



# **TAG US FRAUD BENCHMARK REPORT NOVEMBER 2023**

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A report conducted by The 614 Group,  
commissioned by TAG





# EXECUTIVE SUMMARY

Trust is the foundation of a healthy digital advertising industry. That trust begins with advertisers having confidence that their ads appear in brand safe environments and that their advertising budgets are well-protected from fraudulent activities.

TAG was founded in 2014 to foster such confidence and trust in digital advertising by helping companies throughout the industry work together to fight criminal activity and promote brand safety. Specifically, TAG's Certified Against Fraud Program (TAG Certification) focuses on combating invalid traffic (IVT) across the digital advertising ecosystem and provides companies with a means to publicly communicate their commitment to helping brands avoid IVT.

## THE FINDINGS OF THE ANNUAL BENCHMARK REPORT INCLUDE:



### US IVT RATES HELD BELOW 1% FOR THE 3RD CONSECUTIVE YEAR

The IVT rate in TAG Certified Channels (TCCs) is 0.82%, a decline from last year's rate of 0.98%. This marks the third consecutive year in which IVT rates in TAG Certified Channels were held under 1%.



■ = 787.2 billion in 2022  
■ = 871.9 billion in 2023

### INCREASING TAG ADOPTION SEEN IN GROWTH IN MEASURED AD IMPRESSIONS

Year-over-year, ad impressions measured increased from 787.2 billion to 871.9 billion, up 10.78%, demonstrating the broader adoption of TAG certification standards across the industry.



### 45.8% HIGHER IVT RATES IN NON-CERTIFIED CHANNELS

The importance of transacting inventory through TAG Certified Channels -- i.e. channels in which the entire supply chain is TAG Certified -- is more evident when it is compared to Non-Certified Channels (NCCs). There the overall IVT rate is 1.19%, which is 45.8% higher than rates found in TAG Certified Channels.



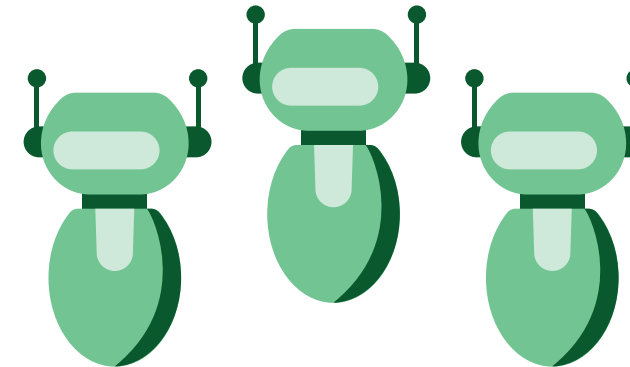
### SUB-1% IVT BENCHMARK NOW INCLUDED IN AGENCY CONTRACTS

From interviews with executives at major agency holding companies, several key findings emerged, including a validation of the sub-1% IVT rate as the consensus benchmark in the industry for acceptable inventory, with a majority confirming that benchmark is now included in agency contracts and that media agencies distribute the TAG Benchmark reports to at least 1,500 client companies.



### **BETTER DEFINITIONS AND MEASUREMENT NEEDED FOR MFAS**

Interviewees felt significant work still needed to be done by the industry around Made for Advertising (MFA) sites, particularly on definitions and measurement, to separate legitimate publishers from bad actors.



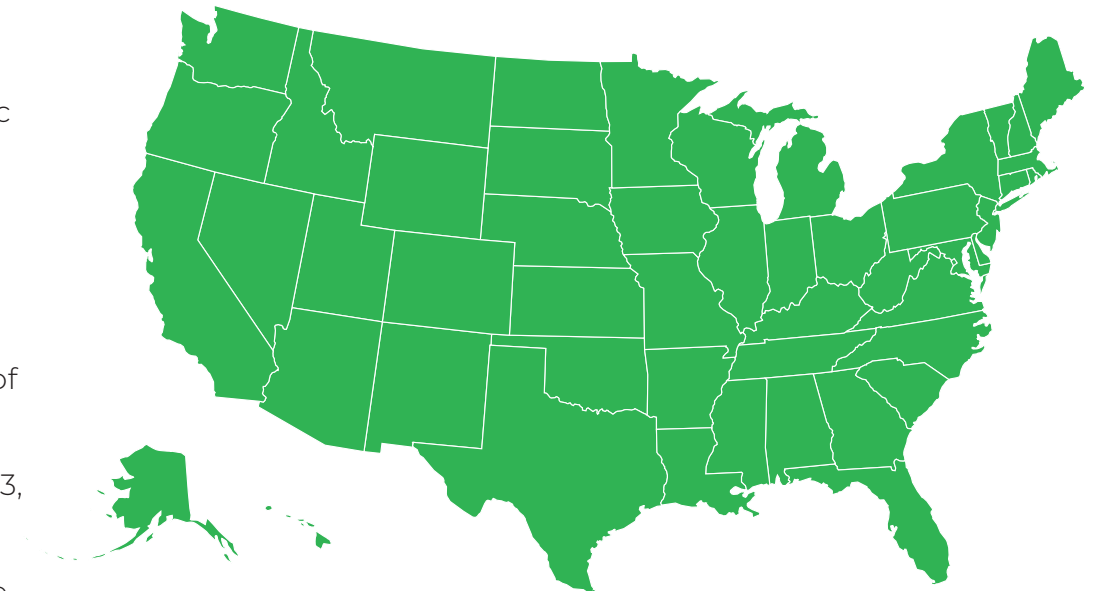
### **AGENCY EXECS NEED EDUCATION AROUND AI TO REALIZE BENEFITS**

Agencies are also focused on the opportunities and risks from the rapid integration of AI. While many noted it was too early to predict the full impact of AI, there was a consensus that more education was needed for agency execs and that the technology had a significant potential for good, as well as enabling more malicious activity.

# STUDY BACKGROUND & 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 (TCC) in markets around the globe. Throughout 2023, The 614 Group conducted its seventh annual benchmark study to measure the quantitative impact of TAG Certification in reducing fraud in digital ad campaigns across the United States.



# RESEARCH METHODOLOGY

This report uses the methodology established by The 614 Group in 2017 for the first TAG US Benchmark Study and followed in all benchmark studies undertaken around the globe from that point forward.

From January 1, 2023 to June 30, 2023, The 614 Group collected data from leading agency holding companies - along with their MRC-accredited measurement vendors - to analyze and aggregate impressions for US campaigns. These impressions included display media and video ads in desktop, mobile web, and in-app environments, as well as connected television (CTV). The analysis did not use sampling of any kind, as 100% of the impressions received from the agencies who shared data 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 major agency holding companies on background for qualitative perspectives.

## STUDY ELEMENTS

<p><b>Inventory Type</b></p> <p>Desktop Display &amp; Video</p> <p>Mobile Display &amp; Video</p> <p>In-App Display &amp; Video</p> <p>CTV</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>871.9 billion</b></p>
<p><b>Measurement Period</b></p> <p><b>1 Jan. 2023 - 30 June 2023</b></p>	<p><b>Markets Examined</b></p> <p><b>United States</b></p>	<p><b>Data Contributors</b></p> <p>dentsu group<sup>m</sup></p> <p>horizon media IPG</p> <p>OMG OmnicomMediaGroup PUBLICIS GROUPE</p>

In conducting the study, 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 ad verification vendors are all TAG Certified Against Fraud and hold accreditations from the Media Rating Council (MRC) that include measurement for both Sophisticated IVT (SIVT) and General IVT (GIVT).

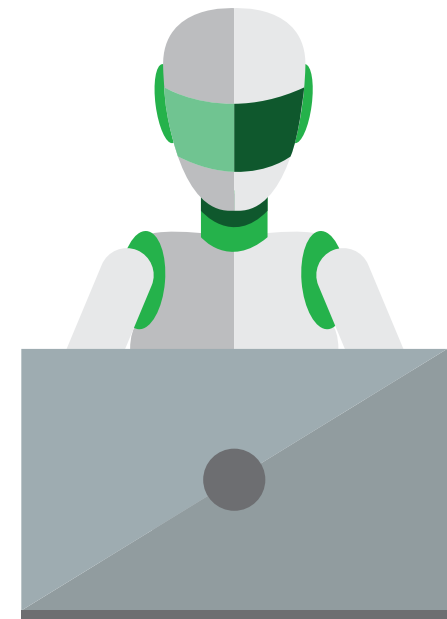
Fraud is a generic term, encompassing a range of nefarious activities. For the purposes of this report, the results focus on the broader metric of IVT, which the MRC defines as, "traffic that does not meet certain ad serving quality or completeness criteria, or otherwise does not represent legitimate 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\(Version%201.0\).pdf](http://mediaratingcouncil.org/101515_IVT%20Addendum%20FINAL%20(Version%201.0).pdf)

The quantitative analyses examine both TCC transactions and transactions where each impression did not pass exclusively through TCCs, as defined below.



### **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 (NCC)**

Transactions that flow through channels in which at least 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 might 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 certification.



# QUANTITATIVE RESULTS

The table below compares IVT rates in TCCs with IVT rates for transactions in NCCs. With fewer certified partners in those NCCs, the level of IVT is 45.8% higher than the 0.82% rate measured in TCCs, thus illustrating the benefits of working with TAG Certified partners to mitigate IVT in campaigns.

## IVT RATES: ALL MEDIA

<b>% IVT Found in TAG-Certified Channels</b>	<b>0.82%</b>
<b>% IVT Found in Non-Certified Channels</b>	<b>1.19%</b>

The number of impressions that media holding companies submitted to The 614 Group for analysis continues to increase year over year. In 2023 the 614 Group analyzed a total of 871.9 billion measured impressions, a 10.78% increase over last year's 787.1 billion impressions.

**SUMMARY OF IVT RATES  
IN TCCS BY MEDIA TYPE**

		Number of Impressions	IVT Rate in TAG Certified Channels
Desktop	Display	181.2 billion	1.51%
	Video	29.5 billion	1.78%
Mobile Web	Display	180.9 billion	0.45%
	Video	38.6 billion	0.42%
Mobile In-App	Display	104.6 billion	0.66%
	Video	69.5 billion	0.42%
CTV	Video	43.4 billion	0.16%

## YEAR-OVER-YEAR COMPARISON OF IVT RATES IN TCCS BY MEDIA TYPE

The year-over-year decline in IVT in 2023 is illustrated in the table below with IVT rates down in every media type other than mobile in-app video, which is essentially flat.

Of note, there are continuing declines in IVT over the last three years in mobile web both video and display.

		2021	2022	2023
Desktop	Display	1.15%	1.59%	1.51%
	Video	1.71%	1.79%	1.78%
Mobile Web	Display	0.63%	0.57%	0.45%
	Video	0.70%	0.61%	0.42%
Mobile In-App	Display	0.83%	0.83%	0.66%
	Video	0.48%	0.57%	0.42%
CTV		0.34%	0.49%	0.16%

**YEAR-OVER-YEAR  
COMPARISON  
OF ANNUAL  
US TAG FRAUD  
BENCHMARK  
REPORTS**

	2017	2018	2019	2020	2021	2022	2023
Region	US	US	US	US	US	US	US
Types of Fraud Measured	GIVT	GIVT/SIVT	GIVT/SIVT	GIVT/SIVT	GIVT/SIVT	GIVT/SIVT	GIVT/SIVT
Volume of Certified Benchmark Impressions	6.5 billion	75 billion	200 billion	353 billion	445 billion	581 billion	648 billion
Inventory Types Examined	Desktop Display Desktop Video	Desktop Display Desktop Video Mobile Web Display Mobile Web Video Mobile App Display Mobile App Video	Desktop Display Desktop Video Mobile Web Display Mobile Web Video Mobile App Display Mobile App Video	Desktop Display Desktop Video Mobile Web Display Mobile Web Video Mobile App Display Mobile App Video CTV	Desktop Display Desktop Video Mobile Web Display Mobile Web Video Mobile App Display Mobile App Video CTV	Desktop Display Desktop Video Mobile Web Display Mobile Web Video Mobile App Display Mobile App Video CTV	Desktop Display Desktop Video Mobile Web Display Mobile Web Video Mobile App Display Mobile App Video CTV
Number of Participating Agencies	3	5	6	6	6	6	6
Overall IVT Rates in TAG Certified Channels	1.48%	1.68%	1.41%	1.05%	0.86%	0.98%	0.82%

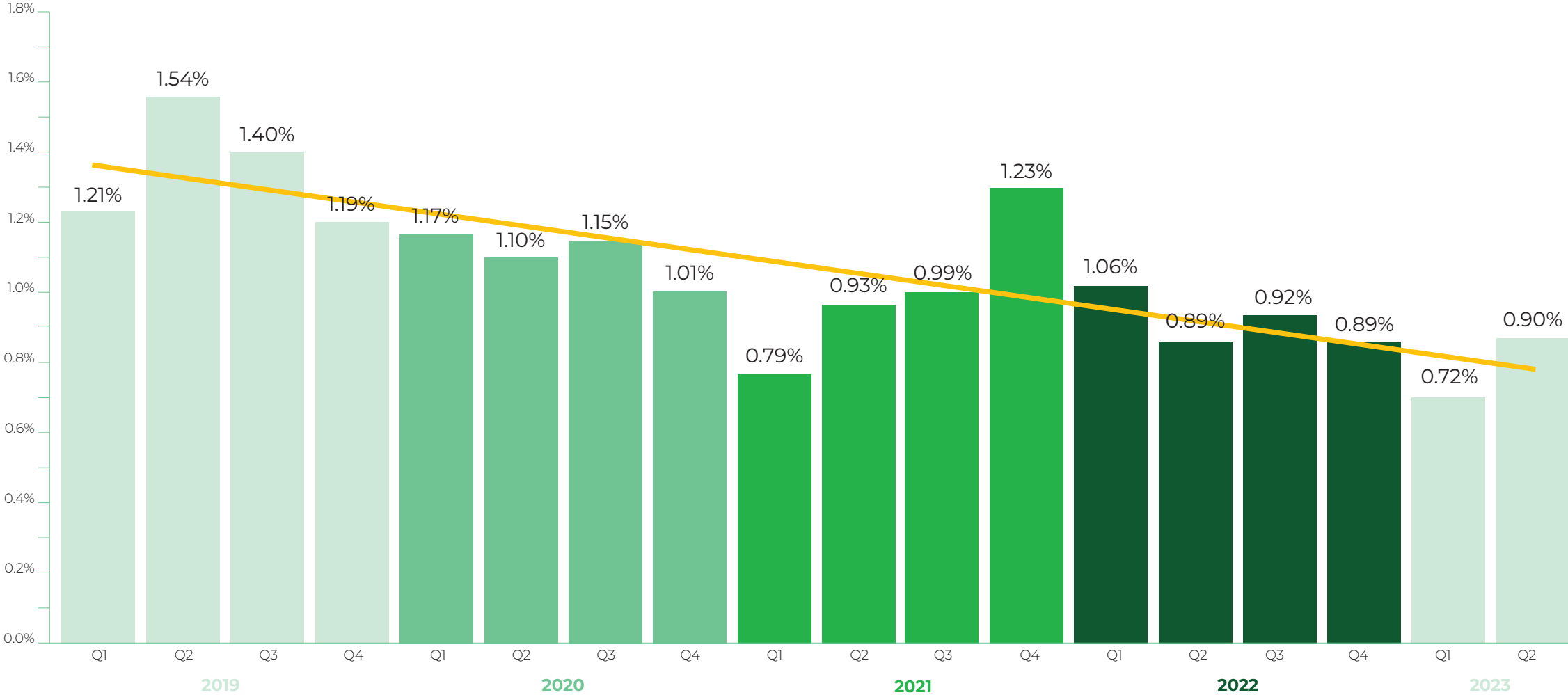
**COMPARISON OF IVT  
IMPRESSIONS AND GIVT/  
SIVT RATES WITHIN TCCS  
BY MEDIA TYPE**

	Media Type	Total Impressions	IVT Impressions	% GIVT	% SIVT	% IVT
<b>Overall</b>	All	648,010,603,809	5,283,769,530	0.23%	0.59%	0.82%
<b>Desktop</b>	Display	181,245,539,458	2,737,020,969	0.48%	1.03%	1.51%
	Video	29,554,993,797	524,815,233	0.66%	1.11%	1.78%
<b>Mobile</b>	Display	180,961,624,317	807,537,825	0.14%	0.31%	0.45%
	Video	38,633,592,160	160,762,950	0.10%	0.32%	0.42%
<b>Mobile In-App</b>	Display	104,644,905,437	694,191,869	0.06%	0.60%	0.66%
	Video	69,518,664,470	291,486,425	0.06%	0.36%	0.42%
<b>CTV</b>	Video	43,451,284,170	67,954,259	0.04%	0.12%	0.16%

### COMPARISON OF IVT RATES IN TCCS BY MEDIA TYPE AND PLATFORM BY QUARTER

		2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2
<b>Overall</b>		1.06%	0.89%	0.92%	0.89%	0.72%	0.90%
<b>Desktop</b>	Display	1.63%	1.54%	1.68%	1.60%	1.31%	1.69
	Video	2.04%	1.55%	1.86%	2.16%	1.59%	1.91%
<b>Mobile Web</b>	Display	0.68%	0.47%	0.41%	0.41%	0.41%	0.48%
	Video	0.71%	0.53%	0.51%	0.49%	0.34%	0.47%
<b>Mobile In-App</b>	Display	0.90%	0.78%	0.83%	0.77%	0.54%	0.76%
	Video	0.54%	0.60%	0.59%	0.59%	0.37%	0.45%
<b>CTV</b>		0.47%	0.50%	0.32%	0.39%	0.16%	0.15%

**YEAR-OVER-YEAR  
COMPARISON OF  
QUARTERLY IVT  
RATES IN TCCS**



# QUALITATIVE ANALYSIS

The qualitative portion of the research consisted of extensive interviews on background with executives at major agency holding companies. The purpose of the qualitative portion of the research is to supplement the impression-level data with a deeper understanding of issues, trends, and analyses of the data from the perspectives of executives leading those anti-fraud efforts

The following people were interviewed on background:



**Deva Bronson**

*EVP, Global Head of Brand Assurance*

**Simon Miners**

*Associate, Brand Assurance*

**Jessica Penny**

*Investment Management: Senior  
Manager, Brand Assurance,  
Sustainability & DEI*

**Joseph Swierczewski**

*Director, Brand Assurance*



**Julie Kandel**

*Senior Partner, Director of  
Brand Safety North America*



**Eric Warburton**

*SVP Ad Operations*



**William Bock**

*VP, Group Partner, Global  
Brand Safety*

**Chandon Jones**

*SVP, US Ad Operations*



**Anny Buakaew**

*US Group Director, Operations*

**Manny Mock**

*Associate Director, Operations*



**Tom Burns**

*Managing Director,  
Partnerships and Standards,  
EMEA*

Special thanks to Scott Cunningham of Cunningham.tech for supporting the data and analytics efforts in creating this report.



## SUB-1% IVT BENCHMARK SOLIDLY ESTABLISHED AS INDUSTRY FRAUD GOAL

One key finding from interviews with executives at major agency holding companies was a validation of the sub-1% IVT benchmark as the consensus goal in the industry for fraud, as a majority of interviewees said that benchmark is now included in their agency's contracts.

As one interviewee told us, "Our agency teams quote and reference the TAG IVT benchmark of less than 1%, and then we compare it to the number that we achieve. Our clients expect us to beat the standard, and we largely do. Our success lies in our philosophy of using MRC-accredited vendors and TAG Certified Against Fraud providers as part of our best practices."

Agencies executives interviewed also said that their teams share the report with their clients. In some instances, the report is used to compare individual campaigns to the benchmark, as well as the benchmark the agencies themselves seek to achieve. "We share the report with clients, and point out the benchmark is less than 1%," said one agency executive." It sparks healthy conversations between clients and account teams."

While the sub-1% IVT benchmark is universally accepted as the goal for IVT, one interviewee noted that the industry needs more than one benchmark for different channels and environments. "The industry has lagged in adjusting the standards by device or environment," said the interviewee "We say, here's our IVT benchmark, and we're trying to get to that without adapting to some basic realities about some environments. Some environments may need more restrictive benchmarks than others."

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**Our success lies in our philosophy of using MRC-accredited vendors and TAG Certified Against Fraud providers as part of our best practices.**



**The challenge with MFAs sites is that how they're defined is so subjective. We need to agree on a definition that doesn't throw the baby out with the bathwater.**

## INDUSTRY FACES CHALLENGES AROUND MFA DEFINITIONS AND MEASUREMENT

Interviewees felt significant work still needed to be done by the industry around Made for Advertising (MFA) sites, particularly on definitions and measurement, to separate legitimate publishers from bad actors.

The MFA challenge has been an active topic of conversation since the ANA released the [first look at its transparency report](#) in June 2023 showing that up to 21% of impressions purchased in the programmatic supply chain appeared on MFA sites.

Interviewees noted that there are still a lot of open questions about MFA sites, including whether or not they are inherently fraudulent. Agency executives had the common perception that IVT was more likely to appear on MFA sites, but they were also reluctant to label all MFA traffic as IVT.

One media executive lumped them with proxy networks and bot traffic, as “they are operating with the intent to deceive.” Another saw less of a fraud issue and stated that MFA sites are “there for a revenue perspective, not a fraudulent perspective. This means it's more of a question of brand suitability.”

Interviewees agreed that many of these issues stem from the lack of accepted definitions or measurements for MFA sites. As one interviewee noted, “The challenge with MFAs sites is how they're defined is so subjective. We need to agree on a definition that doesn't throw the baby out with the bathwater.”

## RAPID GROWTH OF AI REQUIRES EDUCATION, SHOWS OPPORTUNITIES FOR BENEFICIAL USES

Agencies are also focused on the opportunities and risks from the rapid integration of AI. While many noted it was too early to predict the full impact of AI, there was a consensus that more education was needed for agency execs and that the technology had a significant potential for good, as well as enabling more malicious activity.

As AI becomes increasingly integrated into advertising technologies and platforms, interviewees raised concerns over the lack of education among their executives. “It may still be early in the process, but our entire team needs to be smarter and better educated, or it will cause increasing missteps and problems,” said one executive.

The malicious and dangerous uses of AI are already becoming clear, as interviewees noted “increasing brand safety issues as bad actors churn out more misinformation. Unchecked and unverified, it will soon become very dangerous.” Another executive noted the risks around AI-generated content, saying, “MFA sites will increasingly rely on AI to assemble content and monetize it.”

While AI-related risks were clear to agency executives, they also noted the potential for responsible AI-powered tools to help address those challenges. “Good guys using AI are the best way to fight bad guys using AI,” said one executive.

Several executives also noted the long term potential benefits for the industry and consumers, with one saying, “the opportunity for good with AI is amazing.” Another interviewee agreed, “A lot of the technology is increasingly AI-powered already. Our hope is that it enhances brand safety tools, verification of MFA sites, and fraud prevention.”

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**It may still be early in the process, but our entire team needs to be smarter and better educated, or it will cause increasing missteps and problems.**



**It should be the same process in CTV around ad fraud and brand safety as we have in other channels where our ads are running.**

### **AS CTV MATURES, AGENCIES EXPECT SAME ANTI-FRAUD STANDARDS AS TRADITIONAL CHANNELS**

As CTV solidifies its important role in campaign budgets, agency executives are increasingly looking for the same robust anti-fraud standards and accurate measurement as they expect in traditional channels.

“It should be the same process in CTV around ad fraud and brand safety as we have in other channels where our ads are running,” said one executive. Convincing all stakeholders to adopt that holistic process will require increased education, said another, noting “blind spots still exist due to partner limitations and tagging.”

Although more work needs to be done to achieve similar transparency and equivalent anti-fraud standards in CTV, another executive commended the work that had been done to date. “Fraud rates going down while CTV spending goes up is a good thing,” added the interviewee.

# CONCLUSION



The 2023 TAG US Fraud Benchmark Report marks a cross-industry validation of a unified metric for success in the fight against ad fraud of a sustained IVT rate under 1%. For the last three years, TAG's Certified Against Fraud program has maintained that low, predictable, and sustained level of IVT in TAG Certified Channels in both the United States and worldwide.

In interviews with major agency holding companies, executives made clear that they accepted the sub-1% metric as the standard for their anti-fraud efforts, shared TAG reports on progress toward that goal with their clients, and codified the metric in their agency contracts.

Agency executives also offered aligned perspectives on many of the other top issues facing digital advertising, including MFA sites, the use of generative AI, and the growth of CTV.

On the MFA issue, agencies agreed that the industry needed to establish more objective and measurable definitions around MFA sites to help separate legitimate publishers from bad actors. They offered differing perspectives, however, on whether MFA sites were inherently fraudulent or merely a new approach to content that should not be classified as IVT.

Agency conversations around AI are still in their early stages, but there was broad agreement that executives needed to accelerate their educations around AI, so they could address the coming wave of AI-powered threats and take advantage of opportunities to use AI for good.

Finally, agency executives highlighted the growth and success of the CTV channel while expressing a consensus that CTV should be expected to implement the same level of fraud protections and measurement standards as other channels they use.

Across all those new and emerging issues, agency executives focused on the importance of leveraging the proven and successful programs and tools that have been implemented through TAG's certification programs. Put simply, they felt - and the numbers prove - the TAG model works, and it should be extended to help address the challenges faced today and in the future.



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