



# GLOBAL INSIGHTS REPORT 2020

• DRIVING MEDIA QUALITY & PERFORMANCE WORLDWIDE •



## OVERVIEW

# DRIVING MEDIA QUALITY & PERFORMANCE WORLDWIDE

DoubleVerify's 2020 Global Insights Report taps into the billions of impressions we see monthly to explore media quality and performance trends worldwide. With in-depth analyses of brand suitability, fraud, viewability and performance, the report addresses key issues that advertisers face today as they seek to maximize return on their digital investment.

The 2020 Global Insights Report provides a market-by-market analysis of video and display impressions measured Year-over-year (YoY) - from May 2019 to April 2020, across desktop and mobile web, mobile app and CTV. The report includes 80 countries across Asia Pacific (APAC), Europe/Middle East/Africa (EMEA), Latin America (LATAM) and North America. In developing the report, DV analyzed data from advertisers representing over 2,000 brands.

### BRAND SUITABILITY



**14% Increase**

YoY Brand Suitability Rate



**32% Increase**

In Mobile App Brand Suitability  
Incident Rate

### FRAUD



**35% Decrease**

YoY Post-bid Fraud Rate



**161% Increase**

In CTV Fraud Rate  
Q1 2020 vs. Q1 2019

### VIEWABILITY



**9% Increase**

YoY Display Viewability



**8% Increase**

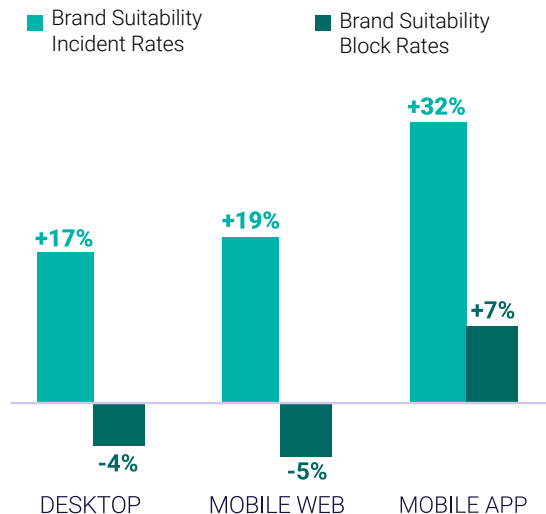
YoY Video Viewability

# RATE OF BRAND SUITABILITY VIOLATIONS GREW DRIVEN BY MOBILE APP

## Overall Brand Suitability Rate Increased

Globally, the Brand Suitability Rate increased 14% YoY to 7.6%. This describes all brand suitability violations — including both impressions that were blocked, and those that were measured and found to be outside of a brand's suitability parameters.

### YoY CHANGE IN BRAND SUITABILITY INCIDENT & BLOCK RATES

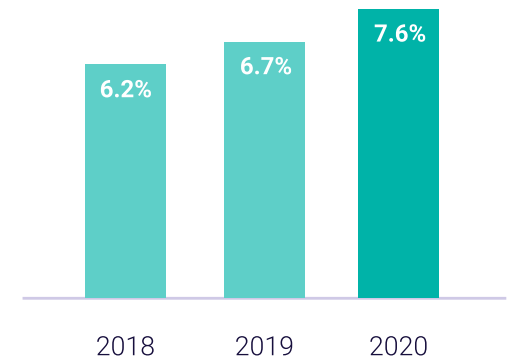


## Incident Rates Up

Across all devices, the Brand Suitability Incident Rate increased. This increase was most notable on mobile app, which increased 32% YoY, but increases were also seen on mobile web and desktop.

The Brand Suitability Block Rate also increased for mobile app, but declined for mobile web and desktop, resulting in an overall Block Rate decline of 3% YoY. 2020 is the first year the report notes trends in incidents vs. blocks. Brands are becoming more sophisticated in how they meet their suitability standards, with a growing desire to balance protection with the ability to scale, and support trusted publishers.

## OVERALL BRAND SUITABILITY RATE



## BRAND SUITABILITY INCIDENT & BLOCK RATES

The **Brand Suitability Incident Rate** records instances of ads being served on sites or apps, or adjacent to content that does not meet a brand's suitability parameters. Not all advertisers choose to block all brand suitability violations — they may be more interested in simply gaining transparency into incidents and using this data to inform their media strategy. When ads are blocked, this is called the **Brand Suitability Block Rate**. The overall **Brand Suitability Rate** is the combination of incidents and blocks.

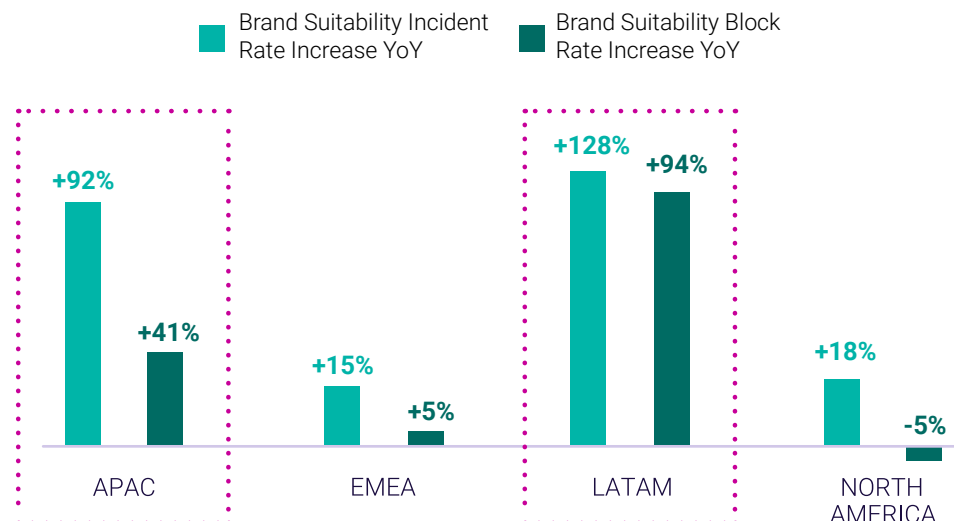
## Regional Spotlight: Early Days for Brand Suitability in APAC and LATAM

The change in Brand Suitability Incident Rate and Brand Suitability Block Rate for APAC and LATAM outpaced that of EMEA and North America.

When Brand Suitability was first introduced, brands in North America and EMEA quickly recognized the value of protecting their brand reputation online. Over time, their strategies for managing brand suitability have become more nuanced as advertisers have come to understand the tools at their disposal, and implement strategies both pre- and post-bid. Moreover, widespread adoption of DV's Authentic Brand Safety targeting solution in North America and EMEA has reduced discrepancies between post-bid blocking and pre-bid avoidance, further driving down block rates.

Media verification in APAC and LATAM is just starting to gain momentum. The initial focus has been on eliminating fraud. Brand Suitability strategies are just beginning to be adopted and refined. Overall Brand Suitability Incident and Block Rates increased dramatically in these regions. We anticipate these rates to decline over time, as brands employ pre- and post-bid brand suitability strategies in an effort to increase campaign efficiency.

### BRAND SUITABILITY RATE CHANGES BY REGION



## 2020: AN UNPRECEDENTED NEWS CYCLE

2020 has been a tumultuous year, with a news cycle dominated by the COVID-19 pandemic. Brands contended with how best to maximize campaign effectiveness, protect brand reputation, and support trusted news outlets that carried important messages to the public.

In response to COVID-19, many advertisers implemented stringent brand suitability measures that severely restricted scale. DV was at the forefront of issuing guidance to advertisers on how to:

- Exempt trusted news publishers from category avoidance.
- Review and refine keyword lists.
- Add trusted news site home pages and section home pages to exception lists.

Adoption of this guidance has had a material impact, helping brands balance protection and reach across trusted news publishers.

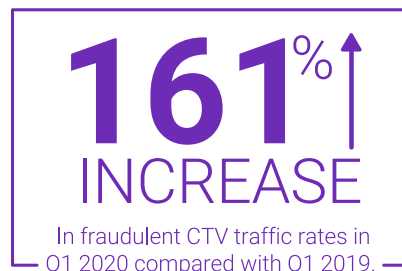
# CTV BOOMS...AND FRAUD FOLLOWS

## Global Fraud Rate Decline

Worldwide, the post-bid Fraud Rate across all devices declined 35% YoY — from 3.1% in 2019 to 2.0% in 2020. This decrease is likely due to the extensive use of programmatic pre-bid avoidance, which prevents fraudulent impressions from being transacted in the first place.

## Fraud Follows Ad Spend — Targets CTV

Unfortunately, fraud follows ad spend — especially within emerging channels like CTV, where measurement technologies are not widely adopted and demand outstrips supply. Since March 2019, DV has identified 1,300 fraudulent CTV apps — 60% of which were identified in 2020.

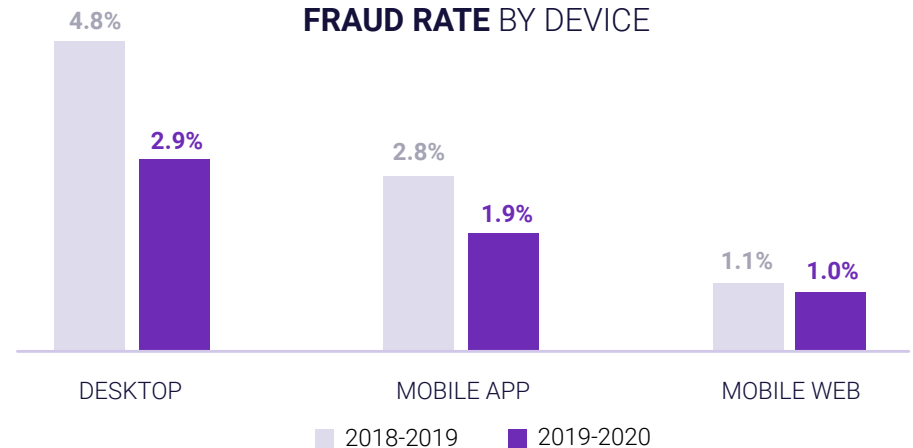


Also, DoubleVerify detected a 161% increase in fraudulent CTV traffic rates in Q1 2020 compared with Q1 2019.

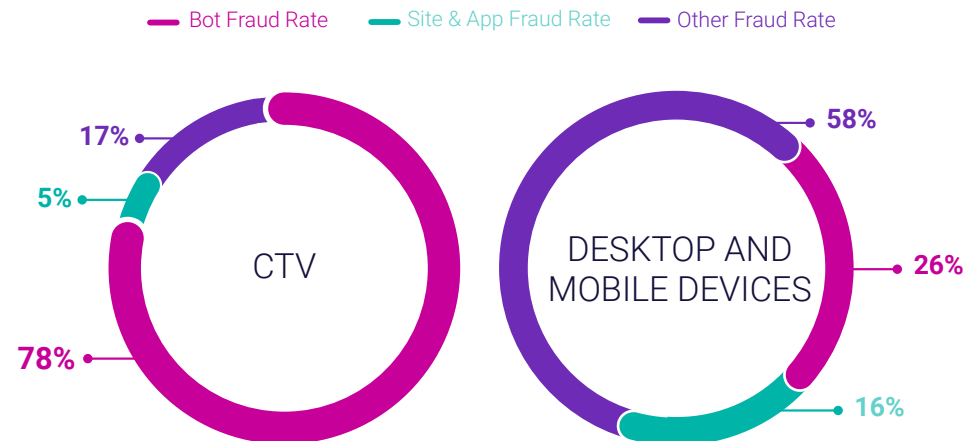
While bot fraud accounted for 26% of fraud violations overall, it was responsible for a whopping 78% of fraud

violations on CTV. With server-side ad insertion (SSAI) being standard in CTV environments, bots are able to mirror SSAI traffic to commit fraud at scale.

**FRAUD RATE BY DEVICE**



**FRAUD TYPES BY ENVIRONMENT**



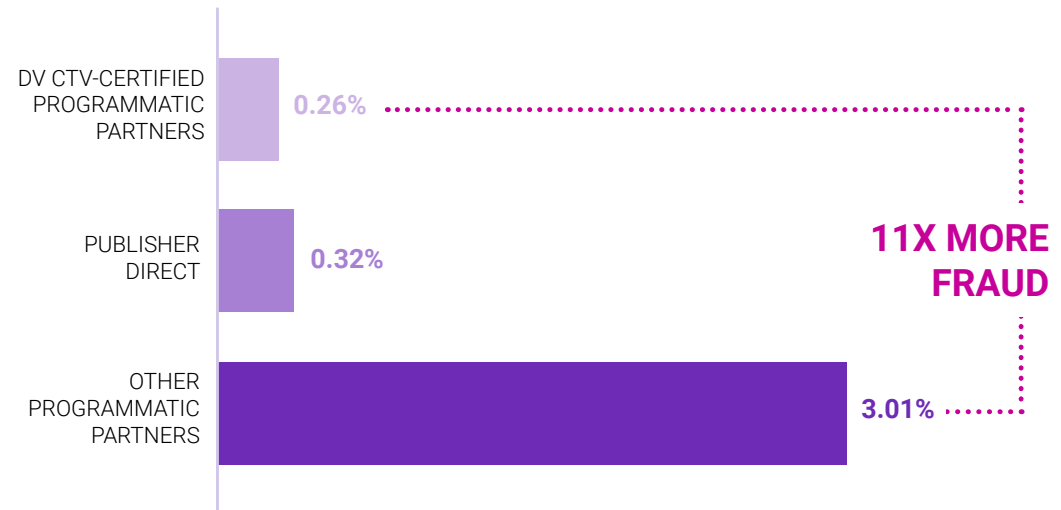
## CTV Fraud Based on Buying Channel

While CTV fraud impacts both programmatic and direct buying channels, inventory transacted through DV-certified programmatic marketplaces saw the lowest incidence of fraud, followed by direct and other programmatic supply. In fact, non-certified programmatic CTV saw a Fraud Rate over 11x higher than CTV transacted through DV-certified marketplaces, and approximately 9x higher than publisher-direct buys.

### Regional Spotlight: Mobile App Fraud Dropped in All Regions

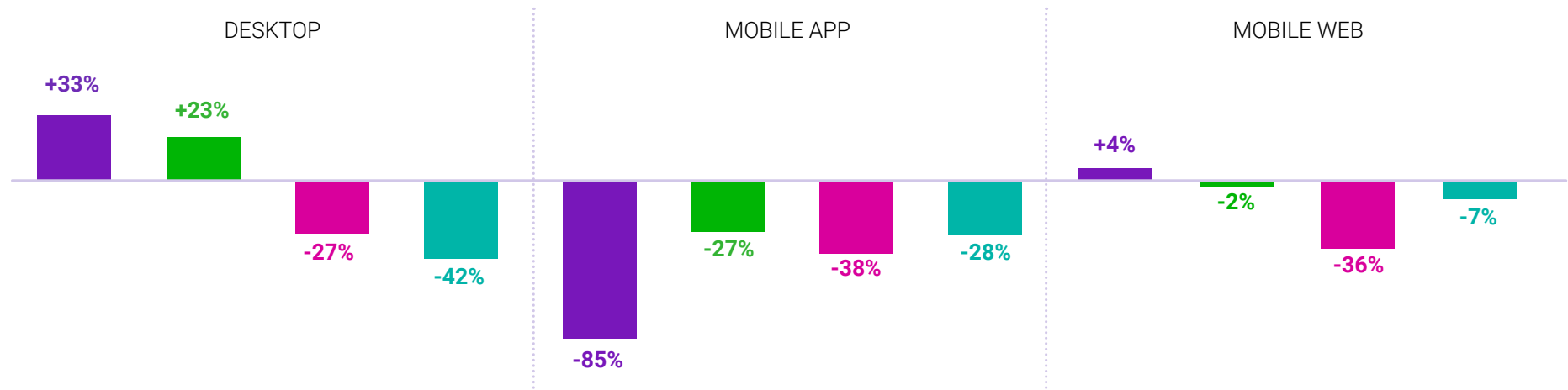
The decline in desktop fraud was led by LATAM and North America, while all regions saw a significant decline in the mobile app Fraud Rate. APAC and EMEA saw a significant uptick in desktop fraud.

## CTV VIDEO FRAUD RATES BY BUYING CHANNEL



## YoY CHANGE IN FRAUD RATE BY DEVICE AND REGION

APAC EMEA LATAM NORTH AMERICA



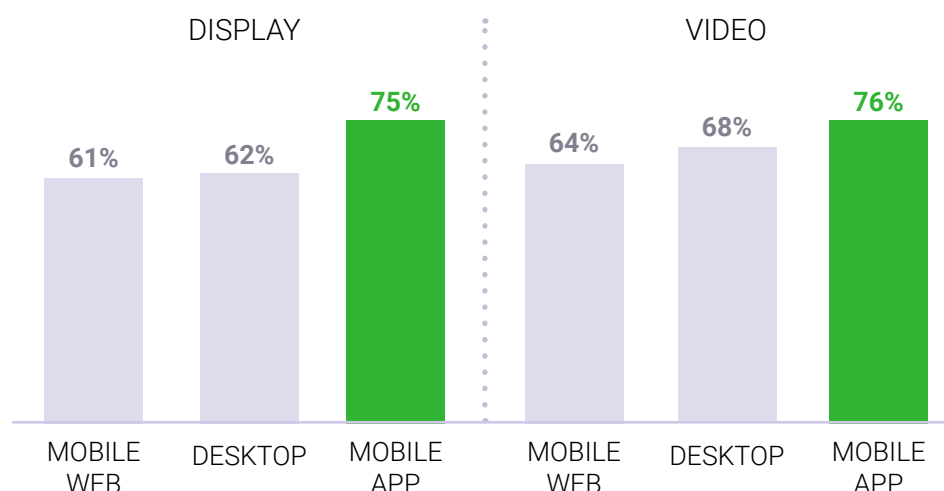
# VIEWABILITY CONTINUES TO RISE, LED BY MOBILE APP

## Viewability – Continued Improvement

Overall, viewability increased by 9% YoY - from 58% to 63%, with improvements seen across all devices and media types. Display Viewability Rates matched the overall rates, and the Video Viewable Rate increased 8% from 62% to 67%.

The mobile app Viewable Rate topped 75% for both display and video. During Q1 2020, the volume of mobile app traffic grew by 19% compared with the same period last year, and measured OM SDK impressions grew by 307%.

### VIEWABLE RATE BY MEDIA TYPE AND DEVICE

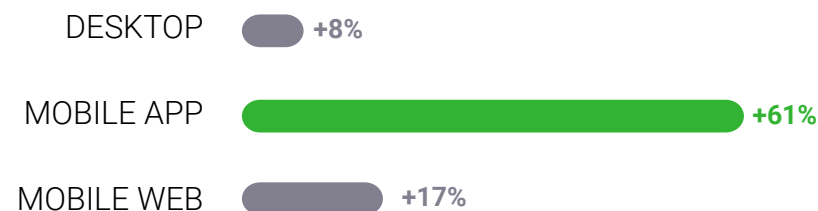


**Viewability Increased by 9% YoY, with Improvements Seen Across All Devices and Media Types**

## Video Measurability Up

Measurability describes the ability for viewability verification to occur in a given environment. Measurability is the foundation for viewability and is primarily driven by how an ad is tagged and the environment in which it is served. Compared with the past reporting year, the overall Measurable Rate for video increased by 14% while display held steady. The overall Measurable Rate for video increased on all devices — most notably mobile app. The increase in mobile app measurement can be attributed to the growing adoption of the IAB's OM SDK by supply partners.

### VIDEO VIEWABILITY MEASURED RATE INCREASES YoY



## Regional Spotlight: North America's Measurable Rate Lags Behind Other Regions

North America's video Measurable Rate lagged behind the combined Measurable Rate for APAC, EMEA, and LATAM by 16%.

DV contributes the gap, in large part, due to mobile app measurement which improved YoY in North America (+48%), but did not keep pace with the 92% increase observed in the other regions.

The gap between North America's and other regions' video Measurable Rate may be signaling that North American advertisers are not demanding that supply partners take necessary actions to enable video viewability.

### YoY CHANGE IN MEASURABLE RATE FOR MOBILE APP VIDEO BY REGION

APAC, EMEA,  
LATAM

**+92% YoY**

NORTH  
AMERICA

**+48% YoY**

## CTV & VIEWABILITY

Though there are no agreed-upon standards for viewability in CTV, the best proxy is Video Completion Rate (VCR), coupled with data about whether the ad was fully on-screen. DV provides this data so that advertisers can evaluate media quality across all channels using a similar yardstick.

Despite the assumption that all CTV is by its nature 100% viewable, we found that available 2020 data showed an overall Fully-on-Screen Rate of 88% and a VCR of 90%. Although these rates are high, they still represent an opportunity for advertisers to improve quality in premium environments.



Analysis of available 2020 data showed  
an overall Fully-on-Screen Rate of

**88%**



# NEWS CONTENT **DRIVES MEDIA PERFORMANCE**

## **DV Authentic Performance™**

Launched in early 2019, DV Authentic Performance™ is the first data solution in the market to provide real-time, comprehensive prediction data to drive campaign performance.

DV Authentic Performance™ builds on the DV Authentic Impression®, a proprietary, MRC-accredited metric that provides advertisers with a definitive measure of digital media quality. As a natural evolution, DV Authentic Performance™ overlays key performance measures onto DV Authentic Impression® delivery, enabling brands to optimize their digital strategies in real time.

DV Authentic Performance™ analyzes over 50 data points on the exposure of a digital ad and consumer's engagement with a digital ad and device – in real time. This rich dataset provides the basis for dynamic campaign optimization.

For the first time in this year's report, we are able to offer insight into relative exposure and engagement indexes across advertiser verticals and content types.



### **Exposure Index**

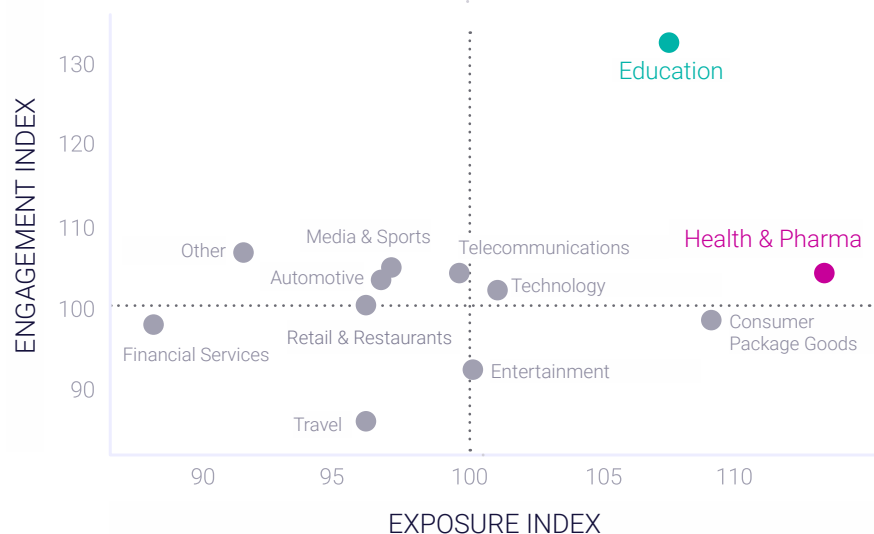
For exposure, DV Authentic Performance™ evaluates an ad's entire presentation, quantifying its intensity and prominence through metrics that include viewable time, share of screen, video presentation, audibility, and more.



### **Engagement Index**

For engagement, DV Authentic Performance™ analyzes key user-initiated events that occur at the device or ad level, including user touches, screen orientation, video playback, and audio control interactions.

## EXPOSURE & ENGAGEMENT INDEX BY VERTICAL



## Advertiser Vertical Performance

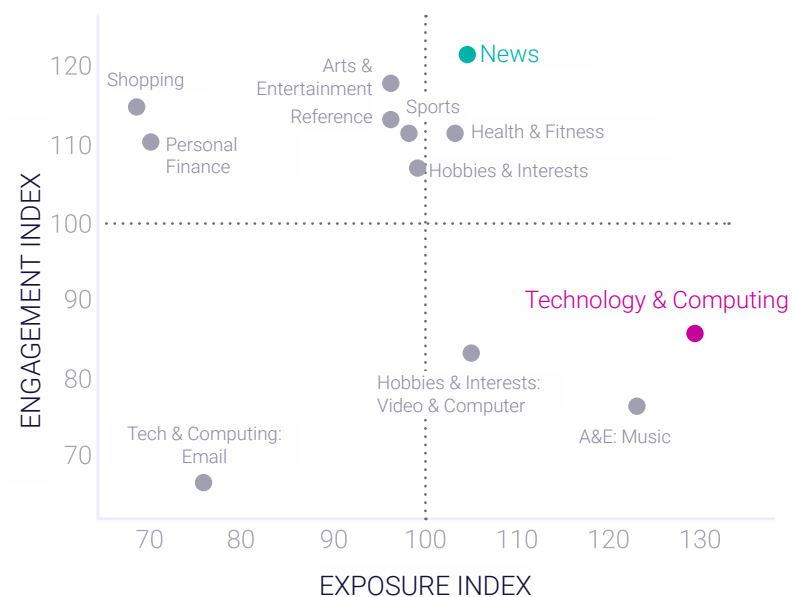
The Health & Pharmaceuticals advertiser vertical had the highest Exposure Index – exceeding the DV Authentic Performance™ Exposure benchmark by 13%. It follows that Health & Pharma, an industry vertical with advertising KPIs heavily focused on branding, led on this important measure.

The Education vertical had the highest Engagement Index – a measure of the likelihood a user is present and aware of an ad.

## Performance by Content Vertical

Among content verticals, News had the highest Engagement Index while Technology & Computing had the highest Exposure Index. It's important to note that the News content vertical exceeded Authentic Performance™ benchmarks for both Engagement and Exposure. Given a hyper-charged news cycle, advertisers have been very focused on threading the news/brand suitability needle. DV has led the way in providing advertisers with the tools and best practices to expand their reach to high performing News content without compromising brand protection.

## EXPOSURE & ENGAGEMENT INDEX BY CONTENT CATEGORY



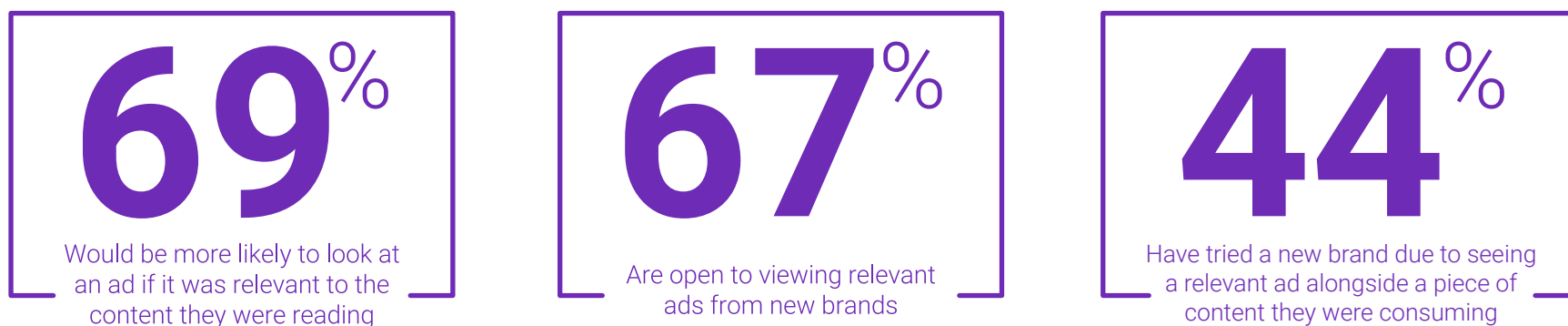
# THE RESURGENCE OF **CONTEXTUAL TARGETING**

## A Shift from Audience Targeting to Contextual Targeting

Until recently, advertisers looked to cookie-based audience targeting as the primary way to reach prospective consumers. Cookies provide advertisers with personalized information on a viewer and can be used to create a digital profile.

However, stricter data privacy regulations — such as General Data Protection Regulation (GDPR) in Europe, the California Consumer Privacy Act (CCPA) in the US, and the decision by most web browsers to sunset third-party cookies — there is a universal shift away from third-party audience targeting to contextual targeting.

## Consumers Open to Contextual Targeting



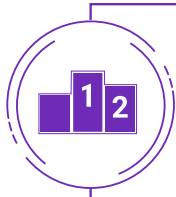
## Custom Contextual Targeting Powered by DoubleVerify

Built on two decades of trust and expertise in semantic-driven brand suitability classification, DV's Custom Contextual Targeting enables brands to reach their target consumer without the need of cookies. We've made advancements from simple keyword targeting to more sophisticated, machine-learning technologies that provide a holistic understanding of content and context.

This in-depth analysis allows brands to reach audiences in a more meaningful way, while also avoiding any sensitive content that may harm brand reputation.

## DV's Contextual Segments

Advertisers can choose from a range of contextual categories to help them meet both reach and precision objectives.



**IAB Tier 1 and Tier 2 Categories**  
for standard content targeting.



**Behavioral-Supplemental Categories**  
such as Autos & Vehicles and Consumer Electronics to target content relevant to in-market audiences.



**Seasonal Categories**  
such as Halloween and Black Friday that align with common campaign themes.



**Customized Brand-Specific Categories**  
to meet specific needs of a brand - drawing on DV's 200,000+ contextual concepts.

From a centralized location within the DV Pinnacle® platform, advertisers can build custom segments based on over 430 IAB categories, as well as seasonal, behavioral and custom categories. Segments can be tailored to include site, app and language inclusions and exclusions and specific URL keyword lists. Advanced settings — such as the ability to include unclassified content and site and app exception lists — help unlock incremental campaign scale. Additional controls, such as including only content that has been classified at the page level, helps make targeting more precise.

## The Benefits of DV's Custom Contextual Targeting

- Goes beyond keywords and classifies content by analyzing the contextual meaning of each page using a rich ontology with **over 200,000 language-independent concepts**
- Supports **consumer privacy**
- Improves **operational efficiency** by allowing advertisers to create one profile that can be syndicated to all DSPs
- **Extends reach** for campaigns that are looking for additional scale
- **Maximizes value** by providing advertisers with custom and brand-specific contextual profiles
- **Reduces ad fatigue** as the viewer only sees an ad in the appropriate context

## LOOK AHEAD

# DV BRINGS **THE AUTHENTIC IMPRESSION®** TO CTV

Advertiser demand for Connected TV (CTV) inventory continues to increase due to the fast growing of CTV audiences, the measurability of digital video, and the appeal of sound and motion on the living room's biggest screen.



### Fraud Targets CTV

DV's Fraud Lab employs a rigorous process to evaluate and identify ad fraud on CTV. We monitor hundreds of data points on every impression, analyzing traffic patterns and leveraging numerous human-tuned algorithms to identify anomalies across different devices and media types. We also operate a dedicated CTV hardware lab with a sandbox environment where app code and logs are decompiled and analyzed. With these capabilities, DV is protecting clients and partners from the growing wave of CTV fraud.



### Bringing Transparency to CTV

CTV also has a transparency challenge. Without transparency, measuring brand safety and suitability for CTV buys is almost impossible. While the technology to measure this information is available, publishers need to build support for it and make sure they are supplying advertisers with reliable information about where their ads are running. In January 2020, DV rolled out transparency reporting for CTV — giving advertisers clarity into their placements across apps and platforms. In September, we will be rolling out inclusion and exclusion lists — giving advertisers insights into whether ad placements are within or outside the bounds of their media plans.



### Viewability

Traditional viewability measurement requires VPAID or a measurement SDK, such as OM SDK — neither of which are supported in CTV environments today. To address these deficits, DV is offering a strong proxy for viewability by certifying that ads are fully on screen, coupled with quartile completion. However, additional work needs to be done to deliver a universally agreed-upon measure.

### A Definitive Measure of Quality

Our goal is to extend DoubleVerify's Authentic Impression®, a definitive measure of media quality, to all channels — including CTV. To accomplish this we are: 1) Taking a cross-platform/device approach, leveraging one Video OmniTag; 2) Using industry standards such as VAST that are scalable in a CTV environment; and 3) Collaborating with the IAB and publishers on the adoption of scalable standardized solutions.



## BENCHMARKS

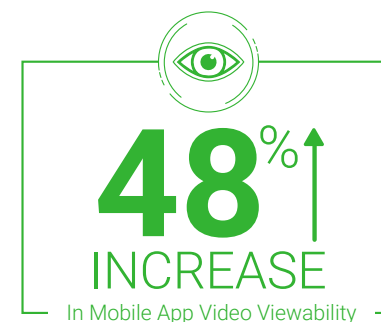
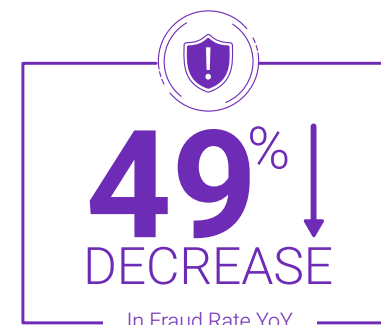
# APAC

Asia Pacific (APAC) covers 15 countries. We have included the top 9 in our benchmarks. While verification is relatively new to the region, some interesting trends have emerged. For example, the overall Brand Suitability Rate increased 66% YoY to 11.4% – outpacing the more mature markets of North America and EMEA, where rates are generally lower. This trend was led by high Brand Suitability Rates in both Malaysia and the Philippines.

That said, the post-bid Fraud Rate declined 49% YoY, most likely due to the increased usage of pre-bid fraud protection. The steepest dip in YoY rates was in India, where post-bid fraud incidents declined by 81%.

The Viewable Rate improved YoY for display (2020: 59%, 2019: 54%) and was flat for video (2020: 66%, 2019: 66%). Overall video viewability remained relatively stable – although the rate for Malaysia rose by 78%, Vietnam by 31%, and Australia by 14%, and mobile app video viewability rose by 48% overall.

It is good to note, however, that the Authentic Rate increased YoY for both display and video, showing that quality overall is on the rise.





# BENCHMARKS APAC

QUALITY METRICS by Region and Country

	Display Viewable	Video Viewable	Fraud	Brand Suitability
Australia	64%	79%	1.4%	14.7%
India	61%	55%	0.6%	7.5%
Indonesia	67%	73%	1.4%	6.2%
Japan	48%	42%	0.6%	9.5%
Malaysia	71%	88%	0.3%	27.9%
Philippines	64%	62%	0.6%	15.5%
Singapore	58%	69%	1.3%	12.7%
Thailand	65%	49%	0.8%	10.5%
Vietnam	51%	75%	0.6%	7.8%
<b>TOTAL</b>	<b>59%</b>	<b>66%</b>	<b>0.9%</b>	<b>10.7%</b>

## AUTHENTIC RATE<sup>1</sup>



<sup>1</sup>Authentic Impressions are those that are collectively fraud-free, viewable, brand-safe and in-geo

## BENCHMARKS

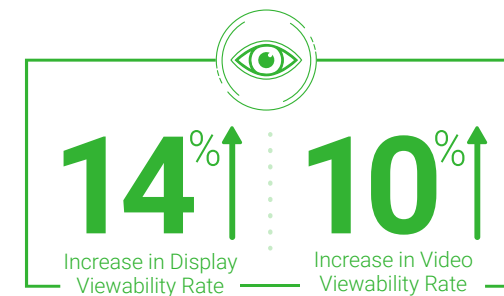
# EMEA

Europe, Middle East and Africa (EMEA) covers 41 countries. The Global Insights Report benchmarks covers 9 key markets, representing all sub-regions. This year saw an increase of Brand Suitability Rates by 24% YoY to 9.8%, led by high YoY increases in Russia (+370%) and South Africa (+194%).

The post-bid Fraud Rate increased by 13% YoY to 2.0%. EMEA is the only geographic region that experienced an increase in the Fraud Rate — driven largely by Fraud Rate increases in France and UAE.

On a more positive note, Viewable Rate improved YoY for display (2020: 61%, 2019: 52%) and video (2020: 76%, 2019: 70%), where it is currently the highest globally.

Authentic Rate increased YoY for both display and video.







## BENCHMARKS EMEA

QUALITY METRICS by Region and Country

	Display Viewable	Video Viewable	Fraud	Brand Suitability
France	56%	70%	3.3%	11.5%
Germany	49%	67%	1.6%	10.4%
Italy	52%	80%	0.8%	11.2%
Russia	41%	71%	1.4%	18.6%
South Africa	54%	58%	0.7%	17.4%
Spain	57%	81%	0.7%	10.5%
Turkey	58%	82%	0.4%	8.0%
United Arab Emirates	47%	77%	3.6%	7.5%
United Kingdom	64%	73%	2.3%	9.0%
<b>TOTAL</b>	<b>61%</b>	<b>76%</b>	<b>2.0%</b>	<b>9.8%</b>

### AUTHENTIC RATE<sup>1</sup>



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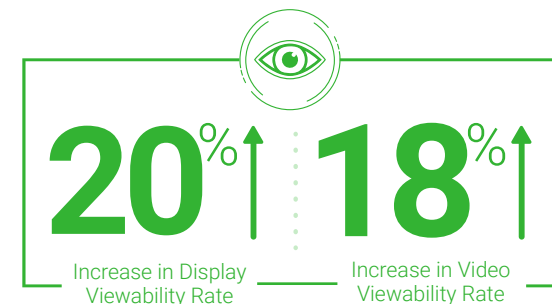
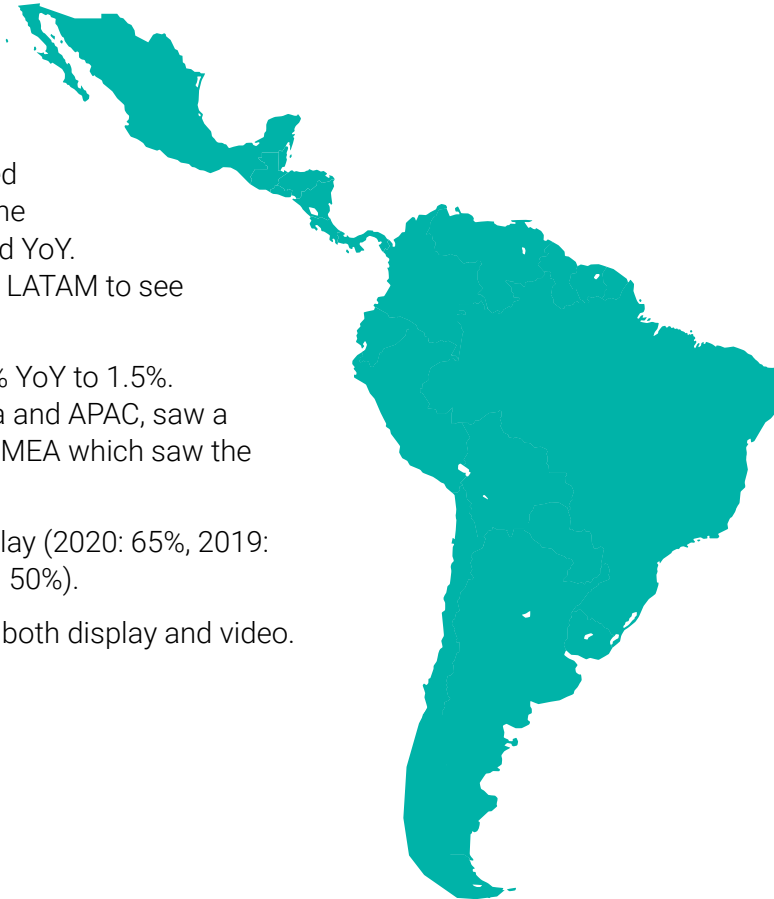
# LATIN AMERICA

Latin America (LATAM) covers 17 countries. In this region the overall Brand Suitability Rate increased by a whopping 109% YoY to 12.3%. This exceeded all other regions and represents the only region where the rate doubled YoY. Argentina was the only country in LATAM to see a decline.

The Fraud Rate decreased by 41% YoY to 1.5%. LATAM, along with North America and APAC, saw a decline in the Fraud Rate, unlike EMEA which saw the rate increase.

Viewability improved YoY for display (2020: 65%, 2019: 54%) and video (2020: 70%, 2019: 50%).

Authentic Rate increased YoY for both display and video.





## BENCHMARKS

# LATIN AMERICA

QUALITY METRICS by Region and Country

	Display Viewable	Video Viewable	Fraud	Brand Suitability
Argentina	76%	72%	1.3%	6.8%
Brazil	64%	73%	1.5%	11.5%
Colombia	46%	81%	2.2%	27.9%
Mexico	67%	63%	1.6%	12.2%
<b>TOTAL</b>	<b>65%</b>	<b>70%</b>	<b>1.5%</b>	<b>12.3%</b>

## AUTHENTIC RATE<sup>1</sup>



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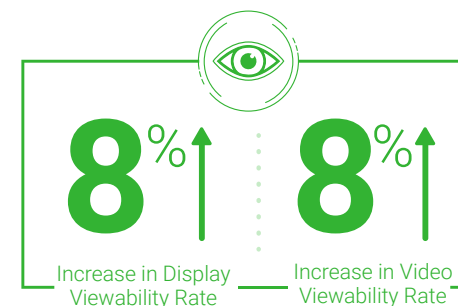
# NORTH AMERICA

Canada and the United States make up North America. In this region, the overall Brand Suitability Rate increased by 11% YoY to 7.3%. That said, North America has the lowest Brand Suitability Incident Rate among geographic regions, and the rate for mobile web brand suitability incidents was less than half the rate in all other regions.

The Fraud Rate decreased by 38% YoY to 2.1%.

The Viewable Rate improved YoY for display (2020: 64%, 2019: 59%) and video (2020: 66%, 2019: 62%), this rate lags behind EMEA and LATAM.

Authentic Rates in North America climbed this year to 60% for display and 62% for video, an upward trend in overall quality that is consistent worldwide.





## BENCHMARKS

# NORTH AMERICA

QUALITY METRICS by Region and Country

	Display Viewable	Video Viewable	Fraud	Brand Suitability
Canada	56%	71%	2.0%	12.7%
United States	64%	66%	2.1%	7.1%
<b>TOTAL</b>	<b>64%</b>	<b>66%</b>	<b>2.1%</b>	<b>7.3%</b>

## AUTHENTIC RATE<sup>1</sup>



<sup>1</sup>Authentic Impressions are those that are collectively fraud-free, viewable, brand-safe and in-geo

## BENCHMARKS

# INDUSTRY VERTICAL

Understanding quality metrics through an industry lens provides insight into what KPIs different verticals value. For example, CPG and Health & Pharma campaigns are generally more branding-oriented, so it is not surprising to see viewability figures that are, on the whole, higher. On the other extreme, Telecommunications and Financial Services campaigns are typically more direct-response focused — meaning they're less likely to be concerned with overall viewability as a measure of success.

The Brand Suitability Rate was highest in the Travel category, followed closely by Entertainment — primarily because these brands have bursts of high volume, and run many custom and takeover buys with shorter flights that limit the opportunity to optimize campaigns.

Fraud was highest in Media & Sports, Travel, Financial Services and Technology industry verticals. This follows a trend from previous years, as these verticals are typically targets for bot fraud.



**The Brand Suitability Rate  
was highest in the Travel  
category**



**Fraud was highest in Media  
and Sports, Travel, Financial  
Services & Technology  
industry verticals**



**Viewability Rates were  
highest in CPG and  
Health & Pharma**

## BENCHMARKS

# INDUSTRY VERTICAL

	Display Viewable	Video Viewable	Fraud	Brand Suitability
Automotive	58%	61%	2.0%	6.4%
Consumer Package Goods	69%	71%	1.5%	7.6%
Education	68%	68%	2.1%	6.2%
Entertainment	56%	68%	2.1%	10.7%
Financial Services	57%	63%	2.4%	9.3%
Health & Pharma	67%	65%	1.8%	7.3%
Media & Sports	64%	61%	3.0%	9.0%
Other	69%	72%	1.9%	7.7%
Retail & Restaurants	67%	72%	2.1%	7.2%
Technology	64%	61%	2.2%	6.1%
Telecommunications	55%	66%	2.1%	6.7%
Travel	64%	70%	2.9%	13.3%

Let's Build a **Better Industry**®



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