



DoubleVerify

Global Insights

2018

DV
DoubleVerify

Media quality – the #1 issue continuing to impact digital performance today.

Brand safety, digital ad fraud and viewability continue to challenge digital marketers. The stakes are high as advertisers demand clarity and confidence in the content and quality of the online platforms they are investing in.

This report dives into a market-by-market analysis of the challenges facing global marketers with insights from DoubleVerify on the current and future state of media quality.

KEY INSIGHTS OVER THE PAST YEAR

Brand Safety

incidents
increased by

25%

Mobile ad fraud

increased by

800%

as apps take over
media budget.

Viewability

improved

DISPLAY
52% → 56%

VIDEO
59% → 63%

but is still not up
to expectations.

Fake news, violence and hate speech have brought brand safety back to the forefront.

What is suitable for brands has evolved over time, leading to higher sensitivity and therefore surpassing fraud as the primary media quality concern.

The content types that marketers want to avoid most has changed.

2013

1. Malware
2. Spam
3. Adult Content



2018

1. Adult Content
2. Extreme Violence
3. Hate Speech

Brand safety violations overall have increased

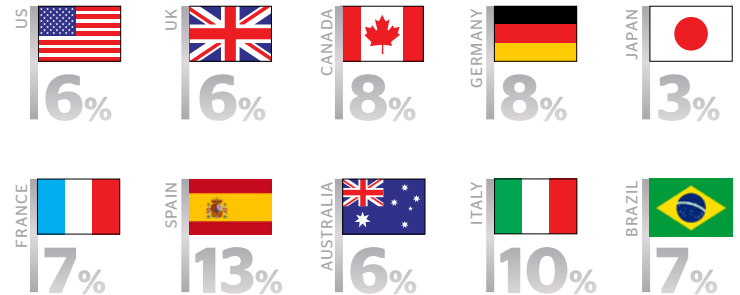
↑ 25% over the last year

- Extreme Violence and Hate Speech nearly tripled
- Brand safety violations spike by 50% following major news coverage of violence

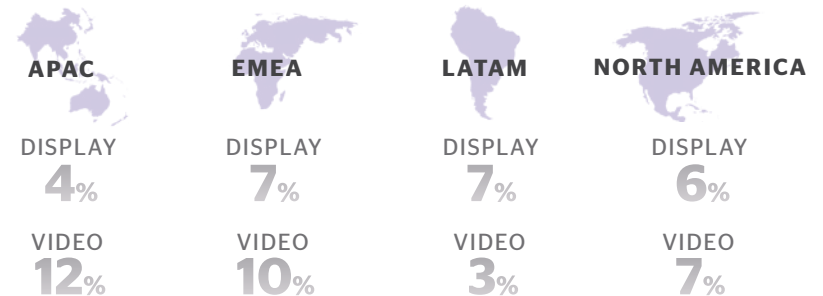
FAKE NEWS is 70% more likely to be shared than genuine stories.*

*Source: 2018, The Spread of Fake News by Soroush Vosoughi, Deb Roy and Sinan Aral

BRAND SAFETY ISSUES VARY BY COUNTRY...



...AND BY MARKET

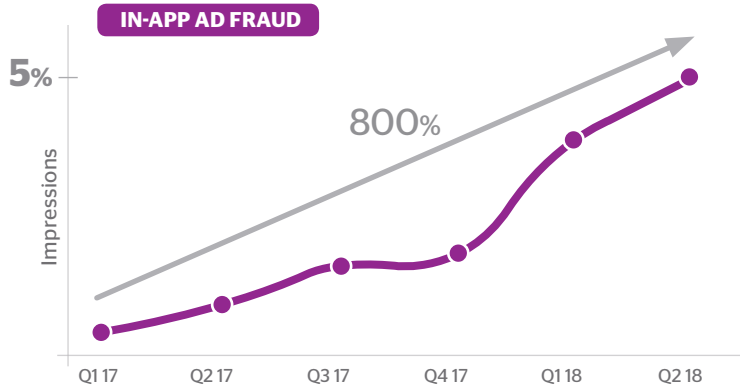


Fraud has gone mobile... while overall ad fraud has declined.

**Fraud has followed the ad dollars
→ to MOBILE.**

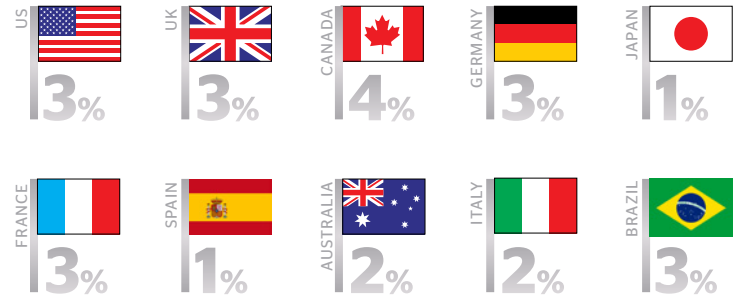
↑ 800% INCREASE
in-app ad fraud on mobile devices in the past year.

In-App fraud is the fastest growing ad fraud issue in 2018, including new areas such as app spoofing, hidden ads and mobile hijacked devices.

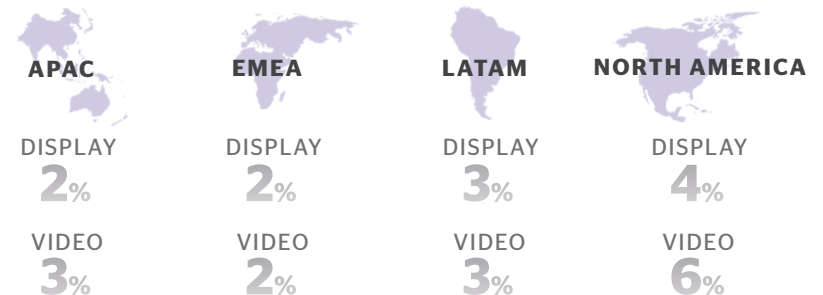


* Q2 18 data based on partial quarter

OVERALL AD FRAUD RATES BY COUNTRY



FRAUD RATES BY MARKET



Viewability continues to improve, but short of IAB standards.

DISPLAY VIEWABILITY

44%
2015 FY



56%
2018 YTD

VIDEO VIEWABILITY

35%
2015 FY



63%
2018 YTD

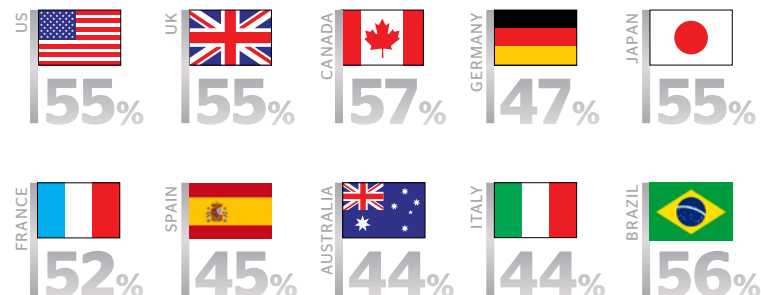
VIEWABILITY CONTINUES TO IMPROVE.

But nearly **half of media** is still out of view, despite the IAB standard of **70% or higher**.

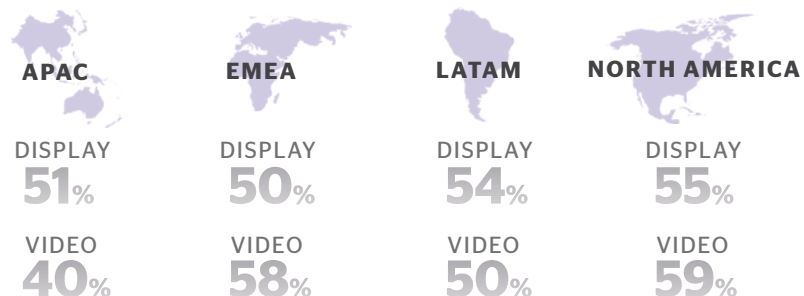
DoubleVerify continues to track a steady increase in global viewable rates.

Significant progress is being made to expand third-party viewability measurement across social platforms, in-app mobile platforms, and OTT/CTV. We expect viewability to stay at the forefront of digital marketer concerns.

DISPLAY VIEWABILITY BY COUNTRY



VIEWABILITY BY MARKET



Trends to watch

A DIGITAL MARKETER'S 2019 GUIDE

TRUST IN AN AD-SUPPORTED INTERNET IS ERODING

Fake news, digital ad fraud and data privacy are pressing issues threatening the trust and confidence in an ad-supported internet. While advertisers continue to fight for transparency—consumers who have enjoyed positive, emotional connections with their brands online—are at risk of turning off. Stakeholders will expect even greater clarity and accountability in the quality of the online platforms and content that they invest behind.

FAKE NEWS & FALSE CONTENT OUTPERFORM THE TRUTH

The glut of fake and unsubstantiated content will likely continue. Social media platforms have become effective targets for pushing unsupported headlines that users are quick to circulate. Fake news and false stories reach more people and spread 6x faster than genuine content.* Technology-driven solutions are essential for advertisers to validate the integrity of digital content at scale.

*Source: 2018, The Spread of Fake News by Soroush Vosoughi, Deb Roy and Sinan Aral

FRAUD FOLLOWS THE MONEY

Third-party verification has successfully reduced desktop digital ad fraud to low single digits. Now with mobile apps commanding more than 50% of a consumer's time online, advertiser demand for quality mobile inventory has swelled. In return, we've seen an 800% increase of in-app ad fraud. Expect that in-app ad fraud will continue to accelerate as fraud follows the money.

METRICS THAT MATTER

New standards for marketing performance are emerging as current industry norms are no longer sufficient. Digital metrics are evolving, from measuring the quality of an ad placement to also evaluating the quality of consumer engagement. Engagement metrics encompass richer insights into how consumers interact with online promotion and are important predictors of their likelihood to transact.

DoubleVerify is powering the new standard of marketing performance to achieve clarity and confidence in your digital investment.



www.doubleverify.com

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