




# TRUST MATTERS

**AMAA Media Trust Report 2019**

**The 4th annual AMAA Media Trust Study**

---



This is the fourth year of the AMAA's Media Trust Study where we take the pulse of marketers and media agency professionals across the industry.

Higher levels of trust within the digital ecosystem and between ad trading partners, has benefits for all industry members, so each year we ask you, the marketers and media professionals working in the business, for your views.

# Trust Matters - Right?

---

Each year we check in with the industry about the trust levels across key indicators and regarding the channels within the now largest media – digital.

Last year when we asked marketers and media agencies, "What would be the impact of more robust industry self-regulation with digital trading partners certified for best practice?" 70% of you said "increased trust" and 55% of you said "less risk for marketers". This seems to point us in the right direction.

Maybe the outcomes from the recent ACCC Digital Platforms Inquiry Final Report will focus our thoughts. We found that the subset across the ACCC Preliminary Report agreed change is needed - see page 21 for more details.

The industry is well and truly in the regulator's spotlight with everything from the market power of global digital platforms, to the imbalance of negotiating power of local media, to how consumers' digital data is co-opted for advertising efficiency. The complex and opaque digital ad trading ecosystem means that ad tech charges and even media agencies have been captured in the periphery of this inquiry.

## So what's next?

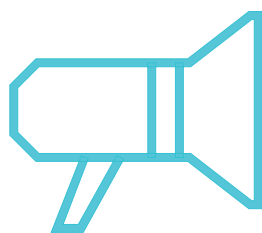
Whilst the government will determine the changes to privacy law and competition regulations, as an industry we need to ensure we have the checks and balances in place so we not only meet the law but also hold ourselves to certain ethics. We have a long history of self-regulation for this reason. In this report we have highlighted the areas you, the industry professionals, see as priorities.

There was never a more pertinent time to discuss what elements of self-regulation we can and should improve on. We value your input - feel free to share this study and also to contact us with your thoughts on this important topic.

## Josanne Ryan

CEO Audited Media Association of Australia  
[josanne.ryan@auditedmedia.org.au](mailto:josanne.ryan@auditedmedia.org.au)





## We ask & listen

This study is about you, the industry: the marketers with the budgets and media agencies that do the planning and buying.

This year we had 588 participants – with the majority comprised of an even mix of client-side marketers and agencies (the focus of our analysis) plus some media brand and ad tech professionals.

### **Across all participants:**

42% Senior execs, C-suite, GM or MD

38% Middle management

19% Junior

All are involved in digital, with almost half (46%) in a digital-focused role (over 50% of their time spent on digital). Online survey with all data collected between 17 May - 9 June 2019 and analysed by 3rd party research agency: The Insights Grill.

[www.insightsgrill.com](http://www.insightsgrill.com)

**“Business ethics need to be given more importance in the industry today”**

- MARKETER



## Our why...

Trust is the invisible thread of influence that sits within media buying decisions - every day we all make decisions on a level of trust.

Our WHY is that we exist to deliver accountability and transparency in the media and ad trading eco-system, because a more trusted environment is better for marketers, agencies and consumers.

Importantly, the industry has told us that media spends also benefit.

**86%**  
**Agree**

**"Trust = Money**  
**When there is trust there is**  
**more willingness to spend."**



## You told us...

"There are enough regulations out there – but nothing that builds the basic, unified industry approach."

- MARKETER



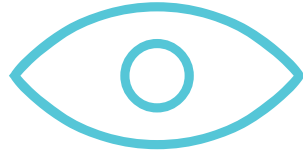




---

CONTEXT:

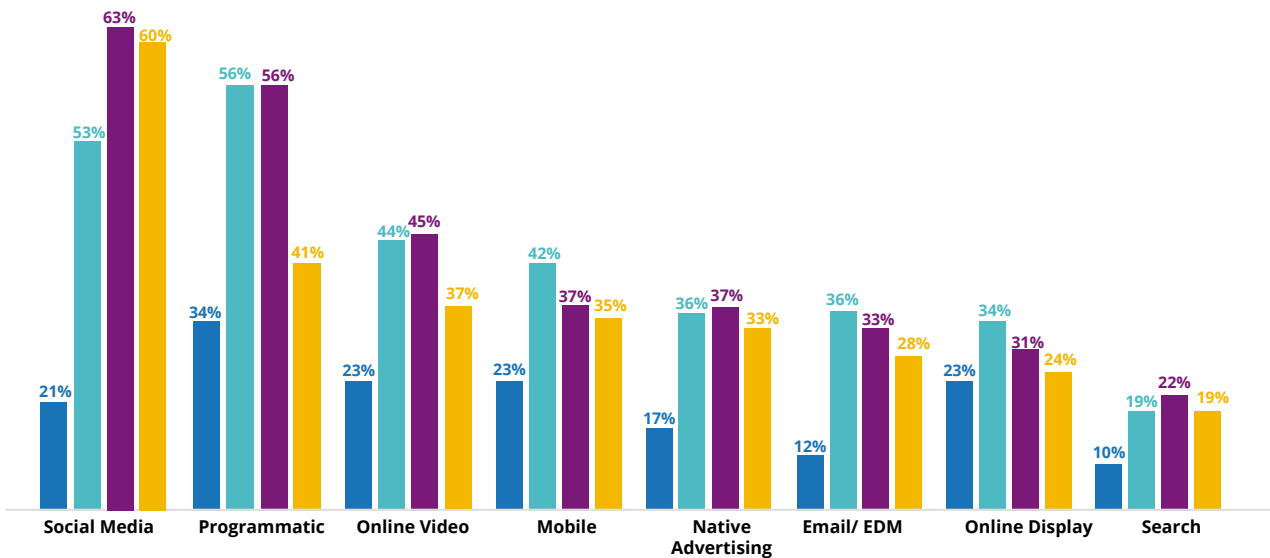
# The industry trust update on digital



## Over the last four years we have noted the growing concern over social media and programmatic

Some improvements in trust year on year for all channels. Are we doing better or is our increasing familiarity with these digital channels driving the shift?

**We asked:** Which, if any, advertising media below need more oversight to ensure adoption of best practices to build more industry trust?





Base: 2016 n=315, 2017 n=233 2018 n=323 2019 n=588



## Marketer & agency concerns differ

All agree Social Media has the biggest trust issues. Programmatic still sits second on the radar and it has the biggest variance between the two groups - agencies are twice as likely as marketers to indicate it needs more oversight to ensure best practice.

**We asked:** Which, if any, advertising media below need more oversight to ensure adoption of best practices to build more industry trust?

	 MARKETER	 MEDIA AGENCIES
Social Media	65%	60%
Programmatic Trading	27%	54%
Online Video / Streaming	34%	40%
Mobile	34%	34%
Native Advertising / Brand Integrations	26%	39%
Email Marketing / EDM's	40%	22%
Online Display (not programmatic)	26%	24%
Search	25%	16%
Other	2%	4%
None of the above	1%	2%

Base: N= Marketers n=217 Media Agencies n=224

## You told us...

"We need more oversight into programmatic inventory and trading, especially as we're moving above the line channels like TV and OOH into the programmatic field."

- MEDIA AGENCY







## Programmatic

Trust in programmatic ad trading has increased with a net 15% fewer saying it needs more oversight to build industry trust.

Looking at the split of agencies versus marketers it's evident that both have gained more trust.

Agencies have traditionally been the group to say it needs more transparency - this trend continued with over half indicating it needs more oversight to build trust.

**We asked:** Which, if any, advertising media below need more oversight to ensure adoption of best practices to build more industry trust?

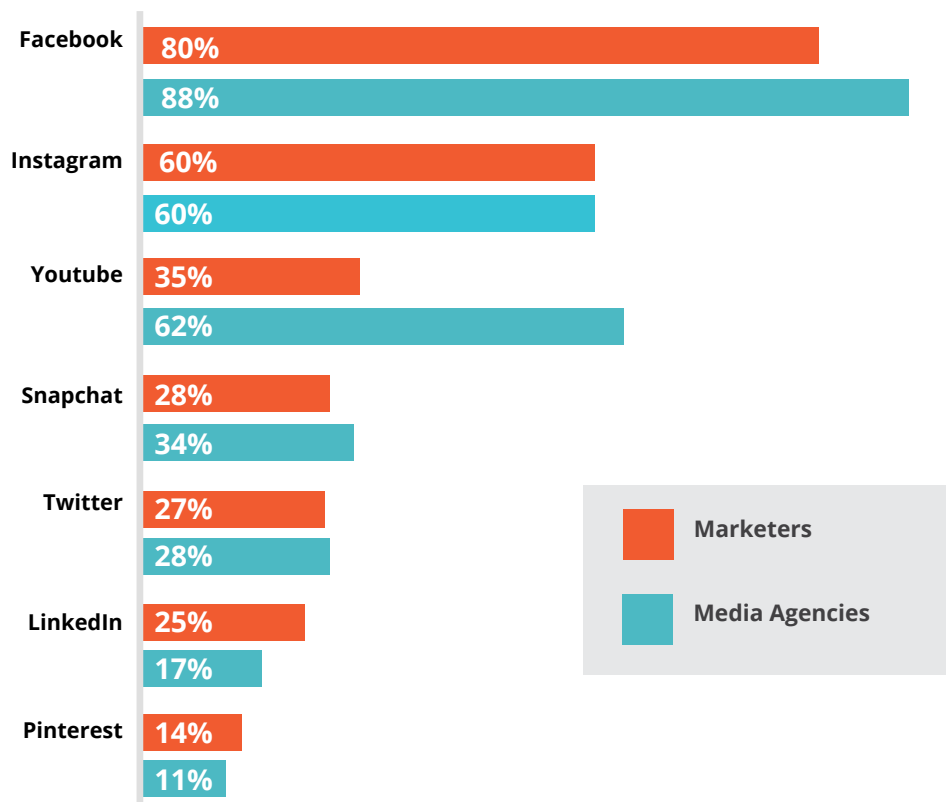
	MARKETERS 	MEDIA AGENCIES 
2018	40%	72%
2019	27%	54%
Change	-13%	-18%

Base: 2018 Marketers n=139 Media Agencies n=140, 2019 Marketers n=217 Media Agencies n=224

Programmatic is maturing and innovations such as ads.txt are working to build confidence that we can address issues but there is still more we need to do.

# Social Media – agreement that the larger platforms need oversight

**We asked:** Among the social media platforms, which do you feel need more oversight to ensure adoption of best practices to build industry trust?

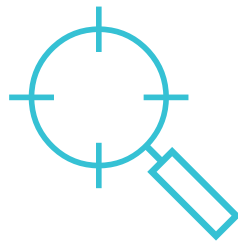


Base: N=348, the 60% who said social media needs more oversight in previous question/slide

## You told us...

“There needs to be a nation-wide standard about the marking of brand partnerships on content, social amplification, influencer content – across all platforms. Something similar to what is rolling out in the US / UK. This should relate to the wording use, and the positioning of the ‘sponsored’ ‘ad’ ‘gift’ label.”

- MEDIA AGENCY



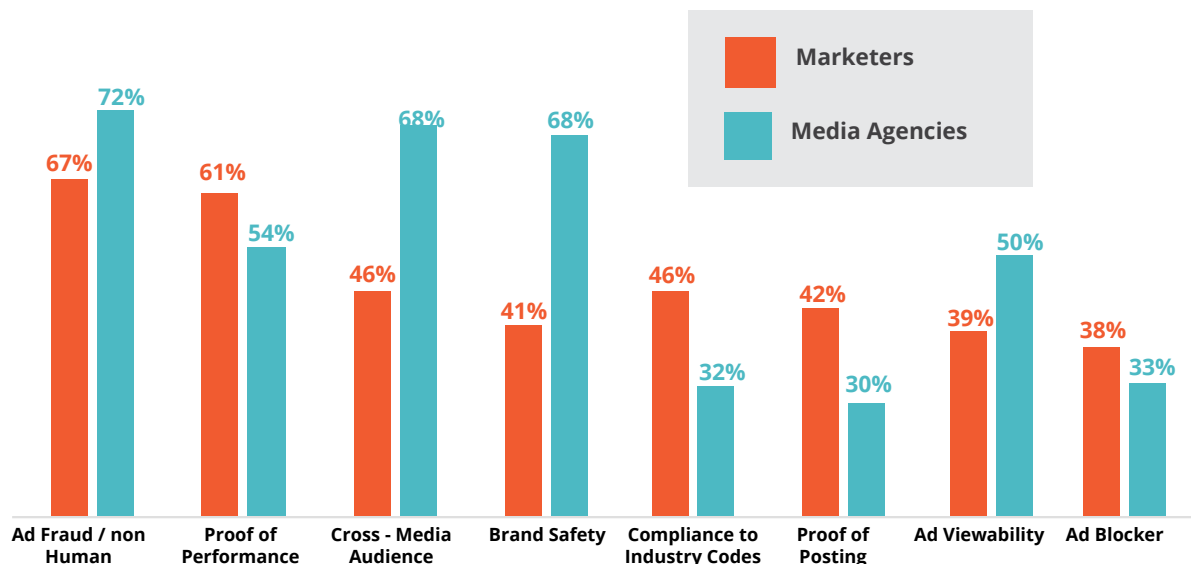
## Top industry concern is digital ad fraud

Digital ad fraud and non-human traffic concern continues, for marketers and agencies alike. There are industry initiatives to address this issue but the ongoing dilemma for the industry is how we can get ahead of this problem.

There are conflicting reports of the level of Australia's digital ad fraud but it's recognised as a global problem and predicted by the World Federation of Advertisers to grow to be in excess of USD \$50 billion globally by 2025.\*

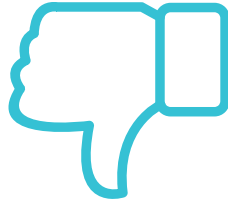
Cross media audience measurement & brand safety are the next two burning industry issues for agencies. Compared to agencies, marketers are more concerned about code compliance and proof of performance.

**We asked:** Please select up to 5 issues that you believe are most important for the industry to tackle in the next 12 months



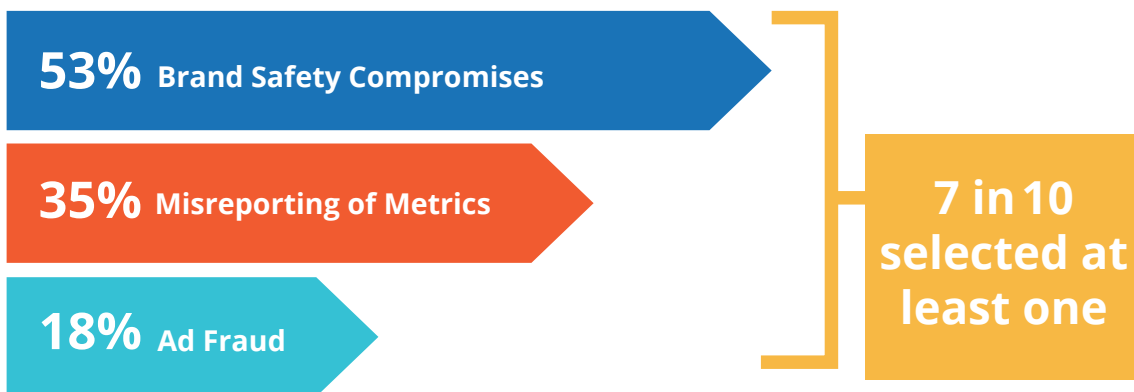
Base: Marketers n=209 Media Agencies n=213

\*WFA compendium of ad fraud knowledge for media investors, Dec 2016



## Digital marketing issues: Brand safety leads for media agencies

The majority of media agency respondents indicated that digital campaigns continue to experience negative events. In fact, over half had experienced brand safety compromises.



Base Senior/Mid Media Agencies n=154



## The result? Money down the drain

**We asked:** What was the impact of experiencing these issues?

Not surprising that the marketers and media agencies say it simply wastes marketing dollars.

**6 in 10** "Wasted ad dollars"

**3 in 10** "Upset CEO/Executives"

**3 in 10** "Loss of brand reputation /  
consumer trust"

Base: Senior/Mid Marketers and Senior/Mid Media Agencies n=177



## You told us...

"We need industry-wide consistency in metrics and benchmarking, third party verification of data, and faster reporting."

- MEDIA AGENCY











---

**INDUSTRY METRICS:**  
**Audience metrics**  
**underpin the**  
**Australian ad**  
**spend of**  
**\$17 Billion\***

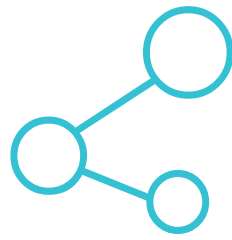
\*IAB Australia Total Australian Advertising Market, April 16, 2019

## Media measurement tools have seen an increase in trust since 2016

**We asked:** On a scale of 1-10: How much do you trust the data from each measurement provider? Zero means No Trust and 10 is Total Trust

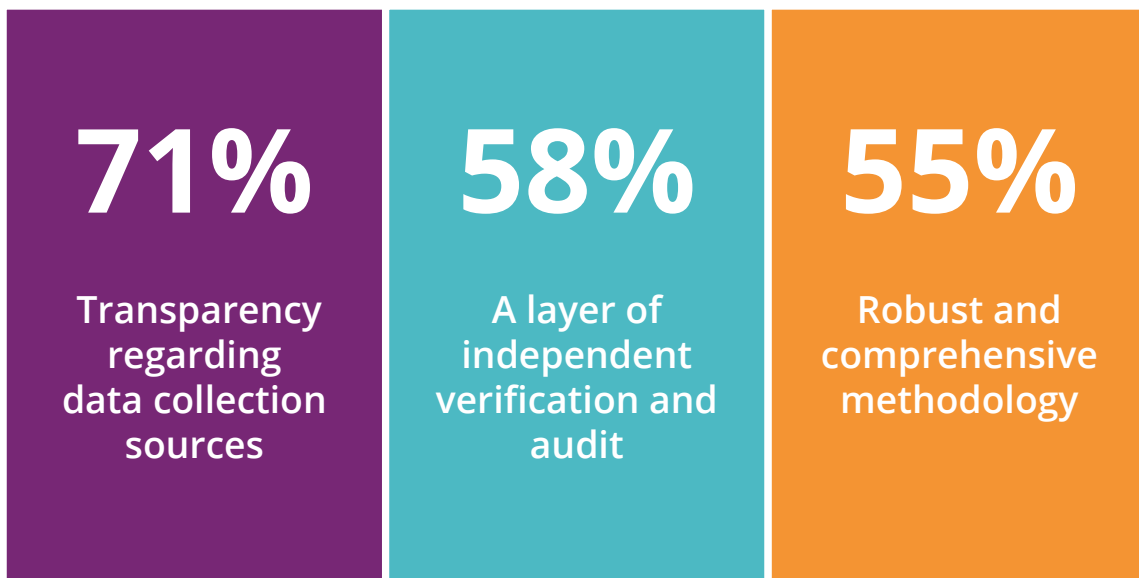
	2016	2019
	6.4	6.8
	6.4	6.8
	6.5	6.7
	5.6	6.5
	5.5	6.2
	5.5	5.9

Base: 2016 n=315; 2019 n= 507 Filtered by people who use each of the tools/their data



## So what factors build trust & confidence?

**We asked:** What factors do you consider most important in building trust and confidence in audience metrics?



Base Total sample n=498

**Trust Solution – transparency and rigour builds trust.**

## You told us...

"Introduce a code of conduct with teeth. If you operate outside it you lose your accreditation. Then clients would be able to verify if their digital partners are legitimate operators."

- MEDIA AGENCY







---

**REGULATION:**

# What does the industry think?

## You told us...

"Create an independent third-party body to develop a set of guiding principles and regulations which would protect consumer data and lead to more transparency in ad buying in all media companies."

- MARKETER



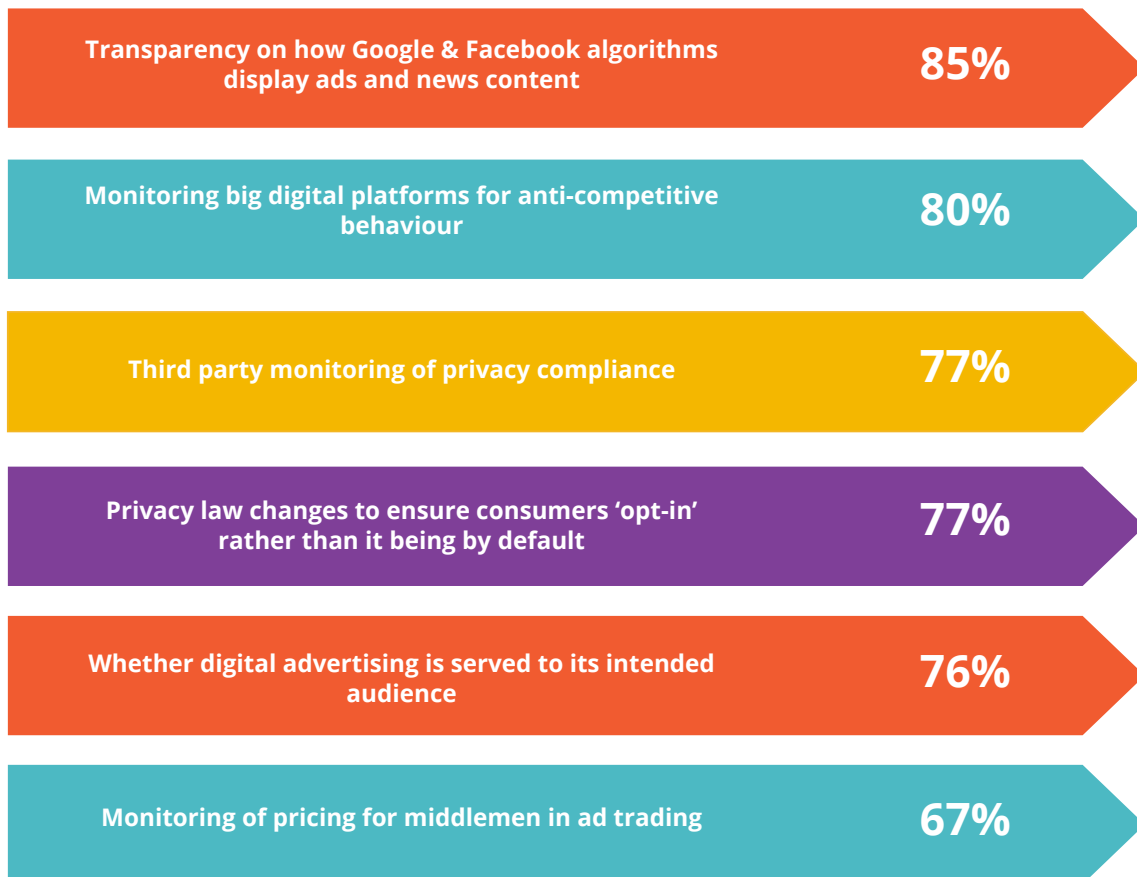


# ACCC Digital Platforms Inquiry (DPI) – industry agreement

The respondents who indicated they were familiar with the ACCC DPI Preliminary Report agreed with a need for greater transparency and monitoring of Google and Facebook, privacy law compliance and greater transparency in digital ad trading.

## THE ACCC DPI PRELIMINARY REPORT RECOMMENDATION

% who say there is a medium or high need for it



\* The ACCC DPI Preliminary Report was released in December 2018 and foreshadowed most of the recommendations included in the DPI Final Report July 2019.

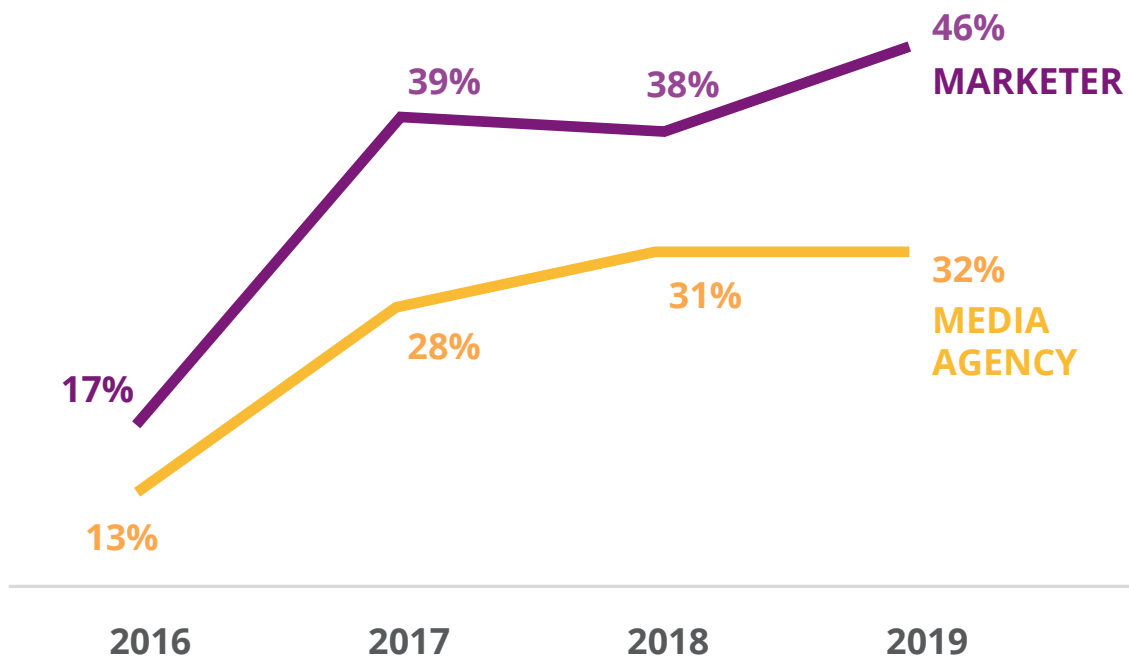
Base: Those with some understanding of the ACCC DPI preliminary report, n= 146



## We've been tracking how important the industry sees "compliance to media industry codes and best practices"

### It's trending up especially with marketers

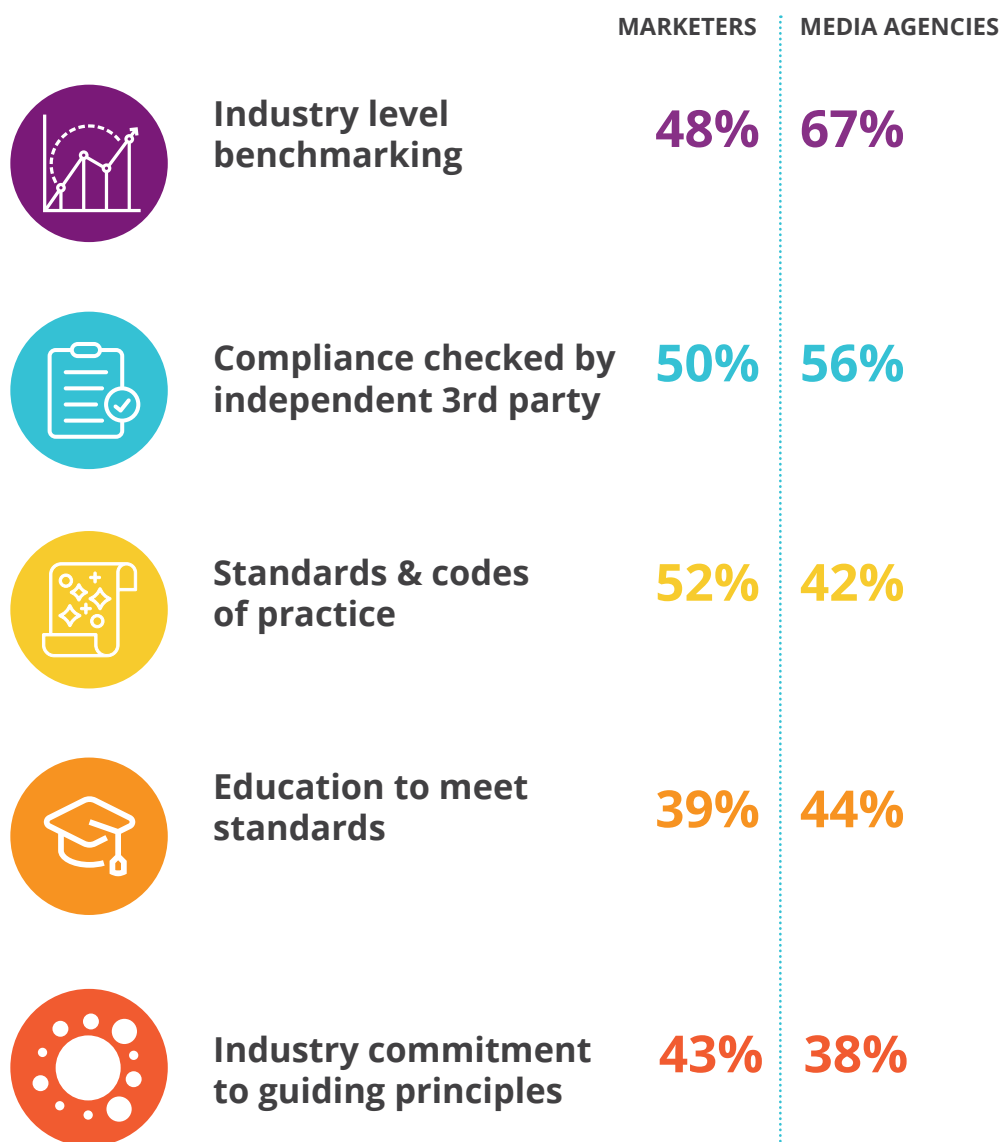
**We asked:** "Compliance to media industry codes" as a top issue to tackle in the next 12 months" - % agree



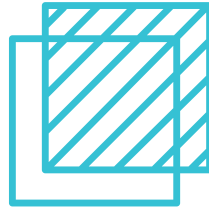
Base: Total samples 2016 n=315, 2017 n=230, 2018 n=308, 2019 n= 560

# Self-Regulation – benchmarking & compliance matter

**We asked:** When thinking about industry self-regulation, which aspects do you think are most important? Select up to 3:



Base: Senior / Mid Marketers n=117 Senior / Mid Media Agencies n=149



## Transparency issues for the industry

**We asked:** What do you consider the key industry transparency issues in 2019?



Base: Total sample n=509

### What this means...

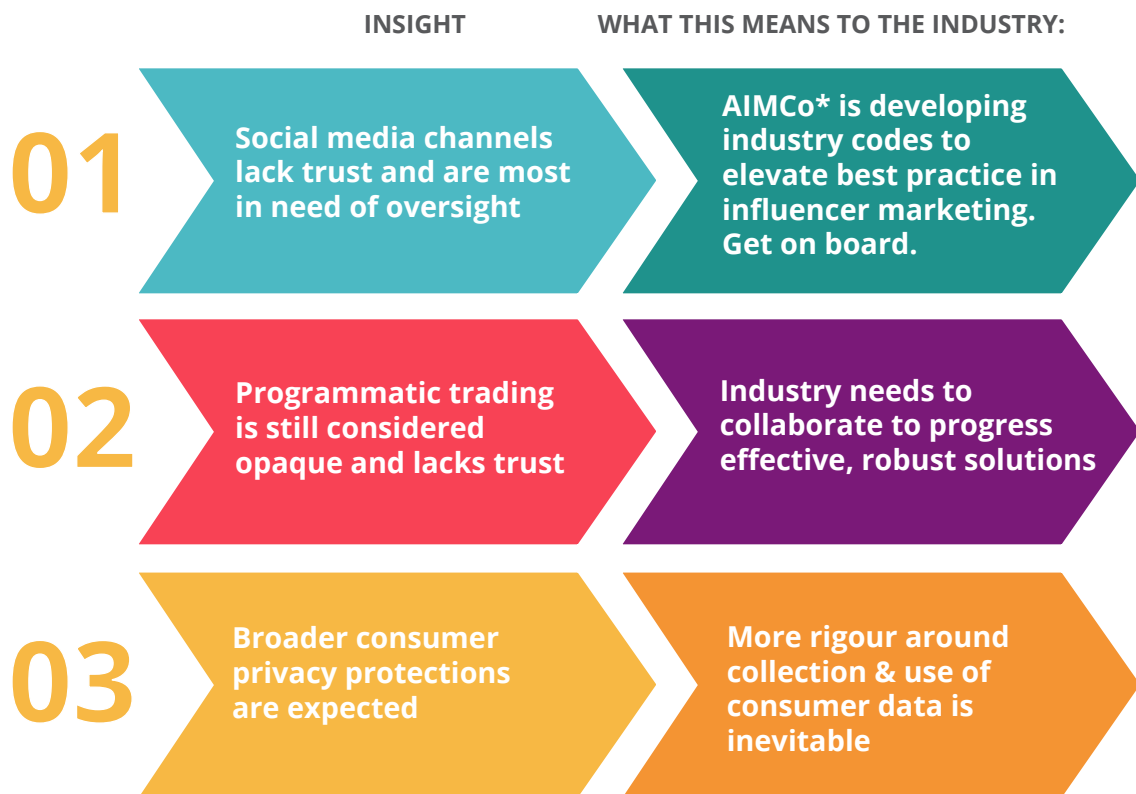
1. The collection of consumer data, the level of ad fraud and the opacity of the digital trading ecosystem remain the top issues the industry needs to address.
2. Feedback confirms that more robust self-regulation including compliance measures will build trust and reduce risk.

---

**Trust Solution – transparency and rigour builds trust.**



## Looking ahead....



The AMAA continues to work with the industry to support best practice and accountability in media ad trading.

\* Australian Influencer Marketing Council established September 2019



# #TRUST MATTERS

The AMAA is committed to working with marketers, agencies and media partners to advance trust, accountability and best practice across the advertising trading ecosystem.

## FOR MORE INFORMATION CONTACT:

[www.auditedmedia.org.au](http://www.auditedmedia.org.au)

02 9954 9800

[marketing@auditedmedia.org.au](mailto:marketing@auditedmedia.org.au)

6/127 York St, Sydney,  
NSW 2000



**Audited Media**  
Association of Australia

