

Investment Market

Digital Ad Revenue

iab australia

grow sustainable
and diverse
investment in digital
advertising in
australia

what?

data & privacy

measurement

transparency & efficiency

sustainability

prepare for the future

how?

promotion & advocacy

research & insights

events & community

education & mentoring

standards & best practice

councils

iab.
australia
executive
technology

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audio advertising

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advertising
effectiveness

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standards &
guidelines

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australia
audience
measurement

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data advertising

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video advertising

iab.
australia
dooh advertising

iab.
australia
retail media

working groups

affiliate marketing | search | AI

Total internet advertising
market 2024

\$16.4 billion

Internet advertising market growth
2024 vs 2023

+11.1%

IAB Australia
Internet Advertising
Revenue Report

For the calendar year and quarter ended 31
December 2024

pwc

iab.
australia

annual adex by category

(\$ billions)

perth market update

CAGR
(2018 – 2024)

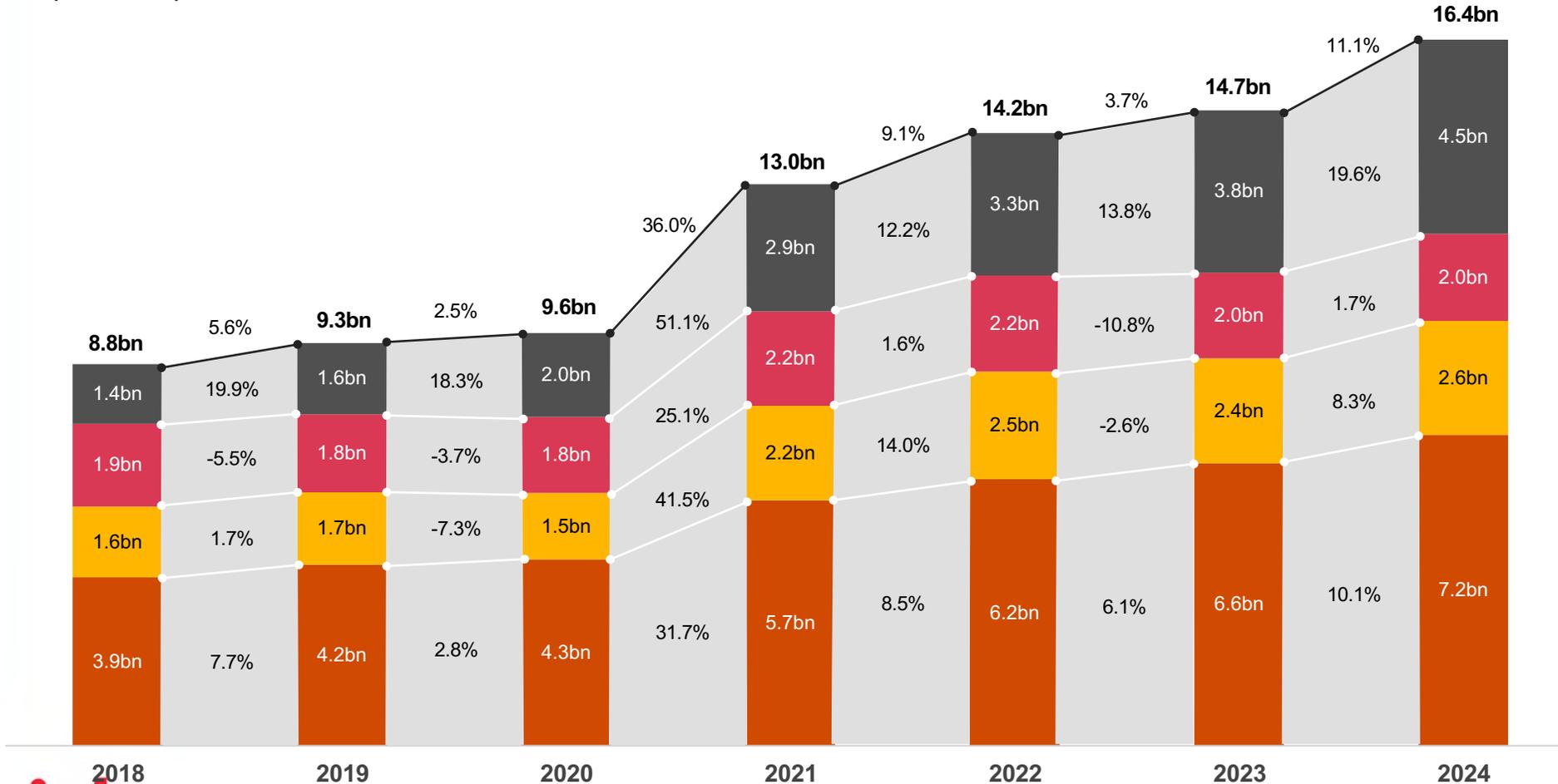
10.8%
Total Market

21.8%
Video

0.8%
Display

8.2%
Classifieds

10.8%
Search



Search



Classified



Display*

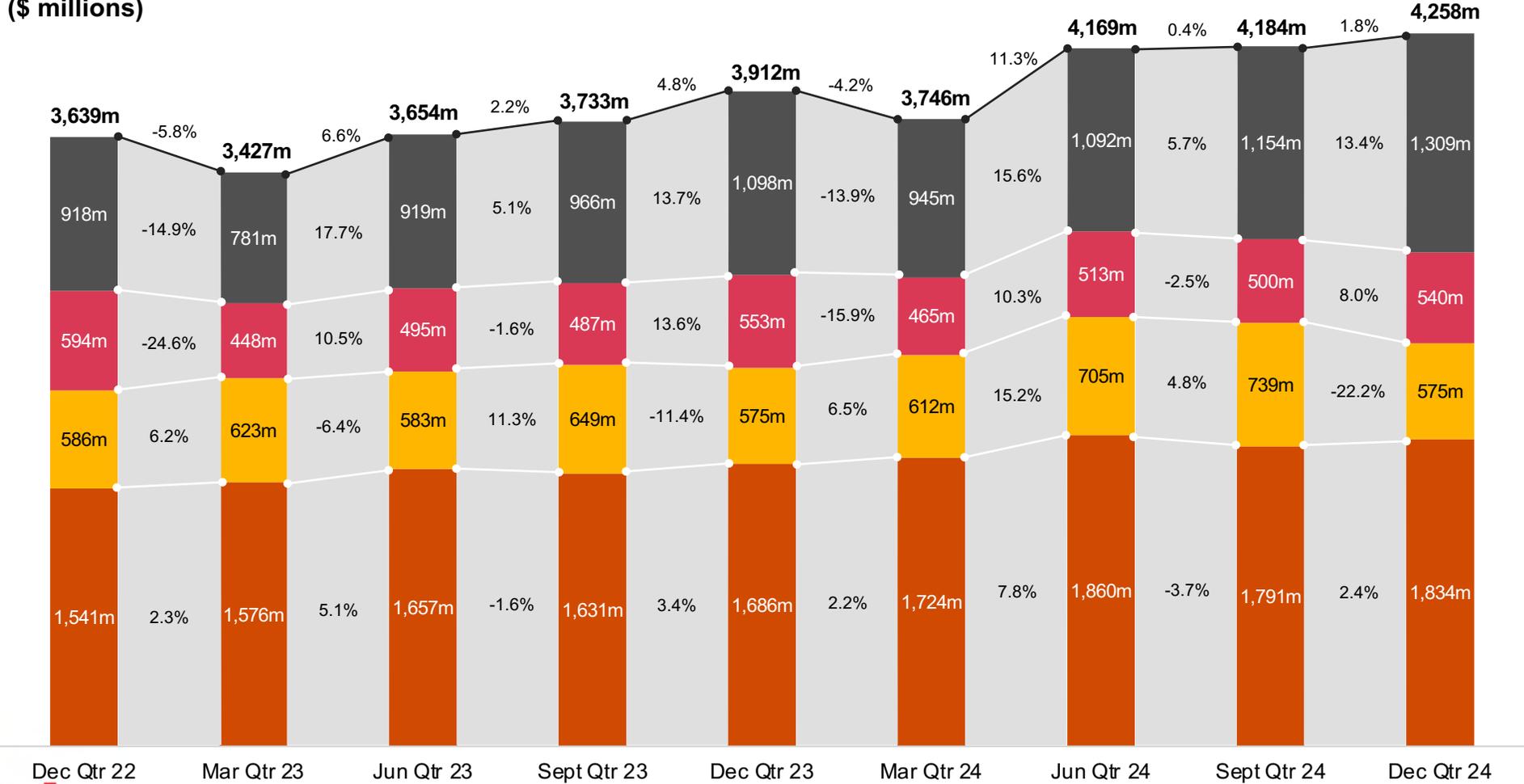


Video

quarterly adex by category

perth market update

(\$ millions)



Search



Classified



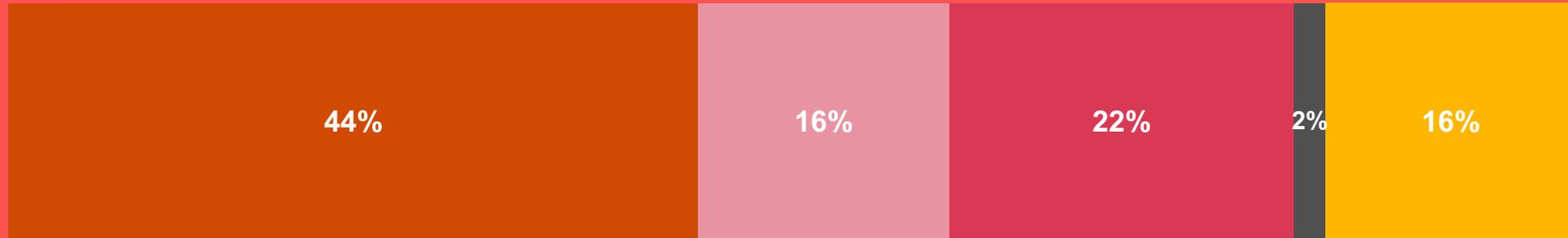
Display*



Video

adex share by category

category share by calendar year



Search



Social Display & Video*



Non-Social Display & Video^



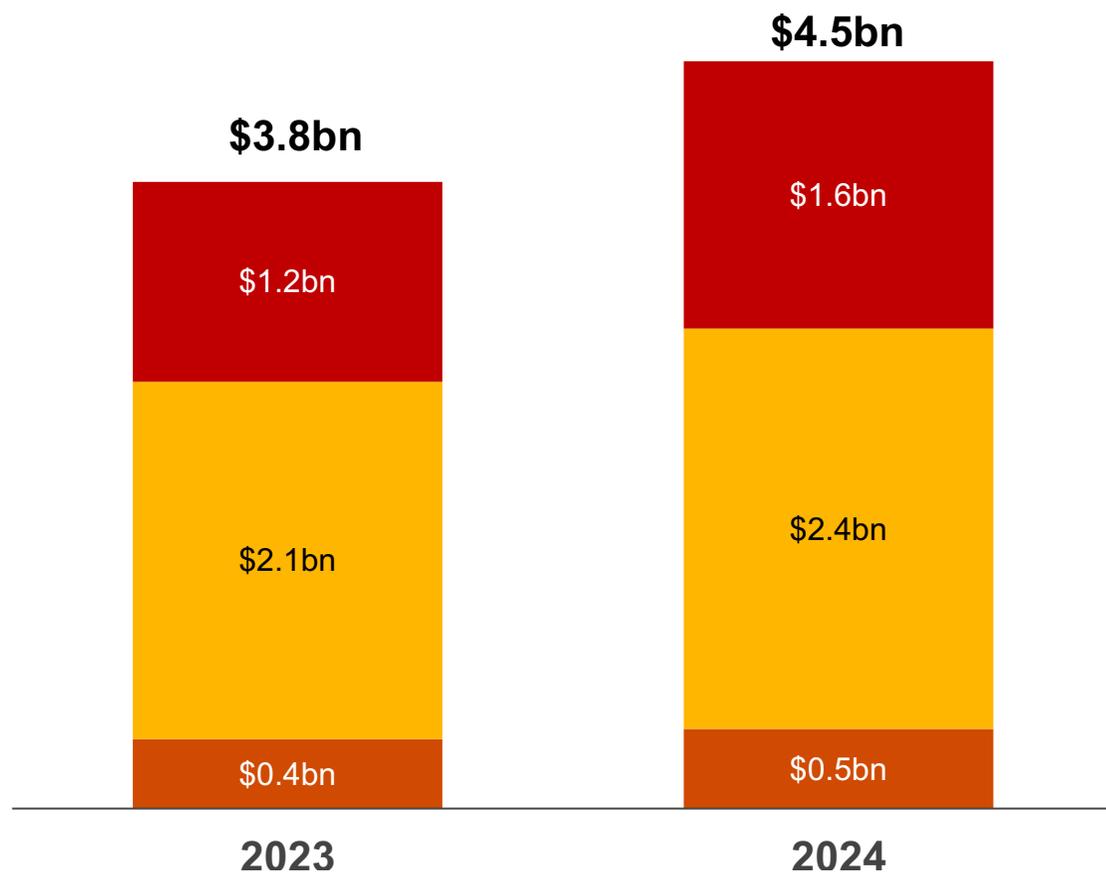
Audio



Classified

	Search	Social Display & Video	Non-Social Display & Video	Audio	Classified
2023	44.5%	15.1%	22.1%	1.8%	16.5%
2024	44.1%	16.1%	21.8%	1.9%	16.1%
Movement in share	-0.4	+1.0	-0.3	+0.1	-0.4

video investment



Total Video



+19.6% on 2023

Social Video^



+33.2% on 2023

Other Video**



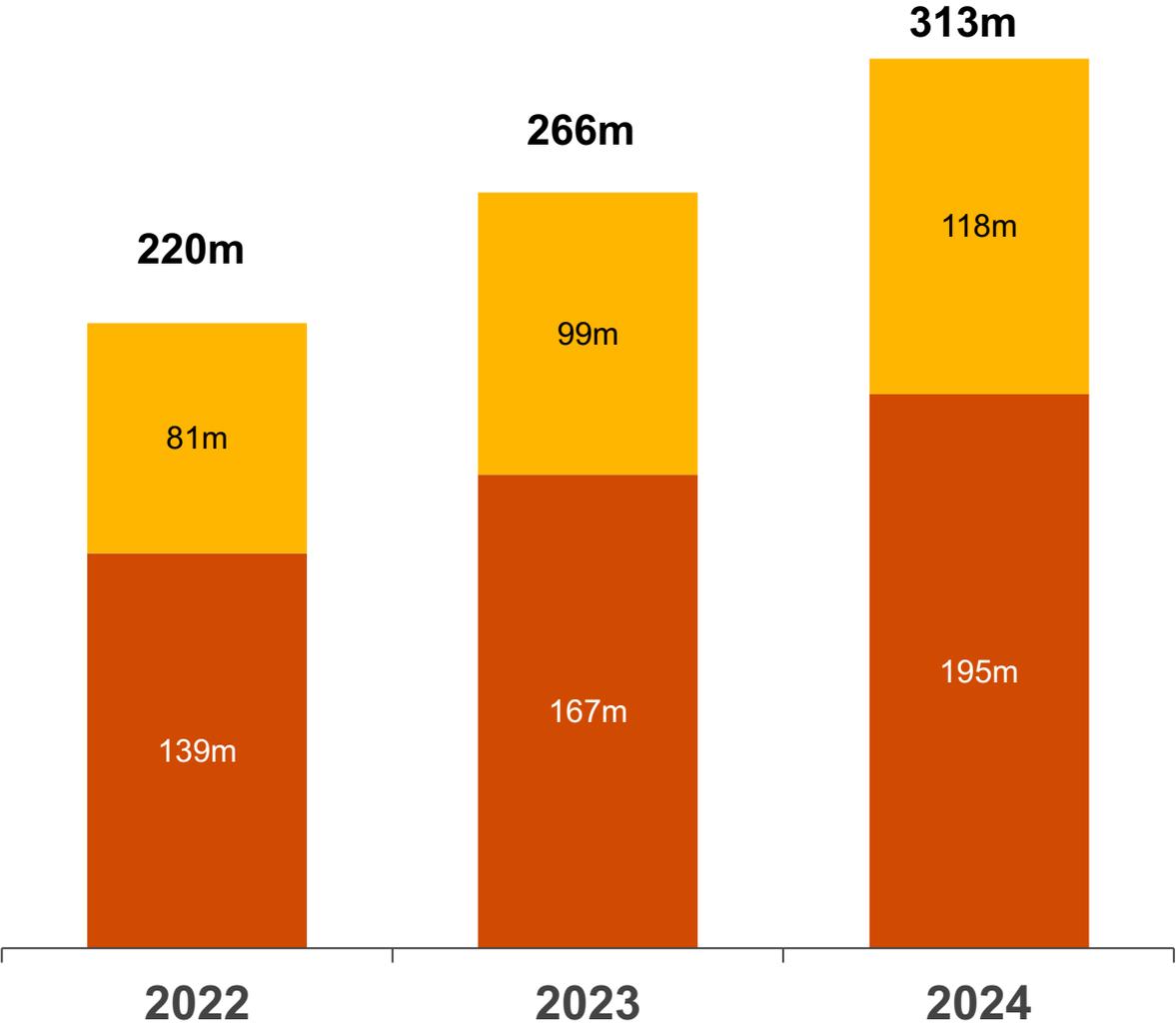
+12.9 on 2023

BVOD Video*



+14.4% on 2023

audio investment



Total Audio



+17.8% on 2023

Podcast



+19.1% on 2023

Streaming

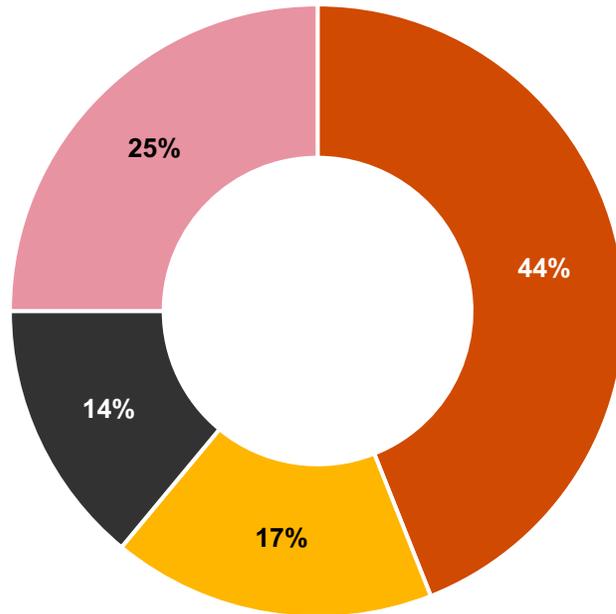


+16.9% on 2023

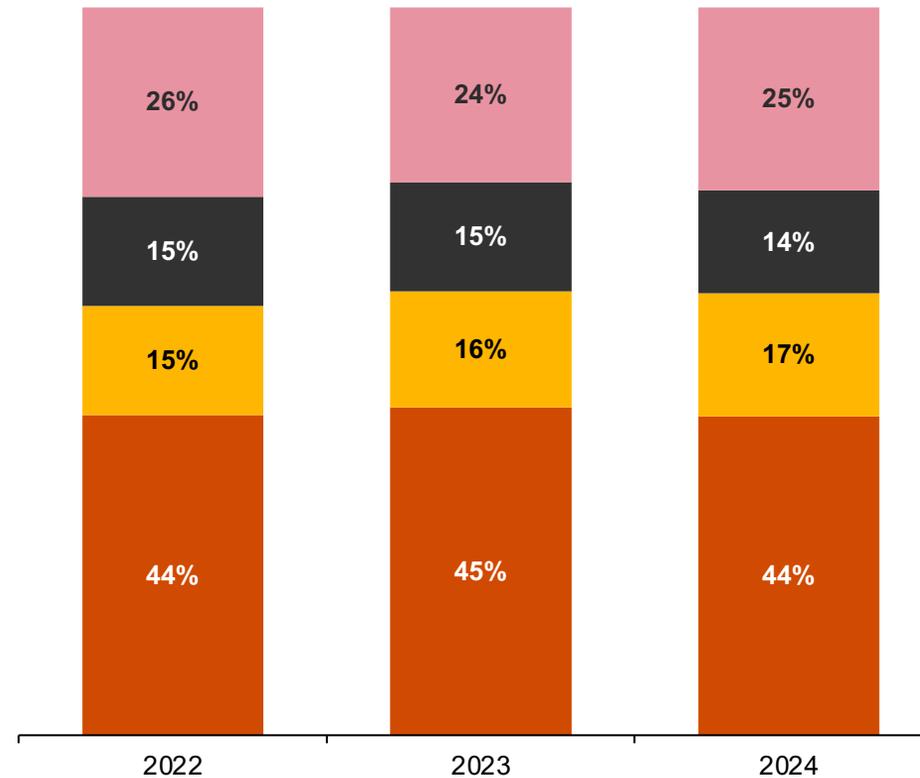
buying methods – publisher inventory

perth market
update

General display advertising for content publishers' inventory
by buying method, calendar year 2024



General display advertising for content publishers' inventory
by buying method, by calendar year



top 5 industry categories



Retail

17.1%
2024 Share

17.8%
2023 Share



Automotive

14.8%
2024 Share

14.4%
2023 Share



Finance

8.0%
2024 Share

8.6%
2023 Share



Entertainment

6.8%
2024 Share

6.2%
2023 Share



FMCG

6.1%
2024 Share

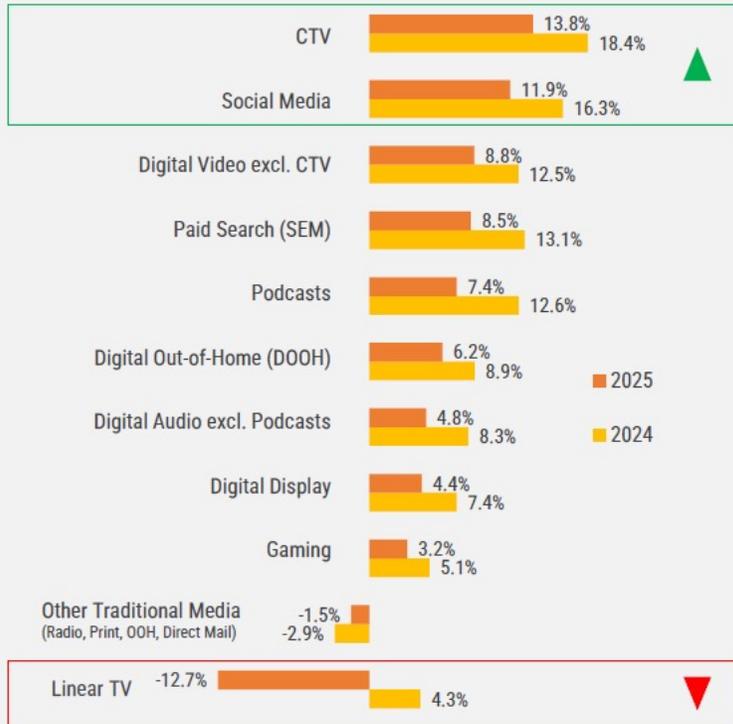
5.6%
2023 Share



US market outlook

perth market update

PROJECTED % CHANGE AD SPEND YoY, BY CHANNEL



PROJECTED % CHANGE RETAIL MEDIA AD SPEND YoY

(Primarily CPG/Beauty)

+25.1%

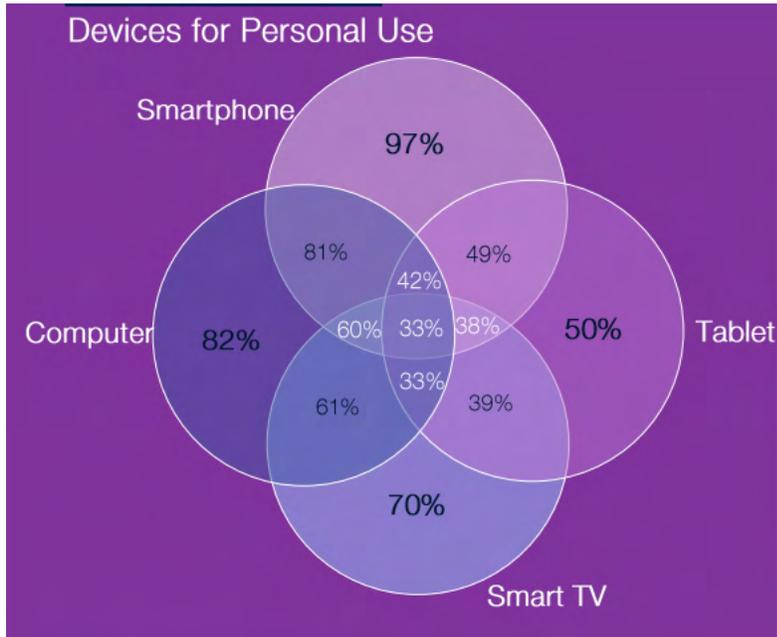
2024 (vs. 2023)

+15.6%

2025 (vs. 2024)

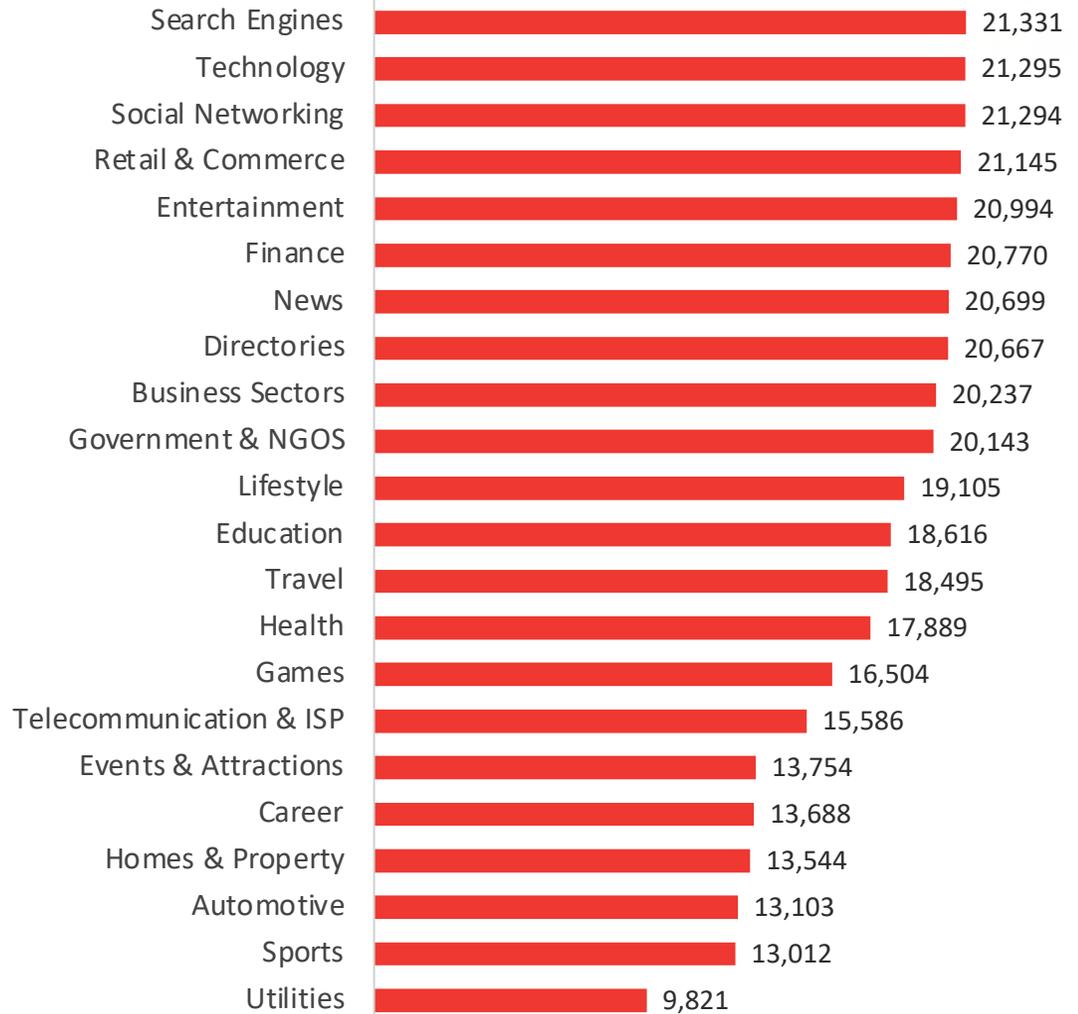
measurement – audiences & outcomes

digital media access

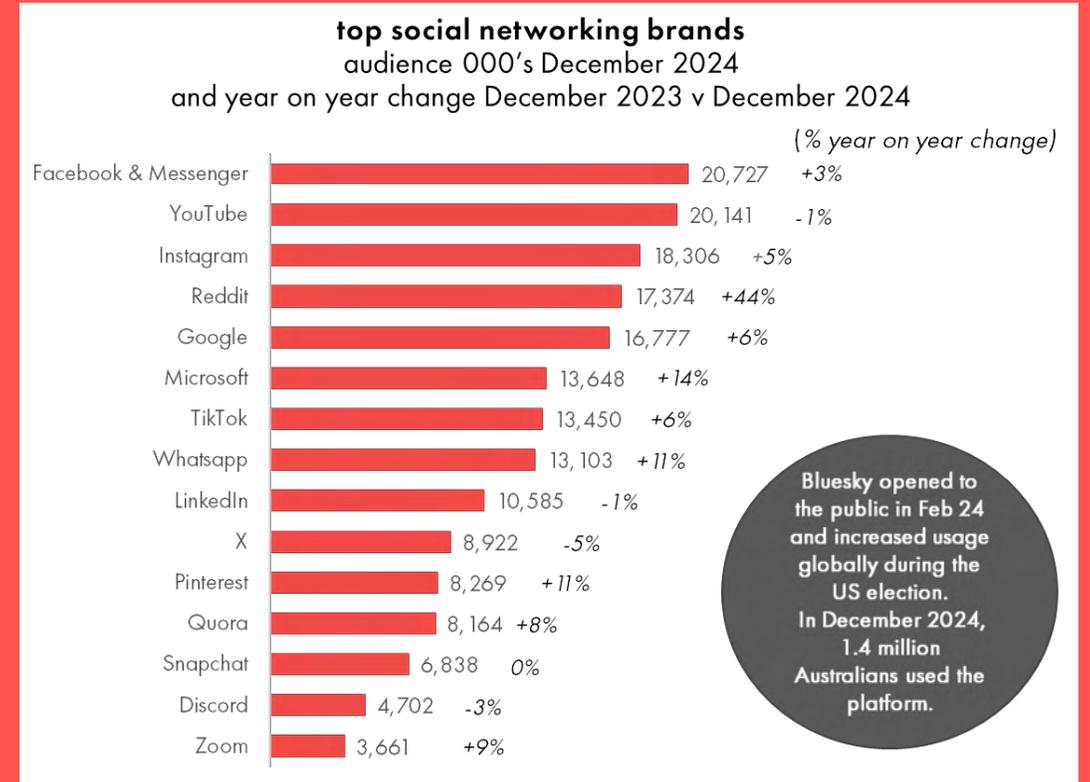
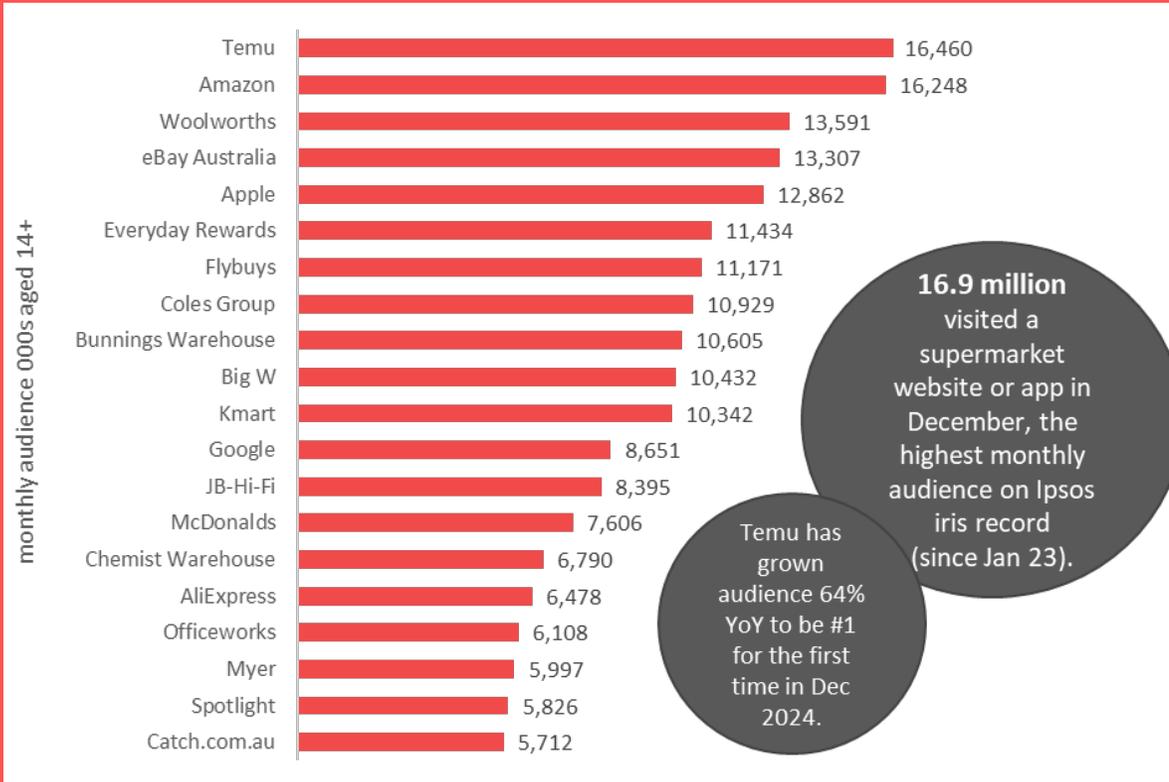


perth market update

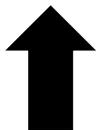
monthly audience (000)s aged 14+



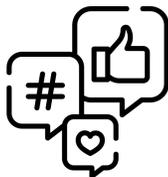
digital media trends



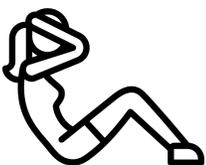
digital media trends – increase in time



Price comparison
- up 65% yoy



Social media
- up 31% yoy



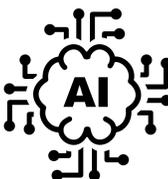
Fitness/health -
up 44% yoy



Travel
- up 16% yoy



Supermarket
- up 33% yoy



AI
- up % yoy

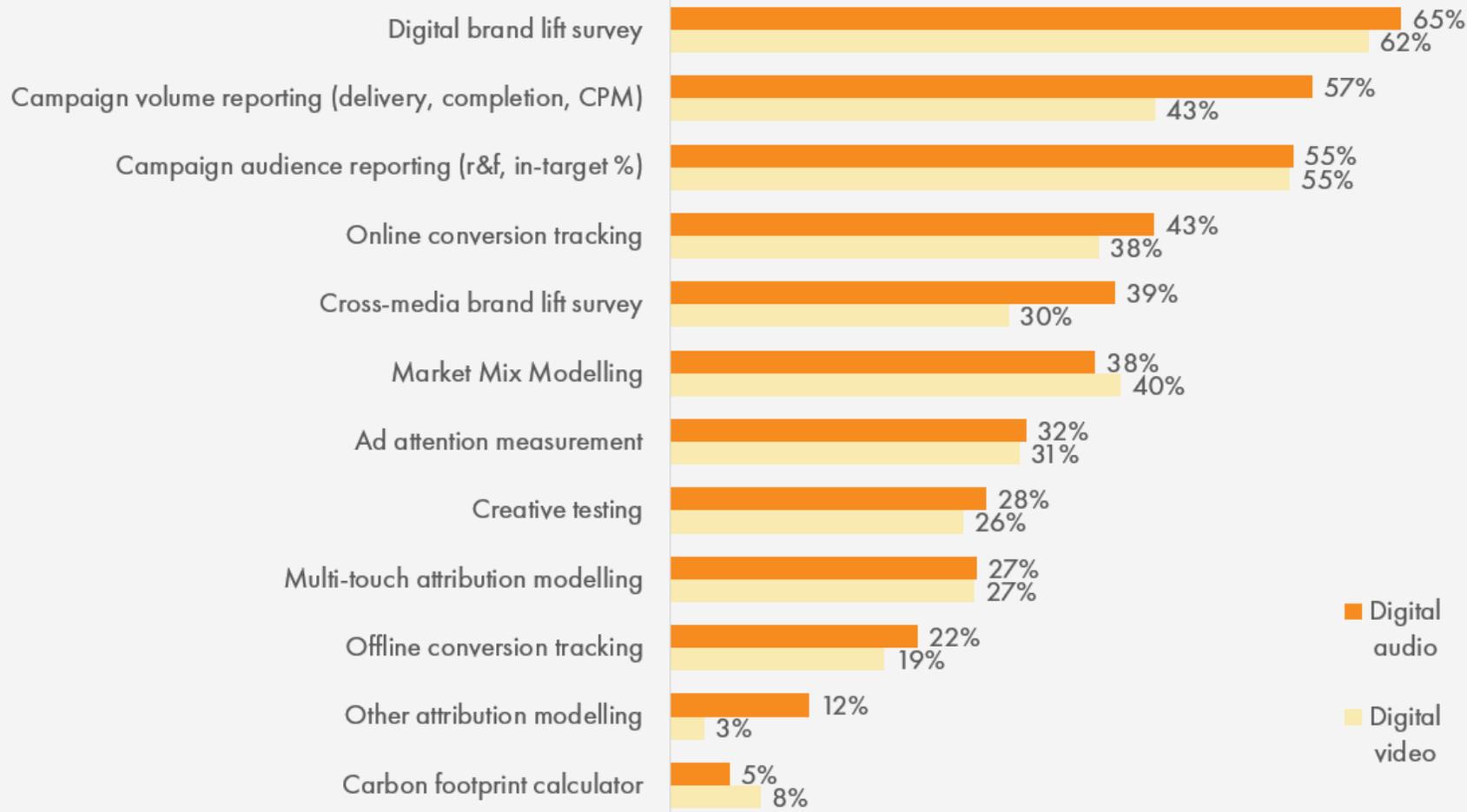
WA habits



**perth market
update**

ad effectiveness measurement

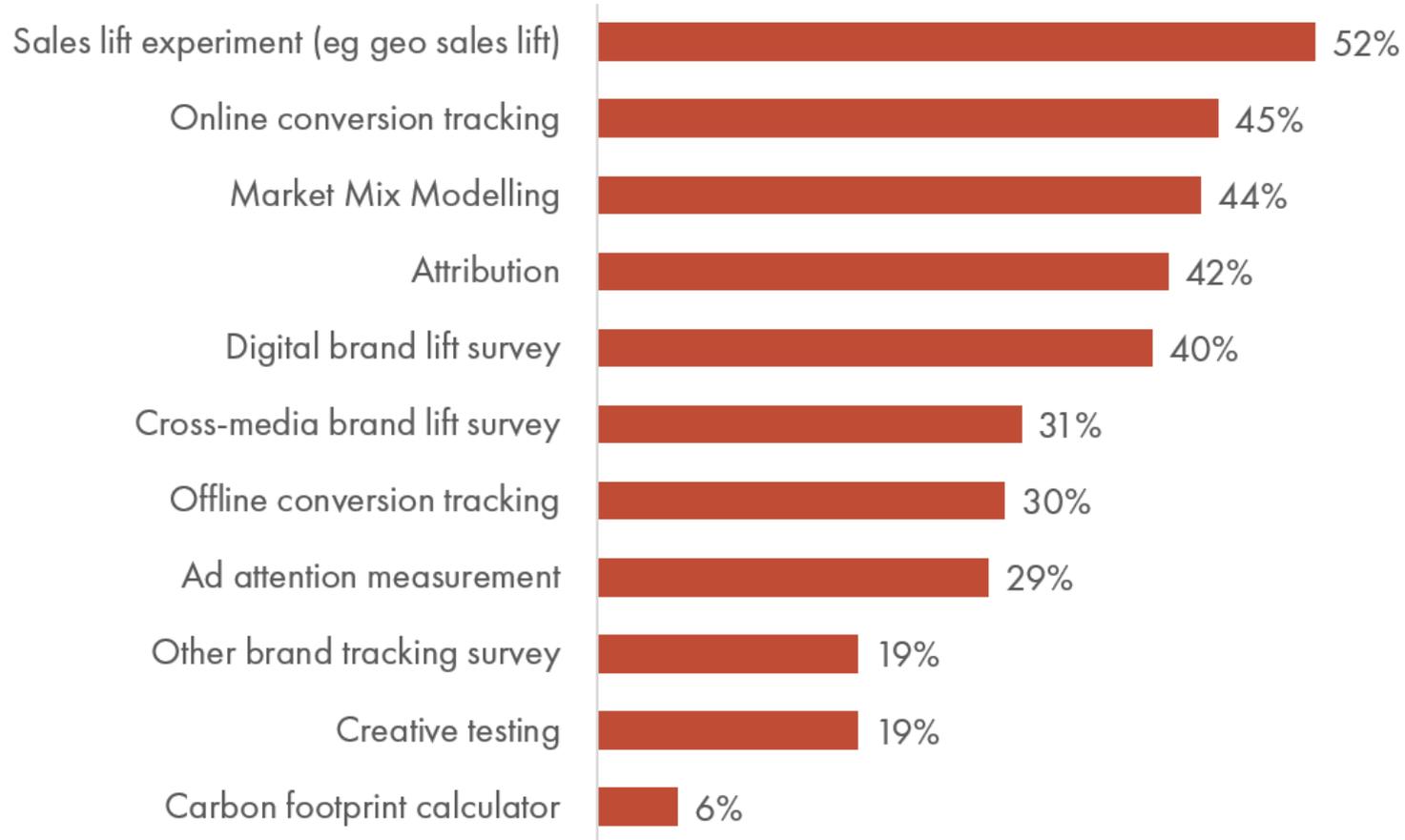
important measurement tools for assessing the effectiveness of digital video and digital audio advertising



Digital audio
Digital video

ad effectiveness measurement

retail media - measurement tools important to assess effectiveness



innovation and developments in programmatic dooh

perth market
update

brad palmer

national programmatic director,
jcdcaux australia



JCDecaux

JCDecaux PROGRAMMATIC

IAB Australia Perth Market Update

A trip down memory lane...



WA.GOV.AU

Activated within hours in response to the WA Government's 3-day snap lockdown announced from 12PM on 27th June for Perth and Peel areas. Utilising the flexibility of programmatic Out-of-Home to inform people within the community of the rapidly changing restrictions.

Category **Government**

DSP **Vistar Media**

Timing **June – July 2021**

Markets **PER**

Formats **Large Format, Street Furniture**



Agenda

- 1 The global lens from JCDecaux
- 2 Local growth blockers and accelerators
- 3 The Definitive Guide to Programmatic Out-of-Home Success
- 4 Key takeaways for the Perth market
- 5 Q&A

JCDecaux PROGRAMMATIC

JCDecaux

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JCDecaux PROGRAMMATIC

JCDecaux

The global Out-of-Home tech space is a very active acquisition space the moment



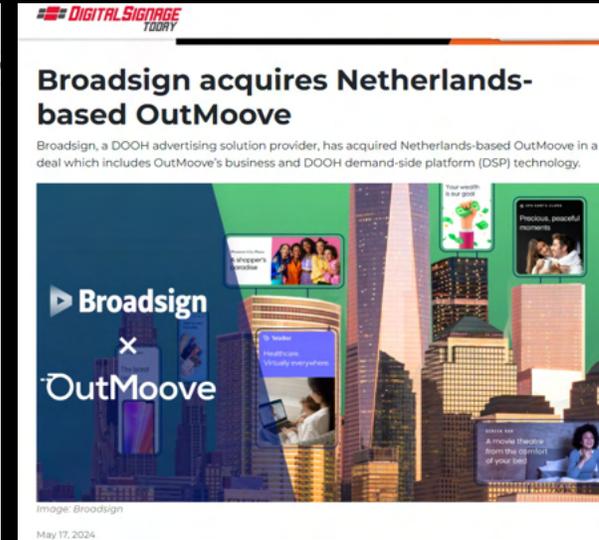
July 2022

JCDecaux buys Displayce stake



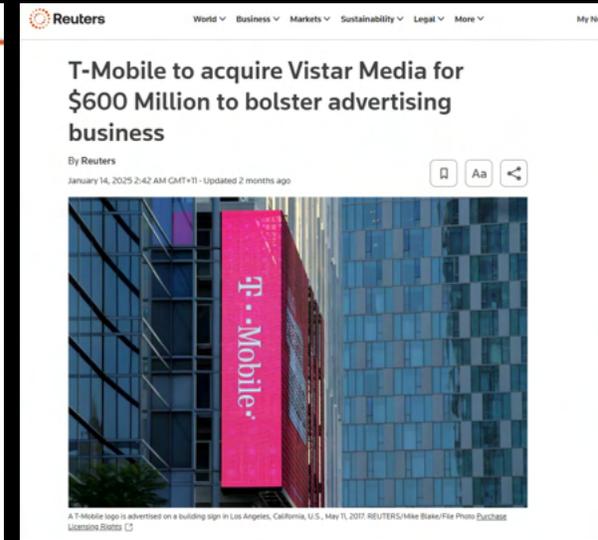
December 2023

Perion acquires Hivestack



Mid 2024

Broadsign acquires OutMoove



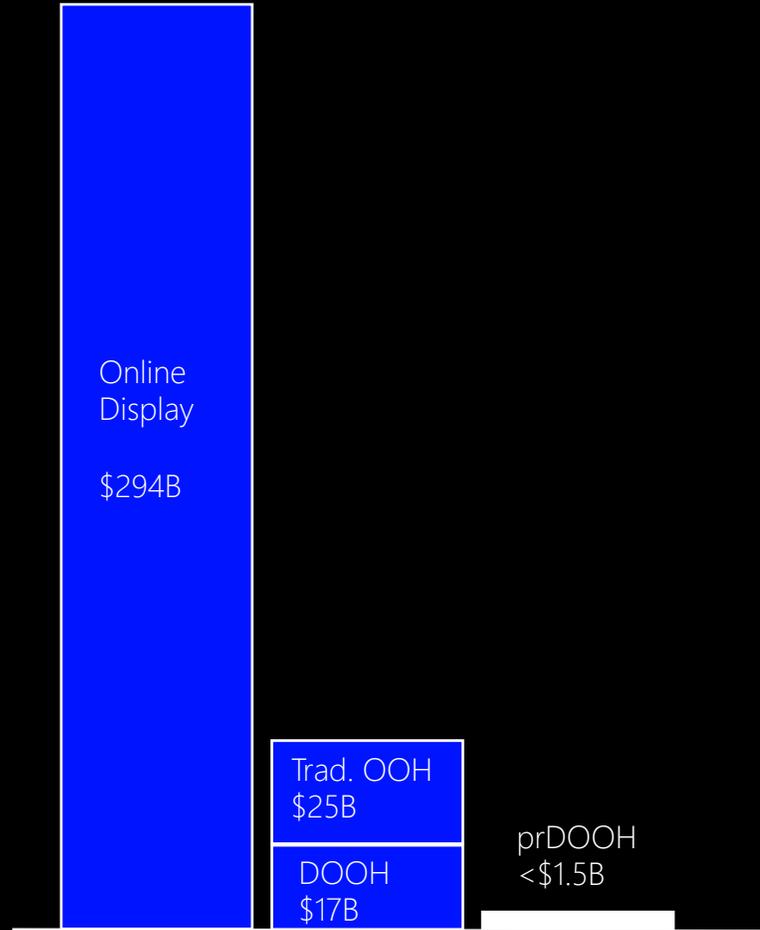
January 2025

T-Mobile acquires Vistar & Blis

The omnichannel opportunity for prDOOH is obvious

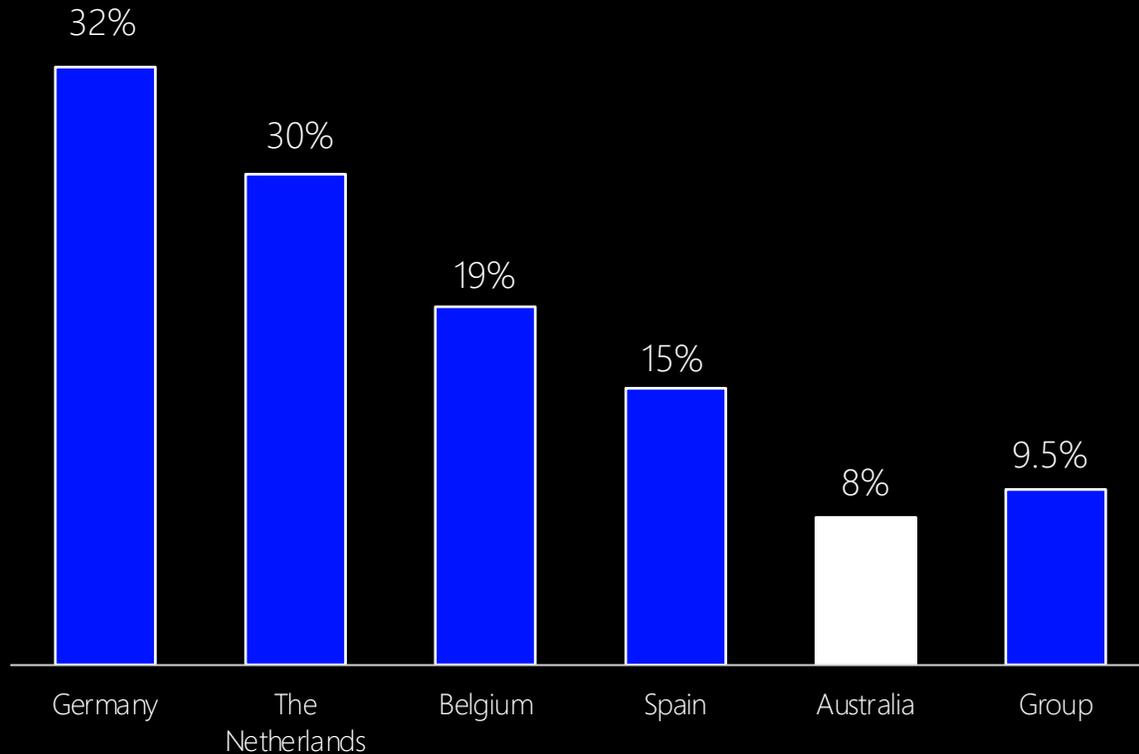
Online display advertising is \$300B market across the globe

85%
is traded via
programmatic



Source: Zenith Optimedia June 2024, advertising market for 2024

Why are some markets within JCDecaux already realising programmatic potential?



Share of programmatic in digital revenue in FY 2024 – JCDecaux Group

Smaller portfolios

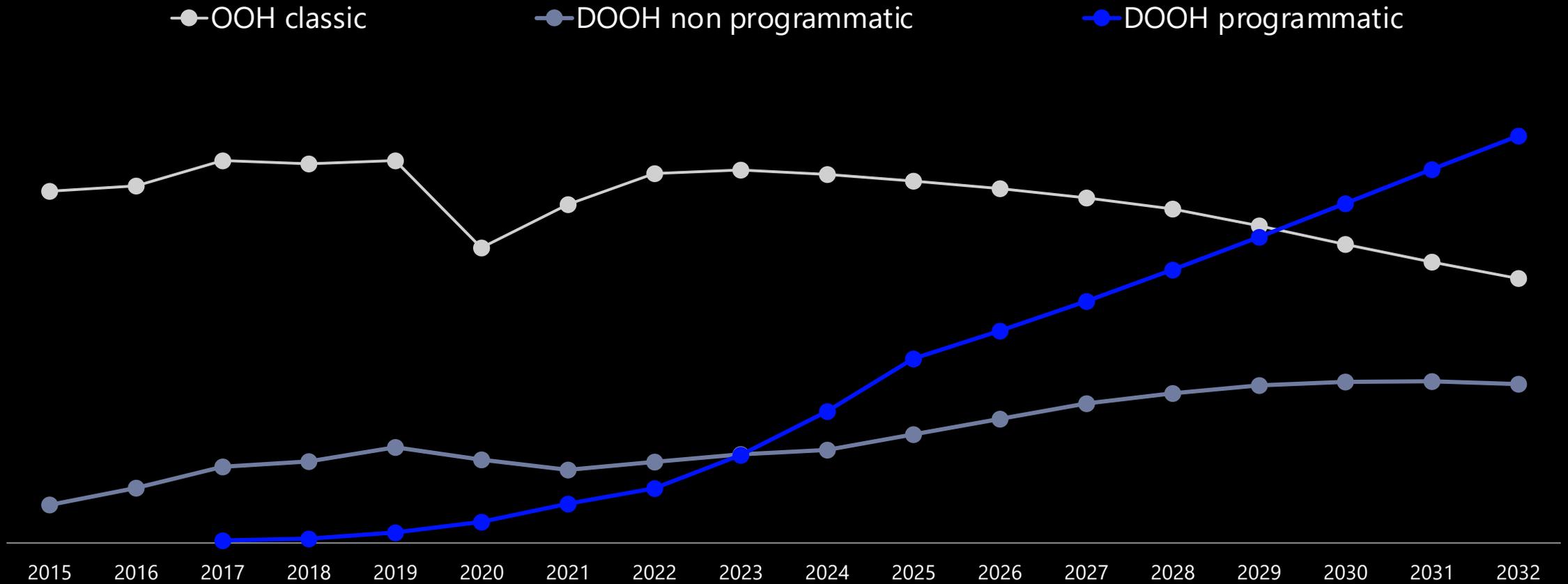
Media owner alignment

Agency maturity & specialism

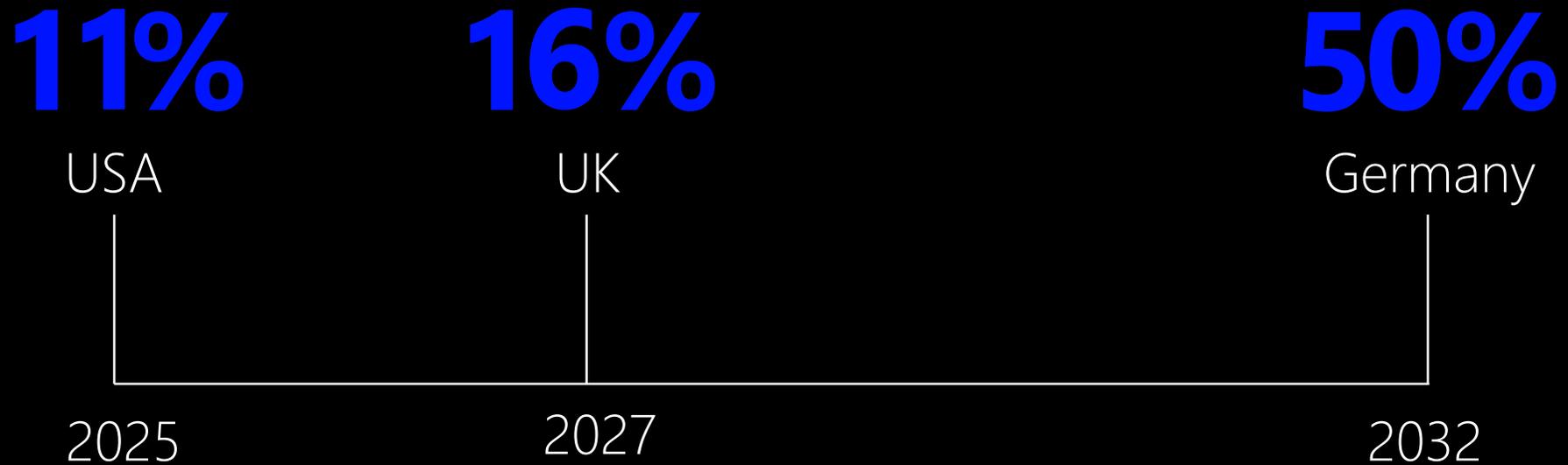
Preference towards PG

DCO advancements

2024 was the year where programmatic overtook traditional digital Out-of-Home in Germany



And the share of total Out-of-Home revenues to programmatic will be significant in years to come



Based on similar UK market economics, Australia should be a \$200M market by 2027

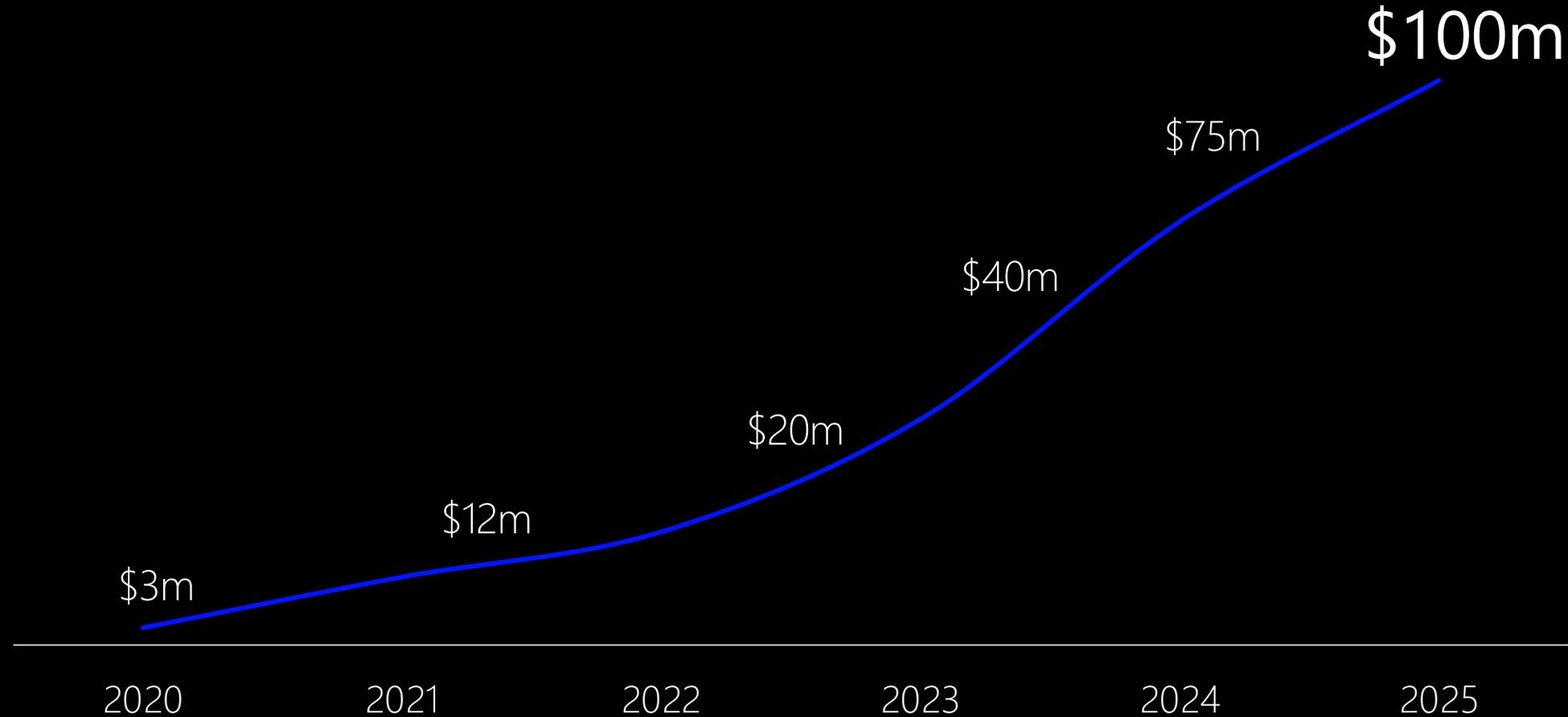
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JCDecaux PROGRAMMATIC

JCDecaux

Despite recent impressive growth, prDOOH revenue in Australia is still at **only 5%** of total Out-of-Home revenue



What is **blocking** growth?

GROWTH BLOCKERS

BLOCKER 1

Commoditisation,
proliferation and education
of programmatic supply
available

BLOCKER 2

Agency and buy-side
resourcing challenges
reducing time "on the
tools"

BLOCKER 3

Lack of convergence of
media owner sales team
at a time where agencies
want simplicity

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want simplicity

 JCDecaux	Large Format	Small Format	Airport	Rail
JCDecaux	●	●	●	●
OOH! MEDIA	●	●	●	●
QMS	●	●	●	/
VMO	/	/	/	/
CARTOLOGY	/	/	/	/
MOTIO	/	/	/	/
TMS	/	/	/	/
SCENTRE GROUP	/	/	/	/
GOA	●	/	/	/
LENDLEASE	/	/	/	/
CIVIC OUTDOOR	●	/	/	/
TONIC MEDIA NETWORK	/	/	/	/
EI MEDIA	●	/	/	/
VICINITY	/	/	/	/
JOLT	/	/	/	/
STOCKLAND	/	/	/	/
BIG OUTDOOR	●	/	/	/
NBS	/	/	/	/

There is now more
programmaticsupply
than ever

	Large Format	Small Format	Airport	Rail	Gyms	Offices	Retail	Dining	Petrol/ EV	Convenience	Medical
JCDecaux	●	●	●	●	/	/	/	/	/	/	/
OOH! MEDIA	●	●	●	●	/	●	●	/	/	/	/
QMS	●	●	●	/	/	/	/	/	●	/	/
VMO	/	/	/	/	●	●	●	/	●	/	/
CARTOLOGY	/	/	/	/	/	/	●	/	/	●	/
MOTIO	/	/	/	/	●	/	/	●	/	●	●
TMS	/	/	/	/	/	/	●	/	●	/	/
SCENTRE GROUP	/	/	/	/	/	/	●	/	/	/	/
GOA	●	/	/	/	/	/	/	/	/	/	/
LENDLEASE	/	/	/	/	/	/	●	/	/	/	/
CIVIC OUTDOOR	●	/	/	/	/	/	/	/	/	/	/
TONIC MEDIA NETWORK	/	/	/	/	/	/	/	/	/	/	●
EI MEDIA	●	/	/	/	/	/	/	/	/	/	/
VICINITY	/	/	/	/	/	/	●	/	/	/	/
JOLT	/	/	/	/	/	/	/	/	●	/	/
STOCKLAND	/	/	/	/	/	/	●	/	/	/	/
BIG OUTDOOR	●	/	/	/	/	/	/	/	/	/	/
NBS	/	/	/	/	/	/	●	/	/	/	/

What can **accelerate** growth?

GROWTH ACCELERATORS

ACCELERATOR 1

The highly anticipated launch of MOVE2 and impression multiplier standardisation

ACCELERATOR 2

Deeper education of programmatic benefits, results-driven case studies and reporting capabilities

ACCELERATOR 3

Technology enhancements to ease transaction tensions and push innovation (DCO, specs, etc)

What can **accelerate** growth?

GROWTH ACCELERATORS

ACCELERATOR 1

The highly anticipated launch of MOVE2 and impression multiplier standardisation

ACCELERATOR 2

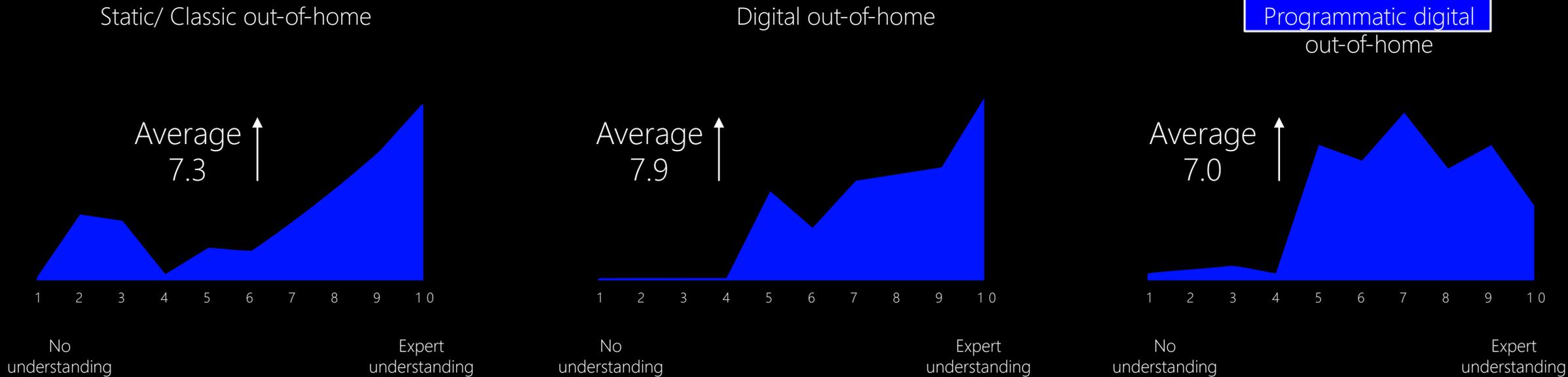
Deeper education of programmatic benefits, results-driven case studies and reporting capabilities

ACCELERATOR 3

Technology enhancements to ease transaction tensions and push innovation (DCO, specs, etc)

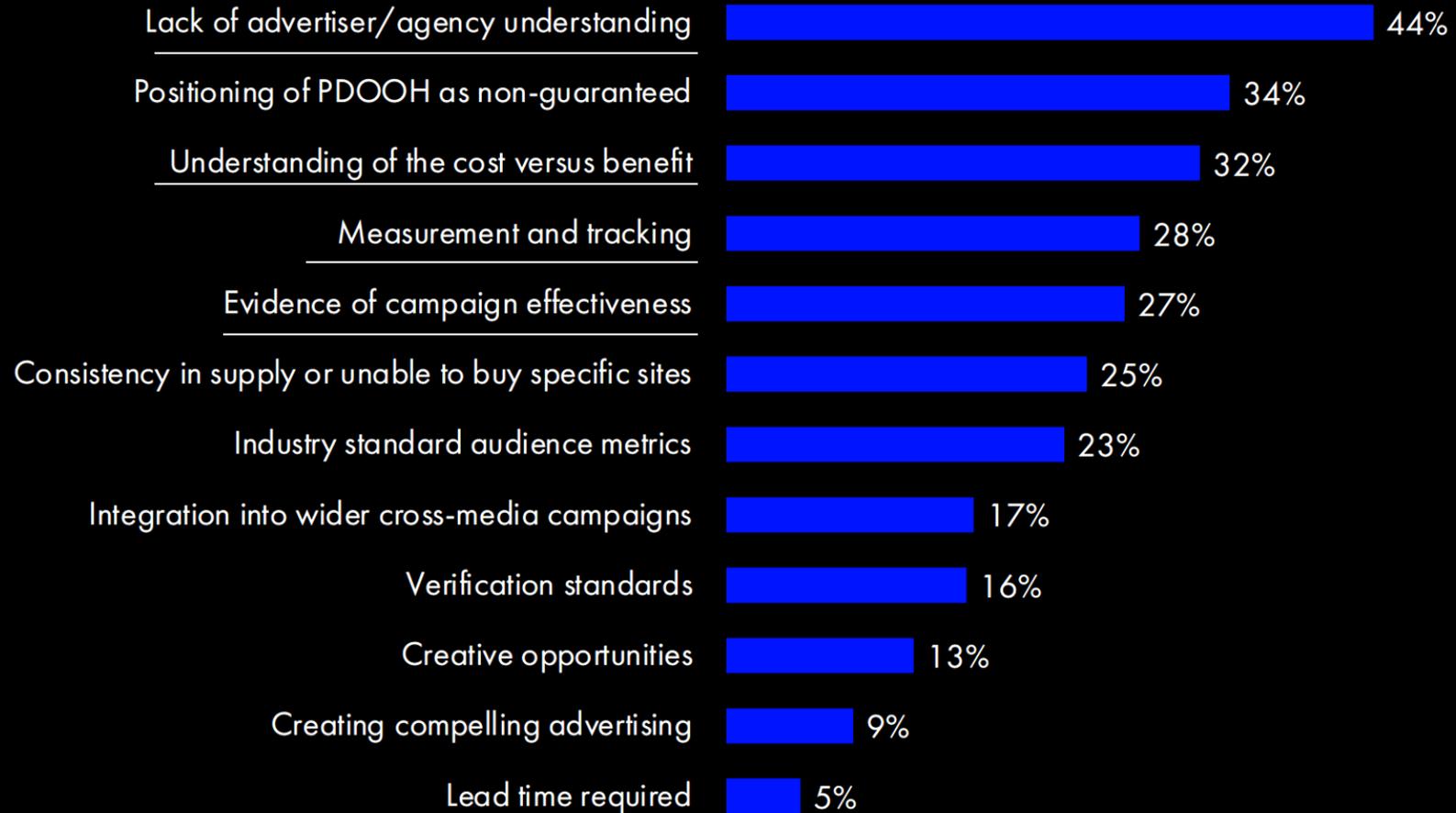
The Australian buying market continually requests further education around prDOOH to drive growth

Understanding of the forms of out-of-home advertising



Source: IAB Australia Attitudes to DOOH 2024

Top issues preventing programmatic becoming a larger proportion of digital Out-of-Home volume



The IAB DOOH Working Group continues to deliver education and information for buyers

Online education

foundations of programmatic digital out of home training

calling all brands and agencies

complete the training for your chance to win one of 100 x \$50 gift vouchers!*

thanks to

BroadSign HIVESTACK JCDecaux ooh! QMS theTradeDesk

TONIC MEDIA NETWORK VMO veridooh VIOOH vistar media yahoo!

*see www.iabaustralia.com.au/news/pdoohtainingcourse for conditions of entry

Buyer surveys

attitudes to programmatic DOOH

iab. australia 2024

DSP Reporting Matrix

iab. australia dooh buyer's guide dsp reporting matrix

This matrix outlines the level of reporting available within the DSP or via third parties as part of the DSP service.

Legend:

- Yes, standard within platform
- On request from DSP
- Not available
- Click for more information

	dsp	the trade desk	livestack	yahoo	viator	bits	broadsign
delivery	plays	Yes	Yes	Yes	Yes	Yes	Yes
	impressions	Yes	Yes	Yes	Yes	Yes	Yes
	impression multiplier	Yes	On request	Yes	Yes	Yes	Yes
	pacing indicator	Yes	Yes	Yes	Yes	Yes	Yes
	bid requests / responses / won	Yes	On request	Yes	Yes	Yes	Yes
location	postcode	Yes	Yes	Yes	Yes	Yes	Yes
	latitude / longitude	On request	Yes	Yes	Yes	On request	Yes
	city / region	Yes	Yes	Yes	Yes	Yes	Yes
inventory	ssp	Yes	Yes	Yes	Yes	Yes	Yes
	frame id	Yes	Yes	Yes	Yes	Yes	Yes
	screen name	On request	Yes	Yes	Yes	On request	Yes
	publisher	Yes	Yes	Yes	Yes	Yes	Yes
	active panels	Yes	On request	Yes	Yes	Yes	Yes
troubleshooting, verification & campaign measurement	loss reasons / troubleshooting	Yes	On request	Yes	Yes	Yes	Yes
	proof of play date (impressions / time of play to the specific time of play)	On request	On request	On request	On request	On request	On request
	verification	Yes	Yes	Yes	Yes	Yes	Yes
	Types of measurement accessible through DSP or additional service	Yes	Yes	Yes	Yes	Yes	Yes

Plus a Supply Overview coming very soon....

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JCDecaux PROGRAMMATIC

JCDecaux

Effectiveness

measured in hard business terms



Brands

15 global and local brands, across a broad cross-section of categories

Metrics

Analysis of 15 cases, each with unique objectives and success metrics

Effectiveness

Identifies the ingredients for Programmatic Out-of-Home effectiveness

Programmatic Out-of-Home has emerged as a powerful tool for savvy brands and marketers

ADVANTAGE I



The power
of contextual
relevance

ADVANTAGE II



Precise audience
targeting and
engagement

ADVANTAGE III



Power to drive
measurable
real-world
impact

ADVANTAGE IV



Amplification via
cross-channel
integration

The power of contextual relevance

Programmatic Out-of-Home enables brands to deliver highly targeted, contextually relevant messages that truly resonate with audiences in the precise moment, and place, they are deployed.

JCDecaux PROGRAMMATIC

JCDecaux



Guinness

Category	Alcohol
Agency	UM / KINESSO
DSP	Vistar
Investment	Medium
Formats	Digital Small Format, Rail, Airports
Markets	NSW, VIC, QLD & WA

+100K
incremental pints
drunk in winter

Campaign background

To challenge Australia's summer beer dominance and create new cold weather moments, Guinness launched an innovative campaign to let consumers know it was the perfect time for a pint of Guinness.

The campaign incorporated real-time weather conditions, proximity planning to pubs, 21 different dynamically optimised creatives, and QR codes.

Results

The campaign was a remarkable success, growing the Guinness brand and increasing sales.

- #1 +100k incremental pints drunk in winter (+13% increase in consumption YOY)
- #2 Contributed to 2,000 sampling opportunities through the free pint giveaway
- #3 +3%pt growth in brand salience
- #3 +17% increase in brand power

Precise audience targeting and engagement

Programmatic Out-of-Home allows brands to reach their desired audience segments with unparalleled precision, leveraging data-driven insights to maximise engagement and drive superior message impact.



Dior Sauvage

Category	Fragrances / Luxury
Agency	GroupM Nexus
DSP	Hivestack
Investment	Low
Formats	Digital Large Format
Markets	NSW & VIC

38%
campaign recall

Campaign background

Dior extended an established campaign for the Sauvage fragrance to elevate the Dior brand in the lead up to the crucial retail and Christmas period.

Dior used programmatic to access JCDecaux's premium Digital Large Format assets that aligned with the brand's luxury status.

Results

Despite a small budget, access to quality sites via Programmatic, combined with strong creative, resulted in extremely high campaign recall, some +15-20% more than expected for a single format campaign. Those who recall to the campaign had increased familiarity, consideration and favouritism for the brand, resulting in a timely brand elevation just before Christmas.

- #1 38% campaign recall
- #2 +10% familiarity amongst audience who recall
- #3 +6% consideration amongst audience who recall

Driving measurable real-world impact

Programmatic Out-of-Home campaigns have consistently demonstrated their ability to drive tangible business outcomes, such as increased store visits, app downloads, and ultimately, sales.





Tourism Tasmania

Category	Tourism
Agency	Starcom
DSP	Yahoo!
Investment	High
Formats	Digital Large Format, Digital Small Format, Rail, Airports
Markets	National

+140%
 footfall uplift attributed to
 Large Format

Campaign background

Tourism Tasmania activated an omnichannel campaign, led by programmatic Out-of-Home, to change the perception of a Tasmanian winter holiday and provoke a profound emotional response from audiences.

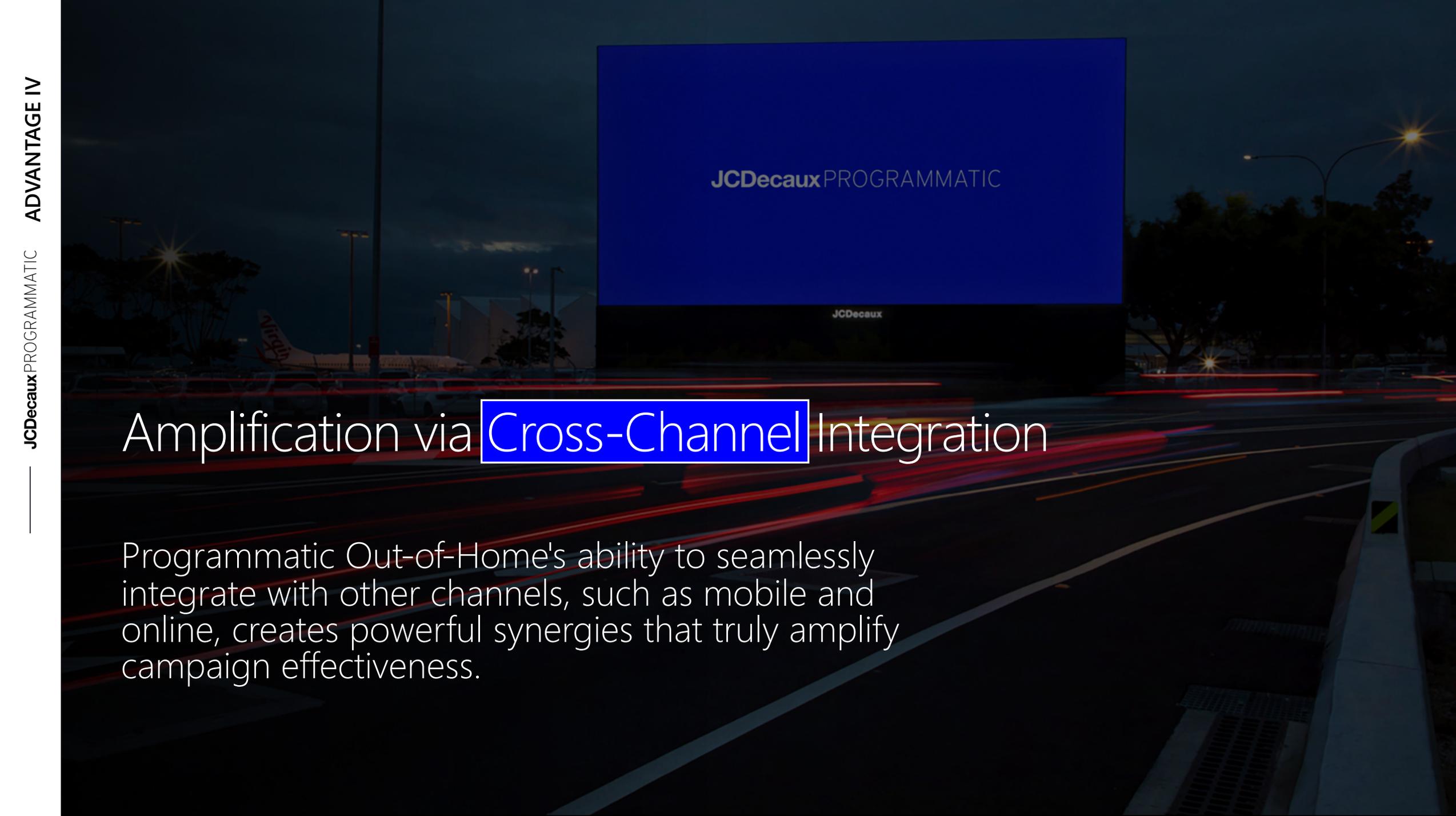
JCDecaux's Adobe Audience Manager integration allowed asset selection best placed to interact with Tourism Tasmania's specific audience segments.

Results

These results demonstrated programmatic Out-of-Home's ability to drive physical visits and influence online engagement.

- #1 +140% footfall uplift attributed to Digital Large Format
- #2 +151% uplift in web traffic vs. control group
- #3 +45% increase in footfall from digital native
- #4 +29% increase in footfall from programmatic display

Investment: Low: <\$50k, Medium: \$50-99k, High: \$100k+
 Source: Near Footfall & Web Visitation Attribution Study



JCDecaux PROGRAMMATIC

JCDecaux

Amplification via **Cross-Channel** Integration

Programmatic Out-of-Home's ability to seamlessly integrate with other channels, such as mobile and online, creates powerful synergies that truly amplify campaign effectiveness.



Pepsi Max

Category	FMCG
Agency	PHD
DSP	Vistar
Investment	High
Formats	Digital Small Format
Markets	National

+10%

points familiarity with
Pepsi Max Soda Shop range

Campaign background

To launch its Soda Shop range, Pepsi Max used Out-of-Home to increase awareness, generate hype, and encourage product trial.

A tactical programmatic activation across Small Format, targeting diet cola consumers in key commuter hubs, was combined with a reach driving JCDecaux Transit campaign to ensure the nostalgic Soda Shop flavours were top-of-mind.

Results

Strong campaign awareness grew familiarity with the Soda Shop range and delivered an increase in brand preference for the Pepsi Max masterbrand.

- #1 +10%pts familiarity with Pepsi Max Soda Shop range
- #2 +2%pts Pepsi Max brand preference



Swisse

Category	Supplements
Agency	PMG
DSP	JCD Managed Service
Investment	Medium
Formats	Digital Large Format, Digital Small Format, Digital Rail
Markets	National

14%

increase in mobile device ID's exposed by Programmatic activity

Campaign background

Swisse aimed to cement its position as Australians #1 sleep supplement brand amongst P25-34, The 2024 challenge was to sustain momentum with a shifting focus to Out-of-Home and building brand momentum and elevate the sophistication of Out-of-Home to cut through even further.

To deliver greater cut-through during key **"Moments of Fatigue"** Swisse utilised Programmatic time-of-day flighting to target weary commuters with relevant messaging on Monday mornings and the days leading up to daylight saving.

Results

The programmatic campaign delivered increased brand awareness, brand recall and sales growth

- #1 14% incremental mobile device ID's exposed by Programmatic activity
- #2 Increase in brand recall (29%) vs (15%) direct

Investment: Low: <\$50k, Medium: \$50-99k, High: \$100k+
Source: Pureprofile Pre/Post Campaign Study

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JCDecaux PROGRAMMATIC

JCDecaux

Benefits of trading programmatically **in Perth**

TIME & DAY TARGETING FLEXIBILITY

Exploring data and insights around time for certain brands or products to drive flighting efficiencies

COMPLETE CONTROL OF DELIVERY

Optimise and upweight specific strategies depending on performance, minimising wastage

SPEED TO MARKET, AGILITY & AVAILABILITY

Ability to activate campaigns outside of set posting periods. Campaign can be live within hours

SPECIFIC SITE SELECTION OR NARROW TARGETING

If advertisers want to move away from network buys or provide very specific target audiences

TACTICAL BUDGETS

Tactical budgets that allow for the cherry-picking of sites, short timeframes and efficient buying

REPORTING & MEASUREMENT

Measurement studies and mobile device IDs are very accessible via DSPs as online and offline converge

Agenda

- 1 The global lens from JCDecaux
- 2 Local growth blockers and accelerators
- 3 The Definitive Guide to Programmatic Out-of-Home Success
- 4 Key takeaways for the Perth market
- 5 Q&A

JCDecaux PROGRAMMATIC

JCDecaux

JCDecaux

JCDecaux PROGRAMMATIC

IAB Australia Perth Market Update

market update – data privacy, consent & reducing ad waste

perth market
update

jonas jaanimagi

technology lead,
iab australia



Main Areas of Reform

- Development of a Children's Online Privacy Code
- Inclusion of technical and organisational measures as required reasonable steps to protect PI under APP11
- New mechanism to prescribe countries as having substantially similar protections to allow cross border disclosure
- Streamlined information sharing regime during a data breach
- New tiered penalty regime and enhanced court powers
- Requirements to include details of automated decision making in privacy policies

Other Reform

- New Ministerial power to make (temporary or otherwise) APP codes
- More targeted emergency declaration requirements
- New OAIC power to conduct public inquiries
- New OAIC determination power to provide support after breach
- New investigative and monitoring requirements



New Statutory Tort

New cause of action for individuals as a statutory tort for serious invasions of privacy, except against journalists, law enforcement bodies, and where in the public interest

Doxxing

Criminalising people's use of personal data in manner that is menacing or harassing to an individual

Not included...

Promised consultation on future reform for other areas agreed to by Government including:

- Organisational accountability
- broadened PI definition
- amendments of small business and employee records exemption
- mandatory privacy officers
- enhanced consent
- 72-hour notification
- 'fair and reasonable' test
- direct right of action;
- opt-out of direct marketing
- more detailed privacy policies
- mandatory privacy impact assessments



On September 12, 2024 [Policy and Regulation](#)

SHARE



First tranche of Privacy Reforms Released – advertising specific reforms not included

The [Privacy and Other Legislation Amendment Bill 2024](#) has today been introduced into the Parliament. More analysis to follow, but below is a brief summary of what it contains:

- **A statutory tort for serious invasions of privacy**

The statutory tort is informed by the ALRC's proposed version of the tort in its 2014 report on serious invasions of privacy.

OUR PRIVACY
POLICY HAS
CHANGED

Accept

WHACK
-A-
**CONSENT
NOTIFICATION**

AGREE TO
OUR TERMS
OF USE

Accept

WE STORE
COOKIES

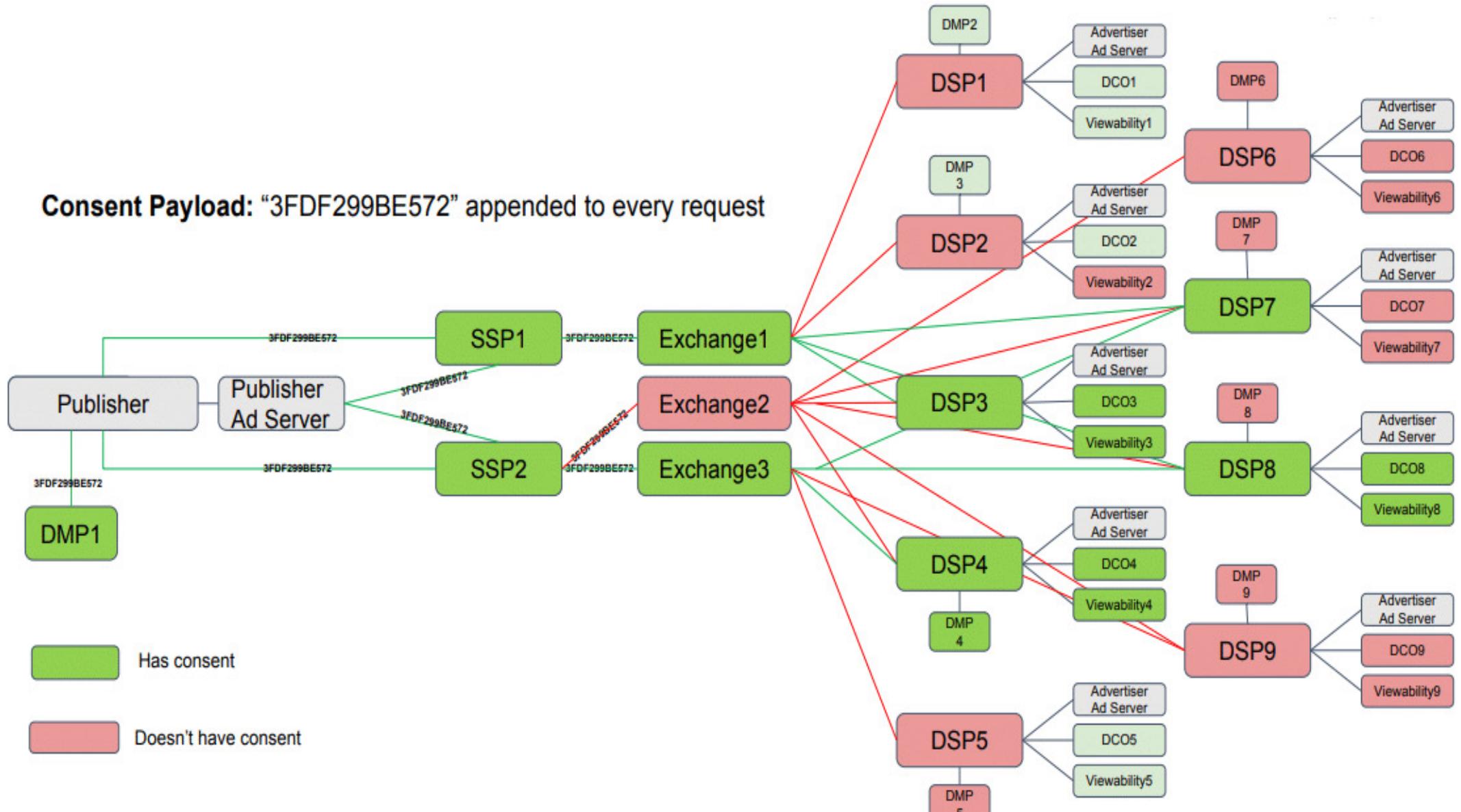
Accept

WE SHARE
DATA WITH
THIRD PARTIES

Accept

	United States	European Union
Consent Model	Notice and Opt-Out	Notice and Opt-In
What it means	You are informed about privacy-invasive data practices and given the opportunity to broadly object	You are informed upfront about privacy-invasive data practices and asked to expressly consent to each
Default assumption	You automatically agree until you say otherwise	You do not agree until you actually do
Cultural driver	Stronger emphasis on the freedom of individuals and companies to contract and exchange information.	Stronger emphasis on protecting individual's privacy rights and freedoms.
Example laws	California Consumer Privacy Act (CCPA) US CAN-SPAM Act	General Data Protection Regulation (GDPR) ePrivacy Directive (ePD)

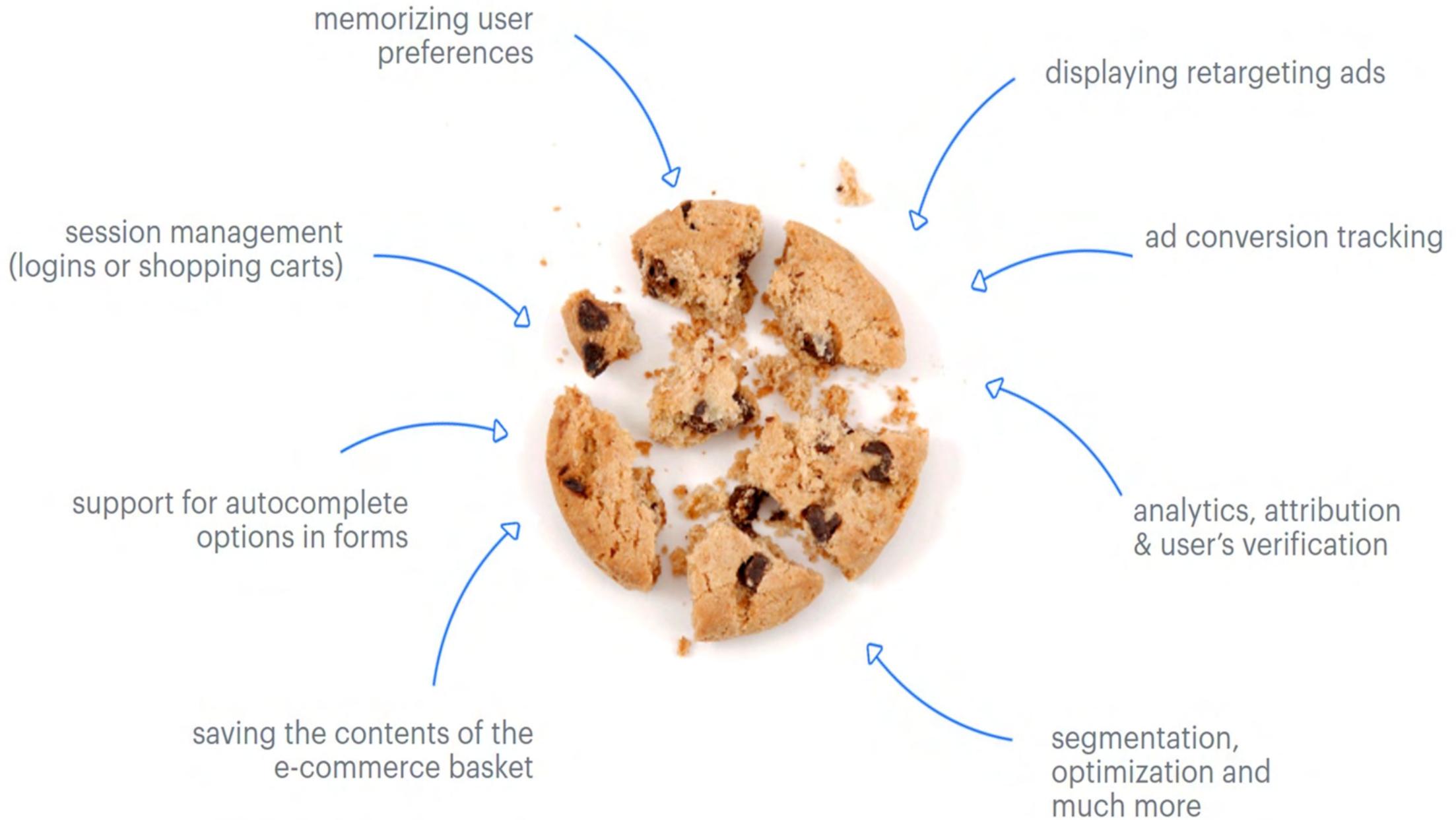
Consent Payload: "3FDF299BE572" appended to every request



- Has consent
- Doesn't have consent

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





1st vs. 3rd Party Cookies

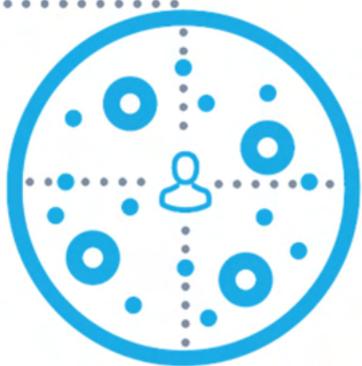
1st Party Cookies



Where did they browse on the website?



Where did they click?



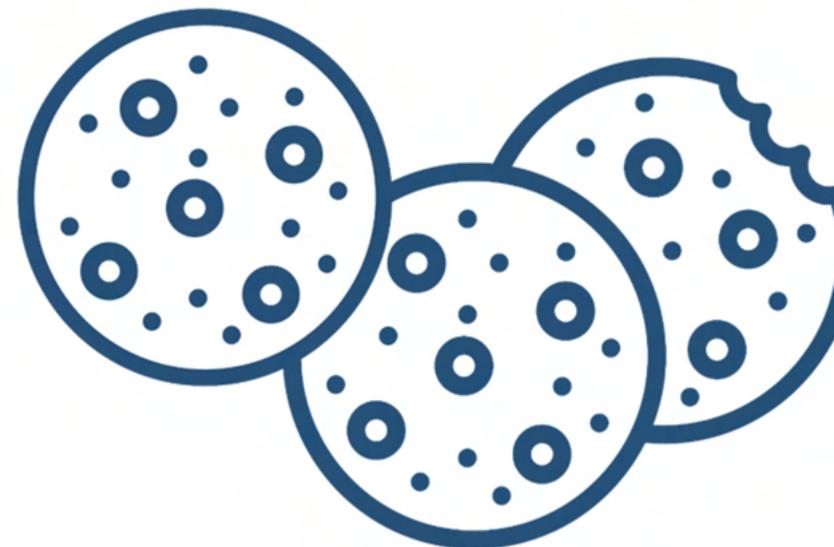
Time on website



Where did they stop?

They allow the company that has a direct relationship with the user collect data on your own domain.

3rd Party Cookies



They are collected by third parties, in general independent Adtech platforms, for marketing and digital advertising purposes.

The 3 Core Future-Proofed Approaches

- ID Enabled Responsible Addressability
- Contextual / Semantic & Curated Audiences
- On-Device Facilitated Personas

document release

2024
edition

identifiers explainer guide and matrix

iab.
australia

contextual targeting handbook.

June 2021

**WORK IN
PROGRESS**

iab.
australia



Curated Audiences

iab.TECH LAB



A new path for Privacy Sandbox on the web

Share



Jul 22, 2024



Anthony Chavez
VP, Privacy Sandbox

Chrome
54.04%

Safari
30.1%

Edge
8.42%

Firefox
2.94%

Samsung Internet
2.94%

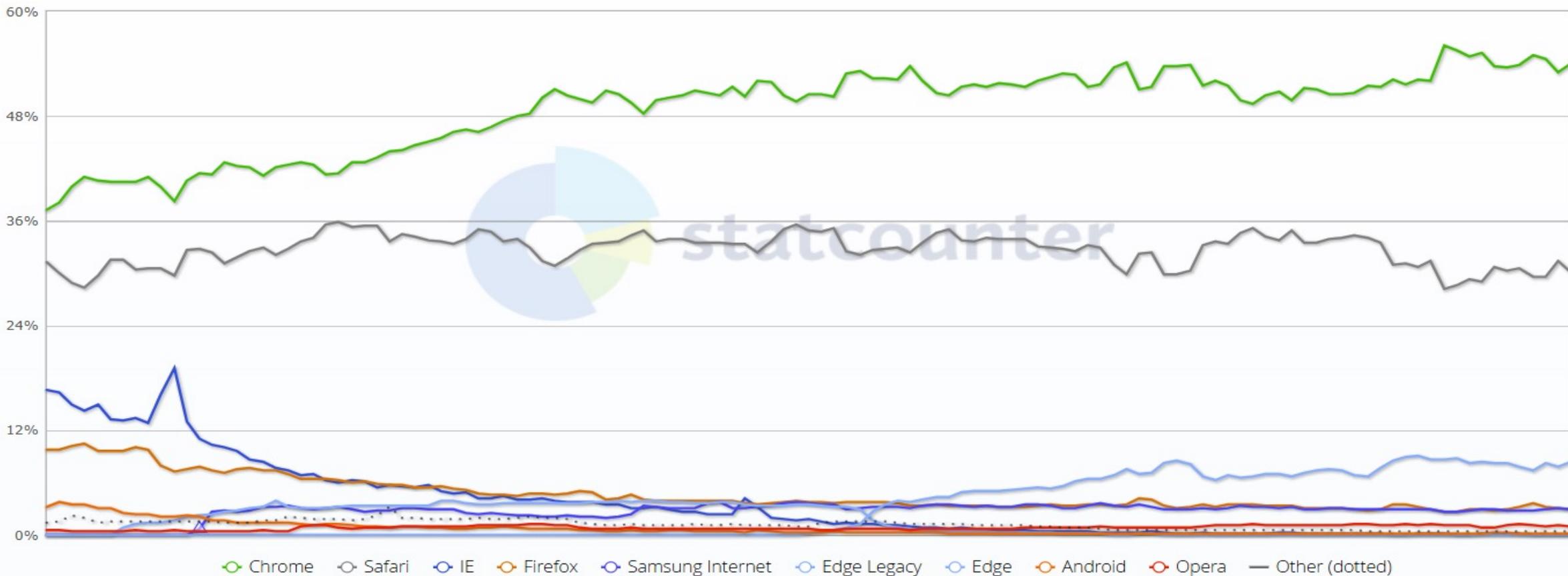
Opera
1.04%

Browser Market Share in Australia - February 2025

Browser Market Share Australia

Feb 2015 - Feb 2025

[Edit Chart Data](#)





Search flags

Reset all

Ad Selection API

Enables the Ad Selection API and associated features such as Attribution Reporting, Fenced Frames, Shared Storage, Private Aggregation. – Mac, Windows, Linux, Android

[#edge-ad-selection-api](#)

Disabled



Ad Selection API - Consented Debug Token

Enables Ad Selection API debugging with the provided token. Privacy-preserving auctions running on an Ad Selection API trusted server with a matching token will be able to log information about the auction to enable debugging. Note that this logging may include information about the user's browsing history normally kept private. – Mac, Windows, Linux, Android

[#edge-ad-selection-debug-token](#)

Disabled



Ad Selection API - Enrollment Overrides

Allows a list of sites to use Ad Selection API features without them being enrolled and attested into the Ad Selection Origin Trial. – Mac, Windows, Linux, Android

[#edge-ad-selection-enrollment-overrides](#)

Disabled



Internet Culture ▾

Privacy & Security

Products ▾

Mozilla ▾



Download Firefox

The reason we've stepped away from making blanket claims that "We never sell your data" is because, in some places, the LEGAL definition of "sale of data" is broad and evolving. As an example, the California Consumer Privacy Act (CCPA) defines "sale" as the "selling, renting, releasing, disclosing, disseminating, making available, transferring, or otherwise communicating orally, in writing, or by electronic or other means, a consumer's personal information by [a] business to another business or a third party" in exchange for "monetary" or "other valuable consideration."

Similar privacy laws exist in other US states, including in Virginia and Colorado. And that's a good thing — Mozilla has long been a supporter of data privacy laws that empower people — but the competing interpretations of do-not-sell requirements does leave many businesses uncertain about their exact obligations and whether or not they're considered to be "selling data."

In order to make Firefox commercially viable, there are [a number of places where we collect and share some data with our partners](#), including our optional ads on New Tab and providing sponsored suggestions in the search bar. We set all of this out in our [Privacy Notice](#). Whenever we share data with our partners, we put a lot of work into making sure that the data that we share is stripped of potentially identifying information, or shared only in the aggregate, or is put through our privacy preserving technologies (like [OHTTP](#)).

How can I disable PPA?

You can easily disable the privacy-preserving attribution feature in Firefox if you prefer not to participate. When you opt out, websites won't be informed of your decision.

To opt out, follow these steps:

1. Click the menu button ☰ and select **Settings**.
2. In the **Privacy & Security** panel, find the *Website Advertising Preferences* section.
3. Uncheck the box labeled **Allow websites to perform privacy-preserving ad measurement**.



Website Advertising Preferences

Allow websites to perform privacy-preserving ad measurement

This helps sites understand how their ads perform without collecting data about you. [Learn More](#)

iOS
56.55%

Android
42.7%

Samsung
0.71%

Windows
0.02%

Linux
0.01%

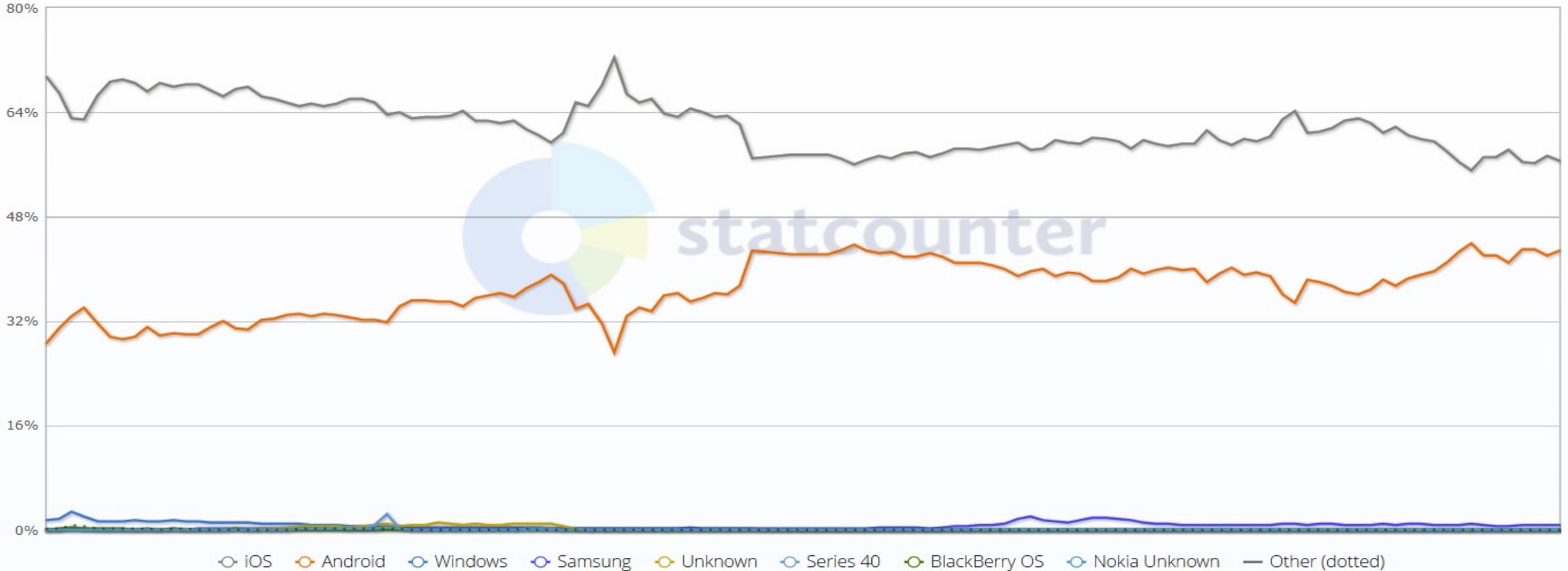
Unknown
0.01%

Mobile & Tablet Operating System Market Share in Australia - February 2025

Mobile & Tablet Operating System Market Share Australia

Feb 2015 - Feb 2025

[Edit Chart Data](#)



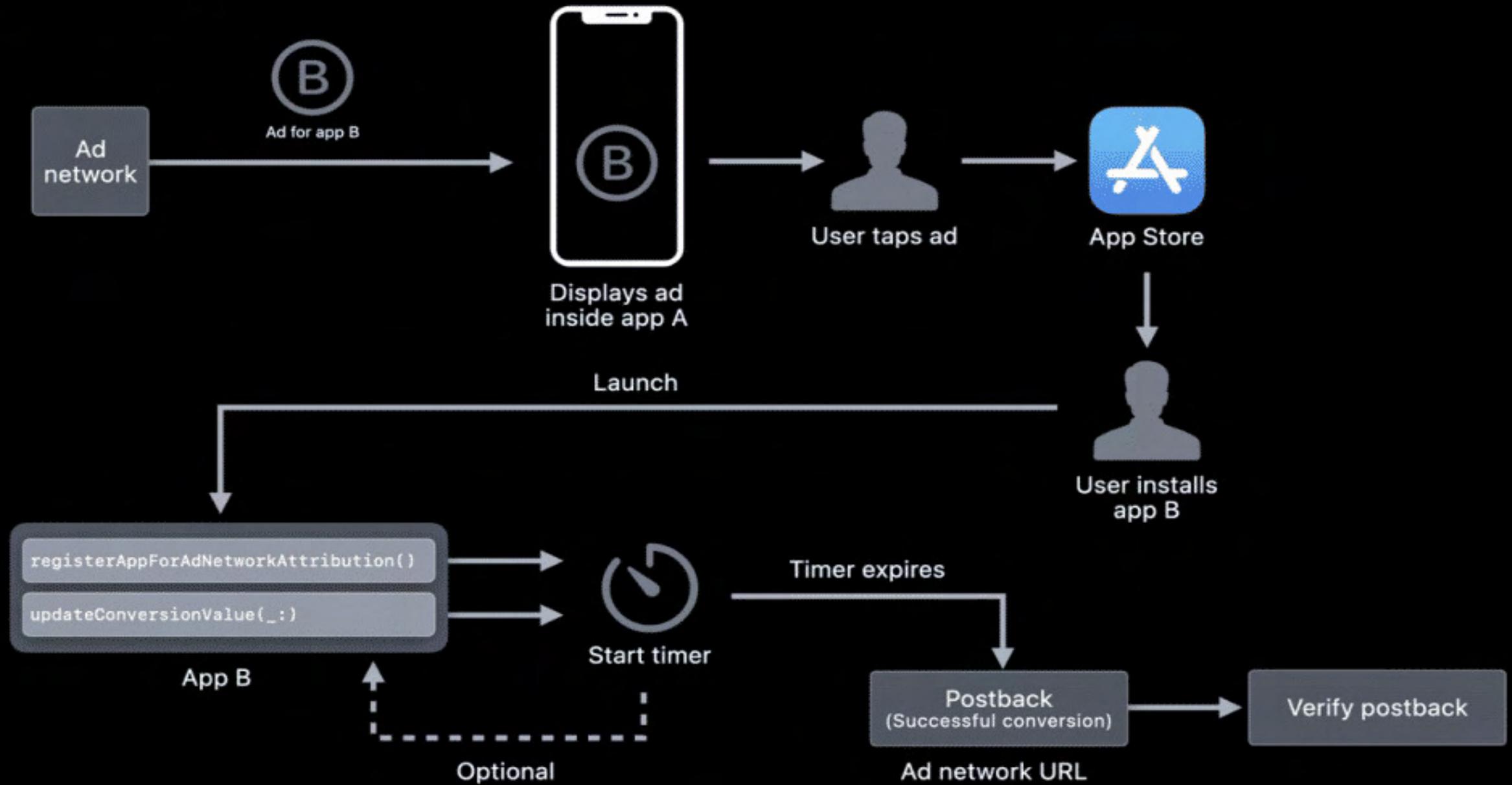
Privacy Sandbox on Android

Privacy Sandbox will introduce new technology that operates without cross-app identifiers – including Advertising ID. This helps apps remain free through ads while your data stays protected.

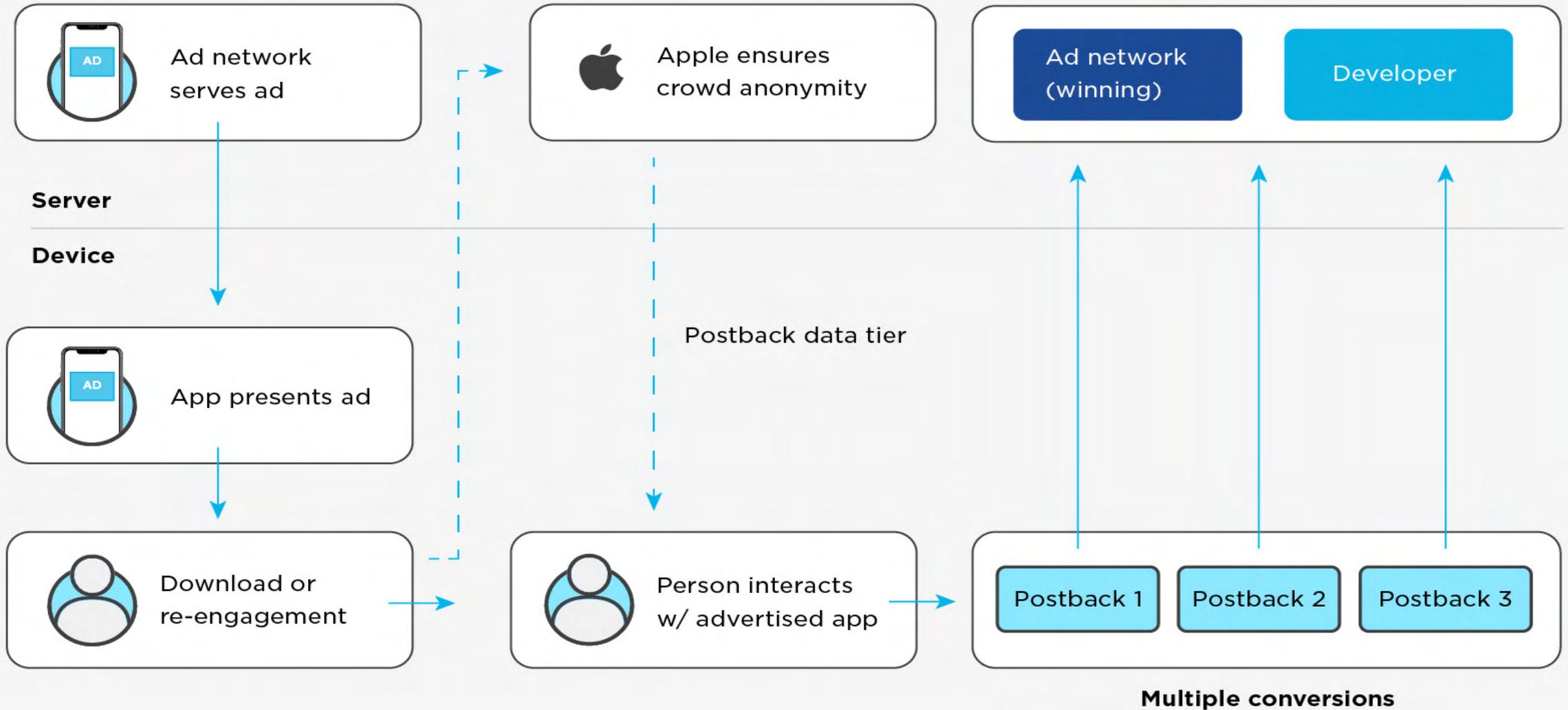
Privacy Sandbox also aims to limit covert tracking and collection of user data, including safer ways for apps to integrate with third-party developers.



SKAdNetwork



AdAttributionKit



These PETs are actively being used across all of our examples, today:



Advertising Use Case	DP <small>Differential Privacy</small>	FED/L <small>Federated Learning</small>	K-A <small>K-Anonymity</small>	HME <small>Homomorphic Encryption</small>	TEE <small>Trusted Execution Environments</small>	MPC <small>Multi-Party Computation</small>
Reach & Frequency	X	○	○	X	○	○
Fraud Detection	○	X	○	○	○	X
Audience Activation	X	○	X	X	○	○
Remarketing	○	X	○	○	X	X
Lookalike Modeling	X	X	○	X	○	○
Brand Lift	X	○	○	X	○	○
Attribution & Incrementality	X	○	○	X	○	X

adtech
matters with
jonas jaanimagi

**de-identification,
encryption & anonymisation
an explainer**



Privacy Lab

**Addressability
and Privacy
Enhancing
Technologies**

Addressability and
Privacy Enhancing
Technologies
(PETs) Working
Group

Tech Lab is launching a Privacy Lab to educate the industry on **Privacy Enhancing Technologies (PETs)** applications in digital advertising and to experiment with what technologies work most effectively for each stakeholder’s business. By providing this test-bed, Tech Lab can reduce the costly implementation time for many companies to evaluate these new technologies. Test various PETs in the Tech Lab Privacy Lab, tune them to your optimal settings, and redeploy them in your environment, saving time and money.

Q2 2025



ACIF

Ad Creative ID Framework

iab.TECH LAB

ONE AD, MANY IDENTITIES



Different Demand Paths

Direct
Indirect
Reseller
Programmatic
Inventory Split partners
Content Rights
Device Rights
Programmer rights

P&G

Buying across a lot of different endpoints

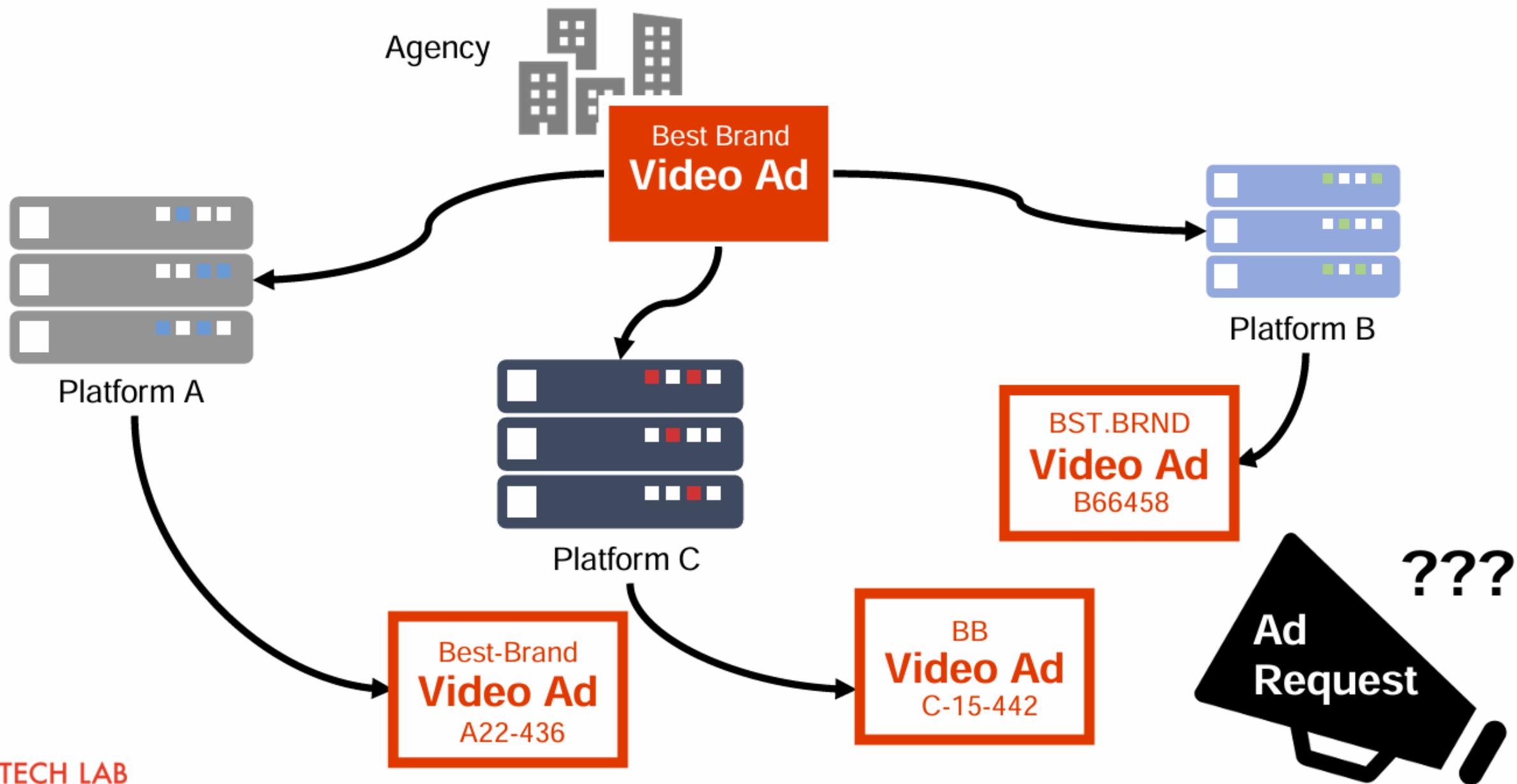
P&G
Procter
Procter & Gamble
P and G
PG
P-G



Same ad, over and over and over



One Ad, Many Identities



More than reconciliation

Knowing what ad is in the response is critical...

-  Is it competitive to other ads in the same ad pod?
-  How many times has this ad already been shown?
-  Does the ad fit with content for brand safety?
-  Where has my ad been?

Key Components of ACIF

1 **Unique Identifier for Each Ad Creative**

At the core of ACIF, a unique identifier (ID) is assigned to every ad creative. This ID acts as a digital fingerprint, ensuring the ad is recognized and tracked consistently across all platforms and throughout its entire lifecycle. Registering ad creative and using the unique ID assigned is essential for maintaining consistency in how the ad is handled, whether delivered on a CTV platform, a mobile app, or a web video player.

2 **Registries**

The organizations responsible for maintaining records of these unique IDs and the associated metadata for each registered ad creative. Examples of such registries include AD-ID in the United States and ARPP in France. These registries ensure that the unique IDs are standardized and that the metadata attached to each ad is accurate and consistent.

3 **Standardized Use of IDs**

ACIF promotes the standardized use of these unique IDs across all platforms and systems involved in the ad supply chain. This means that regardless of where the ad is served or what platform it appears on, the same ID is used to track its performance, manage its delivery, and report its results. This standardization eliminates the discrepancies that can occur when different platforms use different identifiers or labels for the same ad.

4 **Directory**

The framework includes a directory that lists all participating registries and provides information on validating the unique IDs administered by listed registries. This directory helps all stakeholders in the ad supply chain to easily verify the authenticity and details of an ad's unique ID, making it easier to manage and optimize ad campaigns.

5 **Validation API**

To facilitate the verification process, a standardized API will allow systems to validate unique registered IDs and access the associated metadata. This API ensures that every platform or system involved in delivering or reporting on the ad can easily confirm its identity and retrieve the correct information, ensuring consistency and accuracy across the board.

Benefits Summary

#1

Creative Reconciliation

ACIF eliminates millions of hours spent tracking down ads, matching data logs and validating campaign information.

#2

Frequency Capping

Today, the same video ad often has different sources, identifiers, and labels. ACIF makes it easier for ad-decisioning algorithms to manage ad frequency.

#3

Competitive Separation

ACIF will make it easier to ensure that competitive ads are appropriately separated.

#4

Cross-platform TV measurement

One persistent creative ID enables accurate counting with de-duplication across linear and digital channels.

#5

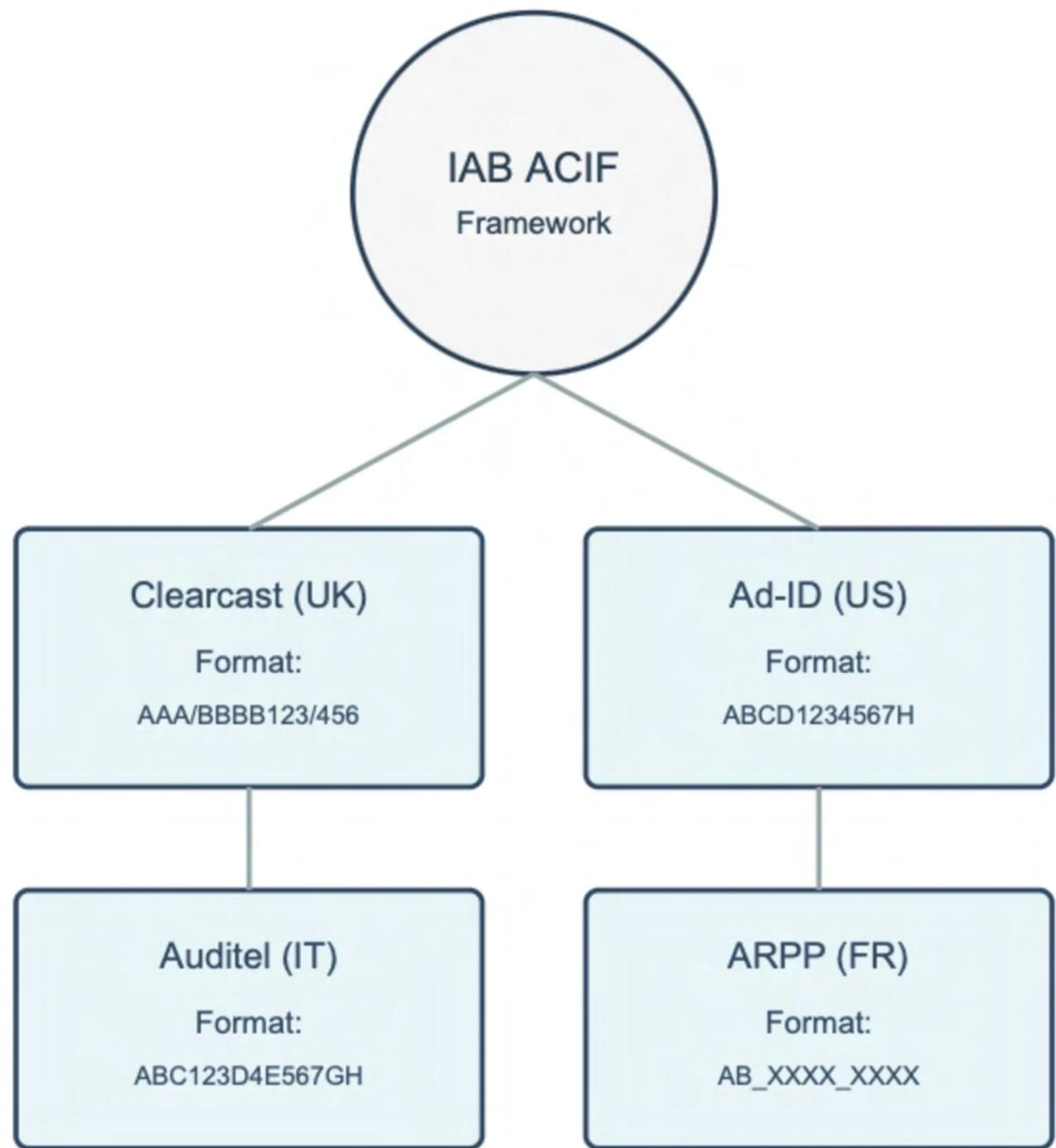
Campaign ROI

Understanding campaign performance for specific ad creative enables advertisers to take action and vastly improve the overall campaign ROI.

#6

Brand and publisher reputation

A stable unique ID helps ensure contextual relevance, competitive separation and brand suitability, providing high-quality content experiences.





- Home
- Resource Center
- Transparency Center
- Getting Started
- Data Explorer
 - Compliance
 - Business
 - Supply Chain
- API Access
 - Compliance
 - Business
 - All

Specification Adoption

AdTech Type:

Specification:

Version:

Find Companies

Company	Domain Name	AdTech Type	Specifications
Clearcast	clearcast.co.uk	Ad Creative Registry	View Company
ARPP - Autorité de Régulation Professionnelle de le Publicité	arpp.org	Ad Creative Registry	View Company
AD-ID	ad-id.org	Ad Creative Registry	View Company

What is Required Here in Australia?

- 1. Establish (or leverage) a local Registry** - The key starting point is to establish a local registry here that maintain records for ad creative and assign each a unique ID. We are assuming that this already exists for TVC through ClearAds, so are hoping to build on this for all video assets with help from XR Extreme Reach.
- 2. Standardise the use of registered IDs** – This does rely upon the use of VAST and a recent addendum does ensure ease of transport of a registered ID through the supply chain (via the UniversalAdId field). Establish this as standard industry practice here will require a united effort.
- 3. ACIF Directory** - This is a centralised solution managed by IAB Tech Lab which enables ad systems to identify where and how to validate a registered creative ID from a participating Registry. Minimal requirements for a directory will include a registry URL/code as a unique identifier for the registry and lookup info so that a business can validate each ID. We will need to ensure any local registry can meet those requirements and formally participate in the dedicated framework.
- 4. Validation** - The final component of ACIF is the ability to validate registered ad creatives when their unique IDs are encountered in the video ad supply chain. Ad tech companies wishing to validate can use the ACIF Directory to look up the ad registries and how each enables validation and metadata retrieval. Again, we'll need to test this via the Validation API and support its adoption locally.

I think we may have a solution to all our problems.



MEDIUM



LOW

HIGH

RISK

Brand Safety - Considerations

- Establish & Enforce a Framework
- Review Your Technology Partners
- Demand Transparency with Commercial Partners
- Involve & Empower Highly Competent Humans

Keywords only



Keywords
[killer]

The Most **Killer** Beauty Looks from the 2021 Grammy Awards



Even during this uncertain time, there's one thing we can expect from the Grammy Awards: killer hair and makeup. This isn't the Oscars. It's not even the more laid-back Golden Globes. This is when musicians and celebs go all out and experiment with new looks they haven't tried before. Even during a mostly remote show, the Grammys beauty for 2021 is no different. There's no subtle no-makeup makeup here—just bold, look-at-me beauty. And we live for it.

Contextual Targeting



Content Categories
[celebrity style]
[beauty]
[makeup & accessories]

Keywords
[hair]
[makeup]
[Grammy's]
[beauty]
[celebrity]

The Most **Killer** Beauty Looks from the 2021 Grammy Awards



Page Safety & Sentiment
[safe overall]
[none of the 9 categories detect]
[neutral tone]

Even during this uncertain time, there's one thing we can expect from the Grammy Awards: killer hair and makeup. This isn't the Oscars. It's not even the more laid-back Golden Globes. This is when musicians and celebs go all out and experiment with new looks they haven't tried before. Even during a mostly remote show, the Grammys beauty for 2021 is no different. There's no subtle no-makeup makeup here—just bold, look-at-me beauty. And we live for it.

NOW THAT OUR DIGITAL AD HAS BEEN WORDSMITHED, SCREENED, PROOFED, AND FINALLY APPROVED BY LEGAL, LET'S CROSS OUR FINGERS IT DOESN'T GET PLACED ON A SITE NEXT TO PORN.





loud & clear

maximising effectiveness
in digital audio



kai battaglione

national sales director – programmatic



harness
the potential

audio is wildly
underutilised

by saying the
right thing



yearly investment
increased

+17.8%

\$313 m

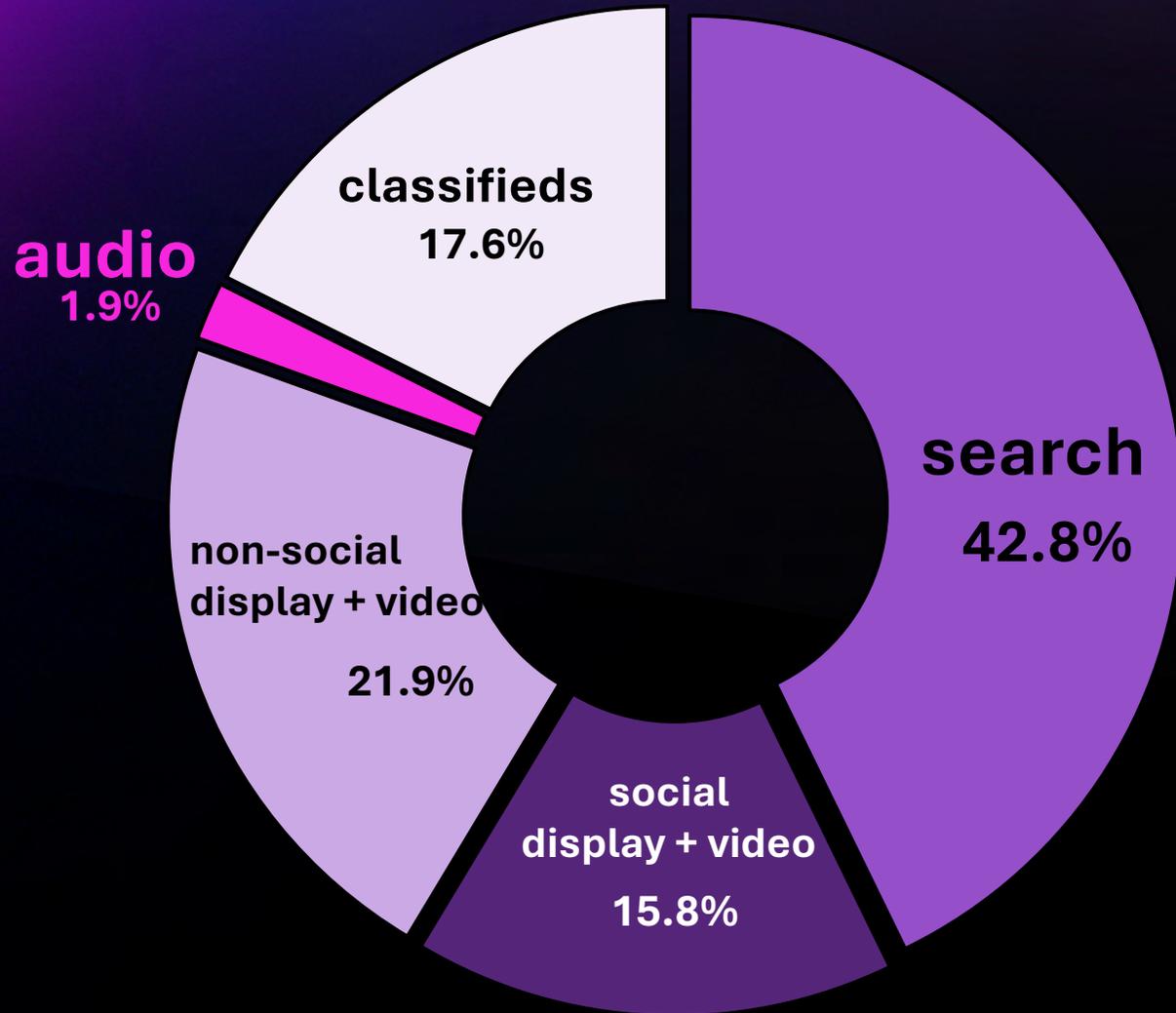
2024 digital audio

\$195 m

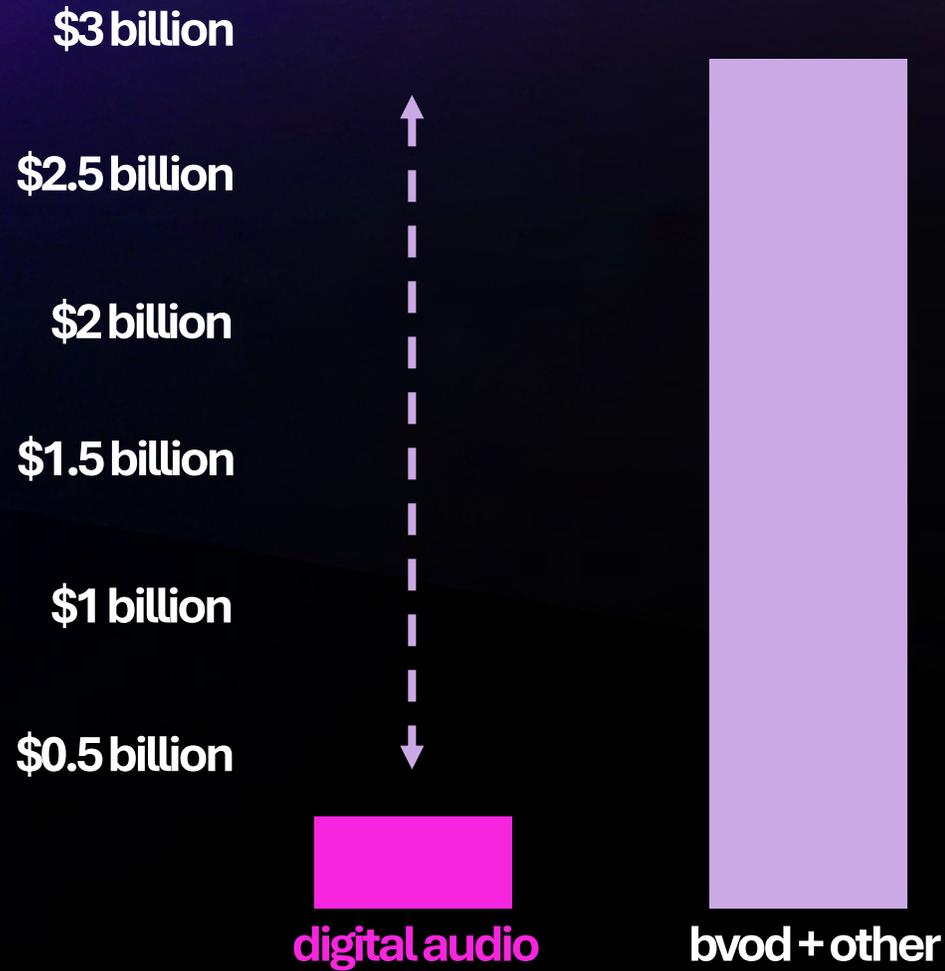
streaming

\$118 m

podcast



but **audio** remains a very small piece



even compared to
bvod & other video **only**



77%

australian's listen to digital audio weekly

and they listen
for a long time



so if it isn't
the audience,
is audio less effective?



nope.

audio
works



measurement



impact



amplification



reach & frequency

brand impact



brand lift

visitation



purchase

roas

insight
through the funnel



+56%
attentive seconds
over **all** other digital

23x
more trust
than social

audio hooks you



shifting **+1.2%** of audio spend
increases roas by an average

+56%

it's a media **multiplier**



- ✓ you can **measure** it
- ✓ it **connects** with people
- ✓ it makes the **whole plan** better

harness
the potential

audio is wildly
underutilised

by saying the
right thing

harness the potential



morning peak
commuters
high freq. listens

afternoon peak
mood regulator
background soundtrack

evening peak
sparks discussion
knowledge is power

the whole is more than the sum of its parts
make it easy via automation

saying the
right thing



	daytime buying	audio listening
shopping in person	80%	73%
shopping online	77%	70%
running errands	85%	75%
dining out	75%	72%

context equals conversion





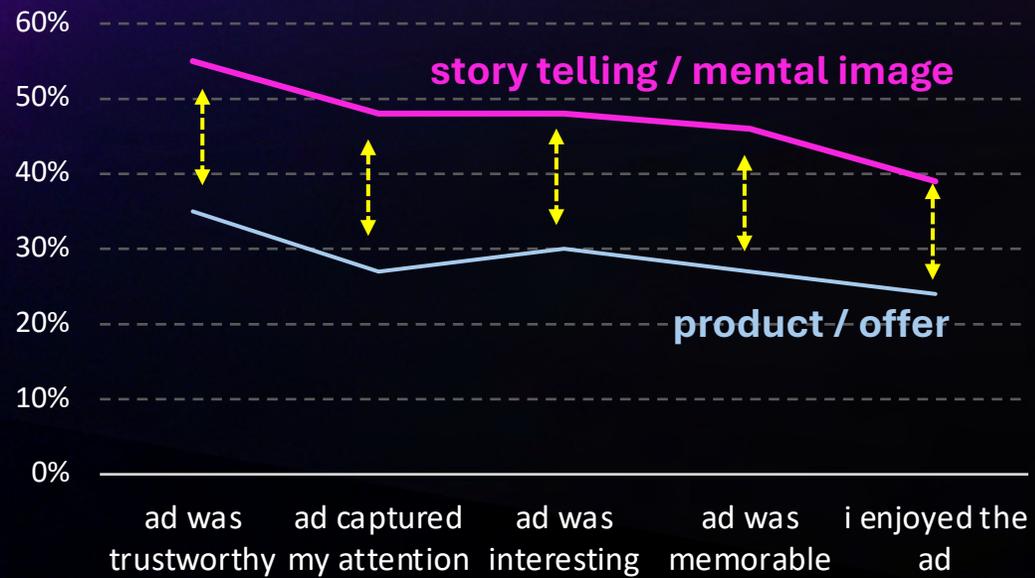
75% ~ 16%

audio creative is
product/offer based

marketers using
audio for sales/roi

align your message

omd marketing intelligence – how, what & why australian's connect with audio
iab audio advertising state of the nation report '25



emotion equals
engagement

audio is wildly
underutilized



harness
the potential

by saying the
right thing

combine
audio's parts



context
equals conversion

optimise
activate & measure



align
your message

automated
trading



emotion
equals engagement

arn

the sound of entertainment

