

THE DIGITAL LANDSCAPE

A Look At Ad Viewability, Fraud and Bots



AD VIEWABILITY

IT SHOULDN'T TAKE **A SCENE TO BE SEEN**



46%
OF DISPLAY ADS ARE
OUT OF VIEW



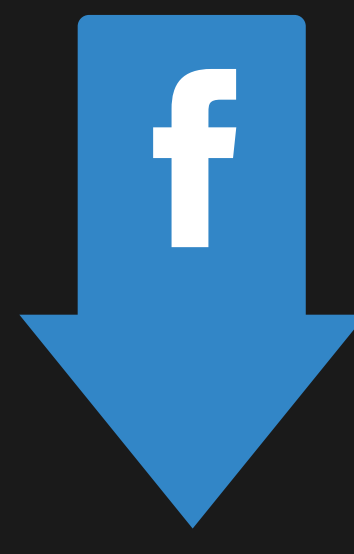
42%
OF VIDEO ADS ARE
OUT OF VIEW

Source: Integral Ad Science Media Quality 1Q17 report/
Desktop viewability per MRC standard/U.S.

LACK OF STANDARDIZATION IN VIEWABILITY GUIDELINES

SOME ADVERTISERS & AGENCIES **INSIST ON MUCH STRICTER GUIDELINES**

Even when applying minimum standards, studies show only 20% of a typical Facebook campaign is viewable

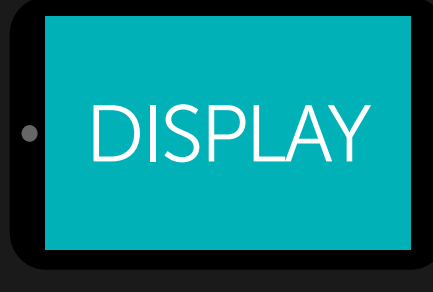


Source: Group M

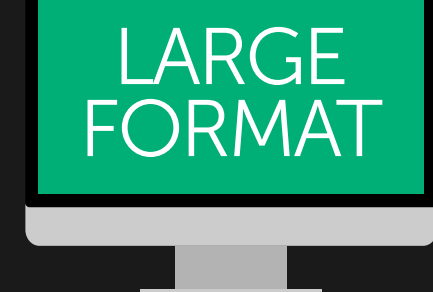
MRC GUIDELINES



= **50%**
of the ad
placement in
view, for at least
2 seconds



= **50%**
of the ad
placement in
view, for at least
1 second



= **at least 30%**
of the creative
in view, for at
least 3 seconds

AD BLOCKING

AD BLOCKING IS ON THE RISE



2014

U.S. Desktop Adblock Software Installs



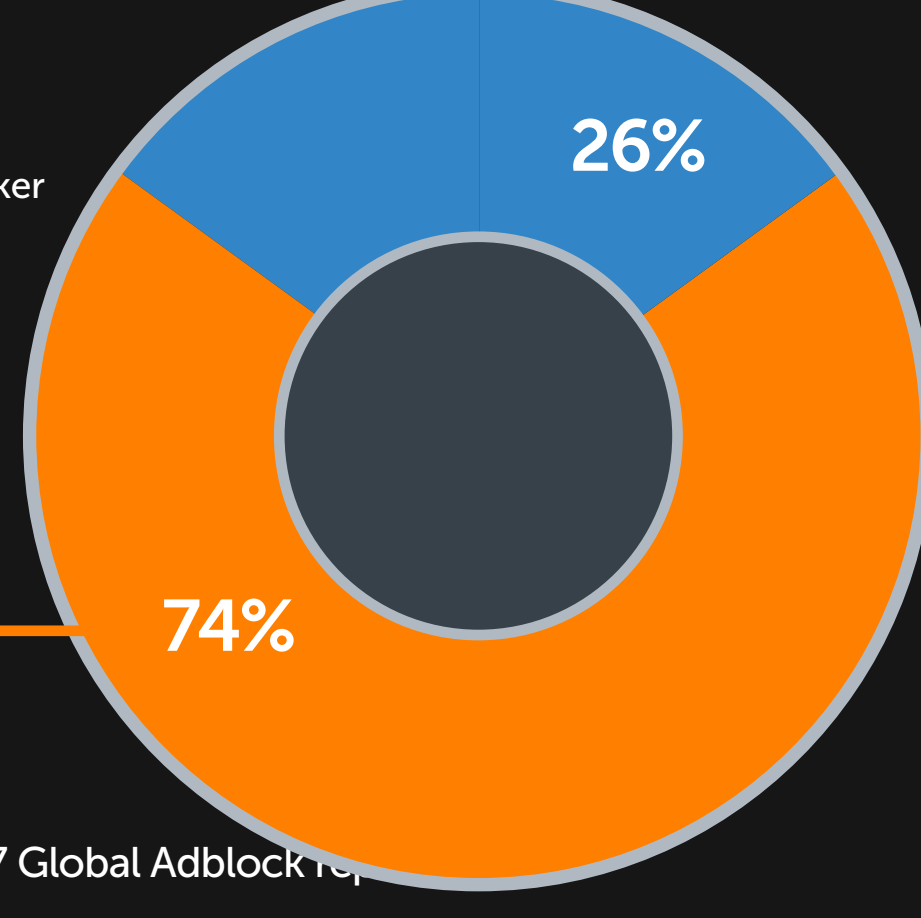
2016

Source: PageFair "The State of the blocked web/ 2017 Global Adblock report"

"ADBLOCK WALLS" ARE INEFFECTIVE AS **THREE-QUARTERS LEAVE WEBSITE**

AN "ADBLOCK WALL" BARS ADBLOCK USERS UNTIL THEY DISABLE THEIR ADBLOCKER ON SITE.

- Leave Website
- Disable Adblocker



Source: PageFair "The State of the blocked web/ 2017 Global Adblock report"

AD FRAUD

AD FRAUD IS COSTING INDUSTRY **BILLIONS A YEAR**



Source: Integral Ad Science

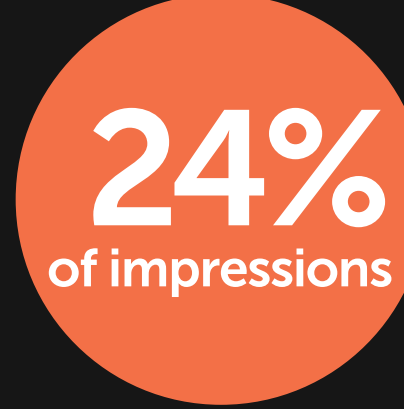
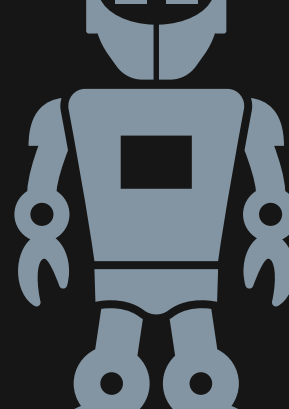
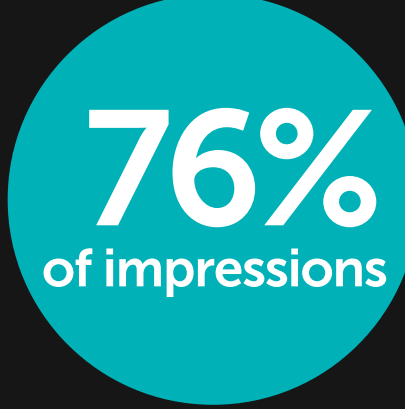
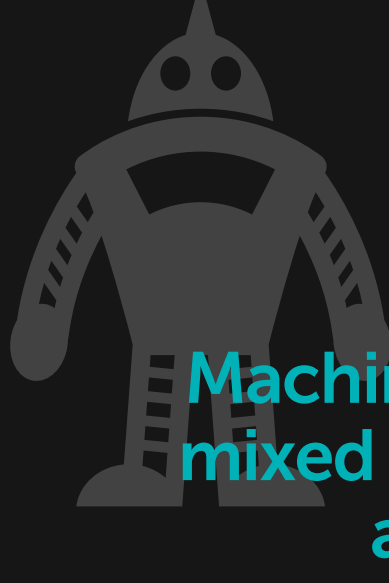
Ad Fraud is **88%** higher on home pages than on articles pages

Virtually any programmatic buy can be exposed to ad fraud

Source: Integral Ad Science, World Federation of Advertisers/Compendium of ad fraud, knowledge for media investors

BOTS

BOTS ARE GETTING BETTER AT RESEMBLING HUMANS

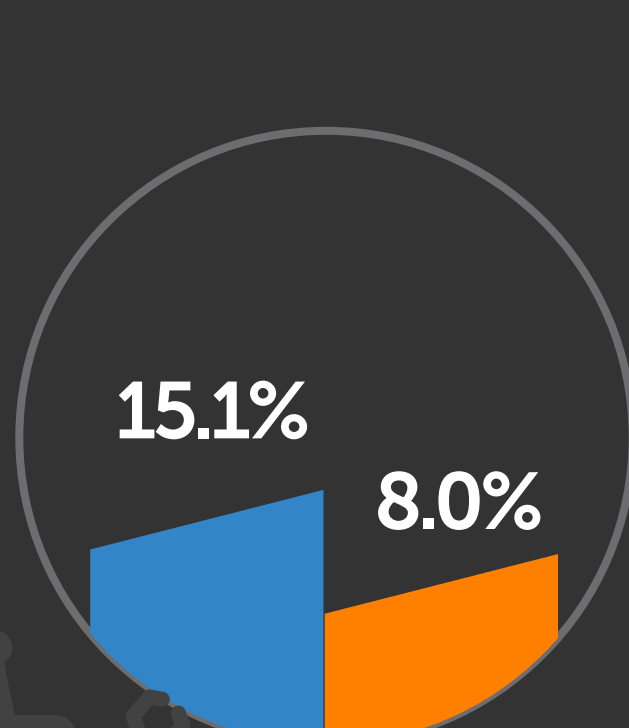
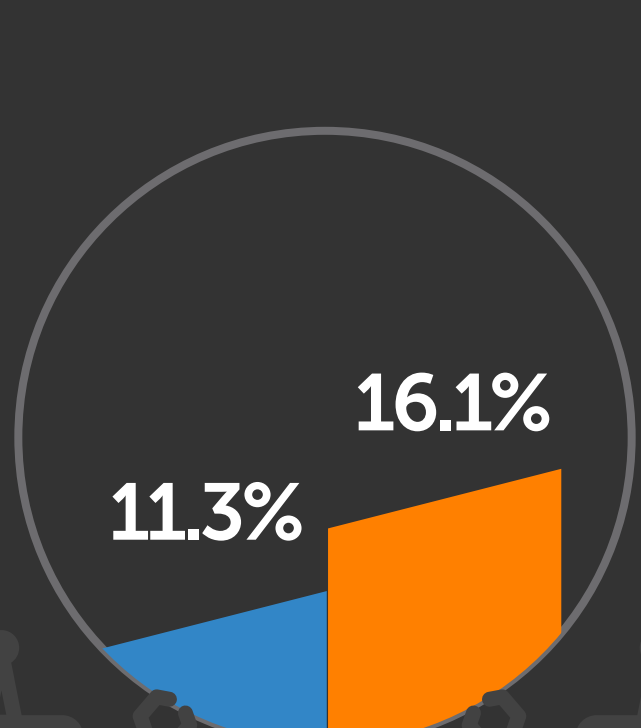
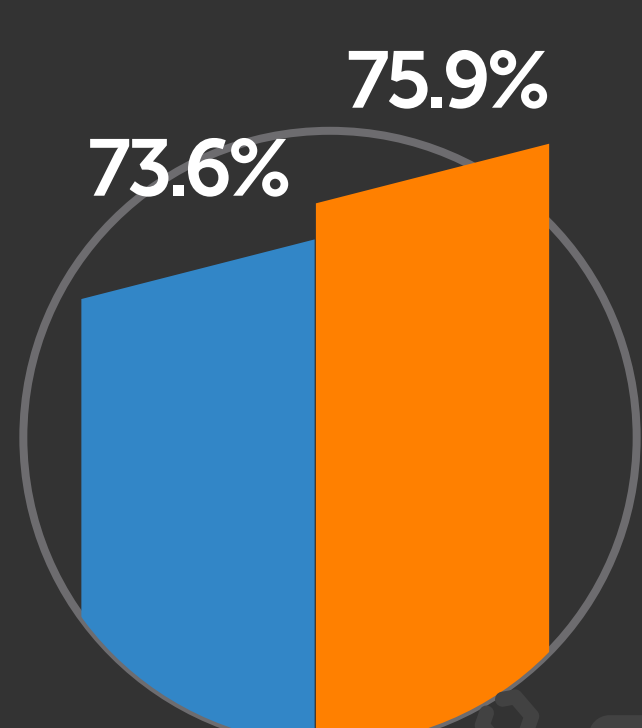


Source: BOT Baseline 16/17; ANA, Whiteops 5/17

BOTS IN THE WILD... **INCREASED 42% AMONG MOBILE USERS**

BAD BOTS REPORTED USER AGENT TYPES, 2016

- 2015
- 2016



Chrome, Internet Explorer, Safari Mobile Other

Source: Distil networks Bad Bot Report 2017