



# IAB Canada

*Barometer Report:*

**The State of Brand Safety in Canada 2018**

Member Survey Results

# Introduction

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## Background

Brand safety is a top priority for the supply chain in 2018 among our members i.e. Critical to ensure ads do not land next to inappropriate or pirated content

## Purpose

Member survey intended to help IAB Canada assess best practices and minimum technical requirements that advertisers, agencies and publishers have in place, for delivering brand safety to advertisers.

## Methodology

- 15-Minutes Survey questionnaire, sent to member database
- Perceptions based on "past six months"
- 70% of sample = agencies and publishers/content platforms
- In field January 16- February 9, 2018
- Respondent identity and answers confidential, results reported in aggregate only

# Survey Highlights

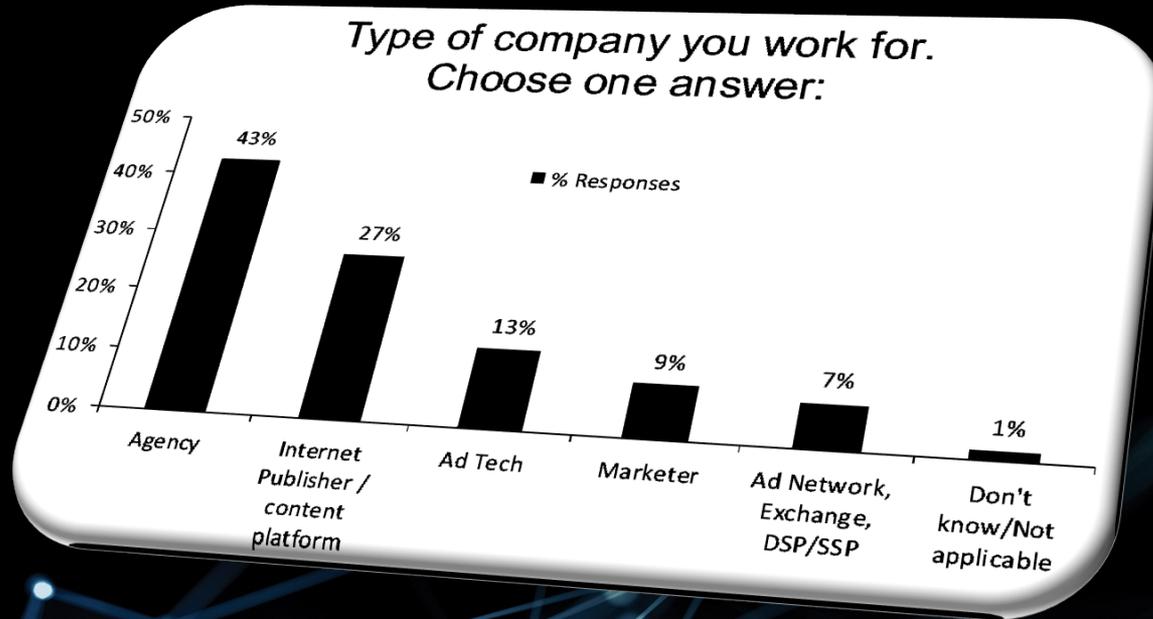
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## The Balancing Act – Scale / Safety

- Brand safety is a serious issue and it's a live problem.
- The backlash is difficult to quantify – risk aversion seems to be the key
- The definition of brand safety has changed over time
- Video and scale tactics and social media are cited as increased areas of risk
- Technology is being used ...BUT
- Prevention vs. Post is key
- There is a perceived pressure on scale
- A lot of issues are being addressed

# Who Responded

Buy-Side represented over 50%

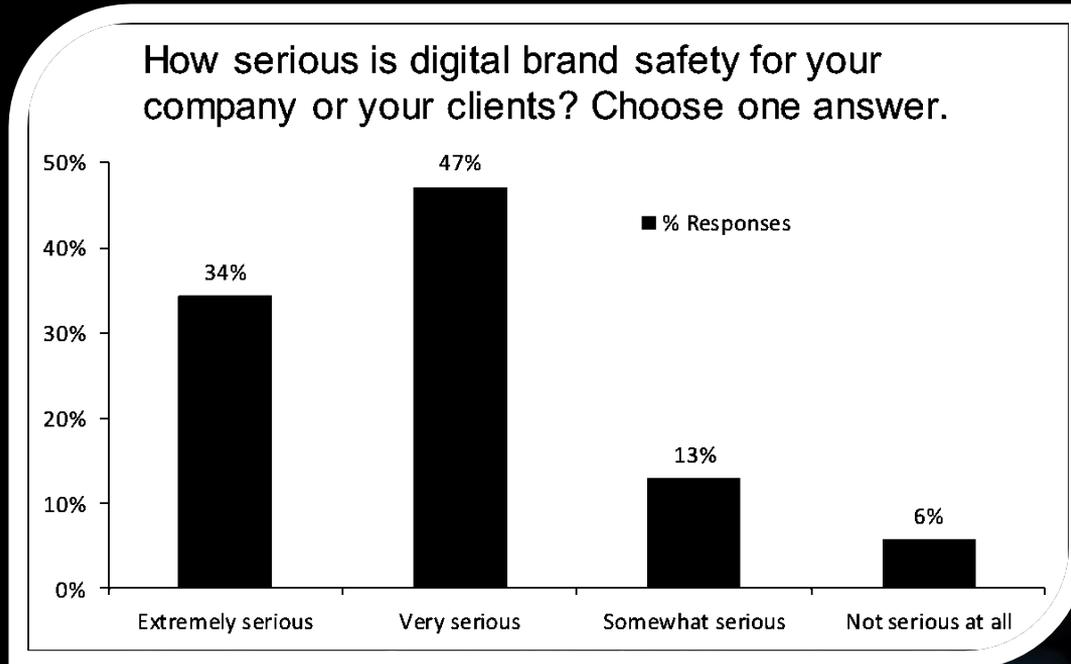


# The Brand Safety Issue

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# Brand Safety is a Serious Issue

Over 90% assign some degree of seriousness to brand safety



# It's a Live Problem

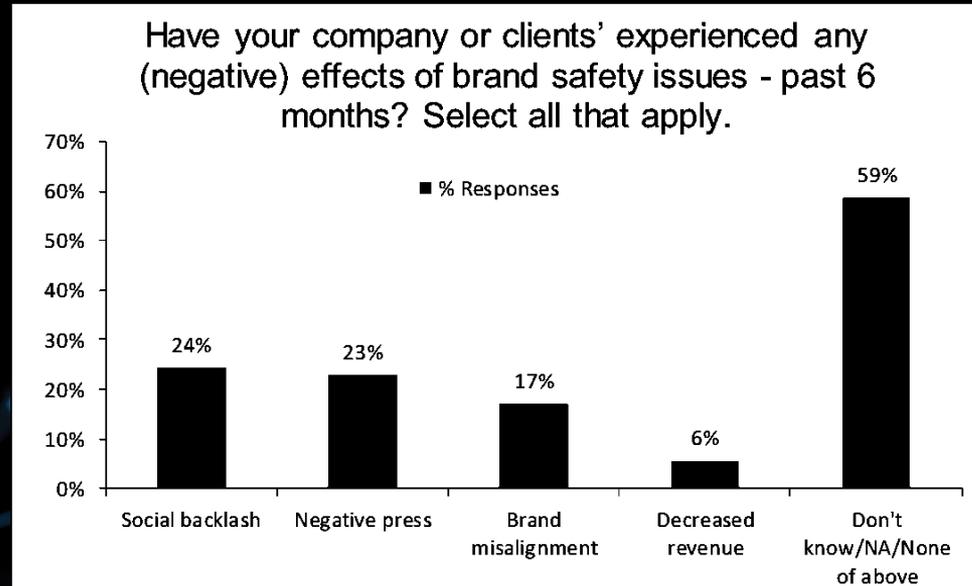
Just under 70% experienced at least one brand safety issue in the past 6 months – half experience them more often



# Backlash Difficult to Quantify

Social backlash and Negative Press most identified, as fallout from brand safety issues. 59% don't know the impact.

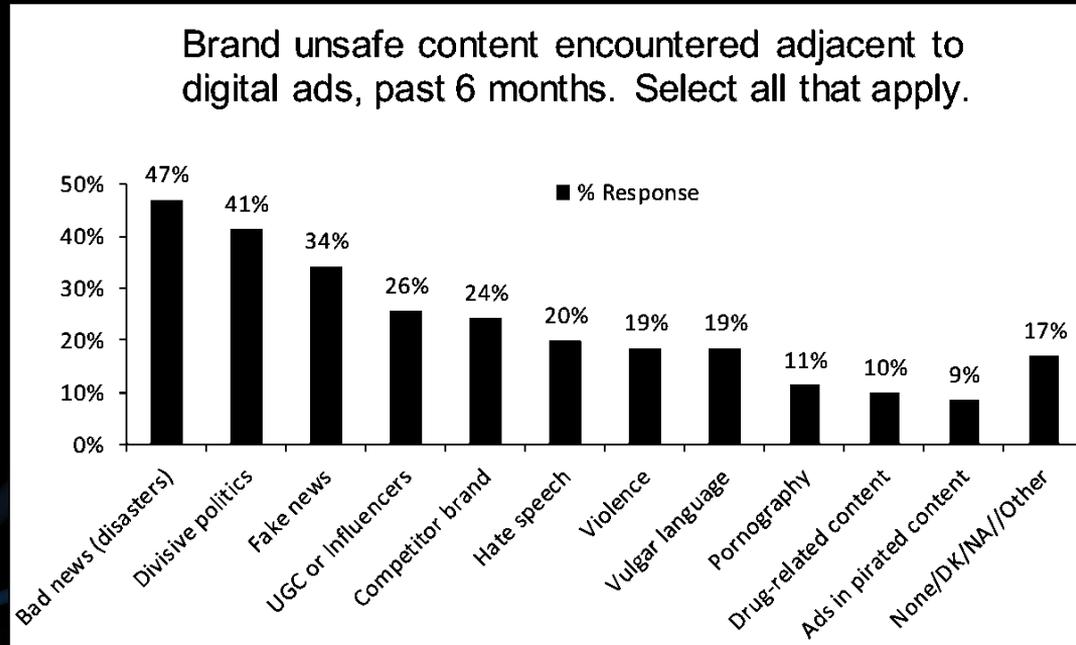
**Brand mis-alignment is next most cited outcome.**



# Brand Safety in 2018 - *Redefined*

Top 3 most encountered unsafe content - Bad news, divisive politics and fake news.

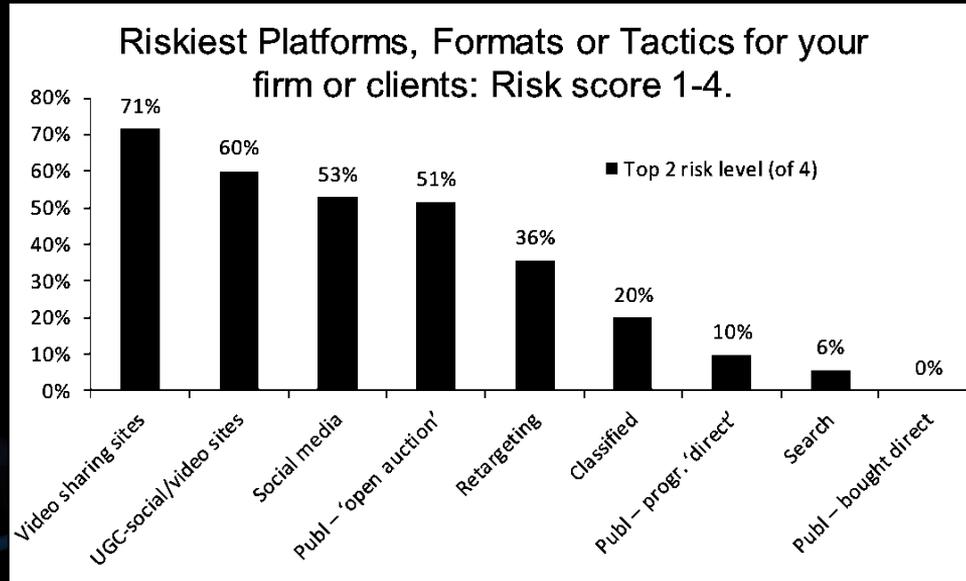
Least encountered are...  
pornography, drug-related content and pirated content.



# Video and Scale Tactics Increase Risk

Riskiest platforms or tactics: Led by video sharing sites, UGC and sites bought via open-auction.

**Least cited...  
sites bought  
directly, via  
programmatic-  
direct and  
Search.**

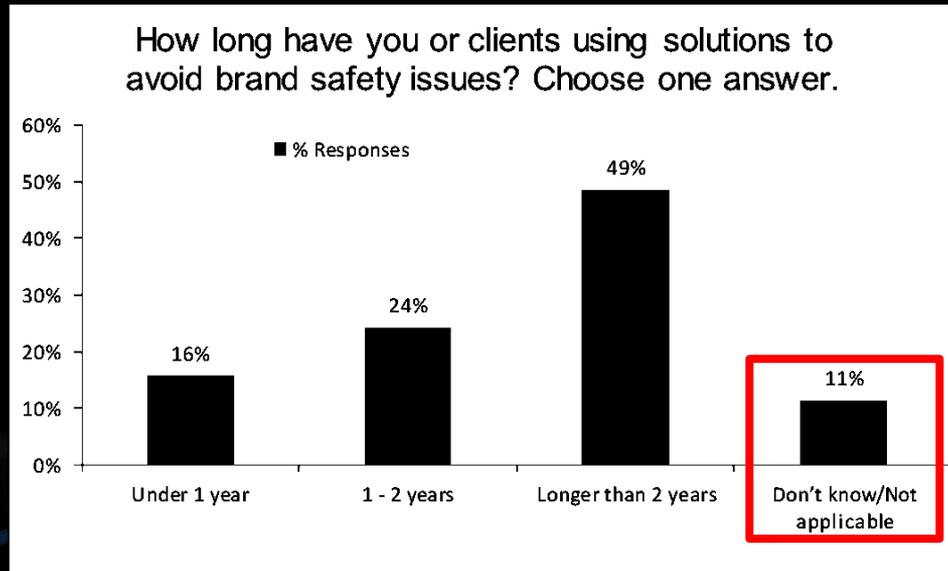


# Preventative Measures

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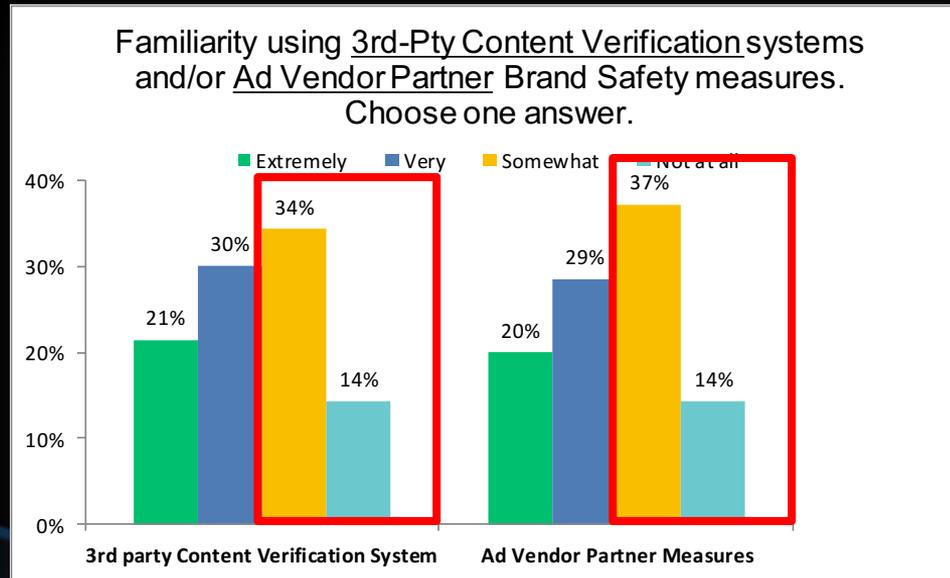
# Technology is Being Used

Almost 90% are using technologies/solutions to avoid brand safety issues  
- half over two years



# Half are unfamiliar with Brand Safety Solutions

Half claim to be very/extremely familiar with using various technologies/solutions to avoid brand safety issues.



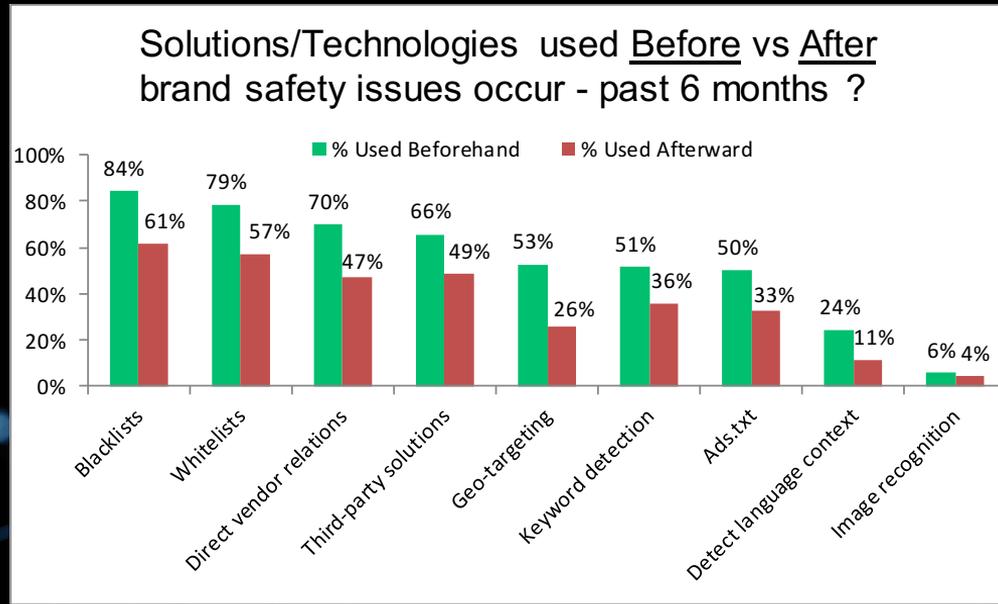
# Prevention Measures Outweigh Post Issue

Solutions used to combat brand safety issues BEFORE/AFTER they happen  
– more commonly BEFORE

## *Most used solutions:*

**blacklists, whitelists,  
direct vendor  
dealings and third  
party solutions.**

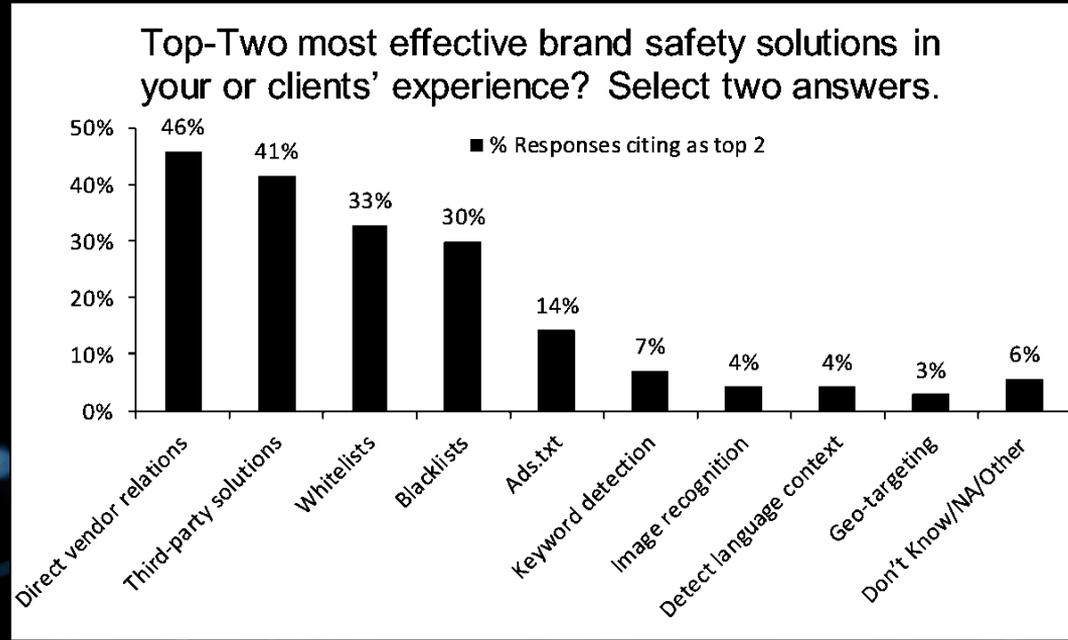
**Rapid Adoption of  
Ads.txt**



# Prevention Measures Outweigh Post Issue

Top 2 most effective brand safety measures: Direct Vendor dealings and third party solutions

Runners-up are whitelists and blacklists.



# The Impact of Brand Safety

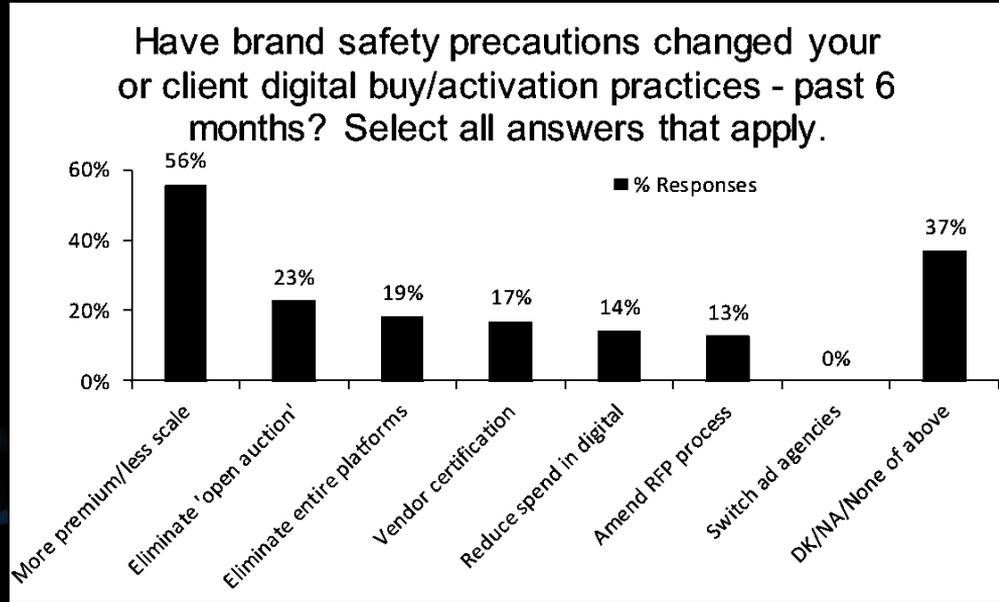
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# Quality over Quantity

Most notable change to digital buys arising from brand safety precautions:  
More premium sites, less scale

*Next most common change:*

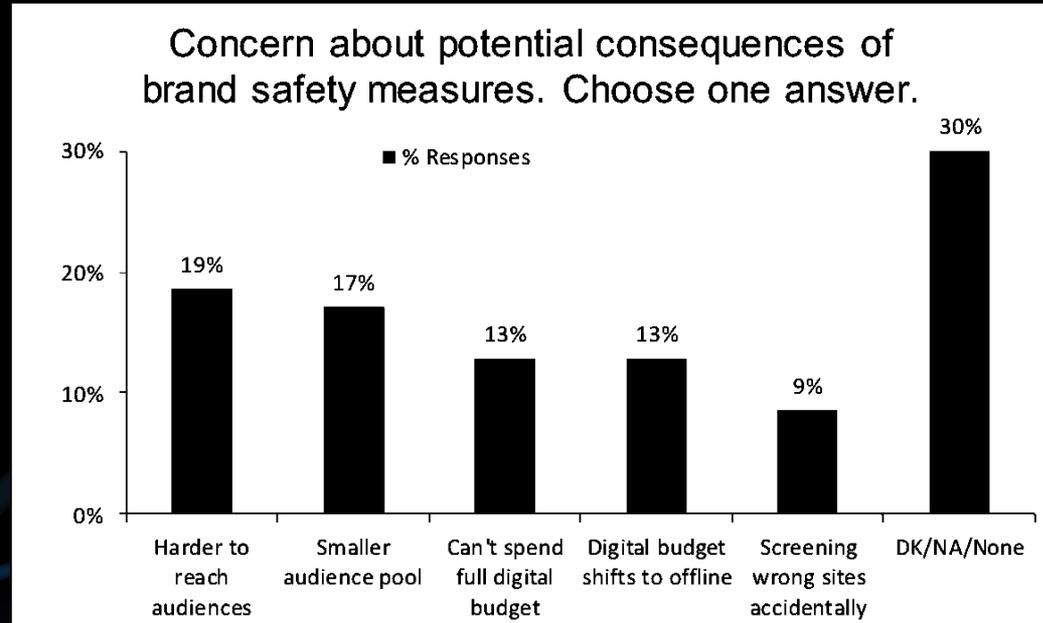
**elimination of programmatic buys via open auction.**



# Safety is Putting Pressure on Scale

Concern about harder to reach audiences as a consequence of brand safety measures.

**Accidentally screening the wrong sites a minor matter.**

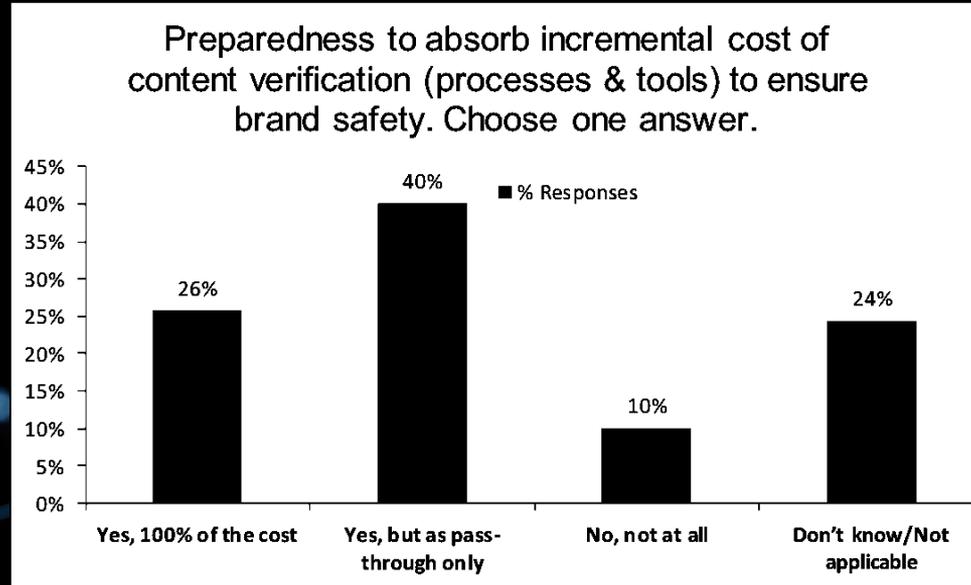


# Clients Take on Cost of Brand Safety

Only one-quarter advise their firms are prepared to absorb 100% of content verification cost.

Agency sample  
dominates 'Pass-through' response.

Publisher sample  
evenly split between yes, pass-through and not at all.



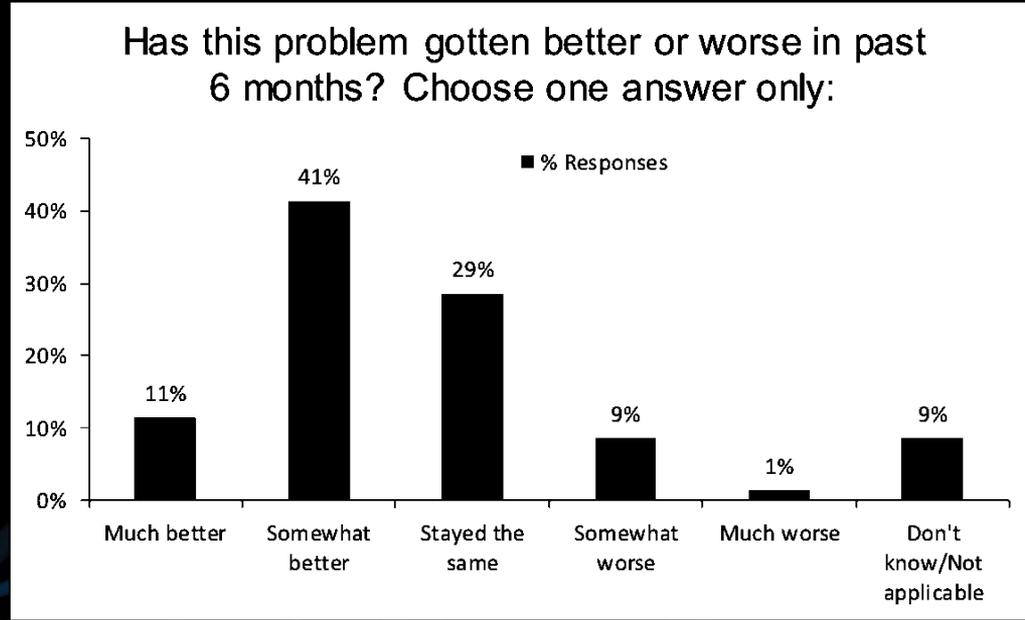
# Prognosis

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# Brand Safety Appears to be Improving

Over half say brand safety has improved in the past 6 months

**Almost 30% report no change in brand safety status.**



# Conclusion

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This report finds that the IAB Canada members who participated in this Barometer survey are well-informed about the Brand Safety challenge and many have been using effective counter-measures.

IAB Canada continues to work with our members to identify solutions, promote standards and offer education courses to the industry, that we anticipate will facilitate further progress over time. A follow-up survey will be conducted to measure this progress.

Many thanks to all the members who participated in this survey.

# Appendix

Additional Findings

# Survey Highlights

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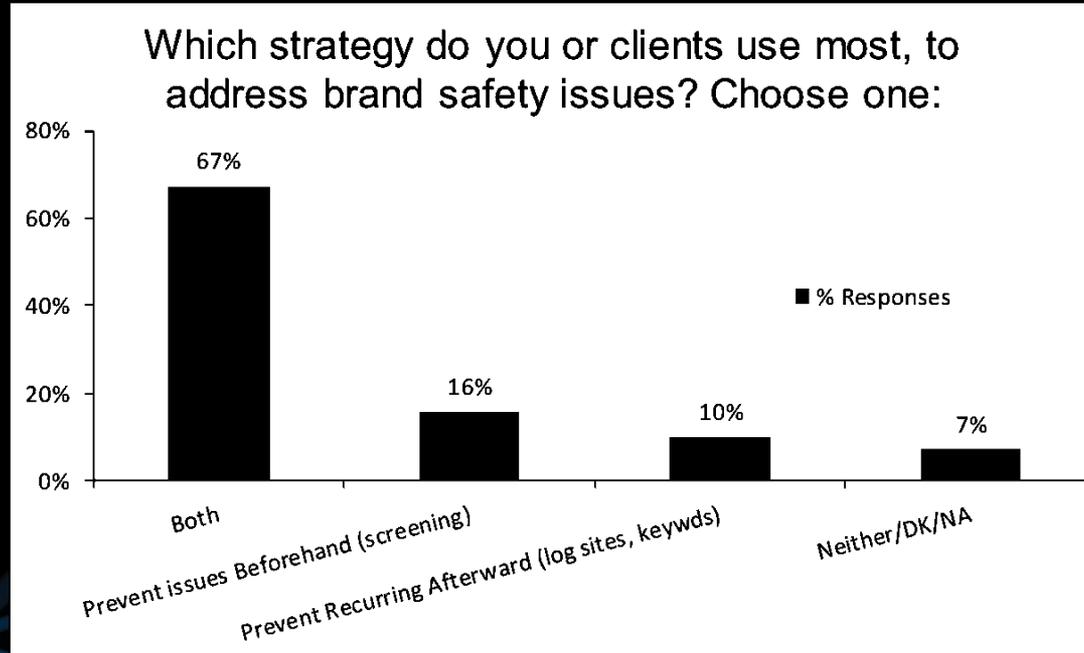
## The Balancing Act – Scale / Safety

- Most of the sample have experienced brand safety issues and consider it very/extremely serious.
- Social backlash and Negative press are cited most as fall-out
- Brand safety policies tend to be documented and technologies / solutions in wide use
- Half the sample 'very/extremely familiar' using these solutions and believe brand safety situation has improved.
- Top 3 most common unsafe content: Bad news, divisive politics and fake news.
- Top 3 riskiest platforms/tactics: Video sharing sites, UGC, open-auction sites.
- Top-2 most effective measures: Direct vendor dealings, third party solutions.
- Biggest digital buy changes - more premium sites, less scale / concern about smaller audience pool

# Double-Duty Measures

Two-thirds us both “Preventative” and “Post-facto” measures to combat brand safety

**A tiny minority use only one or the other strategy.**



# Most Buyers have Policies

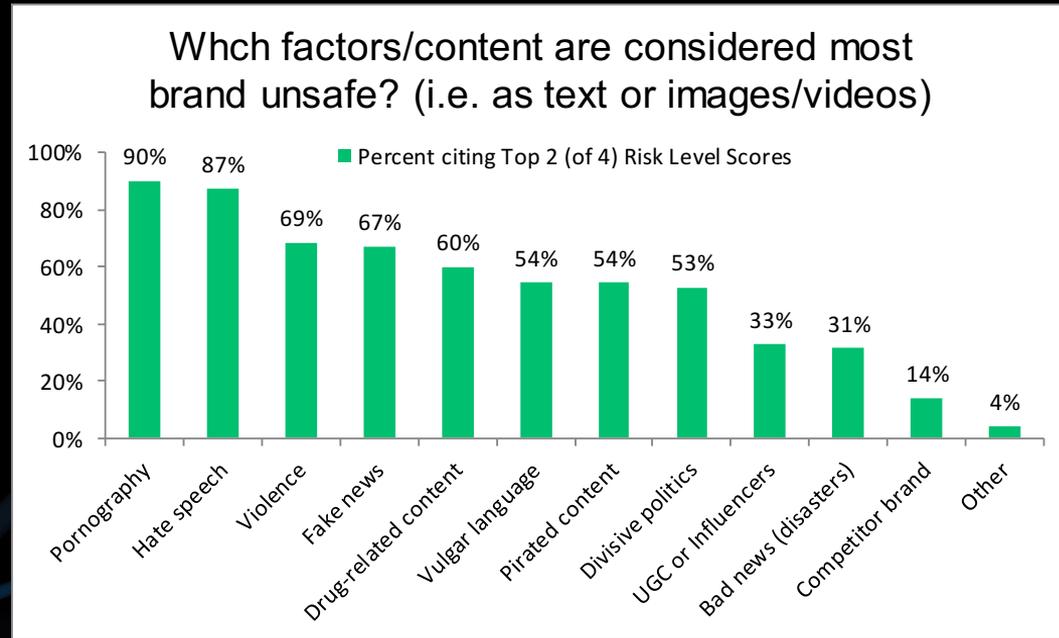
Over three-quarters cite documented brand safety policies at their firms or their clients.



# Pornography is least encountered issue in 2018

Pornography & hate speech cited by nine-out-of-ten as the 'most brand unsafe' content.

**Violence, Fake news and drug-related content are next most cited (60-70%).**



# Thank you for Supporting IAB Canada

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