

# TAG Fraud Snapshot: Asia-Pacific

September 2021

Research conducted by The 614 Group, commissioned  
by the Trustworthy Accountability Group

**614**  
GROUP

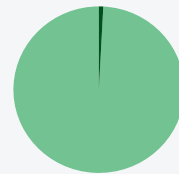


# Executive Summary

For the digital advertising industry to prosper, brand advertisers must be able to trust that their ads appear in brand-safe environments and that their ad spend is not wasted on fraudulent transactions. The Trustworthy Accountability Group (TAG) was founded in 2014 to foster such confidence and trust in digital advertising by facilitating players across the supply chain in working together to ensure quality and brand safety.

TAG's Certified Against Fraud Program ('TAG Certification') focuses on combating Invalid Traffic (IVT) across the digital advertising supply chain and provides companies with a means to publicly communicate their commitment to helping brands avoid IVT throughout the ad ecosystem. The 2021 TAG Asia-Pacific Fraud Snapshot study shows that TAG Certification does just that:

■ = <1% IVT



For the second year in a row, brands that buy through TAG Certified Channels in analyzed Asia-Pacific markets see IVT rates of less than 1%.

■ = 2019 rate 0.82%  
■ = 2020 rate 0.41%



The 2020 TAG Asia-Pacific Fraud Snapshot rate in TAG Certified Channels of 0.41% represents a significant decline from the 0.82% rate measured in 2019.



The study analysed a total of 10 markets: **Australia, Cambodia, India, Indonesia, Japan, Myanmar, New Zealand, Singapore, Thailand and Vietnam.**



The value of TAG Certification is increasingly recognized in the region and, based on the qualitative portion of the study, is estimated to be used for a majority of digital media campaigns in the Asia-Pacific region.



Education continues to be an imperative for individual markets. To ensure continued low IVT rates, comprehension and adoption of industry best practices against ad fraud will be critical.

# Study Background and Objectives

The digital advertising industry has long acknowledged that the fight against fraud requires a concerted effort, with all market participants working together to ensure traffic quality and brand safety.

Since 2017, TAG has collaborated with The 614 Group to monitor the industry's progress in reducing IVT by measuring the effectiveness of buying through TAG Certified Channels in markets around the globe. This second annual Asia-Pacific Snapshot study was conducted by The 614 Group during 2020 and measured the quantitative impact TAG Certification has had in reducing fraud in actual campaigns across 10 Asia-Pacific markets (**Australia, Cambodia, India, Indonesia, Japan, Myanmar, New Zealand, Singapore, Thailand and Vietnam**). The study also used interviews to assess the response taken by agencies when they discover IVT in a campaign in the region.





# Research Methodology

This report uses the methodology established by The 614 Group in 2017 for the first US benchmark study and subsequently has been used in similar TAG Fraud Benchmark studies since then.

From January 1, 2020 to December 31, 2020, The 614 Group analyzed data from leading agency holding companies -- along with their MRC-accredited measurement vendors -- to collect and aggregate all impressions for campaigns that were executed in 10 Asia Pacific countries: **Australia, Cambodia, India, Indonesia, Japan, Myanmar, New Zealand, Singapore, Thailand and Vietnam**. These impressions included display media and video ads in desktop, mobile web and in-app environments, as well as Over the Top Television (OTT and / or Connected TV (CTV) which is a subset). The analysis did not use sampling of any kind, as 100% of the impressions provided by the agencies were analyzed.

Upon receipt, all data was aggregated within a secure database in order to create the proper reporting. In addition, The 614 Group conducted a series of industry expert interviews with executives at agencies and others on background for qualitative perspectives.

## Study Elements

<p><b>Inventory Type</b></p> <p>Desktop Display &amp; Video</p> <p>Mobile Web Display &amp; Video</p> <p>In-App Display and Video</p>	<p><b>Types of Fraud Examined</b></p> <p><b>GIVT</b></p> <p><b>SIVT</b></p>	<p><b>Volume of Impressions Examined</b></p> <p><b>99.7</b></p> <p>billion</p>
<p><b>Measurement Period</b></p> <p><b>1</b></p> <p>Jan. 2020</p> <p>-</p> <p><b>31</b></p> <p>Dec. 2020</p>	<p><b>Markets Analyzed</b></p> <p>India</p> <p>Japan</p> <p>New Zealand</p> <p>Australia</p> <p>Singapore</p> <p>Indonesia</p> <p>Cambodia</p> <p>Myanmar</p> <p>Thailand</p> <p>Vietnam</p>	<p><b>Data Contributors</b></p> <p></p> <p></p> <p></p>

The 614 Group used the categorization of the ad impressions by the agencies' measurement vendors, including DoubleVerify, Integral Ad Science (IAS) and Moat by Oracle Data Cloud (Moat). These three anti-fraud measurement vendors are all TAG Certified Against Fraud and hold accreditations from The Media Rating Council (MRC) that include IVT measurement for both Sophisticated Invalid Traffic (SIVT) and General Invalid Traffic (GIVT).

Fraud is a generic term, encompassing a range of nefarious activities. For the purposes of this report, the results focus on the broader metric of IVT, which The MRC defines as, *"traffic that does not meet certain ad serving quality or completeness criteria, or otherwise does not represent legitimate ad traffic that should be included in measurement counts."*

The MRC separates IVT into two categories<sup>1</sup>:

**General Invalid Traffic (GIVT):** Includes traffic identified through routine and list-based means of filtration -- such as bots, spiders, other crawlers; non-browser user agent headers; and pre-fetch or browser pre-rendered traffic.

**Sophisticated Invalid Traffic (SIVT):** Includes traffic identified through advanced analytics, multipoint corroboration, human intervention -- such as hijacked devices, ad tags, or creative; adware; malware; misappropriated content.

In calculating fraud rates, the study combined both SIVT and GIVT in order to achieve a comprehensive result.

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<sup>1</sup> [http://mediaratingcouncil.org/101515\\_IVT%20Addendum%20FINAL%20\(Versio%201.0\).pdf](http://mediaratingcouncil.org/101515_IVT%20Addendum%20FINAL%20(Versio%201.0).pdf)

The quantitative analyses examine both TAG Certified Channel transactions and transactions where each impression does not pass exclusively through TAG Certified Channels. To understand the two types of transactions analyzed herein, it is important to understand the definitions of a TAG Certified Channel and a Non-Certified Channel:



**TAG Certified Channel (TCC)**

Transactions that flow through channels in which multiple entities involved in the transaction – such as the media agency, buy-side platform, sell-side platform, and / or publisher – have achieved the TAG Certified Against Fraud Seal.

**Non-Certified Channels**

Transactions that flow through channels in which one entity involved in the transaction has achieved the TAG Certified Against Fraud Seal, but not enough entities for the channel to qualify as TCC. For example, in a Non-Certified Channel, the media agency would have achieved the TAG Certified Against Fraud Seal, but other key entities - the buy-side platform, sell-side platform, and/or publisher - would not have achieved the Seal.

# Quantitative Results

TAG Certified Channels in the analyzed Asia-Pacific markets have an overall IVT rate of just 0.41%.

## IVT Rates: All Media

### % IVT Found in TAG-Certified Channels



### % IVT Found in Non-Certified Channels



**TAG-Certified Channels  
IVT Rates: By Media  
Type Full Year**

		<b>Number of Impressions</b>	<b>IVT Rate in TAG-Certified Channels</b>
Desktop	Display	5.3 billion	1.30%
	Video	2.2 billion	0.91%
Mobile Web	Display	12 billion	0.44%
	Video	2.4 billion	0.43%
Mobile In-App	Display	18.6 billion	0.39%
	Video	32.1 billion	0.23%
CTV	Video	92 million	0.53%



**TAG-Certified Channels IVT  
Rates By Media Type by  
Quarter**

		<b>2020 Q1</b>	<b>2020 Q2</b>	<b>2020 Q3</b>	<b>2020 Q4</b>
<b>Desktop</b>	Display	1.30%	1.98%	0.92%	1.23%
	Video	0.79%	0.70%	1.02%	1.16%
<b>Mobile Web</b>	Display	0.47%	0.87%	0.27%	0.33%
	Video	0.46%	0.34%	0.33%	0.84%
<b>Mobile In-App</b>	Display	0.42%	0.29%	0.38%	0.46%
	Video	0.17%	0.15%	0.31%	0.43%

**Year-Over-Year Comparisons**

<sup>2</sup> In 2019 ad server reporting for Indonesia likely included Cambodia, Myanmar, Thailand and Vietnam.

	<b>2019</b>	<b>2020</b>
<b>Region</b>	Australia India Indonesia <sup>2</sup> Japan New Zealand Singapore	Australia Cambodia India Indonesia Japan Myanmar New Zealand Singapore Thailand Vietnam
<b>Types of Fraud Measured</b>	GIVT SIVT	GIVT SIVT
<b>Volume of Certified Benchmark</b>	3.17 billion	99.7 billion
<b>Inventory Types Examined</b>	Desktop (combined) Mobile Web (combined) Mobile In-App (combined)	Display (Desktop, Mobile Web, Mobile In-App) Video (Desktop, Mobile WEb, Mobile In-App) OTT/CTV
<b>Number of Participating Agencies</b>	Two Holding Companies	Three Holding Companies
<b>Overall Fraud Rates</b>	<b>0.82%</b>	<b>0.41%</b>

The qualitative portion of the research consisted of extensive interviews with senior executives at three agency holding companies to gain insights regarding the state of IVT identification, mitigation, and prevention. The purpose of the qualitative research is to supplement the quantitative impression-level data with a deeper understanding of requirements, accountability, and best practices in current use across the analysed Asia-Pacific markets.

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Managing Director - APAC

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Director, Ad Technology

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Associate Director, Programmatic  
Trading Operations

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# Qualitative Analysis

Three insights that can be drawn from this analysis:

**1. The value of TAG Certification is increasingly recognized and valued in the Asia-Pacific region, and a majority of media buys now run through TAG Certified partners.**

One major agency told us that, “the majority of our buys are going through TAG Certified Channels at this point.” A second concurred, stating that, “we only operate with verified partners - certainly in programmatic.”

**2. Know Your Partners...and Their Practices**

During our interviews, agencies pointed to the importance of knowing who a company’s trading partners are, as well as whether those partners deploy the most up-to-date protocols for detecting and preventing IVT. For instance, one person said, “Having only VAST tags will certainly open vulnerabilities for video traffic to be targeted by fraudsters and something we need to work with our partners on to ensure all the necessary requirements are in place to minimise fraudulent traffic.”

When the most current protocols are implemented, companies receive more accurate signals and that greater transparency helps to prevent fraud. There is precedent to suggest that failure to deploy the most recent industry protocols fosters a more opaque environment where criminals can hide and flourish.

**3. Global and Local Clients Have Different Points of View on Buying “safety;”**

There appears to be a dichotomy between global and local clients in the Asia-Pacific markets analysed (e.g. a global CPG vs. a local advertiser) with regard to ensuring IVT-free inventory, and cost appears to be a significant driver of this disparity. Global advertisers have invested in the mechanisms required to ensure they purchase legitimate impressions. Local advertisers are continuing to learn about the benefits of programs like TAG Certification and tools like filtering and blocking, and they traditionally have been less willing to invest in such brand safety measures. Education in Asia-Pacific markets continues to be a priority to help advertisers understand the holistic benefits of buying safely.

# Conclusion

IVT rates in the analyzed Asia-Pacific markets continue to decline, decreasing from 0.82% in 2019 to just 0.41% in 2020. The overall IVT rate of 0.41% in TAG Certified Channels is a remarkable achievement and speaks to the success of transacting with TAG partners who are Certified Against Fraud, as well TAG's developing industry partnerships in the Asia-Pacific region.

The low overall IVT rate is an impetus for partners to seek out inventory that flows through TAG Certified Channels. Adoption is up, as demonstrated by the fact that those interviewed stated that a majority of campaigns in the Asia-Pacific markets analyzed now run through TAG Certified Channels.

Education continues to be an imperative for individual markets in the Asia-Pacific region, particularly with regard to local advertisers who may still resist paying for brand safety protocols.



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