

A stylized world map in shades of blue and teal, serving as the background for the slide.

DoubleVerify

Global Insights

2017

GLOBAL BRANDS NEED
GLOBAL SOLUTIONS

DV
DoubleVerify

Media quality – the #1 issue impacting digital performance today.

Brand safety issues are rampant.
Digital ad fraud isn't going away.
Viewability is increasing...slowly.

More than ever, global marketers
are demanding third party
measurement and transparency
across all their digital investments.

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

KEY INSIGHTS

VIEWABILITY

DISPLAY

52%

VIDEO

59%

VIEWABILITY is improving...slowly.

AD FRAUD

10%
VIDEO
FRAUD

FRAUD is still a thorn in
the industry's side with
video campaigns
2X worse than display.

BRAND SAFETY

↑ **300%***
*in ad blocking due
to **terrorism** content*

↑ **250%***
*in ad blocking due
to **inflammatory** news*

Terrorist and political events have a direct correlation with
fake news surges. The political climate matters.

* during Q1

Fake news is a global problem with local impact.

fake news

surges in politically charged climates, flooding the digital ad market with unsavory opportunities.

It is imperative for global marketers to be vigilant of current events in their local markets and tailor their media quality authentication to ensure they are protected.

Inflammatory news increases on major news days. Terrorist and political events impact volume significantly.

Italy + 75%
Germany + 16%
France + 22%
US + 10%

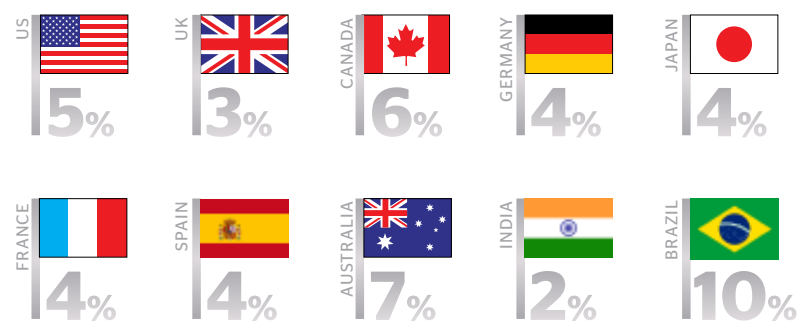
IN France

...around the 2017 election: volume more than doubled.

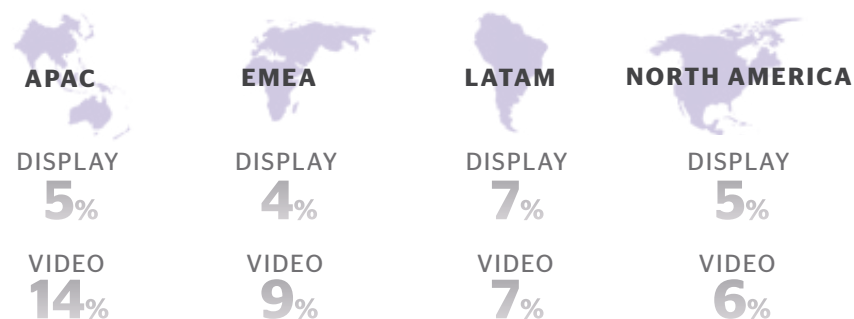
THE US

market is unique. Fake news & inflammatory political content continues to be a persistent concern. In March, DoubleVerify **blocked over 85 million ads** from serving adjacent to inflammatory news, a **250% increase** from January 2017.

BRAND SAFETY ISSUES VARY BY COUNTRY...

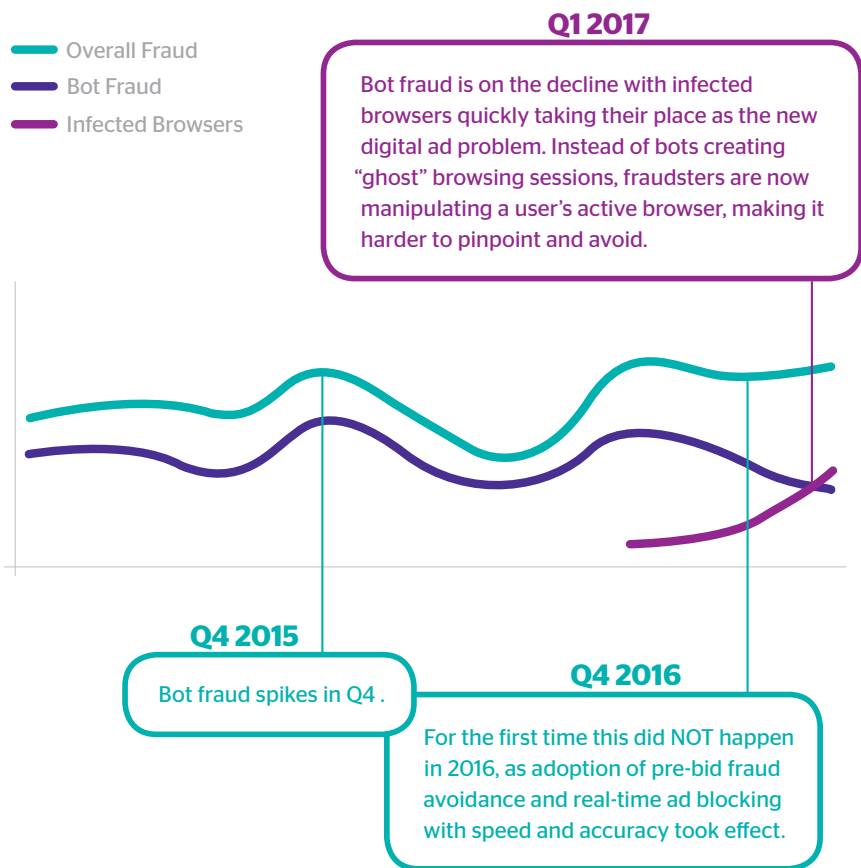


...AND BY MARKET

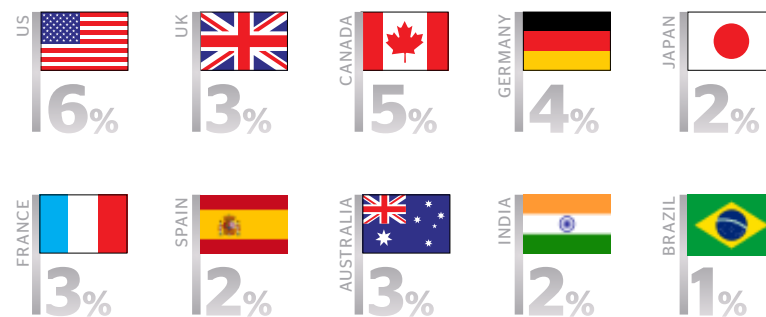


Bots are no longer the king of fraud.

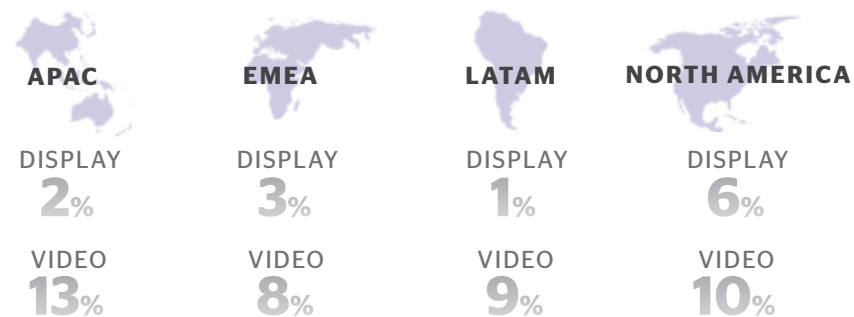
NEW FORMS OF FRAUD ARE TAKING OVER.



FRAUD RATES BY COUNTRY



FRAUD RATES BY MARKET



Viewability is better... but still has a long way to go.

DISPLAY VIEWABILITY

44% → 52%
2015 FY 2017 YTD

VIDEO VIEWABILITY

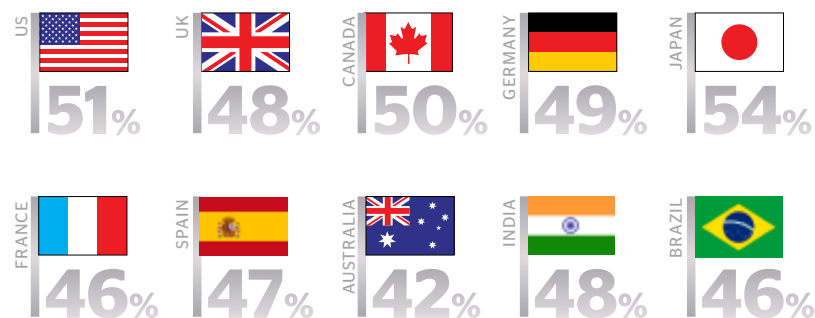
35% → 59%
2015 FY 2017 YTD

VIEWABILITY

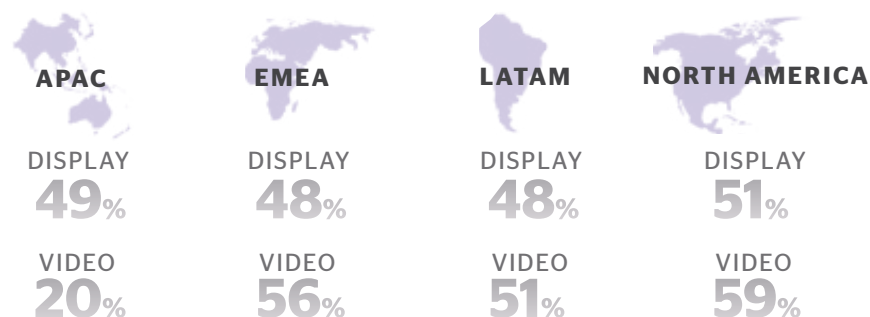
is recognized as the foundation on which digital campaigns are built. With cross-screen advertising becoming increasingly important to global advertisers, **DV has seen a steady increase in viewable rates over time.** However, there is still progress to be made.

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 2018 GUIDE

CROSS-SCREEN MEASUREMENT

Cross-screen transparency will become imperative as mobile app and OTT advertising budgets increase. With this shift, the demands from marketers for accountability on digital spend - regardless of device - will rapidly evolve.

ENGAGEMENT METRICS WILL RULE

Digital ad quality metrics will expand as ad tech and martech converge—from measuring the quality of an ad placement to measuring the quality of consumer engagement. Engagement metrics will encompass richer insights of consumer ad involvement as important indicators for overall ad performance.

MEDIA TRANSPARENCY WILL BECOME MAINSTREAM

Media transparency will become universal, as advertisers demand ubiquitous third-party measurement across all publishers, social sites, and programmatic platforms. Without exception, advertisers will demand the ability to measure the total quality of what's delivered, regardless of platform.

FAKE NEWS ISN'T GOING AWAY.

Global marketers can manage the predictability of fake news around political events, but also need to be prepared for the unexpected by using real-time campaign protection.

Global brands need global solutions.

Contact DoubleVerify today to learn how our global suite of services can improve your media quality.

global@doubleverify.com