

Look ahead:

Transparency will shape 2018

After a year of harsh headlines and negative coverage we asked professionals from all corners of the digital advertising industry about the challenges they faced in 2017 to learn how those challenges will drive change in 2018.

We invite you to explore what we discovered...



Our goal:

To discover how industry professionals perceived trust, transparency, and innovation in 2017, and how that will impact their focus and budgets in 2018.

Dates in field:

04.12.17 – 15.12.17

Sample:

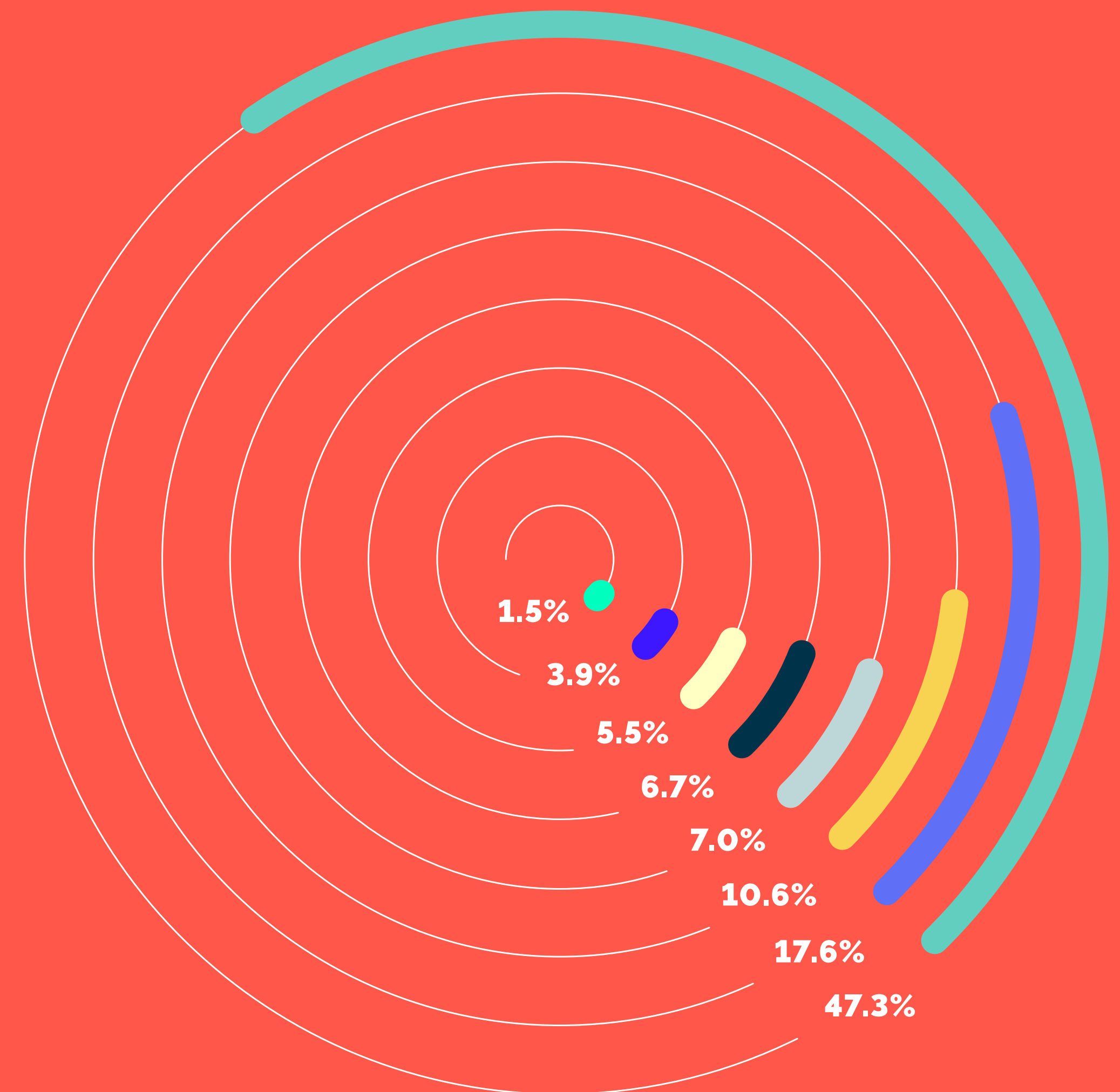
332 digital media professionals

Methodology:

Online survey

Sample breakdown:

- Agency
- Publisher
- Other
- Trading desk
- DSP
- Network or exchange
- Brand
- SSP



CHALLENGES

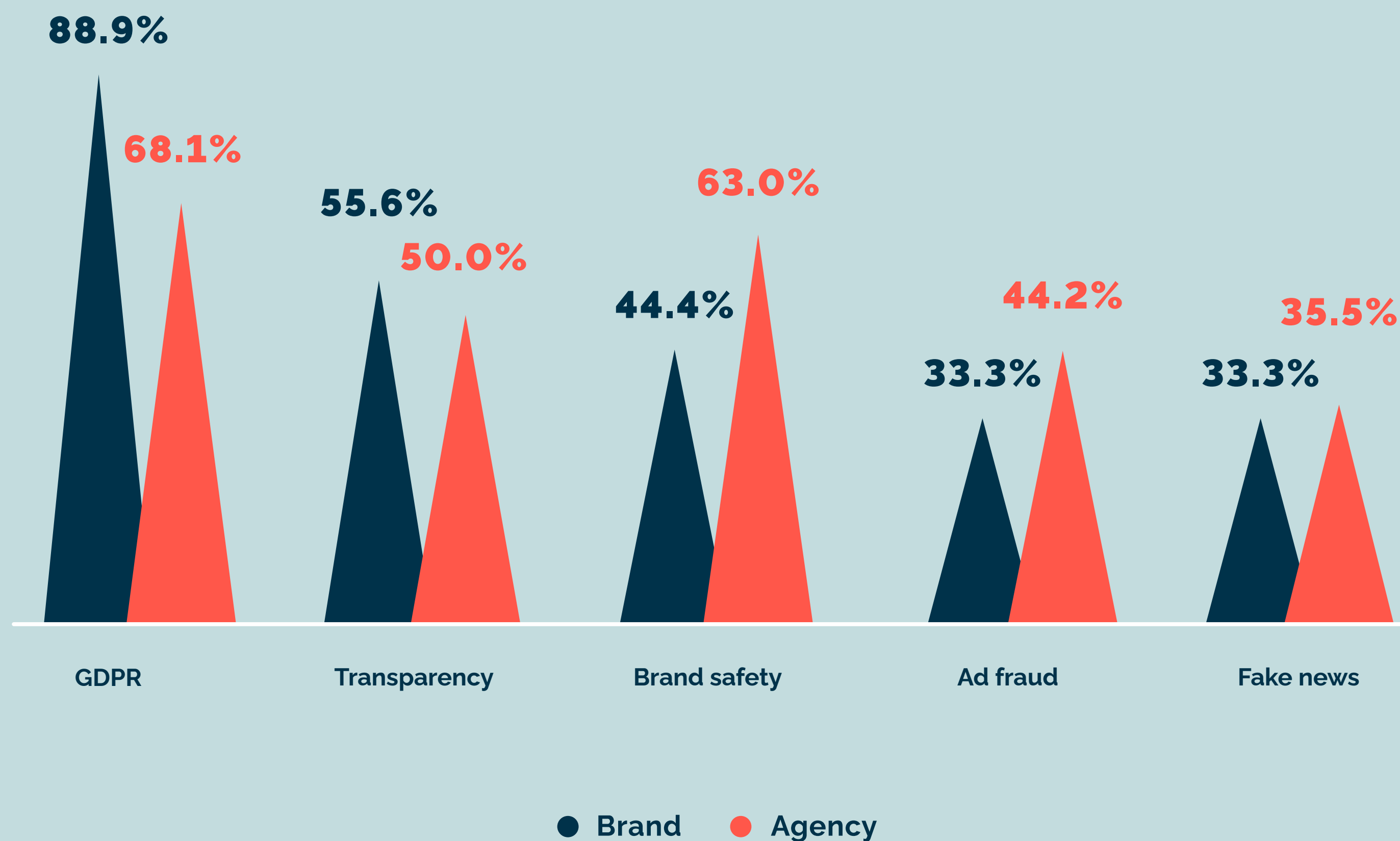
- Top challenges 04
- Brand vs agency challenges 05
- Programmatic 06
- Measurement 07
- Fake News 08



Buy side digital advertising professionals see GDPR, transparency and brand safety as greater challenges to tackle in 2018.

With GDPR coming into effect on May 25th 2018, the new data privacy regulation came top of the list of challenges industry professionals are to face this year. This was followed closely by media quality transparency and the ongoing struggle with brand safety.

Top 5 industry challenges in 2018 (% total buy side respondents)

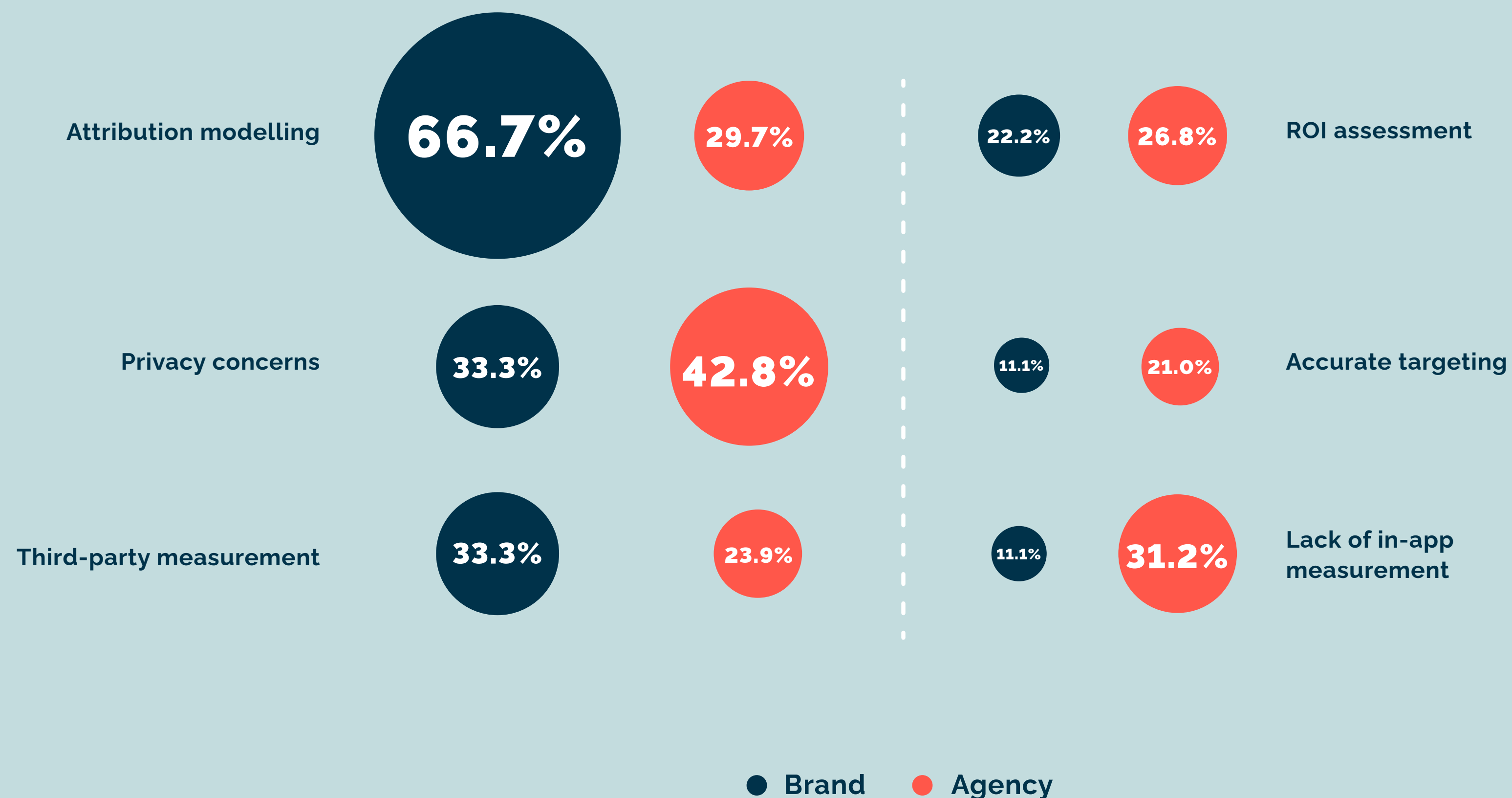


Which of the following industry challenges do you see becoming A GREATER challenge in 2018 compared to 2017? (Select all that apply).

Brands and agencies aren't always on the same page about challenges they will face.

Brands are more likely to see challenges around attribution modelling. Whilst there is a similar concern around privacy, agencies are more likely to see greater challenges in mobile due to lack of in-app measurement.

Industry challenges in 2018 - brands vs. agencies (% total buy side respondents)

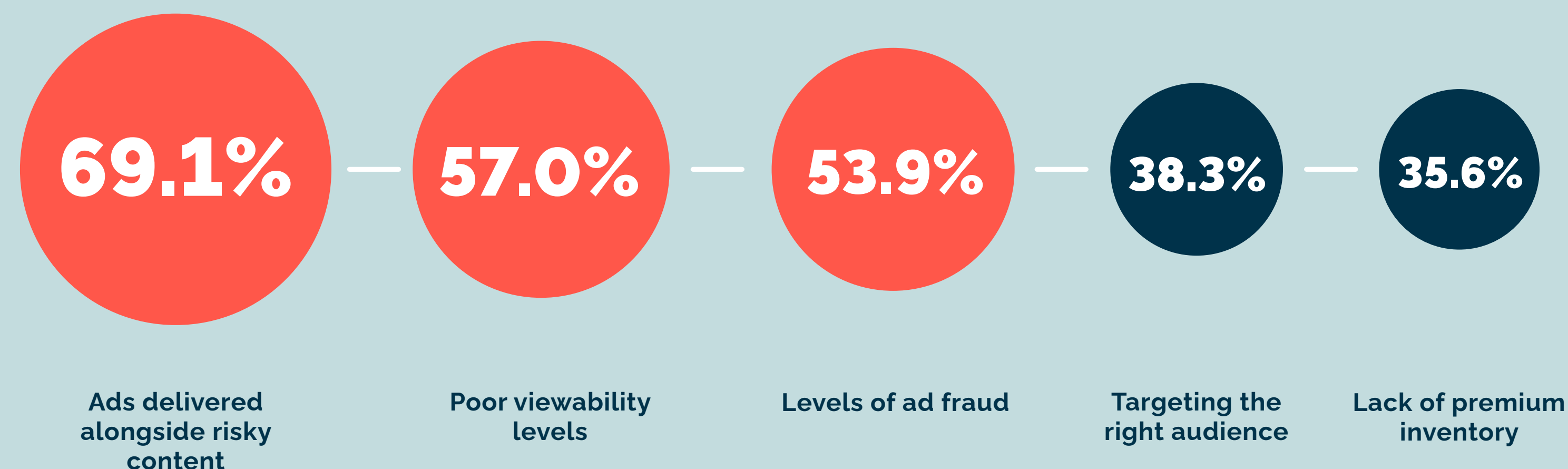


Which of the following industry challenges do you see becoming A GREATER challenge in 2018? (Select all that apply).

When focusing on programmatic, 2017 was a year of media quality challenges.

Programmatic continues to improve transacting and targeting in digital advertising. However, increased automation has led to overall increased concerns around perceived brand risk, poor viewability and levels of ad fraud in programmatic advertising.

Programmatic challenges in 2017 (% respondents)



Over the past year, which of the following do you think were significant challenges programmatic advertisers faced?
(Select all that apply).

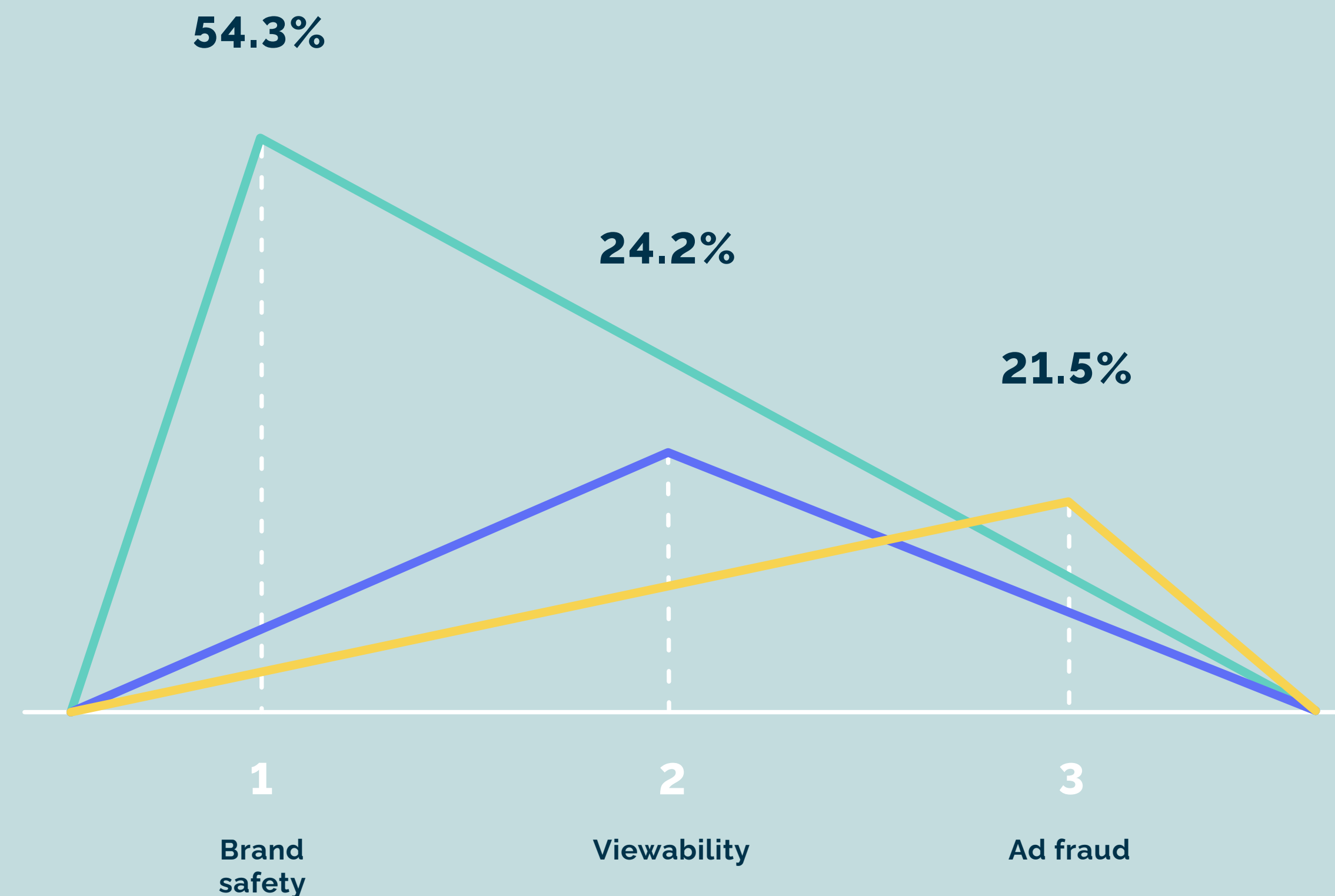
Measurement will become a focal point for 2018, with brand safety ranked as the most important quality metric to measure.

From ISIS to attacks across European cities, brands had a challenging year in regards to brand safety. With headlines revealing ads that appeared alongside unsavoury content. It's no surprise that when asked to rank media quality metrics, industry professionals put brand safety on top for 2018.



Thinking ahead to 2018, please order the following topics from the most important to the least in regards to digital campaign performance measurement. (Rank 1 has the strongest impact and 5 has the lowest impact - Based on those who ranked metric 1 or 2.).

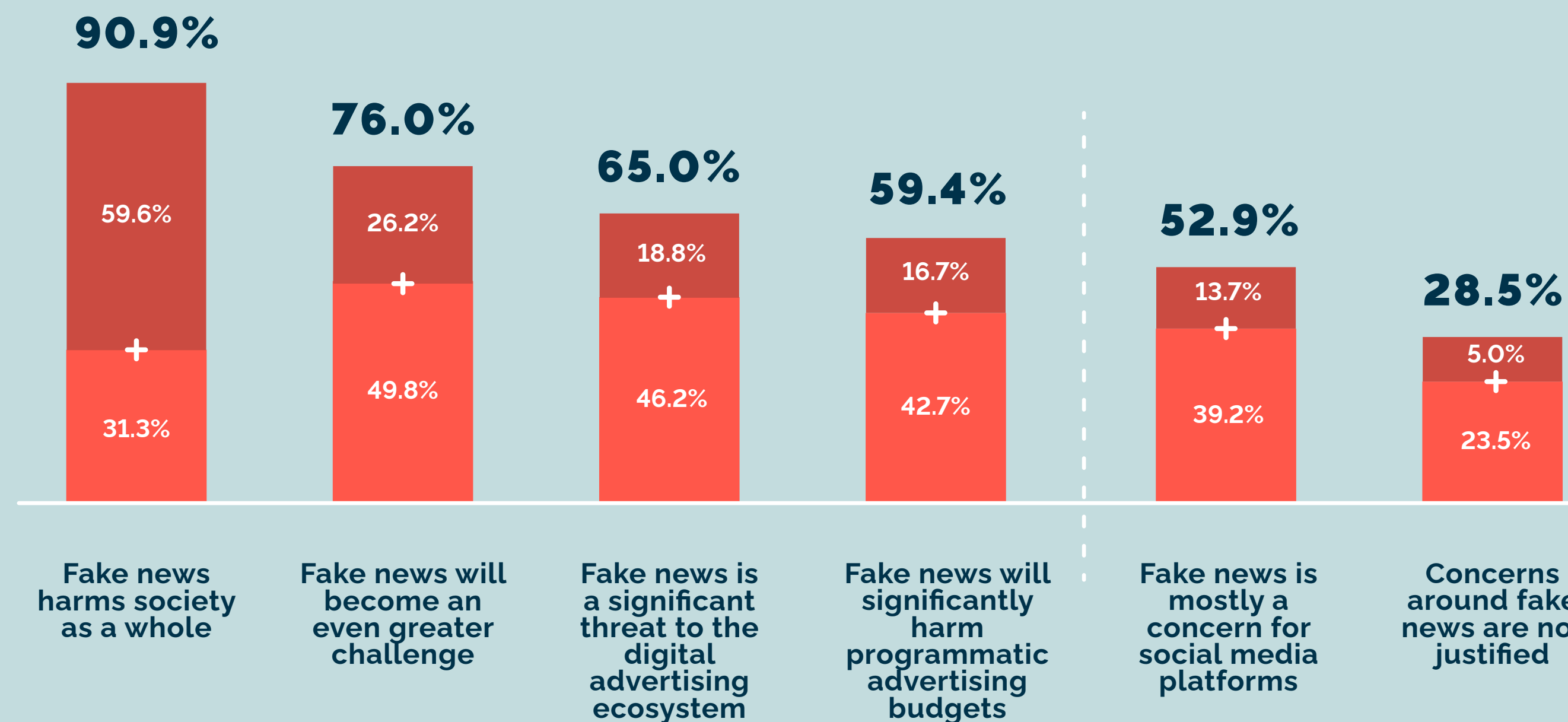
Most important measurement metrics (% ranked highest to lowest)



Fake news will challenge not only the advertising industry, but society as a whole.

Fake news is creating a crisis of trust. When asked how strongly industry professionals agree with statements about fake news, it's clear that concern about the issue goes well beyond advertising industry worries.

Statements about fake news
(% total respondents by agreement level)



Thinking about 2018, indicate how strongly you agree with the following statements.

● Somewhat agree ● Strongly agree

TRANSPARENCY

- Transparency and budgets **10**
- Social **11**
- Video + Fake News **12**



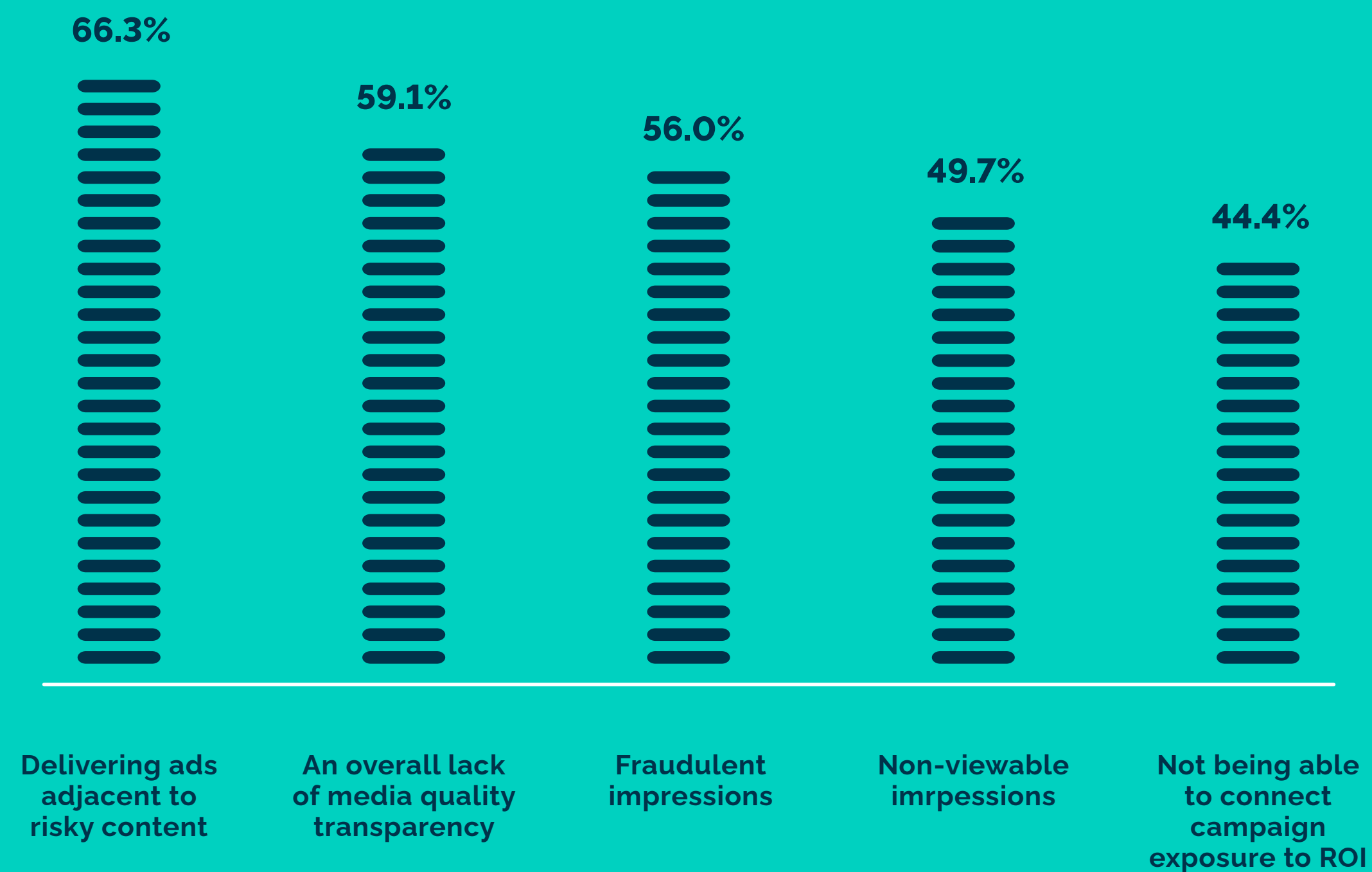
Brands are demanding transparency with their spend, and these factors are the most likely to impact spending.

Advertisers' budgets will flow into solutions that ensure that their ads are not being delivered next to risky content. They see fraud and transparency concerns as the most likely to impact their media budget allocation.



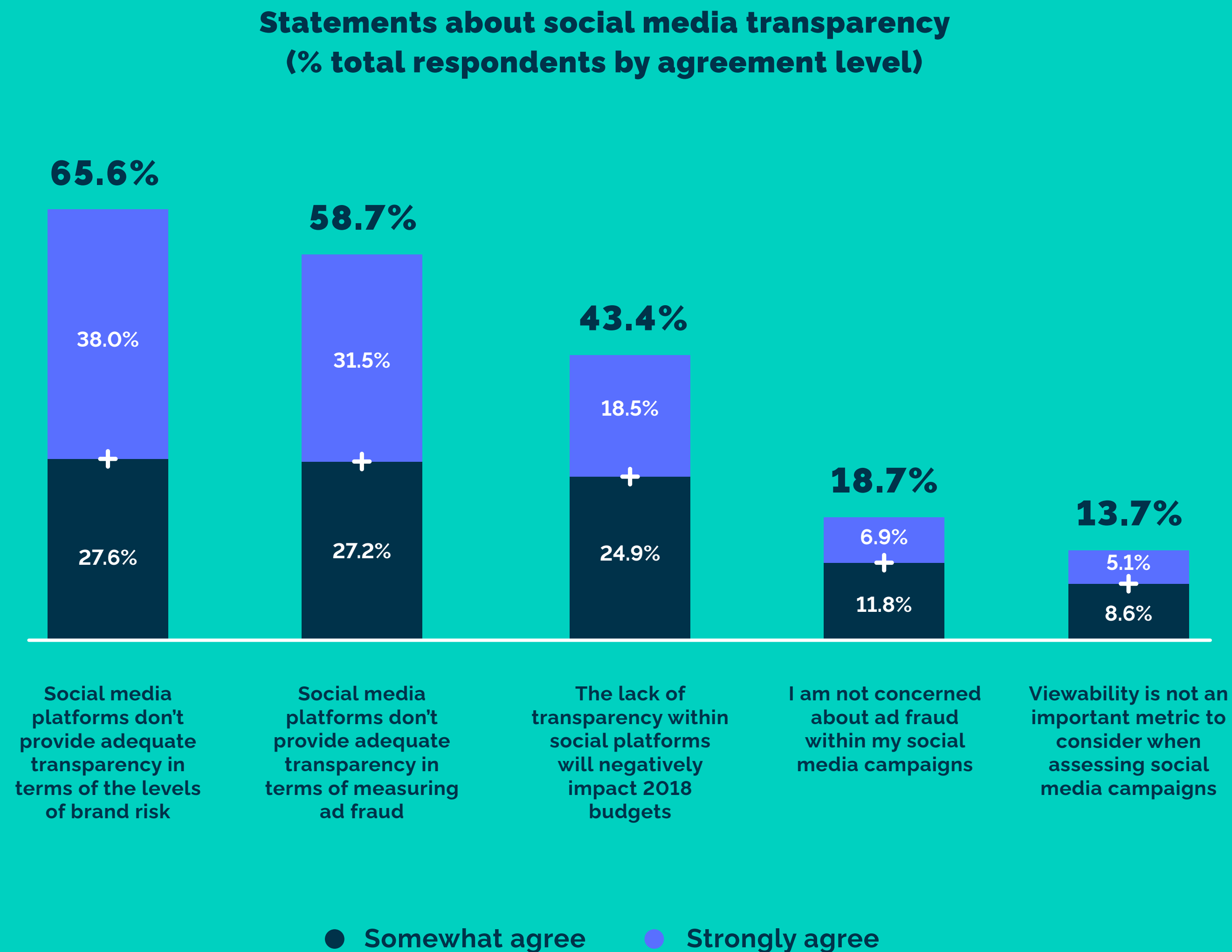
Rate how strongly you see each of the following as a threat to increasing investment in digital advertising. (Rank 1 has the strongest impact and 5 has the lowest impact - Based on those who ranked metric 1 or 2.).

Threats to digital advertising budgets (% total respondents rated a significant threat)



Transparency concerns extend to social platforms, too.

Industry professionals agree that there aren't adequate levels of transparency on social platforms across brand risk, ad fraud, and viewability. However, industry professionals also feel that viewability is not an important metric to consider when assessing social media campaigns.



Indicate how strongly you agree with the following statements about social media platforms.

Buy side professionals see fake news and video content as higher risk factors to social media campaigns.

When asked about the biggest brand risks on social, fake news and videos topped the list. Brands and agencies are not aligned on the top sources of risk on social media platforms.



When thinking about brand risk within social media platforms for advertisers, what do you think are the biggest threats brands face? (Select all that apply).



● Brand ● Agency

TRANSACTIONING

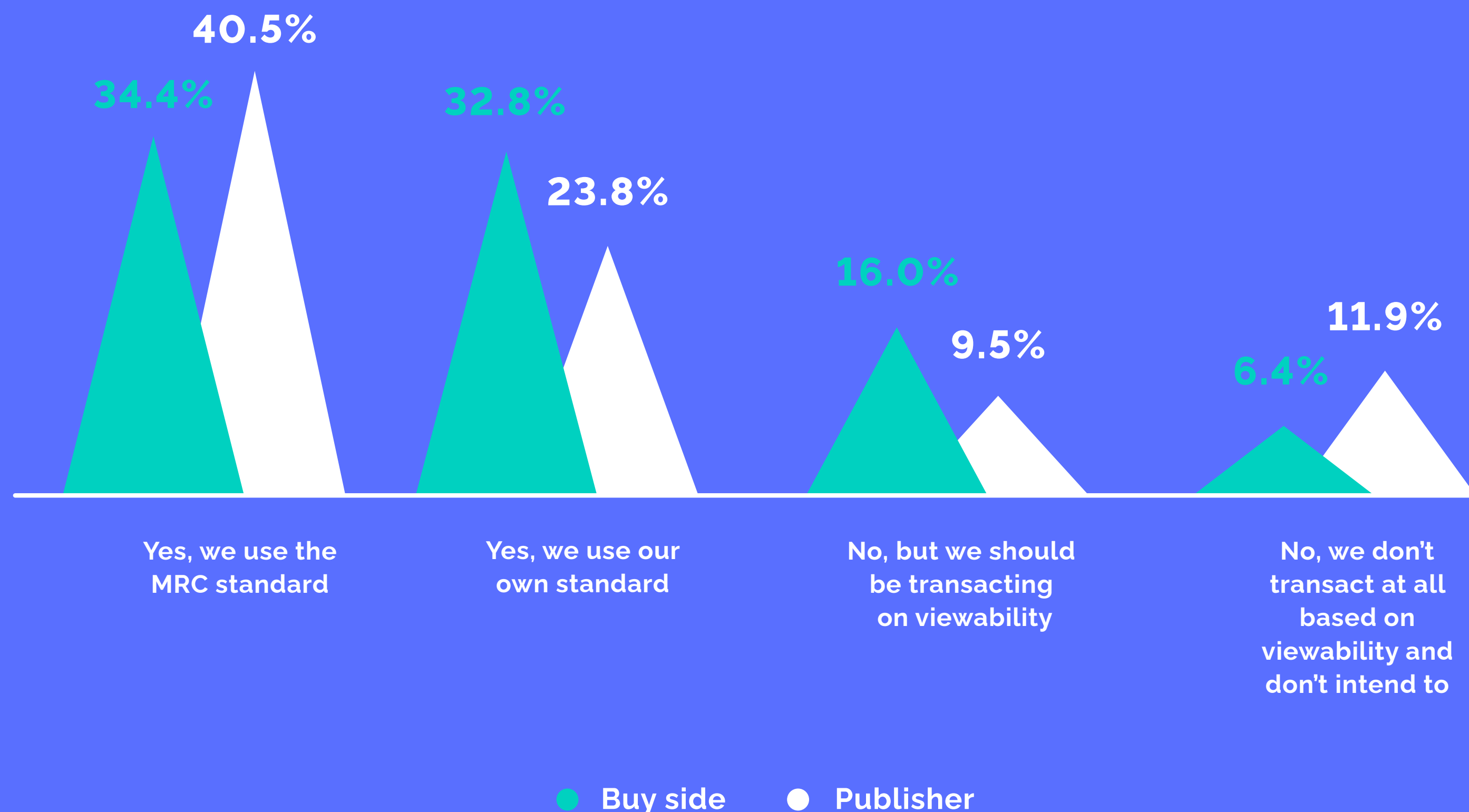
- Viewability..... 14



Viewability standards are much discussed, but which standard should we use? Publishers, brands and agencies still favour the MRC over their own standards.

Brands and agencies are slightly more likely to use the MRC standard than their own. Publishers however, are significantly more likely to use the MRC standard.

Statements about transacting on viewability
(% by brand & agency vs. publisher)



Are you currently factoring viewability into the way you transact media?

THE FUTURE

- Opportunities..... 16
- Brand vs. agency opportunities 17

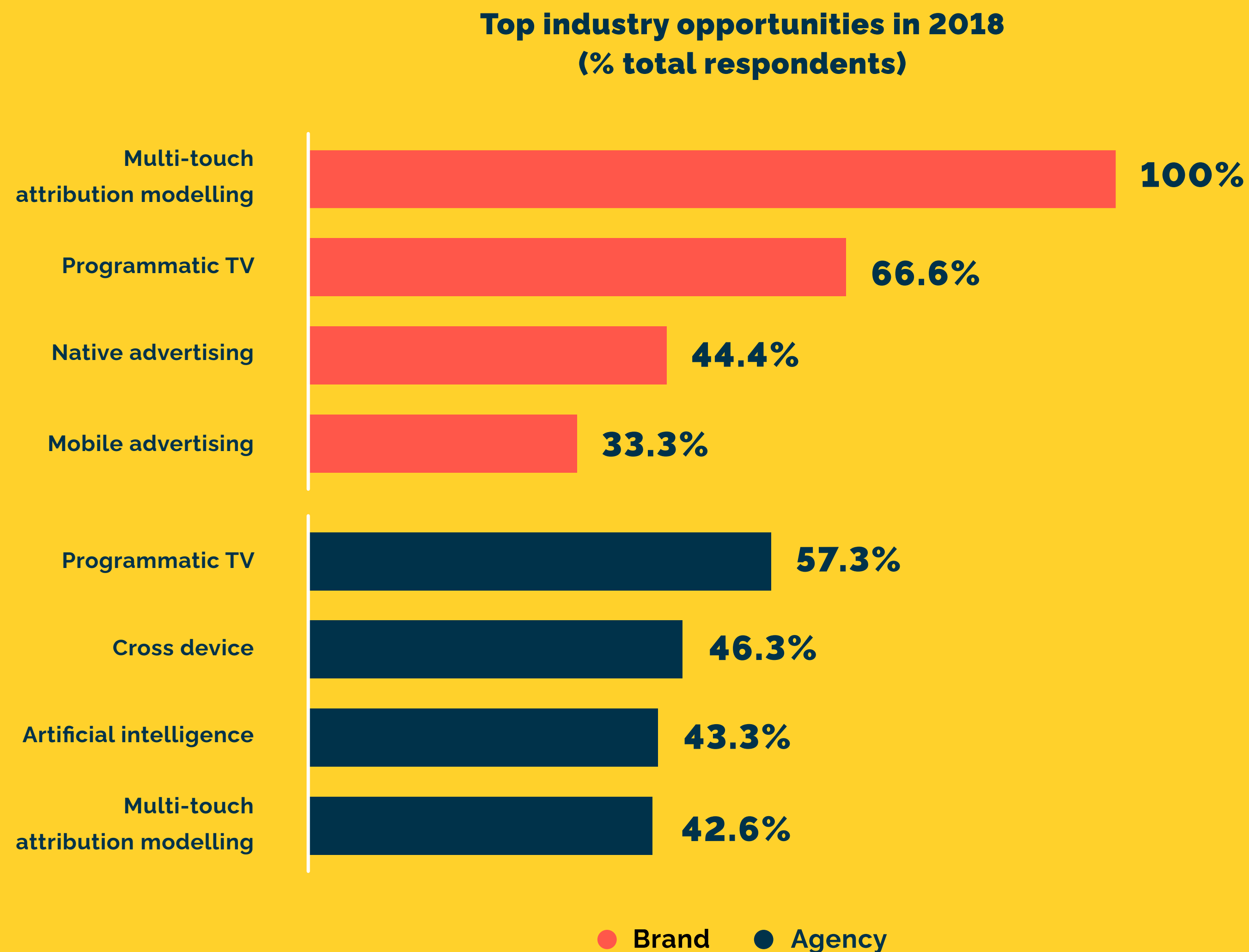


Buy side professionals see opportunity in programmatic TV in 2018.

When asked about challenges becoming opportunities in 2018, the industry is putting its bets on programmatic TV and multi-touch attribution modelling.



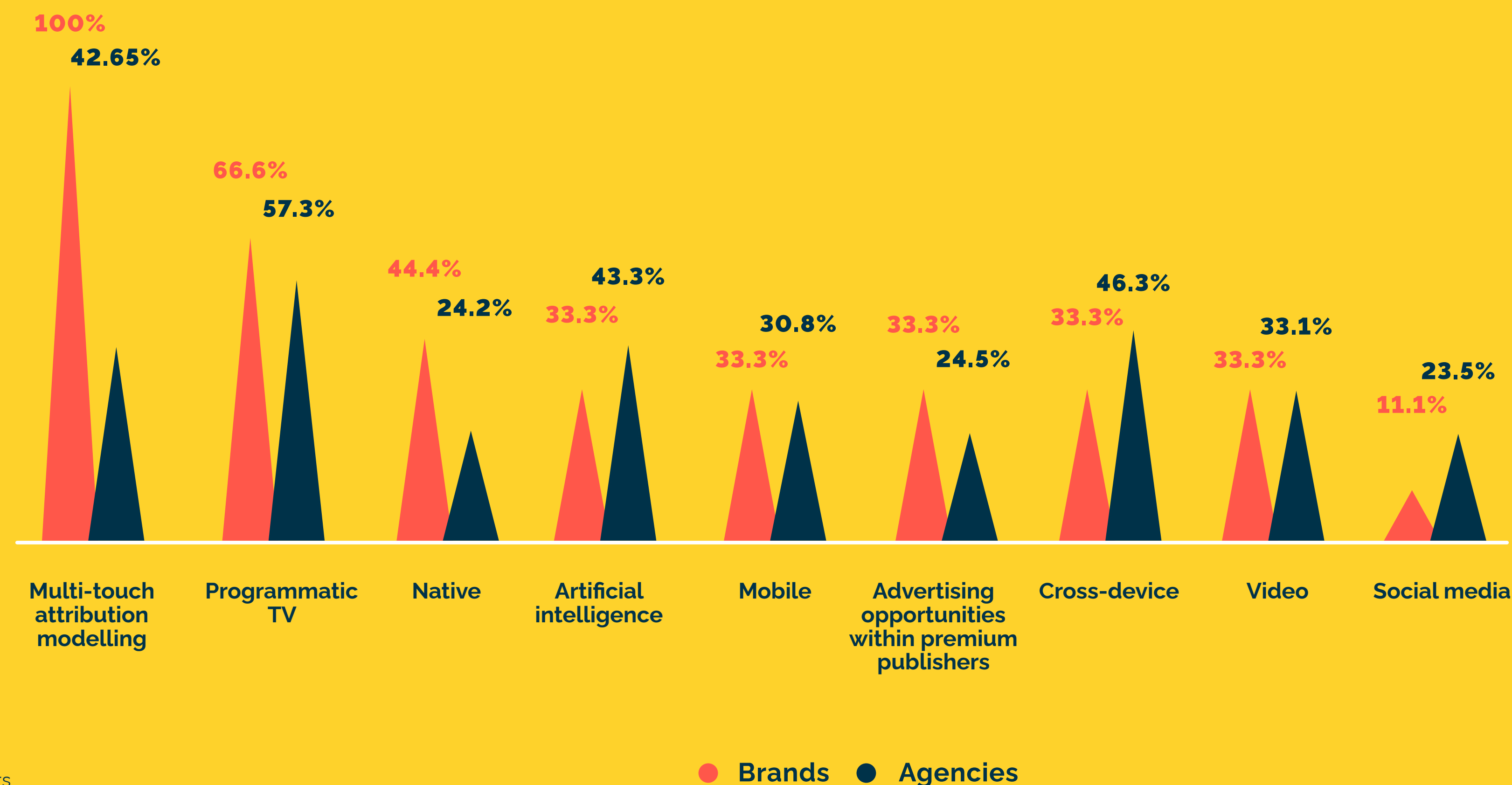
Which of the following industry challenges do you see becoming an opportunity in 2018? (Select all that apply).



Brands and agencies differ on where they see the greatest 2018 opportunity.

Brands are more likely than agencies to see greater opportunity in multi-touch attribution modelling. However, agencies are more likely to see opportunities coming from cross-device in 2018.

Top industry opportunities in 2018 (% brands vs. agencies)



Which of the following will offer A GREATER opportunity for advertisers in 2018? (Select all that apply).

In conclusion, here's what we learned:

- 1** GDPR and transparency are top-of-mind for UK brands in 2018.
- 2** Programmatic has great potential but fraud, viewability and brand risk threaten this.
- 3** After the troubles of 2017, brand risk is the major concern for the entire UK advertising industry.
- 4** Fake news is perceived as a threat not only to the industry, but to society as a whole.
- 5** Delivering ads next to risky content will become the biggest threat to future investment.
- 6** Social media transparency is a key concern and budgets will likely be impacted.
- 7** The majority of UK buyers and sellers currently use the MRC standard for viewability.
- 8** Programmatic TV is to provide the greatest opportunity for the advertising industry in 2018.

About IAS

Integral Ad Science (IAS) is a global measurement and analytics company that builds verification, optimisation, and analytics solutions to empower the advertising industry to invest with confidence and activate consumers everywhere, on every device.

We solve the most pressing problems for brands, agencies, publishers, and technology companies by verifying that every impression has the opportunity to be effective, and optimising towards those opportunities to consistently improve results. Built on data science and engineering, IAS is headquartered in New York with global operations in thirteen countries.

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