



IAB Europe poll: Brand Safety Developments in Europe January 2020

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IAB Europe's Brand Advertising Committee conducted a survey in November 2019 to ask industry experts for their views on how brand safety has been tackled in 2019 and determine what action needs to happen in 2020.

Whilst there are lots of studies which look at consumer views, the BAC wanted to find out what is actually happening from the advertising industry experts.

The results highlight how seriously the industry is taking brand safety, and show how the ecosystem has changed in the last couple of years to place more emphasise on ensuring brand safe environments.

- Fieldwork: November, 2019
- Responses: 90

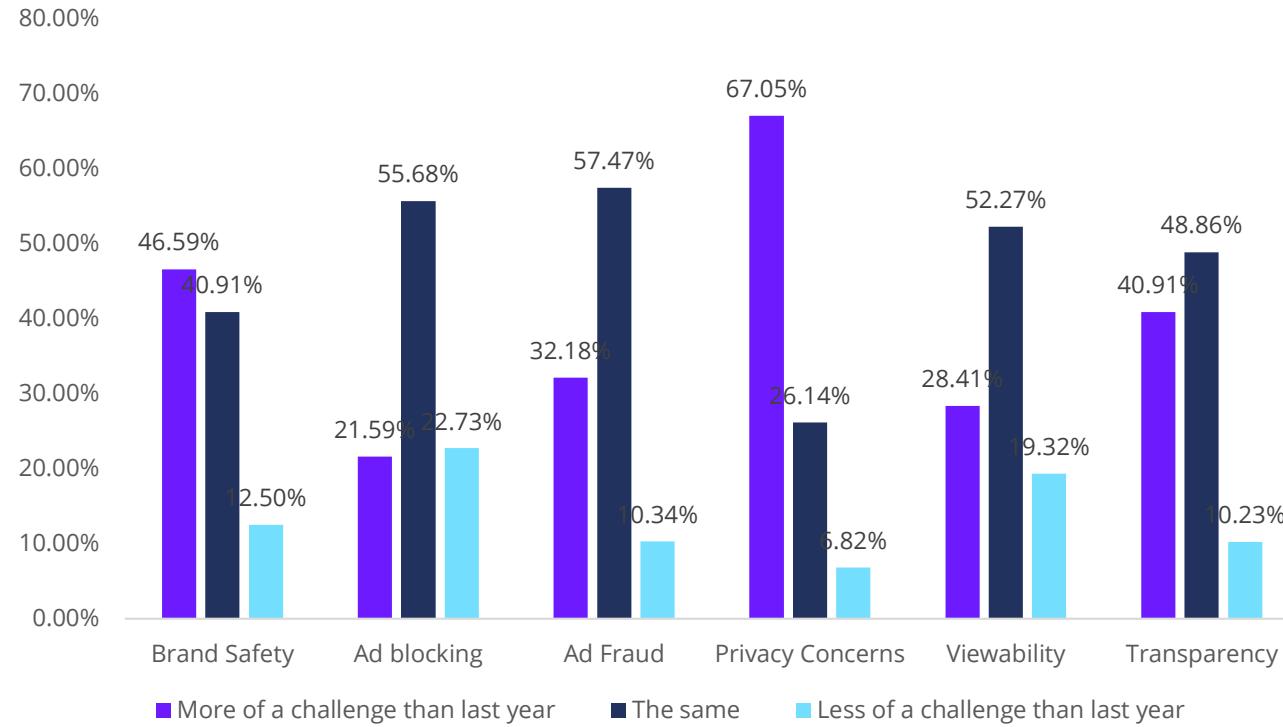
Key findings

- The results reveal that brand safety and privacy remain priorities, with 77% of respondents saying that brand safety was a key priority.
- 57% of respondents agreed that brand safety was more of a challenge than in previous years, citing increased understanding and knowledge of brand safety by advertisers.
- When outlining how the buy-side protected against brand safety concerns, the Brand Safety Poll indicates that blacklists and keyword targeting remain the dominant methodology.
- A common theme within the Poll was the ongoing need for industry education, with wider discussion about solutions, differences, options, further education and knowledge exchange cited as important in 2020.

Number of respondents: 89

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Are the following industry challenges more or less of a challenge than last year?



Brand safety and privacy concerns were the only two that respondents feel are more of a challenge than last year.

Ad blocking, ad fraud, viewability and transparency were all considered the same concern as last year.

- 46.6% said brand safety is more of a challenge than last year. Only 12.5% disagreed and said less
- Only 21.6% said ad blocking is more of a challenge than last year. Majority 55.7% said it was the same.
- 32.2% said ad fraud was more of a challenge than last year. Majority 57.5% said it was the same.
- 67% said privacy concerns were more of a challenge than last year. Only 6.8% said it was less of a challenge.
- 28.4% said viewability was more of a challenge than last year. Majority 52.3% said it was the same.
- 40.9% said transparency was more of a concern than last year. The majority 48.9% said it was the same

Number of respondents: 89

With regards to brand safety, please answer why you feel it is: More or less important

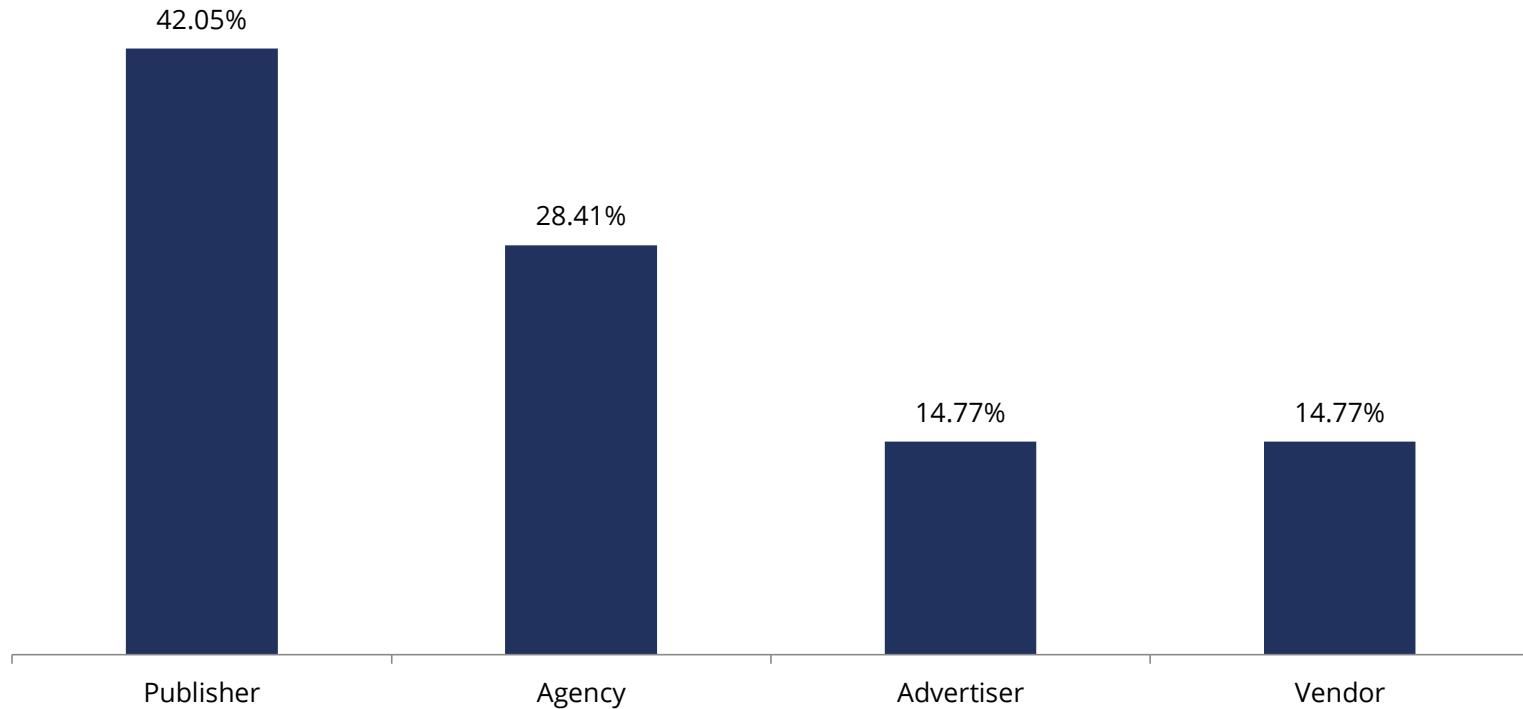
38 responses on why it is more of a challenge. Focused on:

- Continuation from last year - brands still fear a safety breach
- Advertisers want more information on where their adds are running
- Advertisers applying more pressure, becoming more stringent and conscious
- The proliferation of fake news, rise of live and real-time generated content
- Public discussions on social media, coverage by the media
- Brand safety is too subjective to be easily regulated
- Brand safety definitions, methodologies, KPIs are not consistent - need more definitions and education
- More money and companies every year which means more fraud
- Still lack of tools and familiarity of what's available in the industry

20 responses on why it is more of a challenge. Focused on:

- Tech and the tools available have increased
- Awareness of issue meant that the industry took specific actions to tackle them
- Better control of inventory and better contextual targeting capabilities
- More hype this year but more control in place

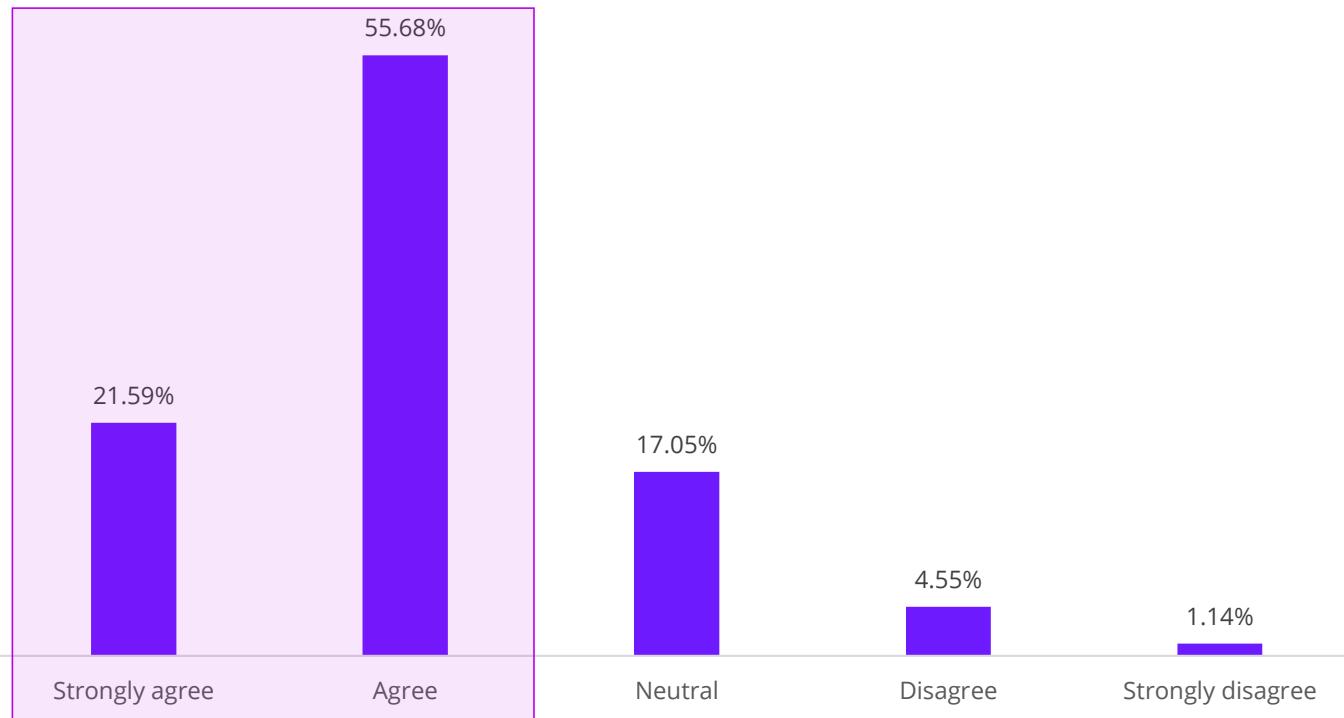
Which stakeholder group is most responsible for ensuring brand safety?



Number of respondents: 88

Please state the extent to which you agree or disagree with the following statements about brand safety:

Brand Safety was a key priority for the industry in 2019



77.3% agree (21.6% strongly agree) that brand safety was a key priority for the industry in 2019

Only 5.6% disagreed

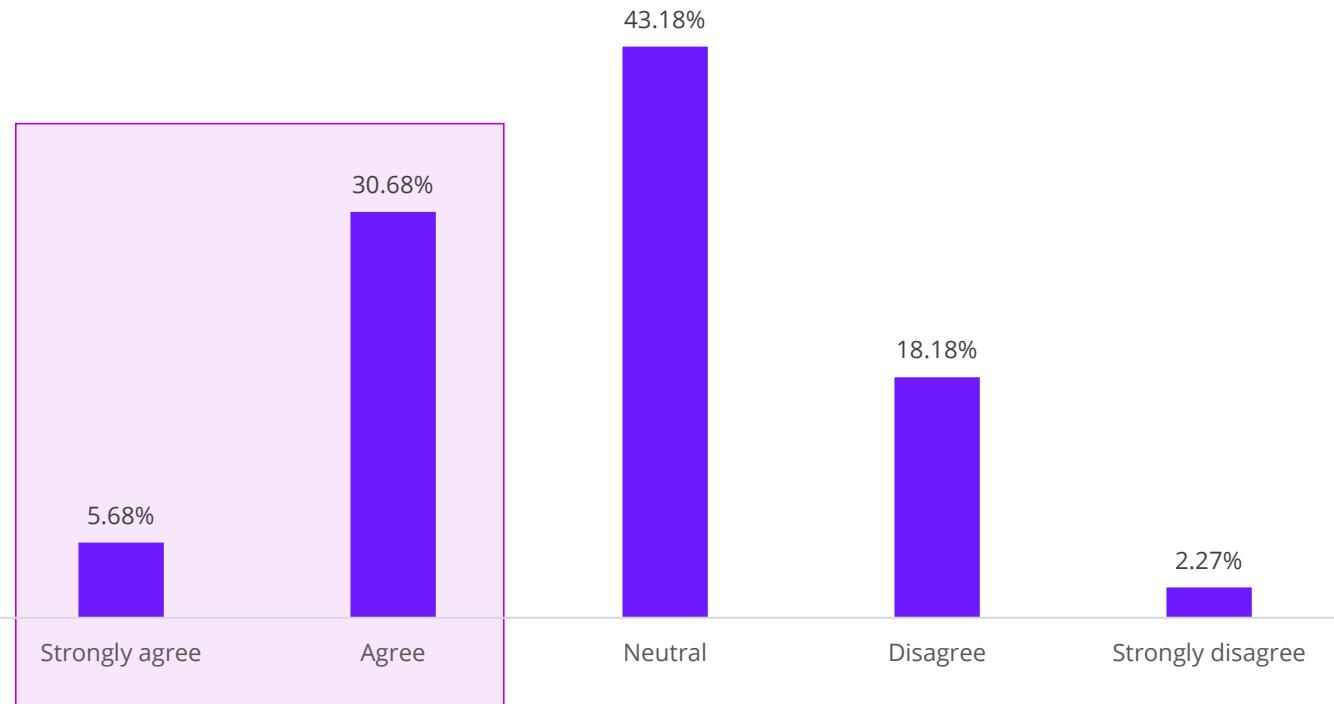
Number of respondents: 89

Please state the extent to which you agree or disagree with the following statements about brand safety:

The industry has done a good job of tackling Brand Safety in 2019

36.4% agree the industry have done a good job of tackling Brand Safety in 2019.

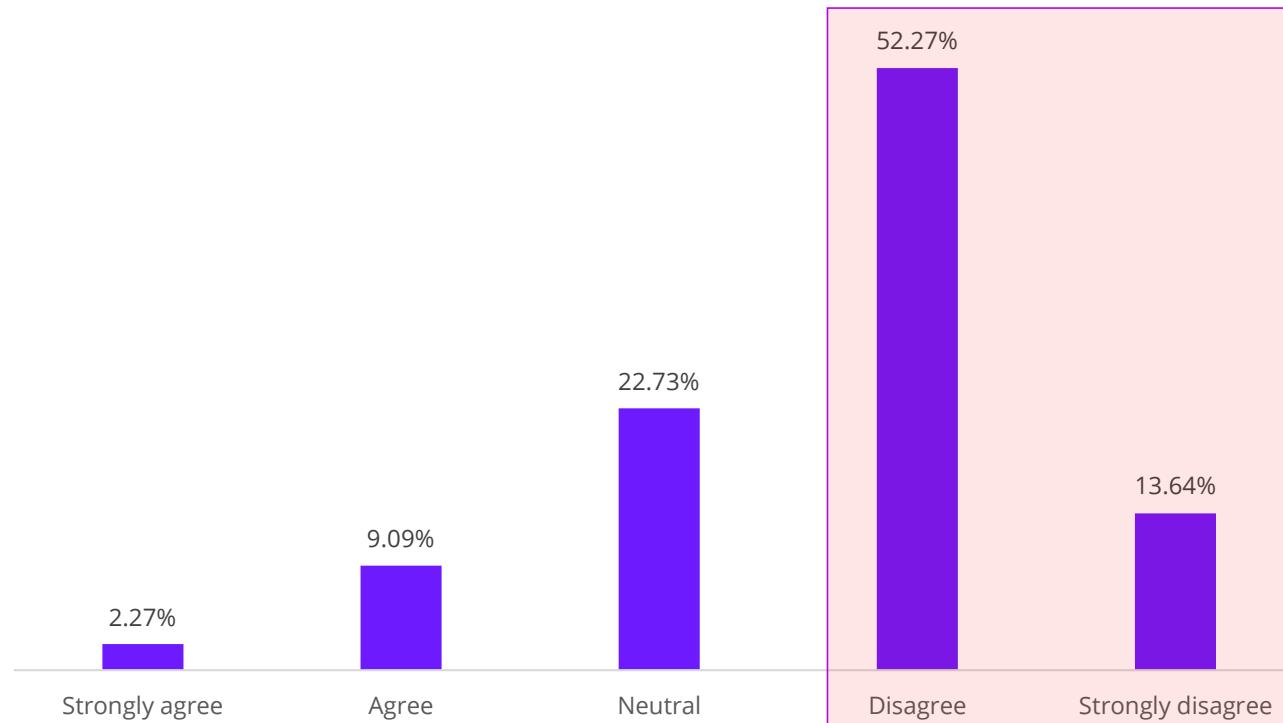
Only 20.5% disagree



Number of respondents: 89

Please state the extent to which you agree or disagree with the following statements about brand safety:

Brand Safety will be less of a challenge in 2020

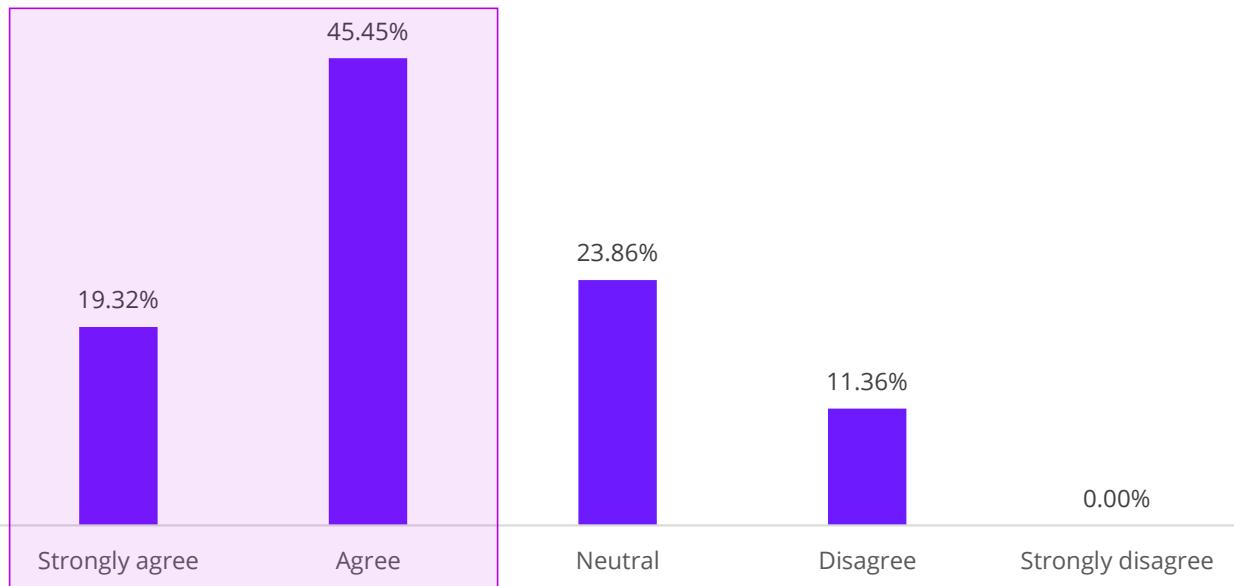


65.9% disagree that Brand safety will be less of a challenge in 2020.

Number of respondents: 89

Please state the extent to which you agree or disagree with the following statements about brand safety:

Tech innovations are helping to solve Brand Safety concerns



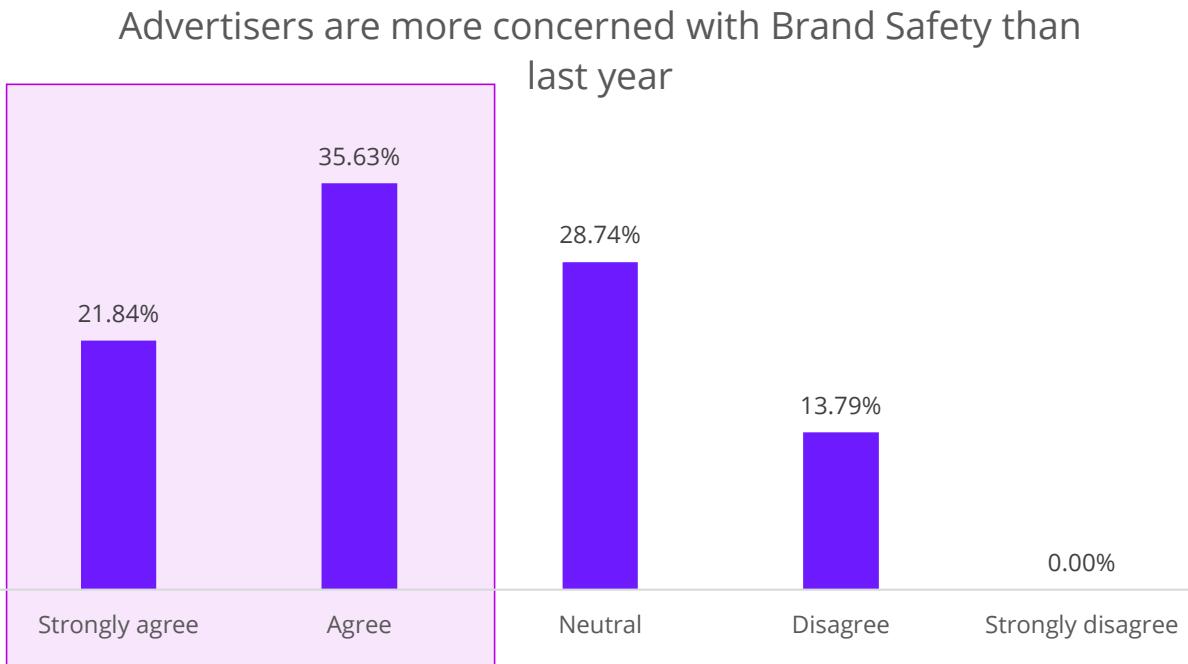
64.8% agree that Tech innovations are helping to solve Brand Safety concerns

Only 11.4% disagree.

Number of respondents: 89

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Please state the extent to which you agree or disagree with the following statements about brand safety:



57.4% agree that advertisers are more concerned with Brand Safety than last year

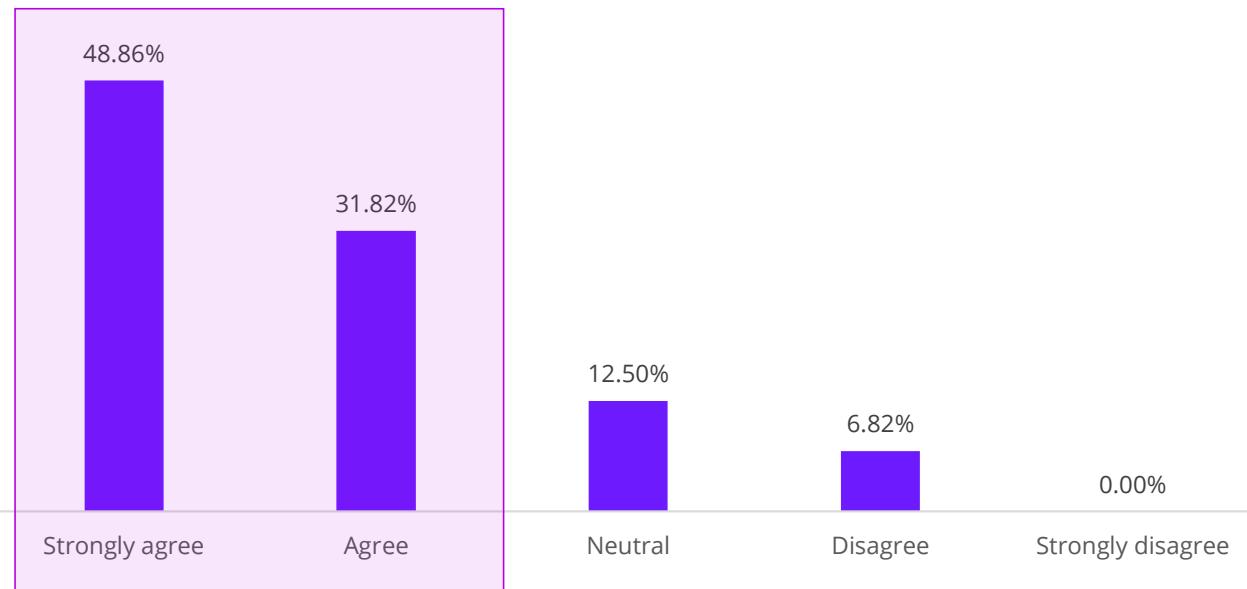
Number of respondents: 89

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Please state the extent to which you agree or disagree with the following statements about brand safety:

Ensuring brand Safe environments is a key part of all digital media campaigns

80.7% agree that ensuring brand safe environments is a key part of all digital media campaigns

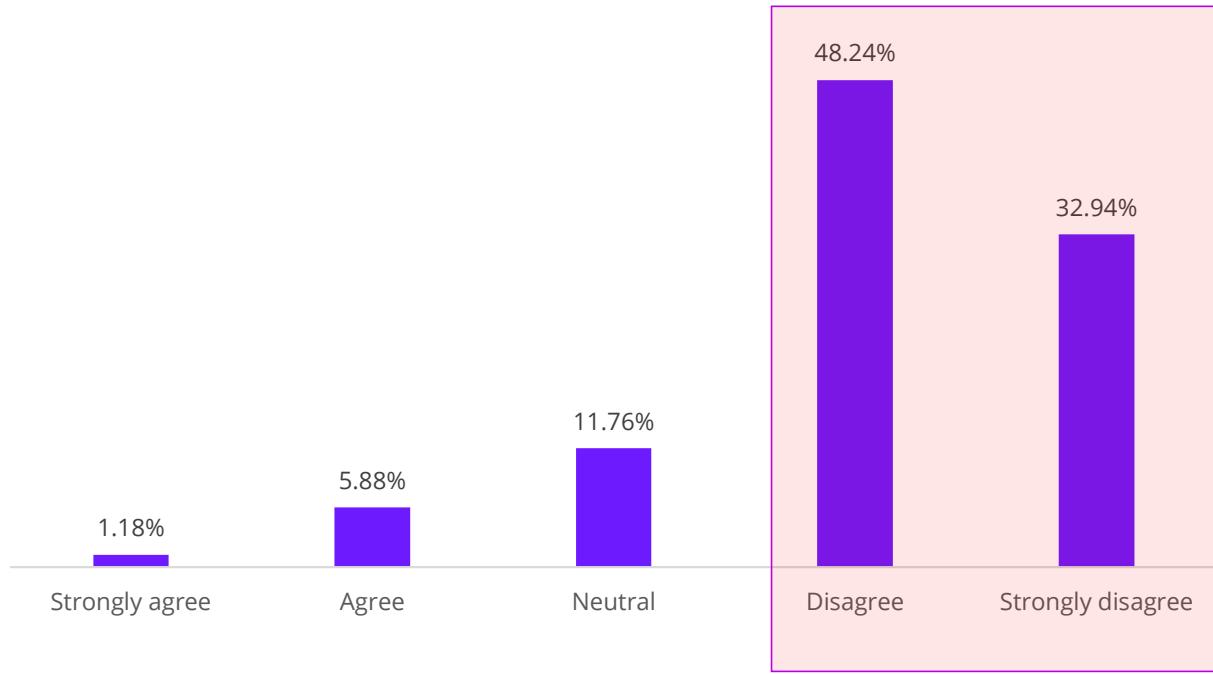


Number of respondents: 89

Please state the extent to which you agree or disagree with the following statements about brand safety:

Contextual targeting and brand safety are the same

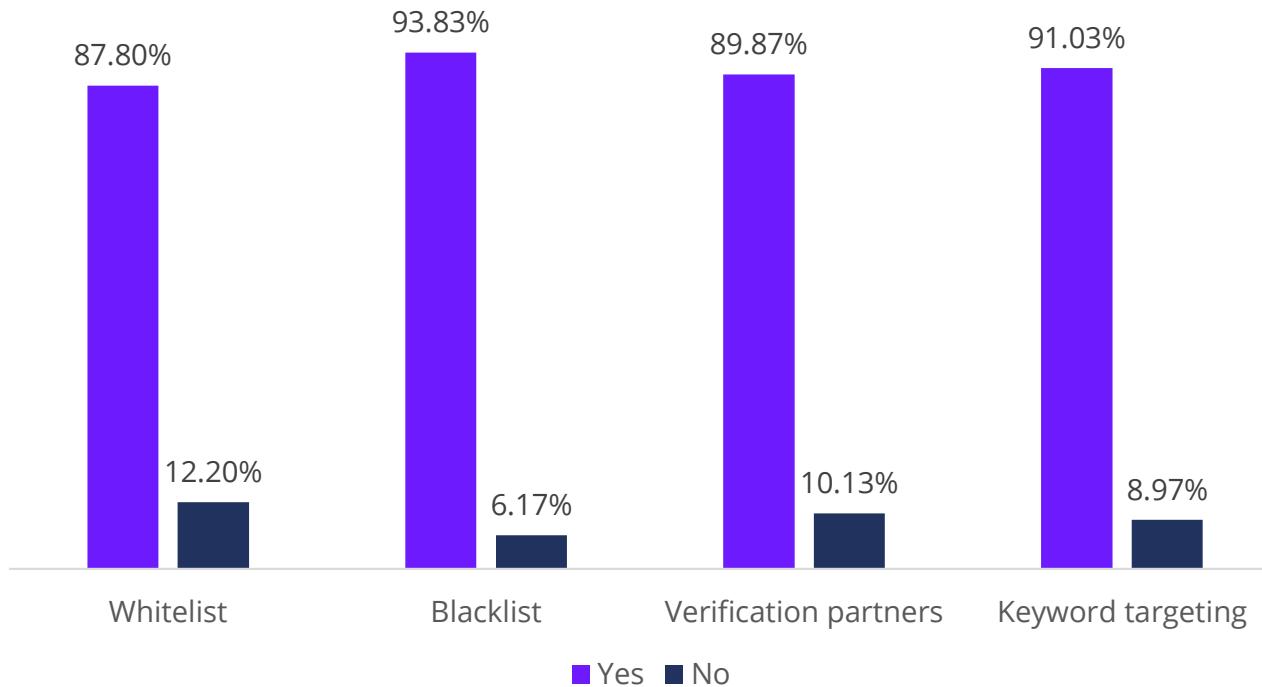
81.8% disagree that contextual targeting and brand safety are the same thing



Number of respondents: 89

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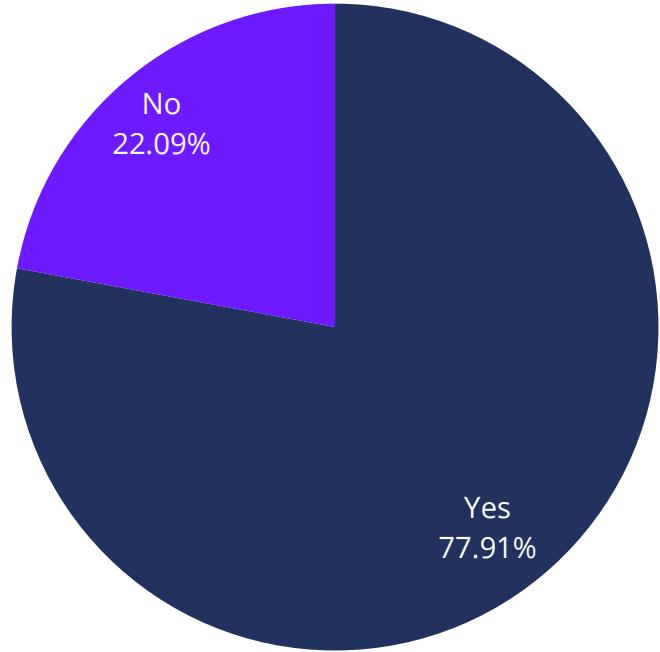
Which of the following tools does your company use to ensure brand safety?



Majority use the following tools to ensure brand safety. Blacklists were rated as the most used, followed by keyword targeting.

Number of respondents: 87

Do you think brand safety requires a bespoke approach to each client's needs?

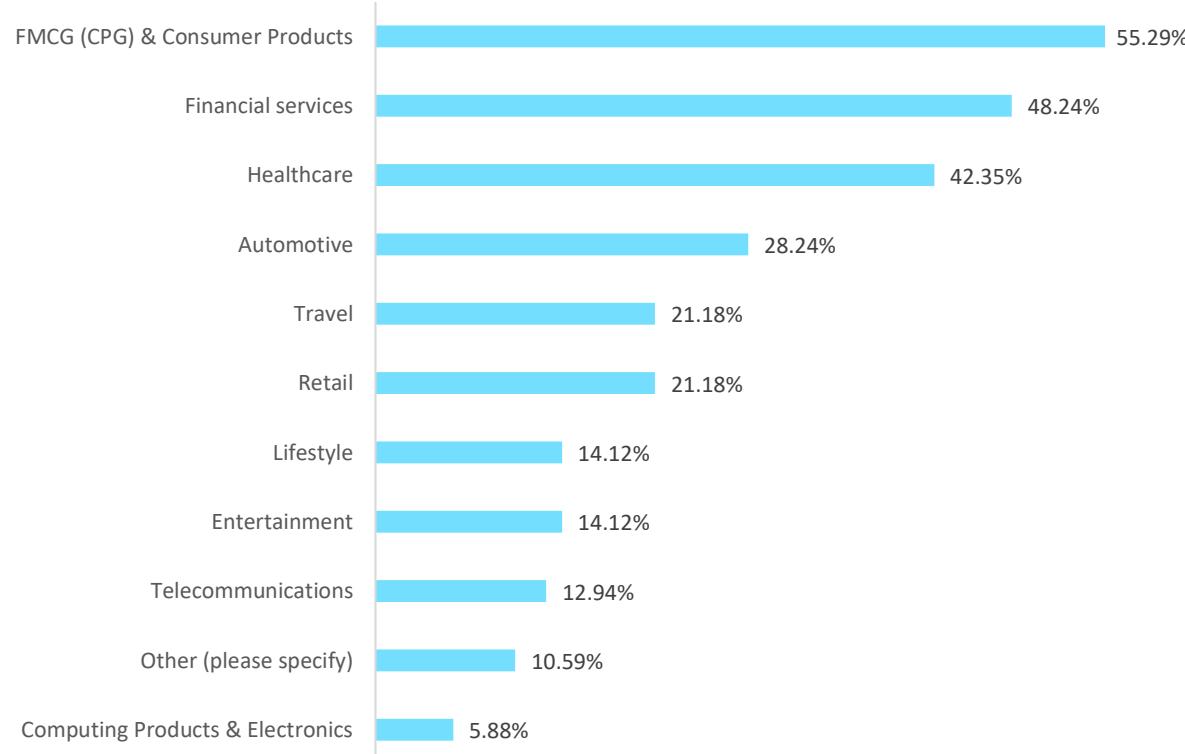


77.9% agree that brand safety requires a bespoke approach to each client's needs.

Number of respondents: 86

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Which industry vertical shows the greatest concern for Brand Safety?



FMCG was cited as the industry vertical that shows the greatest concern for Brand Safety closely followed by financial services and healthcare.

'Other' responses included Government and luxury.

Number of respondents: 85

Finally, what needs to happen in 2020 to further tackle brand safety?

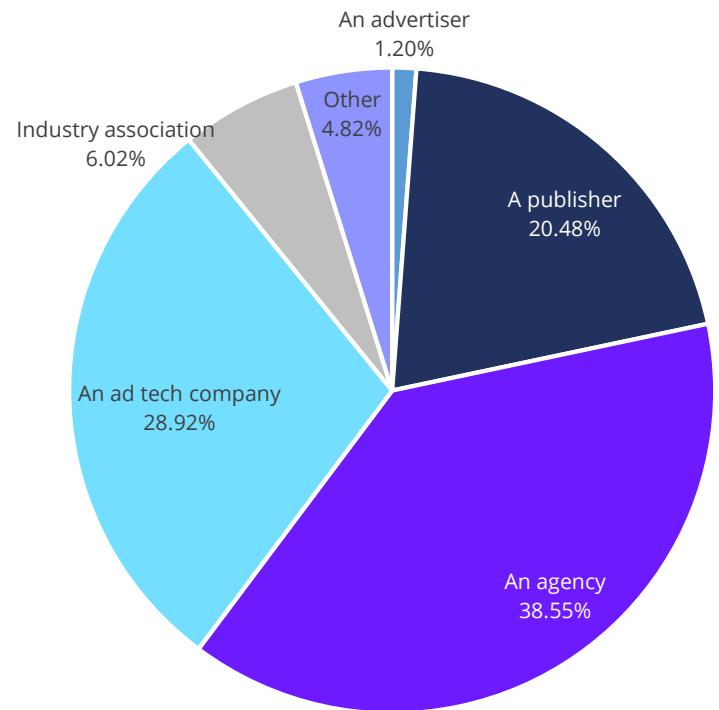
Responses focused on:

- Common standards / definitions
- Better education and discussion on the details and differences between brand safety levels (suitability), challenges
- Always on verification
- Collaboration and transparency between advertisers and tech platforms
- Better programmatic solutions
- Strong line between brand safety (edited content) and brand suitability

Number of respondents: 85

Respondent profile

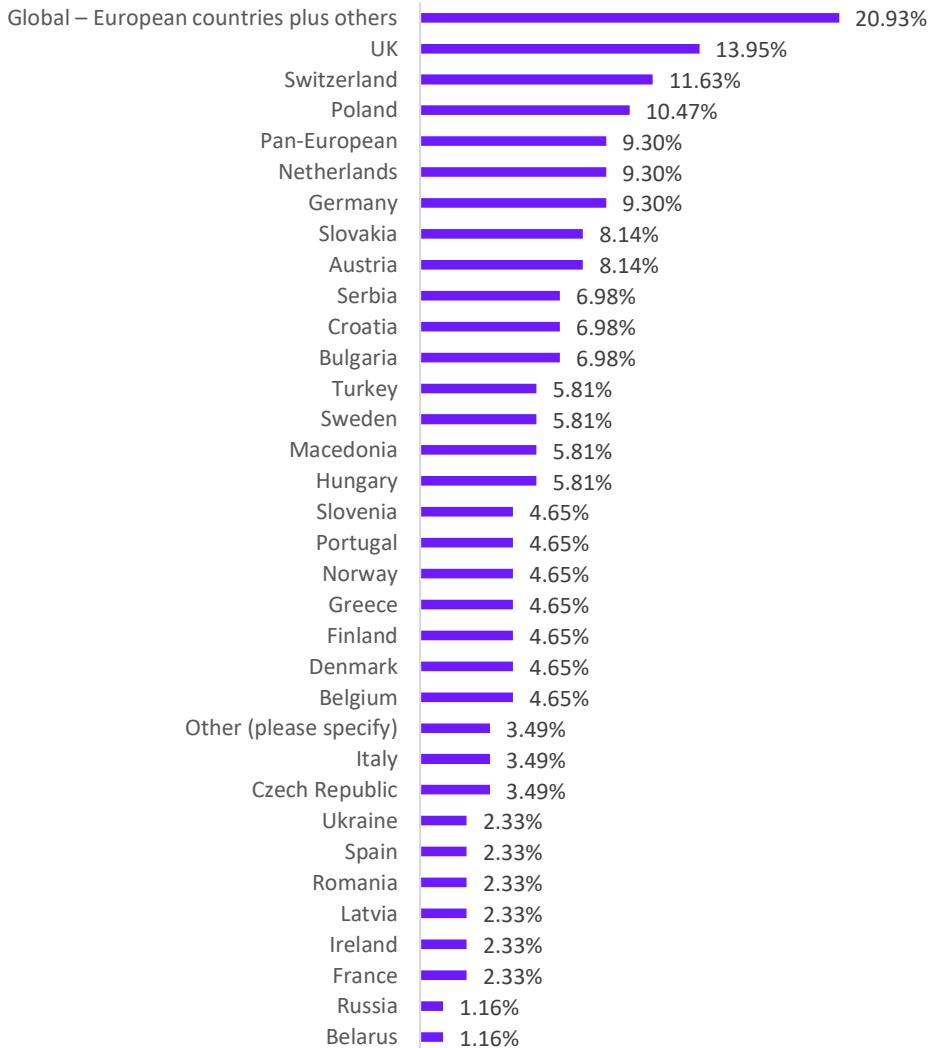
Stakeholder breakdown



Number of respondents: 85

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Region / market breakdown





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