

IAB Europe poll: Brand Safety Developments in Europe March 2023

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Introduction

IAB Europe's Brand Advertising Committee conducted a survey in January 2023 to ask industry experts for their views on how brand safety has been tackled over the past 12 months and determine what action needs to happen in 2023.

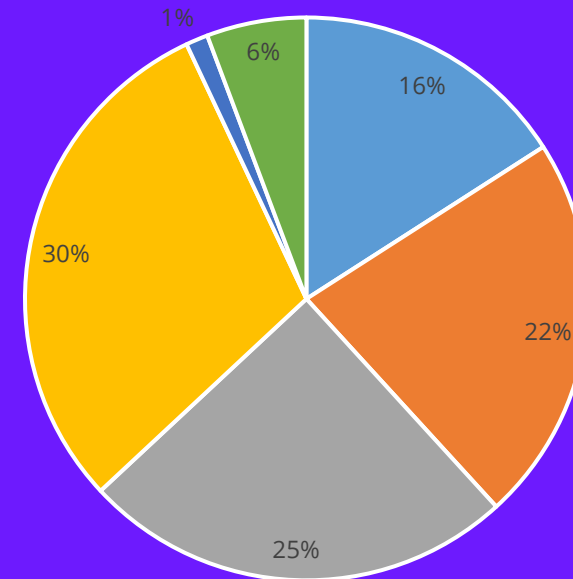
Whilst there are lots of studies which look at consumer views, the Committee wanted to find out what is actually happening from the advertising industry experts.

The results highlight how seriously the industry is taking brand safety, and show how the ecosystem has changed in the last couple of years to place more emphasise on ensuring brand safe environments.

Methodology

An online survey was used with the help of the National IAB Network to ensure a representative sample was collected across 29 markets. The survey received 157 respondents between January and February 2023.

Over 40% of the respondents were from the buy-side.



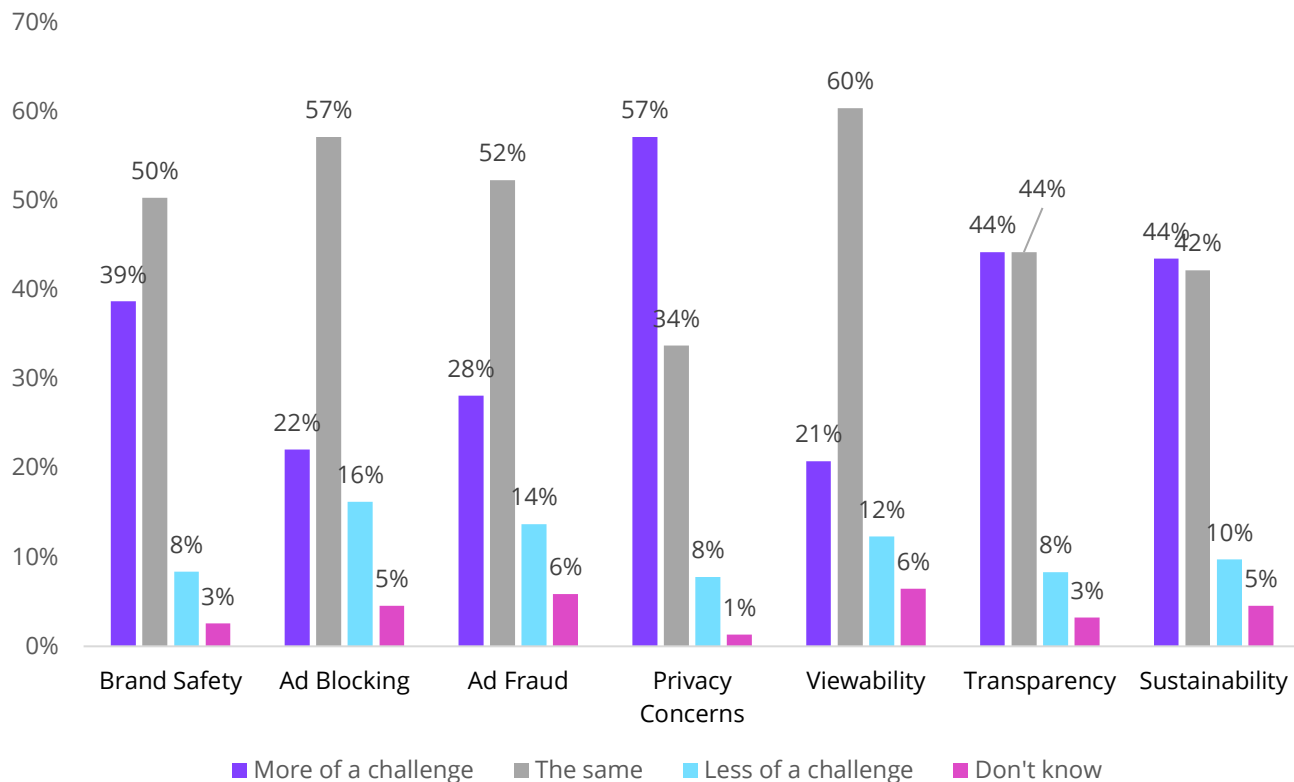
■ An Advertiser ■ A Publisher ■ An Agency
■ An Ad Tech Company ■ Industry Association ■ Other (please specify)

Q. Is your company?

Executive Summary

- Majority of respondents say brand safety is the same in terms of challenges compared to last year. The challenges that have increased are privacy, transparency and sustainability.
- The industry has improved in tackling brand safety - 53% of respondents agreed that the industry has done a good job of tackling brand safety over the past 12 months, this is up from 36% in 2019.
- Ensuring brand safety environments is now a key part of all digital media campaigns - 78% of respondents agree that this is the case
- When outlining how the buy-side protected against brand safety concerns, the results indicate that verification partners are key

Industry challenges – Privacy and Sustainability now more of a challenge than Brand Safety



Privacy concerns top challenge compares to last year

Transparency and sustainability are now more of a challenge than brand safety

- 57% of respondents said that privacy concerns are more of a challenge than last year, only 8% said it was less of a challenge
- 44% of respondents said that transparency and sustainability are more of a challenge than last year compared to 39% that said brand safety
- 50% said brand safety was the same

Q. Are the following industry challenges more or less of a challenge than last year?

With regards to brand safety, please answer why you feel it is: More or less important

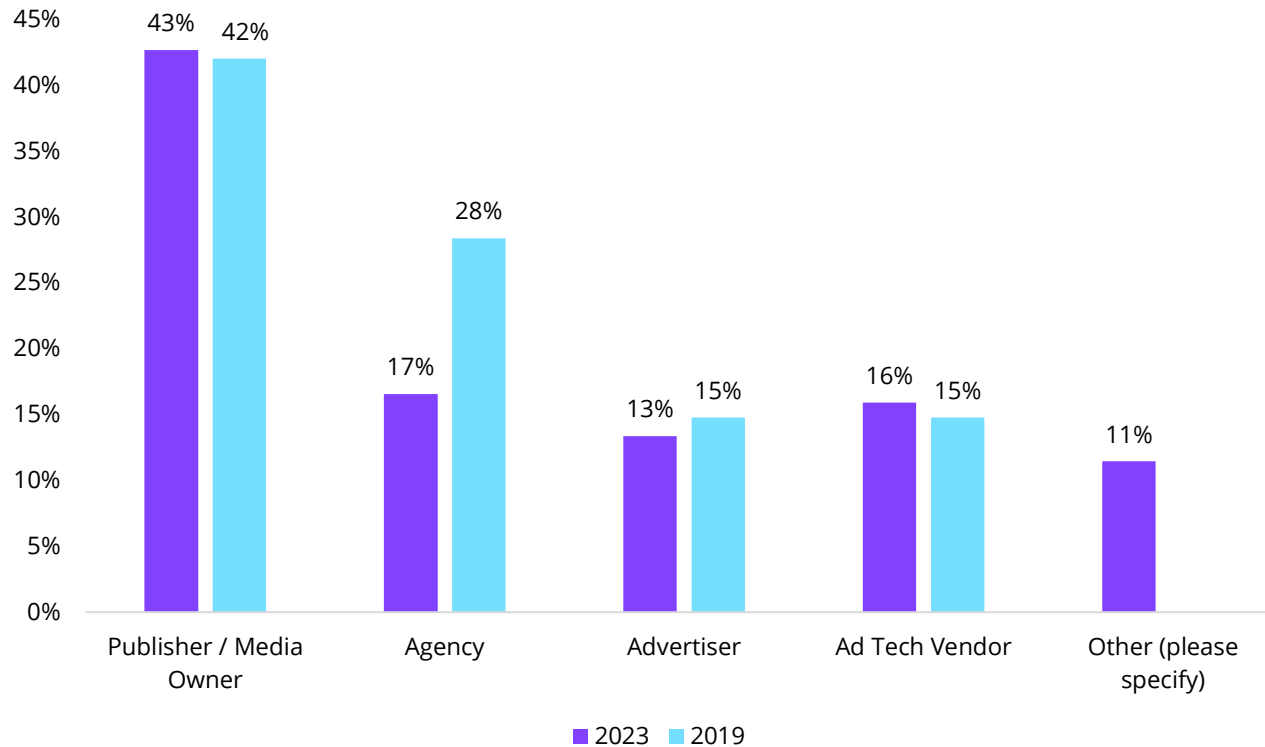
Responses on why it is more of a challenge focused on:

- The proliferation of fake news, rise of live and real-time generated content
- Client demand
- Brand safe content is subjective - brands are becoming more sensitive to the topics / content that they are associated with
- Brands are concerned with protecting their reputation
- Transparency
- Consumers are more sensitive and aware
- Increasing use of programmatic and social media
- Less stable economic environment
- The war on the Ukraine

Responses on why it is less of a challenge focused on:

- Developed ecosystem to track brand safety
- Sustainability
- More transparency
- Quality control
- Brand safety tools working well
- Third party tools make it easier to protect brands
- More education

Publishers / Media Owners Responsible for Brand Safety

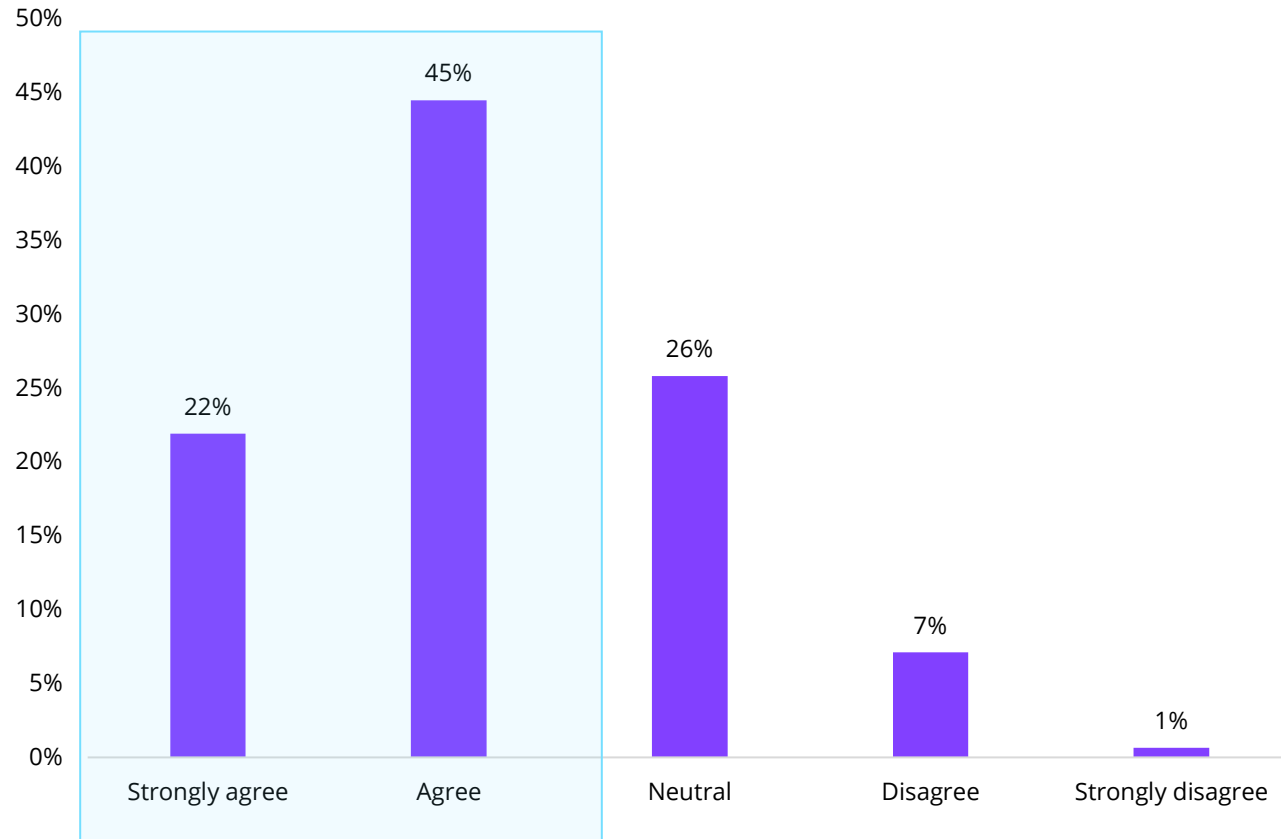


Respondents still think that publishers / media owners are responsible for ensuring brand safety

- The number of respondents that think agencies are responsible for brand safety has decreased from 28% in 2019 to 17% in 2023

Q. Which stakeholder group is most responsible for ensuring brand safety?

Brand safety was a key priority for the industry in 2022

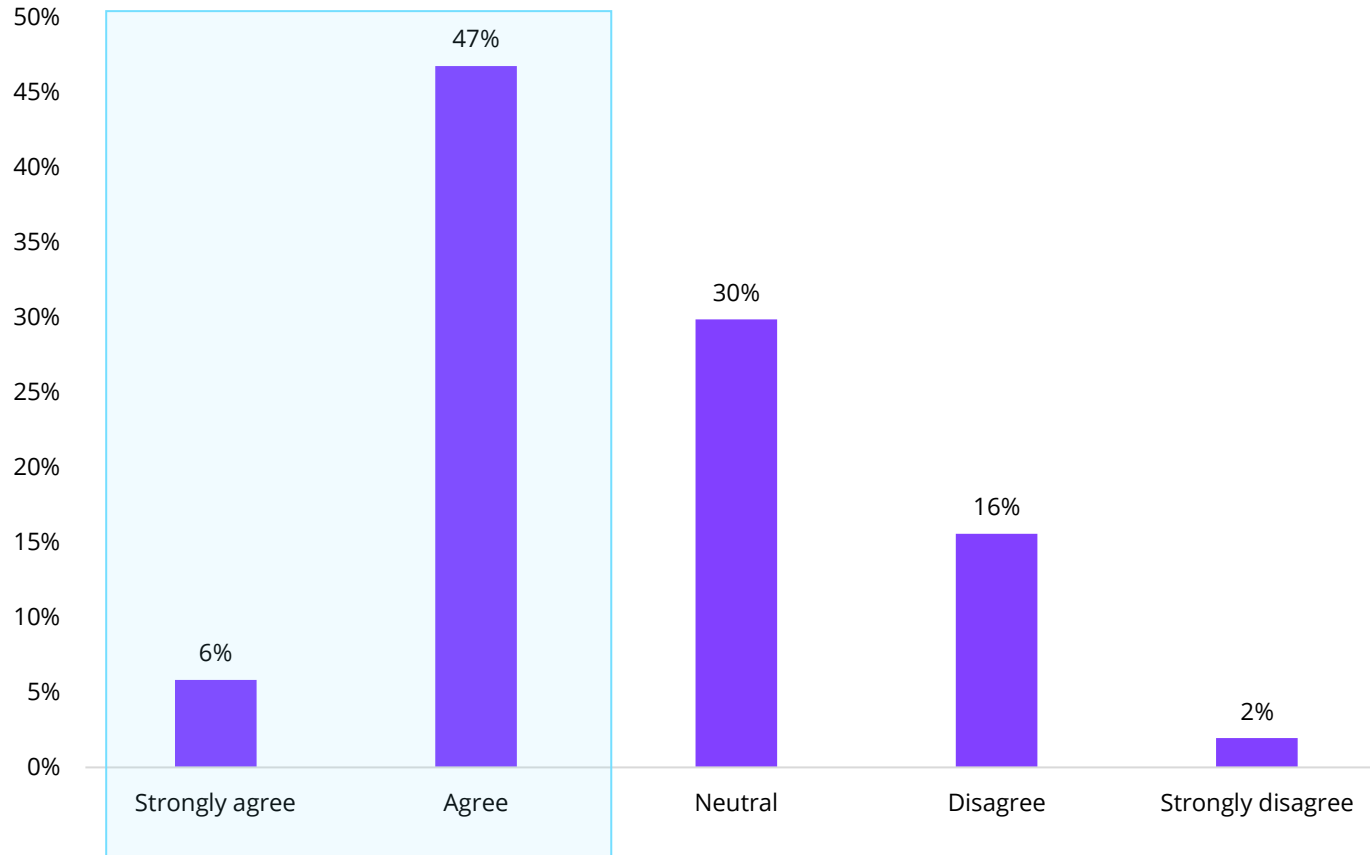


Consensus on brand safety being a priority for the digital advertising industry in 2022

- 67% of respondents agree or strongly agree that brand safety was a key priority for the industry in 2022

Q. Please state the extent to which you agree or disagree with the following statements about brand safety
Brand safety was a key priority for the industry in 2022

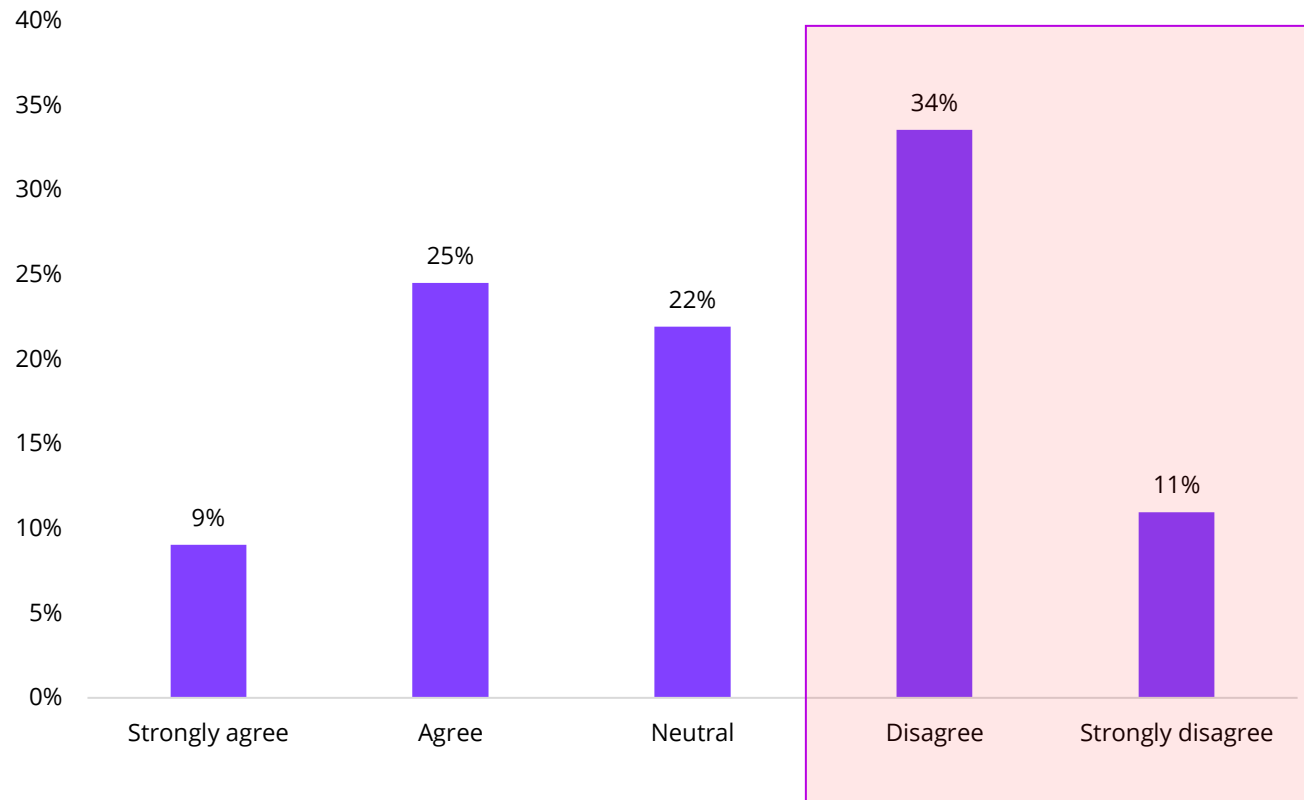
The industry has improved in tackling brand safety



- 53% of respondents agreed that the industry has done a good job of tackling brand safety over the past 12 months, this is up from 36% in 2019.
- Only 18% disagree

Q. Please state the extent to which you agree or disagree with the following statements about brand safety
The industry has done a good job of tackling brand safety over the past 12 months

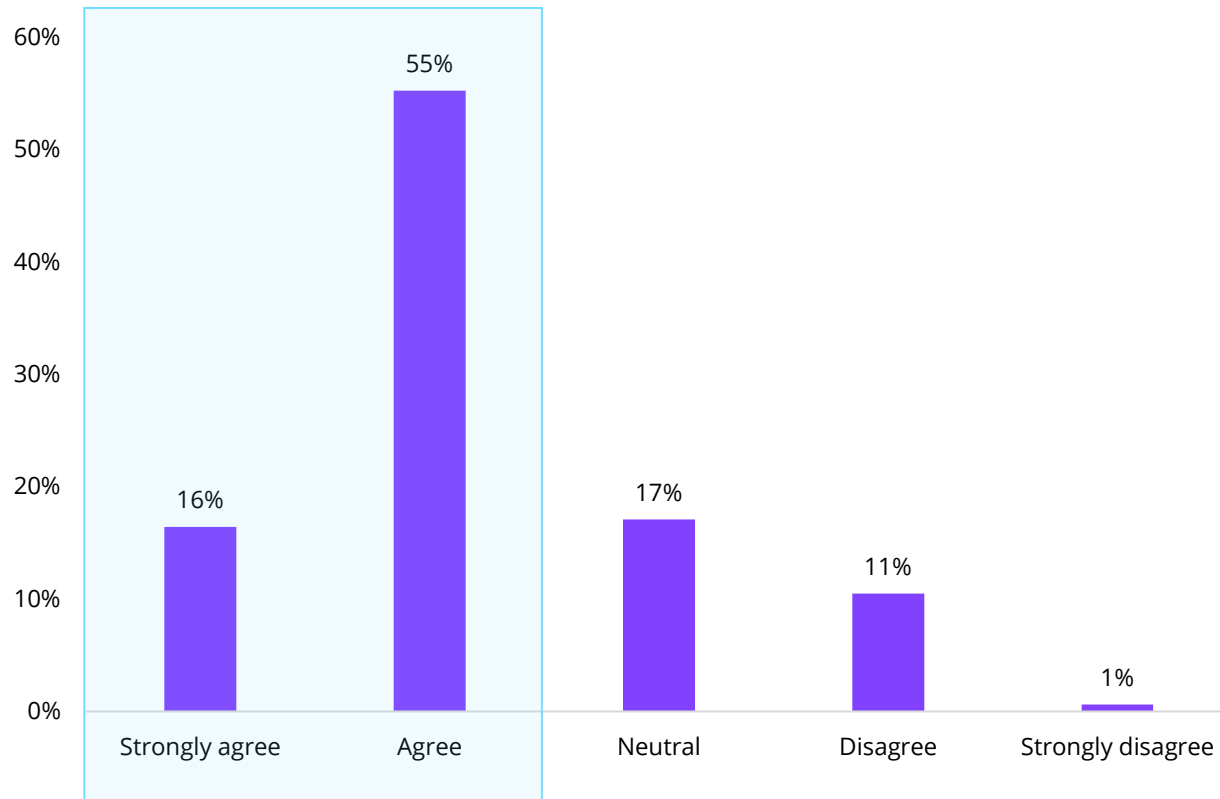
Brand safety will continue to be a challenge this year



- 45% disagree that brand safety will be less of a challenge in 2023, 22% are not sure / neutral.
- In 2019 66% disagreed with the fact that brand safety would be less of a challenge.

Q. Please state the extent to which you agree or disagree with the following statements about brand safety
Brand safety will be less of a challenge in 2023

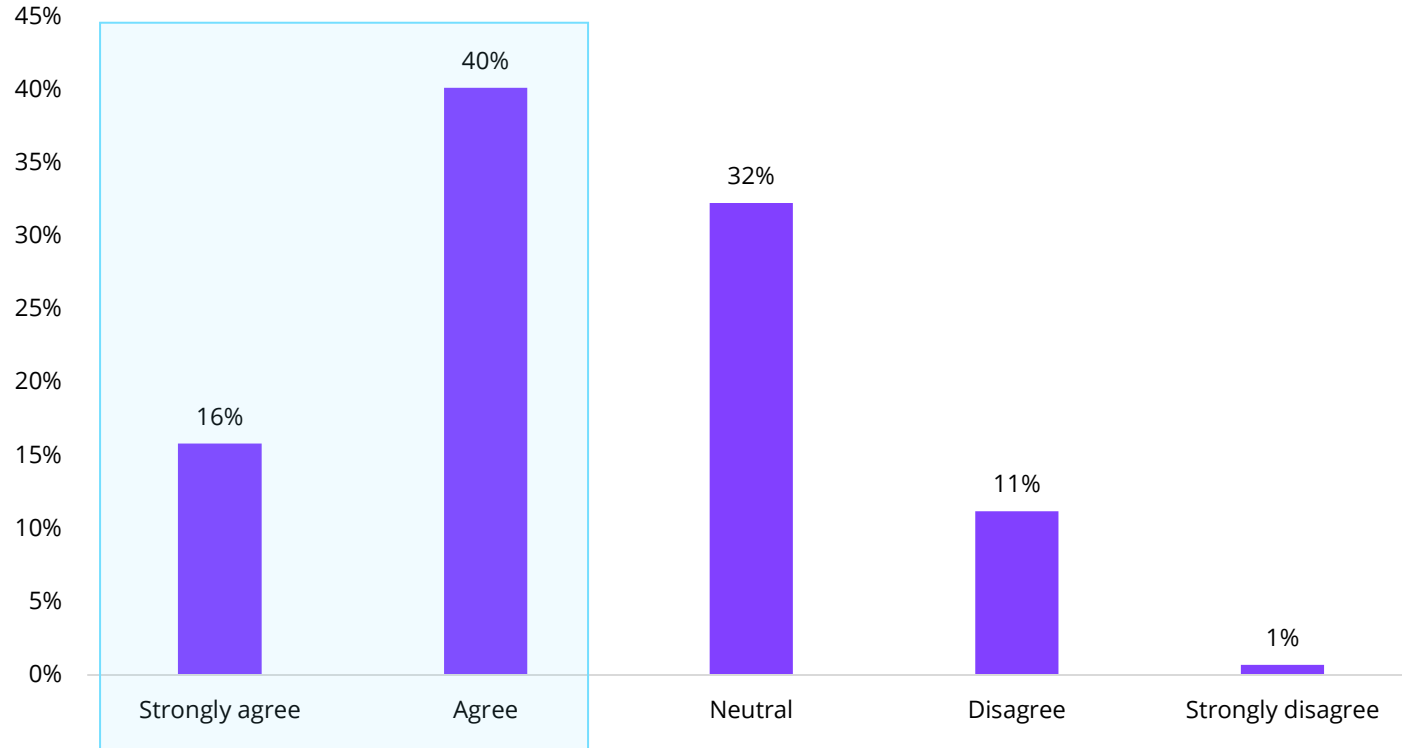
Technology is key to solving brand safety



- 71% agree that technology innovations are helping to solve brand safety concerns. This is up from 65% in 2019.

Q. Please state the extent to which you agree or disagree with the following statements about brand safety
Tech innovations are helping to solve brand safety concerns

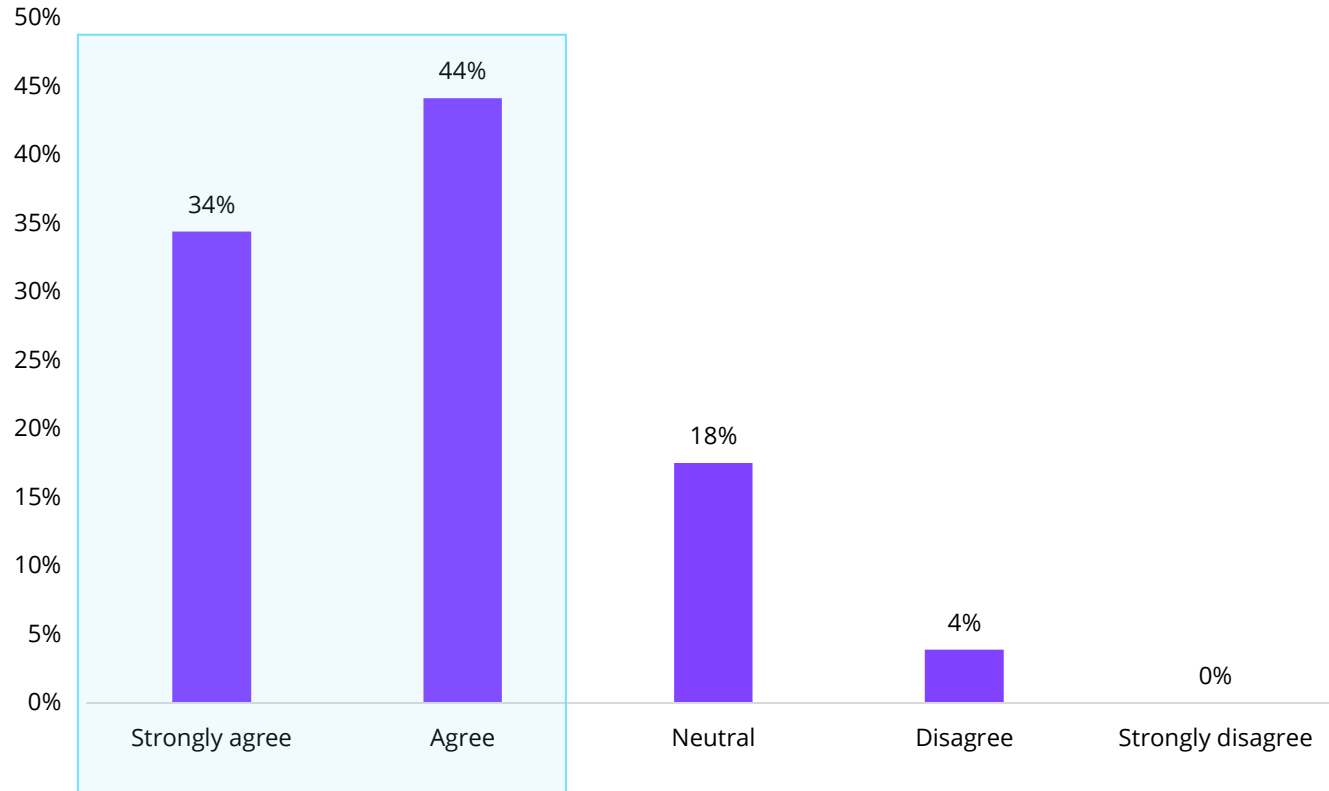
Advertisers are more concerned with brand safety than last year



- 56% agree that advertisers are more concerned with brand safety than last year, this is on par with 57% in 2019

Q. Please state the extent to which you agree or disagree with the following statements about brand safety
Advertisers are more concerned with brand safety than last year

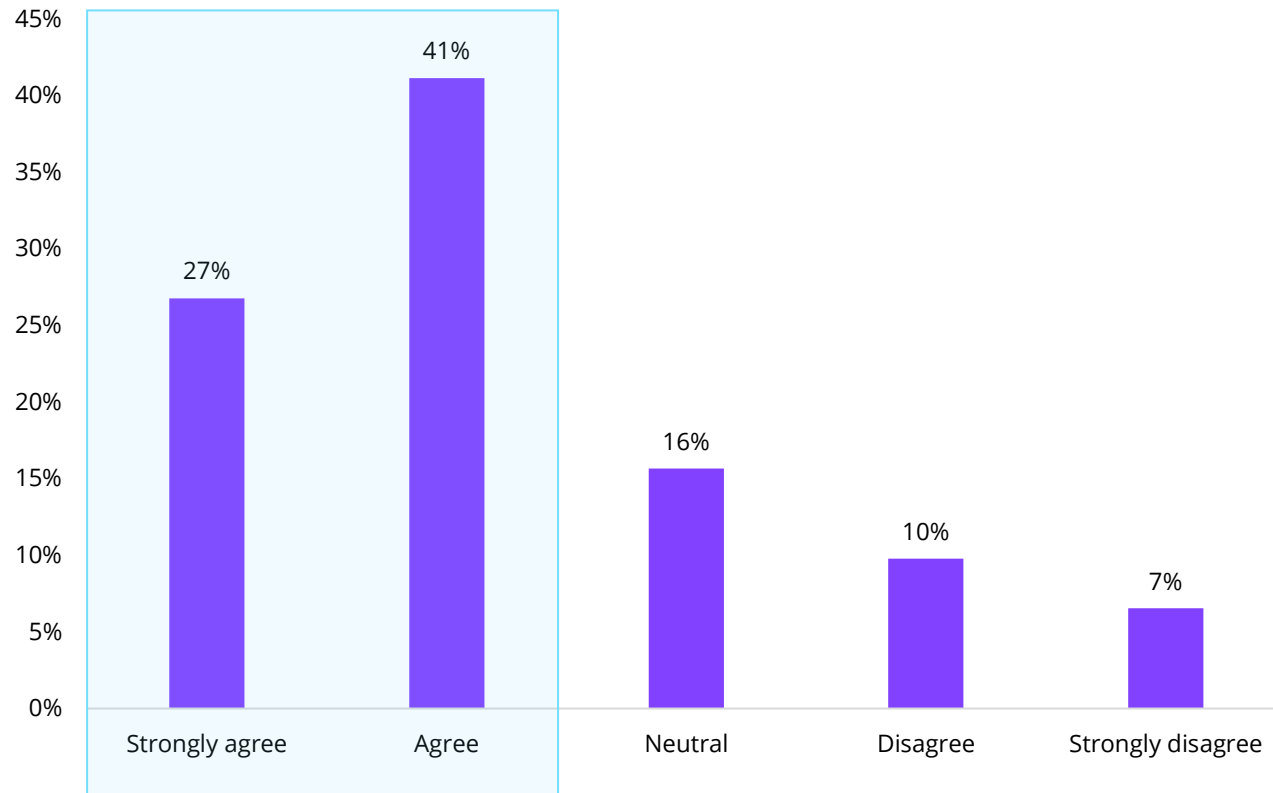
Ensuring brand safety environments is a key part of all digital media campaigns



- 78% agree that ensuring brand safe environments is a key part of all digital media campaigns; similar to 81% in 2019

Q. Please state the extent to which you agree or disagree with the following statements about brand safety
Ensuring brand safe environments is a key part of all digital media campaigns

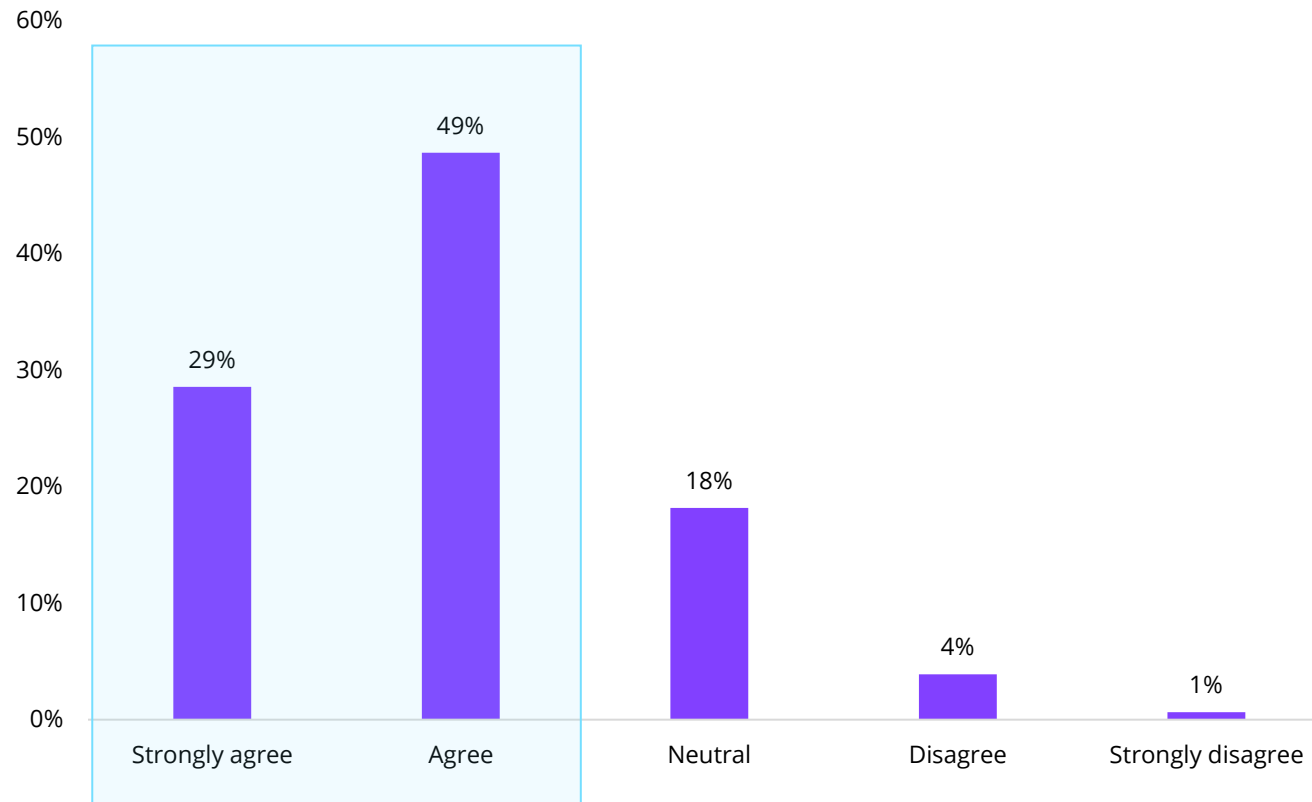
Contextual targeting equally as important as brand safety



- Brand safety is one part of the puzzle; 68% agree or strongly agree that contextual targeting and brand safety are equally important.

Q. Please state the extent to which you agree or disagree with the following statements about brand safety
Contextual targeting and brand safety are equally important

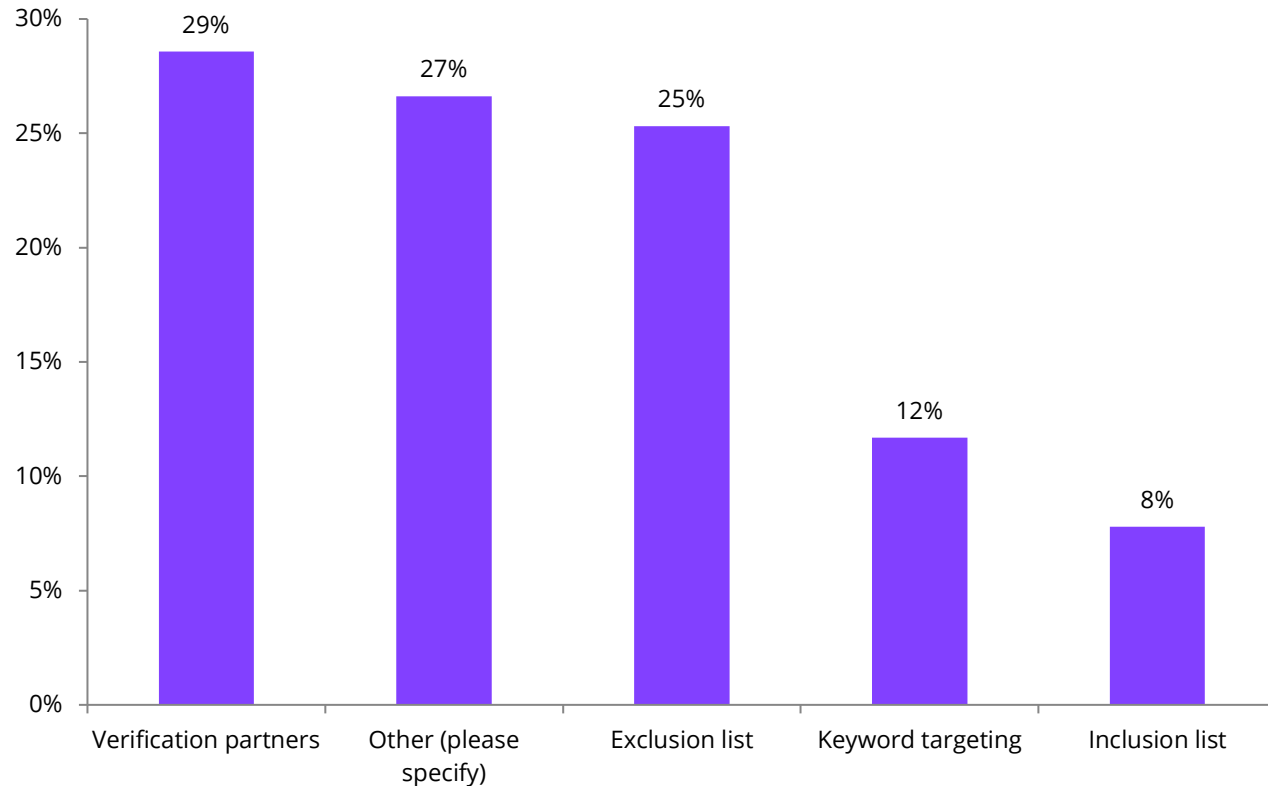
Brand suitability is in increasing in demand



- 78% of respondents agree that there has been greater demand for brand suitability over the past 12 months

*Q. Please state the extent to which you agree or disagree with the following statements about brand safety
There has been greater demand for brand suitability over the past 12 months*

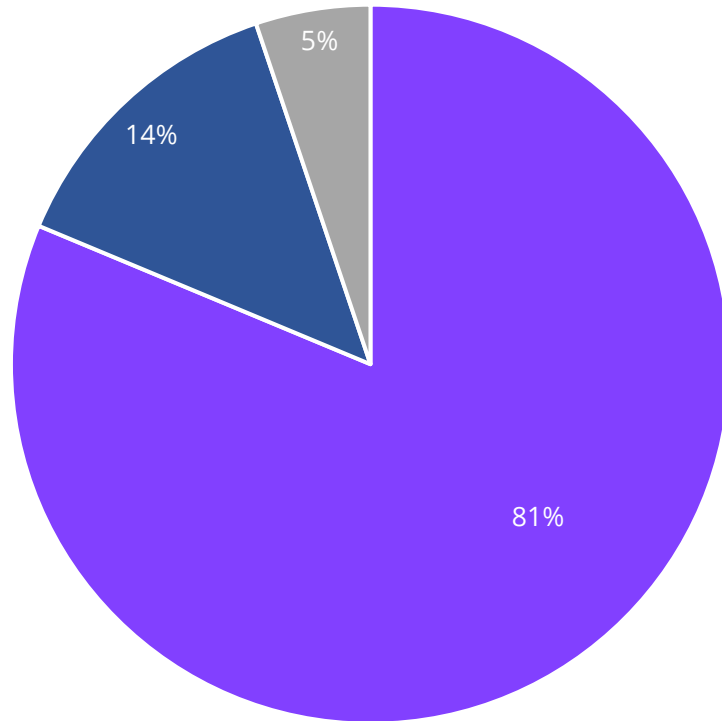
Which of the following tools does your company use to ensure brand safety?



- Nearly a third of respondents use verification partners for ensuring brand safety, a quarter use exclusion lists.
- 27% selected other which included semantic targeting, all of the tools and contextual.

Q. Which of the following tools does your company use to ensure brand safety?

Brand safety requires a bespoke approach to each client's needs

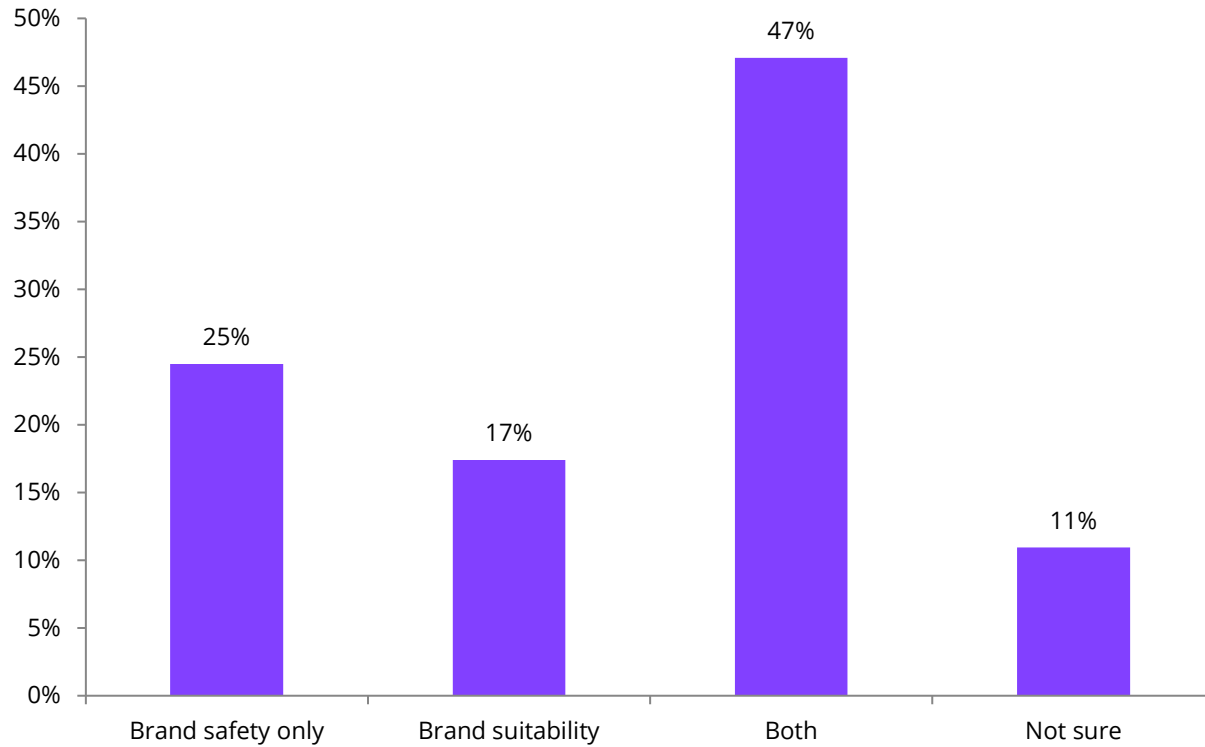


■ Yes ■ No ■ Don't know

- The majority of respondents agree that brand safety requires a bespoke approach to each client's needs.

Do you think brand safety requires a bespoke approach to each client's needs?

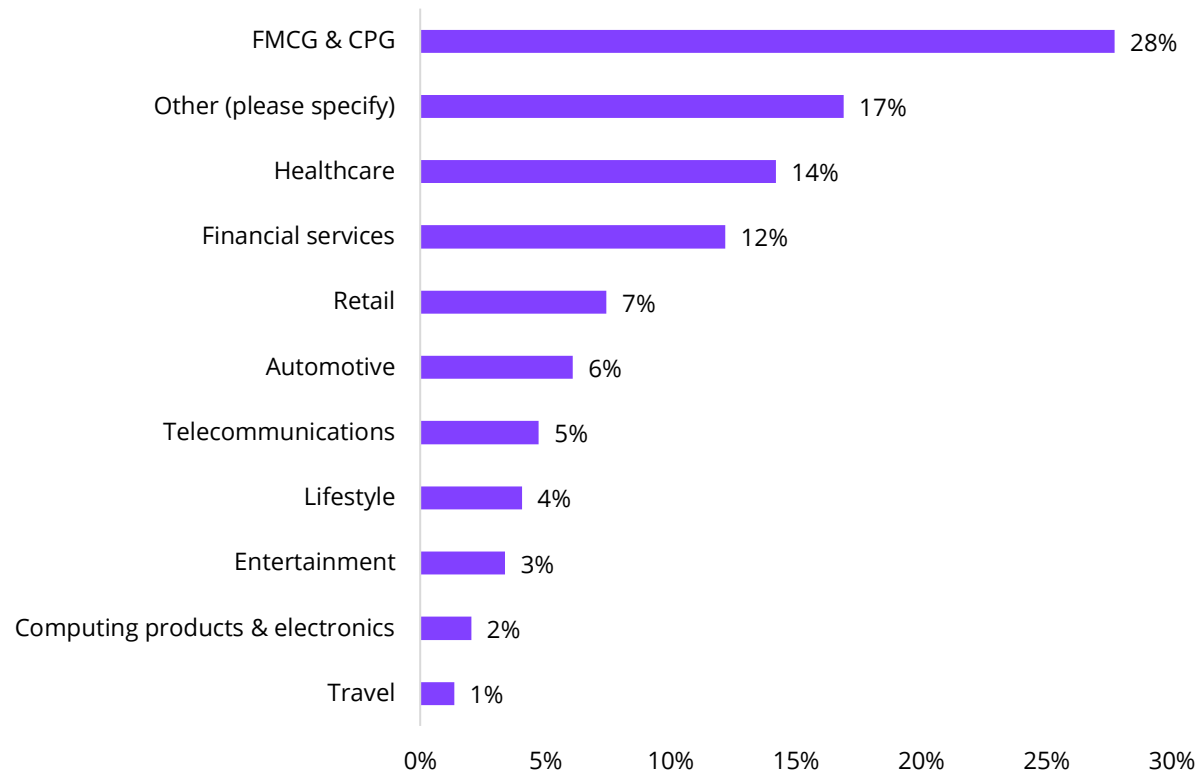
Brand safety is used alongside brand suitability



- Nearly half (47%) of respondents use both brand safety and brand suitability in their campaigns

Q. Do you use brand safety, brand suitability or both?

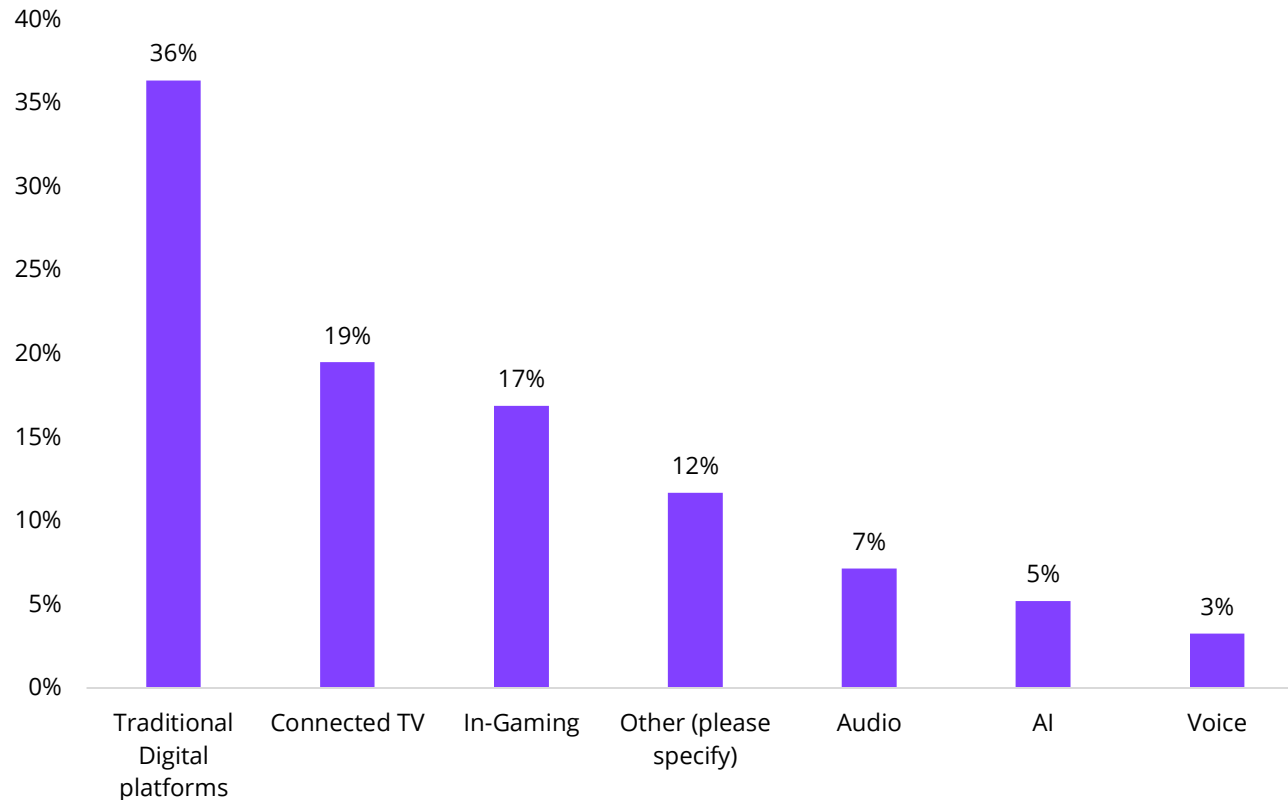
Which industry vertical shows the greatest concern for Brand Safety?



- FMCG was cited as the industry vertical that shows the greatest concern for Brand Safety followed by financial services and healthcare.
- 'Other' responses included luxury and alcohol & gambling,

Q. Which industry vertical shows the greatest concern for Brand Safety?

Traditional digital platforms need more support to tackle brand safety



- Traditional digital platforms was clearly the outlier when it comes to the channel that needs more support to tackle brand safety.
- Connected Tv and In-Gaming were close together at 19% and 17% respectively.

Q. Which of the following channels do you feel needs more support to tackle Brand Safety?

Finally, what needs to happen in 2023 to further tackle brand safety?

Responses focused on:

- Rules for news creators
- Safeguarding customer privacy
- More technical support
- More verification
- Content control

Q. Finally, what needs to happen in 2023 to further tackle brand safety? (open ended question)



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