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**Annual
Report
2021**

2021 Was the Year That Taught the World That The Future Is Unpredictable

It was a year that taught us the importance of perspective and becoming an active participant in problem-solving. It also taught us that the significant problems we face are surmountable, as long as we all work together.

As an industry, we've learned to shrug off one uncertainty after another, to take hard hits in stride, and to maintain our focus on the future.

We've learned that, as basketball great Michael Jordan put it, "Obstacles don't have to stop you. If you run into a wall, don't turn around and give up. Figure out how to climb it, go through it, or work around it."

We've had a heady glimpse of what lies ahead, in everything from the non-stop rise of streaming and gaming, to ubiquitously useful QR codes, to the early dawn of the metaverse. If there has been any silver lining to the pandemic, it is that it has allowed us a glimpse into our future—and that future means endless opportunity and potential.

However, we are not going to realize that potential if we can't let go of some baggage of the past. Growth brings lots of new challenges, but there are plenty of challenges that are all too familiar.

We can't shrug off fraud, despite our progress over the years—especially as it spreads to exploding channels like CTV. Technology matters. Transparency matters.

We can't shrug off the patchwork of legislation that keeps coming out of the dysfunction in Washington.



We can't shrug off the critical need for diversity and inclusion, especially when new thinking is needed.

On all of these issues and more, the industry needs action and not words. So it's fair to ask, what is IAB actually doing about any of this?

We're tackling ad fraud and other issues head-on. We are updating the industry toolkit to bring new technical standards to the marketplace. We've brought on respected industry veteran Anthony Katsur as CEO of IAB Tech Lab.

Action, not words.

If you read our latest economic study about "[The Economic Impact of the Market-Making Internet—Advertising, Content, Commerce, and Innovation: Contribution to U.S. Employment and GDP](#)," you know the internet economy grew 7 times faster than the total U.S. economy and created over 7 million jobs in the last four years. Policymakers can't make good decisions unless they know that too.

We've significantly strengthened our efforts in Washington, hiring public policy pro Lartease Tiffith (formerly of Amazon) as IAB Executive Vice President, Public Policy. We've also onboarded Brendan Thomas as Vice President, Public Policy Communications.

Action, not words.

Diversity, equity, and inclusion (DEI) remains a critical issue. We've brought on DEI champion Jessalin Lam to lead IAB's Learning & Development and DEI Programs and launched the industry's first digital media apprenticeship program. We're making it easy for companies of every size to have an immediate impact. It's an intense year-long, on-the-job training program that builds powerhouse skills. If we want leaders for tomorrow, we must invest today.

Action, not words.

Speaking of which, this applies to IAB members too—including agencies, who are now able to be members in full.

Signing up as a member at IAB is no different than signing up for a gym membership. If you want the industry to get into shape you have to show up. You have to sweat. Inspiration and perspiration. You have to do the work.

There's more than enough heavy lifting for everyone, and we need the industry's strongest executives to join in. If we're not racing fast enough in 2022, IAB members need to join us in demanding that we move forward. Running in place won't get us anywhere.

**In 2022, we need action,
not words.**

We need to build on the momentum of 2021.

We need all of us, all in it together.

Let's make 2022 matter.

Yours respectfully,

David Cohen
Chief Executive Officer, IAB

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2021 Highlights Leading Through Unusual Times

2021 was a year of superlatives. The words *unprecedented, once in a lifetime, and volatile*, for example, have been used a lot. But 2021 was also a year of resilience, renewal, renaissance—and a time to reset.

A study released in October 2021 called **The Economic Impact of the Market-Making Internet**, commissioned by IAB and led by a researcher from Harvard Business School, shows just how powerful our industry’s penchant for reinvention, resilience, and renewal has been.

The internet economy grew seven times faster than the total U.S. economy over the past four years, directly created over 7 million jobs, and now accounts for 12% of the U.S. gross domestic product.

That’s an astonishing feat and clearly shows that the market-making internet has never been more important. But it has also never been more challenged.

In the U.S. in 2021, trust in the tech sector dropped precipitously to an **all-time low** of 57 out of 100, according to the Edelman Trust Barometer. The main reason for this drop is the increasingly “complicated” relationship between the public and technology—including the spread of misinformation, rising privacy concerns, and bias in artificial intelligence, all things which touch our industry profoundly.

There is no denying that Big Tech is under assault by lawmakers in Washington and there is major work ahead to persuade legislators to not harm small businesses in their efforts to take on the biggest players. Part of rebuilding that trust also means our industry needs to strike the right balance between convenient and creepy for consumers and deliver personalization without compromising trust.

And collectively, we need to think harder about the talent crisis and the new ways people want to live and work. According to the latest **Women in the Workplace** report

from McKinsey, **one in three women** have considered downshifting their career or leaving the workforce this year. A similar lack of support exists in diversity, equity, and inclusion (DEI) efforts. People are at the core of our industry, and they need support and opportunity to thrive.

Make no mistake: What happens in 2022 will shape our country, our world, and our industry for the next decade or more. It’s not going to be a year of getting back to normal.



David Cohen, Chief Executive Officer, IAB; **Anthony S. Fauci, M.D.**, Director, National Institute of Allergy and Infectious Diseases, National Institutes of Health (NIH); **2021 IAB Annual Leadership Meeting**

That thinking informs the theme for the 2022 IAB Annual Leadership Meeting, **Visions and Decisions**. In the months ahead, all of us will need to step up and lead with vision and conviction. There are hard decisions ahead that will have significant consequences as we collectively work to re-architect privacy and addressability and continue to push for national privacy reform. We’ll need to pull together, take the right kinds of risks, rebuild damaged trust, and expand the boundaries of the possible.

Our industry, which has had a gift for invention and re-invention since its earliest beginnings, will need to do all of that again—and do it better than ever.

2021 Highlights

Re-Architecting Privacy and Addressability

IAB and IAB Tech Lab have been focused on collaboration towards standards to achieve predictable privacy for consumers through the first parties they trust, increased accountability and trust for the industry, and improved market innovation and competition. IAB Tech Lab has also gathered the whole ecosystem from buyers (agencies and brands) to sellers (publishers) as a global initiative to re-architect how digital marketing works and how the loss of third-party cookies and other identifiers will profoundly affect the digital media and marketing industry.



David Cohen, Chief Executive Officer, IAB; **Tony Katsur**, Chief Executive Officer IAB Tech Lab; **2021 IAB Brand Disruption Summit**

As part of **Project Rearc**, the Tech Lab launched the core standards for responsible addressability and predictable privacy including the **Global Privacy Platform** document that represents progress toward a Global Privacy Platform (GPP) architecture. **The Accountability Platform** is designed to ensure that all digital advertising supply chain participants can consistently show that they are adhering to user preferences. The **Best Practices for User-Enabled Identity Tokens** document establishes guidelines for the encryption and use of user-enabled IDs—notably email addresses and phone numbers—in scenarios when online publishers or marketers offer personalized content or services tied to a user-provided email or phone number.

IAB and IAB Tech Lab continued the education and awareness campaign for predictable privacy and

responsible and accountable addressability bringing together industry experts via the Addressability Solutions Roadshow and town hall series throughout the year.

Engaging the New Media Consumer with Streaming

TV and video have been reborn in the pandemic as streaming. Brand plans are beginning to start with streaming and using linear to fill in the gaps, not the other way around. The lines of demarcation between “traditional” and “digital” are gone—and it’s now all TV. The streaming wars have only just begun, and video is more dynamic now than ever.

Radio and audio are being reborn too. Podcast ad revenue alone is on track to hit \$2 billion by 2023, powered by innovations like dynamically inserted ads. The IAB Media Center is laser focused on accelerating video and audio adoption in a cross-platform marketplace, quantifying the opportunity for brands and marketers in research like the **Video Ad Spend and Outlook for 2021** and bringing leaders together for marketplaces like the **NewFronts**, the **Podcast Upfronts**, and the **Fall Video Marketplace** that convene buyers and sellers to see and hear the latest opportunities and innovations in premium video and audio content.

Driving the Evolution of Next-Generation Measurement

Personalized advertising, measurement, and attribution are being reborn as our entire industry rockets into a cookieless future. We’ve been talking about re-architecting measurement for two decades and it’s finally time to make it a reality.

To assess the digital advertising ecosystem’s preparedness for the loss of third-party cookies and identifiers, the Programmatic+Data Center commissioned Ipsos to conduct a quantitative study, **IAB State of Data 2021**. The report surfaced significant and actionable insights drawn from a survey of more than 200 data decision-makers within brands, publishers, agencies, and data companies.

Overall, IAB is committed to addressing modern management’s expectation of more accountable marketing and media spend—and the challenges of delivering in a volatile regulatory environment.



Improving Trust and Transparency Across the Ecosystem

The digital advertising industry needs a transparent and safe marketplace for digital advertising and marketing transactions if it is to thrive. Only with the help and dedication of the entire advertising community can we collectively instill confidence in consumers, security in content creators, and better understanding in marketers. To accomplish these ambitious and essential goals, IAB Tech Lab engages a member community globally to develop foundational technology and standards that enable growth and trust in the digital media ecosystem.

There are many tools available, but they don’t matter if they’re not adopted. Launched in 2021, the IAB Tech Lab **Transparency Center** provides a resource that makes it easy for digital advertising participants—buyers, sellers, and ad tech companies—to see which standards media partners have implemented, their level of compliance, certification program results, and more. This will help ensure a safe, privacy-centric ad experience for consumers. The Transparency Center includes **supply chain validation**, a global industry compliance registry, and an advertising system aggregation. The Tech Lab also announced the launch of its **Open Source Initiative** to increase transparency and collaboration across the

advertising community. Housed on **GitHub**, it provides standards implementations that can be directly integrated and tools that can help deploy standards.

Finally, as part of Project Rearc, the Tech Lab also launched the **Accountability Platform** designed to ensure that all digital advertising supply chain participants can consistently show that they are adhering to user preferences.

Propelling Talent Development and the DEI Imperative

As we are experiencing “The Great Resignation,” IAB will be providing sustainable solutions to address the industry’s talent crisis and development needs. It’s critical for IAB to address the industry talent crisis and to proactively continue to advocate for diversity, equity, and inclusion (DEI) in the workplace. The **Talent Development Council** is designed to help IAB members connect with colleagues at peer organizations, onboard new employees efficiently, create DEI programs that perform, and hire, train, and recruit in a hybrid environment.

IAB’s **Digital 360 Suite** and Industry Knowledge courses are available for members to purchase on-demand or license to package into their own learning management system to retain and upskill their talent. And IAB has recruited companies to sign up for the first nationwide **IAB Accelerate: Digital Media Apprenticeship** in partnership with American Apprenticeships Work (AAW) that will launch in 2022 to address diversity in the workforce across the industry.

As you can see, our list of challenges and accomplishments in 2021 was extensive. And our ambitions for 2022 are even more aggressive.

Yes, the legislative landscape continues to be ominous, and our industry is in the crosshairs for intense regulation and reform. 2022 will be a year of profound change, risk, and opportunity, and what we do next year will shape the next 10 years.

But working together, we will prevail—and clear the way for brands to connect with audiences and thrive.

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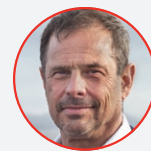
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third love

Accelerating Video and Audio Adoption in a Cross-Platform Marketplace

We saw nearly every assumption about audio and video challenged in 2021 as new streaming services and platforms, omnichannel behaviors, privacy, and e-commerce imperatives shifted the landscape. Digital video now represents more than half (56%) of the total video spend and connected TV (CTV) saw its highest gains to date in ad spend with 22% growth year-over-year. In addition, no fewer than five major streaming services were launched in 2021. Adults now spend an average of 140 minutes of digital video per day, up from 133 minutes in 2020, and household adoption of CTV is now at 83% (up from 76% in 2019). Addressing this new landscape, the IAB Media Center is focused on the fast-changing video and audio habits of today's consumers.

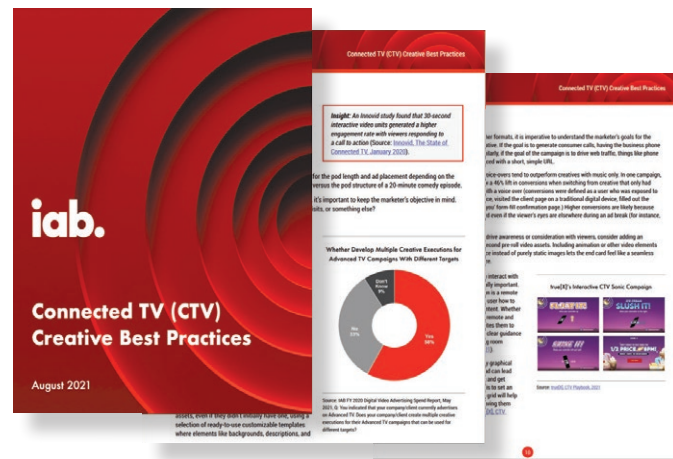
Key areas of focus for the Media Center include:

- Propelling adoption of digital video, advanced TV, CTV, and audio through education and adoption of standards and best practices
- Maximizing the speed with which the industry advances by packaging and communicating technical video/audio standards in business terms
- Reducing marketplace friction through shared terms and conditions and education in measurement with guidance on how to measure, plan, and evaluate campaigns using cross-platform video/audio
- Developing advocacy for the value of news, quality publishing, and long-term investment along with practical advice to ensure brand safety and suitability

Key accomplishments of the Media Center in 2021 were focused around three campaigns: **Tele://Vision**, **Audio Everywhere**, and **News Saves Lives**.

Living the Stream: Tele://Vision

The last two years have accelerated the rise of streaming, making it even more crucial that the entire ecosystem change how video is bought, sold, measured, and optimized.



While expectations for year-over-year growth in digital video have become the norm, there are nuances beneath the big numbers that point to how seismic shifts—from new viewing behaviors and launches of streaming platforms, and the ongoing migration of \$70 billion in linear TV spend—are happening across multiple platforms and how the growth of CTV is increasingly becoming an omni-media story. To help members make sense of the changes required, IAB released the **Video Ad Spend and Outlook for 2021** before NewFronts. The report provides a lens to the trends in this marketplace, with guidance for brands, buyers, and sellers on how they can position and differentiate their video offerings based on where the money is moving and how planning, measurement, and creative are evolving to support brand engagement with consumers.

Connected TV (CTV) is largely responsible for digital video's resilience in 2021 thanks to strong consumer demand for streaming digital content.

“Buyers are not only following consumer attention, they are flocking to CTV. It is the perfect marriage of high-quality content, superior targeting, in-market optimization, and robust measurement.”

— DAVID COHEN, CEO, IAB

As personalization becomes increasingly challenged in this more privacy-focused era, the need for creative that both performs and scales across platforms has never been more important. The **CTV Creative Best Practices Guide** released in August examines the current state of creative, identified where the challenges are, and denotes where the industry is coalescing in terms of creative strategy and scalable formats. Connected TV represents an entirely new platform with new content capabilities, creative formats, and audiences with new expectations. To help members understand this new medium, the Tech Lab released a **programmatic guide to CTV** which includes a set of use cases for preparing assets, responding to an ad request, mitigating ad fraud, and enabling targeting.



IAB: Per-Advertiser CTV Spend Leapt 22% In 2020, 35% Expect To Increase CTV This Year

Following the NewFronts in May, IAB heard from many brands and agencies about the need to engage more frequently with the marketplace. **The Fall Video Marketplace** in September brought together buyers and sellers to see and hear about the latest opportunities and innovations in premium video content, garner

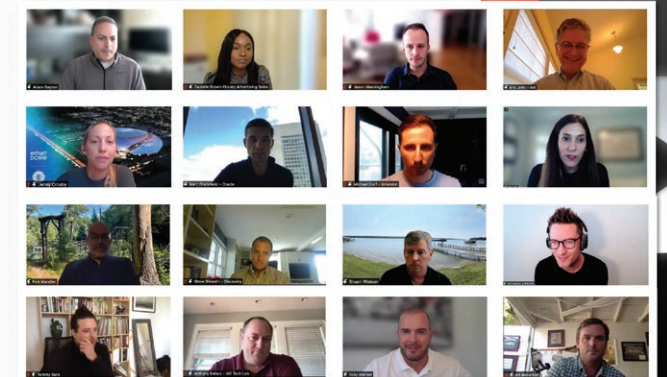
insights, and discover solutions with an eye toward incremental opportunities. Key themes included the explosion of streaming platforms and OTT, the diverse audience opportunities of these new platforms, the need to recalibrate attribution models with the widespread adoption of omnichannel strategies, and measurement and attribution challenges in a multi-touch world.



Connected TV Was Biggest Advertising Winner In Digital Video In 2020: IAB

These themes were also part of the sixth annual **IAB Video Leadership Summit** in October where more than 100 senior industry stakeholders gathered across marketing, media, agency, and technology industries to generate actionable ideas to reduce friction and collaborate on growth opportunities in the increasingly omnichannel video landscape. The momentum continued into December when leaders of the Advanced TV and Digital Video Committees convened to discuss the state of local advertising in the converging TV-digital landscape. The discussion included trends for monetizing local inventory, how particular verticals are tapping the opportunity for audience-addressable media, and how buyers and sellers are responding to challenges in local supply chains.

Video Leadership Summit:
“Identity and Audience in Flux”



2021 IAB Digital Video Center Board

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| Maggie Zhang, <i>Amazon</i> | Danielle Brown, <i>Disney Media & Entertainment</i> | Jay Prasad, <i>LiveRamp</i> | Shelby Saville, <i>Spark Foundry (Publicis Media)</i> |
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| HeeKyu Kim, <i>Bank of America</i> | Brian Albert, <i>Google / YouTube</i> | Marla Newman, <i>Meredith</i> | Laurel Rossi, <i>true[X]</i> |
| Michael Law, <i>Carat</i> | Adam Gerber, <i>GroupM</i> | Beau Avril, <i>Meta / Facebook</i> | Jo Kinsella, <i>TVSquared</i> |
| Erika Newsom, <i>Camelot</i> | Susan Schiekofer, <i>GroupM</i> | Mike Reidy, <i>NBCU</i> | Stephanie Prager, <i>Twitter</i> |
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| Pooja Midha, <i>Comcast Advertising</i> | Tal Chalozin, <i>Innovid</i> | Marc Grabowski, <i>Oracle</i> | Kevin McGurn, <i>VEVO</i> |
| Cara Lewis, <i>Dentsu at Amplifi USA</i> | Jessica Hogue, <i>Innovid</i> | Jeff Hagen, <i>Papa John's Pizza</i> | Steven Ellis, <i>ViacomCBS</i> |
| | Tony Marlow, <i>Integral Ad Science</i> | John Vilade, <i>Premion</i> | Jodie McAfee, <i>Vizio</i> |
| | | Meryl Draper, <i>Quirk Creative</i> | Jim Cowsert, <i>Voya Financial</i> |
| | | Michael Scott, <i>Samsung</i> | |

Audio Everywhere

One out of every 2.4 adults in the U.S. now listens to a podcast every month and media buyers have recognized the opportunity to connect with these fast-growing and highly engaged audiences for both branding and performance, tapping into the intimate relationship podcast creators and hosts have with their listeners.

According to the IAB **Podcast Revenue Report** released in May, podcast advertising is expected to grow as much over the next two years as it has over the last decade, topping \$1 billion in 2021 with expectations to reach \$2.2 billion by 2023. Now in its fifth year, the report serves as the industry benchmark for annual revenue while also highlighting new creative trends and monetization opportunities in terms of ad categories, ad type, and content genres.

To bring together podcast leaders, media planners, and advertisers, the IAB **2021 Spring Podcast Upfront** titled "Listen Up," gave brands and agencies exclusive access to the year's most exciting releases, previews of creative opportunities, and insights that will define the podcast landscape for the next 12 months. In addition to many veteran presenters, IAB also featured "showcase" presentations from a wide range of diverse and up-and-coming publishers whose content is accelerating audience growth. IAB also launched the first-ever **Fall Podcast Upfront** in September which offered a timely update on publisher content offerings and a view of late-breaking solutions and innovations in time for the fourth quarter.

DEADLINE

Podcast Ad Revenue To Hit \$2B By 2023, Says IAB

The State of Podcast Measurement



Juleyka Lantigua
CEO and Founder
LWC Studios



Jen Soch
Executive Director,
Specialty Channels
GroupM



Bryan Barletta
Founder
Sounds Profitable

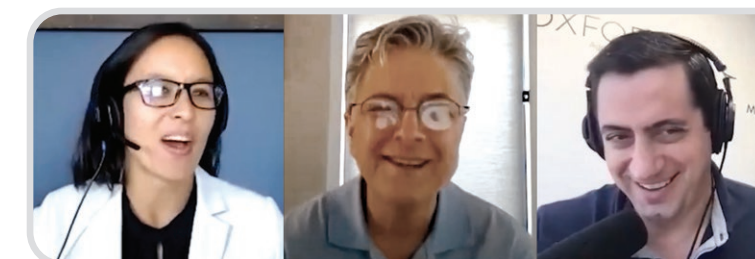


Eric John
VP, Media Center
IAB

While podcasting as a medium is flourishing, challenges endure in getting a commonly agreed-upon set of metrics in the podcasting space. To help set the stage for the Audio Committee's current focus on measurement, IAB hosted a series of virtual panels entitled "Moving the Measurement Needle Forward" to discuss what is needed to support increased brand and buyer investment in the medium in 2022 and beyond.

Brand Safety and Suitability: News Saves Lives

News has always played a critical role in the lives of consumers as the events of January 6 and the pandemic have laid bare. At NewFronts, on the heels of World Press Freedom Day, IAB featured a discussion called "Real News, Real Brands, Real Trust: The Marketer's Perspective" that examined the critical importance of objective, quality journalism, and how it also benefits the brands that support it.



Vanessa Otero, Chief Executive Officer, Ad Fontes Media; Dan Granger, Founder and CEO, Oxford Road; Eric John, Vice President, Media Center, IAB; 2021 IAB There: The Impact of Brands on Misinformation and Bias in the News Ecosystem

In a brand safety and news-focused session of IAB There (the IAB talk show featuring IAB subject matter experts and guests), IAB's Vice President of the Media Center, Eric John spoke to Vanessa Otero of Ad Fontes and Dan Granger of Oxford Road. They discussed IAB's **News Trust Halo research**, the state of accuracy

and bias in news media, and how brand safety within news and podcasts is unique. The session also addressed what brands do to

protect the future of the digital news industry and the latest **brand safety tools from IAB Tech Lab**.



Gina Garrubbo, President and CEO, National Public Media; Tom Webster, Senior Vice President, Edison Research; Lauren Russo, Executive Vice President, Managing Partner, Innovation & Performance Audio, and DEI Impact Team Leader, Horizon Media; 2021 IAB Annual Leadership Meeting

- | | |
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| Anne Frisbie, <i>Adswizz</i> | Jen Soch, <i>GroupM</i> |
| Anuj Chadha, <i>Amazon Advertising</i> | Lauren Russo, <i>Horizon Media</i> |
| Ken Lagana, <i>Audacy</i> | Carter Brokaw, <i>iHeart Media</i> |
| Chris Snyder, <i>Cox Communications</i> | Kathy Doyle, <i>Magna</i> |

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| Mark McCrery, <i>Podtrac</i> | |

Programmatic+Data Center Data-Driven Marketing Transformation

With the impending loss of third-party cookies and other identifiers, IAB wants to ensure brands and publishers preserve the ability to communicate effectively with their customers. The Programmatic+Data Center is dedicated to defining boundaries, reducing friction, and increasing value along the data chain for consumers, marketers, and the ecosystem that supports them. The main goals of the Programmatic+Data Center are to:

- Drive accelerated digital marketing transformation through emerging technologies
- Advance programmatic growth while supporting media buying for emerging formats
- Lead industry consumer privacy and ethics initiatives
- Define data transparency, quality, and identity to inform measurement and attribution within the supply chain



Joey Trotz, Global Head of Ad Technology, IBM Watson Advertising & The Weather Company; **Orchid Richardson**, Senior Vice President, Programmatic+Data Center, IAB; **Cara Pratt**, Senior Vice President, Commercial & Product Strategy, Kroger Precision Marketing; **Deanna Pagano**, Director, Marketing Technology & Analytics, TD Ameritrade; **2021 IAB Audience Connect: Power of First Party Data**

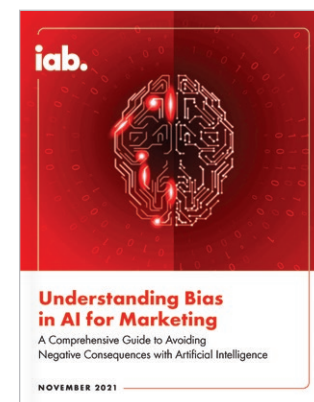
Key accomplishments of the Programmatic+Data Center in 2021 were focused around three campaigns: **The Future of Addressability, The Measurement Imperative, and Privacy Now.**

AdAge | **Publishers Risk Losing \$10 Billion Thanks to Cookie Cuts, and Brands Are Not Ready for Data Changes, IAB Says**

The Future of Addressability

To assess the digital advertising ecosystem's preparedness for the imminent loss of third-party cookies and identifiers, the Programmatic+Data Center commissioned Ipsos to conduct a quantitative study called the **IAB State of Data 2021**. The report surfaced significant and actionable insights drawn from a survey of more than 200 data decision-makers within brands, publishers, ad tech, agencies, and data companies. IAB also partnered with McKinsey to conduct a qualitative study that interviewed nearly 30 key data leaders from brands, publishers, and agencies, as well as advertising technology and data companies to better understand how companies will adapt and address the loss of third-party cookies and identifiers. As an extension of the research, a State of Data town hall series explored key findings of the research and addressed identity and addressability, the future of contextual, and measurement.

Data is also the lifeblood of artificial intelligence, and AI and machine learning (ML) are now an essential part of a modern marketer's toolkit. Already used for audience and product development, creative testing, and measurement, AI is expanding into creative planning, compliance, and privacy, as well as identity management in a post-cookie world.



Released in March, the **Artificial Intelligence Use Cases and Best Practices for Marketing** guide includes nine use cases spanning internal robotic process automation and data migration for agencies and brand marketers to AI use cases for creative, contextual, video, and more. This was followed by an in-depth guide to **Understanding Bias in AI for Marketing**.

Finally, to improve transparency and the quality of data, the Measurement Maps Working Group is mapping the key elements that drive **video measurement metrics** to simplify vexing video measurement questions and standardize the grouping and classification of data to align the industry on terminology, nomenclature, definitions, and data formats.

The Measurement Imperative

IAB is committed to addressing modern management's expectation of more accountable marketing and media spend.

“ With the end of browser cookie support, what will happen to measurement and attribution? ”

To discuss the latest consumer-first, privacy-by-design addressable solutions for advertisers and publishers in preparation for a post-cookie world, IAB also hosted **Audience Connect** which brought together the most influential voices in data, addressability, and privacy. In the same vein, the **Identity Solutions Town Halls** were devoted to keeping the advertising community educated and informed on various approaches to leveraging first-party data to connect and build trust with their customers.

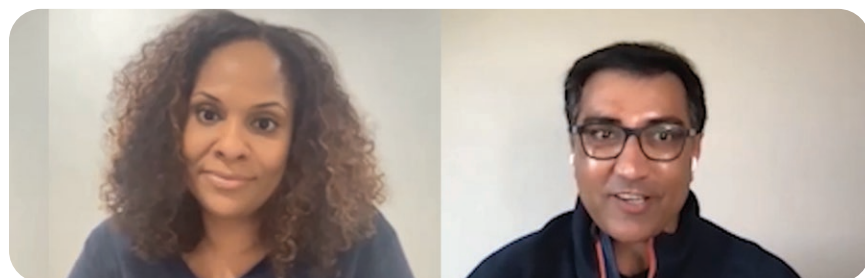


IAB Artificial Intelligence Group To Build Standards, With Focus On AI, Machine Learning, Bias



David Olesnevich, Head of Product, IBM Watson Advertising; **Angelina Eng**, Vice President, Measurement & Attribution, IAB; **Cathy Mulrow-Peatty**, Of Counsel, Loeb & Loeb; **Troy Cunningham**, Head of Information Security, IPONWEB; **2021 IAB New Rules for Digital Media Town Hall**

The Programmatic+Data Center continues to educate the ecosystem on the business impact of the changes in privacy, addressability, and measurement. In a series of town halls during October, November, and December called the **New Rules for Digital Media**, IAB convened the industry to provide guidance and insights for **privacy, trust, and transparency; addressability and first-party data; and addressability and measurement**. In December the Programmatic+Data Center also launched the **Browser/OS Ads Testing Task Force** to gather thought leaders and industry experts to strategize new approaches to emerging forms of addressability, crowdsource implementation ideas for browser/operating system-based proposals, share aggregate results, successes, and failures in early testing, and build consensus for collective feedback to browsers and other platforms rolling out new forms of addressability.



Orchid Richardson, Senior Vice President, Programmatic+Data Center, IAB; **Varun Bhagwan**, Vice President, Product Management & Engineering, Ads Data, Yahoo (formerly Verizon Media); **2021 IAB There: Navigating Identity and Consumer Privacy Headwinds**

Privacy Now

The proliferation of new privacy regulations in the U.S. and around the world is profoundly affecting the way businesses can operate. IAB and the Tech Lab provide legal, policy, and technical compliance frameworks to help advertisers and marketers find new ways to operate their business, address their customers with personalized messaging, and comply with local and global legislation.

Learn more about various projects from the IAB’s Legal Affairs Council—such as the **Cross-Jurisdiction Privacy Project (CJPP) Compendium**, titled “Privacy Laws & Digital Advertising: Multi-jurisdictional Overview and Implications,” which examines privacy laws of 11 countries, and **Project Crosswalk: Addressing CCPA Compliance within the CTV/OTT Marketplace**—in our **Public Policy & Legal section**.

IAB State of Data Initiative

The **IAB State of Data** two-part study provided insights on how the industry can collectively fine-tune and heighten tactics to prepare for and navigate the demise of third-party cookies and identifiers:

- **Assessing Perceived vs. Actual Preparedness for the Post Third-Party Cookie and Identifier Tracking Ecosystem** (a quantitative study conducted for IAB by Ipsos)
- **The Demise of Third-Party Cookies and Identifiers** (a qualitative study that interviews industry leaders conducted by McKinsey)

This timely research also offers actionable advice to help members decide how to conduct, measure, and optimize advertising campaigns in the years ahead.

2021 IAB Programmatic+Data Center Board

- | | | | |
|----------------------------------------------------|--------------------------------------------------|------------------------------------------------|----------------------------------------|
| Cara Pratt , 8451 | Dana Tunks , BroadSign | Joey Trotz , IBM Watson Advertising | Jim Habig , Pinterest |
| Kurt Fulepp , AccuWeather | William Rodriguez , Customer ID | Shalin Dahr , Method Media Intelligence | Brenda Tuohig , The Trade Desk |
| Chad Engalgau , Acxiom | Aimee Irwin , Experian Marketing Services | Kyle Maurer , Monster Energy | Jorge Ruiz , TikTok |
| Erik Seide , Bank of America | Dan Taylor , Google | Michael Schoen , Neustar | Justin Antonipillai , WireWheel |
| Keith Bryan , Best Buy Retail Media Network | Phil Schraeder , GumGum | Mainak Mazumdar , Nielsen | |

Engaging New Media Consumers in a World of Brand Disruption

The last two years have forever changed the way consumers engage with digital media. To navigate this new world, the Experience Center focuses on emerging platforms and evolving consumer behaviors to help the industry understand and reach the new media consumer. The Experience Center is governed by a flagship Experience Center Board and Marketplace Boards.

Key accomplishments of the Experience Center in 2021 were focused around the following campaigns: **Brand Disruption** and the **New Media Consumer**.

Brand Disruption

The pandemic has accelerated what was already starting to happen: Consumers have irrevocably changed where and how they shop.

To better understand this evolving landscape, IAB collaborated with The Harris Poll to create proprietary research around the **Future of Commerce and Media Consumption**. Following that research, IAB hosted the **Future of Commerce Brand Salon** for brand marketers, an intimate and interactive discussion with brands on evolving consumer shopping behaviors and post-COVID



Randall Rothenberg, Executive Chair, IAB; **Kara Goldin**, Founder and Chief Executive Officer, Hint, Inc; **2021 IAB Brand Disruption Summit**

- Future proofing and how to reach the audiences of tomorrow
- Innovation-focused buy and sell-side conversations
- Big picture discussions about the implications of technological and consumer shifts for the digital media industry



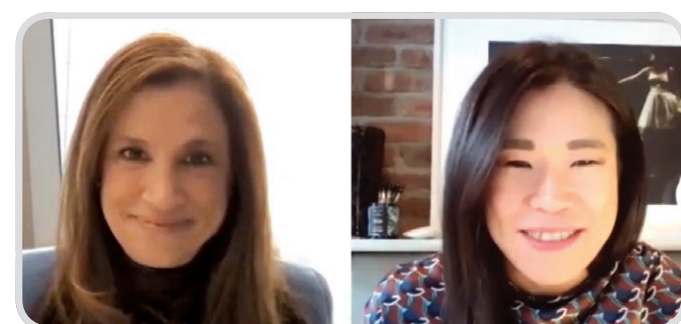
2021 IAB Experience Center Flagship Board

- | | | | |
|-----------------------------------------|-----------------------------------------|--------------------------------------|----------------------------------------------------|
| Adam Buhler , Digitas | Sheila Schultz , Microsoft | Paulina Klimenko , Pubmatic | Sheri Bachstein , The Weather Company (IBM) |
| Keith Soljacich , Digitas | Erin Schaefer , Niantic | Katie Spagnuolo , TripAdvisor | Tony Gemma , Yahoo |
| Chris LaSala , Google | Don Buckley , Open Voice Network | Tony Parisi , Unity | |
| Christy Cooper , Meta / Facebook | | Michael Dorf , Univision | |

2021 IAB Augmented Reality (AR) Marketplace Board

- | | | | |
|--------------------------------|--------------------------------|--------------------------|-----------------------------|
| Tom Emrich, 8th Wall | Ipshita Biswas, Google | Hareesh Achi, NexTech AR | Jeff Miller, Snap |
| Jonathan Frohlinger, Big Happy | Rachel Weiss, L'Oréal | Erin Schaefer, Niantic | Andrew Klein, Spark Foundry |
| Keith Soljacich, Digitas | Catherine Henry, Media Monks | Stan Joosten, P&G | Jason Yim, Trigger |
| Lucy Jin, Google | Chris Barbour, Meta / Facebook | Kendy Lau, Sephora | Tony Parisi, Unity |
| | | Lauren Miyake, Sephora | Tony Gemma, Verizon |

media consumption habits, and a **Gen Z Brand Salon**, an intimate and interactive discussion featuring an exclusive presentation from Pew research followed by case studies from platforms that have been especially successful with Gen Z.



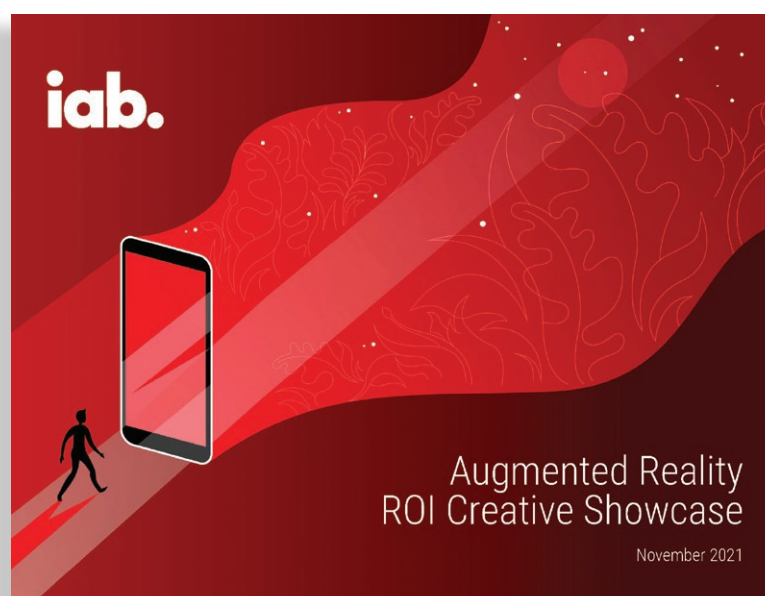
Nada Stirratt, Vice President, North America, Meta / Facebook; **Zoe Soon**, Vice President, Experience Center, IAB; **2021 There: IAB Getting Started in the Metaverse**

To make sense of the snowballing effect of changes in digital consumers, digital supply chain management, digital distribution, digital selling, and digital marketing, the **Brand Disruption Summit** (now in its fourth year) brought together executives from the world's most innovative companies to discuss proven growth strategies for the modern brand. IAB also released the **2022 Brand Disruption Report**, which highlights the acceleration of the storeless economy, the growth of retail media networks, changes in delivery times, big brands adopting the direct-to-consumer (DTC) playbook, and more shifts driven by the DTC economy.

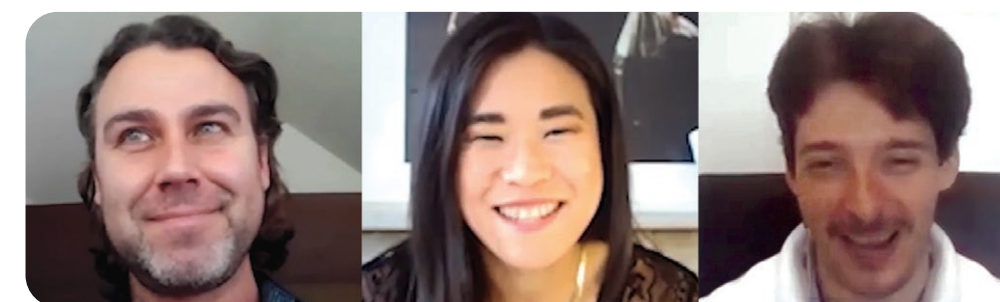
New Media Consumer

IAB is committed to examining the changes—big and small—in what consumers want and need from the media. What experiences will drive loyalty and growth? How must the media reinvent itself for the future?

Part of that reinvention includes augmented reality. Early in 2021, IAB released the **AR Buyer's Guide**, a new where-what-how guide that demystifies augmented reality (AR) for marketers, including where to start and how much budget to allocate. It was written for mid to senior-level marketers by AR companies including Meta / Facebook, Google, Snap, TikTok, Unity, and Verizon Media (now Yahoo). IAB also released the **Augmented Reality ROI Creative Showcase** using creative examples to demonstrate that AR can deliver strong ROI across the marketing funnel and to inspire



Casey Campbell, Managing Director, North America, Gameloft for brands; **Zoe Soon**, Vice President, Experience Center, IAB; **Quentin Moreau-Defarges**, Head of Creative Strategy, Gameloft for brands; **2021 IAB There: Building Deeper Connections Through Gamified-Brand Applications & New Technologies**



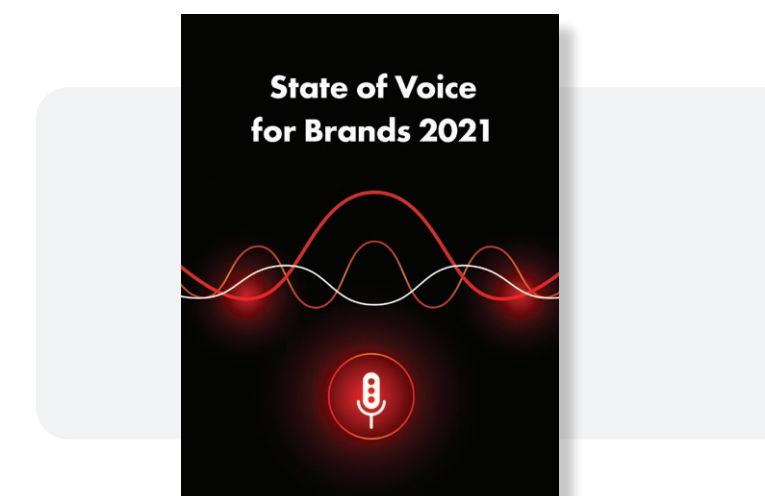
brands to use AR through demonstrable results. Finally, IAB also launched an Augmented Reality (AR) Marketplace Board within the Experience Center to scale AR advertising through standards as well as increased brand awareness and investment.

AdAge | **Voice Technology for Brands: 2 Trends Accelerating the Evolution**

Gaming is increasingly becoming a destination for entertainment, shopping, and social connection for consumers. IAB formed a Games and Esports Board within the Experience Center to help the industry unlock the power of this channel to reach audiences. The Games and Esports Board then partnered with the IAB UK games group to re-architect a **common taxonomy for advertising** in the space.

The artificial intelligence (AI) that powers voice in marketing has also been rapidly evolving, so the Experience Center formed a working group of unrivaled

expertise to make sense of the current landscape. From the latest smart speaker capabilities to synthetic voice, the **State of Voice for Brands 2021** report is a comprehensive guide for marketers to harness this nascent but essential technology today. On the heels of the report's release, IAB also held a virtual event for brands on the topic with guest speakers from the working group and debuted "IAB News" voice functionality for both Alexa and Google Assistant.



2021 IAB Games and Esports Marketplace Board

- | | | | |
|---------------------------------------------------|----------------------------------|---------------------------------------|---------------------------------|
| Jonathan Stringfield , Activision Blizzard | Tommy Huthansel , Dentsu | Leslie Petry , Meta / Facebook | Bill Young , Twitch |
| Marty Berman , Admix | Sarah Stringer , Dentsu | Jay Schiller , Microsoft | Agatha Hood , Unity |
| Itamar Bennedy , Anzu | Cary Tilds , Frameplay | Brian Benedik , Niantic | Mike Sepso , Vindex |
| Sean Crawford , Bidstack | Casey Campbell , Gameloft | Ian Owen-Ward , Thec | Gabrielle Heyman , Zynga |
| Dan Holland , Dentsu | Walt Gao , Google | Joel LaMontagne , Trivver | |

Meeting the Consumer Privacy and Compliance Challenges in a Changing Ecosystem

The digital advertising industry is in the process of becoming a regulated industry, as laws inspired by the General Data Protection Regulation (GDPR)—each with their own goals and nuances—expand across the globe. To guide IAB members, the IAB Legal Affairs and Public Policy Councils tackled key challenges IAB members confronted in 2021:

Cross-Jurisdiction Privacy Project

As the open internet continues to increase the availability of ad-supported digital media around the world, IAB members have had to keep pace with increasingly complex international privacy requirements. To assist members in meeting this growing challenge,

the IAB’s Legal Affairs Council launched the **Cross-Jurisdiction Privacy Project (CJPP)** in August of 2020 to explore how the privacy laws of Australia, Brazil, Canada, China, India, Israel, Japan, Mexico, Nigeria, Singapore, and South Korea apply to the digital advertising industry. Through 2020 and the first half of 2021, more than 150 lawyers

from across the globe participated in this project. CJPP contributors included subject-matter experts in digital media from IAB member companies and partner law firms, as well specialist privacy counsel in each of the 11 jurisdictions covered by the CJPP.

The results of the CJPP are impressive. Working across borders, CJPP contributors developed a 500+



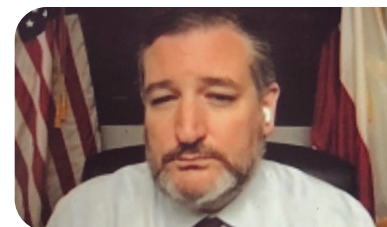
Amy Klobuchar, U.S. Senator (D-MN); Dave Grimaldi, Former Executive Vice President, Public Policy, IAB; 2021 IAB Washington D.C. Virtual Fly In

page compendium that documents the nuances of local privacy laws and surfaces how they compare to each other, with a tight focus on application to digital advertising.



Ron Wyden, U.S. Senator (D-OR) Chair, U.S. Senate Finance Committee; 2021 IAB Annual Leadership Meeting

Ted Cruz, U.S. Senator (R-TX) Chair, U.S. Senate Finance Committee; 2021 IAB Washington D.C. Virtual Fly In



Daniel Goldberg, Chair of the Privacy and Data Security Group, Frankfurt Kunitz Klein & Selz PC; Ami Rodrigues, Assistant General Counsel/Data Protection Officer, Chipotle Mexican Grill; Veronica Torres, Former Chief Privacy Officer, Comscore; Jurgen Van Staden, Senior Counsel, Global Privacy and Regulatory Affairs, ByteDance Inc; Michael Hahn, Senior Vice President, General Counsel, IAB and IAB Tech Lab; 2021 IAB Public Policy & Legal Summit: Preparing for New State Privacy Laws in 2023: CPRA, VCPA, and CPA



James Clyburn, U.S. House Majority Whip (D-SC 6th District); 2021 IAB ALM | DC’s Reset: What to Expect When You’re Expecting a New Administration

State Compliance Working Group

The IAB Legal Affairs Council amended and improved the **IAB Limited Service Provider Agreement (LSPA)** to provide a clearer way for California consumers to opt out of the resale of their personal information by signatories, and to make it easier for signatories to process deletion requests consistent with the law. LSPA signatories have grown from approximately 600 to 850 companies during 2021.

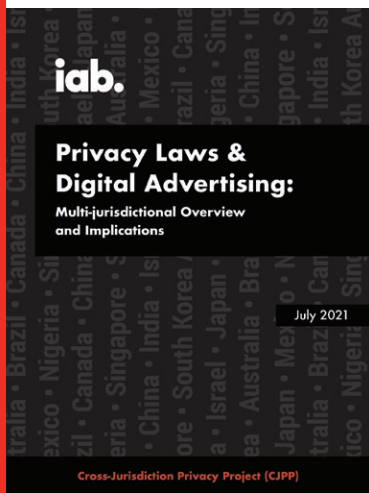
The working group also closely monitored the advent of Global Privacy Control (GPC), which was written into the CCPA regulations. Then-Attorney General Xavier Becerra pushed the draft GPC specification forward by publicly tweeting support for it and undertook enforcement actions against companies that failed to respond appropriately to the GPC signal. To assist IAB members in keeping pace with and understanding these developments, the Legal Affairs Council released a **Global Privacy Controls white paper** in August.

The working group is presently focused on preparing for new privacy requirements in California, as well as new privacy laws in Virginia and Colorado. IAB is analyzing how these laws apply to different data flows and will make corresponding changes to the IAB Limited Service Provider Agreement, and propose changes to the U.S. Privacy String.

AdAge

Opinion: A Call for National Privacy Legislation

Further, the CJPP distilled key results from the Compendium into a **Legal Specifications Chart**. The chart presents a structured comparison of (1) transparency requirements and (2) available legal bases for processing for specified digital advertising activities. This chart is the foundation for the IAB Tech Lab’s continued efforts to develop specifications for a **Global Privacy Platform (GPP)**. In turn, the GPP is expected to provide a framework that enables participants to communicate how they are complying with privacy requirements around the globe. The chart also serves as a companion reference to the compendium for privacy professionals to compare certain requirements for digital advertising.



DIGIDAY

**Future of TV Briefing:
Connected TV has a consent
management challenge**

Project Crosswalk

Project Crosswalk made great strides in 2021. The working group, comprised of legal representatives from members across the connected TV (CTV) and over-the-top video (OTT) industry, met regularly, conferring on the state of data flows and privacy compliance efforts taken in response to the California Consumer Privacy Act (CCPA). Those efforts culminated in November when IAB released its white paper entitled, **Project Crosswalk: Addressing CCPA Compliance within the CTV/OTT Marketplace**. The white paper examined stakeholders within the CTV/OTT marketplace, how

participants disclose and process personal information, how they view themselves when applying the CCPA definitions and corresponding compliance obligations,

whether and what friction points exist when addressing CCPA compliance, and potential solutions deserving further exploration. Leveraging the insights gained from this effort, IAB is working with members to develop industry norms and solutions to help CTV and OTT companies respond to new privacy laws.

Dennis Buchheim, Vice President, Advertising Ecosystem, Meta / Facebook;
Brad Weltman, Director, Privacy & Public Policy, Meta / Facebook; **2021 IAB Policy & Legal Summit**

Lauren Culbertson, Head of U.S. Public Policy, Twitter; **2021 IAB Policy & Legal Summit**



Virginia's Consumer Data Protection Act and the Impact on Digital Advertising

IAB's Legal Affairs Council conducted a webinar on **Virginia's Consumer Data Protection Act** which featured lawyers from Davis & Gilbert, The Trade Desk, Ziff Davis, and IAB's General Counsel. The panel provided an overview of the law and discussed the impact on the industry, as well as offered their insights on practical compliance solutions going forward.

ADWEEK

Virginia Passes Data Privacy Law, Reigniting Calls for a Federal Solution

Blake Brannon, Chief Strategy Officer, OneTrust; **2021 IAB Policy & Legal Summit**



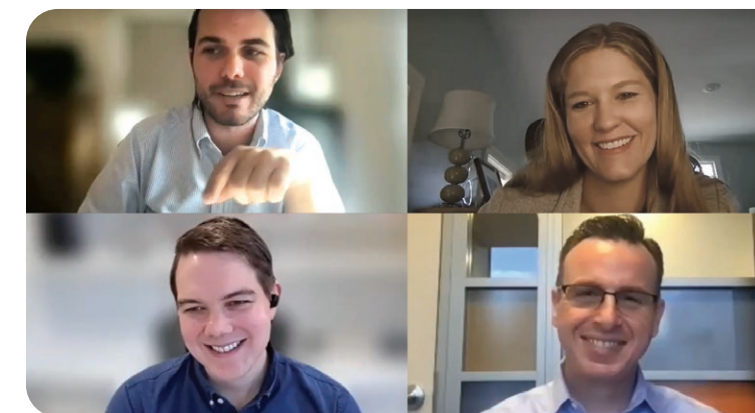
Policy & Legal Summit

The **2021 IAB Policy Summit** brought together leaders in media, technology, and government from across the



Ghita Harris-Newton, Director, Government Affairs, Public Policy, Ads and Commerce, Google; **2021 IAB Policy & Legal Summit**

U.S. to debate the most significant challenges facing the industry today. This virtual summit examined the post-election implications for the industry and discussed solutions that enable a sustainable and consumer-centric media and marketing ecosystem in a rapidly changing commercial and political environment. Key topics in 2021 included the importance of building trust in today's



Alex Cone, Vice President, Privacy and Data Protection, IAB Tech Lab; **Stephanie Hanson**, Offering Manager, OneTrust; **Grant Nelson**, Product Manager, Privacy, TripleLift; **Brandon Seltenrich**, Vice President, Privacy, ViacomCBS; **2021 IAB Policy & Legal Summit**

evolving digital landscape, preparing for new privacy laws in 2023 (there are many coming), and making technical sense out of a patchwork of privacy regulation.

The Economic Impact of the Market-Making Internet

A new study commissioned by the IAB and led by Dr. John Deighton, a researcher from Harvard Business School, found that the internet economy grew seven times faster than the total U.S. economy during the past four years, and now accounts for 12 percent of the U.S. gross domestic product (GDP). The study also discovered that more than 17 million jobs in the U.S. were generated by the commercial internet, 7 million

more than four years ago. The report is a powerful affirmation of the incredible industry we work in and the impact it has on our lives.

The Economic Impact of the Market-Making Internet Webinar: Harnessing the Power of Digital for Growth & Innovation Panel



<p>Sarah Farzam Founder and CEO Bilingual Birdies @BilingualBirdie</p>	<p>Teri Johnson Founder and CEO Harlem Candle Company @HarlemCandles</p>	<p>Emily Onkey Co-Founder and CMO Aplós @EmilyO_in_NYC</p>
<p>Moderated by: David Cohen, Chief Executive Officer IAB</p>		

Developing Talent and Diversity to Accelerate Growth

The world is experiencing an economic, health, and societal crisis that profoundly affects the entire interactive industry and limits the growth of the industry. IAB member companies and industry partners can lead by example—by creating and standing behind principles, best practices, and programs to build and nurture diverse, inclusive, and equitable workplaces, and IAB is a logical source to help drive needed change forward.

Diversity, Equity, and Inclusion

IAB provided access to training to diverse student groups through key partnerships in 2021, and to professionals impacted by the pandemic. IAB also gave students access to IAB tentpole events such as the IAB Newfronts, Podcast Upfronts, and Brand Disruption Summit so that they can get a better sense of our industry.



Michelle Savoy, Senior Vice President, Digital Ad Sales, Univision Communications Inc.; **Sheryl Goldstein**, Executive Vice President, Member Engagement & Development, IAB; **Aneessa Steilen**, Vice President, Media & Distribution Marketing, Vevo; **Chardia Christophe-Garcia**, Executive Director, Audience and Community Marketing, Forbes; **2021 IAB Fall Marketplace: The Future of DEI and How Brands Can Open Minds, Shape Decisions, and Offer Solutions**

Alvin Bowles, Vice President, Business Engineering & Partner Solutions, Meta / Facebook; **IAB There: How DEI Is Transforming Ad Tech for the Better**



IAB experts held conversations around diversity, equity, and inclusion (DEI) at various events, including The TV Squared podcast, 212NYC: Race Relations in the Advertising Industry Panel, The MAKERS Board, and Google's cross-industry discussions.

MARTECH SERIES | **IAB Expands Diversity, Equity, Inclusion Initiatives with Launch of First Digital Media Apprenticeship Program**

IAB also launched the **IAB Inclusion Institute** and created three sub-committees. The **Community & Engagement Committee** creates programs centered around student outreach, readiness and pipeline programs, better diversity recruitment, communication tactics, and mentoring. The **Workforce and Workplace Committee** develops programs and initiatives to help build cultures of inclusion that support employees, ultimately driving engagement and creating high-performance teams. And with the **Apprenticeship Program**, IAB has partnered with American Apprenticeships Works (AAW) to create the **first-ever apprenticeship program** for the digital media ecosystem. As **more than half of Americans** anticipate looking for a new job over the next 12 months and companies continue to struggle to recruit and retain employees, IAB is proactively creating industry-wide solutions to help organizations with their talent needs.

Talent Development

People are at the heart of our industry, and they need the right tools to succeed. In 2021, IAB continued to build industry knowledge, upskill people, and create solutions that support organizations' talent needs. IAB strives to provide essential industry skills and knowledge and be the go-to industry resource for professional development—and to proactively advocate for DEI in the workplace across our industry. Key programs from 2021 include:

Talent Development Council

Designed to help our members connect with colleagues at peer organizations, onboard new employees efficiently, create DEI programs that perform, and hire, train, and recruit in a hybrid environment, the Council connects learning & development, DEI, and talent development leaders across the digital media ecosystem.

Student Initiatives

The IAB Inclusion Institute launched **Career Days** for students to learn from industry professionals and a **Student Career Bootcamp** to set students up for success in the job search as they enter the industry.

IAB Certifications

The new IAB certification portal was launched in May in partnership with PTI to deliver certification programs. Joint ownership of IAB Certification has helped streamline certification offerings and provides IAB with more support when it comes to servicing and marketing. This will also provide the opportunity for IAB to focus on building exam prep content and offering enterprise deals with a facilitation component.

Licensing IAB E-Learning Courses

IAB offered **Digital 360 Suite** and **Industry Knowledge** e-courses for members to license and package into their own learning management system to retain and upskill talent.

Monique Nelson, Chair and Chief Executive Officer, UWG; **2021 NewFronts Morning Show & DEI Discourse**



IAB Accelerate: Digital Media Apprenticeship

IAB recruited companies to sign up for the first nationwide **Digital Media Apprenticeship** in partnership with American Apprenticeships Work (AAW) that will launch in 2022 to address diversity in the workforce across the industry and empower employers to hire qualified talent. This apprenticeship is an intense year-long, on-the-job training program that will build the skills and competencies needed to do the jobs of today and tomorrow.

Certification Programs

Programs comprised of exams and prep classes that demonstrate how you and your team perform against the highest industry standards:



IAB Digital Media Sales Certification
The only globally recognized, accredited professional certification created specifically for digital media sellers



IAB Digital Media Buying & Planning Certification
Demonstrates media professionals have the knowledge needed to plan and manage digital campaigns while meeting brand objectives



IAB Digital Ad Operations Certification
Demonstrates knowledge and competency in the area of digital ad operations



IAB Digital Marketing and Media Foundations Certification
The fundamental industry credential for professionals that support companies throughout the media buying lifecycle

In-Depth Insights and Analysis to Guide The Industry

IAB is committed to investing in essential research to help members and the industry better understand the digital media and advertising trends shaping our industry as well as analyzing where companies are spending money. Major IAB research efforts in 2021 were focused on the state of data and the demise of the third-party cookie, making sense of the ongoing effects of COVID-19 and its effect on digital media, video, and digital ad spending trends, and ongoing research into the effects of the direct brand economy.

- 50% of buyers say their 2022 budgets include greater investment with minority audiences—with Black, Indigenous, and People of Color (BIPOC) and LatinX audiences getting the lion's share of that increase.

IAB: Per-Advertiser CTV Spend Leapt 22% In 2020, 35% Expect To Increase CTV This Year

Internet Advertising Revenue Report 2020

For more than 25 years, IAB has released advertising trend data research with PwC to provide an accurate barometer of overall internet advertising growth. Long considered the industry benchmark for the health of the digital advertising ecosystem, the **IAB full year 2020 research** (released in April 2021) reported U.S. digital ad revenue at \$139.8 billion, which shows continued double-digit growth year-over-year of 12.2%, slightly lower than the 15.9% of the previous year but a testament to the sustained health of the interactive industry despite the pandemic. Additional key findings in the report show video and social media advertising experienced the largest increases year-over-year, taking share from linear TV. Programmatic revenue grew by nearly 25% in 2020.



Digital ad spend grew 12% in 2020 despite hit from pandemic

In addition to the **State of Data Research Initiative** with the Programmatic+Data Center and the **Economic Impact of the Market-Making Internet** study driven by the Public Policy team, IAB also invested in seminal industry research this year including:

IAB Ad Impact Studies

IAB chose to conduct two impact studies in 2021: one in the spring to herald NewFronts, and the other in the fall for the 2022 planning season. These reports capture any top drivers of changes in planning/buying/strategy and insights into buyer investments and trends. Key findings include:

- 2022 media ad budgets are expected to increase 13% year-over-year.
- The shift to digital continues, with traditional ad budgets projected to lose another 6% in 2022—predominantly from linear TV; the loss will be distributed across digital channels fairly evenly.
- First-party data acquisition/partnerships and measurement are key to buyers in 2022.

IAB Outlook Reports

To provide insight into the quantitative findings of IAB's Ad Impact and Ad Spend/Revenue work conducted during 2021, IAB partnered with PwC to provide two forward-looking **Outlook Reports**. For each, 20 industry leaders were interviewed individually to explore the rationale behind the quantitative results. Among the key findings are that waning consumer tolerance for (and expectations of) digital advertising is affecting the composition and size of audiences of ad-supported media and entertainment brands. A consumer-centric evolution is upon us and should include the development of new ad formats/resources/partnerships.



Randall Rothenberg, Executive Chair, IAB; **Chris Bruderle**, Senior Director, Research and Analytics, IAB; **Libby Morgan**, Senior Vice President, Chief Strategy Officer, IAB; **IAB Brand Disruption Summit 2021: The Disrupted Brandscape**

Federal government attention, as well as keen focus from this industry, is also required to reimagine and prepare for regulatory changes in privacy policies and additional actions by walled gardens. Additionally, the steep competition and current sense of urgency to attract and grow talent must also be balanced by the need to foster new or elevated corporate DEI policies.

- **IAB Outlook: 2021 Digital Ad Ecosystem** (March 2021)
- **Outlook 2022: The U.S. Digital Advertising Ecosystem** (October 2021)



IAB Report Charts The Rise Of Ecommerce Brands Fed By CTV And Retail Media



Brand Disruption 2022: IAB Annual Report on the Evolving Consumer Ecosystem

This fifth annual study of the Direct Brand Economy illustrates the snowball effect of changes in digital consumers, digital supply chain management, digital distribution, digital selling, and digital marketing. The report includes both aggregated second-party research and proprietary surveys and interviews to provide those companies which support consumer brands with a playbook for marketing in the future. Among the key insights:

- The storeless economy and the shift to ecommerce have accelerated 200-300% in large part due to the pandemic. Ecommerce is at almost **\$1 trillion in annual spending and will represent nearly a quarter of all shopping in the next few years.**
- Established retailers are wooing disruptor brands with preferential treatment in their retail media networks to fight for the business of Gen Z and millennials, who rarely go to retail to discover brands. Nearly half of big brands (versus 29% of disruptors) spending with retail media networks say retailers are *requiring* them to buy ads there.
- The barrier between physical and digital shopping is irrevocably gone. Local delivery, click-and-collect, and buy online, pick up in store (BOPIS) are up **45%, 52%, and 125% respectively.**

Convening Industry Leaders in a Rapidly Evolving Landscape

IAB strives to consistently provide unique thought-leadership and marketplace events to drive the industry forward, tackle pressing issues, and provide future-proof solutions—and 2021 was no exception.

The incredibly successful **IAB Annual Leadership Meeting** in February 2021 was the largest ALM to date, despite being held virtually, with more than 190 diverse speakers and 2,800+ attendees. IAB also recorded the most-ever event registrations for IAB virtual marketplaces like the **NewFronts** and **Podcast Upfronts** as well as IAB thought leadership tentpole events including the **Fall Marketplace**, which provided a new look at how valuable partnerships are being developed between brands and native digital content and technologies, and **Audience Connect**, the first-ever marketplace dedicated to identity management and identity solutions.

The **Brand Disruption Summit** in the Fall of 2021 focused on the growth path for both big, incumbent consumer brands and the rising generation of direct-to-consumer brands and the **Policy & Legal Summit** convened digital leaders to discuss challenges and solutions facing the media and marketing industry that will enable a sustainable and consumer-centric digital media and marketing ecosystem.

In an incredible testament to resilience and adaptability, the IAB team was able to offer a mix of IAB events both online and in a hybrid model in 2021 that offered industry-wide value, and which were widely acclaimed.



Randall Rothenberg, Executive Chair, IAB; **Sheryl Sandberg**, Chief Operating Officer, Meta / Facebook; **2021 IAB Annual Leadership Meeting**



David Cohen, Chief Executive Officer, IAB; **Conny Braams**, Chief Digital & Marketing Officer, Unilever; **2021 IAB Annual Leadership Meeting**

Katie Couric, American Journalist and Founder, Katie Couric Media; **2021 IAB NewFronts**

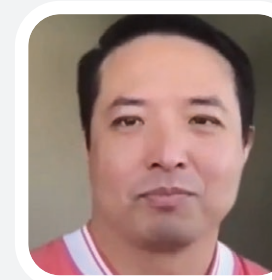


Lena Waithe, Founder & Chief Executive Officer, Hillman Grad Productions; **2021 IAB NewFronts**



Anthony Katsur, Chief Executive Officer, IAB Tech Lab; **Jennifer Fleiss**, Venture Partner, Volition Capital and Co-Founder, Rent the Runway & Jetblack; **2021 IAB Tech Lab Summit**

Patrick McLean, Senior Vice President and Chief Marketing Officer, Walgreens; **2021 IAB Brand Disruption Summit**



Steven Tristan Young, Chief Marketing Officer, Poshmark; **2021 IAB Brand Disruption Summit**



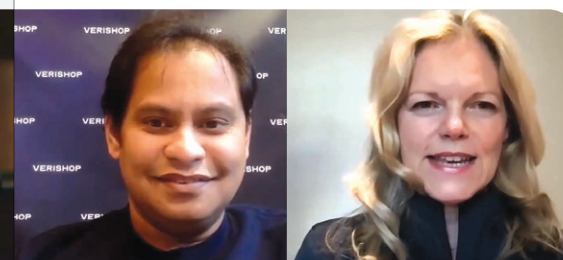
David Cohen, Chief Executive Officer, IAB; **Stacey Abrams**, Non-Profit Leader, Political Activist & Serial Entrepreneur; **2021 IAB Annual Leadership Meeting**

Evan Spiegel, Chief Executive Officer, Snap Inc.; **2021 IAB Annual Leadership Meeting**

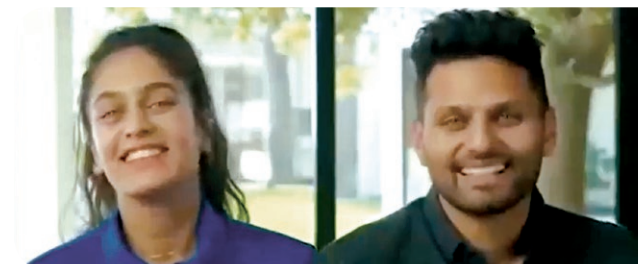


Carryl Pierre-Drews, Senior Vice President, Marketing & Communications, IAB; **Renaldo Webb**, Founder, PetPlate; **2021 IAB Brand Disruption Summit**

Imran Khan, Co-Founder and CEO, Verishop; **Claire Atkinson**, Chief Media Correspondent, Business Insider; **2021 IAB Brand Disruption Summit**



Radhi Devlukia-Shetty, Founder, Sama; **Jay Shetty**, Founder, Sama; **2021 IAB Brand Disruption Summit**



Al Franken, American Comedian and Former U.S. Senator, Host of The Al Franken Podcast; **2021 IAB Podcast Upfront**



Standards and Solutions That Advance Global Innovation and Growth

IAB Tech Lab engages a member community globally to develop foundational technology and standards that enable growth and trust in the digital media ecosystem. To accelerate industry innovation and growth, the Tech Lab is producing and helping companies implement global technical standards and solutions for digital media and advertising.



Project Rearc One Year In: IAB Tech Lab Proposes Specs For Accountability And Addressability

Key Tech Lab accomplishments in 2021 include:

Promoting Open-Source Solutions to Increase Cross-Industry Collaboration

To increase cross-industry collaboration to build transparency and trust in advertising technologies, the **Open-Source Initiative** is a concerted industry effort to organize and maintain relevant open-source projects in one place. It will provide actual standards



Amit Shetty, Former Vice President, Programmatic Standards & Partnerships, IAB Tech Lab; **Shobha Doshi**, Vice President, Programmatic Strategy & Operations, CafeMedia; **Melissa Gallo**, Senior Vice President, Global Exchange Operations, Yieldmo; **2021 IAB Tech Lab Summit: Renaissance**



Pierre Diennet, Global Partnerships, Lotame; **Alessandro Pireno**, Vice President, Product, HUMAN; **Doug Laurentano**, Chief Executive Officer, Rulo, a CivicScience Company; **Stephanie Hanson**, Offering Manager, OneTrust; **Anthony Katsur**, Chief Executive Officer, IAB Tech Lab; **2021 IAB Tech Lab Summit**

implementations that can be directly integrated and tools that can help deploy standards. In addition, the effort will share samples or reference standards to provide best practices for implementation. The initiative is governed by the IAB Tech Lab Architecture Group composed of Extreme Reach, GroupM, GumGum, Oracle, Tapad, and The Trade Desk. It launched with initial code contributions from engineering teams at Google, Index Exchange, The Trade Desk, and Zefr, and includes Unified ID 2.0 (UID2), brand suitability test benchmarks, and ads.cert.

Supporting the Growth of CTV and Cross-Media Video

In 2021, the Tech Lab introduced several new and revised standards to support the growth of CTV and cross-media video including **OpenRTB 2.6**, which incorporates ad pod features to support CTV buying; **Content Taxonomy 3.0** to support contextual buying of CTV content with the introduction of entertainment genres to categorize TV content; **app-ads.txt version**

1.0.3 to support fraud mitigation in CTV buying; **Authenticated Connections for Server Side Ad Stitching (SSAI)** to support safe and secure ad serving in CTV environments; and the **Programmatic Guide for CTV** to inform the use of all the technology standards that are needed for preparing, delivering, and measuring video ads using the programmatic channel.

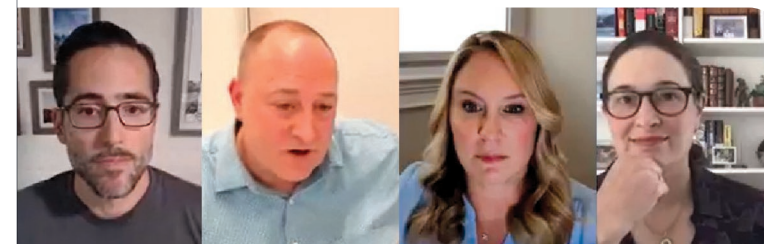


The UID 2.0 Code Base Is Officially Open Source

Advancing Standards for Responsible Addressability and Predictable Privacy

At ALM 2020, IAB and IAB Tech Lab introduced **Project Rearc**, an initiative to get stakeholders across the digital advertising and media supply chain working together to make the internet a better place for consumers—marrying the value of privacy, personalization, and community. IAB and Tech Lab are now working with more than 20 other trade organizations globally in support of this effort.

As part of the **Project Rearc**, Tech Lab launched the core standards for responsible addressability and predictable privacy including the **Global Privacy Platform** document that represents progress toward a Global Privacy Platform (GPP) architecture. The



Doug Laurentano, Chief Executive Officer, Rulo, a CivicScience Company; **Anthony Katsur**, Chief Executive Officer, IAB Tech Lab; **Susan Parker**, Chief Strategy Officer and EVP, Strategy & Data, Nexstar; **Kelly Metz**, Managing Director, Linear and Advanced TV Activation, Omnicom-Media Group; **2021 IAB Tech Lab Summit: Renaissance**



Accountability Platform is designed to ensure that all digital advertising supply chain participants can consistently show that they are adhering to user preferences. The **Best Practices for User-Enabled Identity Tokens** document establishes guidelines for the encryption and use of user-enabled IDs—notably email addresses and phone numbers—in scenarios when online publishers or marketers offer personalized content or services tied to a user-provided email or phone number.



IAB Tech Lab Offers to Keep Track of Transparency Tools

The **Taxonomy and Data Transparency Standards to Support Seller-defined Audience and Context Signaling** document proposes an approach to addressability that revolves around the use of anonymized taxonomy nodes—sourced from IAB Tech Lab's Content Taxonomy 2.x or Audience Taxonomy 1.x—to signal publisher defined context or audience attributes within OpenRTB. The **id-sources.json** technology adds additional transparency to the supply chain by providing a standard way to identify which companies use and transmit which unique-to-user identifier sources. Tech Lab also assumed management and governance of the **UID 2.0 source code** as part of the newly launched open-source initiative.



Neal Richter, Director, Advertising Science, Amazon Advertising; **Scott Ronay**, Vice President, Publisher Business Development, LiveRamp; **Nicole Scaglione**, Vice President, CTV & OTT, PubMatic; **2021 IAB Tech Lab Summit: Renaissance**

Besides the core standards, the Tech Lab continued the education and awareness campaign for predictable privacy and responsible and accountable addressability bringing together industry experts via the **Addressability Solutions Roadshow** covering the U.S., EMEA, and APAC regions throughout the year.

Accelerating Global Measurement Infrastructure Progress

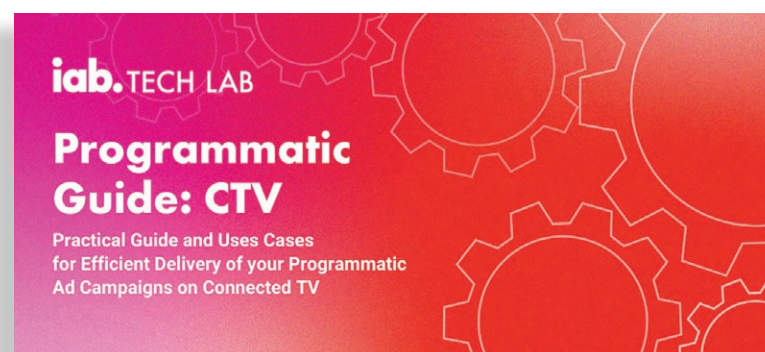
Reliable and scalable measurement is essential to a healthy digital ecosystem. The Tech Lab released the **Podcast Measurement Guidelines 2.1** with new detailed recommendations for calculating IPv6 metrics, user agent structure, filtering guidance for Apple watchOS user agents, language edits such as typo corrections, and additional podcast player recommendations. The **OM SDK for Web Video Compliance program** was also put in place to certify OM SDK for web video certification with over a dozen integrations certified for web browser viewability measurement.



Digital Ad Vet Anthony Katsur
Named CEO of IAB Tech Lab

Promoting Supply Chain Transparency and Security

To enhance security in the digital advertising ecosystem by using industry-standard cryptographic security protocols the Tech Lab released the **ads.cert 2.0 standard**. In particular, the protocols



secure buying and selling of programmatic Connected TV (CTV) ad inventory. To help address the challenges around malvertising and nefarious ads by providing transparency around the entities that are involved with publishing such ads, the Tech Lab also released two new buy-side transparency standards: **buyers.json** and **DemandChain Object**.



To provide a resource that makes it easy for digital advertising participants—buyers, sellers, and ad tech companies—to see which standards media partners have implemented, their level of compliance, certification program results, and more, Tech Lab announced the initial launch of the **Transparency Center** as a free resource. The Transparency Center includes **Supply Chain Validation** that aggregates metadata about the supply chain, including **ads.txt** (authorized digital sellers), **sellers.json**, as well as other supply chain management tools; a **Global Industry Compliance Registry**, which provides detailed industry compliance and certification status of supply chain partners around the world; **Advertising System Aggregation** which

identifies information about supply chain partners across different advertising systems as well as their business classification.

To educate and inform the industry on the proper use of taxonomies, Tech Lab published a **Brand Safety Implementation Guide** that includes guidance for DSPs, Verification Providers, SSPs, and publishers.



IAB Tech Lab Rolling Out Two New Measurement Tools For CTV

Expanded Compliance Programs to Supercharge Growth

Standards are essential, but so is compliance and compliance programs saw tremendous growth in 2021 ending with more than 120 certified integrations for Open Measurement SDK, 23 podcast measurement certifications with over seven companies certified for the latest 2.1 guidelines, and six companies certified for Data Transparency Compliance. In addition to the **Addressability Solutions Roadshows** throughout the year, IAB Tech Lab also hosted two key events. First was the **CTV & Video Advertising: Growing with Standards** on June 9, covering privacy, brand safety, ad fraud, delivery and sales, measurement, and interactivity

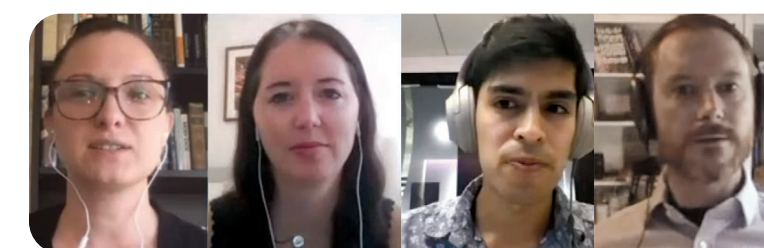
- Neal Richter, Amazon Ads
- Paul Bannister, CafeMedia
- Derek Nicol, CBS Interactive
- Todd Parsons, Criteo
- Daniel Brackett, Extreme Reach
- Scott Spencer, Google
- Eddie Dingels, GroundTruth
- Michael Palmer, GroupM
- Ken Weiner, GumGum
- Michael Smith, Hearst
- Sheryl Goldstein, IAB

- David Cohen, IAB
- Anthony Katsur, IAB Tech Lab
- Andrew Casale, Index Exchange
- Tom Sharma, Integral Ad Science
- Gyanda Sachdeva, LinkedIn
- Travis Clinger, LiveRamp
- Karan Dalal, Media.net
- Ashish Shukla, MediaMath
- Will Bullock, Meta / Facebook

- Aleksandr Rebrikov, Microsoft Advertising
- Ryan McConville, NBCUniversal
- Steven Silvers, Neustar
- Stephanie Layser, News Corp
- Paul Ryan, OpenX
- Mark Kopera, Oracle Advertising & Customer Experience
- Chris Record, Pandora
- John Sabella, PubMatic

- Somer Simpson, Quantcast
- Curt Larson, Sharethrough
- Michael Peralta, T-Mobile Marketing Solutions
- Jeff Olchovy, Tapad
- Gruia Pitigoi-Aron, The Trade Desk
- Ray Cao, TikTok
- Kevin Solinger, Xandr
- Giovanni Gardelli, Yahoo
- Ai Matsubara, Yahoo Japan Corporation

2021 IAB Tech Lab Board



Jill Wittkopp, Senior Director, Product Management Software, IAB Tech Lab; **Amanda Cabrera**, Head of Publisher Partnerships, Adobe; **Jack Wellborn**, Team Lead, Web Video, Internal Ad Science; **Nicolas Chavez**, Senior Software Engineer, Google; **2021 IAB Tech Lab Summit: Renaissance**

in connected TV advertising. The second event was the **IAB Tech Lab Summit: Renaissance – The Next Generation of Privacy, Addressability & Safety**, which focused on how the pandemic lifestyle accelerated the already explosive growth of video streaming and CTV coupled with heightened brand safety challenges for advertisers, global privacy and new data protection regulations, and privacy-first design overhauls of major browsers and operating system platforms.

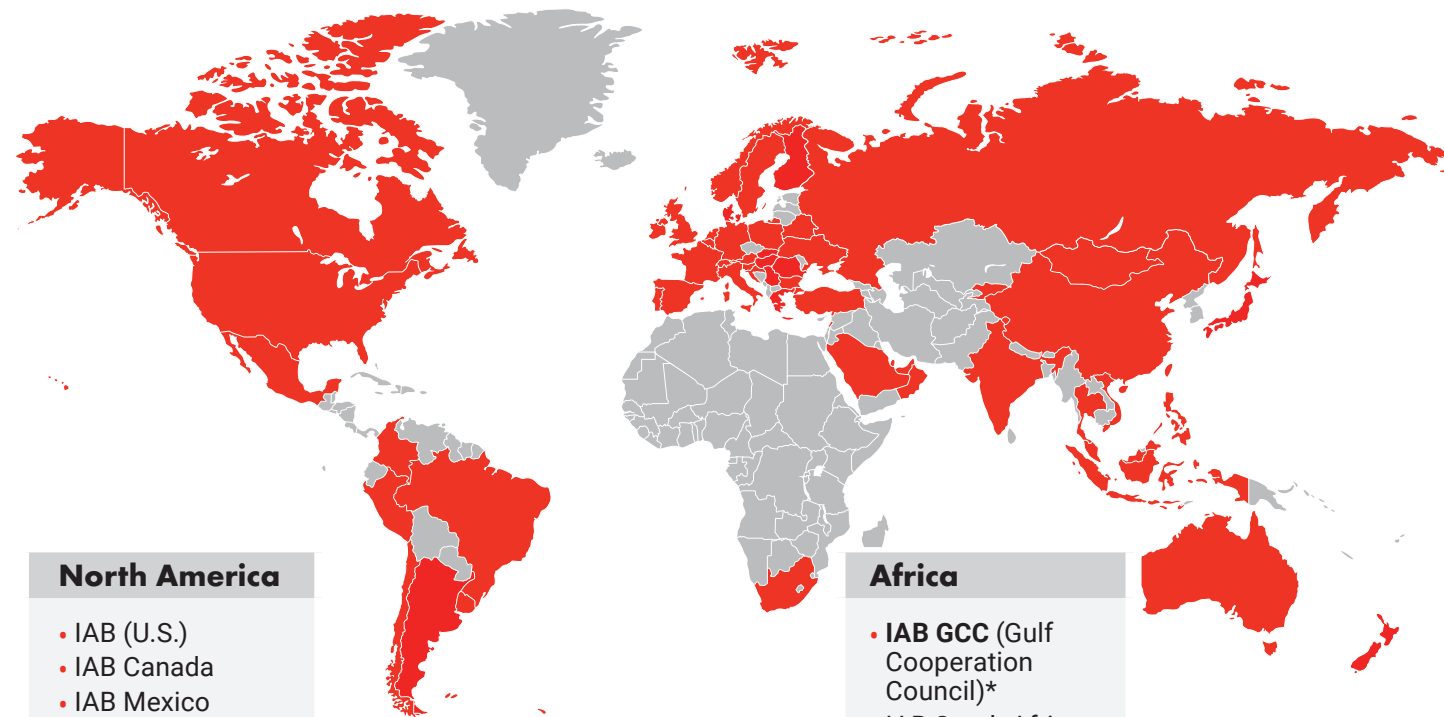


IAB Tech Lab escalates attack on CTV ad fraud with ads.cert 2.0

Promoting Global Thought Leadership and Collaboration

IAB and IAB Tech Lab support members' international agendas by leveraging the strength and collaboration of the IAB Global Network, encompassing 46 IAB organizations. The international team aims to further the overall mission of IAB and to serve the interactive ad industry by advancing global thought leadership, expanding the IAB brand into strategic markets, and

encouraging self-regulation, public policy, and the adoption of global technical standards. In 2021, the IAB Global Network focused its efforts on issues that profoundly impact the entire media and marketing ecosystem: digital transformation, consumer privacy, and regulations.



North America

- IAB (U.S.)
- IAB Canada
- IAB Mexico

Africa

- IAB GCC (Gulf Cooperation Council)*
- IAB South Africa

South America

- IAB Argentina
- IAB Brazil
- IAB Chile
- IAB Colombia
- IAB Peru
- IAB Uruguay

Europe

- IAB Austria
- IAB Belarus
- (BAM) IAB Belgium
- IAB Bulgaria
- HURA (IAB Croatia)
- IAB Denmark
- **IAB Europe***
- IAB Finland
- IAB France
- BVDW (IAB Germany)
- IAB Greece
- IAB Hungary
- IAB Ireland
- IAB Italy
- IAB Macedonia
- VIA (IAB Netherlands)
- INMA (IAB Norway)
- IAB Poland
- IAB Portugal
- IAB Romania
- IAB Russia
- IAB Serbia
- IAB Slovakia
- IAB Slovenia
- IAB Spain
- IAB Sweden
- IAB Switzerland
- IAB Turkey
- IAB UK
- IAB Ukraine

Asia Pacific

- IAB Australia
- CAA (IAB China)
- IAB Hong Kong
- JIAA (IAB Japan)
- IAB New Zealand
- **IAB SEA + India** (Southeast Asia + India)*

*Regional IABs

iab. 2022 EVENTS

February 7-10

IAB ANNUAL LEADERSHIP MEETING

April 5

IAB PLAYFRONTS

May 2-6

IAB NEWFRONTS

May 10-12

IAB PODCAST UPFRONT

June 8

IAB PUBLIC POLICY & LEGAL SUMMIT

June 9

IAB TECH LAB SUMMIT

September 10-12

IAB AUDIENCE WEEK

October 11-12

IAB BRAND DISRUPTION SUMMIT

Empowering and Connecting IAB Members

The IAB mission is to empower the media and marketing industries to continue to thrive in the digital economy and help IAB members strengthen these industries. IAB membership comprises more than 700 leading media and technology companies, now also including brands and advertising agencies. We thank all members for their support throughout the year.

Brands * New Members

General Members

605
8451*
16 Handles
3 Day Blinds
33Across
6Sense
8th Wall*
A+E Networks
A360Media
Aarki
AARP
ACAST
AccuWeather
Activision Blizzard Media*
AcuityAds
Axiom
Ad Lightning
Ad-ID
Adacado
Adapex
AdaptMX
AdBrilliant
AdColony
Adelaide*
Adform
AdGear
AdKernel
AdLarge Media
ADLOOX
Admiral Adblock Publisher Solutions
Admix*
Adobe
Adomik*
AdPushup
Adslot
Adstra
Adswizz
AdTheorent
Advance Publications
Aer Lingus Limited
Affinity Solutions
Allen Media, LLC
Alliant
Allstar Innovations
ALOHA
Altice USA
Amazon Ads
AMC Networks
AmeribaseDigital Powered by Lighthouse List Company
American Public Media
Amino Payments
Amobee
Ampersand
Anatomie

Andie Swim
Anheuser Busch InBev
Aniview
Anyclip
Anzu*
App Samurai
Arkadium
ART19
Artsy
Audacy
Audigent*
Audioboom
Babbel
Backtracks
Bank of America
Barstool Sports
BauBax
Bayer
BBC America
BD (Becton, Dickinson and Co.)
Beachfront
Beau Ties
Beeswax
Beliv
Bespoke Post
Best Buy Retail Media Network*
Bhang Inc
Bidtellect
Bigabid
BIGtoken
Bitcentral*
Blingby
Blis
Bloomist
Brandless
BroadSign
Brookdale Senior Living
Brookline
Brooklyn Roasting Company
BuzzFeed
Buzzsprout
Cadent
CafeMedia
Canoe Ventures
Capital One
Captivate
Caskata
CatapultX*
Celtra*
Centro
Chairish
Chandanni
Channel Factory
Chartable

Chipotle*
Citigroup
City National Bank
Claritas
Clinch
Clipcentric
CNET Media Group*
Colgate-Palmolive
Column6*
Comcast Spotlight
Command Precision
Commonwealth Joe Coffee Roasters
Comscore
Condé Nast
Confiant
Connatix Native Exchange
Consumable
Conversant Media
Conviva
Cooler Screens*
Cox Enterprises
Cox Media Group
Crackle Plus
Crinetics Pharmaceuticals
Criteo
Cuebiq
Customer ID*
Dailymotion
DanAds*
Data Axle*
DAX U.S.
DeepIntent
Dell
Dentsu Holdings USA*
Dermstore
DeviceAtlas
diDNA*
DIG Labs
Digital Remedy
Digital-Ignite
Diray Media*
Discovery Communications
DISH
Disney Advertising Sales
Displayce*
DISQO*
DMD Marketing Corp.
Dormify
Dosh
Dotdash
IHS Markit
DoubleVerify
Dstillery
Dynata
E. & J. Gallo Winery
EarfleeK
Eargo
eBay
Electronic Arts

eMarketer
Emodo
EmpireStreaming
EMX Digital
Equifax
Estrella Media
Evidon
Expedia Media Solutions
Experian Marketing Services
Extreme Reach
eyeo GmbH*
Eyeota
Fandom
Fernish*
Firefly*
Flashtalking
Flipboard
Fluent
Flywheel Sports
Forbes Media
Forensiq
FOX
Frameplay*
Fred Segal
Freestar
Freshly
fuboTV
Future US
Fyber
Gameloft
Gamesight*
Gap*
GeistM
General Motors Company
Genius Monkey
GeoEdge
Gimbal
Globeln
Goodway Group
Google
Gray Line Worldwide
GRESSO
Group Nine Media
GSTV
GumGum
H Code Media
Haerfest
Hanley Wood
Hartsfield-Jackson Atlanta International Airport
Hashtag Labs*
HealthNation
Healthline Media
Hearst
Helen & Gertrude*
Helios Data*
Helix Sleep
Hiscox
HMETE
Hobo
Horizon Media*
HP
Hubble Contacts
Hulu
HUMAN
IBM Watson Advertising
iHeartMedia
IHS Markit
Index Exchange
Infolinks
Infutor*
Inmar Intelligence
InMarket*
InMobi
Innity
Innovid

INOVA
Inscape
Insticator
Instinctive
Instreamatic
Integral Ad Science
Intel
Interactive Offers*
Investor's Business Daily
IPONWEB
IRI
IRIS.TV*
iSpot.tv
Jetpack
Jivox
Johnson & Johnson
Jukin Media
Julianna Rae
Jun Group
JUST WATER
JW Player
Kabbage
Kargo
KERV Interactive
Ketch*
Kevel
Kidoodle.TV
Kochava
Konduit
Kopari Beauty
Kroger
L'Oreal
Labelium US*
Lancer Skincare
Latido Networks*
LATV*
Leaf Group
Leatherman Tool Group
LendingTree
LG Ads*
Libsyn
LinkedIn
Liquidus Marketing
Livelihood
LIVELY
LiveRamp
Loeffler Randall
Lotame Solutions
Lucid
Lucidity
LVMH
Made In Cookware
Madhivie
Magnite
Mahlia Collection
Market Egnuity
Marla Aaron Jewelry
Mars Petcare
Mastercard
Mattress Firm
Maven
Media Place Partners ad
Adtegrity Company
Media.net
Mediahub*
MediaKind*
MediaMath*
MediaNews Group
MediaRadar
Medicx Media Solutions
Megaphone
Meredith Digital
MeritDirect
Meryl Diamond Ltd
Meta / Facebook
Method Media Intelligence
Mezzetta Foods

MGID
Micron
Microsoft Advertising
MiQ
Mirriad*
Mobilewalla
Monster
Monster Energy
Montclair State University
Morningstar*
Museum of the City of New York
Music Audience Exchange
NASCAR Digital Media
National Football League (NFL)
National Public Media
NaviStone
NBCUniversal
Nectar
Neustar*
New York Public Radio
The New York Times Company
News Corporation
Nexstar Digital
Nexstar Media
Nexstar, Inc.
NexTech AR Solutions*
NextRoll
Niantic*
Nielsen
NomNomNow
NorCal Cannabis Company
Northwell Health
Nucleus Marketing
Nutrafol
NYIAX
Oars + Alps
Ocean Spray Cranberries Inc.
Omnicom Media Group*
OneTrust
OpenSlate
OpenWeb
OpenX
Oracle Advertising & Customer Experience
Orange142
Ori Apparel Inc.
Origin Media*
Outbrain
Outer
Outfront Media
Ovia Health
Pandora
Peach Goods
Penn State University
Pepperjam
PepsiCo
Pfizer
PGA TOUR
Philo
Pinterest*
Pixer
Pixalate
Place Exchange*
PlaceIQ
Placements.io*
Plantation Products
Platform Inc.
PodcastOne
Podcasts
Podtrac
Powerinbox
Premion
Procter & Gamble
PsychArmor Institute

Public Media Marketing
Publica
Publishers Clearing House
PubMatic
PubWise
PulsePoint
PureFormulas
PushSpring
Quantcast
Rakuten Advertising
RawVoice
RB Health
Redbox*
Renew Anchored Dentures
Reuters
RevContent
Reveal Mobile
RevJet
rewardStyle
RiskIQ
Roku
Roundel*
Rovio
Rutgers University
RXBAR
Samba TV
Samsung Ads
Sarah Flint
SAS Institute
Sayollo*
SC Johnson
Scholl's Wellness Company
Scotts Miracle-Gro
Scotts Moving
SFBX*
ShareThis
Sharethrough
SHE Media
Shopify*
Silverbullet*
Simplifi
Simulmedia*
Sirius XM Satellite Radio
Slate
Slickdeals
Smaato
Smart AdServer
SmartyAds*
SmileDirectClub
Smithsonian Media Group
Snapchat
Solé Bicycles
Solo Stove

Sonobi
Sony Music Entertainment
SoundCloud
Sourcepoint
Sovrn
Spectrum Labs*
Spectrum Reach
SpineNevada
Spotify
Squire Patton Boggs*
StackAdapt
Stanley Martin Homes
Start.io*
Starwood Retail Partners
Stirista*
Stitcher
Strategus
Strategy+Business
Sublime Skinz
SuperAwesome
Surfside*
Sustainable Snacks
Synacor
T-Mobile
T-Mobile Marketing Solutions*
Taboola
Taco Bell
Talking Rain Beverage Company
Tapad
Tapjoy
TargetSpot
Tatari
Tavant*
TB12
TD Ameritrade
Teach For America
Teads
TEGNA*
Terminus
The Arena Group
The Atlantic
The Coca-Cola Company
The Guardian US*
The Hansen Company
The Hershey Company
The Inquirer
The Man Company
The Media Trust Company*
The Sill
The Trade Desk
The Wolf Project
THECE*

ThirdLove
TIAA
Tiege Hanley
TikTok*
Timhep
Tivo
TomboyX
Tommy Hilfiger
Toyota Motor North America
Traffic Steer
TrafficGuard
Transmit.Live*
TransUnion
Tremor Video
TreSensa
Tribune Publishing
Trigger*
TripAdvisor
TripleLift
Triton Digital
Trivver*
true[X]
TrueData
Trusted Media Brands
Tubi
Tubular Labs
TULA Skincare
Tuneln
TurboTax
TUSHY
TVision*
tvScientific*
TVSquared
Twitter
Uber
Ubimo
Undertone
Unibail-Rodamco-Westfield
Unilever
Unity
Universal Parks & Resorts
University of Phoenix
Univision*
US News & World Report
Valassis
VCC Brands
Vestro
Veritonic
Verve Group*
Vevo
ViacomCBS
Viant

Vibronomics*
Vibrant Media
Vice
VideoAmp
ViralGains
Visa Advertising Solutions
Visit Orlando
VIX
VIZIO
Vox Media Podcast Network
Voxnest
VRTCAL
Vungle
Walgreens Advertising Group*
Wander Beauty
Warner Bros. Digital Media Sales
WarnerMedia
Washington Post Digital
WBUR
Weedmaps
Weiman Products
Wellow
WellWell
Westwood One
WideOrbit
Willard
Williams-Sonoma
Winc
WireWheel*
Wondery
WoodWing
Worldata
WPP US*
Wrench
Wunderkind
WWE
X-Mode
Xandr
Yahoo
YieldLift
Yieldmo
ZAM Network
Zeel
Zefr
Zeotap
Zergnet
Ziff Davis
ZippyPaws Inc.
ZipRecruiter Inc.
Zoom Media
Zynga
ZypMedia

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Akin Gump Strauss Hauer & Feld LLP
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BPA Worldwide
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Dun & Bradstreet
Dynata
Ebiquity
Essence
Frankfurt Kurnit Klein & Selz
GfK North America
GroupM
Havas Media Group
North America
Helen & Gertrude
Ipsos
Kelley Drye & Warren LLP
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Loeb & Loeb
Lowenstein Sandler LLP
McKinsey & Company
Media Japan Network
Media Management Inc.
MediaLink
Mortgage Solutions Financial
News Media Alliance
Paul Hastings LLP
PIVnet
Prisa Brand Solutions
Prohaska Consulting
RPA
Varick Media Management
Veritone One
Winterberry Group
WireWheel

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Adelaide
AdNode
AdSensor
ArcSpan Media
Arity
AudienceRun
Bidstack
Big Happy
Bloxbiz
Customer ID
Duration Media
Frameplay
Fylo
GreenPark Sports
HyperTV
Ketch
Latido Networks
LG Ads
Magellan AI
Maximus Live
Mooko Media
NoBid
OneDash
Origin Media
Preciso
Pubfinity
SafeGuard Privacy
Sayollo
ScaleMonk
TheViewPoint
Trinity Audio
Truthset
TVDataNow
tvScientific

IAB Tech Lab Members

All IAB U.S. general members are automatically members of the Tech Lab. Additional members include:

1plusX
51Degrees
A Million Ads
ACPM
AdButler
Adjust
Admixer EU GmbH
Adomik
AdProfs
AdsCompass
AdShares
Adverty
AdView
Algorix
AlikeAudience
Alliance for Audited Media
Amagi
Aotter
Appier
AppLovin
Audio Alliance GmbH
Audion
Audit Bureau of Circulations UK
Axel Springer SE
BARC India
Baycloud Systems
Ben Humphry Ltd.
Bidstack
BPA Worldwide
Broadpeak
Browsi
Canvas Worldwide
Capify
Carta Holdings Inc.
CBC Radio Canada
CHEQ
CIMM
Cint
Civic Science
Cloudview Technology Limited
Contxtful
Cyberagent, Inc.
D-Block
D. A. Consortium Holdings Inc.
Datmean
Dentsu
Didomi
Display.io
Displayce
Doceree Inc.
E-Planning.net
EdiPub
Erstream
Eskimi DSP
European Interactive Digital Advertising Alliance
European NetID Foundation
European Publishers Council
Fiducia DLT Ltd
FLUX Inc.
Great Software Laboratory Private Limited
Gridsum
GroundTruth
Habu
Hotstar
ID5
Iubenda
Jounce Media
Julep Media GmbH
Kinesso LLC.
Knitting Media
Line
Local Media Consortium
Localsensor
Macromill, Inc.
Mail Metro Media
MediaKeys
Meetrics
MetaX (China)
Mfilterit
Miaozhen Information Consultancy Co., Ltd
Mintegral
Network Advertising Initiative
Neustar
News UK
Nowtilus
NumberEight
OceanSpray
Ogury
Pelmorex
Permission.io
Permutive
PIVnet
PPC Protect Limited
PricewaterhouseCoopers LLP
Promogo
Protected Media
Publicis Groupe
Reach PLC
Rebel Base Media
RTBAsia
SFBX
Sirdata
Spoods
Telegraph Media Group
The Aber Group
TrustX
ucfunnel Co., Ltd.
UNICORN Inc.
Usercentrics GmbH
Videonow
Virtual Minds AG
Waveline Media
White Bullet
Yahoo Japan Corporation
YOSPAC
Zee entertainment Enterprises Limited

2021 IAB Committees, Councils, and Working Groups

IAB committees and councils are where industry functional leaders and subject matter experts share best practices and develop advanced research on burning industry issues.

These groups include the brightest minds in the industry working together to develop solutions that improve the interactive advertising and marketing ecosystem for everyone.

If you are interested in joining an IAB committee, council, working group, or task force, please contact membership@iab.com

Experience Center

Augmented Reality (AR)

AR Buyers' Guide Working Group

AR Creative Showcase Working Group

Games and Esports

PlayFronts Advisory Group

Games and Esports Advertising Framework Working Group

Voice

Voice for Brands Working Group

Media Center

Audio Committee

Jennifer Bongiovanni, *dentsu*, Co-Chair

Gina Garrubbo, *National Public Media*, Co-Chair

Carrie Lieberman, *iHeartMedia*, Co-Chair

Advanced TV Committee

Chris Falkner, *Cuebiq*, Co-Chair

Doug Fleming, *Hulu*, Co-Chair

Digital Video Committee

Jarred Wilichinsky, *ViacomCBS*, Co-Chair

Programmatic+Data Center

Automation Committee

AI Standards Working Group

Mainak Mazumdar, *Nielsen*, Co-Chair

David Olesnevich, *IBM Watson Advertising*, Co-Chair

Identity and Audience Data Committee

Alysia Borsa, *Meredith Digital*, Co-Chair

Browser/OS Ads Testing Task Force

Terms & Conditions Survey Working Group

Measurement and Attribution Committee

Shailin Dhar, *Method Media Intelligence*, Co-Chair

Jessica Hogue, *Innovid*, Co-Chair

Steve Latham, *Flashtalking*, Co-Chair

Marc Vermut, *Neustar*, Co-Chair

Measurement & Reporting Framework Working Group

Retail Media Committee

COUNCILS

Agency Leadership Council

Brand Council

CRO Council (Chief Revenue Officers)

Christine Cook, *WarnerMedia*, Co-Chair

Legal Affairs Council

Programmatic CEO Council (Chief Executive Officers)

Public Policy Council

Todd Thorpe, *News Corp*, Chair

Publisher Council

Research Council

Talent Development Council

iab.TECH LAB

IAB Tech Lab Council

Ad Product Portfolio Working Group

CTV Technical Working Group (Connected TV)

Data Transparency Standards Working Group

Digital Video Technical Standards Working Group

Distributed Ledger & Cryptography Emerging Technologies

Global Privacy Working Group

Open Measurement Working Group

Open Measurement Commit Group

Open Measurement for CTV Working Group

Podcast Technical Working Group

Programmatic Supply Chain Commit Group

Programmatic Supply Chain Working Group

Privacy & Rearc Commit Group

Rearc Accountability Working Group

Rearc Addressability Working Group

Rearc Global Task Force

Safe Ad Container Working Group

SIMID Working Group

Taxonomy & Mapping Working Group

Sustained Investments in IAB Members' Success

Delivering value to our members is our top priority at IAB and the financial state of IAB started and ended the year strong, allowing us to invest in solutions for growth for our industry and our members.

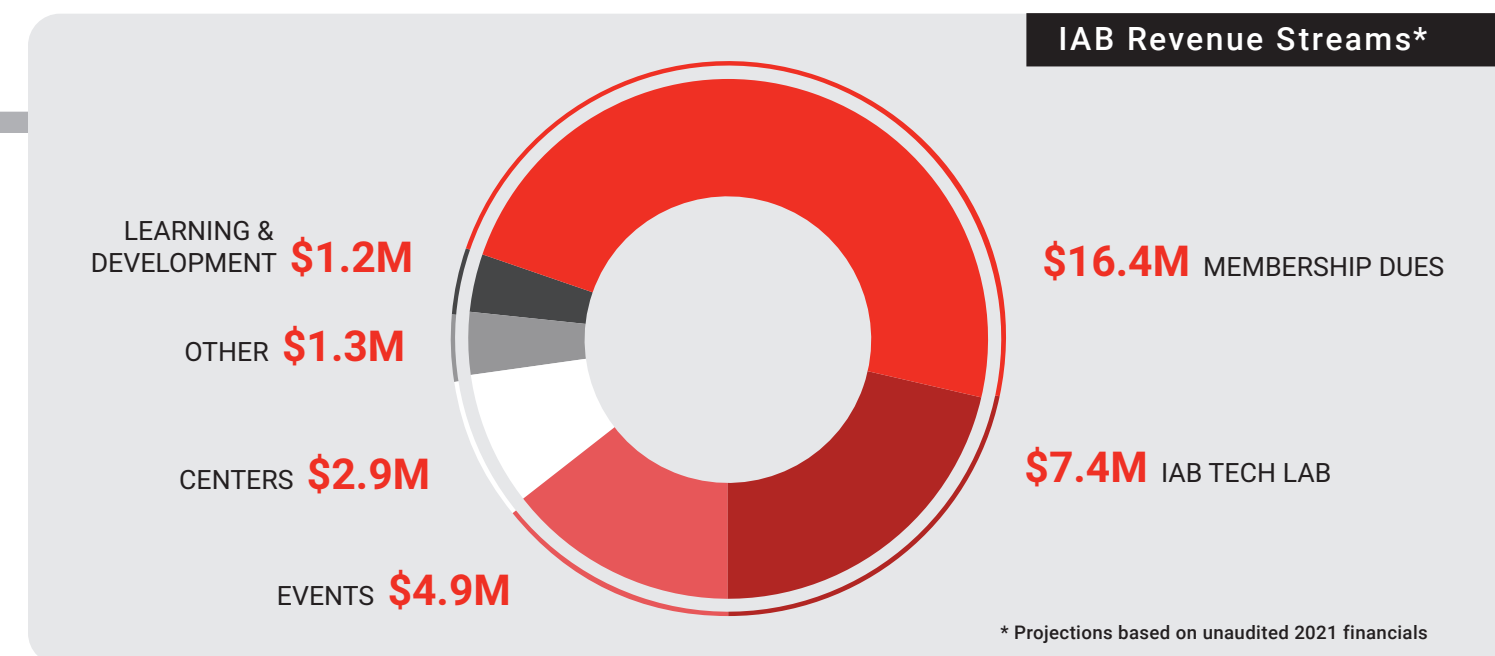
According to unaudited financials, IAB finished 2021 with \$3.6 million net income versus the projected budget loss of \$148,000—an incredible achievement and a show of resilience for both IAB and IAB Tech Lab.

Despite another year of tremendous pandemic uncertainty, we were able to support the industry and deliver positive net income well above and beyond what we had planned. Membership dues revenue is projected to be \$16.4 million for 2021, versus \$15.7 million in 2020. Events at IAB in 2021 are expected to bring in \$4.9 million, much higher than budgeted, despite most events being virtual for the second year in a row. This

was largely due to our hugely successful virtual events in the first half of the year and the addition of three new events in the second half of the year to address new opportunities for our members: the Fall Podcast Upfront, Audience Connect, and the Fall Marketplace.

Learning & Development revenue totaled \$1.2 million versus \$1.7 million budgeted, slightly softer than expected but it surpassed its year-end projection by \$242,000 driven by a new head of the division and a handful of enterprise deals. The IAB Tech Lab is also expected to bring in a healthy \$7.4 million in its sixth year of operation, compared to \$6.4 million in 2020, due to growth in membership and the Tech Lab Summit event.

Other bright spots in 2021 were our centers of excellence. The addition of two new boards in the Experience Center, the AR Marketplace Board, and



the Games and Esports Marketplace Board, drove an increase in revenue, as did the addition of an Audio Board in the Media Center.

Both IAB and the IAB Tech Lab showed significant savings in employee expenses due to attrition and as we delayed our return to the office in the pandemic. Virtual events, which are less expensive to produce than in-person events, allowed us to realize some savings as well.

Additional ongoing revenue streams in 2021 included initiatives such as sponsored research, member services, international licensing fees, and other fundraising programs. IAB invested these revenues received towards helping member businesses grow and excel. Funding was directed toward producing valuable third-party research and tools for building brands in digital media.

Overall, IAB managed expenses closely in 2021, which are projected to total \$26.7 million and closed the year with \$3.6 million net income and is very well positioned for an ambitious and fiscally sound 2022.

Financial Key Indicators for 2021

REVENUE	**2021 PROJECTED	2021 BUDGET PRO FORMA	\$ VAR	% VAR	2020 ACTUAL PRO FORMA	% VAR	2019 ACTUALS PRO FORMA	% VAR
MEMBERSHIP DUES	\$ 16,490,102	\$ 14,040,000	\$ 2,450,102	17%	\$ 15,706,094	5%	\$ 16,677,801	-1%
EVENTS	\$ 4,984,724	\$ 3,249,500	\$ 1,735,224	53%	\$ 5,945,751	-16%	\$ 7,534,601	-34%
EXPERIENCE CENTER	\$ 787,000	\$ 700,000	\$ 87,000	12%	\$ 530,000	48%	\$ 893,333	-12%
MEDIA CENTER	\$ 1,545,000	\$ 1,400,000	\$ 145,000	10%	\$ 1,334,479	16%	\$ 1,498,614	3%
PROGRAMMATIC+DATA CENTER	\$ 595,000	\$ 1,000,000	\$ (405,000)	-41%	\$ 700,000	-15%	\$ 1,115,000	-47%
LEARNING & DEVELOPMENT	\$ 1,242,381	\$ 1,705,145	\$ (462,764)	-27%	\$ 1,013,206	23%	\$ 967,481	28%
*TECH LAB	\$ 7,457,154	\$ 7,676,181	\$ (219,027)	-3%	\$ 6,420,718	16%	\$ 6,526,478	14%
OTHER	\$ 1,320,329	\$ 1,290,000	\$ 30,329	2%	\$ 1,507,331	-12%	\$ 1,924,435	-31%
TOTAL REVENUE	\$ 34,421,691	\$ 31,060,826	\$ 3,360,865	11%	\$ 33,157,578	4%	\$ 37,137,742	-7%
COST OF GOODS SOLD	\$ 4,034,904	\$ 3,260,678	\$ 774,226	24%	\$ 4,004,912	1%	\$ 6,357,725	-37%
GROSS PROFIT	\$ 30,386,787	\$ 27,800,149	\$ 2,586,638	9%	\$ 29,152,667	4%	\$ 30,780,017	-1%
EXPENSES	\$ 26,747,640	\$ 27,949,134	\$ (1,201,493)	-4%	\$ 27,714,997	-3%	\$ 30,145,621	-11%
NET INCOME	\$ 3,639,147	\$ (148,985)	\$ 3,788,132	-2543%	\$ 1,437,669	153%	\$ 634,396	474%

*Excluding revenue share ** Unaudited Financials

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About IAB

Interactive Advertising Bureau
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The Interactive Advertising Bureau empowers the media and marketing industries to thrive in the digital economy. Its membership comprises more than 700 leading media companies, brands, agencies, and the technology firms responsible for selling, delivering, and optimizing digital ad marketing campaigns. The trade group fields critical research on interactive advertising, while also educating brands, agencies, and the wider business community on the importance of digital marketing. In affiliation with the IAB Tech Lab, IAB develops technical standards and solutions. IAB is committed to professional development and elevating the knowledge, skills, expertise, and diversity of the workforce across the industry. Through the work of its public policy office in Washington, D.C., the trade association advocates for its members and promotes the value of the interactive advertising industry to legislators and policymakers. Founded in 1996, IAB is headquartered in New York City.

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IAB Tech Lab Mission

Engage a member community globally to develop foundational technology and standards that enable growth and trust in the digital media ecosystem.

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Report

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