



iab•canada

Enterprise

Charting the New Digital Constellations

April 25, 2024

The Great Hall, Toronto

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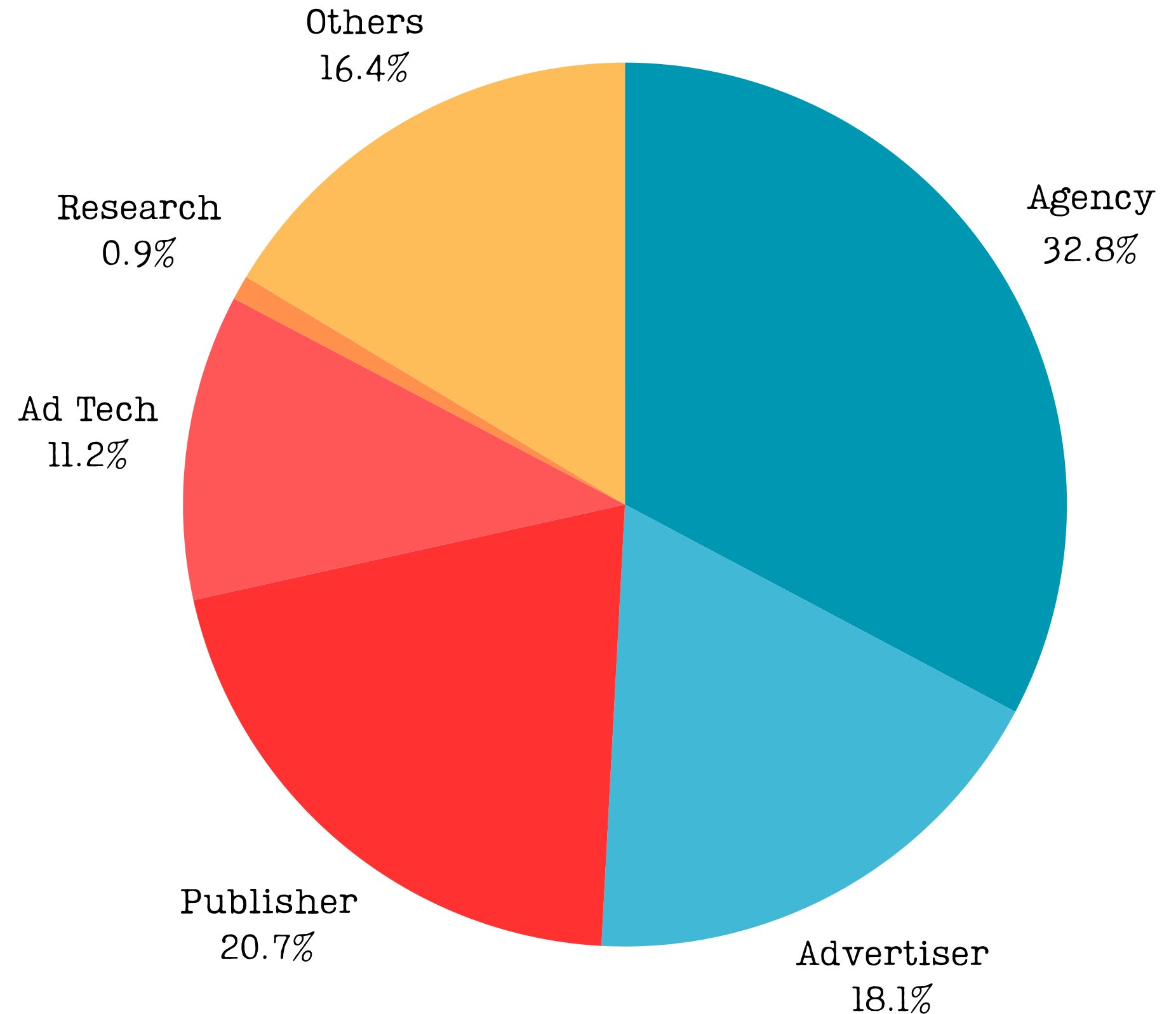
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Introduction

IAB Canada's recent Enterprise Event rallied the Canadian digital advertising community to tackle the industry's most pressing challenges – AI, Sustainable Advertising and Addressable Reach. Held at Toronto's iconic The Great Hall, the event fostered collaborative discussion with IAB Canada members as well as panel discussions led by industry leaders.

A near equal split between the buy & sell-side

The Enterprise survey yielded 116 responses across all stakeholder groups in the digital media value chain. The majority of participants identified as Agency-affiliated (32.8%), followed by those representing Publishers (20.7%).



Industry Challenges:



Artificial
Intelligence



Sustainable
Advertising



Addressable
Reach



89%

currently or
planning to
roll-out AI

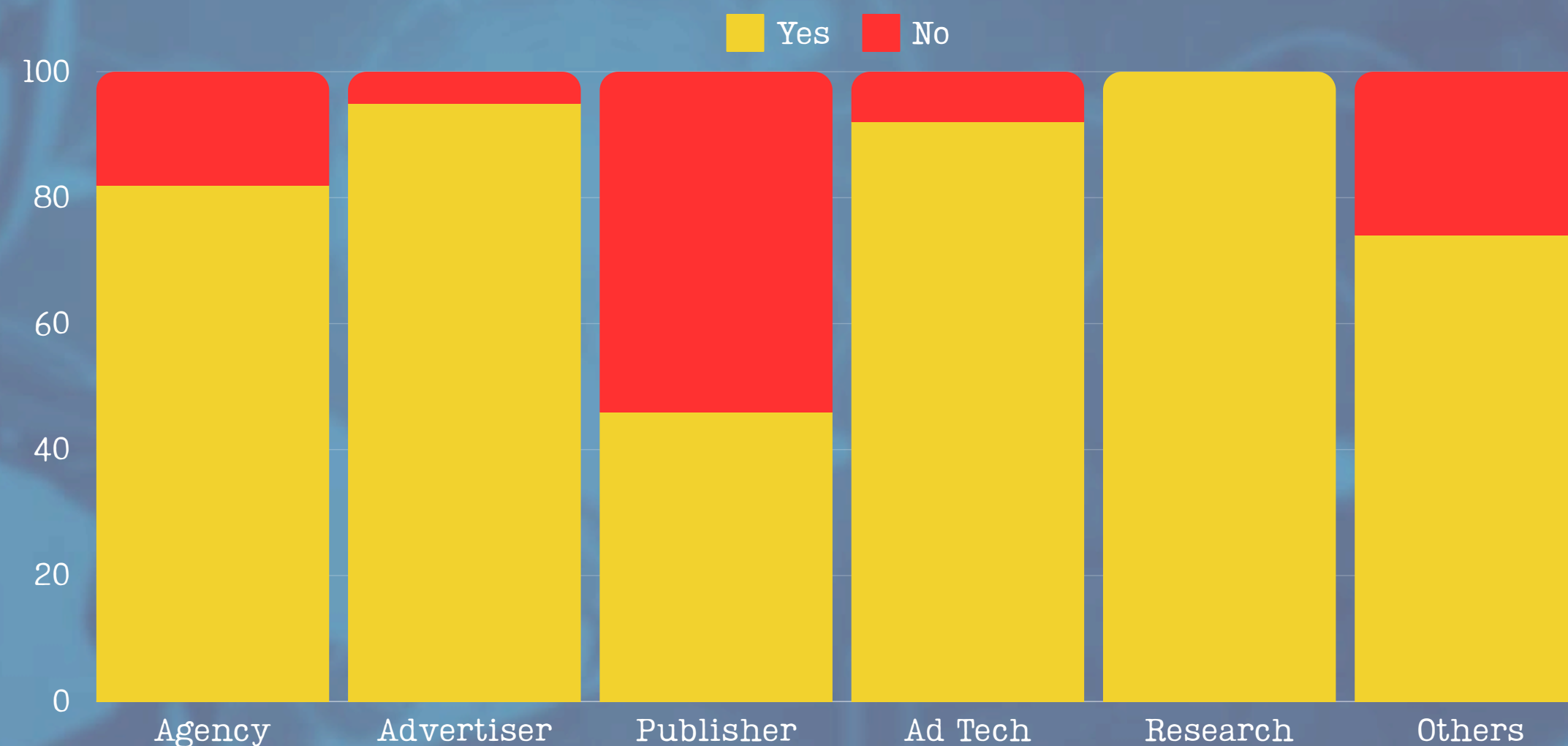
A significant majority of respondents indicate they are either currently implementing AI solutions or plan to do so within the next six months. This trend signifies a shift towards AI becoming a standard practice within their workstreams.


Most stakeholder groups report active AI implementation

Advertisers leading the charge at 95.2% adoption of AI.

Publishers show a notably lower adoption rate at only 45.8%.

Currently or planning to roll-out AI in their workstreams (%)



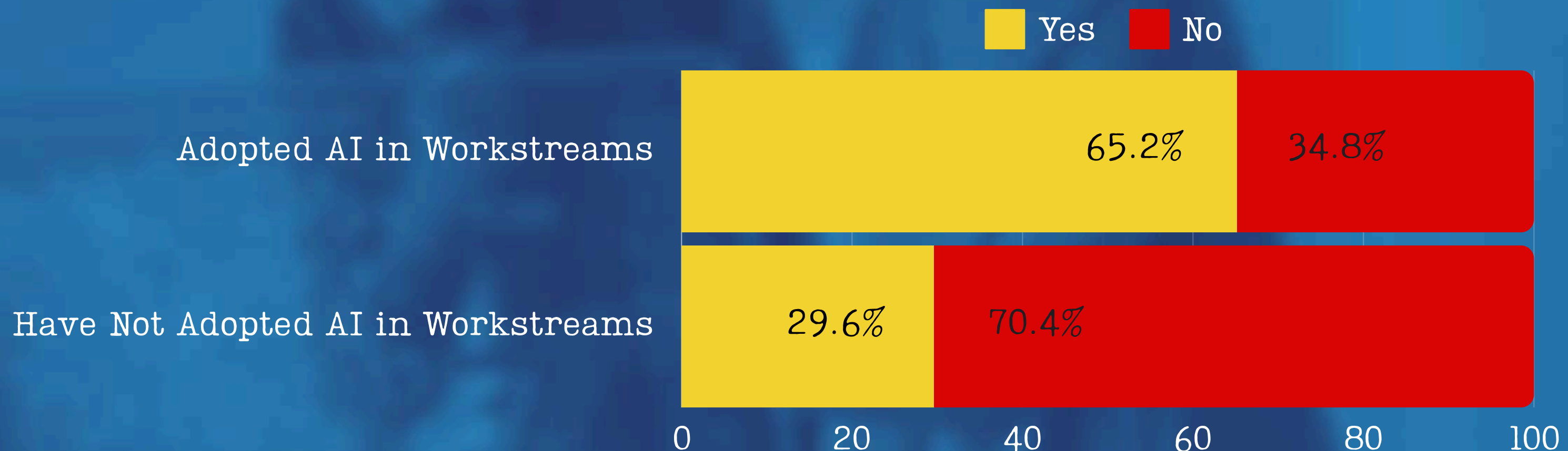
A man and a woman are looking at a large digital screen in a modern office setting. The screen displays a complex network diagram with many nodes and connections. The man is pointing at the screen with his right hand, and the woman is looking at it with a focused expression. The background shows a bright, modern office with large windows and a grid ceiling.

57%

of our community
sense imminent
changes to their
specific job
because of AI.

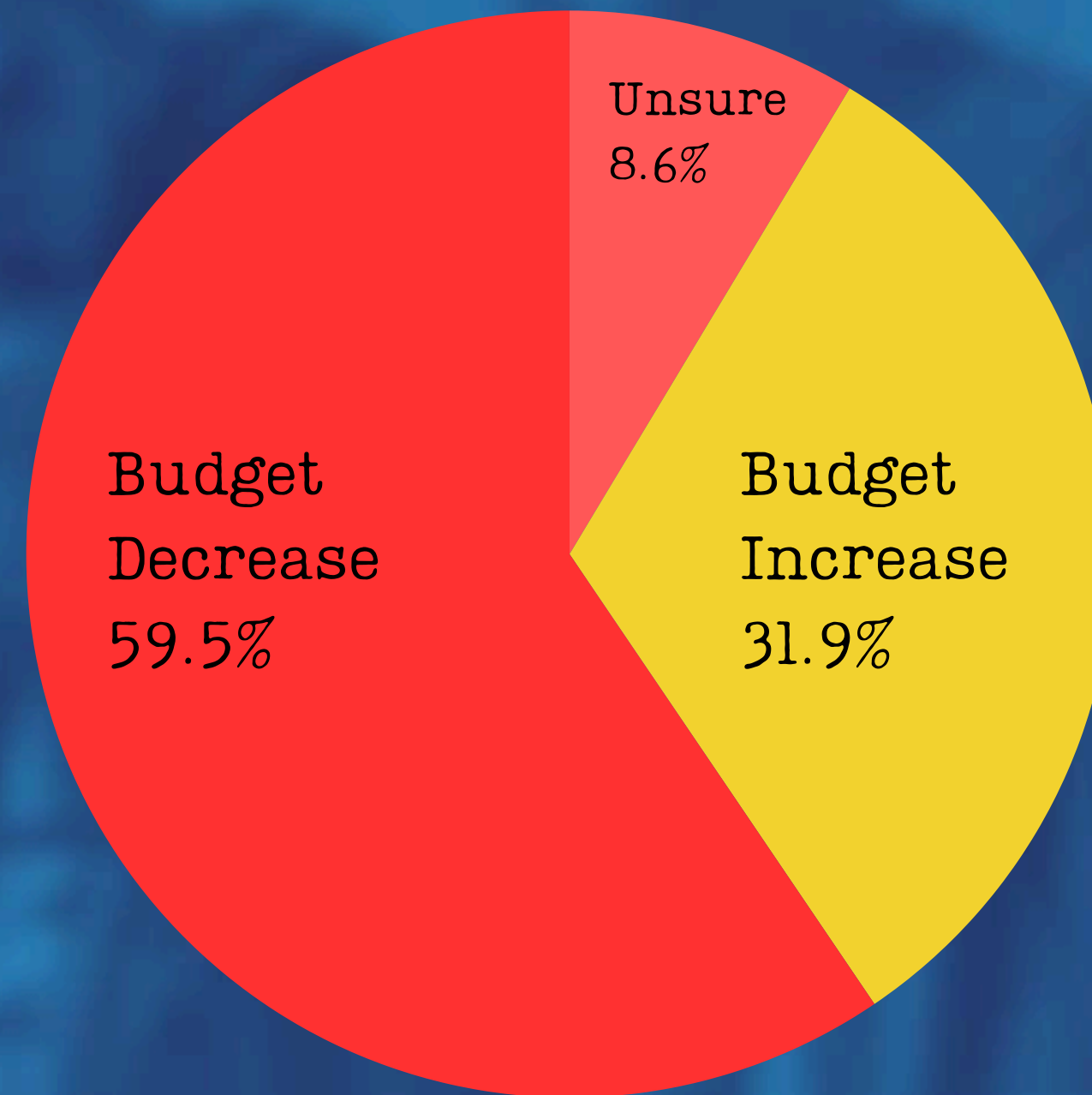
Respondents who have already adopted AI express a stronger sense of impending change

Sense imminent changes to specific job because of AI.



More than half of the respondents anticipate a decrease in creative production budgets

The ability of AI to generate creative content at scale and a lower cost is seen as a key factor in streamlining production processes and potentially decrease budgets.



Costs associated with AI Investments and training are seen as factors that may increase production budgets.



AI Revolutionizes Advertising

The community took on the challenge of scrutinizing AI and its viability to the Advertising Industry. The thoughts of the community were crystalized in a panel discussion led by [Sahil Razdan](#) from Postmedia, industry experts [Brian Danzis](#) of Seedtag, [Matt Rivard](#) from Google Canada, [Robin LeGassicke](#) representing Cairns Oneil, and [Terra Richardson](#) from Zefr.

AI's Transformative Potential

A resounding theme from the discussion was the potential for AI to revolutionize operational efficiency across the advertising landscape. From streamlining supply chains and financial processes to optimizing media buying, AI's ability to automate mundane tasks and analyze large volumes of data promises a more efficient future.

However, there are nuanced challenges and ethical considerations that accompany AI's integration. While some envision AI as a "smart intern" capable of handling menial tasks and freeing up human talent for more strategic pursuits, others expressed concerns about job displacement and the need for responsible implementation.

"Just because we can use AI, should we?"

Heard from the community



Upskilling and the Evolving Workforce

The community stressed the importance of education and training to prepare workers for the AI-driven job market. They noted that AI-powered, personalized learning could significantly speed up the upskilling and reskilling process. While acknowledging AI's potential to automate routine tasks, participants emphasized that human strategic thinking would remain essential for success. The best way to harness AI's full potential must focus on AI augmenting human work and automating routine tasks to free up teams for higher-level strategy.

"You can take advantage of these shifts, or the shifts can take advantage of you."

Heard from the community



Policy, Ethics, and Bias

Developing clear AI policies and ethical guidelines was deemed crucial, especially as government regulations may lag behind technological advancements. The importance of responsible AI use, data privacy, and partner compliance were highlighted. Participants also emphasized the need for transparency in AI algorithms and the importance of addressing and mitigating biases to ensure fair and accurate outcomes.



Investment & the Future of Work

Investing in AI technology is a critical consideration for businesses, but the rapid pace of innovation raises concerns about potential obsolescence. Striking a balance between upfront investment and long-term value requires careful evaluation. The ethical implications of AI-driven job displacement and the need for thoughtful workforce transitions were also emphasized.

Data as the Foundation

High-quality data is essential for effective AI models. Robust data management and proactive efforts to minimize bias in datasets are necessary for fair and inclusive outcomes.

"Garbage in,
Garbage out."

Heard from the community



Sustainable Advertising Ecosystem is...



Key Themes of Sustainability

Measurement

The ability to measure the impact of advertising campaigns on the environment is a recurring theme. This suggests a desire for concrete data to track progress and hold stakeholders accountable.

The emphasis on measurability may also signal that the industry is moving beyond simply talking about sustainability and is starting to focus on acting.

Submitted responses that align with Measurability include Measurability, Measurable, Measurement, Measure Carbon footprint, Measure Carbon footprint of programmatic, Measure emissions created in delivery of ads



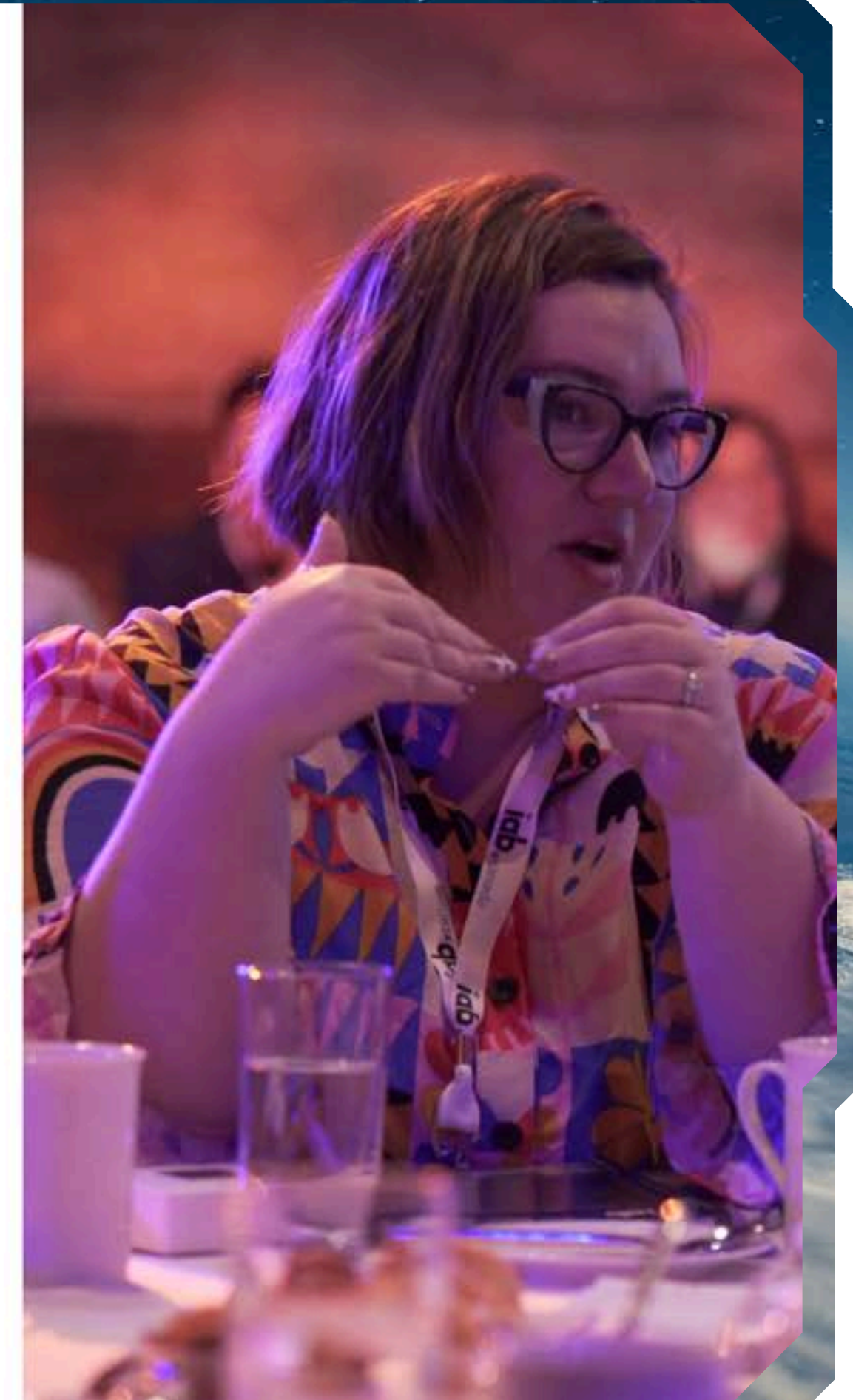
Key Themes of Sustainability

Transparency

Respondents emphasized the importance of transparency in the advertising industry. In the face of increased requirements for data disclosures due to regulation and other technical constraints, the industry finds itself with a surge in data transmissions within the programmatic landscape (consent signals, ID solutions and fraud detection, etc.).

Transparency about the environmental impact of ad campaigns was naturally cited as a concern.

Submitted responses that align with Transparency include Data transparency, transparency [is] necessary but true impact on environment is unclear, Fragmentation



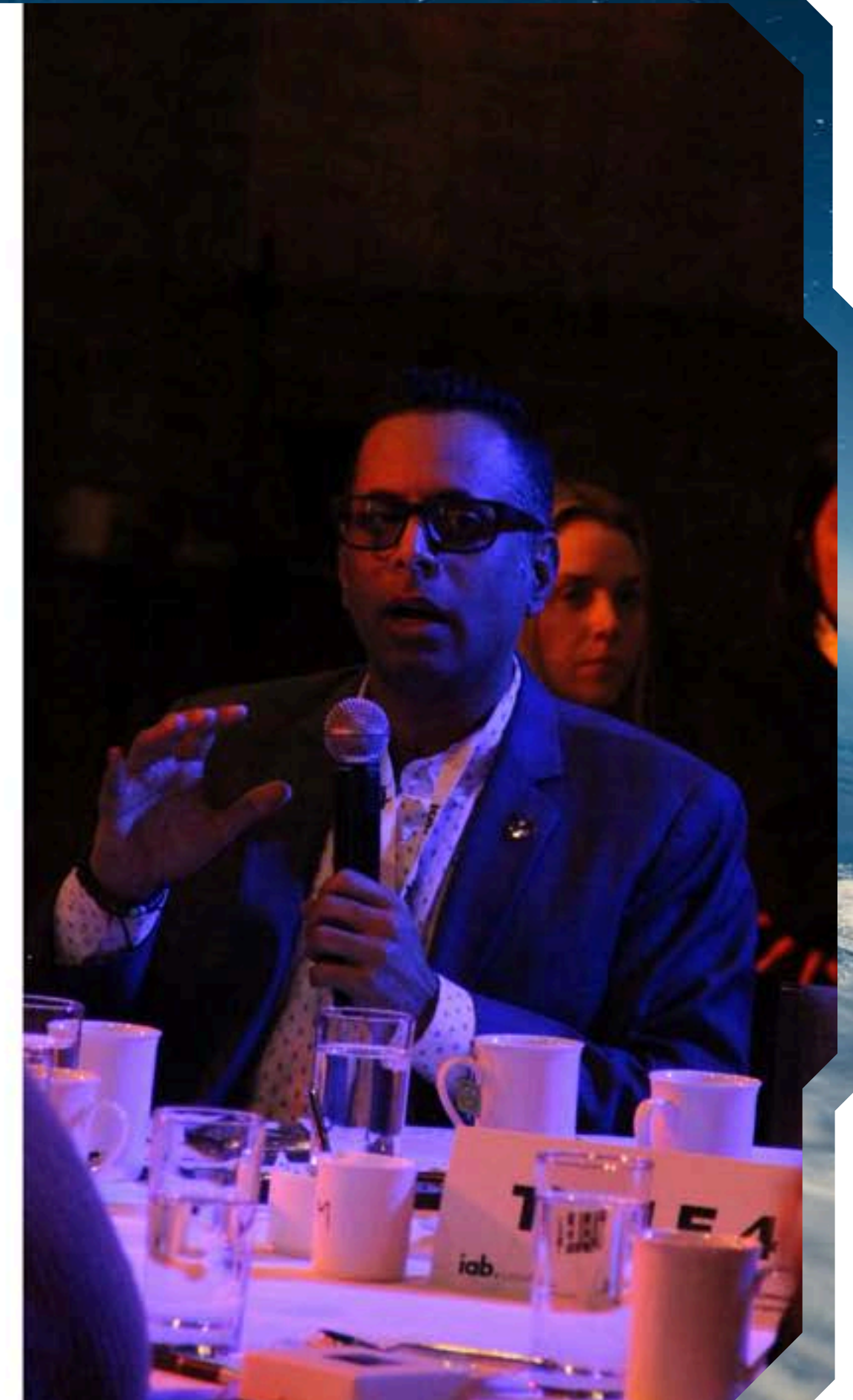
Key Themes of Sustainability

Efficiency

Reducing waste and improving efficiency were also common themes. This could involve streamlining ad operations, reducing energy consumption, and minimizing wasted impressions. The industry is looking for ways to reduce its environmental footprint without sacrificing effectiveness.

Submissions aligned with Efficiency:

- Automation
- Gaining Efficiencies
- Efficient and Everlasting
- Longterm strategies with constant marketing efforts instead of bursts.
- Longterm approaches that have minimal ops expenses but have longevity
- Media Waste
- Mindful Choices
- Mindful spending investment
- Minimal carbon footprint
- Reduced bandwidth
- Simplifying
- Waste reduction / Supply Chain Efficiency
- Wasted impressions
- Energy usage associated with servers and electric waste
- Artificial Intelligence



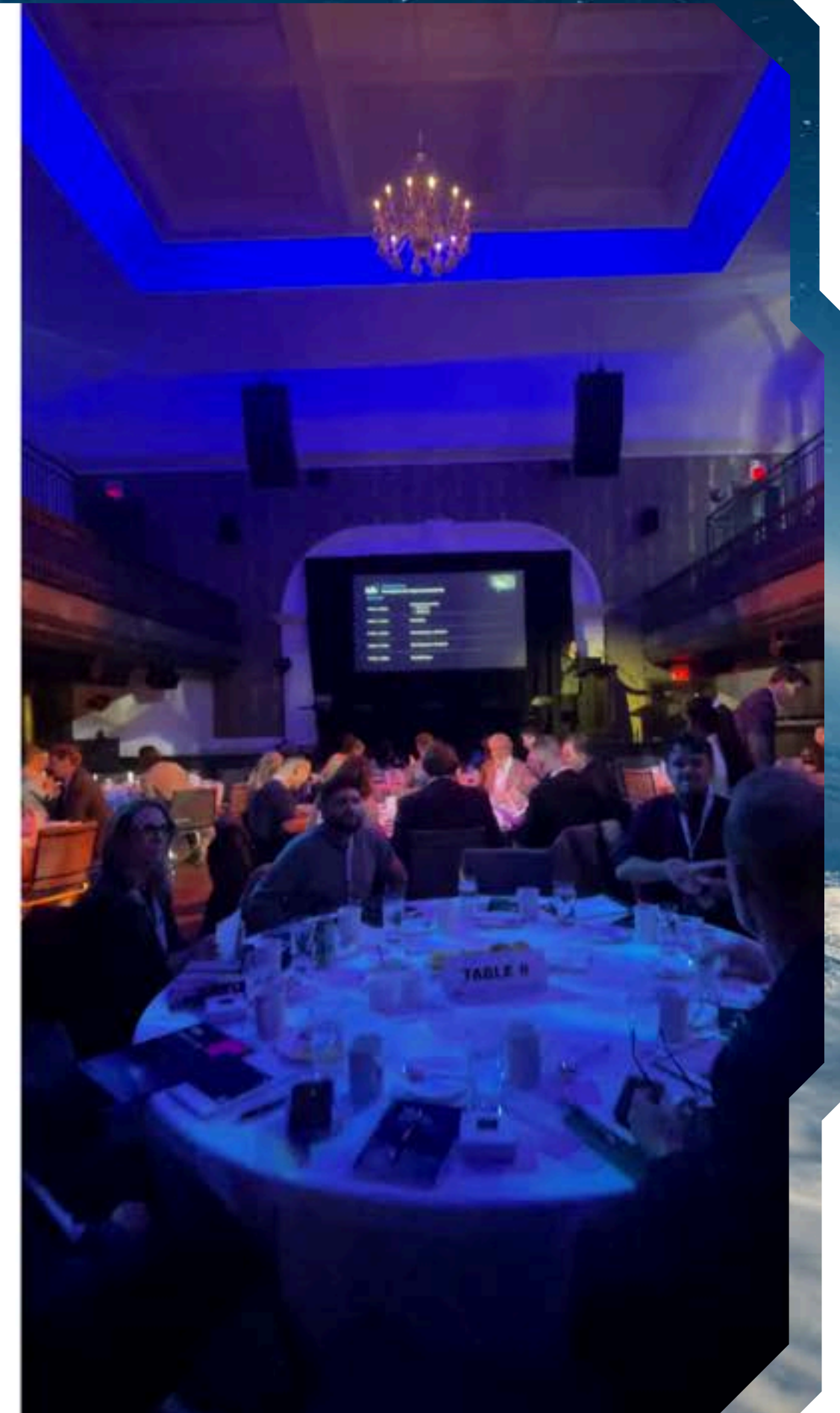
Key Themes of Sustainability

Shared Responsibility

A sense of shared responsibility for sustainability emerged from the responses. This suggests a recognition that all stakeholders in the digital advertising industry have a role to play and that there is a willingness to collaborate on solutions.

Submissions aligned with Responsibility:

- A shared responsibility
- Advertising in line with climate change challenges we need to tackle as a society
- Beneficial to all stakeholders
- Commitment
- Compute Implications, Impact to people (housing travel etc), Disruption in Value Chain
- Jobs are still viable
- Responsible Advertising
- Carbon Offset
- Solutions that work for both advertisers and the publishers
- Supporting quality journalism
- Unsustainable goals – ad industry should align/promote
- Cohesive, integrated, future-proof, customer-centric
- Green PMPs
- A system that meets today's needs and is set up for success for tomorrow's need



Sustainability Topics Level of Urgency and Focus





Rethinking Sustainability

We challenge the community to redefine what sustainability means for them and for industry. Underscored by a panel led by, [Fil Lourenco](#) (Dentsu Media) with leaders which included [Gah-Yee Won](#) (Intuit), [Julie Kerr](#) (CBC & Radio Canada), [Megha Wadhwani](#) (Sharethought) and [Danyal Syed Ali](#) (Ikea Canada), the community challenged traditional definitions and metrics of Sustainability and explored how to prioritize it alongside business objective.

Jobs in Transition

There is a general consensus that new skills will be needed to participate in the AI economy. AI may create more jobs in some sectors while eliminating others such as lower entry-level positions that are more likely to be automated.

Upskilling, adaptability, and valuing diverse human experiences will be vital for the workforce in this transition.

"Skills can be acquired, but the actual human, that's where the real magic is."

Heard from the community



Invest in Canadian Media

The industry needs to invest in domestic media, particularly supporting journalists and a wider range of Canadian content creators. There is a call for more direct sales with domestic publishers, and also a call for transparency in investments to ensure demonstrable support in Canadian content. There is also the need to focus on truly defining "domestic" media as the term holds some complexity.

The potential threat of AI-generated news to domestic media requires our industry to focus on clearer success metrics, prioritizing real goals over platform vanity metrics.

Inspiration might come from stricter regulations, as seen in Europe.



AI's Impact to Sustainability

While AI offers efficiency, its carbon footprint is a growing concern. The industry must find a balance between AI's benefits and its impact on sustainable development and deployment.

On the other hand, using AI to identify smarter ad placements can reduce waste and carbon footprint.

AI-generated influencers are becoming a concern, and there is a need for transparency about their use.

The community recommends both corporate ethics and governmental regulations are needed to ensure sustainable and responsible AI development and use.



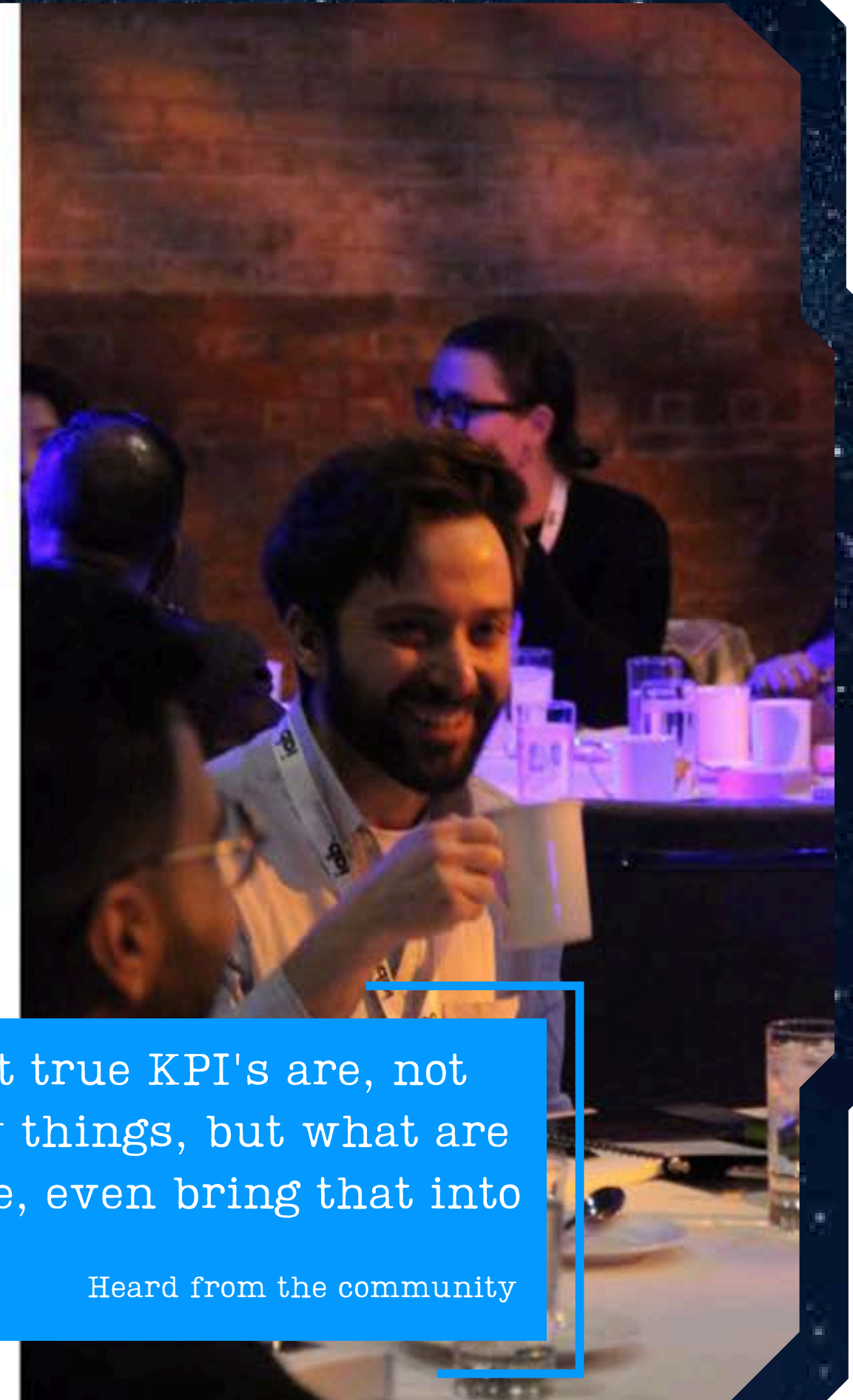
Balancing Profits and Purpose

Marketers grapple with the tension between client demands for immediate results (ROI) and longer-term sustainability goals.

Clients are increasingly asking about the sustainability of media investments. It is important to define clear KPIs (key performance indicators) to measure the success of media investments. The industry needs to rethink KPIs, question authenticity in AI-generated content, and prioritize human judgment to navigate these challenges responsibly.

"We need to understand what true KPI's are, not metrics, not platform vanity things, but what are we actually trying to achieve, even bring that into our investments."

Heard from the community



A background image featuring several Star Wars spacecraft, including the Millennium Falcon and TIE fighters, flying through a hazy, orange-brown space environment. The ships are arranged in a diagonal line from the top left towards the bottom right.

4 – Audio (6%)

3 – Branded Content (12.1%)

2 – Influencer Content (12.9%)

1 – Video (51.7%)

5 – Paid Socials (4.3%)

Top formats in terms of delivering
meaningful reach and engagement

6 – DOOH (2.3%)

7 – Social Post (1.7%)

8 – Paid Search (1.7%)

9 – Display (0.9%)

10 – Others (6%)



Engaging Audiences in a Privacy-First World

This workshop session tackled the challenge of balancing privacy concerns with effective audience outreach. The following are insights gleaned from the Workshop and the Panel Discussion moderated by [Sean Dixon](#) (Omnicom Media Group), and includes the following Panelists: [Brian Batenburg](#) (Globe Media Group), [Joyce Lee](#) (Roku), [Ryan Fuss](#) (Stingray Advertising) and [Scott Mitchell](#) (Vistar Media).

AI as an Enhancement to the Advertising Process & Creativity

AI is seen as a powerful tool to augment human creativity and decision-making, not as a full replacement. The emphasis is on using AI strategically. Key areas for AI application include: Data analysis and audience segmentation; A/B testing of creative concepts; and faster ad iteration through dynamic creative optimization.

The challenge is that AI technology is still evolving and may not be consistently effective. There are ethical considerations around transparency and user privacy. Internal structures can also hinder AI implementation.



"AI video creative is here. If anyone is working in creative, be afraid."

Heard from the community

The Growing Importance of Creativity

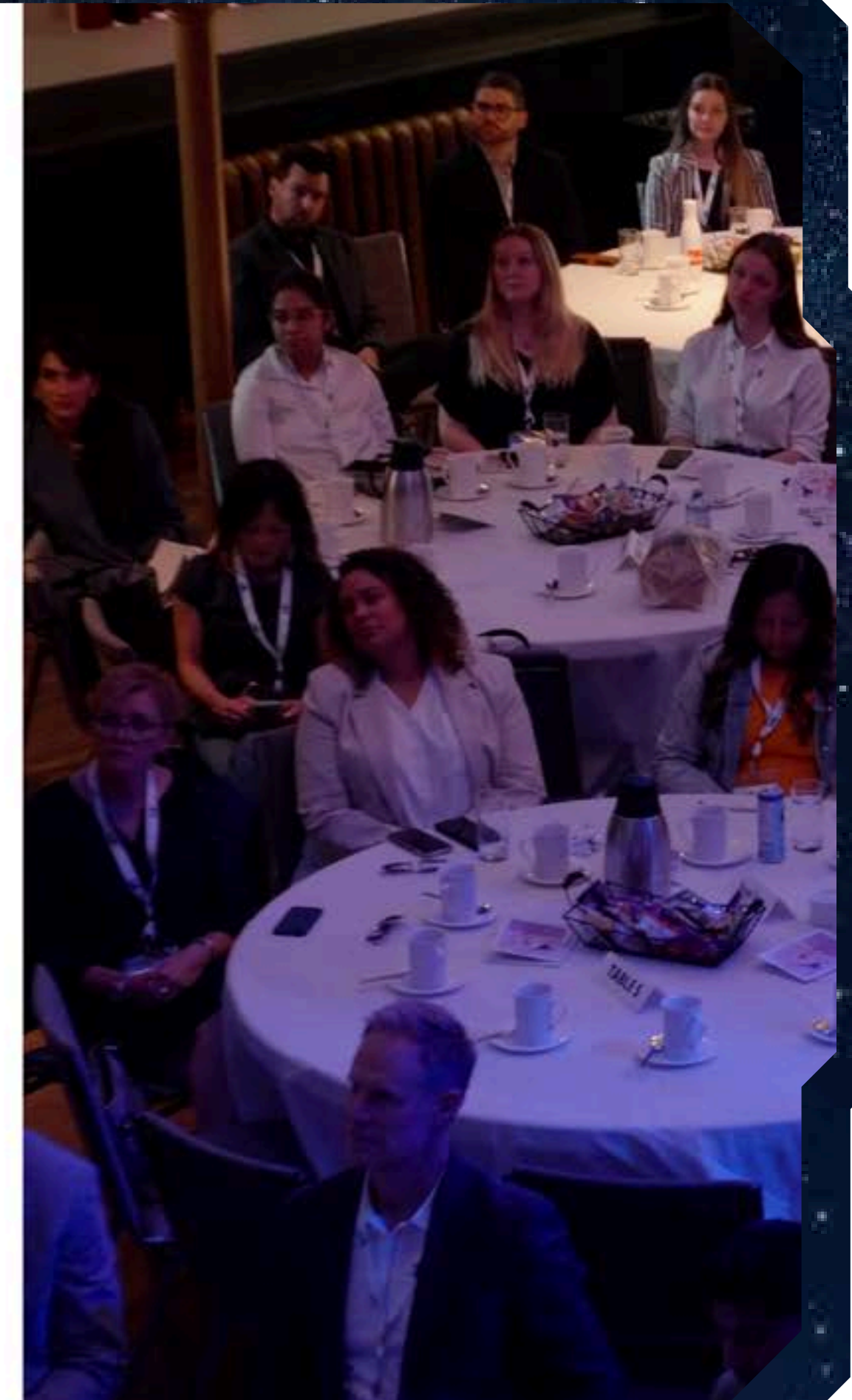
Highly personalized ads, compelling creative, and aligning ads with the right context are essential to resonate with audiences. This includes exploring both traditional formats (like sponsorships) and emerging opportunities like Connected TV (CTV).

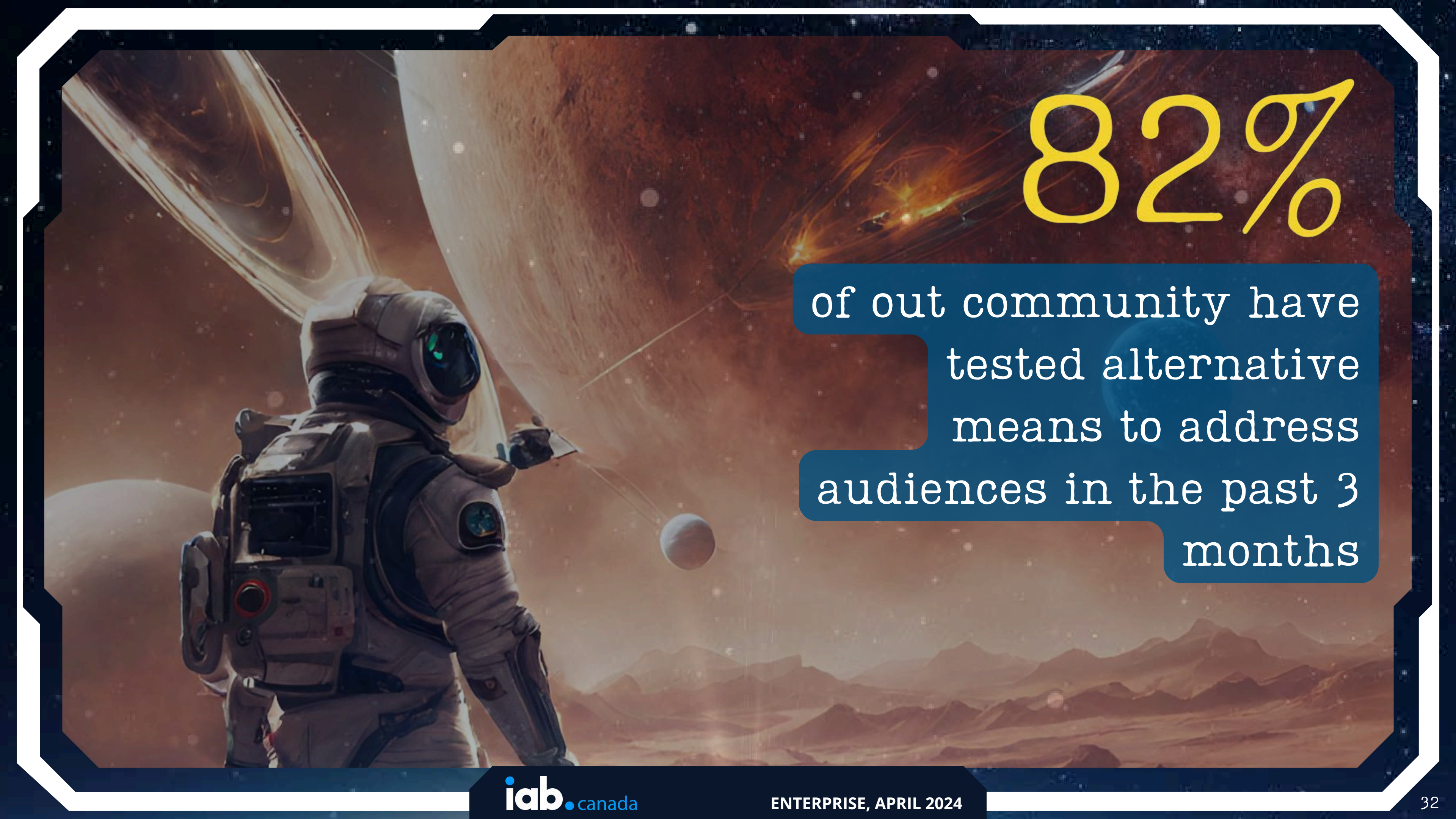
Bold creative concepts with strong brand storytelling are crucial for grabbing attention. Data-driven relevance is key — ads should be tailored to specific audiences and enhance the user experience, not interrupt it. Traditional methods like sponsorships sees a resurgence alongside innovative formats like shoppable ads.



CTV – A Steadily Growing Opportunity

CTV advertising is seen as an opportunity to enhance the viewing experience rather than disrupt it. High completion rates and user engagement are potential benefits of CTV ads. Data targeting on CTV needs to balance relevance with privacy concerns.





82%

of our community have
tested alternative
means to address
audiences in the past 3
months

Top options for cookie independence

1
Clean Rooms /
ID Solutions
(32.4%)

2
Contextual
Placement
(27.5%)

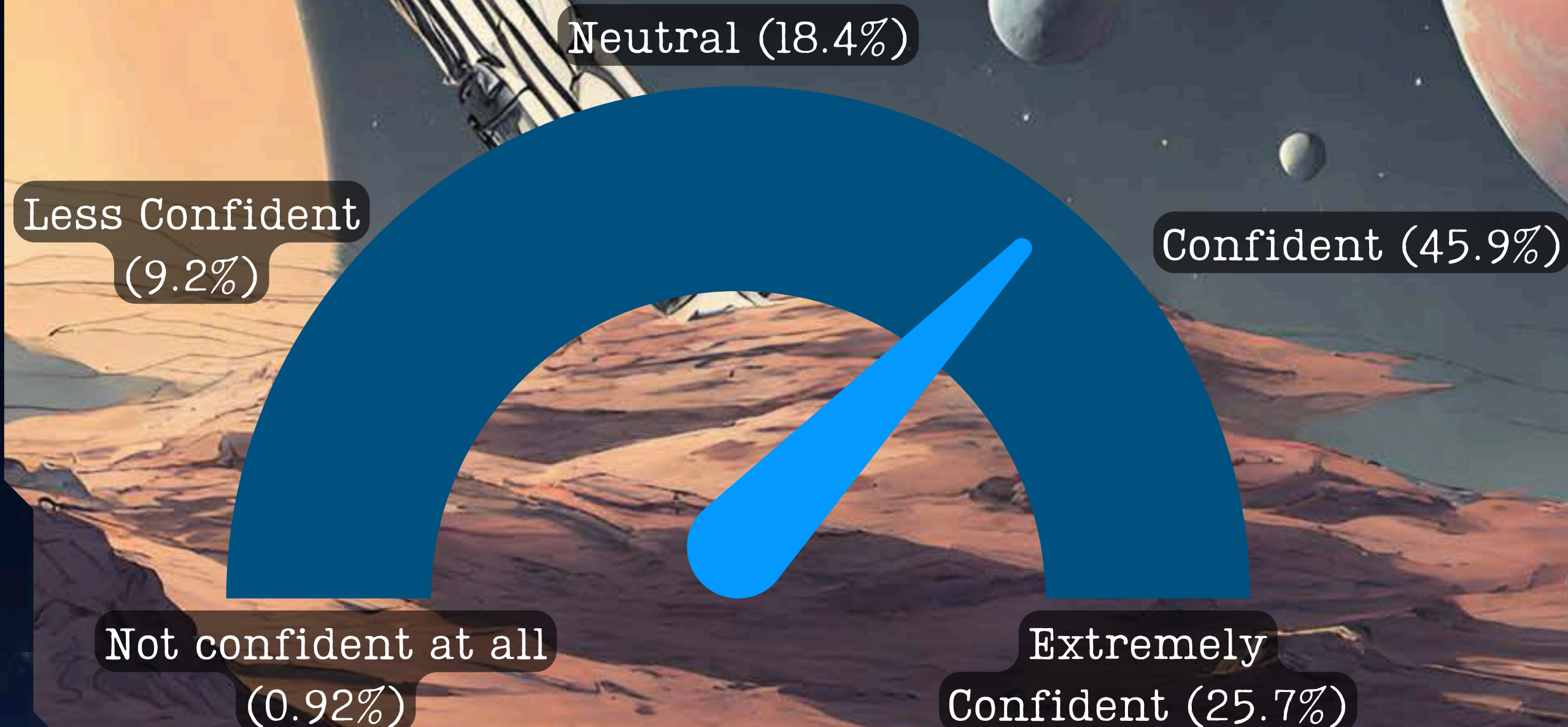
3
Custom Deals
with Properties
(12.3%)

5
Synthetic
Audiences
(7.4%)

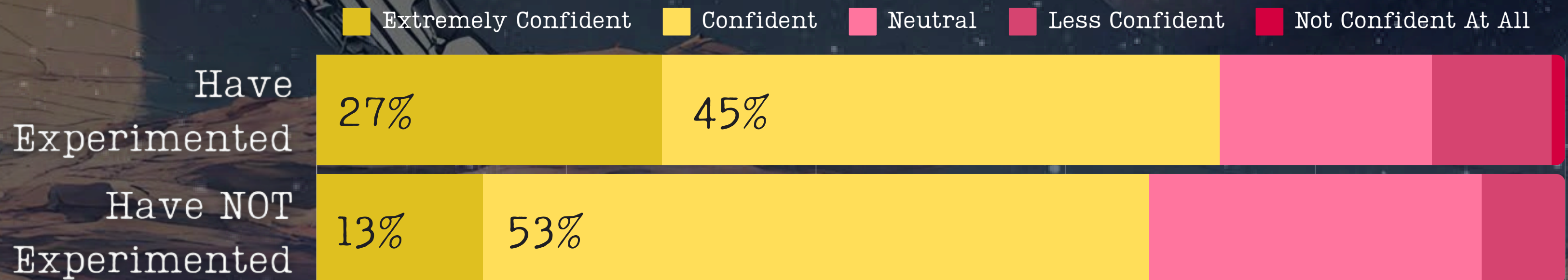
4
Topics/Interest
Based Ads
(10.8%)

6 - Branded Content (2.5%)
7 - Influencer Advertising (5.4%)
8 - Others (2%)

71.6% of the community is confident in reaching an addressable audience beyond Q4 2024



Of those who have experimented alternative means to connect to an audience have reported high levels of confidence (72.3%) in their continued ability to reach their target audience.



Surprisingly, even among the minority who did not experiment with alternative methods, two-thirds (66.7%) still reported confidence



Addressable Reach without Compromise

This session aimed to address the issue of reaching audiences at scale while maintaining signals with our consumers. In a panel led by [Sonia Carreno](#) (IAB Canada), the panelists which included [Ben Wise](#) (Google Canada), [Andrew Krausz](#) (Scotiabank) and [Claire Plaxton](#) (Rogers Sports & Media) challenged the notion that privacy and effective targeting are mutually exclusive.

Understanding the customer is key

Even with limited data available, the community stressed the importance of understanding the customer. This means going beyond basic demographics and using contextual information to deliver relevant ads.

"As we look forward, we think that context will continue to be very important, but it has to be working in hand in hand with what we know about our customer"

Heard from the community



Balancing Relevance, Personalization, and Scale

While personalization is a powerful tool, it needs to be balanced with the need for scale. Contextual targeting offers a solution, but additional signals might be needed to differentiate between potential and actual buyers. AI-powered creative tools can also help reduce the cost associated with personalized ad variations.

The panel also emphasized an urgent need for new targeting and measurement models that prioritize privacy concerns.



New Solutions will rise, but Collaboration within the industry is critical

The future of advertising likely involves a combination of solutions. Data partnerships can be valuable for brands without a strong data infrastructure, while clean rooms offer a way to collaborate on data analysis while protecting privacy. Standardized identifiers that don't reveal personal information are another potential solution.

Strong partnerships and open communication between agencies, brands, and media vendors are the foundation for innovation, necessary for success.



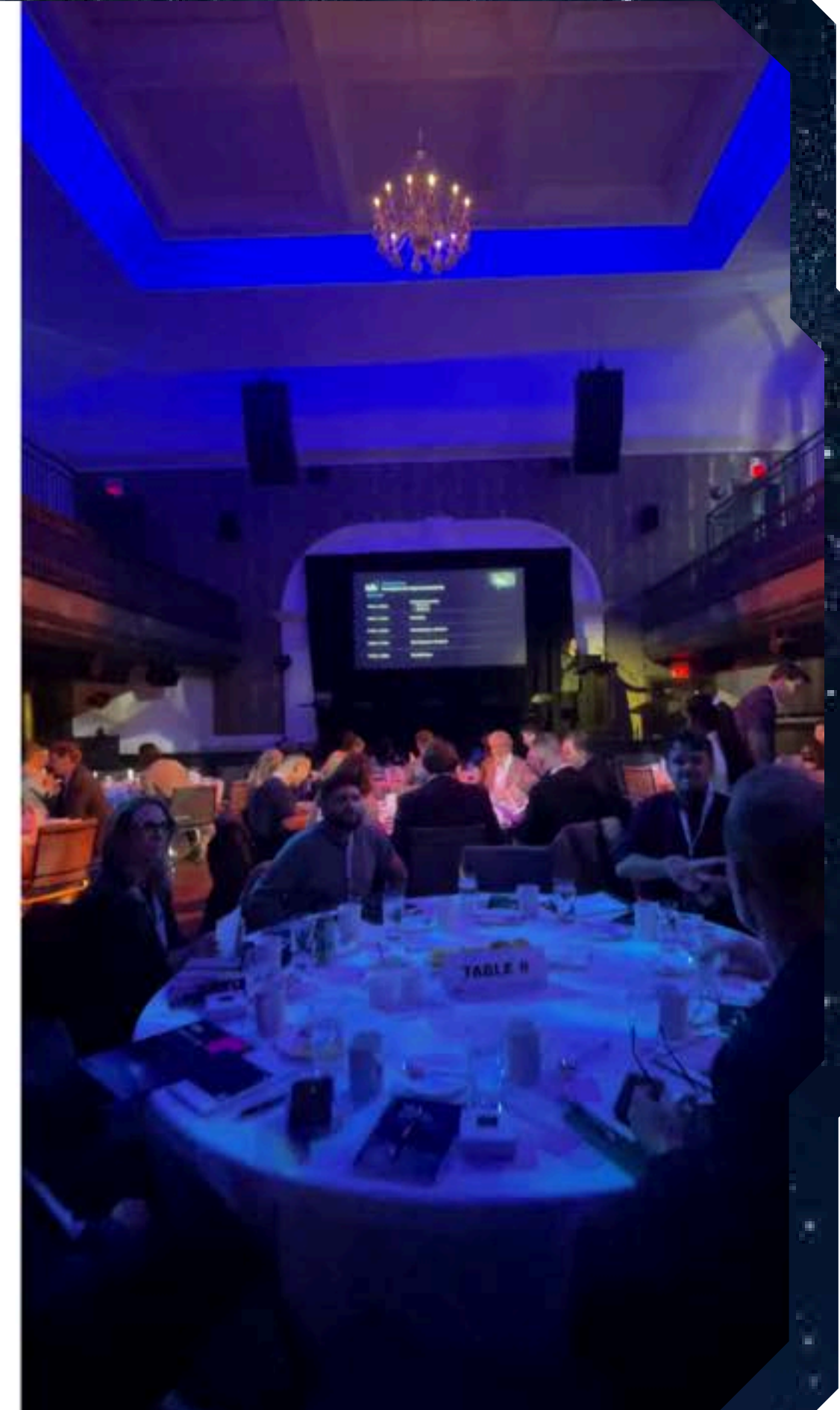
Building Trust and Transparency

the community emphasized the importance of building trust with consumers when collecting data.

Transparency and a clear value exchange are crucial for encouraging users to share their information. First-party data, collected with user consent, is seen as the most reliable source.

"Consumers are more likely to share data if there's a clear value exchange."

Heard from the community



Notes from The President

We launched Enterprise 2024 with the understanding that if the digital advertising industry knew what the industry knows, we could increase our productivity and profitability in orders of magnitude. With rapid legislative and technical developments impacting our sector, it is imperative to move at the speed of change as we create new frameworks, standards and adaptive upskilling programs. Our Enterprise leadership event did not disappoint. It was a day filled with sharing insights and forming the blue prints towards developing solutions.

Through innovative and collaborative formats like Enterprise, we are able to foster open communication and group problem-solving opportunities to help develop a sustainable and prosperous digital media industry in Canada. We look forward to our next Enterprise event that will again bring together a diverse group of stakeholders in a fast-paced, experimental environment, to shape the future of our industry with our collective powerful digital leadership.

Sonia Carreno, President, IAB Canada



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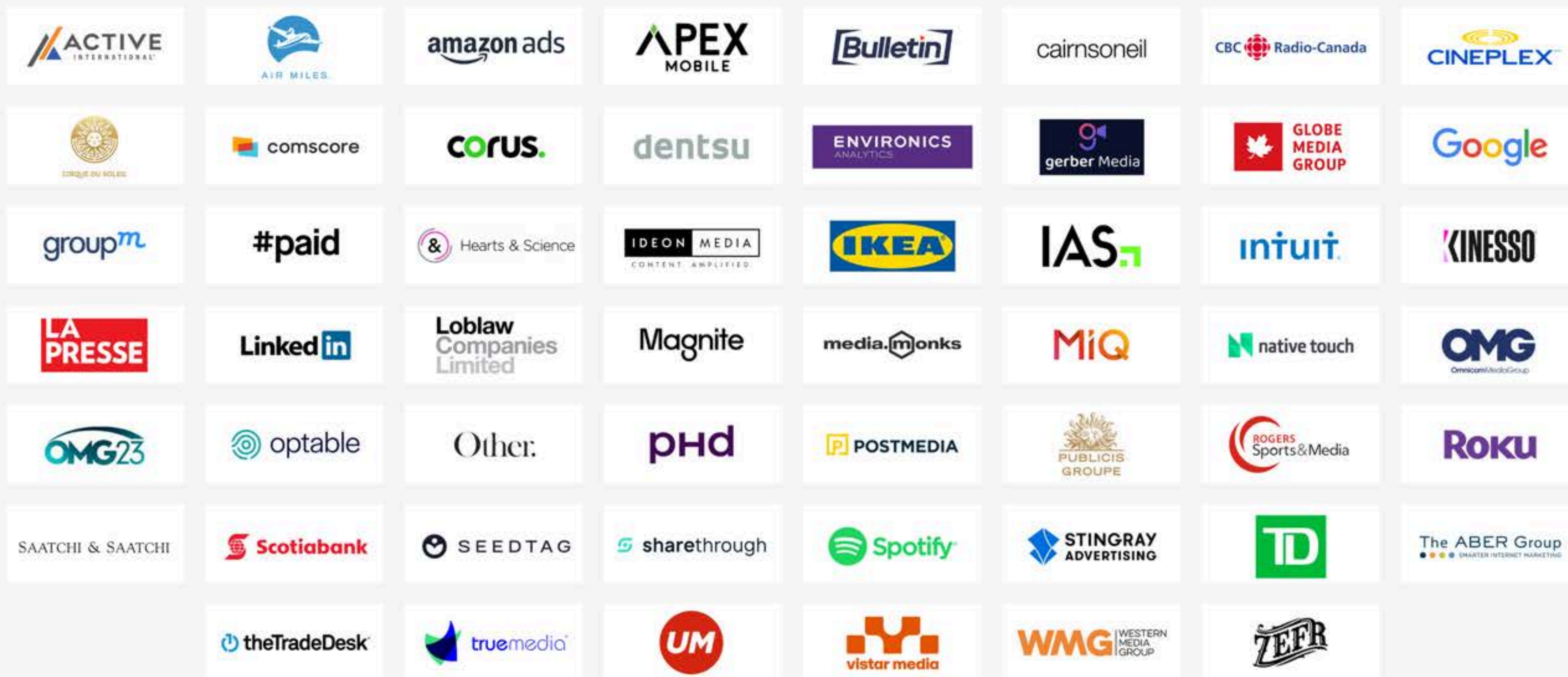


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Thank you to our Enterprise Community





Established in 1997, The Interactive Advertising Bureau of Canada (IAB Canada) is the national voice and thought leader of the Canadian interactive marketing and advertising industry. We are the only trade association exclusively dedicated to the development and promotion of the digital marketing and advertising sector in Canada.

As a not-for-profit association, IAB Canada represents over 250 of Canada's most respected advertisers, ad agencies, media companies, service providers, educational institutions and government associations. Our members represent a diverse range of stakeholders in the rapidly growing Canadian digital marketing and advertising sector, and include numerous small and medium sized enterprises.

Get Involved

If you would like to get involved with IAB Canada contact us at our emails below:



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