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# The Critical Need for Accredited Third-Party Measurement for Viewability of Digital Advertising

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# Background and Methodology

In summer 2015, the ANA conducted a member survey on the issue of independent third-party measurement for viewability of digital advertising. The current industry standard for a viewable display ad impression is a minimum of 50 percent of pixels in view for at least one second, and for a viewable digital video ad impression, a minimum of 50 percent of pixels must be in view for at least two continuous seconds. Meanwhile, viewability standards for mobile advertising are still under development.

Some large digital media owners do not allow third-party measurement vendors to report viewable ad impressions to their clients (more than 20 firms are accredited by the Media Rating Council to measure the viewability of digital advertising). Instead, they rely on internally derived metrics that have not been independently verified. This means marketers must trust the viewability metrics provided by those digital media owners, without any independent verification, to determine if their ads performed as contracted.

The purpose of the survey was to understand:

- Marketer familiarity with the issue of the need for independent third-party viewability measurement
- If marketers are confident that their media investments in digital platforms meet industry viewability standards
- If marketers think that the larger digital media owners should allow their inventory to be measured by a third party
- The impact of a digital media owner not providing third-party measurement
- Whether digital media owners should have their internally derived metrics accredited by the Media Rating Council (MRC)

In total, 154 client-side marketers are represented in the survey.

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November 2015

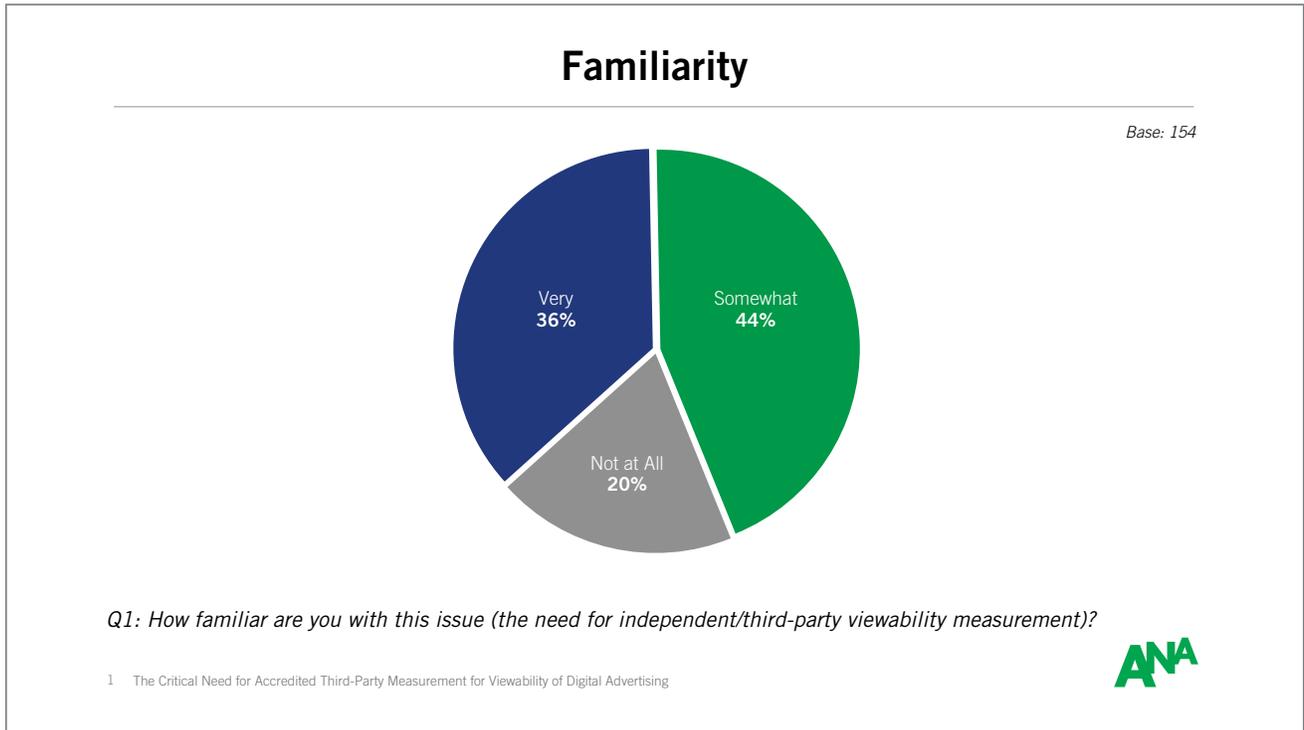
## Key Findings

1. An overwhelming 97 percent of marketers believe that the larger digital media owners should allow their inventory to be measured by a third party.
2. If a digital media owner does not provide third-party measurement, 61 percent of respondents would shift their spending elsewhere.
3. Sixty-five percent of respondents very strongly feel that a digital media owner should have its internally derived metrics accredited by the Media Rating Council.
4. The vast majority of respondents — 90 percent — are not fully confident that their working media dollars in digital platforms are being served in a manner that meets industry viewability standards. Sixty percent are “somewhat” confident and 30 percent are “not at all” confident.
5. Only 36 percent of marketers surveyed claim to be “very” familiar with the issue of the need for independent third-party viewability measurement. Meanwhile, 64 percent are either “somewhat” or “not at all” familiar.

# Detailed Findings

## Marketers Not Fully Aware of Measurement Needs for Viewable Ads

Only 36 percent of marketers surveyed claim to be “very” familiar with the issue of the need for independent third-party viewability measurement. Meanwhile, 64 percent are either “somewhat” or “not at all” familiar.

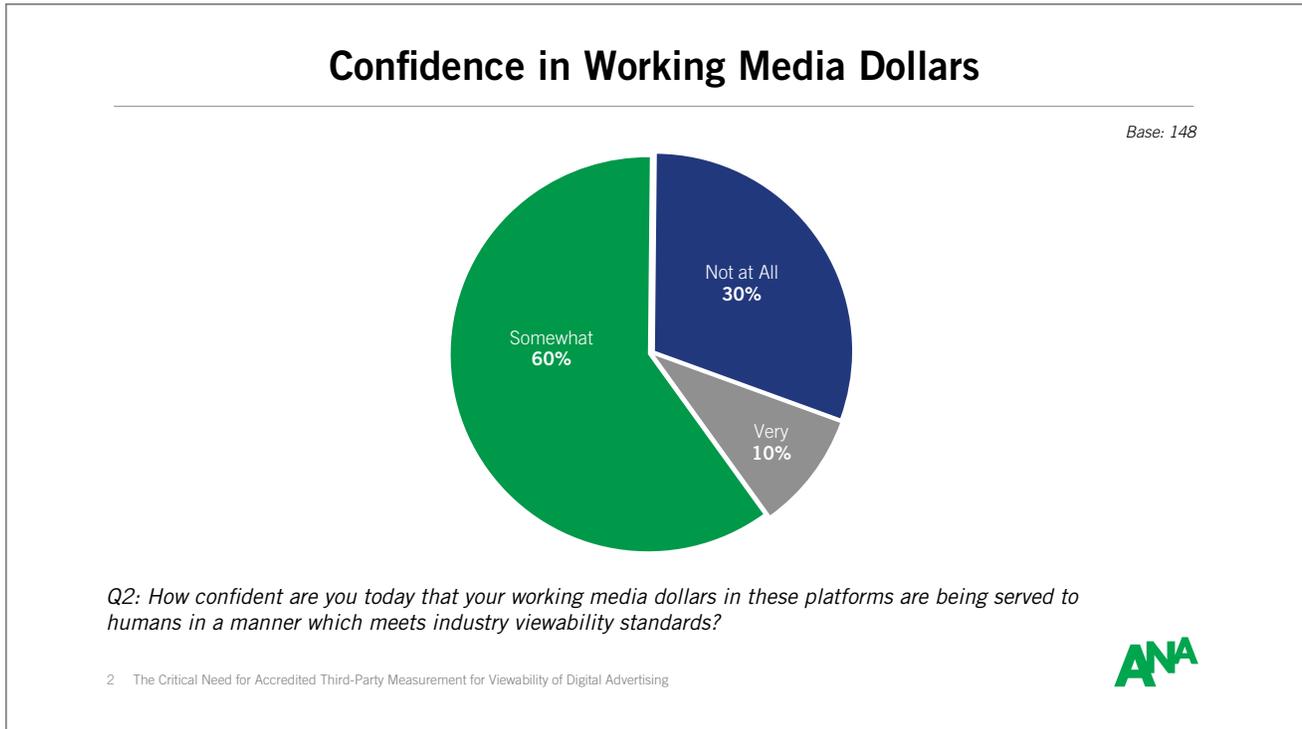


Marketers need to take note and be aware of measurement requirements for viewable ads to ensure that the money they are spending on digital advertising is being optimized. If their ads aren't being viewed, that spending is wasted.

The ANA intends to continue working with the Media Rating Council and our sister industry trade associations to elevate the importance of this issue and drive industry standards. The future of digital advertising measurement relies on having consistent industry standards and awareness of those standards by all in the ecosystem.

## Marketers Lack Confidence that Media Investments Meet Industry Viewability Standards

The vast majority of respondents — 90 percent — are not fully confident that their working media dollars in digital platforms are being served in a manner that meets industry viewability standards. Sixty percent are “somewhat” confident and 30 percent are “not at all” confident. An underwhelming 10 percent are “very” confident.

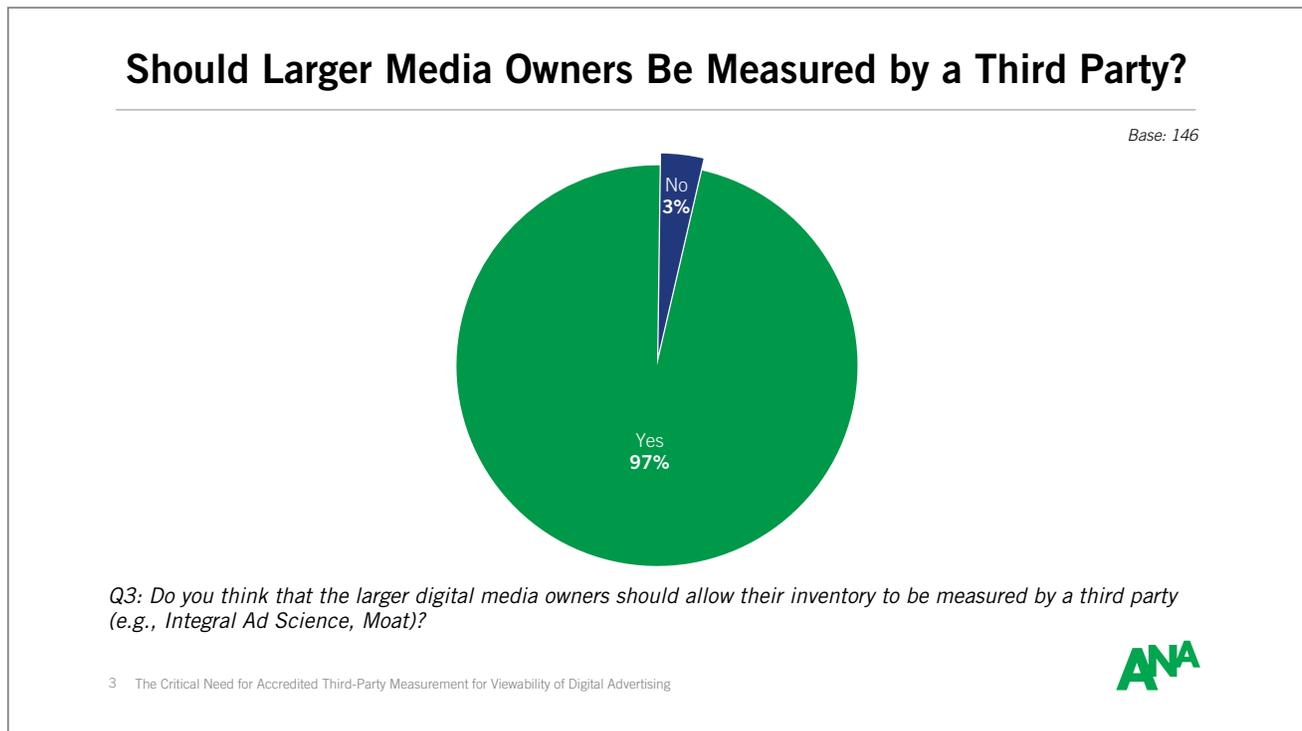


It's incumbent on digital media owners to ensure marketer confidence that media dollars are being invested in platforms that meet industry viewability standards. Because some parties do not adhere to accepted industry standards, it raises concerns and prevents proper comparisons — not only across digital media platforms, but the broader media landscape as well. Furthermore, this damages the industry's ability to develop effective cross-platform analytics and effective marketing mix models.

All digital media owners should allow their inventory to be measured for viewability by an accredited third party (i.e., the MRC) to help assure marketers that their media investments meet industry viewability standards.

## Marketers Believe Larger Digital Media Owners Should Be Measured by a Third Party

An overwhelming 97 percent of marketers surveyed believe that the larger digital media owners should allow their inventory to be measured by a third party.

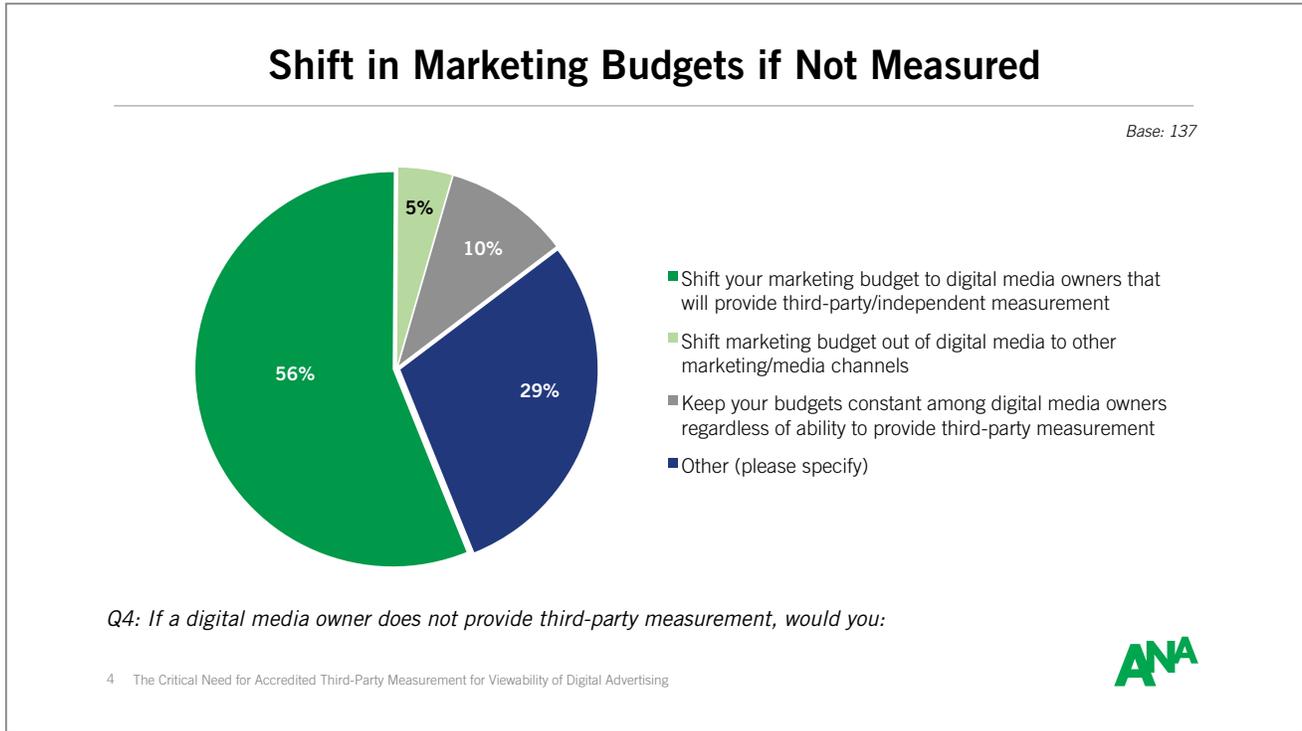


When we followed up to ask why the larger digital media owners should allow their inventory to be measured by a third party, representative verbatim responses included:

- “Transparency is a must these days.”
- “Transparent, independent measurement is a key tenet of credibility.”
- “It’s about financial accountability. Advertisers are expected to place investments in a responsible, effective manner. Without independent measurement, we cannot know if we are being responsible with our investments.”
- “We need independent third-party measurement for an unbiased reporting of proof of performance that is consistent across media sellers.”
- “Allowing the owners to self-report is fraught with conflicts of interest and leads to suspicion.”

### Without Third-Party Measurement, Spending Would Shift

If a digital media owner does not provide third-party measurement, 61 percent of respondents would shift their spending elsewhere.



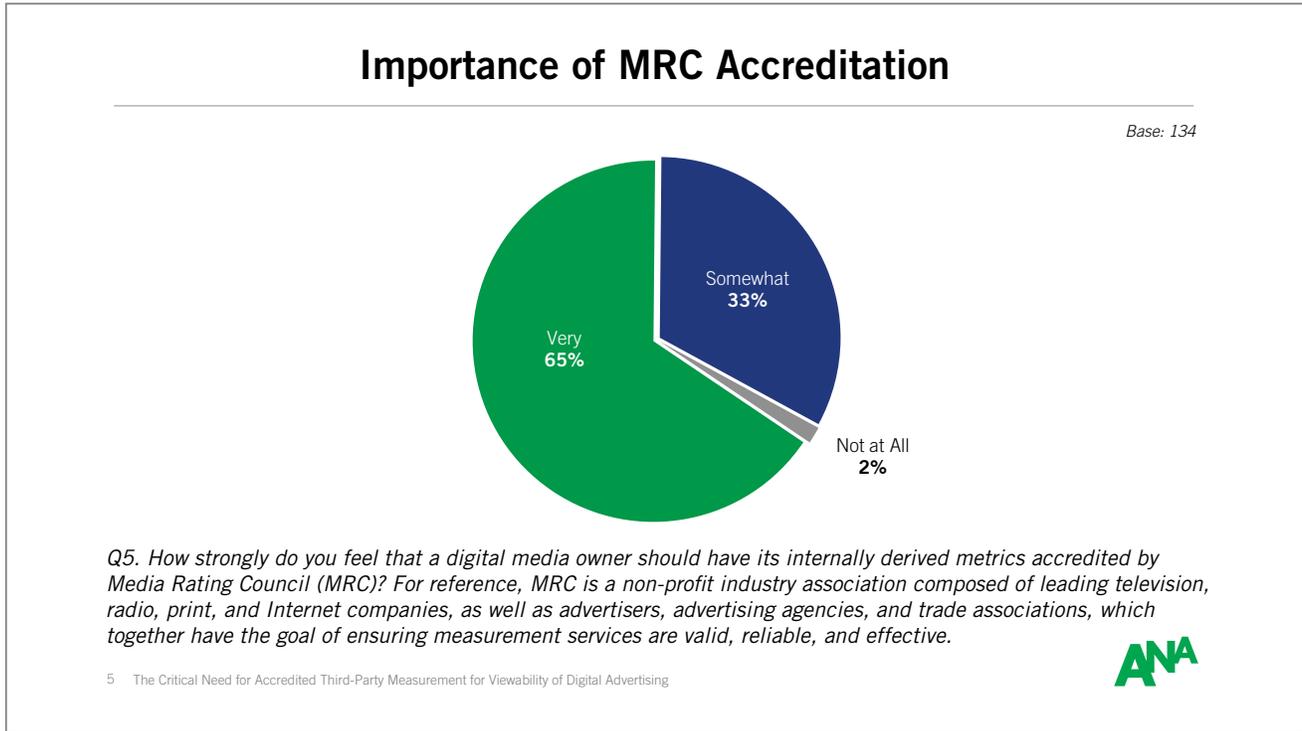
Of the 29 percent of marketers who responded “other,” many of the open-ended answers reflected a hybrid approach — meaning budgets would be shifted to some degree, but not entirely, away from those digital media owners who do not allow third-party verification.

***“Having lived through this measurement dilemma first-hand at Kellogg, the overwhelming response to this ANA survey does not surprise me, but is absolutely eye-opening. To see that 97 percent of marketer respondents want independent third-party measurement and that more than half are willing to move media budgets to digital partners who allow it speaks volumes. Clearly marketers are concerned, and it is imperative the media and measurement industry double down on collaborative efforts to make this happen.”***

— Aaron Fetters, senior vice president at comScore, Inc.;  
former ANA Research & Measurement Committee co-chair while director,  
global insights and analytics solutions center at the Kellogg Co.

### MRC Accreditation Is Important

Sixty-five percent of respondents “very” strongly feel that a digital media owner should have its internally derived metrics accredited by the Media Rating Council (MRC). Including those who “somewhat” agree brings this figure to 98 percent.



MRC accreditation provides a signal of confidence to the marketing industry that media measurement is valid, reliable, and effective.

Marketers and their agencies should only use third-party ad measurement vendors that have been accredited by the Media Rating Council for current industry-agreed viewability standards.

Internal viewability measurements used by digital media owners for non-commerce purposes should be MRC-accredited to help ensure comparability with commerce metrics.

Transparency and viewability continue to be critical issues among ANA members. According to the 2014 ANA/Forrester Research report “[Media Buying’s Evolution Challenges Marketers](#)”:

- Concerns about the level of transparency “between you, as the client, and your media agency or agencies” are on the rise.
- Concerns about “served versus viewed impressions” were top-rated among a list of a dozen transparency-related issues.

In a time of intense scrutiny on transparency and accountability, it is vitally important that:

- **All digital media owners allow their inventory to be measured for viewability by a third party.** The survey findings reveal that an overwhelming 97 percent of marketers believe that digital media owners should allow their inventory to be measured by a third party.
- **Internal viewability measurements employed by digital media owners should not be used for the purposes of conducting outside commerce.**
- **Marketers and their agencies should only use third-party ad measurement vendors that have been accredited by the Media Rating Council for current industry-agreed viewability standards.** MRC is an unbiased non-profit industry association which has the goal of ensuring measurement services are valid, reliable, and effective.
- **Internal viewability measurements used by digital media owners for non-commerce purposes should be MRC-accredited or IAB-certified<sup>1</sup>, to help ensure comparability with commerce metrics.**

The above, frankly, are “table stakes” for digital advertising.

We appreciate the support from the 4A’s and Alliance for Audited Media (AAM) on this perspective, and they have provided the following statements:



- 4A's: “The 4A's Measurement Task Force strongly endorses the findings of this survey and the push for third-party measurement. The 4A's feels that the growing importance of this issue is demonstrated by the fact that 61 percent of clients are willing to shift dollars to digital media owners which use independent measurement sources.”
- AAM: “The quality of the digital supply chain is only as strong as its weakest link. Marketers have a vested interest in ensuring that all the various technologies, platforms, and media channels on which their digital ads run have been independently verified as meeting industry-agreed standards. They must take the lead by demanding the accountability and transparency that comes with a third-party certification audit.”



<sup>1</sup>IAB certification is available to any measurement organization that does not want to bring an audit through the oversight of the Media Rating Council. Specifically, AAM, BPA, or a CPA firm (on its own) can conduct an audit based on IAB Guidelines (not using the additional MRC Minimum Standards for Media Rating Research) and can submit completion of that audit directly to IAB. IAB will then post that on its website as “certified.”

Please note that this is an evolving issue. When the survey originated, ANA members specifically called out Facebook, Google, and Twitter for not allowing third-party viewability measurement. Since then there have been a number of developments worth mentioning, as these companies have begun to open up to third-party measurement of viewable impressions.

- Facebook announced a partnership with Moat for measurement of digital video ads. That partnership is limited, as Facebook is maintaining control over the viewable decision-making, but it is a step in the right direction.
- Google has announced third-party viewability verification for YouTube through comScore, DoubleVerify, Integral Ad Science, and Moat. Note, however, per MRC, those are separate and distinct from the accredited services supplied by each of the vendors. Additionally, Google's DoubleClick for Publisher Active View measure is MRC-accredited, and the DoubleClick Campaign Manager Active View measure is currently in progress.
- Twitter has a partnership with Moat to allow third-party viewability measurement of digital video ads.

So it's a shifting technology landscape that can be difficult to keep up with, to say the least.

Bottom line: ANA strongly encourages marketers to demand greater transparency and accountability for their digital media investments, support accredited third-party verification, and ensure that includes the measurement of viewable impressions. Have an active voice, ask questions, and understand how your media investments are being measured and optimized. It's your money — invest it wisely.

***“ARF endorses MRC accreditation for viewability. We underline the importance of ANA’s call for third-party viewability measurement. Consistent standards will build C-suite confidence that marketing dollars in digital media are measurably driving brand growth and sales.”***

— Gayle Fuguitt, chief executive officer and president of the Advertising Research Foundation

***“We believe that third-party verification is a fundamental requirement. Publishers should not grade their own homework.”***

— John Wren, chief executive officer of Omnicom  
(October 20, 2015 during earnings call)

## About the ANA

The ANA (Association of National Advertisers) provides leadership that advances marketing excellence and shapes the future of the industry. Founded in 1910, the ANA's membership includes nearly 700 companies with 10,000 brands that collectively spend over \$250 billion in marketing and advertising. The ANA also includes the Business Marketing Association (BMA) and the Brand Activation Association (BAA), which operate as divisions of the ANA, and the Advertising Educational Foundation, which is an ANA subsidiary. The ANA makes a difference through advancing the interests of marketers and promotes and protects the well-being of the marketing community. For more information, visit [www.ana.net](http://www.ana.net), follow us on [Twitter](#), or join us on [Facebook](#).

## Additional ANA Resources

Marketers are encouraged to tap into the various resources of the ANA to learn more about the marketing industry:

**ANA Marketing Knowledge Center:** To find articles, toolkits, case studies, and presentations on a range of marketing topics, visit [www.ana.net/mkc](http://www.ana.net/mkc), or to submit a customized information request to our Research Service, visit [www.ana.net/asktheexpert](http://www.ana.net/asktheexpert).

**ANA Survey Research:** ANA surveys are based on topics identified by the ANA and its membership as critical issues and emerging trends that nearly all marketers face today. To access survey reports, which allow you to tap into members-only research and perspectives, please visit [www.anasurveys.net](http://www.anasurveys.net). To join our survey panel of more than 1,000 marketers and participate in industry leadership, please visit [www.ana.net/pulsesurvey](http://www.ana.net/pulsesurvey).

**ANA Insight Briefs:** ANA Insight Briefs are compilations of the ANA's best resources on a given subject. Filled with charts, quotes, and client-side marketer case studies, they provide today's busy marketer with top-line information on the hottest topics in marketing. For more information, please visit [www.ana.net/insightbriefs](http://www.ana.net/insightbriefs).

**ANA Committees:** ANA committees offer members a forum for sharing best practices, the opportunity for peer-to-peer networking and benchmarking, and the ability to learn about new industry developments through the exchange of ideas with guest speakers and fellow committee members. ANA committees also often take leadership roles in shaping industry issues. For more on ANA committees, please go to [www.ana.net/committees](http://www.ana.net/committees).

**ANA Conferences:** The ANA helps the marketing community stay abreast of cutting-edge trends and best practices via a comprehensive calendar of national conferences. In addition, the ANA goes on the road to offer members a portfolio of peer-to-peer gatherings that afford opportunities to discuss special needs in a convenient, informal setting. Find more information at [www.ana.net/events](http://www.ana.net/events).

**ANA School of Marketing:** The ANA School of Marketing offers marketers on-site training sessions and full-day classes that help marketers grow as brand builders. Find more information at [www.ana.net/schoolofmarketing](http://www.ana.net/schoolofmarketing).

# Appendix A: Survey Questionnaire

We are trying to learn more about the need for independent/third-party viewability measurement and would appreciate your time on a short survey (likely about two to three minutes to complete). The purpose of this survey is to get a baseline understanding of awareness and receive input on this issue from the overall ANA member community.

In a recent ANA committee meeting, there was discussion around the value of independent third-party measurement for viewability of digital advertising. The current industry standard for a viewable display ad impression is a minimum of 50 percent of pixels in view for at least one second, and for a viewable digital video ad impression, a minimum of 50 percent of pixels must be in view for at least two continuous seconds. Given that some of the larger digital media owners will not allow or are not working to technically enable their inventory to be measured by an independent third party, marketers at best need to rely on the metrics provided by the digital media owner to determine if their ad is viewable by a human and at worst have no transparency as to the performance of their digital media investment.

In addition, some of the larger digital media owners do not currently have their internally derived metrics audited by the Media Rating Council (MRC), and any independent third party should also be accredited by MRC. For reference, MRC is a non-profit industry association composed of leading television, radio, print, and Internet companies, as well as advertisers, advertising agencies, and trade associations, which together have the goal of ensuring measurement services are valid, reliable, and effective.

1. How familiar are you with this issue (the need for independent/third-party viewability measurement)?  
Very/Somewhat/Not at All
2. How confident are you today that your working media dollars in these platforms are being surveyed to humans in a manner which meets industry viewability standards?  
Very/Somewhat/Not at All
3. Do you think that the larger digital media owners should allow their inventory to be measured by a third party (e.g., Integral Ad Science, Moat)?  
Yes/No
  - a. Why/Why not? (for both yes and no answers)
4. If a digital media owner does not provide third-party measurement, would you:
  - a. Shift your marketing budget to digital media owners that will provide third-party/independent measurement
  - b. Shift marketing budget out of digital media to other marketing/media channels
  - c. Keep your budgets constant among digital media owners regardless of ability to provide third-party measurement
  - d. Other (please specify)
5. How strongly do you feel that a digital media owner should have its internally derived metrics accredited by the Media Rating Council (MRC)? For reference, MRC is a non-profit industry association composed of leading television, radio, print, and Internet companies, as well as advertisers, advertising agencies, and trade associations, which together have the goal of ensuring measurement services are valid, reliable, and effective.  
Very/Somewhat/Not at All
6. Do you have any other comments on this issue? (open-ended)

## Appendix B: MRC-Accredited Viewability Vendors

The MRC provides a summary of MRC-accredited viewability vendors. Those are summarized below (as of the release of this white paper) with details and updates for [display-accredited](#) and [video-accredited](#) available on its website.

	Display Desktop	Video Desktop
Adloox	X	
AdYapper	X	
Chartbeat	X	
comScore vCE-V	X	X
DoubleVerify	X	X
Extreme Reach		X
Google Active View (DFP)	X	
Inovid		X
Integral Ad Science	X	X
Markit on Demand	X	
Meetrics	X	X
Moat	X	X
Mode (fka Glam Media)	X	
Pixalate	X	
RealVu	X	
Sizmek	X	
Telemetry		X
Tremor Video		X
Videology		X
Visible Measures	X	X
WebSpectator for Publishers	X	
Yahoo! APT	X	



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