

Five Charts Explaining the State of Brand Safety

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YouTube is in the middle of another brand safety conundrum, but this time around the platform is making news for being proactive.

On July 26, YouTube **removed four videos from Infowars**—a digital publisher and dietary supplement empire run by Alex Jones that promotes outrageous conspiracy theories—and banned it from live streaming on its platform for 90 days. YouTube issued a statement that said Infowars violated its hate speech policies.

It was just a little over a year ago that several **brands took their ads off YouTube** in response to a report that The Times of London published about brand ads appearing in YouTube videos that promoted terrorism. Many of these advertisers **came back to YouTube**, but the ad industry hasn't stopped talking about brand safety. The topic is so popular that a new trade group, Brand Safety Institute, launched July 25.

Here's a quick look at the state of brand safety.

In June, **Iponweb and ExchangeWire** surveyed 129 media agency professionals worldwide and found that about six in 10 of those who built their own ad tech view brand safety as a major challenge of programmatic.

Major Challenges of Programmatic Buying According to Media Agencies Worldwide, by Programmatic Buying Technology Ownership, June 2018

% of respondents

	Programmatic buying tech owners	Non- owners
Lack of transparency around media buys	78%	45%
Brand safety	59%	35%
Technological capabilities of third-party technology	54%	27%
Access to quality data	52%	55%
Lack of education/understanding	52%	49%
Programmatic ad fraud	48%	39%
Aligning existing KPIs with desired business outcomes	48%	35%
Measuring the incremental impact of media buys	46%	49%
Cost of third-party technology	46%	35%
Scale—lack of high quality inventory	39%	45%

Source: ExchangeWire, "Agents of Change: The Rise of the Programmatic Media Agency" in association with Iponweb, July 12, 2018

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Just over half of the 332 UK digital advertising professionals surveyed by **Integral Ad Science** in March said that brand safety will be a greater concern for them in 2018 than it was in previous years. The only issue that caused marketers more anxiety was the General Data Protection Regulation (GDPR), cited by nearly two-thirds of respondents.

Industry Challenges that Will Become a Greater Concern in 2018 According to UK Publishers vs. Total Marketers*

% of respondents

	Publishers	Total marketers*
GDPR	56.9%	64.3%
Brand safety	43.1%	54.6%
Transparency	43.1%	46.5%
Ad fraud	39.2%	41.6%
Privacy concerns	47.1%	38.5%
Lack of in-app measurement	27.5%	32.9%
Ad blocking	49.0%	32.2%
Fake news	35.3%	31.1%
Attribution modelling	19.6%	29.7%
ROI assessment	31.4%	27.6%
Accurate targeting	21.6%	22.0%
Third-party measurement	19.6%	21.7%
Other	2.0%	0.7%

Note: publishers n=51; total n=286; *respondents at agencies, brands, demand-side platforms (DSPs), networks or exchanges, publishers, supply-side platforms (SSPs), trading desks and other
Source: Integral Ad Science, "Look ahead UK: Transparency will shape 2018," March 23, 2018

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Some marketers believe brand safety threatens how they operate. In a March survey of 1,118 marketers worldwide conducted by [Rakuten Marketing](#), 41.1% of US respondents said that brand safety is one of the issues that poses the greatest threat to their marketing.

Issues that Pose the Greatest Threat to Marketing in 2018 According to Marketers in Select Countries
% of respondents

	1 Australia	3 Germany	5 UK	7 Total			
	2 France	4 Singapore	6 US				
	1	2	3	4	5	6	7
Changing consumer expectations	50.5%	50.0%	59.5%	53.4%	46.6%	40.6%	49.8%
Loss of customers	46.0%	46.5%	44.4%	37.9%	47.1%	36.1%	43.5%
Brand safety and protecting reputation	46.0%	35.1%	23.4%	29.1%	36.4%	41.1%	35.7%
Proving the value of marketing	38.5%	26.7%	27.8%	30.1%	43.7%	44.1%	35.6%
Ensuring positive perception of a marketing discipline	29.0%	35.6%	36.6%	28.2%	29.6%	42.1%	34.0%
Ad fraud and viewability	29.5%	30.7%	24.9%	33.0%	24.3%	23.3%	27.1%
Competitors adopting artificial intelligence	27.0%	27.2%	20.0%	43.7%	25.7%	26.2%	26.9%
GDPR & eprivacy	14.5%	26.2%	40.5%	16.5%	28.2%	12.4%	23.7%
Redundancy through automation	18.5%	21.3%	22.0%	28.2%	14.1%	32.7%	22.3%
Other	0.5%	0.5%	1.0%	0.0%	4.4%	1.5%	1.4%

Source: Rakuten Marketing, "What Marketers Want in 2018: Five Strategic Opportunities for 2018" conducted by Morar HPI; eMarketer calculations, March 13, 2018

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There are various actions advertisers can take to protect their ads from appearing next to controversial content. According to a May survey of 300 US agency respondents conducted by [Trusted Media Brands and Advertiser Perceptions](#), the most common tactic is applying a blacklist to media buys.

Steps Taken to Improve Brand Safety of Digital Media Buys According to US Marketers*, May 2018

% of respondents

	Already taken	Plan to take
Blacklist specific sites/channels	66%	24%
Avoid/limit political content/sites	58%	27%
Monitor/audit site lists	56%	25%
Whitelist specific sites/channels	55%	26%
Avoid/limit user generated content/sites	48%	30%
Increase use of contextual targeting	47%	29%
Demand more accountability from social platforms	46%	34%
Increase use of programmatic guaranteed/private marketplaces	44%	34%

Note: among respondents involved in digital/mobile advertising; *from agencies and marketing firms

Source: Trusted Media Brands (TMB), "Programmatic in the Era of Transparency" conducted by Advertiser Perceptions, July 11, 2018

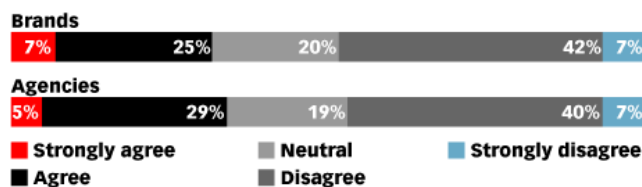
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But despite how much attention brand safety gets at industry events and from advertising lobbyists, many advertisers do not put many resources toward controlling where their ads run. In an October 2017 **Warc** survey of more than 600 marketing and advertising professionals worldwide, nearly half of the respondents disagreed with the notion that brands would reduce their digital ad spend if brand safety, viewability and fraud aren't resolved. Only about a third agreed that digital ad spend will decline if these problems persist.

Brands vs. Agencies Worldwide that Agree that Brands Will Reduce Digital Spend Unless Issues of Brand Safety, Viewability and Fraud Are Resolved, Oct 2017

% of respondents in each group



Note: numbers may not add up to 100% due to rounding
Source: Warc, "Toolkit 2018," Dec 7, 2017

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