IAB Canada Barometer Report
Data Disruption in 2020

March 27, 2020

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Data / Emerging Platforms / Cookieless World

A Barometer on Industry Realities

Looking at the data supply chain, what do data transparency requirements & the imminent death of the cookie mean for the industry in 2020 and how will regulations affect our ability to use data at scale?
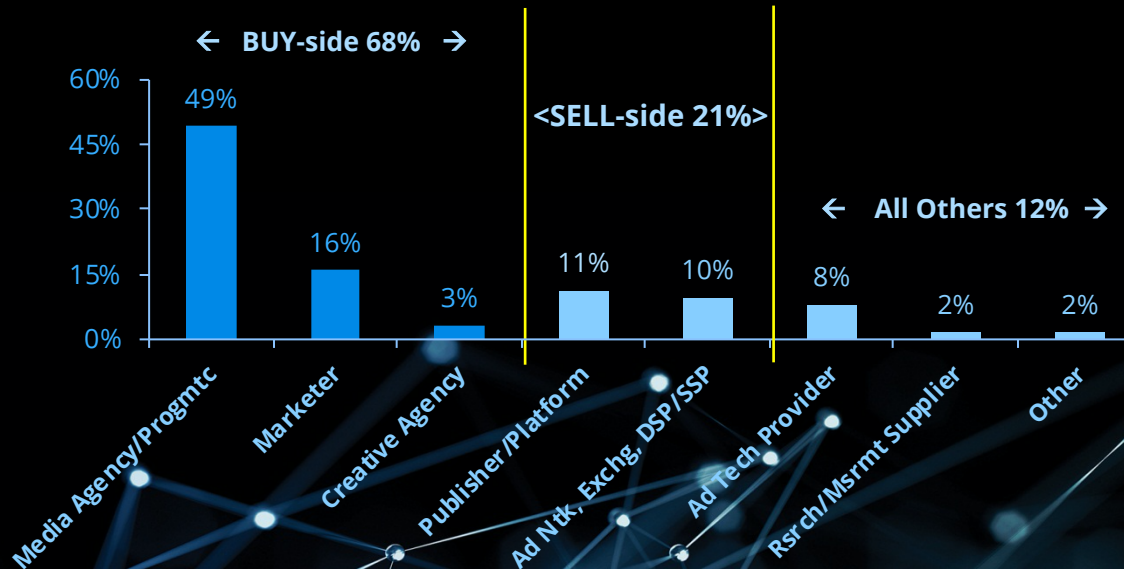
Taking inventory' of where we stand in early 2020, as digital advertising begins to reflect a more diversified portfolio, such as Location-based advertising/DOOH and Digital Audio.

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Sample heavily buy-side in this survey

Seven-in ten respondents are Buy-side.
(In-field Feb 28 - Mar 18, 2020; Base-Completed surveys)

Type of company you work for (% rounded)

← BUY-side 68% →

<SELL-side 21%>

← All Others 12% →

Category	%
Media Agency/Progmtc	49%
Marketer	16%
Creative Agency	3%
Publisher/Platform	11%
Ad Ntk, Exchg, DSP/SSP	10%
Ad Tech Provider	8%
Rsrch/Msrmt Supplier	2%
Other	2%

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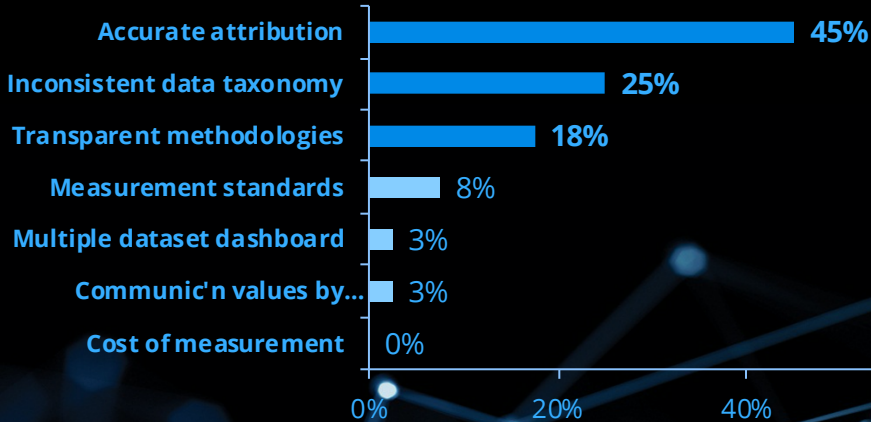iab.canada

Pressing Digital Data Challenges

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Attribution Accuracy – Top Concern for Buyers

Attribution is by far the most pressing concern on the agency/client side; inconsistent taxonomy and opaque methodologies making-up the Top-3.

Buy-side Member Sample
Percent sample: Most Pressing Data Challenge

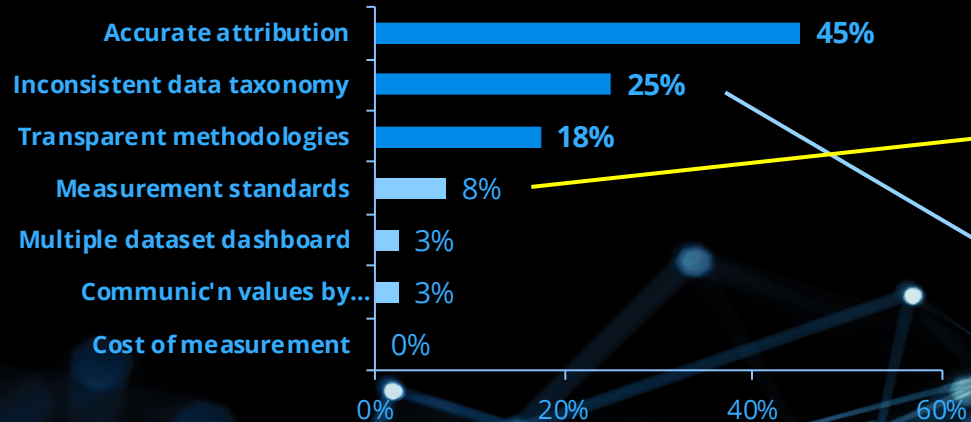| Category	Percent
Accurate attribution	45%
Inconsistent data taxonomy	25%
Transparent methodologies	18%
Measurement standards	8%
Multiple dataset dashboard	3%
Communic'n values by...	3%
Cost of measurement	0%

0%   20%   40%   60%

Statements in full
- Accurate attribution measures - i.e. across ad formats, devices and legacy platforms
- Inconsistent data taxonomy- i.e. for data syncing (cookie match rates) against e.g. auto intenders
- Transparency in methodologies
- Consistent measurement standards for ad formats & platforms
- Single dashboard that consolidates multiple data sets
- Establish relative communication values of different formats/platforms- i.e. to permit apples-to-apples calculations
- Cost of measurement

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Measurement Standards Tops Taxonomy for Sellers/Researchers

'Buy-side' Member Sample
Percent sample: Most Pressing Data Challenge

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Transparent methodologies	18%
Measurement standards	8%
Multiple dataset dashboard	3%
Communic'n values by...	3%
Cost of measurement	0%

0% 20% 40% 60%

'All Others' Member Sample
Percent sample: Most Pressing Data Challenge

Category	Percent
Accurate attribution	35%
Transparent methodologies	26%
Measurement standards	26%
Multiple dataset dashboard	9%
Communic'n values by format	4%
Inconsistent data taxonomy	0%
Cost of measurement	0%

0% 10% 20% 30% 40%

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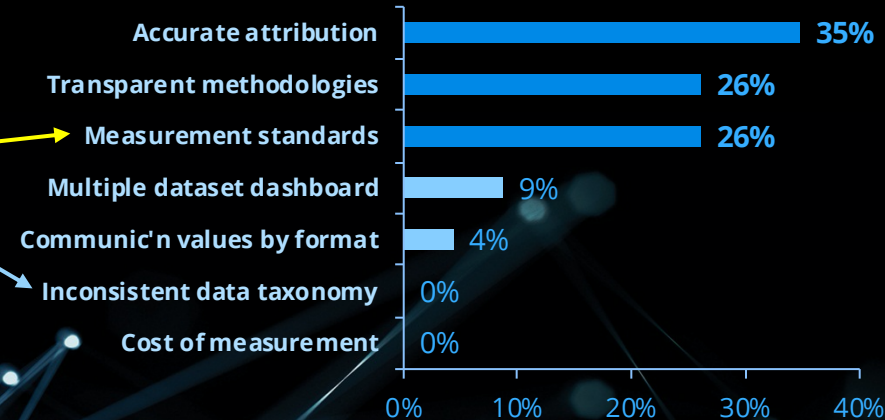
Expanding Media Investments
Top (data/other) Barriers to Adding DOOH

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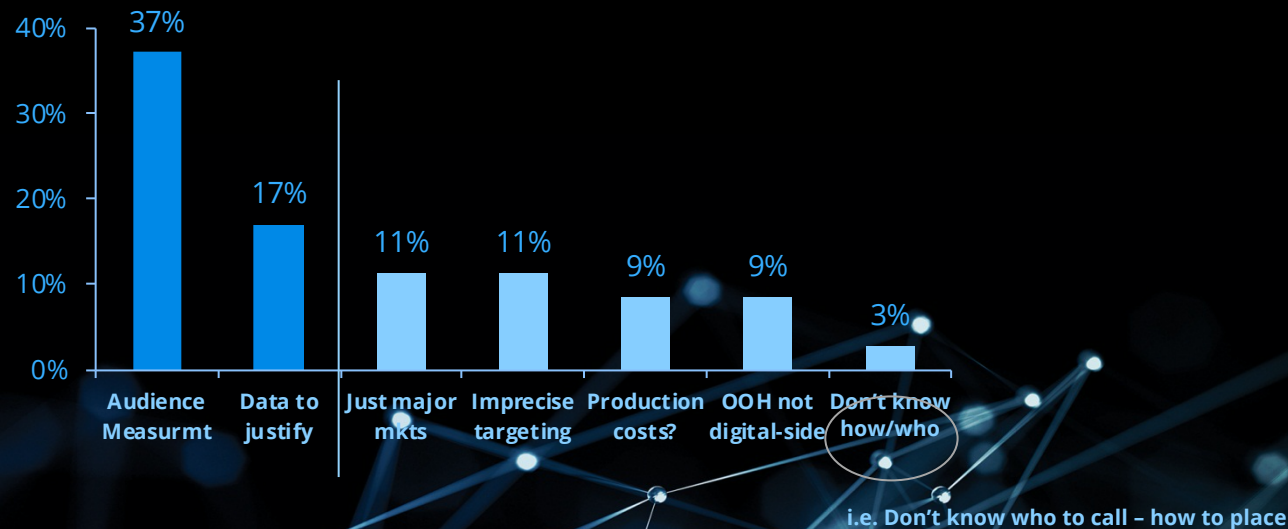
Audience Measurement Biggest Barrier

The second leading barrier… Data

Buy-side Members Sample
Percent sample: Top barriers to adding DOOH

Barrier	Percent
Audience Measurmt	37%
Data to justify	17%
Just major mkts	11%
Imprecise targeting	11%
Production costs?	9%
OOH not digital-side	9%
Don't know how/who	3%

i.e. Don't know who to call – how to place

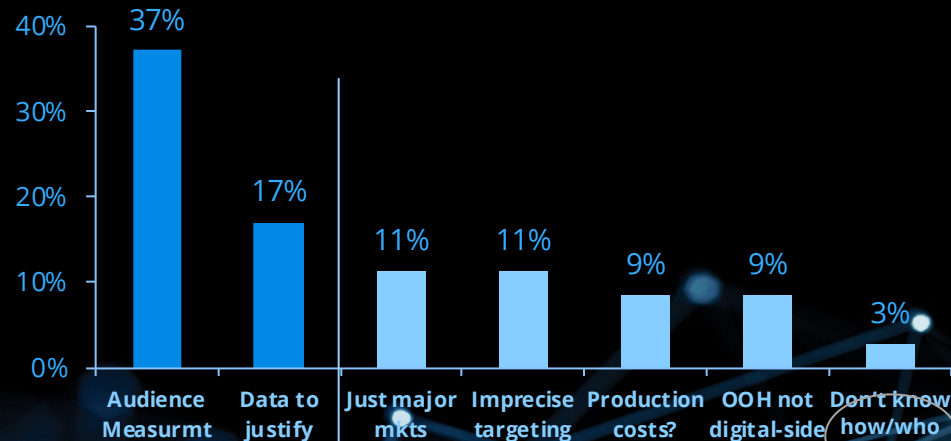IAB Canada Barometer Report on Data Disruption, 2020

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Accurate CPM's and Traffic Counts Hinge on Measurement

A call for more industry collaboration...

Buy-side Members Sample
Percent sample: Top barriers to adding DOOH

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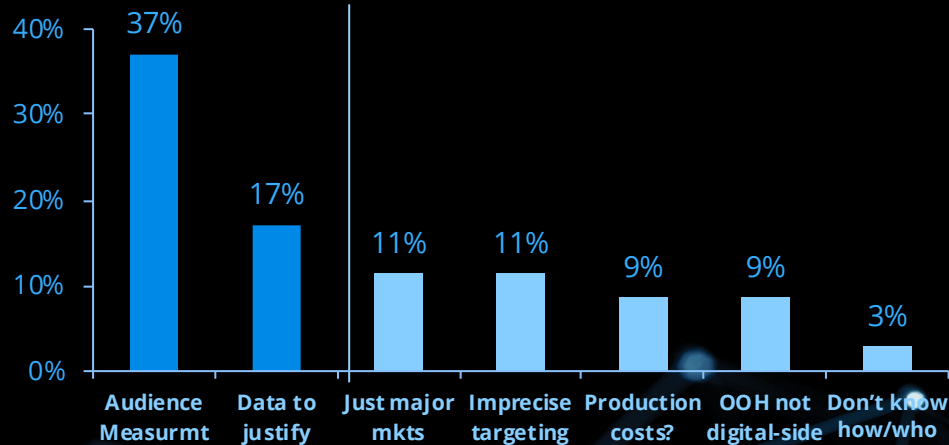i.e. Don't know who to call – how to place

"The major barrier is measurement and how to evaluate cost efficiency. Many vendors give you CPMs and traffic for the full board when you are only getting 1 spot out of that loop (if it is sold out). There needs to be some sort of partnership between IAB (Canada) and COMMB to solve this".

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Rest of Sample Adds 'Imprecise Targeting' to Mix

Buy-side Members Sample
Percent sample: Top barriers to adding DOOH

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OOH not digital-side	9%
Don't know how/who	3%

'All Others' Members Sample
Percent sample: Top barriers to adding DOOH

Category	Percent
Audience Measuremt	26%
Data to justify	26%
Imprecise targeting	26%
OOH not digital-side	16%
Just major markets	5%
Production costs?	0%
Don't know how/who	0%

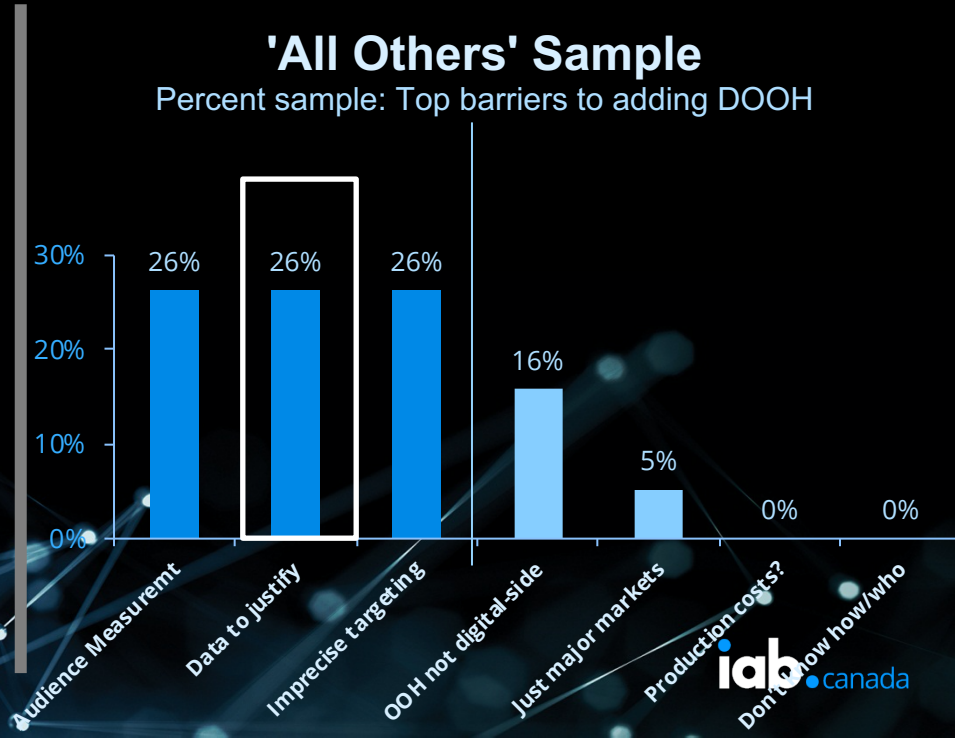i.e. Don't know who to call – how to place

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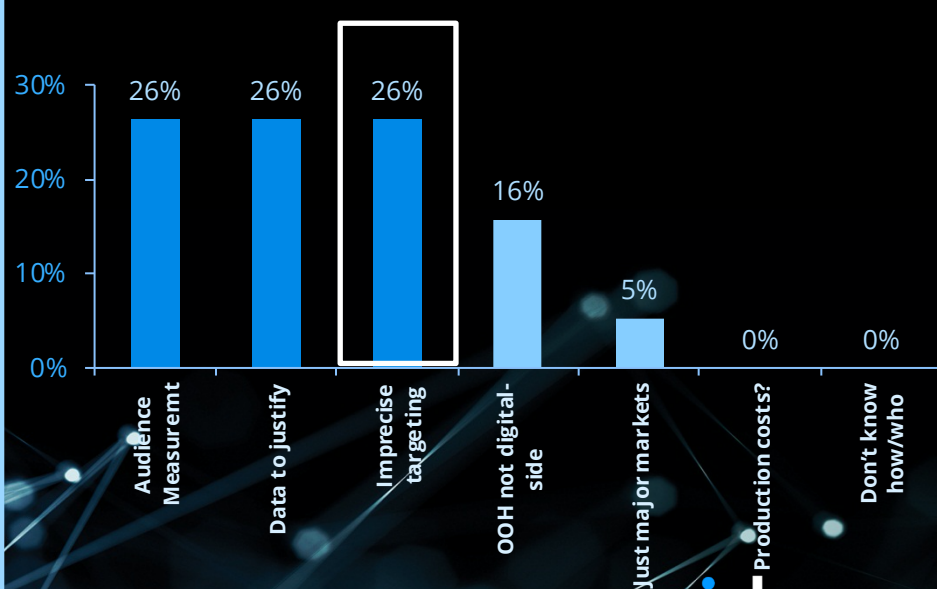
Elaborating on 'Data to Justify Investment' ...

Calls for brand-lift and other value-oriented studies to justify adding DOOH to digital media plans.

" Understanding the value, brand-lift and measurement studies have yet to happen". ".

'All Others' Sample
Percent sample: Top barriers to adding DOOH

Barrier	Percent
Audience Measuremt	26%
Data to justify	26%
Imprecise targeting	26%
OOH not digital-side	16%
Just major markets	5%
Production costs?	0%
Don't know how/who	0%

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Expanding Media Investments
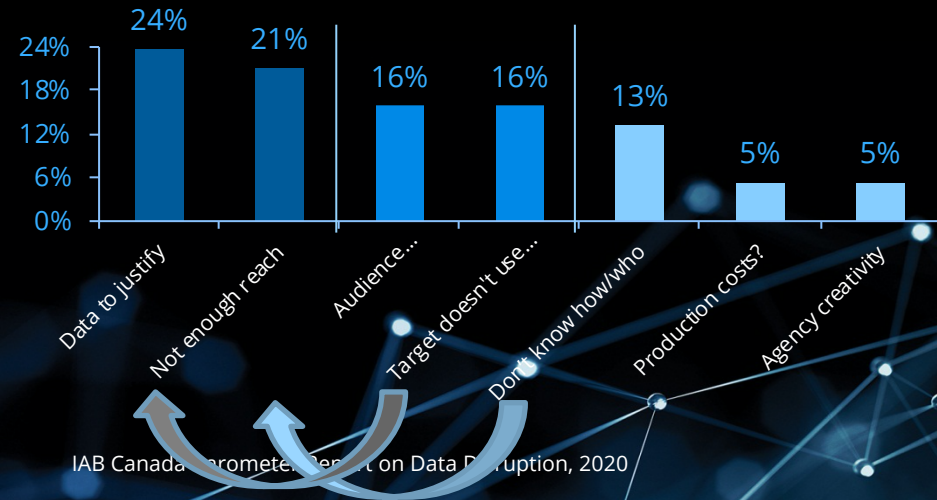# Top (data/other) Barriers to Adding Digital Audio

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Reach & Data Limitations an Impediment

Data and Reach concerns are magnified by those who think the target doesn't listen to audio and suggestions of audience measurement issues.
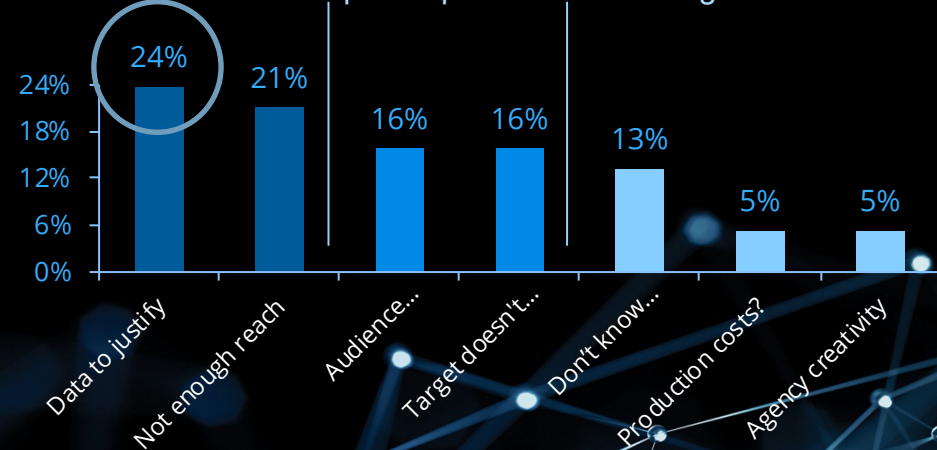
Buy-side Sample

Percent sample: Top barriers to adding AUDIO

Barrier	Percent
Data to justify	24%
Not enough reach	21%
Audience...	16%
Target doesn't use...	16%
Don't know how/who	13%
Production costs?	5%
Agency creativity	5%

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Few 'ROI' or Convincing Site Selection Metrics.

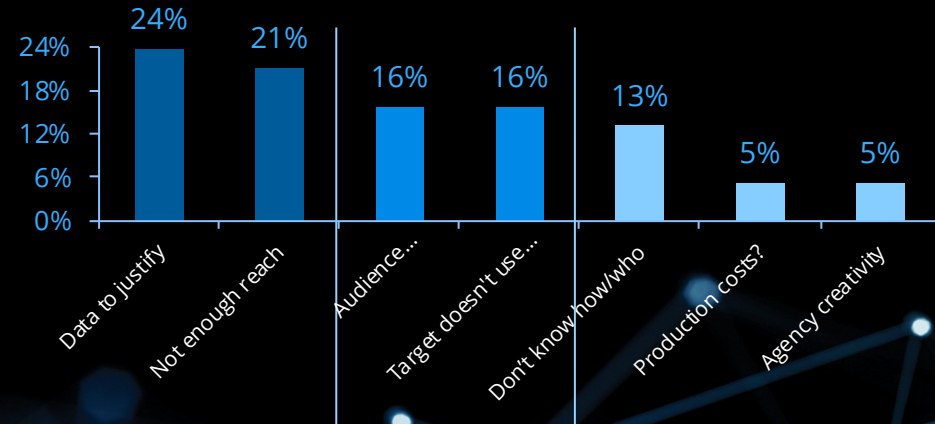## Buy-side Member Sample
Percent sample: Top barriers to adding AUDIO

"Hard to justify ROI to clients, hard to justify which streaming site is better than another".

24% | **21%** | **16%** | **16%** | **13%** | **5%** | **5%**

24% | 18% | 12% | 6% | 0%

Data to justify | Not enough reach | Audience... | Target doesn't... | Don't know... | Production costs? | Agency creativity

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Sellers/Rest of Sample Seek More Agency Creativity

"Voice requires more creative agency input – we're not there yet"

Buy-side Member Sample
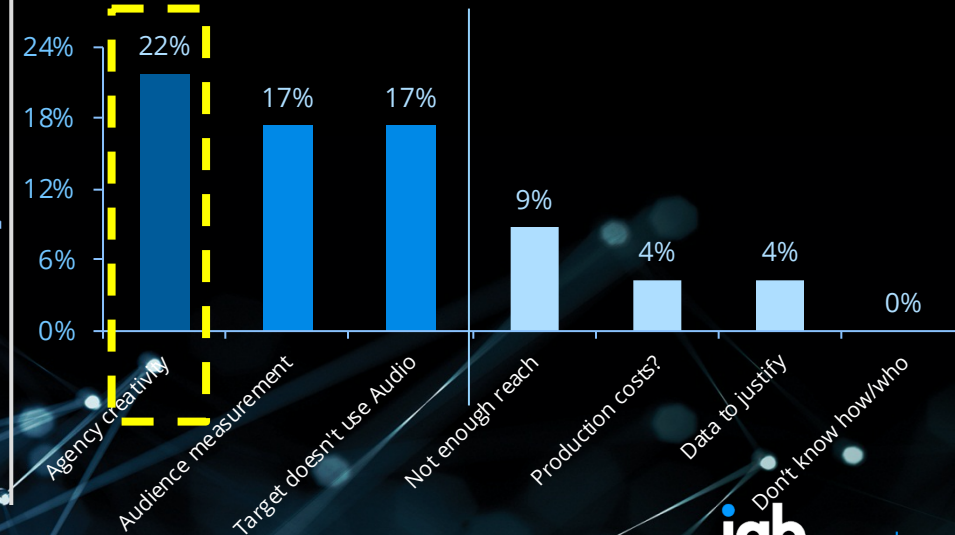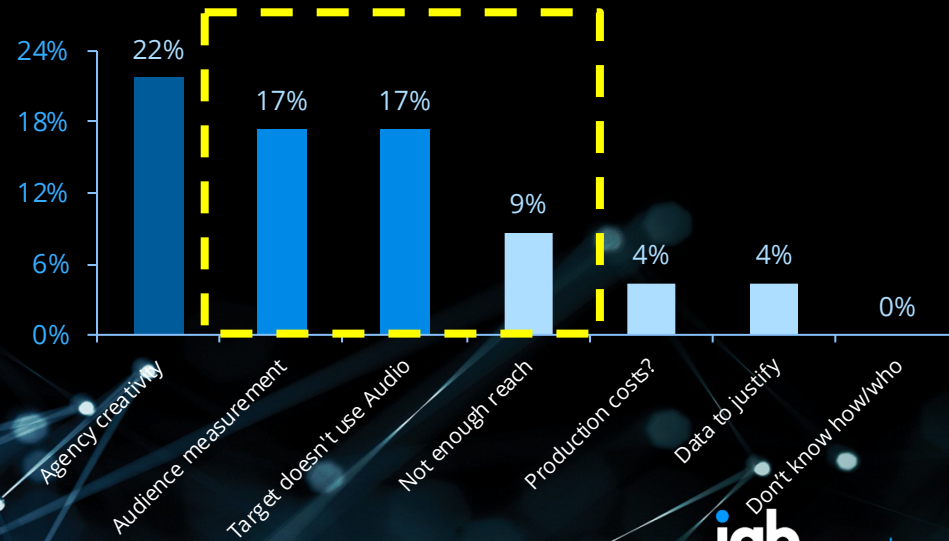Percent sample: Top barriers to adding AUDIO

	Data to justify	Not enough reach	Audience…	Target doesn't use…	Don't know how/who	Production costs?	Agency creativity
%	24%	21%	16%	16%	13%	5%	5%

'All Others' Member Sample
Percent Sample: Top barriers to adding AUDIO

	Agency creativity	Audience measurement	Target doesn't use Audio	Not enough reach	Production costs?	Data to justify	Don't know how/who
%	22%	17%	17%	9%	4%	4%	0%

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Underscoring the call for reach and targeting data.

"Size of reach and composition of audience would address the 'Somewhat serious' replies".

'All Others' Member Sample
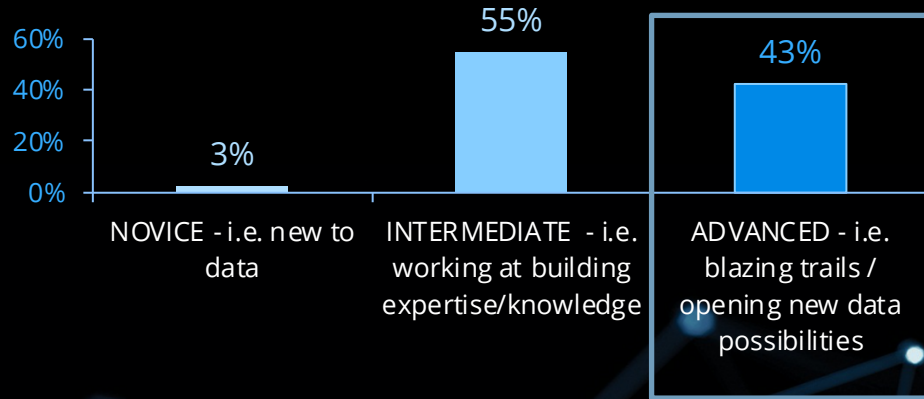### Percent Sample: Top barriers to adding AUDIO

Category	Percent
Agency creativity	22%
Audience measurement	17%
Target doesn't use Audio	17%
Not enough reach	9%
Production costs?	4%
Data to justify	4%
Don't know how/who	0%

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Data Proficiency

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Four-in-Ten *'Advanced'*

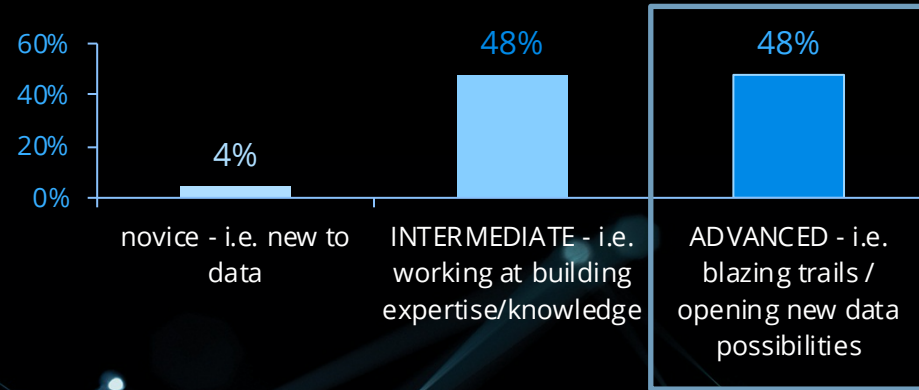Almost all respondents claim at least some level of expertise with data use.

Buy-side Member Sample
Percent of sample by data-use proficiency level

- NOVICE - i.e. new to data: 3%
- INTERMEDIATE - i.e. working at building expertise/knowledge: 55%
- ADVANCED - i.e. blazing trails / opening new data possibilities: 43%

'All Others' Member Sample
Percent of sample by data-use proficiency level

- novice - i.e. new to data: 4%
- INTERMEDIATE - i.e. working at building expertise/knowledge: 48%
- ADVANCED - i.e. blazing trails / opening new data possibilities: 48%

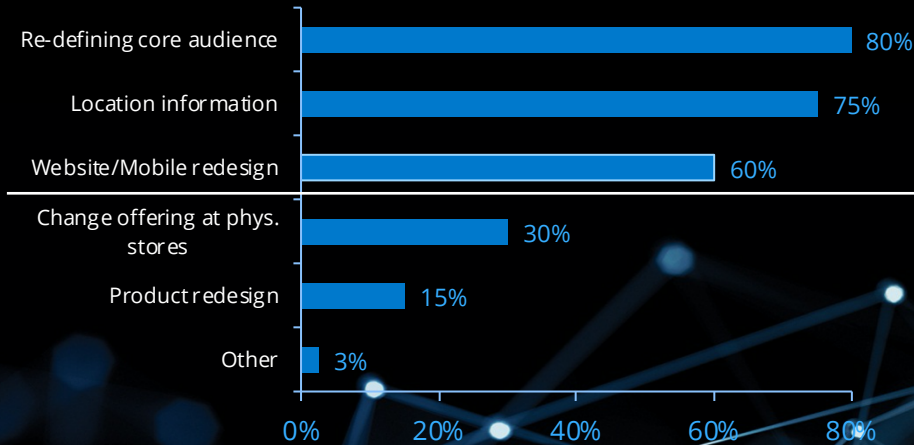IAB Canada Barometer Report on Data Disruption, 2020

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Many Using Media Data to Impact a Variety of Areas

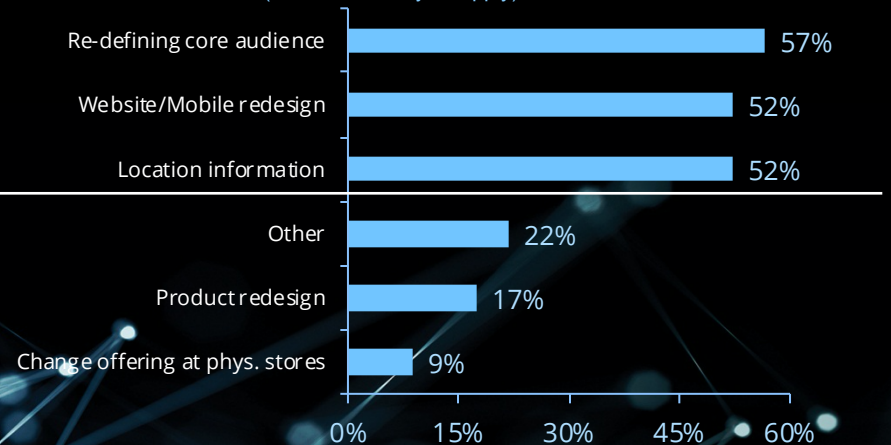Common uses are to re-define core audiences, establish locations, website redesigns.

Buy-side Member Sample
Percent sample by types of media data uses
(choose as many as apply)

Re-defining core audience	80%
Location information	75%
Website/Mobile redesign	60%
Change offering at phys. stores	30%
Product redesign	15%
Other	3%

0%   20%   40%   60%   80%

'All Others' Member Sample
Percent sample by types of media data uses
(choose as many as apply)

Re-defining core audience	57%
Website/Mobile redesign	52%
Location information	52%
Other	22%
Product redesign	17%
Change offering at phys. stores	9%

0%   15%   30%   45%   60%

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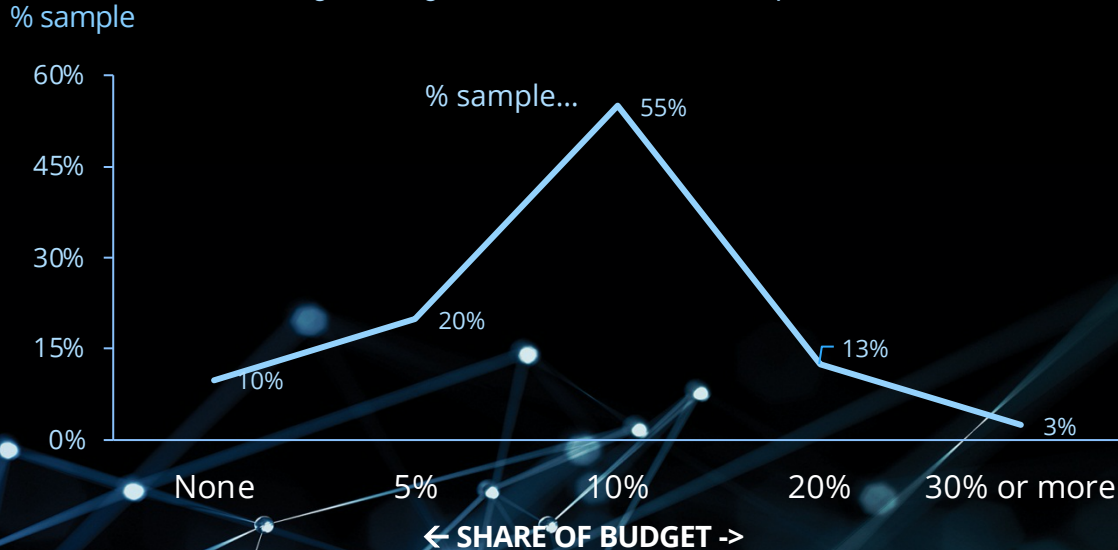
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Test, test, test…

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7 in 10 Buyers Claim to Allocate 10%+ for Testing

Overall, only one-in-ten report zero contribution to testing new formats/
platforms in their digital plans.

Buy-side Member Sample
Share of digital budget allocated to TEST new platforms/formats

% sample

% sample...

60%
55%
45%
30%
20%
15%
13%
10%
0%
3%

None   5%   10%   20%   30% or more

← SHARE OF BUDGET ->

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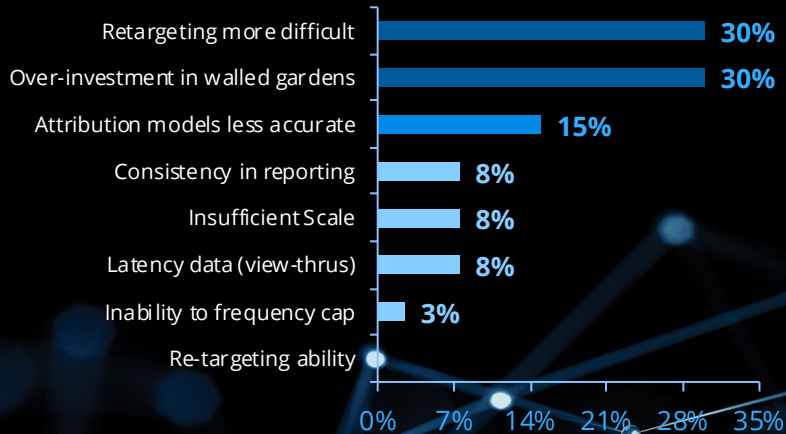
Concerns in a Cookieless Future

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Buyers No-Cookie Concerns: Retargeting and Walled Gardens

Impaired accuracy of attribution models is third among the top-3 buy-side concerns.

Buy-side Member Sample
Percent of sample by Top Cookieless Concerns

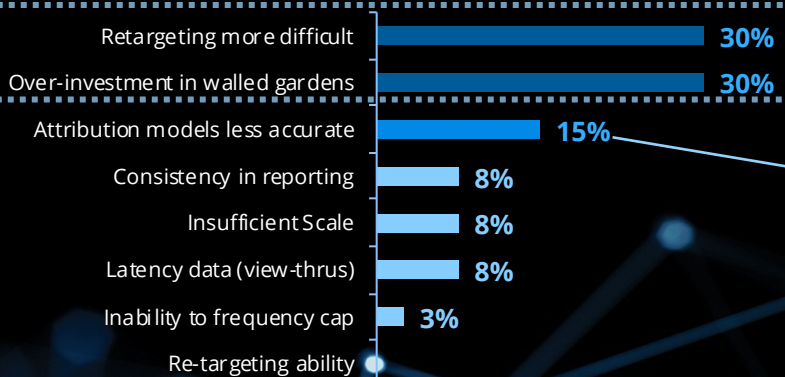| Concern	Percent
Retargeting more difficult	30%
Over-investment in walled gardens	30%
Attribution models less accurate	15%
Consistency in reporting	8%
Insufficient Scale	8%
Latency data (view-thrus)	8%
Inability to frequency cap	3%
Re-targeting ability	

0%   7%   14%   21%   28%   35%

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Walled Gardens *the* Dominant Concern for Rest-of-Sample

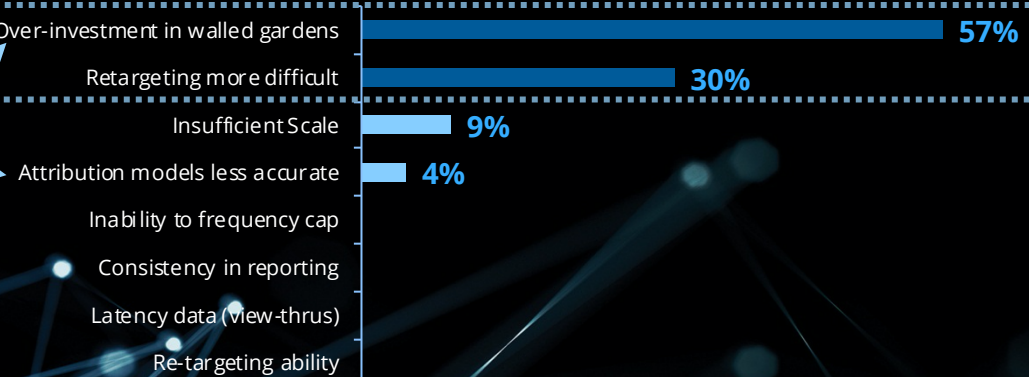These respondents do not share buyer concerns about attribution accuracy.

Buy-side Member Sample
Percent of sample by Top Cookieless Concerns

Concern	Percent
Retargeting more difficult	30%
Over-investment in walled gardens	30%
Attribution models less accurate	15%
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Re-targeting ability	

0% 7% 14% 21% 28% 35%

'All Others' Member Sample
Percent of sample by Top Cookieless Concerns

Concern	Percent
Over-investment in walled gardens	57%
Retargeting more difficult	30%
Insufficient Scale	9%
Attribution models less accurate	4%
Inability to frequency cap	
Consistency in reporting	
Latency data (view-thrus)	
Re-targeting ability	

0% 15% 30% 45% 60%

IAB Canada Barometer Report on Data Disruption, 2020
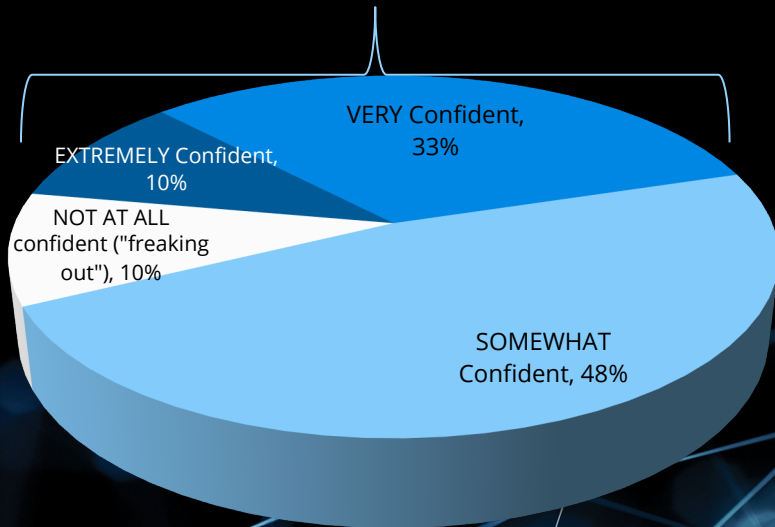
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Confidence in the Cookieless Future

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Some Confidence in Preparedness

Less confident folks can look forward to progress by IAB TechLab's newly launched 'Project Rearc' in getting stakeholders to agree on how to operate without third-party cookies.
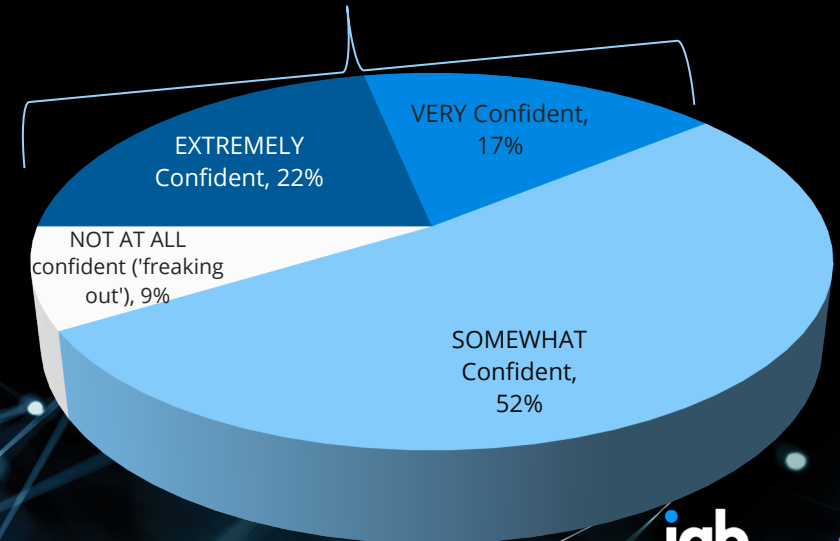
Buy-side Member Sample
Percent sample by confidence: Ready for zero-cookies Dec 2021

- VERY Confident, 33%
- EXTREMELY Confident, 10%
- NOT AT ALL confident ("freaking out"), 10%
- SOMEWHAT Confident, 48%

'All Others' Member Sample
Percent sample by confidence: Ready for zero-cookies Dec. 2021

- VERY Confident, 17%
- EXTREMELY Confident, 22%
- NOT AT ALL confident ('freaking out'), 9%
- SOMEWHAT Confident, 52%

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Optimism for the Future of Data

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Buy-siders eloquently upbeat about a 'future without cookies'

"Being able to show the full consumer journey and tie together 1 to 1 with conversions".

""That the current models our clients use, which are inaccurate, will no longer be used. We can worry about advertising properly. Right now it feels like what clients want is serving an ad to someone who was already primed to buy online".

"Better models using owned data vs relying on 3rd party models with black box methodology".

"The ability to give contextual advertising a re-birth. There are so many opportunities there if we can match content with intent".

"More reliance on pub data will allow local market pubs to better monetize content".

"Better omnichannel attribution modelling for better media mix attribution".

"Increased transparency and the ease of control for customers willing to exchange pieces of their data for added value. More personalized content, and reinvestment in 1:many mediums - that also afford advertisers audience targeting - as a way to engage audiences at scale and in a strategic way".

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Sellers & Ad Tech/Research Providers Equally Optimistic

"The most exciting aspect of the data front in Canada is the plethora of locations based data sets (Mastercard, Environics, Mobile Location), which allows for both targeting and insights that fuel strategy and inform brands about their consumers".

""Publishers are getting a new product to offer, the one the walled gardens have had for a decade".

"Data is the foundation for machine learning and the support of human efforts and endeavours through applied AI".

"Better reporting with data storytelling and visualization...if people can take the time to learn how to do it (and do it well). Data isn't necessarily the problem here...it's analysis, insights and reporting".

"Deeper conversations about value and effectiveness. Creating new possibilities that leverage multiple platforms. Working in more *high touch* executions where creativity and complexity are essential".

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Key Findings – Data Disruption in 2020

- Accurate Attribution is dominant challenge

- Audience Measurement a leading DOOH barrier for Buyers

- ROI Data & Reach limitations are the top Audio barriers for Buyers – creative not there

- Room for advancement in Data- beyond the 40% - but solid uses

- Large majority allocates digital funds to test new formats/platforms – 10% up for testing

- Cookieless concerns - weakened 'retargeting', 'over-invested' walled gardens

- Confidence in being prepared for zero cookies

- IAB TechLab's new 'Project Rearc' to help stakeholders agree how to operate without third-party cookies.

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In the Meantime...

The Industry forges ahead:

- Ad Tech Transparency white paper updated for 2020 – completed and available
- VAST/DAAST 4.1 – ready for adoption addressing verification & open measurement
- DataLabel.org – explore it
- New MRC Fraud detection guidelines released for public commentary
- IAB Canada is kicking off "Gold Standard" discussions that take on an open-sourced baseline approach to acceptable ad inventory – lessening the confusion and the tyranny of choice
- Check out the IAB Canada industry white paper "Moving Towards Cookie Independence" and IAB TechLab's new 'Project Rearc'

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Data Integrity is top challenge to Supply Chain

IAB Tech Lab Data Transparency Initiative

1. Who
Provided the data segment

2. What
Audience segment the label describes

3. How
The segment was constructed

4. Where
The original data components were sourced

Data Transparency Facts

Data Distributor Name: **Data Company**
Data Distributor Contact: DataSolutionTeam@data.com
Data Provider Name: **Leasing Company**
Data Provider Contact: DataAccounts@leasingco.com

Audience Snapshot	
Branded Name	Auto Intenders – Six Months
Standard Name	Auto Intenders
Audience Description Households likely in the market to purchase a new vehicle in the next six months	
Geographies	USA

Audience Construction	Attributes
Audience Count	6,500,000
Precision Level	Households
Activation ID(s)	Cookies
Audience Expansion	Yes
Cross-Device Expansion	Yes
Last Refresh Date	02-Jan-2018
Event Lookback Window	60 Days

Data Source	Attributes
Source ID Description Dealer-reported names and postal codes of individuals who requested test drives	
Source ID Contribution	1,130,000
Precision Level	Individual
ID Key	Name and Postal
Source Event	Transactions
Inclusion Method	Observed
Seed Size (if modeled)	-
Source Refresh Frequency	Quarterly
Event Lookback Window	180 Days

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

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Thank you for supporting IAB Canada

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