

Media Quality Report

H1 2020

GLOBAL UPDATE



IAS Integral
Ad Science

Table of contents

01

Introduction

Pg. 4

02

What's new?

Pg. 5

03

Viewability

Pg. 6

04

Time-in-View

Pg. 12

05

Ad Fraud

Pg. 16

06

Brand Risk

Pg. 21

07

Spotlight

Pg. 26

08

About IAS

Pg. 28

Foreward from our CEO

The new year not only ushered in a new decade, but also new challenges. In H1 2020, the global pandemic impacted communities and businesses around the world. As many consumers shifted their lives to stay home, their attention turned toward technology — to stay engaged, motivated, and connected.

With this shift, the advertising industry continues to seek guidance on how to best navigate these unprecedented circumstances. At Integral Ad Science, we leverage both science and scale to build market-leading verification solutions and provide global data insights.

The Media Quality Report leverages our vast database to reveal global performance metrics across key categories, allowing our partners to set benchmarks for their campaigns and strategize accordingly.

The MQR is just one of the many ways we continue to build trust and transparency throughout the digital advertising ecosystem. I look forward to sharing our benchmarks for H1 2020 with you.



Lisa Utzschneider

Chief Executive Officer
Integral Ad Science

01

Introduction

As consumers accelerate their use of technology in this unprecedented time, media quality takes center stage. Global improvements — specifically regarding time-in-view — reflect a shifted focus toward digital by consumers and the industry alike. According to eMarketer, consumers are spending an extra hour per day on digital media compared to 2019. In other words, consumer attention is likely to remain shifted toward screens, creating new opportunities to connect through the digital ecosystem.

At Integral Ad Science, we measure more than 1 trillion media metrics each day globally, allowing us the scale to observe media quality developments in real-time. The Media Quality Report leverages this database to offer an industry barometer against which ad buyers and sellers may benchmark the quality of their campaigns and inventory.



02

What's new?

More markets, more data

At IAS, we're leveraging Science + Scale to expand our reach and provide global insights. With each new edition of the Media Quality Report, we strive to include additional benchmarks and involve as many markets as our data permits. In the H1 2020 report, we are excited to announce five new markets in this global update, the largest country expansion to date: India, Indonesia, Mexico, Singapore, and Sweden. We are able to include display data for these new markets and look forward to providing additional benchmarks as they become available.

DEFINITIONS

Viewability

Per the MRC standards, a display ad impression is considered viewable if at least 50% of pixels are on screen for at least one second after the ad has rendered. A video ad impression is viewable if the ad is playing while at least 50% of the pixels are on screen for at least two continuous seconds.

Time-in-View

Time-in-view is the average duration that a viewable impression remains in view. Impressions that are not viewable according to the Media Ratings Council (MRC) standard are not included in this calculation.

Brand Risk

Impressions on pages that are flagged for posing various levels of harm to brand image and/or reputation through association, based on eight core content categories: Adult, Alcohol, Gambling, Hate Speech, Illegal Downloads, Illegal Drugs, Offensive Language, Violence.

Ad Fraud

Any impressions resulting from a deliberate activity that prevents the proper delivery of ads to real people, at the right time, in the right place — resulting in financial or opportunity loss by the advertiser and/or publisher in a particular transaction.

Optimized Fraud

Optimized fraud benchmarks represent campaigns that were executed with a fraud mitigation strategy.

Global Non-Optimized Fraud

Non-optimized fraud benchmarks represent campaigns that did not incorporate a form of fraud mitigation strategy. These benchmarks reflect a global average.

03

Viewability

Recent enhancements to our viewability methodology¹ enable agencies, brands, and publishers to more easily benchmark their own metrics against the Media Quality Report, bringing closer alignment with commonly used media planning tools and industry standards.

In H1 2020, viewability levels increased across all formats and environments worldwide. Led by significant gains in mobile app display and mobile web display, the widespread improvement pushed the global averages above 70% across nearly all formats and environments. At the country level, rising viewability levels were most pervasive and significant for mobile web display, with five markets achieving double-digit absolute YOY improvements: Japan (+17.7 percentage points), Spain (+16.3pp), New Zealand (+14.4pp), Italy (+13.3pp), and Germany (+10.0pp).

Video continues to be the most viewable format around the globe, with viewability rates for desktop and mobile web averaging 75.2% and 73.6%, respectively.

Programmatic inventory remains a key driver for viewability. The markets that experienced the greatest YOY increases also saw larger viewability gains for programmatic-enabled transactions than for publisher direct sales.

Sizable increases in viewability rates showed laggard markets catching up both in terms of adoption of verification solutions and expertise. As more advertisers embrace media quality solutions and gain familiarity with these technologies — especially when ensuring the quality of programmatic media buys — their growing sophistication will lead to greater optimization and rising viewability levels.

Viewability levels for mobile environments have also benefited from increasing adoption of the IAB Open Measurement SDK, a common code, and libraries for facilitating third-party access to measurement data.

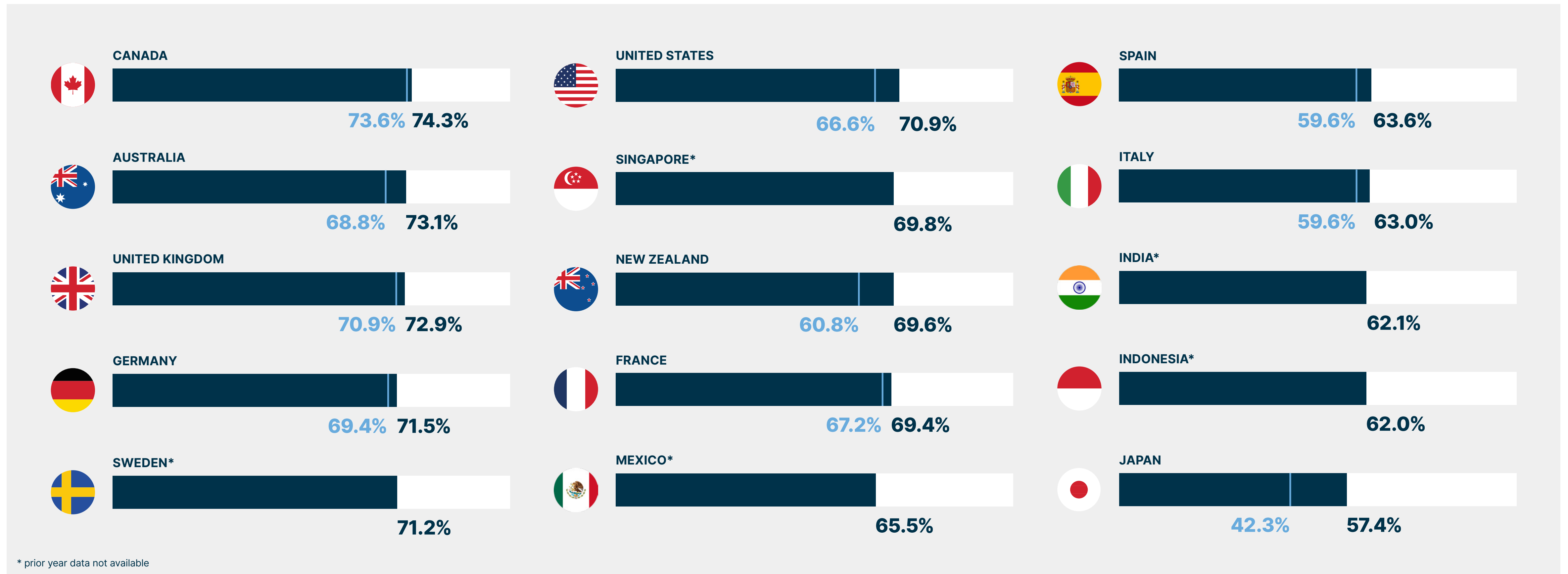


Viewability | Desktop Display



● H1 2019 ● H1 2020

WORLDWIDE 69.2% 71.9%

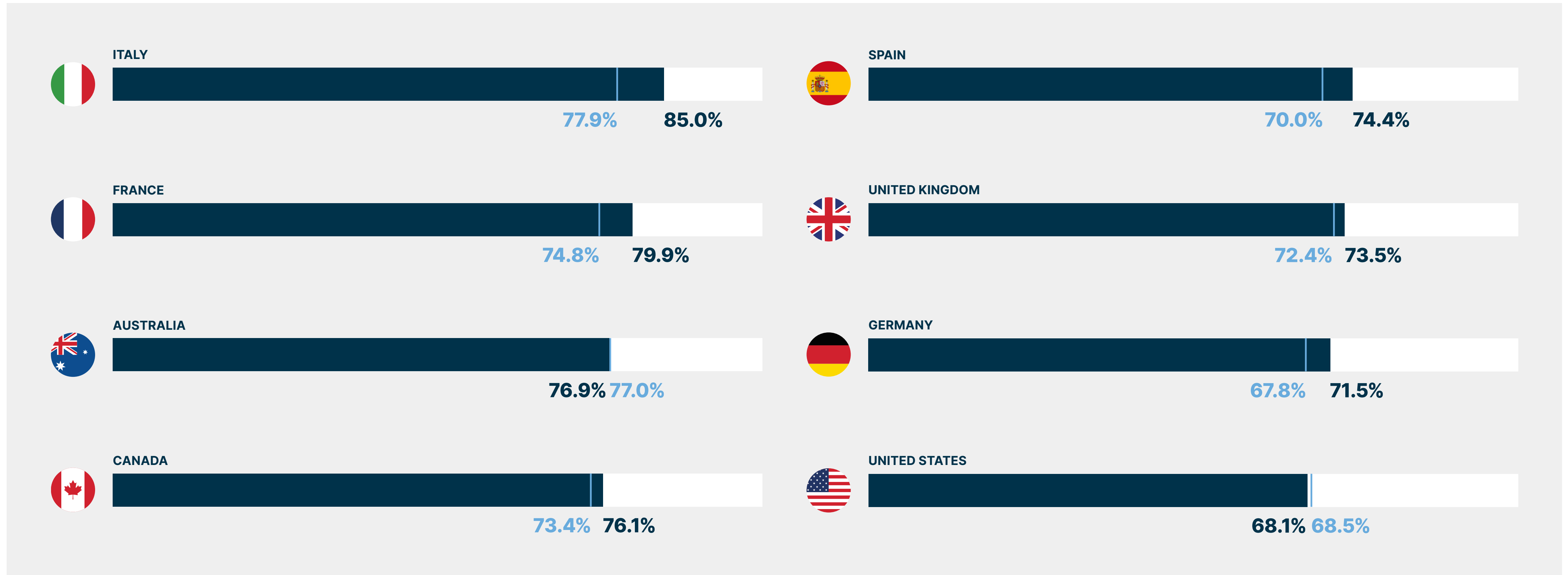


Viewability | Desktop Video



● H1 2019 ● H1 2020

WORLDWIDE 71.9% 75.2%

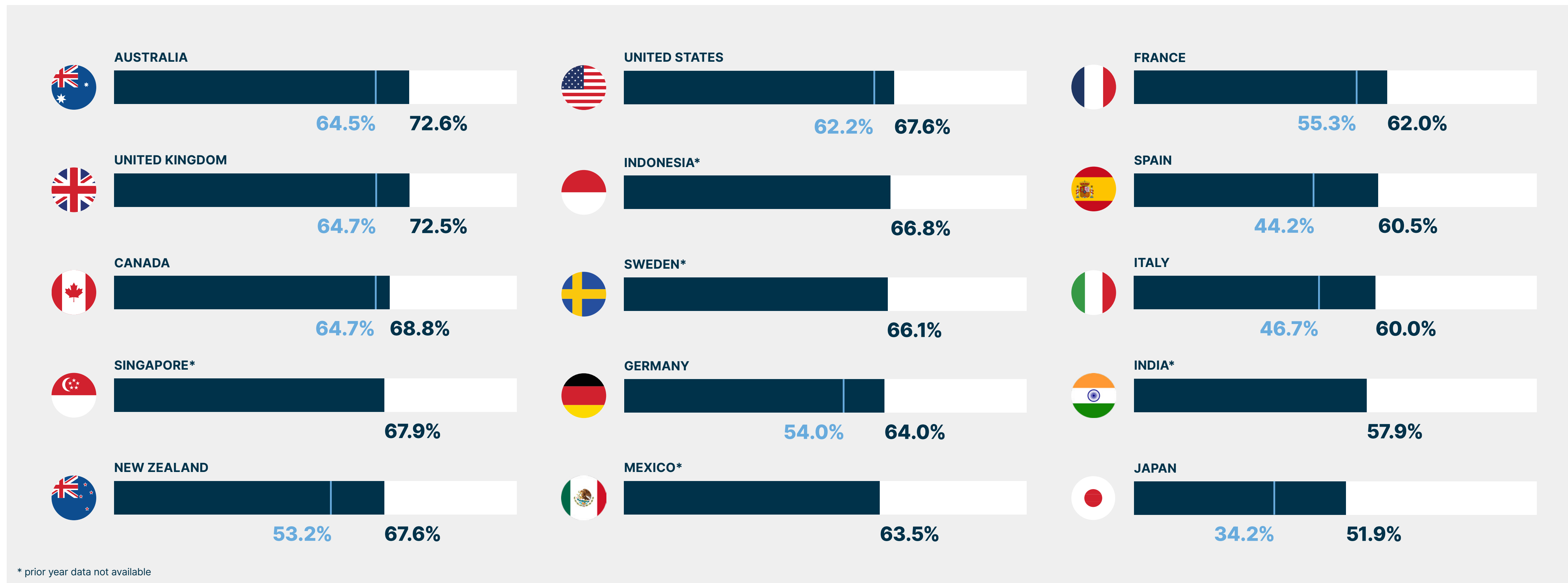


Viewability | Mobile Web Display



● H1 2019 ● H1 2020

WORLDWIDE **60.4%** **67.6%**

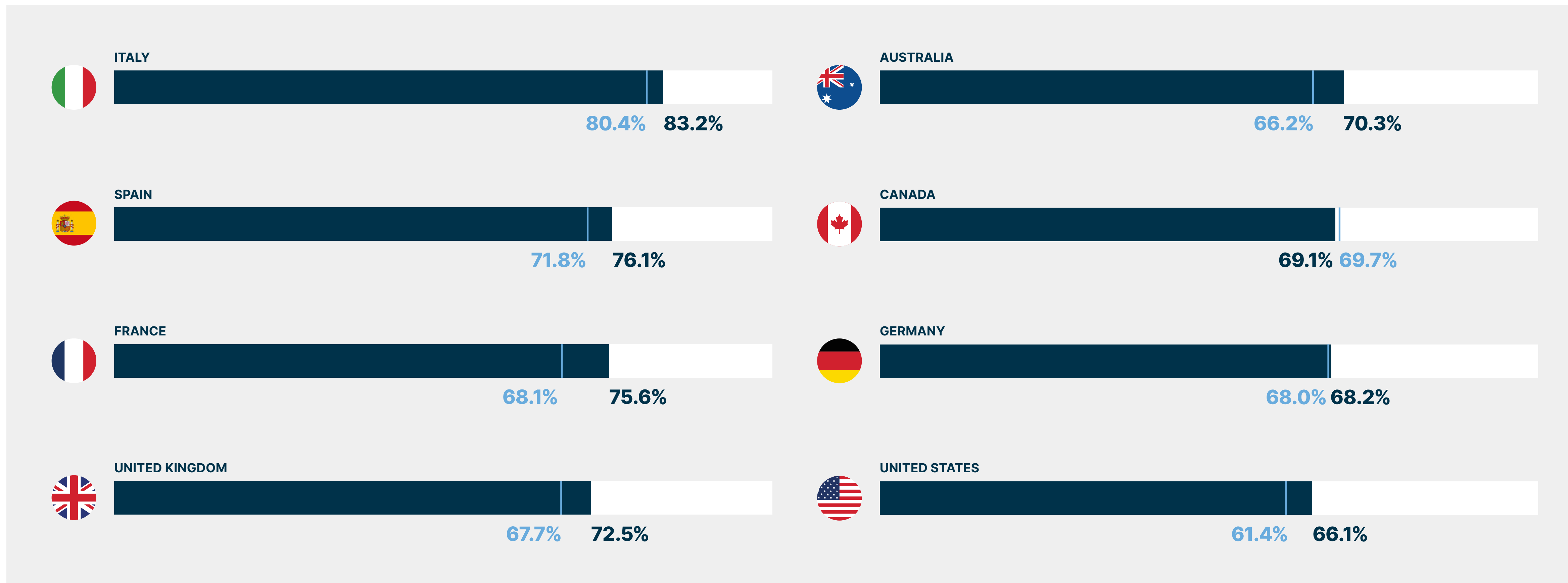


Viewability | Mobile Web Video



● H1 2019 ● H1 2020

WORLDWIDE 68.8% 73.6%

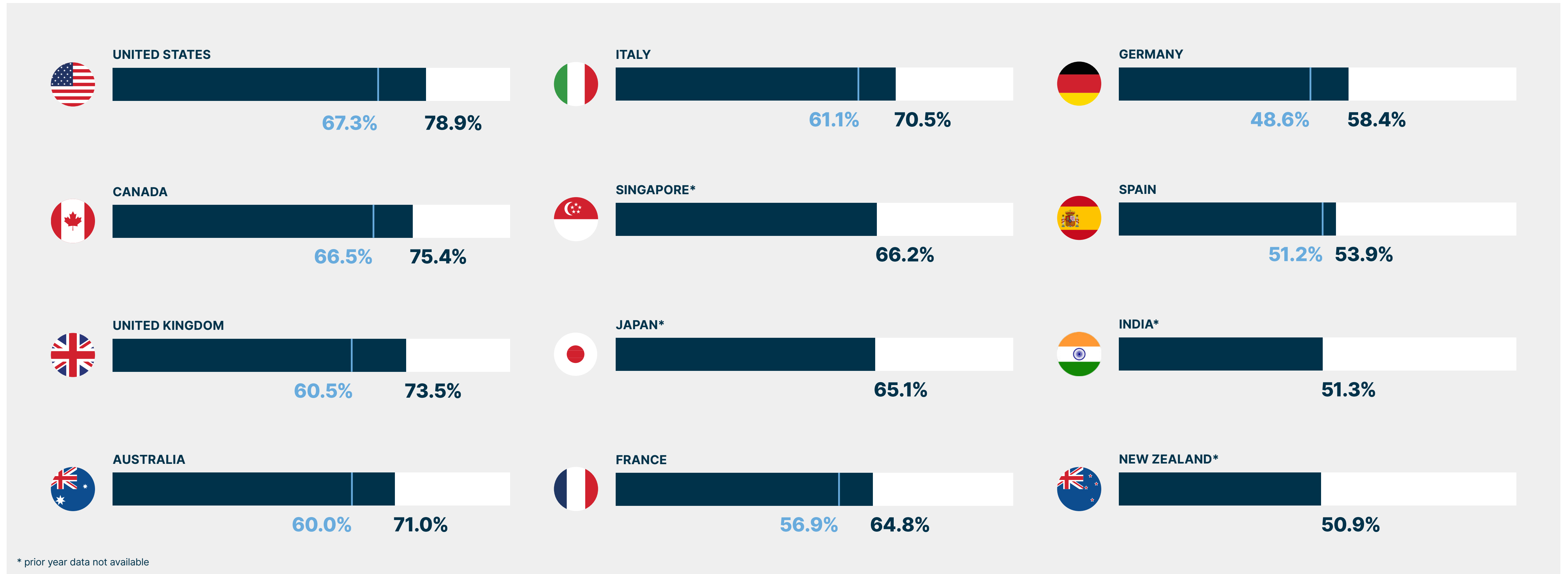


Viewability | Mobile App Display



● H1 2019 ● H1 2020

WORLDWIDE **62.3%** **70.8%**



04

Time-in-View

Time-in-view reporting has been steadily rising as an integral part of the industry expert's verification toolkit. In April 2020, consumers polled worldwide said they increased their time spent with smartphones, laptops, and desktops as they observed lockdown orders in their community.²

Average time-in-view was highest for mobile in-app display, rising 4.0 seconds YOY to reach 24.2 seconds worldwide in H1 2020. Australia (27.9s), Spain (27.4s), and the UK (24.5s) achieved the highest time-in-view averages for mobile in-app display, with programmatic inventory remaining in view longer than ad impressions sold directly by publishers.

Desktop display impressions averaged 23.1 seconds in-view worldwide. Time-in-view for this environment tended to be higher in Italy (30.3s), Spain (26.8s), and India (25.1s). Reductions in the UK, Australia, and the US exerted downward pressure, however, bringing the global desktop display average down 0.4s YOY to reach 23.1s in H1 2020.

Appearing for the first time in this report, Indonesia led in mobile web display time-in-view with 25.2 seconds, followed by Australia (18.5s) and Japan (16.9s). All three markets were well ahead of the worldwide average in this environment.

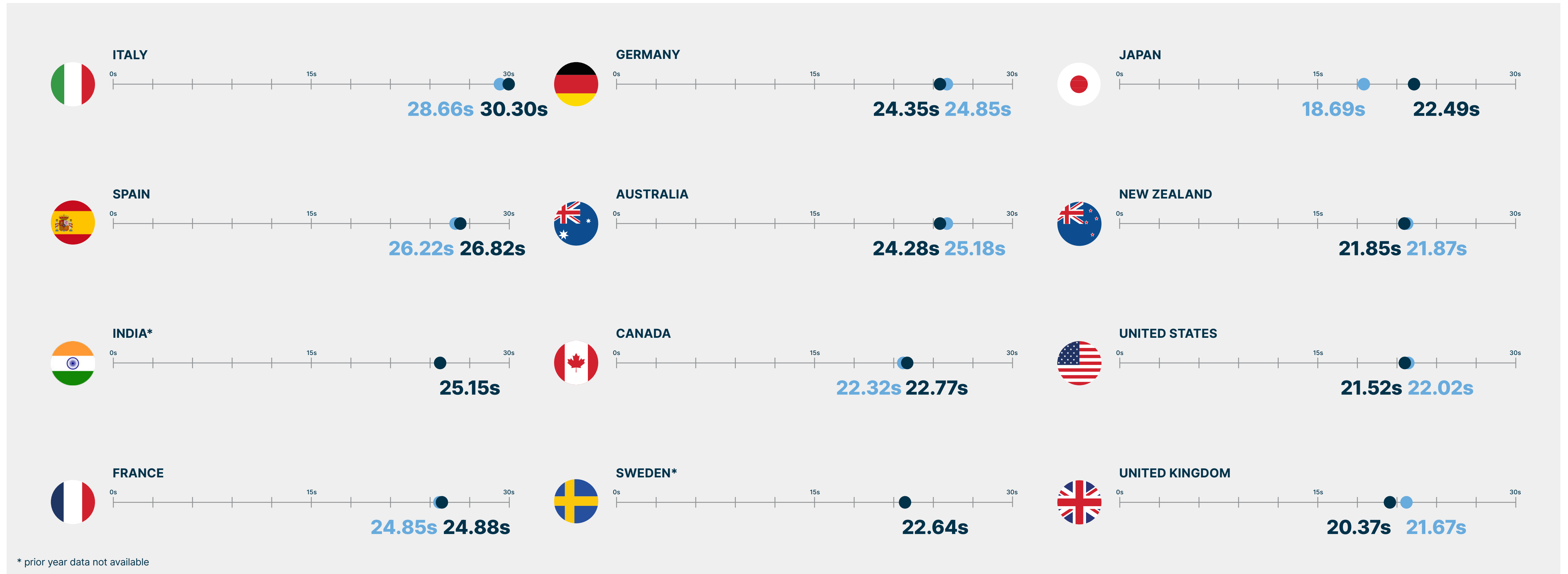


Time-in-View | Desktop Display



● H1 2019 ● H1 2020

WORLDWIDE **23.53s** **23.14s**

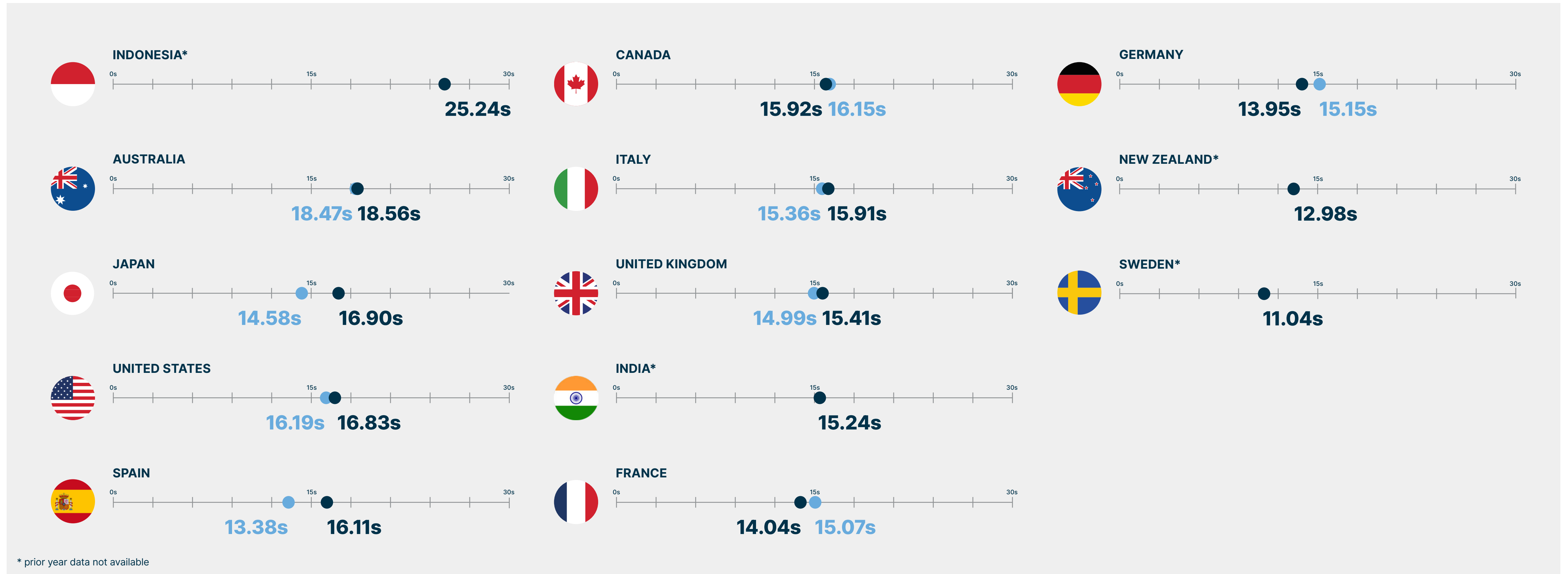


Time-in-View | Mobile Web Display



● H1 2019 ● H1 2020

WORLDWIDE 15.58s 15.71s

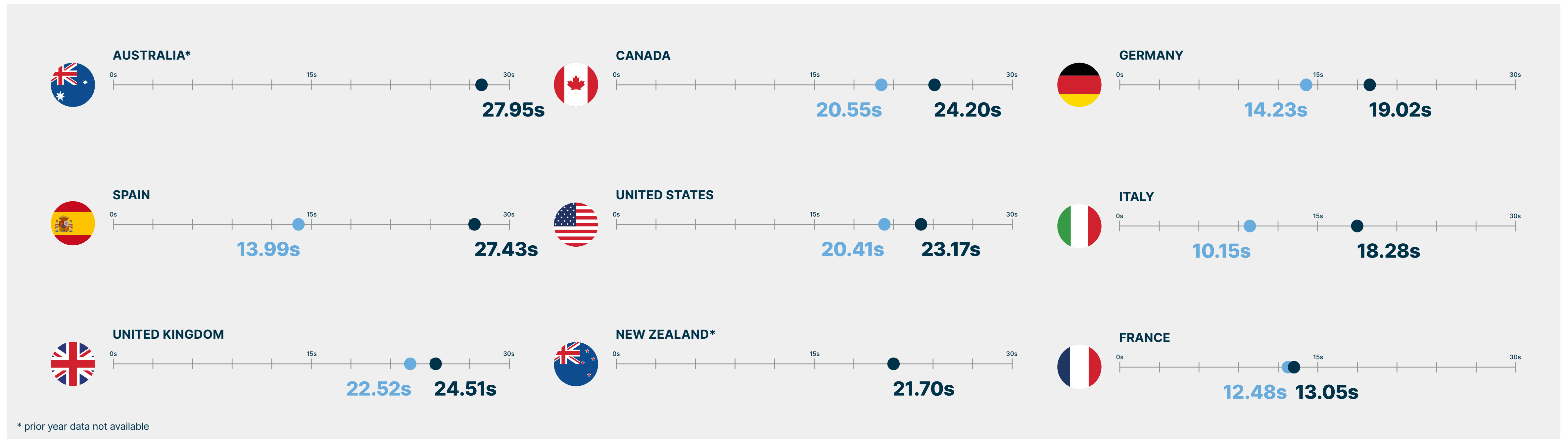


Time-in-View | Mobile App Display



● H1 2019 ● H1 2020

WORLDWIDE 20.18s 24.24s



05

Ad Fraud

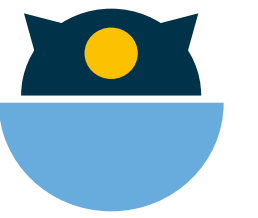
Global ad fraud rates remained exceptionally low when campaigns were protected against invalid traffic schemes. In H1 2020, optimized-against-ad-fraud rates dropped between one- and three-tenths of a percentage point across all devices and environments in this report. Mobile web video remained the safest inventory with an optimized-against-ad-fraud rate of 0.3%, while desktop display registered the highest fraud rate worldwide at 0.8% in H1 2020.

Reductions in optimized-against-ad-fraud rates in the US, Australia, and the UK improved the desktop display average worldwide, pushing it down 0.3 percentage points. Japan experienced an uptick in optimized-against-ad-fraud rates for desktop display and mobile web display, making it the only market reporting fraud rates above 2.5% in any format or environment worldwide. Relatively modest adoption of anti-fraud solutions and Ads.txt in Japan has left the door open for increased levels of invalid traffic activity, particularly for programmatically transacted inventory.

Comparatively, global non-optimized-against-fraud rates ranged between 6.9% and 13.2%, depending on the format and environment. In other words, campaigns for which optimization tools and strategies were not present tended to encounter levels of fraud up to **25x higher** than those optimized-against-fraud.

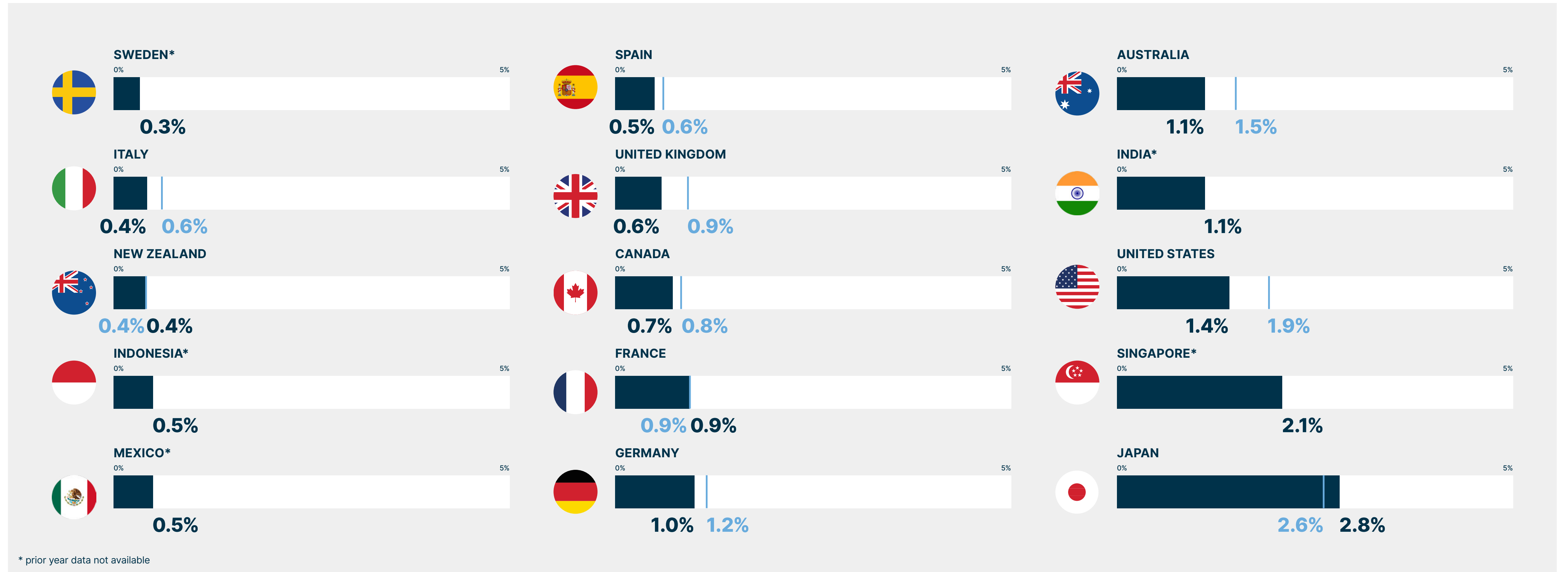


Ad Fraud | Desktop Display

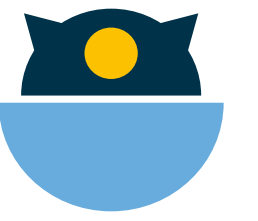


● H1 2019 ● H1 2020

WORLDWIDE OPTIMIZED **1.1%** **0.8%**
 WORLDWIDE NON-OPTIMIZED **11.7%** **13.2%**

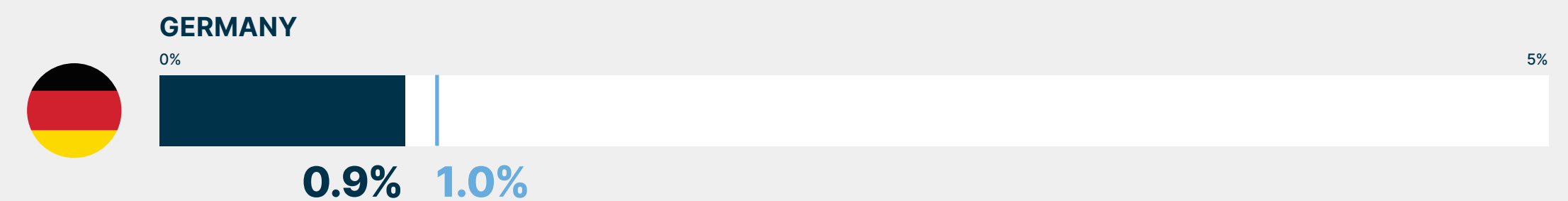
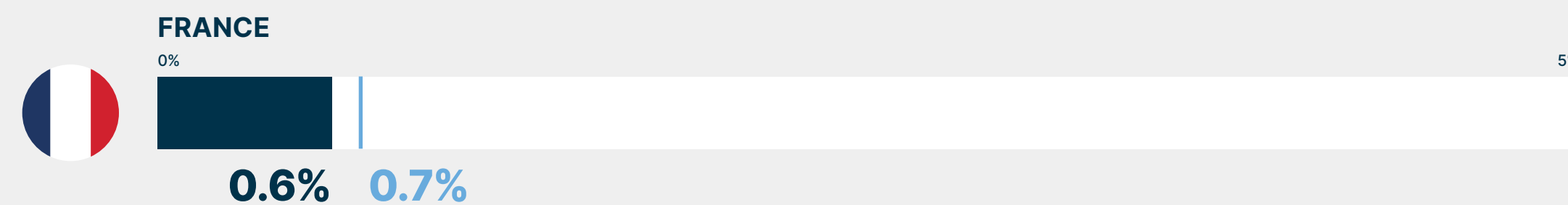
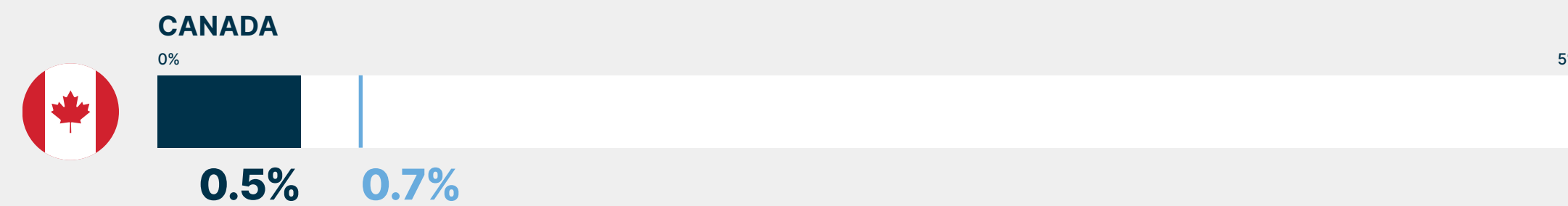
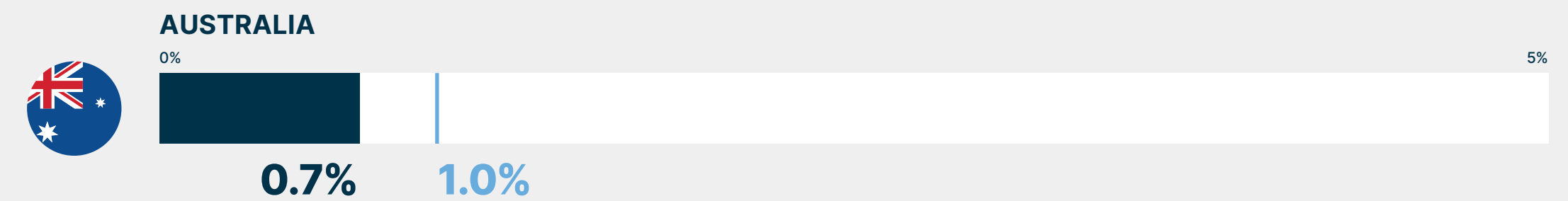
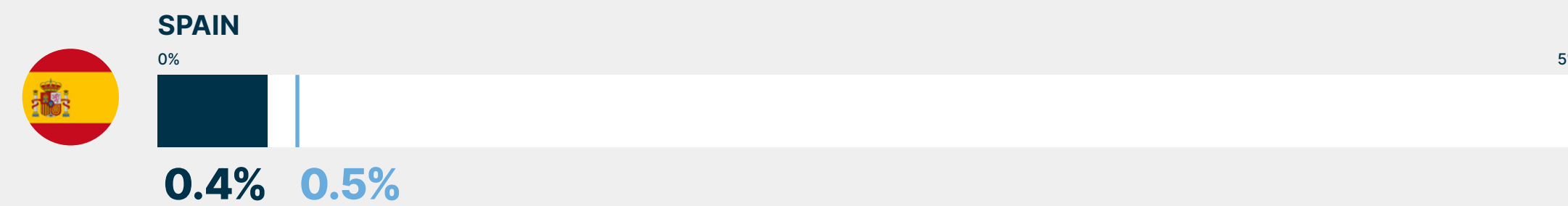
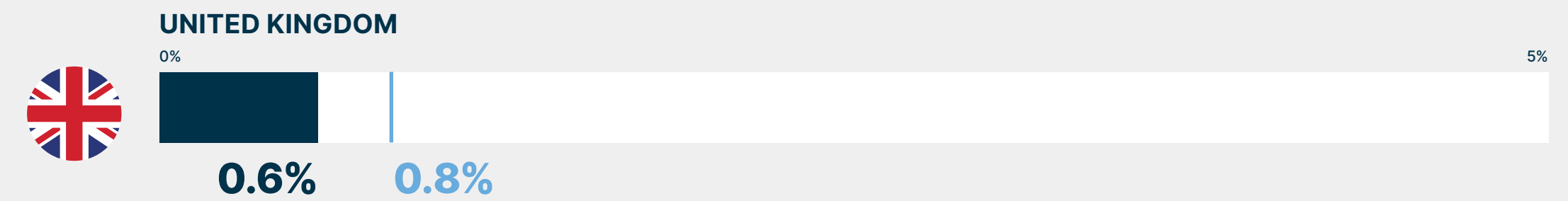
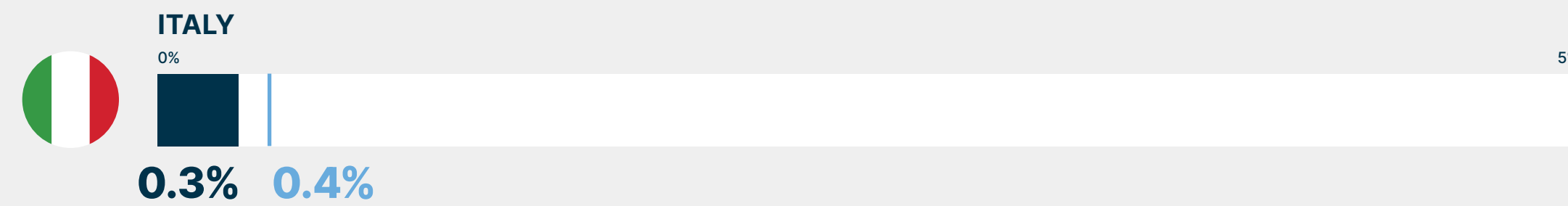


Ad Fraud | Desktop Video

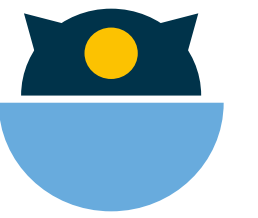


● H1 2019 ● H1 2020

WORLDWIDE OPTIMIZED **0.7%** **0.6%**
WORLDWIDE NON-OPTIMIZED **7.8%** **7.0%**

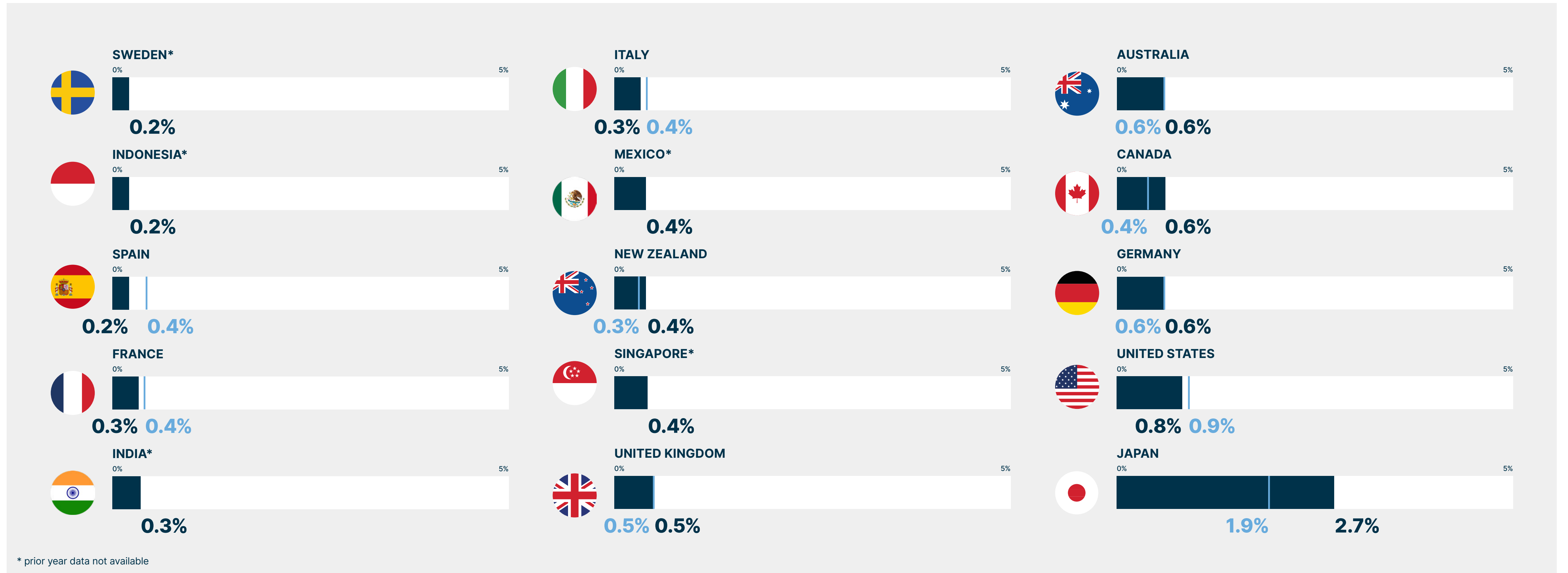


Ad Fraud | Mobile Web Display

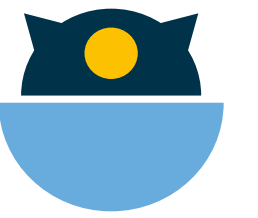


● H1 2019 ● H1 2020

WORLDWIDE OPTIMIZED **0.6%** **0.5%**
 WORLDWIDE NON-OPTIMIZED **11.9%** **13.0%**

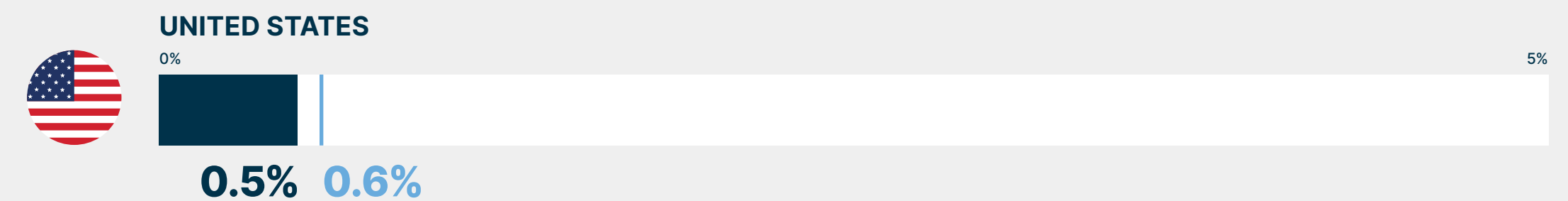
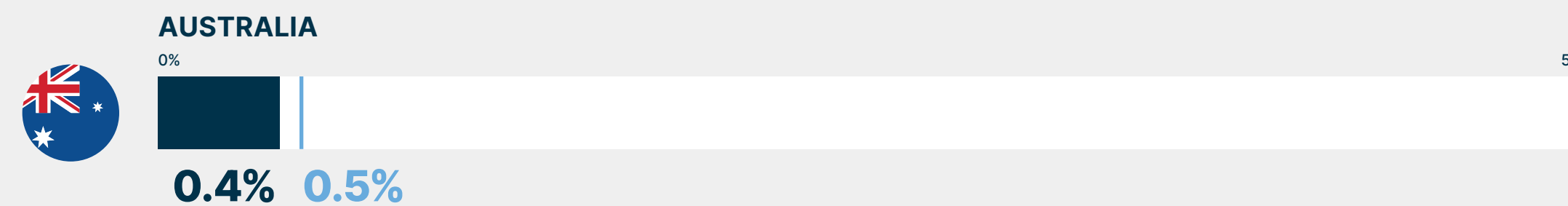
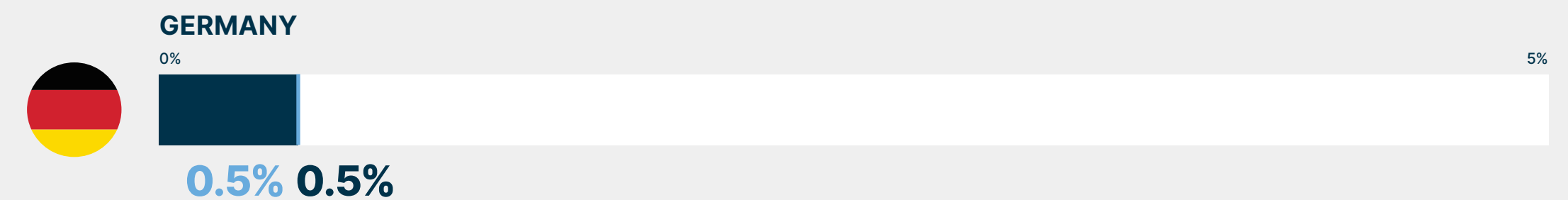
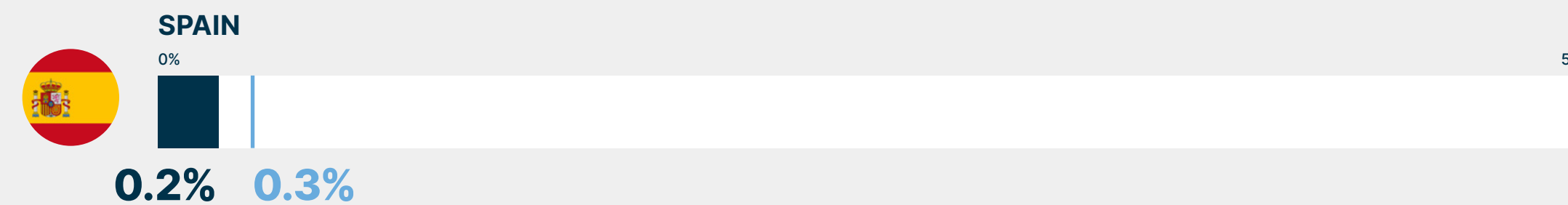
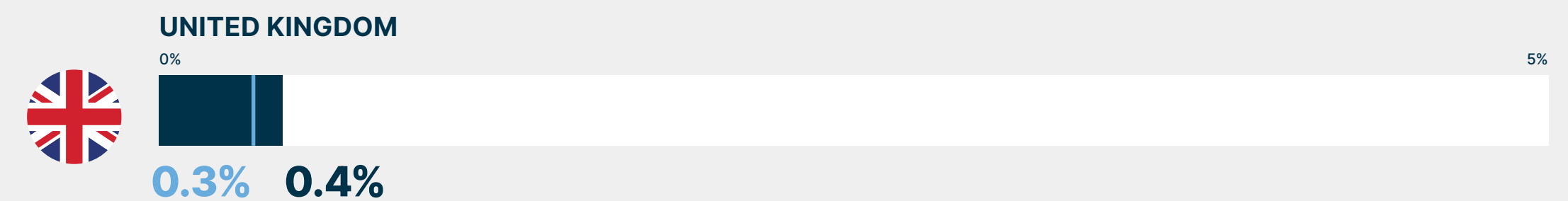
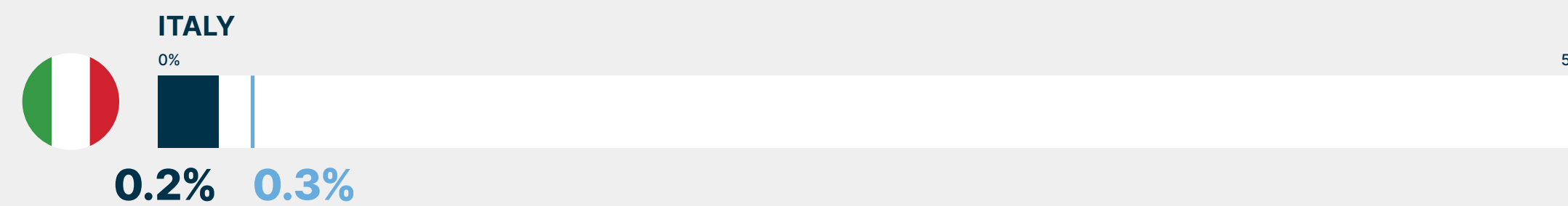
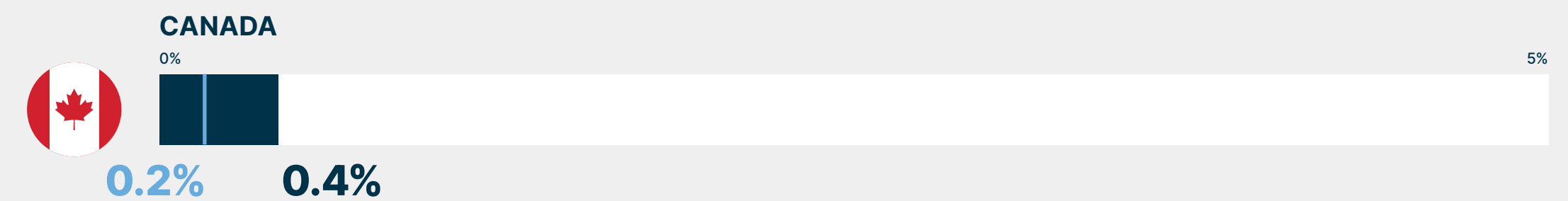
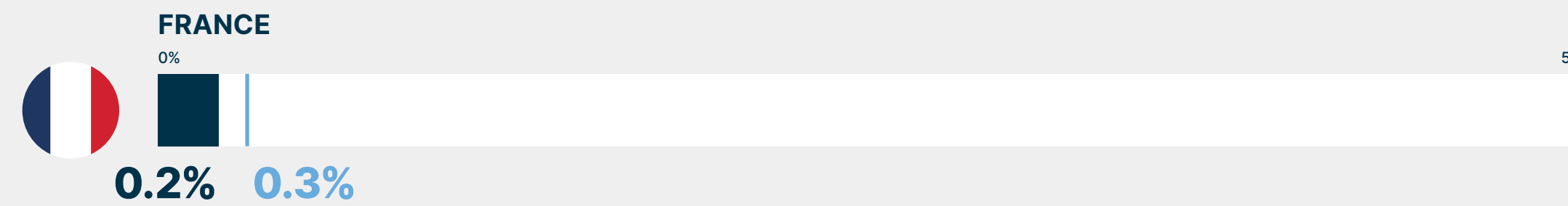


Ad Fraud | Mobile Web Video



● H1 2019 ● H1 2020

WORLDWIDE OPTIMIZED **0.4%** **0.3%**
WORLDWIDE NON-OPTIMIZED **2.2%** **6.9%**



06

Brand Risk

In an age of unfounded rates of content creation, the industry is prioritizing brand reputation and risk mitigation. From H1 2019 to H1 2020, global average brand risk, also described as the portion of pages scored by IAS as medium or higher risk, dropped across all environments and formats.

Significant brand risk reductions in Germany led the worldwide average improvement across devices and formats. This was driven by a significant reduction in programmatic brand risk levels and alcohol-related content. Beyond Germany, notable reductions in brand risk for video impressions — both desktop and mobile web — were observed in Australia, Canada, and the UK.

Display brand risk levels for desktop and mobile web trended upward in Japan and Canada. Increases in programmatic brand risk levels and violence-related content drove the results in Japan. Similarly, Canada witnessed higher programmatic brand risk levels caused mainly by a larger portion of content featuring offensive language or controversial topics. Meanwhile, Spain experienced greater brand risk for video inventory related to adult content across media purchasing methods (i.e., publisher direct and programmatic).

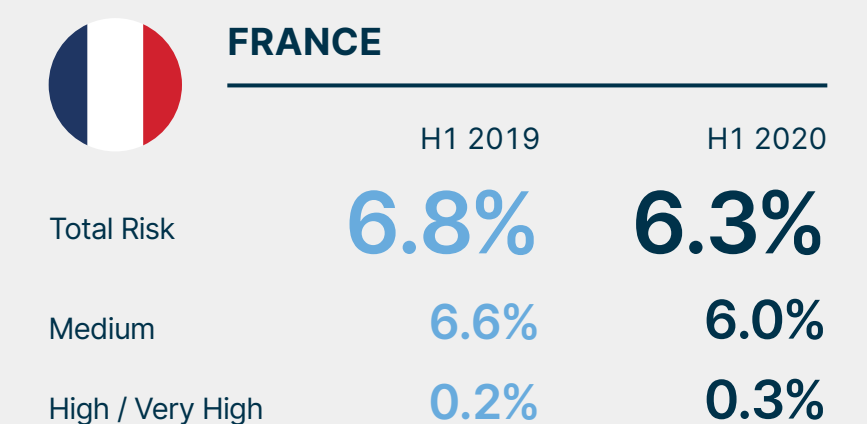
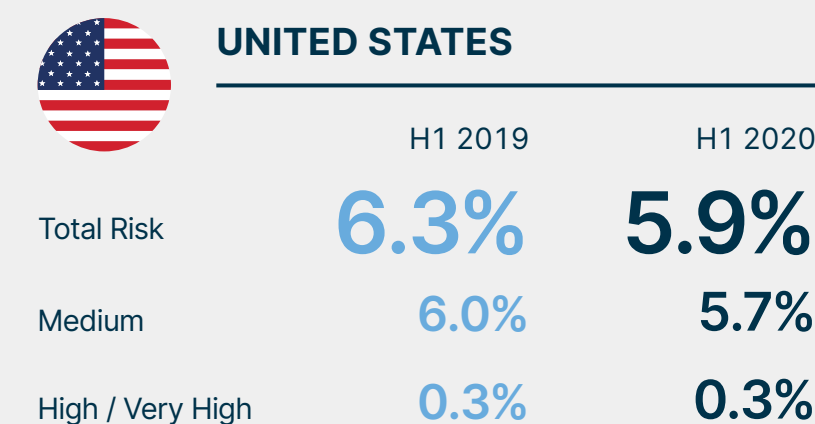
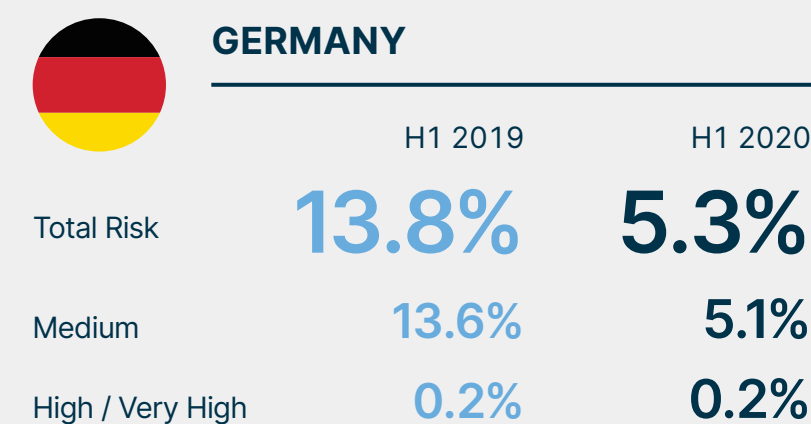
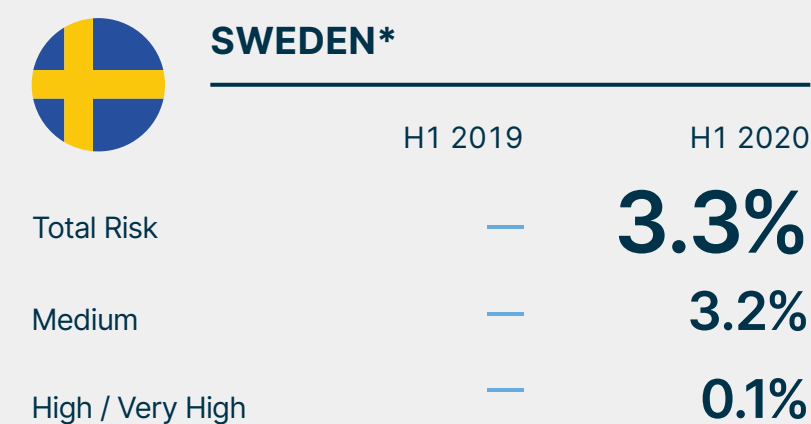
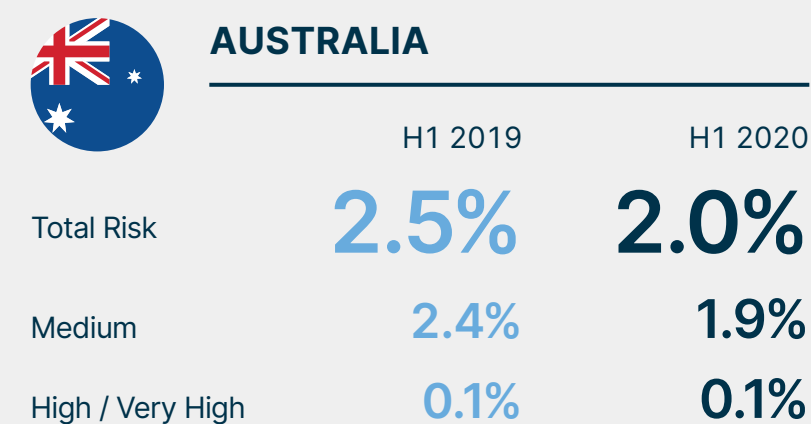
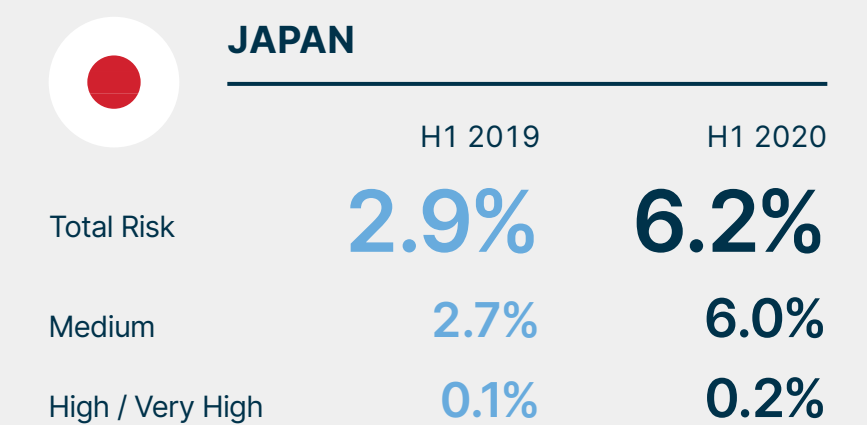
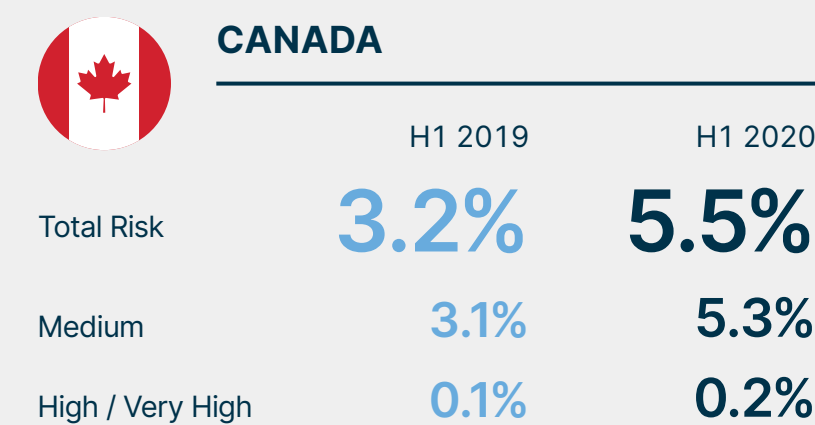
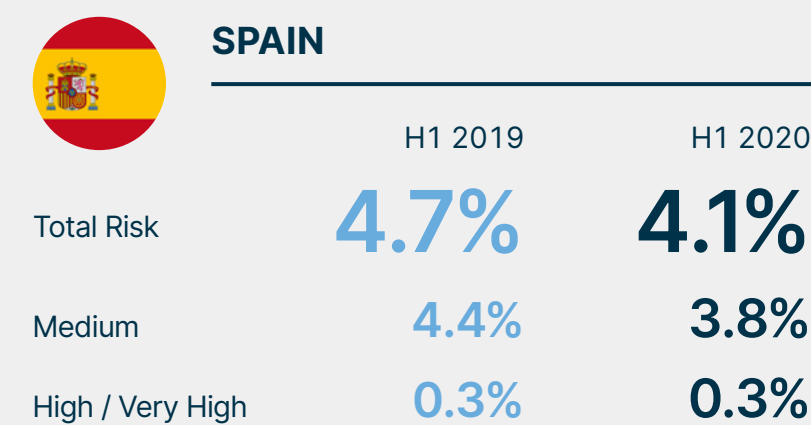
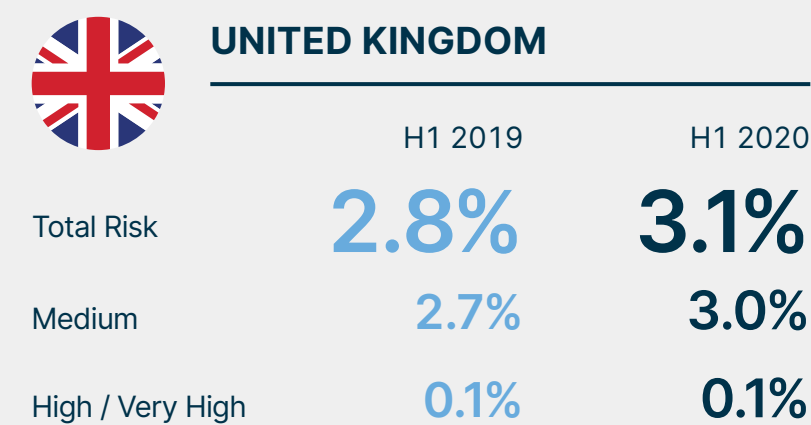
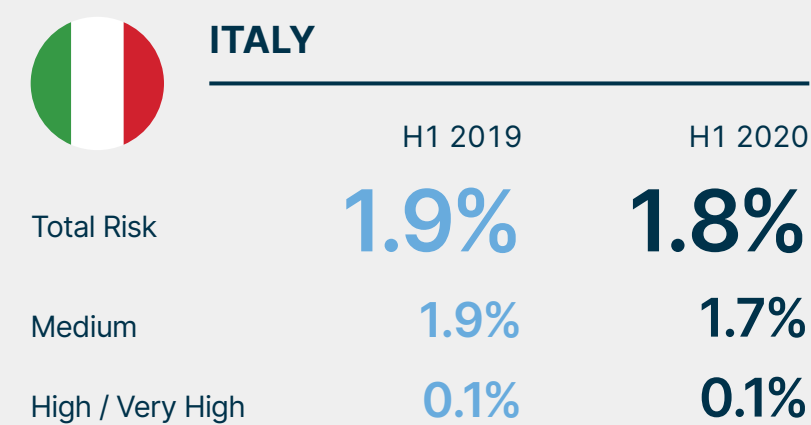
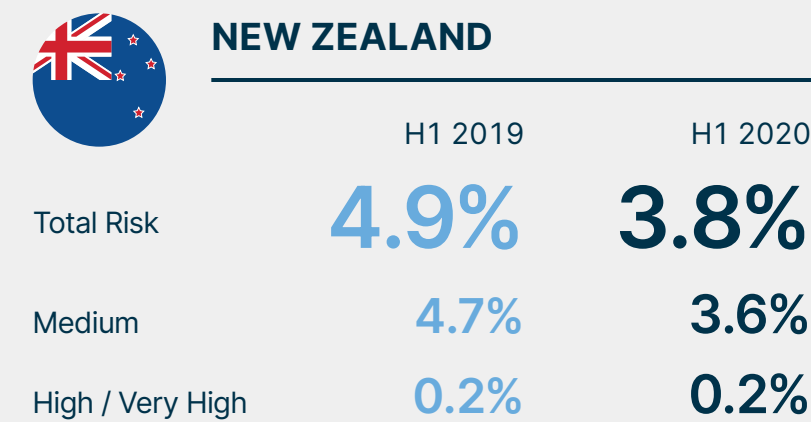
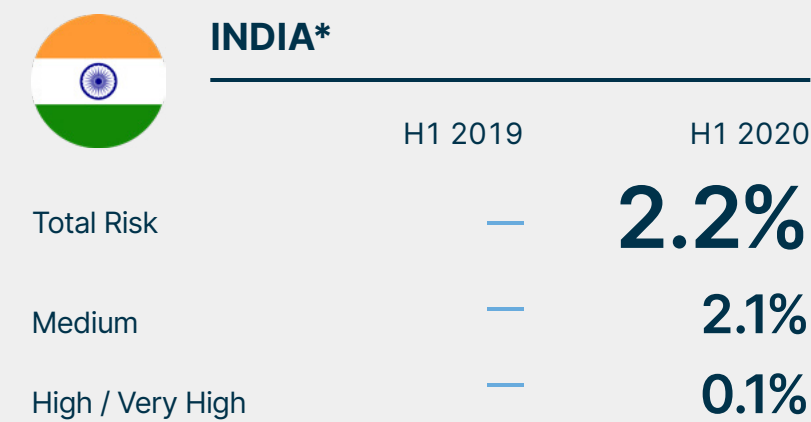
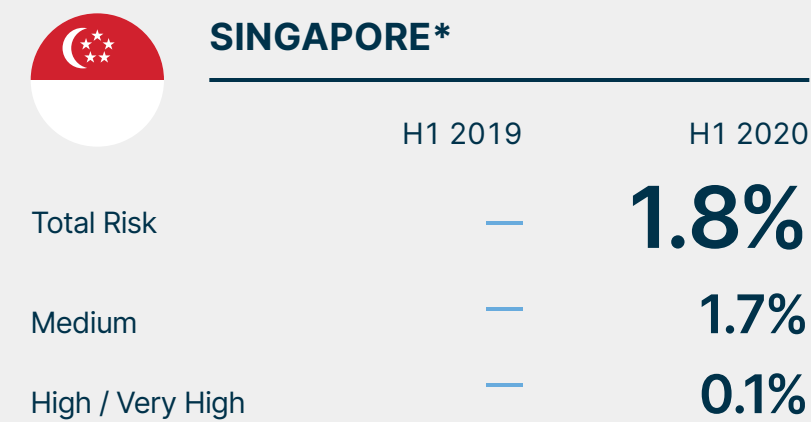


Brand Risk | Desktop Display



● H1 2019 ● H1 2020

WORLDWIDE
 Medium 4.7% 4.2%
 High / Very High 0.2% 0.2%



* prior year data not available

Brand Risk | Desktop Video



● H1 2019 ● H1 2020

WORLDWIDE
 Medium 6.9% 6.3%
 High / Very High 6.6% 6.0%
 0.3% 0.3%

AUSTRALIA

	H1 2019	H1 2020
Total Risk	5.0%	1.9%
Medium	4.9%	1.9%
High / Very High	0.1%	<0.1%

CANADA

	H1 2019	H1 2020
Total Risk	7.3%	3.5%
Medium	6.9%	3.4%
High / Very High	0.4%	0.2%

GERMANY

	H1 2019	H1 2020
Total Risk	14.3%	6.2%
Medium	14.1%	5.9%
High / Very High	0.2%	0.3%

UNITED STATES

	H1 2019	H1 2020
Total Risk	8.3%	8.0%
Medium	7.8%	7.5%
High / Very High	0.5%	0.5%

ITALY

	H1 2019	H1 2020
Total Risk	3.2%	2.5%
Medium	3.1%	2.4%
High / Very High	0.1%	0.1%

UNITED KINGDOM

	H1 2019	H1 2020
Total Risk	9.8%	5.7%
Medium	9.6%	5.4%
High / Very High	0.2%	0.3%

SPAIN

	H1 2019	H1 2020
Total Risk	4.4%	8.0%
Medium	4.1%	7.3%
High / Very High	0.3%	0.7%

FRANCE

	H1 2019	H1 2020
Total Risk	8.2%	8.6%
Medium	7.7%	7.7%
High / Very High	0.5%	0.8%

Brand Risk | Mobile Web Display



● H1 2019 ● H1 2020

WORLDWIDE **5.9%** **4.7%**
 Medium 5.6% 4.4%
 High / Very High 0.3% 0.3%

AUSTRALIA

	H1 2019	H1 2020
Total Risk	3.0%	2.2%
Medium	2.8%	2.0%
High / Very High	0.2%	0.2%

ITALY

	H1 2019	H1 2020
Total Risk	2.8%	2.6%
Medium	2.7%	2.4%
High / Very High	0.2%	0.2%

SPAIN

	H1 2019	H1 2020
Total Risk	5.5%	5.3%
Medium	5.1%	4.9%
High / Very High	0.4%	0.4%

GERMANY

	H1 2019	H1 2020
Total Risk	18.4%	6.7%
Medium	18.1%	6.4%
High / Very High	0.3%	0.3%

MEXICO*

	H1 2019	H1 2020
Total Risk	—	8.1%
Medium	—	7.2%
High / Very High	—	0.9%

SINGAPORE*

	H1 2019	H1 2020
Total Risk	—	2.5%
Medium	—	2.2%
High / Very High	—	0.2%

UNITED KINGDOM

	H1 2019	H1 2020
Total Risk	3.5%	3.3%
Medium	3.3%	3.1%
High / Very High	0.2%	0.3%

NEW ZEALAND

	H1 2019	H1 2020
Total Risk	5.2%	6.1%
Medium	5.0%	5.7%
High / Very High	0.2%	0.3%

UNITED STATES

	H1 2019	H1 2020
Total Risk	8.5%	6.7%
Medium	7.8%	6.3%
High / Very High	0.7%	0.4%

INDONESIA*

	H1 2019	H1 2020
Total Risk	—	9.3%
Medium	—	8.7%
High / Very High	—	0.5%

INDIA*

	H1 2019	H1 2020
Total Risk	—	2.6%
Medium	—	2.5%
High / Very High	—	0.1%

SWEDEN*

	H1 2019	H1 2020
Total Risk	—	4.6%
Medium	—	4.4%
High / Very High	—	0.1%

CANADA

	H1 2019	H1 2020
Total Risk	4.2%	6.7%
Medium	3.9%	6.4%
High / Very High	0.3%	0.3%

FRANCE

	H1 2019	H1 2020
Total Risk	8.8%	8.1%
Medium	8.3%	7.6%
High / Very High	0.5%	0.5%

JAPAN

	H1 2019	H1 2020
Total Risk	6.5%	10.9%
Medium	6.1%	10.6%
High / Very High	0.4%	0.2%

* prior year data not available

Brand Risk | Mobile Web Video



● H1 2019 ● H1 2020

WORLDWIDE
 Medium 7.8% 6.7%
 High / Very High 0.5% 0.4%

AUSTRALIA

	H1 2019	H1 2020
Total Risk	4.8%	1.9%
Medium	4.4%	1.7%
High / Very High	0.4%	0.2%

ITALY

	H1 2019	H1 2020
Total Risk	4.9%	2.9%
Medium	4.7%	2.7%
High / Very High	0.2%	0.2%

UNITED KINGDOM

	H1 2019	H1 2020
Total Risk	9.3%	6.3%
Medium	8.9%	6.0%
High / Very High	0.4%	0.3%

FRANCE

	H1 2019	H1 2020
Total Risk	10.8%	8.1%
Medium	10.2%	7.1%
High / Very High	0.6%	1.0%

CANADA

	H1 2019	H1 2020
Total Risk	9.8%	2.9%
Medium	9.0%	2.6%
High / Very High	0.8%	0.3%

GERMANY

	H1 2019	H1 2020
Total Risk	14.2%	5.6%
Medium	13.9%	5.2%
High / Very High	0.3%	0.4%

SPAIN

	H1 2019	H1 2020
Total Risk	5.6%	7.5%
Medium	5.1%	6.8%
High / Very High	0.4%	0.7%

UNITED STATES

	H1 2019	H1 2020
Total Risk	12.0%	9.9%
Medium	10.6%	9.0%
High / Very High	1.4%	0.8%

07

Spotlight

Advances in programmatic technology continue to enhance media quality

Over the past two years, automated ad sales have gained traction and sophistication around the world, supporting a rise in media quality levels along the way. Long-established markets in the Media Quality Report have seen widespread and sustained year-on-year gains driven by media quality improvements in programmatic inventory. Meanwhile, new entrants such as India, Mexico, and Singapore show significantly better results (i.e., higher viewability and time-in-view, lower ad fraud, and brand risk) for inventory sold programmatically compared to direct sales by publishers.

Key to this success is the continued evolution of our growing suite of media quality solutions that give ad buyers and sellers greater control in driving efficiencies, optimization, and content adjacencies that lead to better business outcomes.

Further gains are on the horizon. At IAS, we are committed to meeting the needs of our partners with innovative solutions that will continue to maximize the value of campaigns for advertisers and the inventory monetization opportunities for publishers.

Looking ahead



Automation & Efficiency

In 2020, marketers are looking to increase efficiency in two ways: saving money and saving time.

Saving money: Recently published research by ISBA showed 15% of programmatic ad spend was lost to “unknown deltas” in the supply chain.³ Recognizing the urgent need for more transparency, IAS partnered with Amino Payments to create Total Visibility – the first and only solution to provide radical financial transparency throughout the supply path so advertisers can see where their money is going.

Saving time: Our first-to-market ad server solution provides a streamlined and automated workflow that improves the tagging experience and reduces operational overhead, saving advertisers precious time. Currently in Alpha, Automated Tag is scheduled for general availability later this year. In addition, IAS's new Pre-bid Automation solution is now available for DSP integration, which will enable seamless automation of pre-bid segments within a DSP to align IAS pre- and post-bid settings without the risk of manual, human error.



Connected TV

CTV has significantly grown in usage and as the preferred platform for streaming content. 90% of consumers report having access to a CTV device, and 60% have added ad-supported CTV in 2020.⁴ This increase in consumption makes CTV the new battleground for fraud. IAS is the first and only partner to work directly with the largest video publishers to validate that CTV ads are played to completion and free from invalid traffic.

In 2020, we're continuing to grow our suite of solutions in this new environment with an alpha test of our latest pre-bid segment enabling users to programmatically filter out fraud in CTV. Looking ahead, we are currently researching how to deliver a brand safety solution in this environment for a top CTV platform.



Context Control

New privacy regulations and heightened consumer sensitivity are leading to the deprecation of cookies, making contextual targeting a key priority for marketers in 2020 and beyond. Additionally, 72% of consumers say that the content of a page can impact their perceptions of the ads around it.⁵ IAS is the only company to offer more tailored, brand-specific control over ad adjacencies, with Context Control dynamically detecting the context, sentiment, and emotions of a page to precisely and accurately classify content. In 2020, we're taking significant steps to expand our contextual capabilities.

1. Brand-specific and Extended categories for avoidance and targeting:

Our Context Control solution offers 100+ categories for content avoidance, available for both pre- and post-bid, as well as 100+ categories for contextual targeting available for pre-bid. This is an ongoing innovation for 2020 and beyond as we continue to create new, seasonal categories and expand coverage in more DSPs.

2. Granular reporting for failure reasons:

We're enhancing our reporting insights to show customers exactly why a given page fails for brand suitability by identifying the specific contextual category involved, giving our customers more granular insights and control.



Activation where it counts

Media strategies are expanding across platforms, and marketers need protection across all of these environments. IAS is rapidly expanding measurement capabilities in new and evolving platforms like Hulu, LinkedIn, Pinterest, TikTok, Twitch, and more. Additionally, we continue to innovate and build on our longstanding integrations with Facebook and Google so marketers can activate their brands everywhere it counts.

As our partners expand their campaigns to new environments, formats, and technologies, we will continue to push the boundaries of the Media Quality Reports as well. Look out for additional markets and new benchmarks in future editions of the report.

08

About IAS

Integral Ad Science (IAS) is the global leader in digital ad verification, offering technologies that drive high quality advertising media. IAS equips advertisers and publishers with both the insight and technology to protect their advertising investments from fraud and unsafe environments as well as to capture consumer attention, and drive business outcomes. Founded in 2009, IAS is headquartered in New York with global operations in 17 offices across 12 countries. IAS is part of the Vista Equity Partners portfolio of software companies. For more on how IAS is powering quality impressions for top publishers and advertisers around the world, visit integralads.com.

CONTACT US

info@integralads.com
www.integralads.com

FOLLOW US



Download additional MQR insights online:



END NOTES

1. Viewability rates exclude partially rendered impressions.
2. “Digital 2020 – April Global Statshot Report,” GlobalWebIndex as cited by We Are Social and Hootsuite, April 2020.
3. “ISBA Programmatic Supply Chain Transparency Study,” Incorporated Society of British Advertisers (ISBA) in partnership with Association of Online Publishers (AOP) and conducted by PricewaterhouseCoopers, May 2020.
4. “Streaming Wars – Wave 2,” Integral Ad Science, April 2020.
5. “Power of Context,” Integral Ad Science, August 2020.