumer profiles – demos, attitudinal, etc.

Transactional data lost $400M in data revenue to the "great lockdown."

Prior to the pandemic, transactional data served to understand the types of brands and products being purchased. It was also used to understand purchase channels – i.e., which stores, restaurants or retailers were visited. However, the "great lockdown" has made it so that an increased number of transactions and product purchases were going through aggregators (i.e., Doordash, Grubhub) or non-traditional channels (i.e., Shopify, Etsy). Because of this, much of the transactional data was getting lost in the ether, unclassified, as purchases of unbranded products from smaller businesses both local and online.

Share of Third-Party Data Expenditures by Type (2020)

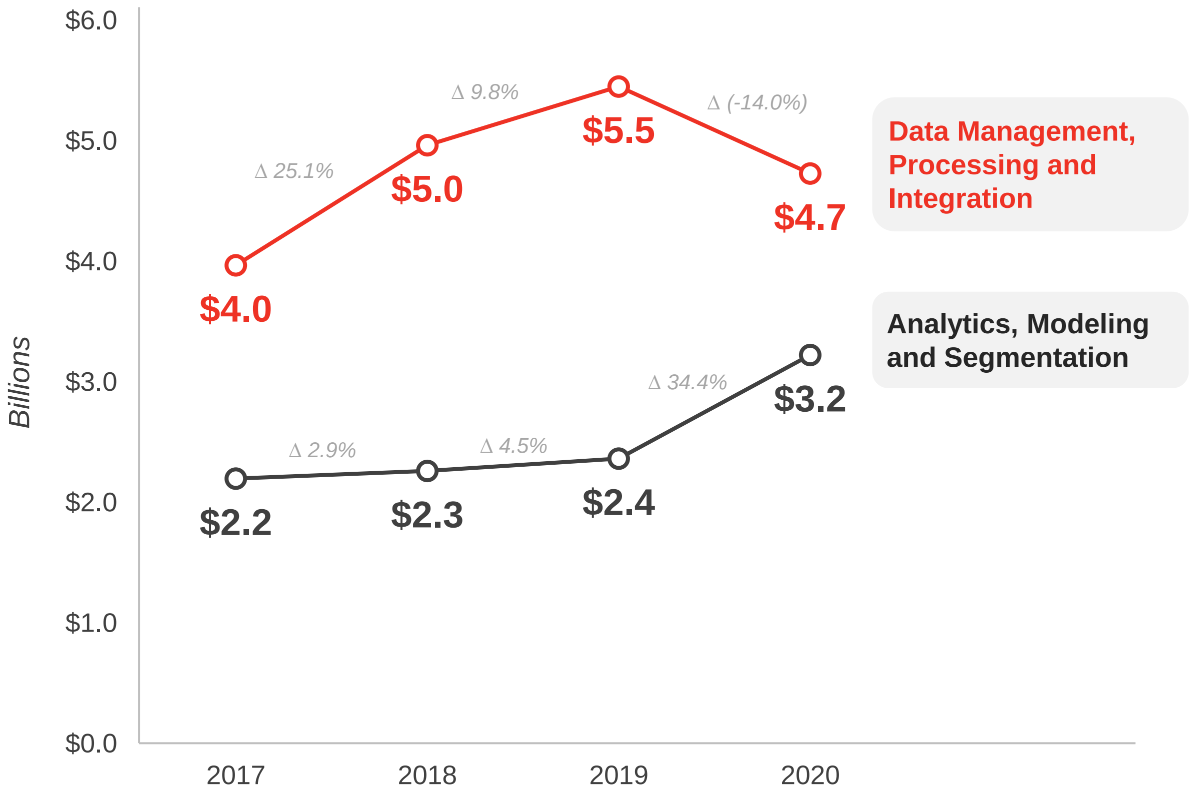


Data activation investment is shifting toward segment-driven, holistic views of the consumer (despite flat overall YoY at $7.9B)

Analytics, modeling and segmentation saw an increase in investment in a year of radical consumer behavioral shifts.

This is a clear sign of things to come as data leaders sort through what audience data sets and behavioral information they will need in order to obtain the same insights and make the same decisions as they previously did with the help of third-party cookies and identifiers.

Year-over-Year Change in Data Activation Solution Expenditures by Type



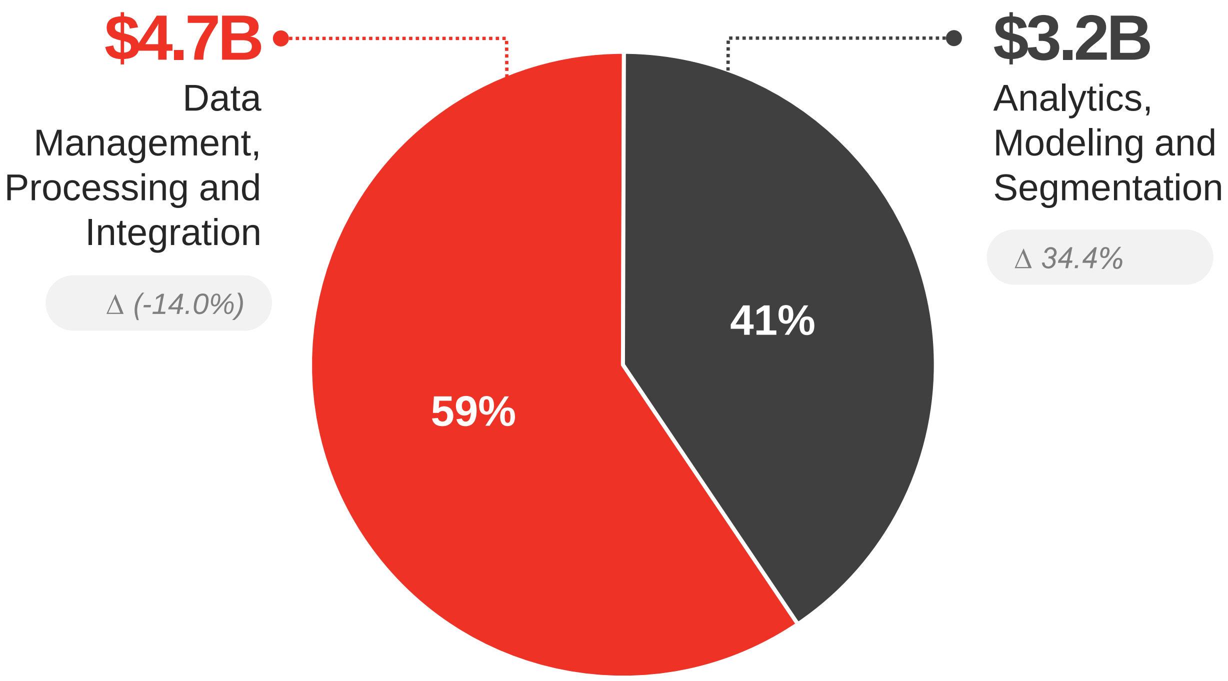
*2017-2019 data is from the State of Data research conducted and published by Winterberry Group in partnership with the IAB Programmatic+Data Center of Excellence

Despite a shift toward activation, spend remains heaviest in management and processing of third-party data

Investment in data management, processing and integration fell 14% YoY, yet still saw greater spend vs. data/marketing-science offerings.

The continued investment in data management, processing and integration reflects the continued reliance on expensive, legacy systems powered by third-party data, which continues to see increased investment YoY.

Share of Data Activation Expenditures by Type (2020)



PART 2

RECOMMENDATIONS

IAB's recommendations for ways to thrive in the post third-party cookie and identifier ecosystem

01 Build a value-based relationship respectful of consumer preferences on the collection and use of rich, secure data

When creating experiences that consumers value, they are more inclined to share their data, which in turn enables brands and platforms to develop engaging and personalized experiences. This also sets the stage for more effective tracking, measurement and brand safety/fraud detection.

SOME ACTIONS YOU CAN TAKE

- Educate your consumers/audience before obtaining their permission in order to track them in responsible ways
- Make it clear to your consumers/audience what the value proposition is in exchange for their data
- Begin or continue to amass a first party data set that can be mapped to other data sets for additional insights

PROVIDE TRANSPARENCY ON HOW THE DATA IS BEING USED

- List the types of data being used for targeting: address, full name, job title, occupation, shopping preferences, lifestyle, interests, etc.
- Indicate you are targeting consumers because they “look-alike” their current customers (prospecting)
- Indicate you are retargeting consumers based on behavior
- When targeting consumers/audiences outside of your O&O property, state that you are using first-party offline data (hashed email) and that you may append third-party data to their profiles

02 Get involved in defining standards and adopting them

The impending post third-party cookie identifier era has prompted the ad industry to turn to industry bodies, such as IAB, IAB Tech Lab, and PRAM, for solutions.

New playbooks, technical standards, policy guidance and accountability programs need to be written, and as such, consortiums and working councils need to take on new initiatives for this purpose. BUT, this all means nothing without actual adoption by the industry.

> ***Gathering and managing audience data is becoming increasingly difficult. There is so much uncertainty in the industry on what the best solution is going forward.***
>
> -Analyst, publisher

**Note: the latter will be updated and published in September 2021. Together, these documents can help level set the industry on its value to the whole US economy as well as provide insight into why this ecosystem needs a reset.

SOME ACTIONS YOU CAN TAKE

- **All stakeholders**
  - Review findings on: The Socioeconomic Impact of Internet Tracking and The Economic Value of the Ad-Supported Ecosystem**
  - Plan to support the adoption of standards, solutions, and policies developed by PRAM/Rearc (see links below)
- **Business stakeholders**
  - Participate in IAB Programmatic+Data Center's Measurement & Attribution and Identity & Audience Data committees
  - Participate in PRAM Business Practices working group
- **Policy/Privacy stakeholders**
  - Participate in PRAM Privacy, Policy, and Legal working group
- **Technical/Product stakeholders**
  - Participate in IAB Tech Lab's Rearc Accountability & Rearc Addressability working groups
  - Participate in W3C Web Advertising Business Group and other groups defining new browser standards

03 Leverage third-party cookie/ID-less, privacy-first addressability solutions to understand, measure and monetize audiences

What should be the new measurement unit? What data could we use? How can we stitch things together now?
AI and ML can thrive without third-party cookies and identifiers. The key is on the right data sets and integration.

SOME ACTIONS YOU CAN TAKE

- Begin focusing on aggregate data, and analyze it as if you were not able to track all conversions within an ad tech platform; what insights can be gained from that data?
- Separate your campaigns by operating system and browsers; compare how each are currently performing; set new KPIs by browser/app/operating system
- Analyze different attribution models and latency/attribution windows since it's unclear what Chrome's limitations in attribution windows will be
- Explore optimizing and increasing contextual targeting
- Begin analyzing and determining which campaigns and corresponding KPIs are most important to track since there will likely be limitations on the number of campaigns/events that can be identified in future requirements (note: Facebook limits to 9 campaigns and 8 events for iOS 14)
- AI/ML will need to be trained to be modeled from aggregate data vs. raw event data to project audiences, bid requests and optimization. Marketers and publishers should try to overlay the aggregate data to their first-party site, behavioral and audience data

04 Collaborate with experts within your company and across the industry to implement privacy-first addressability solutions

We'll have to educate the clients in the upcoming changes and why results cost more, at the same time research & propose cost effective solutions. Most execs don't understand how the upcoming changes will dramatically effect results.

- C-Level, Agency

SOME ACTIONS YOU CAN TAKE

- Have collective discussions with all the stakeholders, specifically regarding different media strategy considerations, attribution modeling and user privacy; assess their impacts to your business

Internal Experts

- Marketing, tech, data/analytics, compliance/legal/governance; encourage all to participate in trade organization efforts, as well as be involved in discussions with external partners

External Experts

- Trade organizations; discuss and share your concerns and approaches; help to create solutions and standards
- Discuss and emphasize what's important to you with your key external partners: brands, agencies, publishers, ad tech, data companies

APPENDIX

Methodology

Partnered With Ipsos

IAB Research & Analytics partnered with Ipsos to develop an industry-focused quantitative exploration to assess the digital advertising ecosystem's preparedness for the loss of third-party cookies and identifiers. Specifically, the study looked to identify trends in data spending, areas of focus related to data and what the concerns and obstacles that data leaders are facing this year.

A key goal of this effort was to drive recommendations for the way forward across 4 key areas:

1. Measurement & Attribution
2. Identity & Addressability
3. Regulation (policy and compliance)
4. Organizationally (i.e., communication/partnerships both internally and externally)

Sample Generated

Ipsos leveraged NewtonX B2B sample methodology to recruit verified data leaders, identified as either providers or users of data and further classified based on their purview into data spend or revenue for their employer, across the following 5 company types:

n = 203

- Brands
- Publishers
- Ad Tech
- Agencies
- Data Companies

Survey Execution

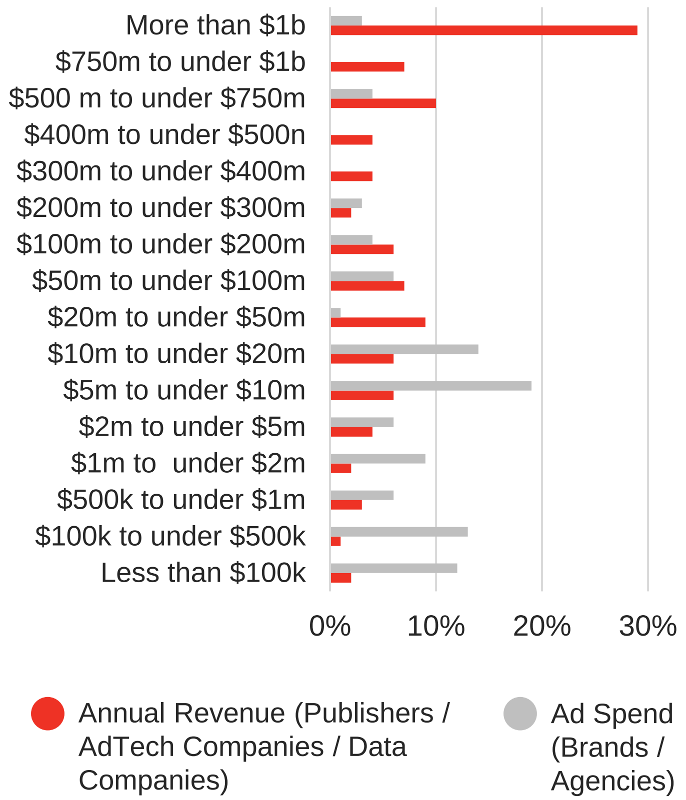
A 15-minute anonymous online survey

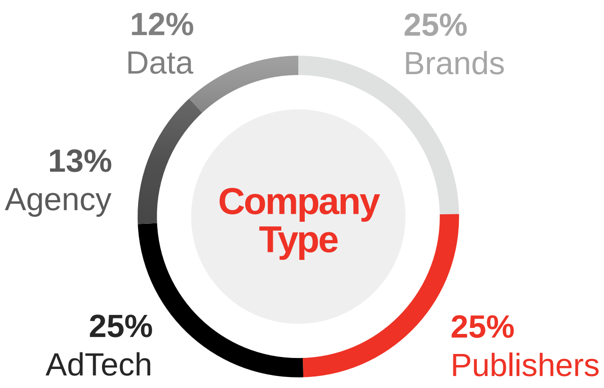
Fielded January 1st – January 19th, 2021

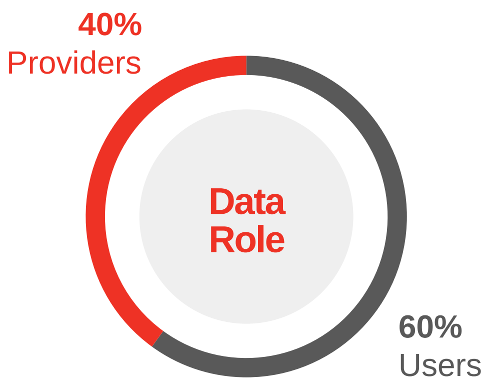
Third-Party Data And Data Activation Solutions: Projection Methodology

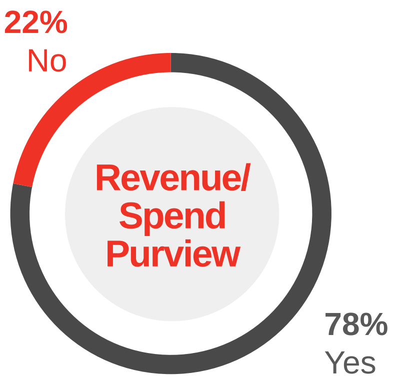
IAB Research & Analytics partnered with mdrk Consulting to develop a multi-method statistical model to estimate the size of the third-party audience data and data activation solutions in U.S. markets. Statistical methodologies included heuristic analyses of industry trends via public filings across the ad ecosystem, segmented/weighted distributions of quantitative State of Data survey results, and growth-based projections of historic report findings.

Respondent Profile









Glossary

AUDIENCE DATA

Information leading to insights into the identity, geo, interests, purchase intent / behavior and/or other attributes of individual, recognizable consumer and B2B audience members—including data that is either "personally identifiable" (PII) or non-PII in nature

- Note: It expressly does not include general market research, aggregated media metrics and other informational resources that may provide insight into broad populations

TERRESTRIAL MEDIA CHANNELS

Includes—but is not limited to—direct mail, telemarketing, event marketing, etc.

DIGITAL MEDIA CHANNELS

Includes—but is not limited to—display advertising, social, email, etc.

ADVANCED TV MEDIA CHANNELS

Includes—but is not limited to—CTV, OTT, set-top boxes, streaming services, etc.

BEHAVIORAL, EXCLUDING PURCHASE/TRANSACTIONAL DATA

"What have they done/been looking for?"

DEMOGRAPHIC/FIRMOGRAPHIC/PSYCHOGRAPHIC DATA

"Who is the audience member? What do they think/want?"

TRANSACTIONAL DATA

"What have they purchased?"

LOCATION-BASED/ENVIRONMENTAL DATA

"Where are they? What are the conditions local to them?"

DATA MANAGEMENT, PROCESSING AND INTEGRATION SOLUTIONS

Managed services and technologies related to building and maintaining customer and prospect databases, data pools and other repositories and resources—enabling profile creation, customer relationship management (CRM) and structuring of data to support optimal campaign management for marketing and audience engagement. Includes data management platform (DMP), customer data platform (CDP) and identity resolution solutions—as well as integration, processing, hygiene and brand safety solutions supporting media placement and cross-channel marketing activation

ANALYTICS, MODELING AND SEGMENTATION SOLUTIONS

Managed services (and fees associated with underlying toolsets that may be dedicated to marketing purposes) that support development of audience insights through segmentation (for targeted marketing efforts and media planning), predictive modeling, as well as measurement and spending/campaign attribution

About IAB

The Interactive Advertising Bureau empowers the media and marketing industries to thrive in the digital economy. Its membership comprises 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.

About the IAB Programmatic+Data Center

The IAB Programmatic+Data Center is a unit within IAB, founded to enhance existing IAB resources, and to drive the data agenda for the digital media, marketing, and advertising industry.

The Programmatic+Data Center's mission is to expand the programmatic universe, increase the understanding of how data drives business, and make them easily accessible to all.

IAB Programmatic+Data Center is focused on:

- Gathering industry thought leaders to drive and set the data agenda
- Funding industry research to provide benchmarks and actionable insights on data management across platforms including programmatic, mobile, and the "internet of things"
- Developing industry best practices, guidelines, and standards for privacy, data security, measurement, and consumer data protection
- Creating educational materials including certification, infographics, videos, webinars, and seminars to demystify data for marketers and advertisers
- Hosting data-focused events that feature industry luminaries discussing data related topics

IAB Programmatic+Data Center Board Member Companies Include:

AccuWeather, acxiom, adstra, Broadsign, EPSILON, experian, Google, IBM Watson Advertising, neustar, nielsen, Pinterest, theTradeDesk

About Verizon Media

Verizon Media, a division of Verizon Communications, Inc., houses a trusted media ecosystem of premium brands like Yahoo, TechCrunch and Engadget to help people stay informed and entertained, communicate and transact, while creating new ways for advertisers and media partners to connect. From XR experiences to advertising and content technology, Verizon Media is an incubator of innovation and is revolutionizing the next generation of content creation in a 5G world.

About Ipsos

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

"Game Changers" – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP
www.ipsos.com

Game Changers

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:
You act better when you are sure.