



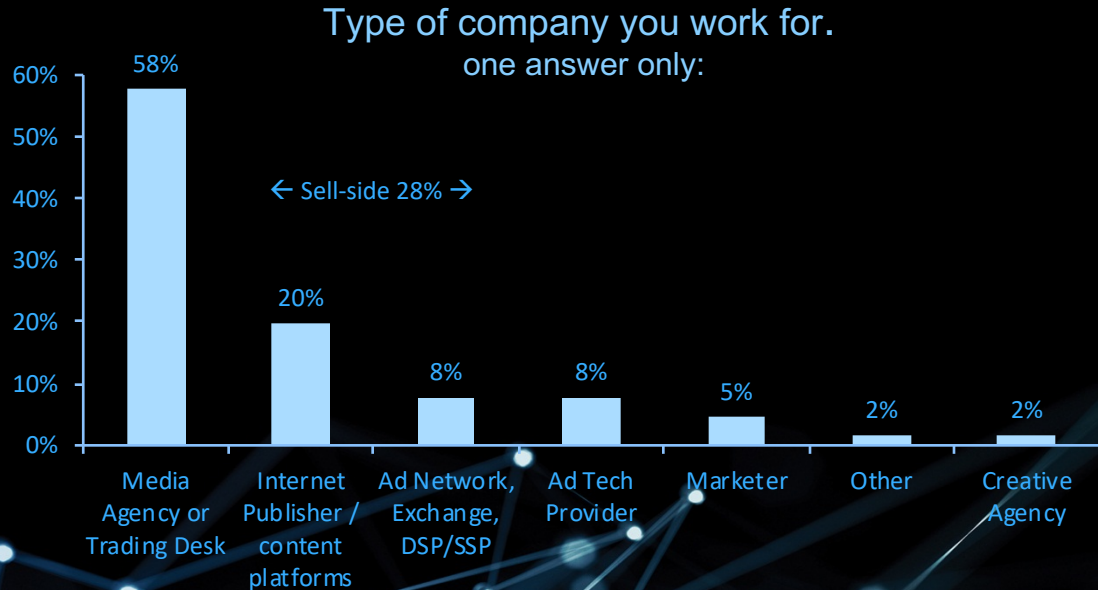
IAB Canada

The State of Brand Safety in Canada-2019

Year Two – Barometer Report

Who Responded

Over 60% Buy-Side...Sell-side almost 30%.



Top Level Findings

- The Issue of Brand Safety remains top of mind
- Preventative measures are working – when they're deployed
- Brand Safety plays in the court of public opinion – the risk is a direct one
- While progress is being made – this is an always on, persistently refined, forever implementation

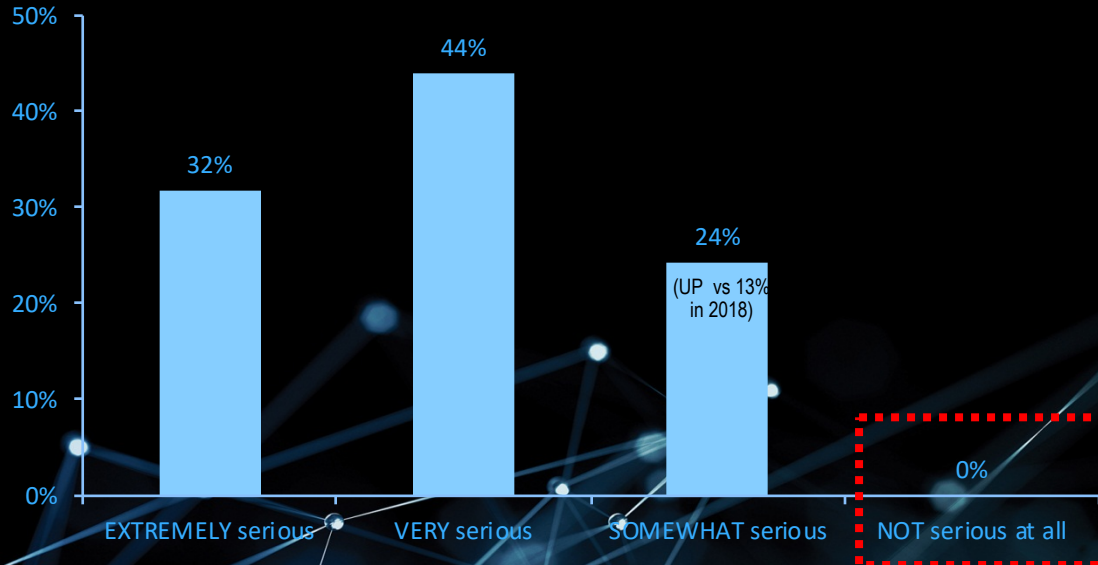
The Brand Safety Issue

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Brand Safety is a Serious Issue

Everyone assigns Brand Safety some degree of seriousness; three-in-four respondents consider it Very or Extremely serious.

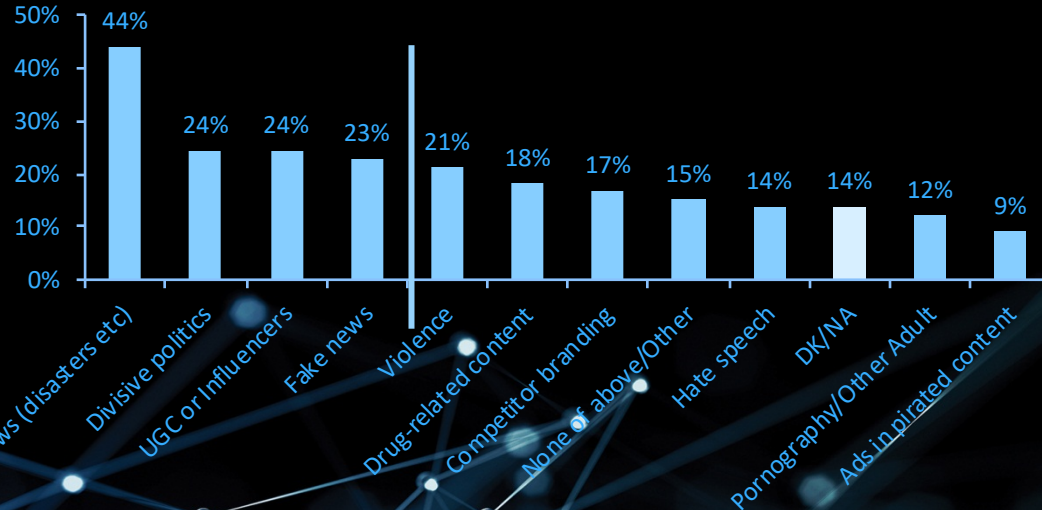
How serious is digital brand safety for your company or your clients? one answer only.



Again in 2019 – Avoid “Bad News”!

“Bad News” seen as most common unsuitable content. Next-3 were in last year’s top-four as well, but *less common now*.

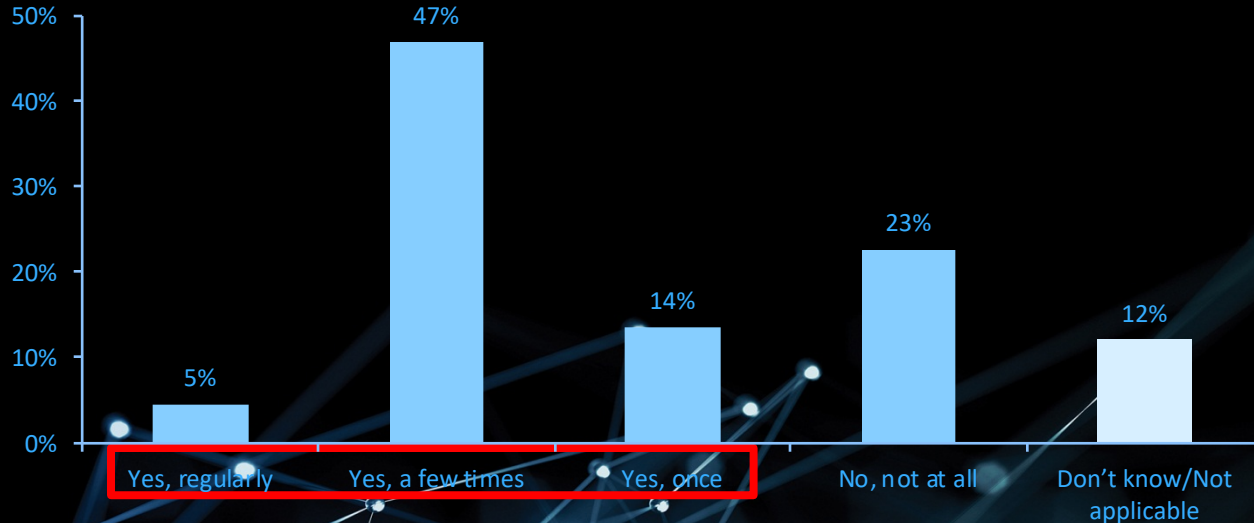
Types of brand-unsafe CONTENT encountered adjacent to digital ads, past 6 months - all that apply.



Continues to be a 'Living' Problem

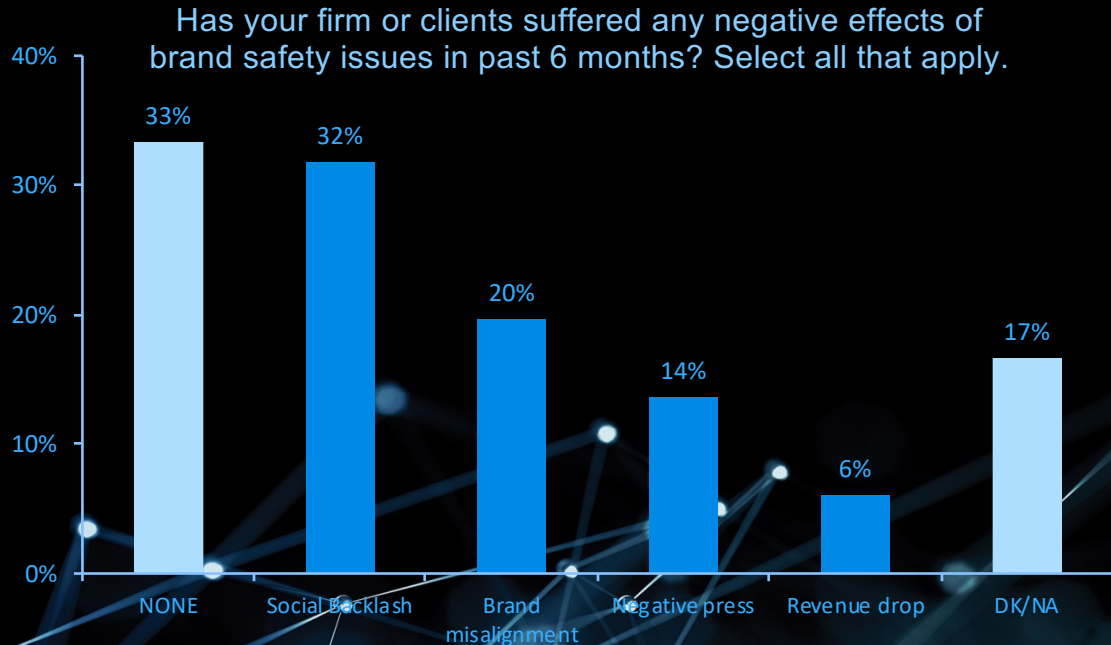
Two-thirds experienced at least one brand safety issue recently, similar to last year – over half did so more often.

How often has your firm or clients experienced brand safety issues in past 6 months? - one answer only



Negative Fallout Experiences are Common

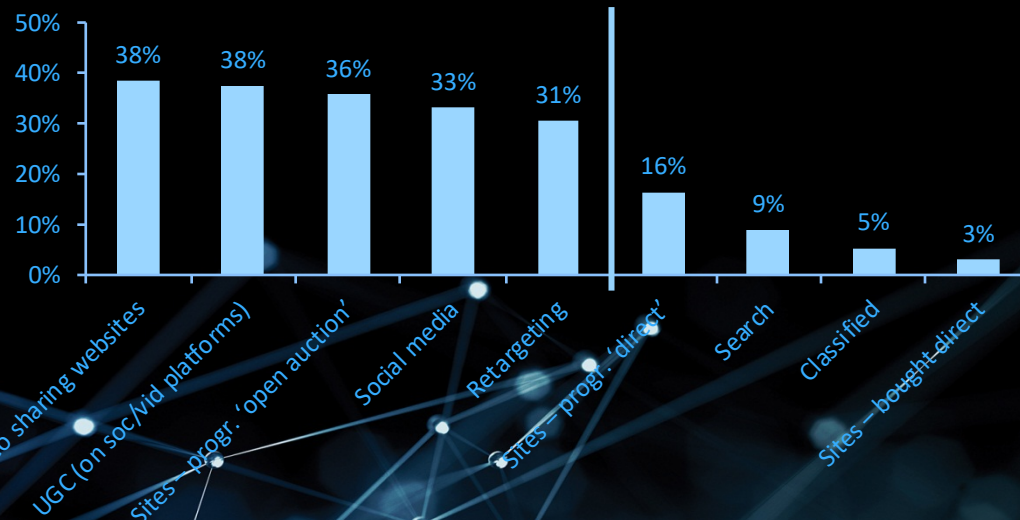
Social backlash cited most as a fallout from brand safety issues, followed by brand misalignment.



Video, Social Media and Scale Tactics Increase Risk

Riskiest platforms/tactics led by social content sharing (video) and open-auction buys. Similar order to last year, BUT *incidence scores noticeably down*.

RISKIEST Platforms, Formats or Tactics in terms of brand safety for your firm or clients (top 2 scores)

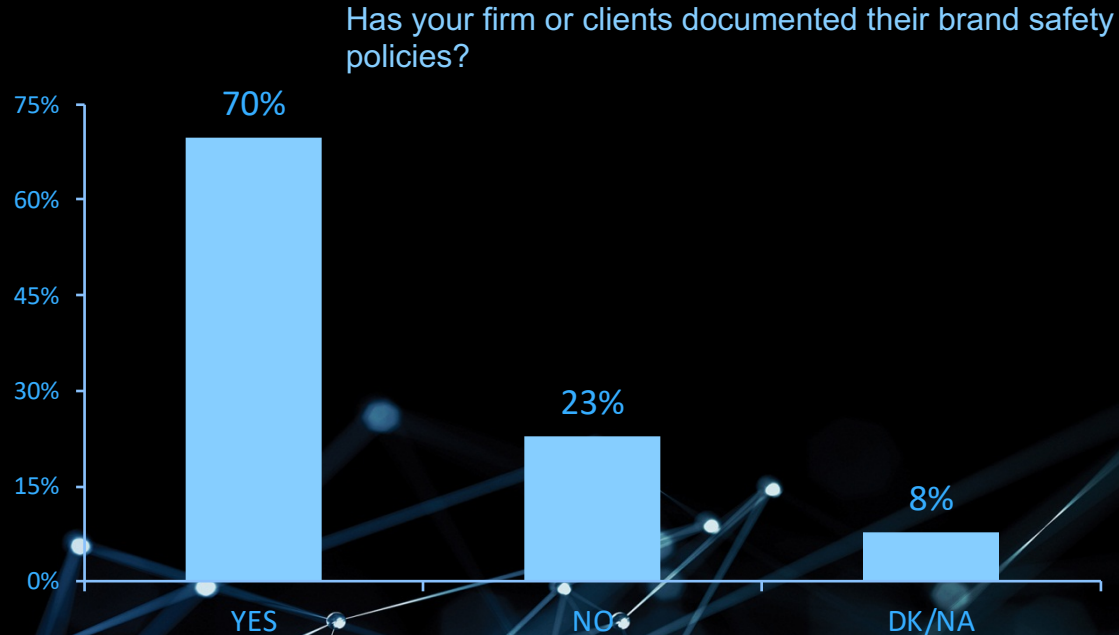


Preventative Measures

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Most Buyers have Policies

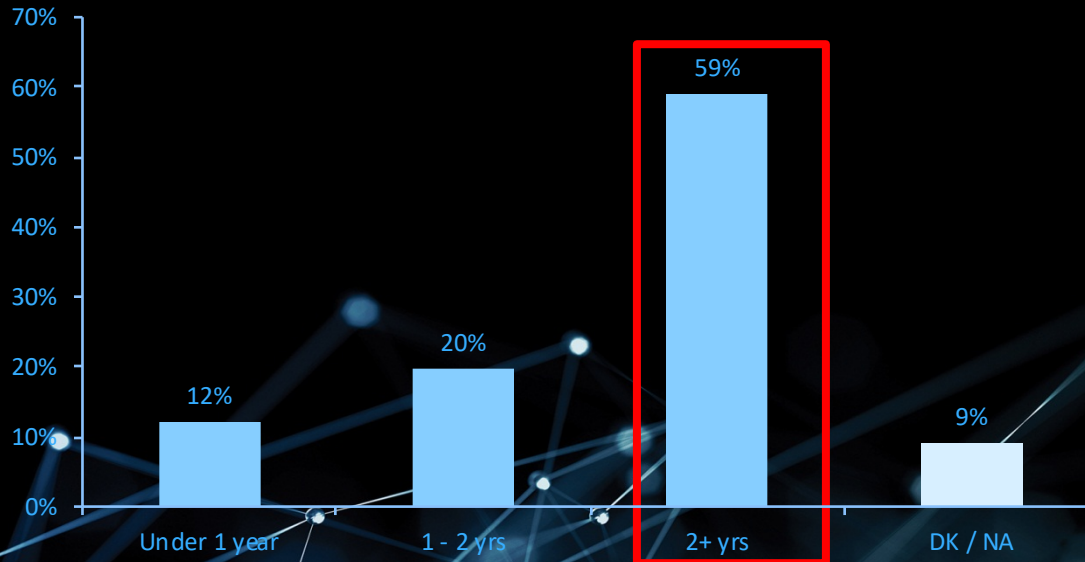
Seven-in-ten respondents cite documented brand safety policies at their firms or clients – similar to last year.



Technology is Widely Used

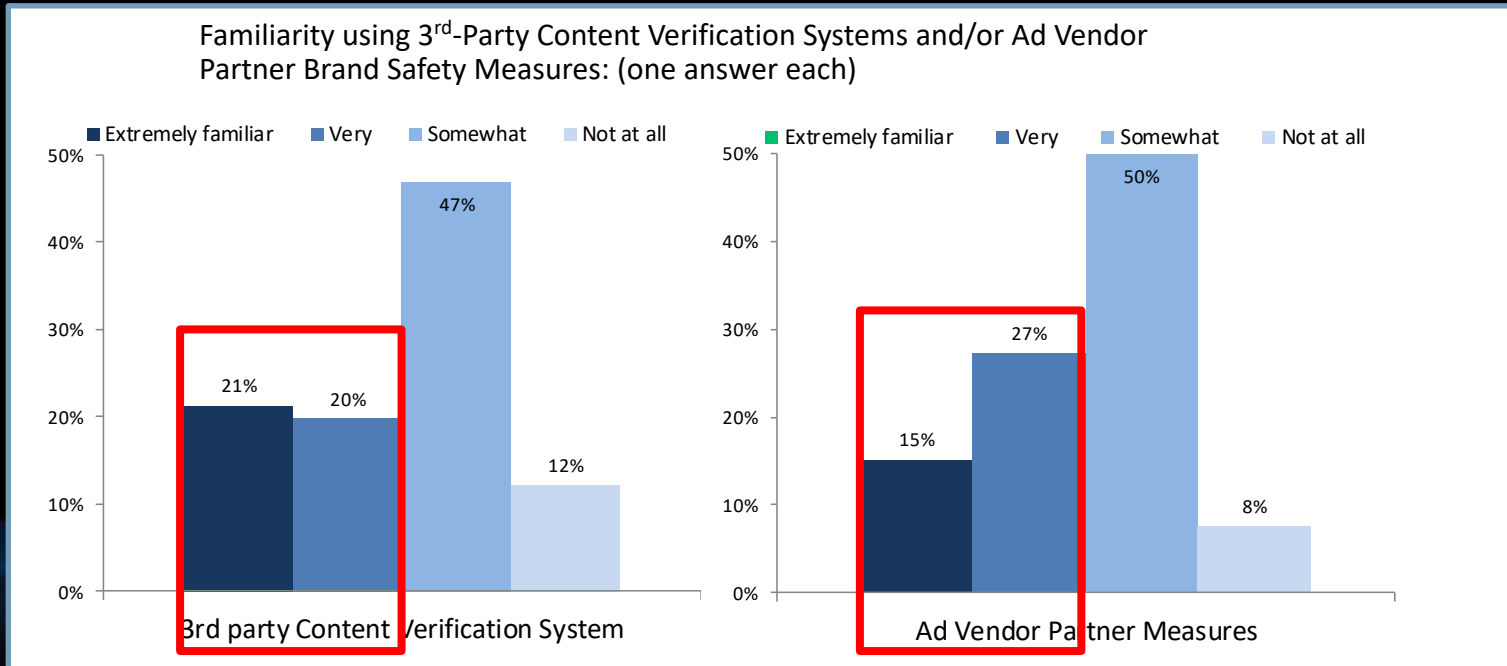
Over 90% are using technologies/solutions to avoid brand safety risks – almost 60% for over two years (70% of buy-side sample).

How long have your firm or clients' been using technologies/solutions to avoid brand safety issues? one answer only:



Concentrated Familiarity of Brand Safety Solutions – there's work to be done...

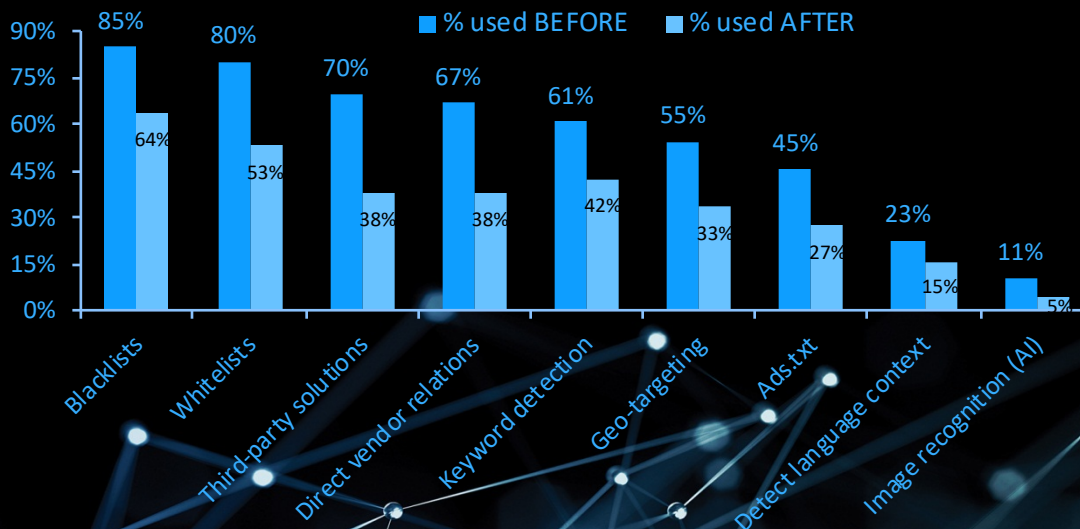
Conversely, about five-in-ten cite less familiarity using the tools.



Preventive Measures Outweigh 'Rear View' Approaches

Solutions to combat brand safety risks BEFORE they happen - are more broadly used across the board.

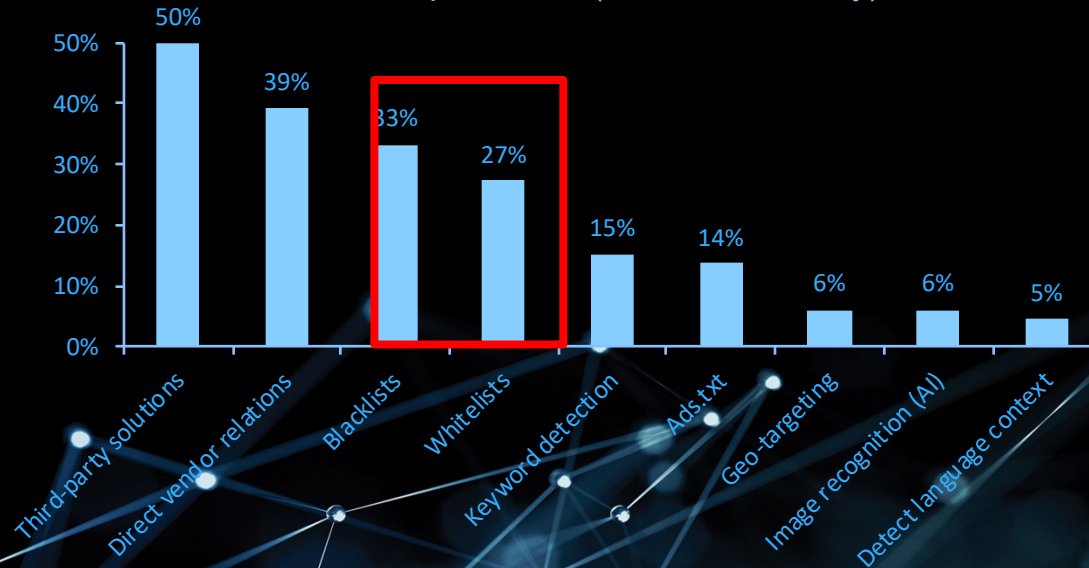
Solutions/Technologies used BEFORE vs AFTER brand safety issues occur - past 6 months (all that apply)



Black & White Lists – Most Effective *Individual* Solutions

'3rd-party solutions' & 'Direct Vendor dealings' lead the pack as 'collective' measures (moderately higher buy-side skew to 3rd-party).

Top-2 most effective brand safety solutions in your firms' or clients' experience? (two answers only)



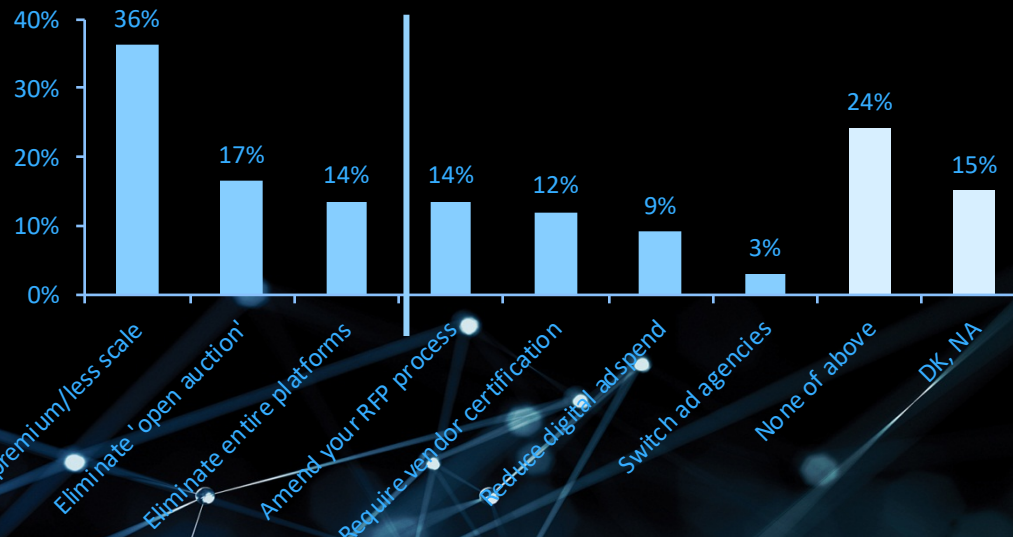
The Impact of Brand Safety

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'Quality over Quantity' Response to Brand Risk

'More premium sites/less scale' describes the top-3 activation changes made to address brand safety concerns.

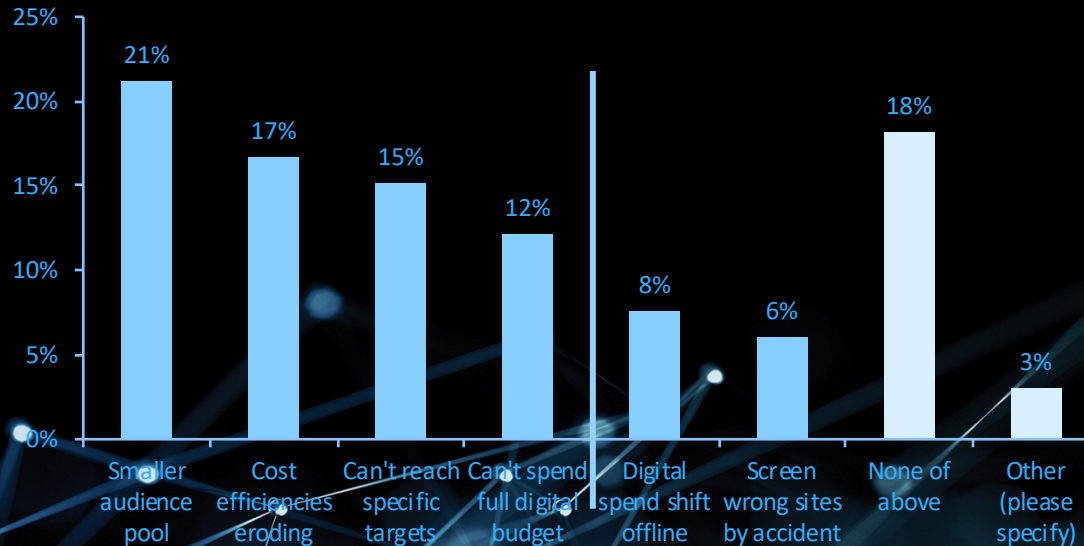
How have brand safety precautions changed your firms' or clients' digital buy/activation practices - past 6 months?



Safety is Putting Pressure on Scale

Top-4 concerns are similar to last year and now include cost efficiencies (newly added variable).

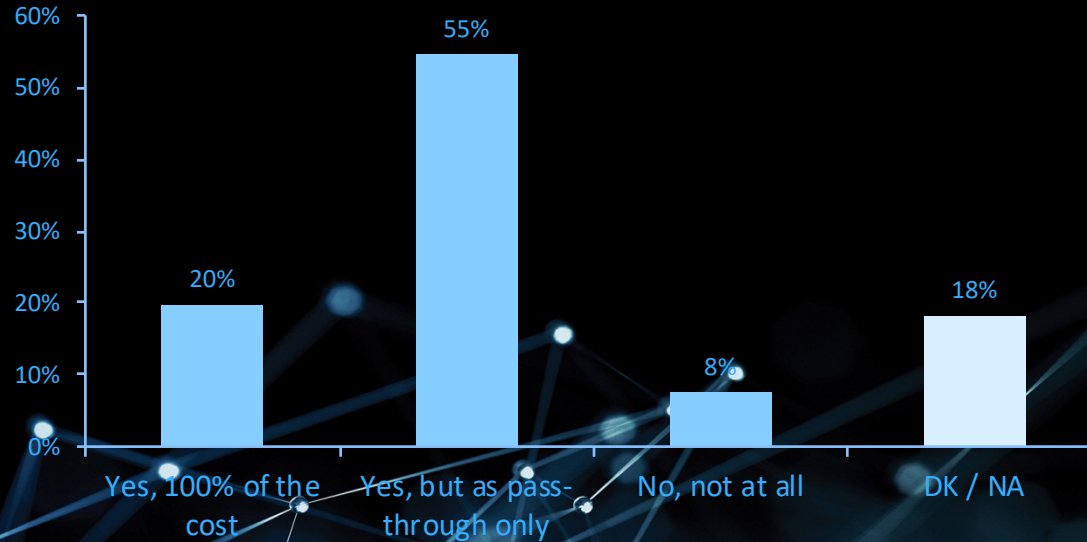
Potential consequences - that concern your firm or clients the most - from using brand safety measures



Clients Take on Cost of Brand Safety

Most understand the cost associated with verification – over half will absorb as pass-through only (primarily agencies).

Is your firm prepared to absorb the incremental cost of content verification process/tools, to ensure brand safety?



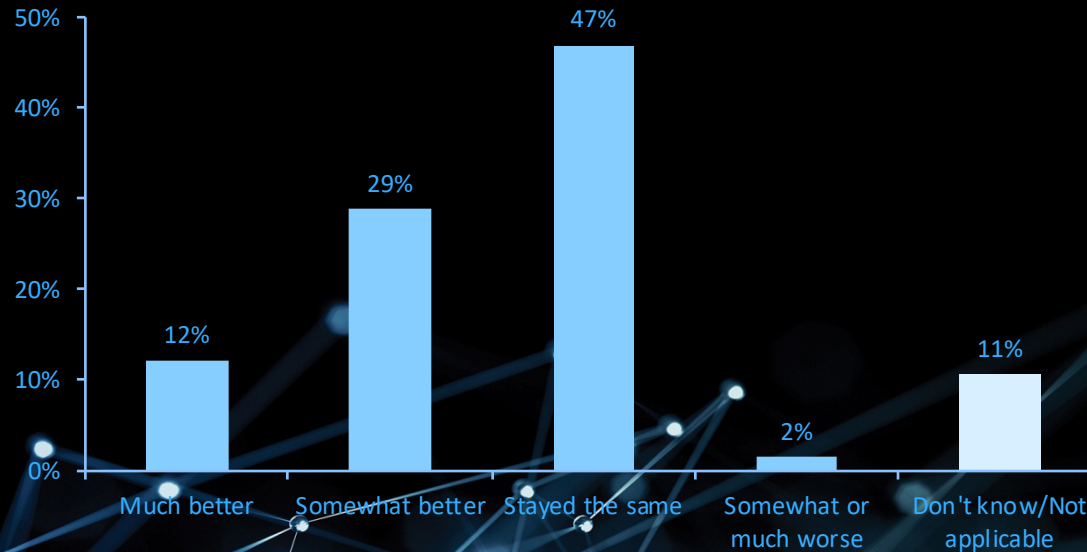
Prognosis

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Brand Safety Appears Stable, Some Optimism Cited

It's not getting worse...

Has this problem gotten better or worse in the past 6 months?
one answer only.



Conclusion

- Brand Safety remains top of mind for brands
- News, politics and fake content are the biggest areas of concern
- Policies are being codified
- Technology is being used but there's still room for improvement
- Scale is impacted while filtration is sorted through
- Discussion around value in online media surfaces to the top – again

Thank you for Supporting IAB Canada

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