

# Mobile Fraud in India

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A collaboration between

**MOBILE MARKETING ASSOCIATION and DECISIONLAB**

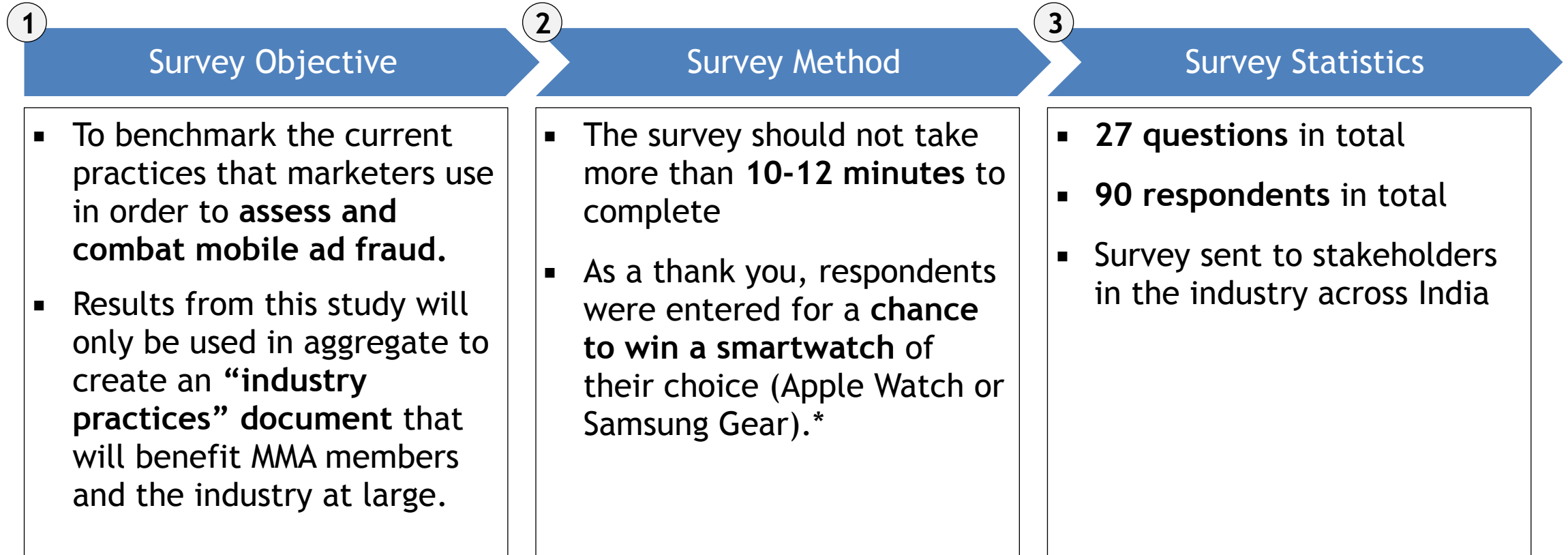
**NOVEMBER 2019**

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# Research Overview: India benchmark of marketers' attitudes and practices in relation to mobile fraud





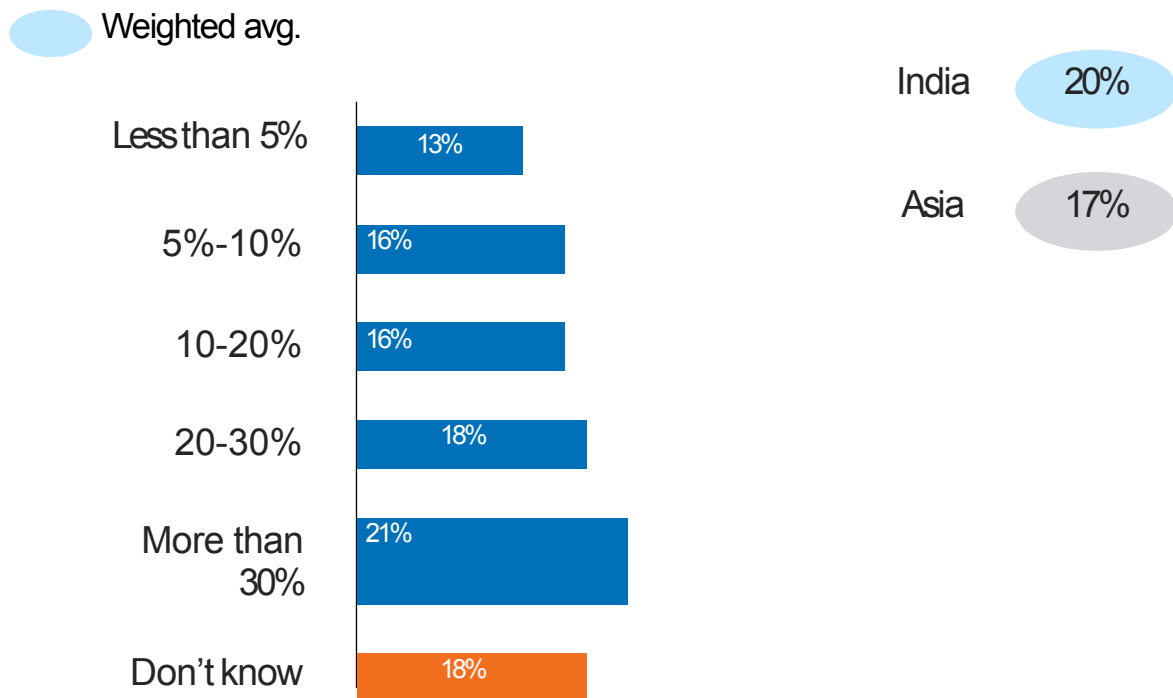
# Executive Summary

- Mobile Ad Fraud is the top marketing challenge that companies are currently combatting, it is expected to increase in the future.
- The perpetrator is believed to be benefiting from the fraud and it is furthered by the lack of penalties and transparency between partners.
- The most common approach when it comes to preventing and tackling fraud is to involve external solution. Popular providers are Intergal Ad Science and Moat.
- Marketers' needs for real time analysis and proactive tracking have been addressed by the vendors.
- Marketers are satisfied with the service received but not many claim to have completely eliminated ad fraud.
- Help from the industry is highly appreciated, including self assessment tools and guidelines on how to prevent fraud.



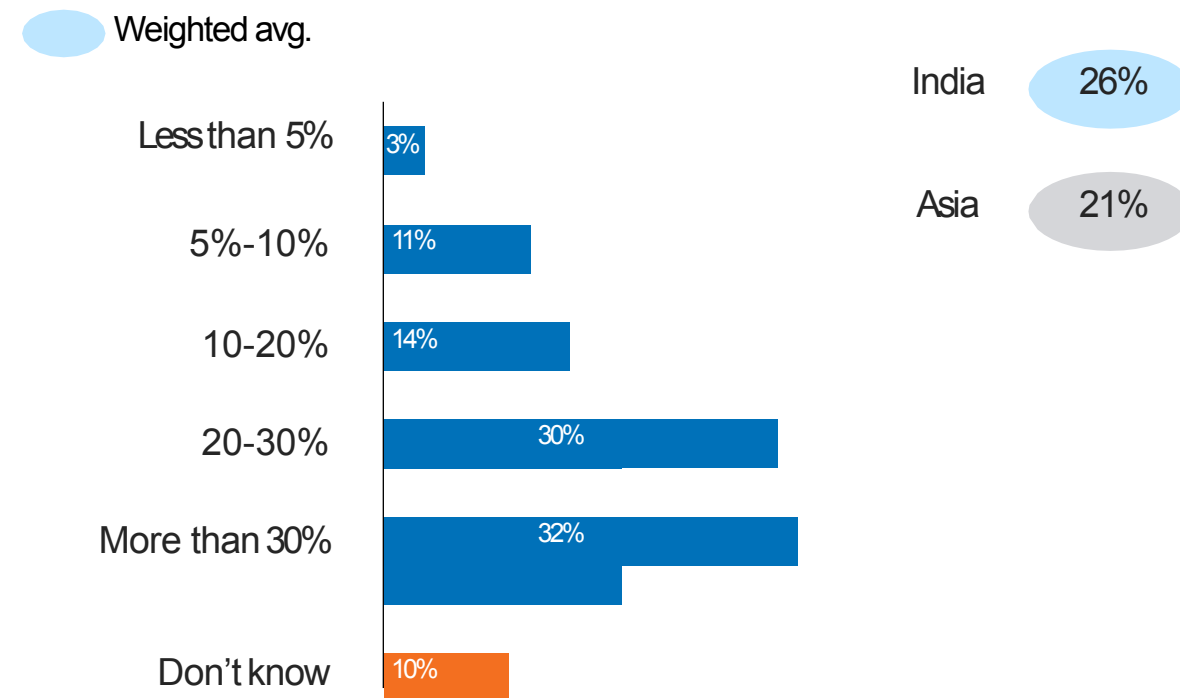
# Indian marketers are spending more than the regional average

To the best of your knowledge, how much of your mobile advertising budget is subject to ad fraud?



A fifth of the marketers are unclear about the level spendings for the subject

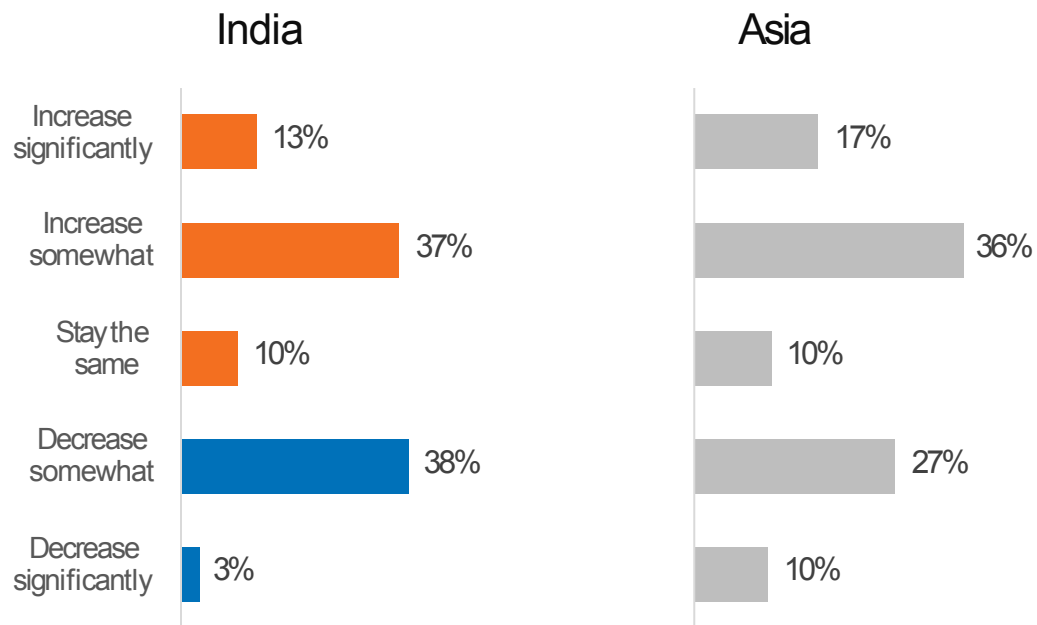
To the best of your knowledge, what is the industry average when it comes to mobile ad fraud? (% of mobile ad spend subject to fraud)



Indians believe they are spending more than the region

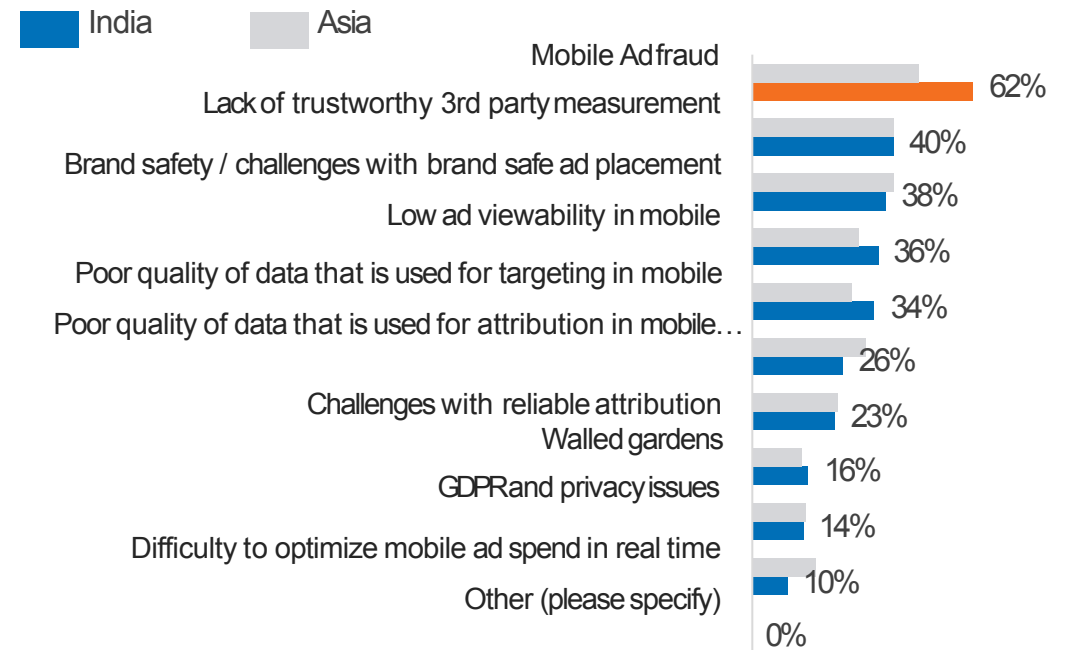
# Mobile Ad Fraud is highly concerned by most Indian firms as the issue will stay the same or magnify in the future

Overall, do you expect mobile ad fraud to increase, stay the same or decrease in 2019?



6/10 believes that mobile fraud will stay the same or increase

Please check the three mobile advertising challenges that are the highest priorities for your company right now?

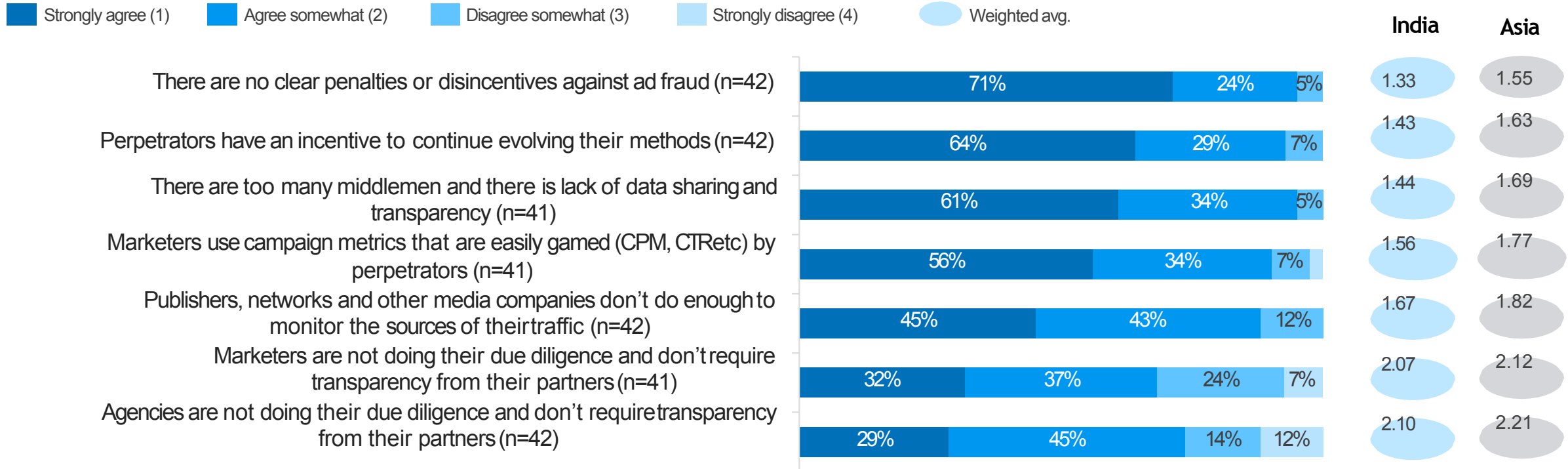


This belief is explained by the high priority that many companies are giving this issue



# Policies to penalise perpetrators is required to combat the issue

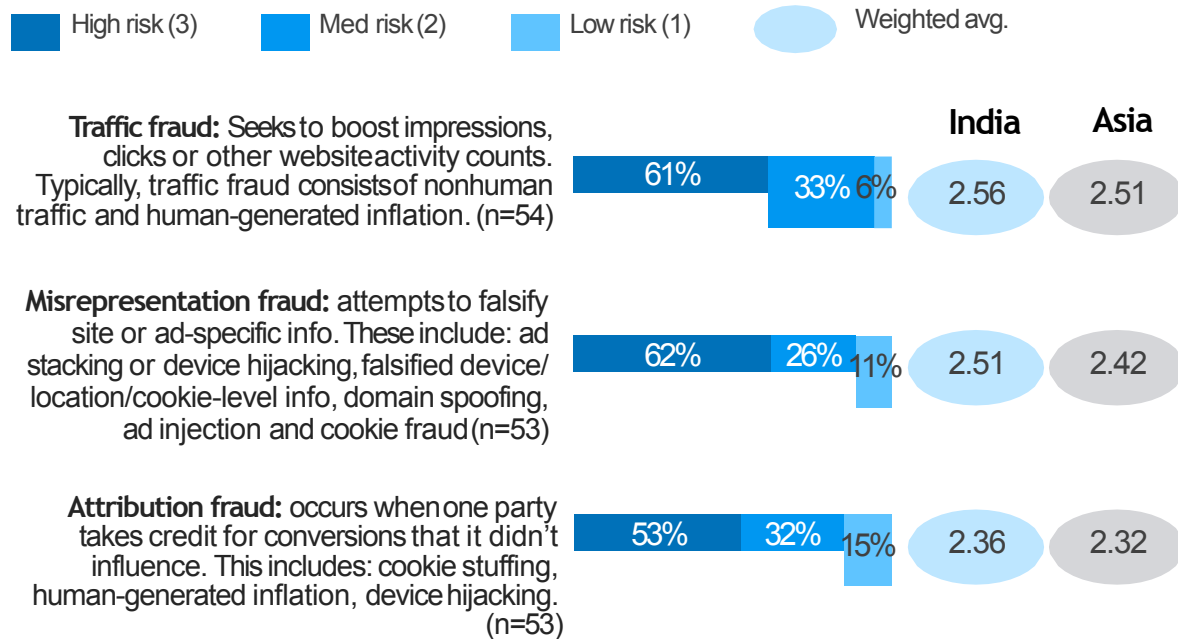
How much do you agree with each of the following statements when it comes to the causes of mobile ad fraud?



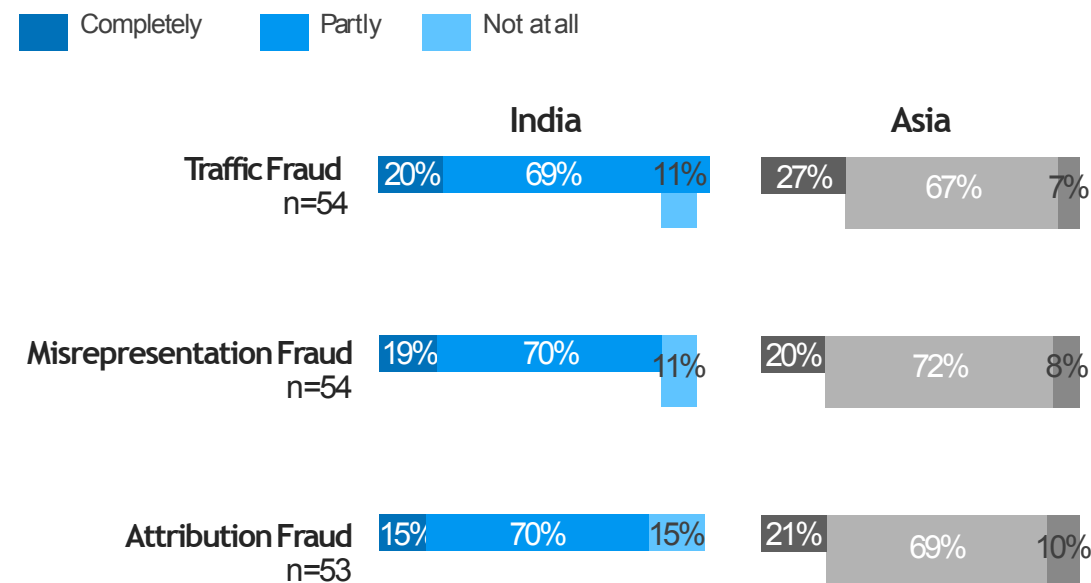
The lack of transparency and a clear system to penalise perpetrators have caused the rise of mobile ad fraud. It's also agreed that perpetrators are benefiting from the fraud hence the evolving method

# Not have been solved completely, all three classes of fraud are regarded as highly unsafe

Please review the following categories of mobile ad fraud. How high is the risk of each of them to your company?



To what extent would you say that you have managed to protect your business from these types of mobile ad fraud through your efforts?



Traffic fraud poses the highest risk, followed by misrepresentation fraud, and then attribution fraud

Very small portions of the ad fraud is believed to be removed completely

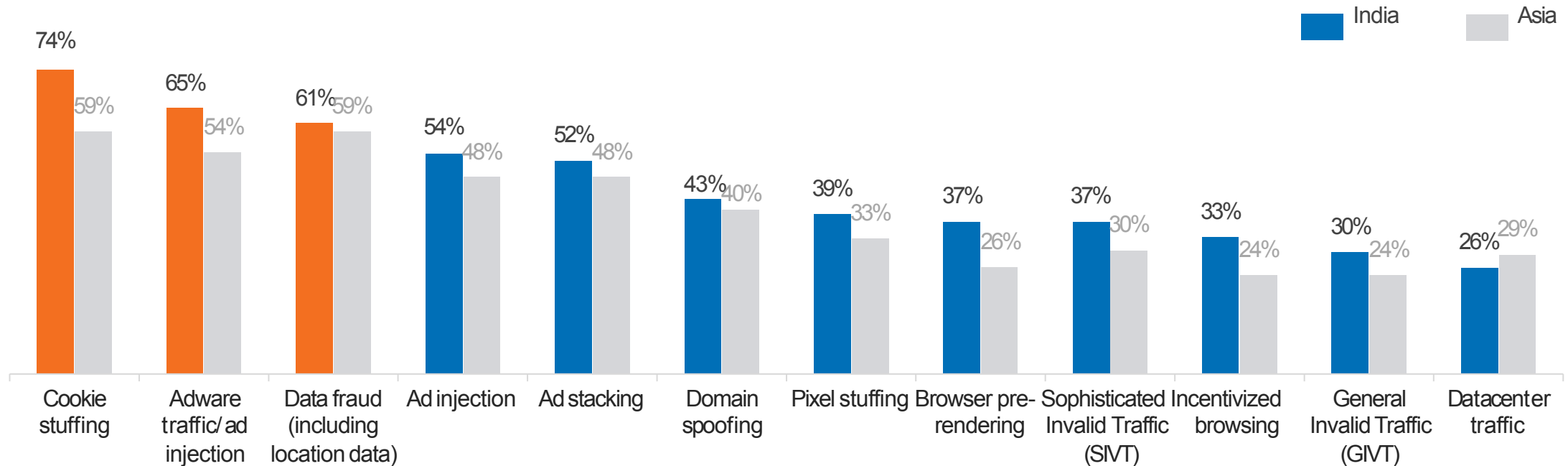




# When it comes to specific fraud methods, cookie stuffing, adware traffic and data fraud are seen as the most dangerous



Here is a list of types of mobile ad fraud that we have heard from other marketers. Which of them do you consider more dangerous to your business? Please check all that apply

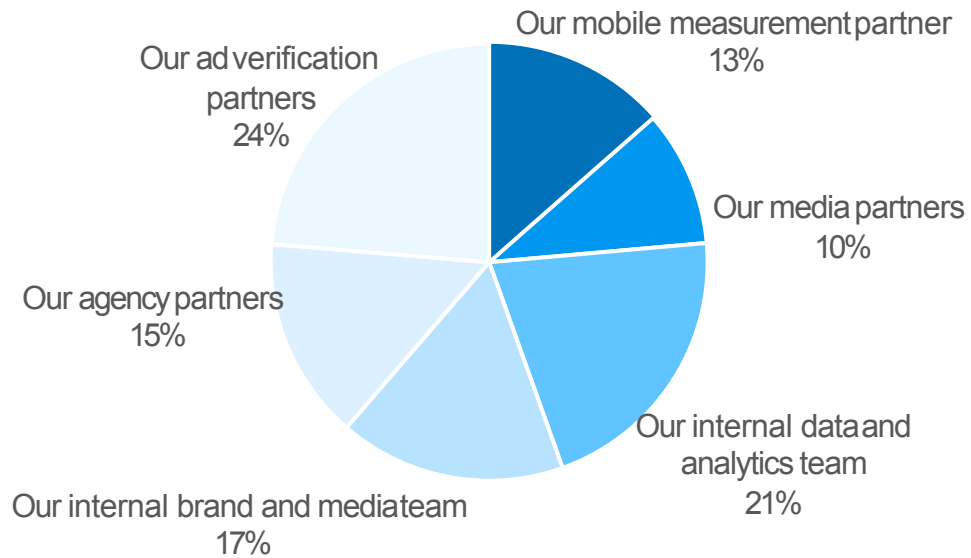


Over half of the respondents consider cookie stuffing, data fraud and adware traffic as highly harmful to their business. Closely followed by ad injection, ad stacking and domain spoofing while browser pre-rendering, incentivised browsing and GIVT are less popular in the list of concerns in India



# More effort is required to combat mobile ad fraud - the most challenging and a growing issue for companies

What is the contribution of each of the following parties, when it comes to helping you reduce ad fraud from your mobile mediaspend?



An equal split between factors that help companies fight against ad fraud

Overall, how would you evaluate the effectiveness of all your efforts when it comes to preventing mobile ad fraud?

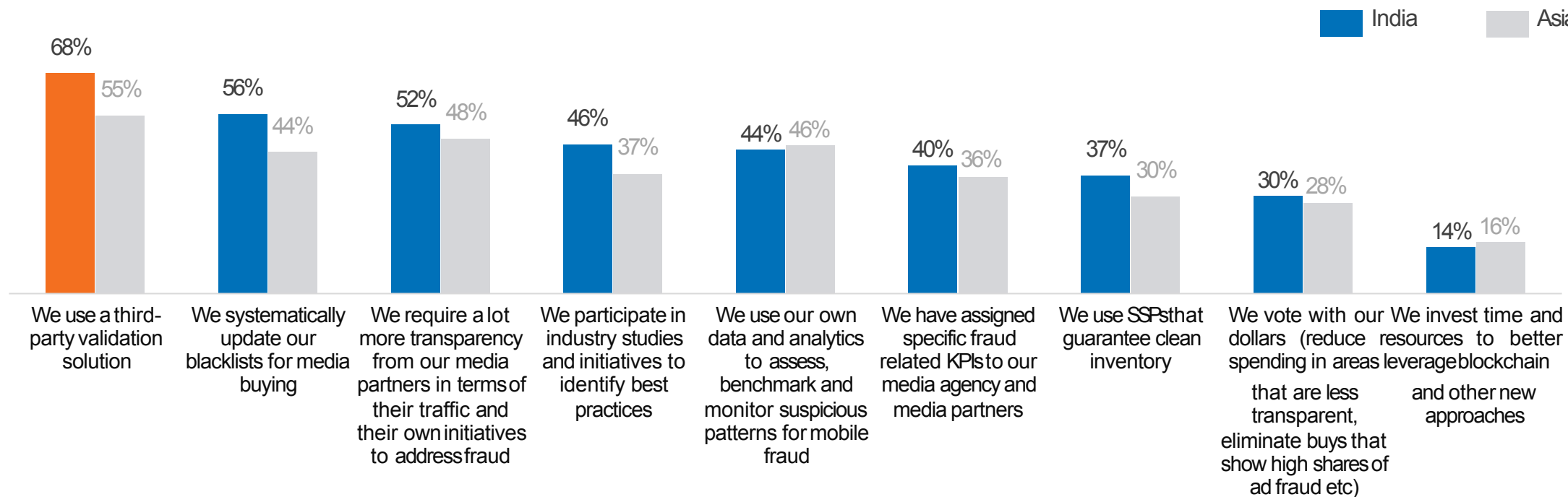


1 in 10 claimed to have completely dealt with the issue while most marketers saw more work to be done



# A combination of measures are in place to address the issue with the most popular choice being an external validation solution

Which of the following measures has your company taken to address mobile ad fraud? Please check all that apply.



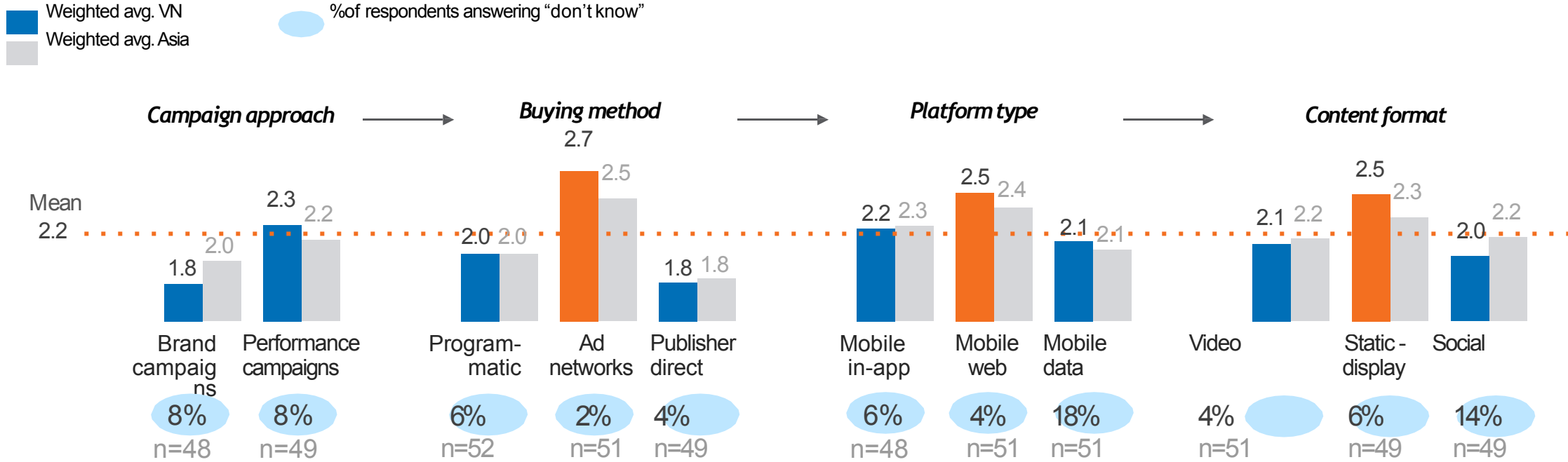
To address ad fraud, companies turned to external forces such as hiring solution vendors and requiring more transparency from their media partners. Not many are exploring new technologies and approaches (eg blockchain)



# Marketers regard buying directly from publishers and programmaticas the safest approach, in contrast to ad networks



In which of the following areas is mobile ad fraud higher, compared to average, based on your experience?<sup>1</sup>



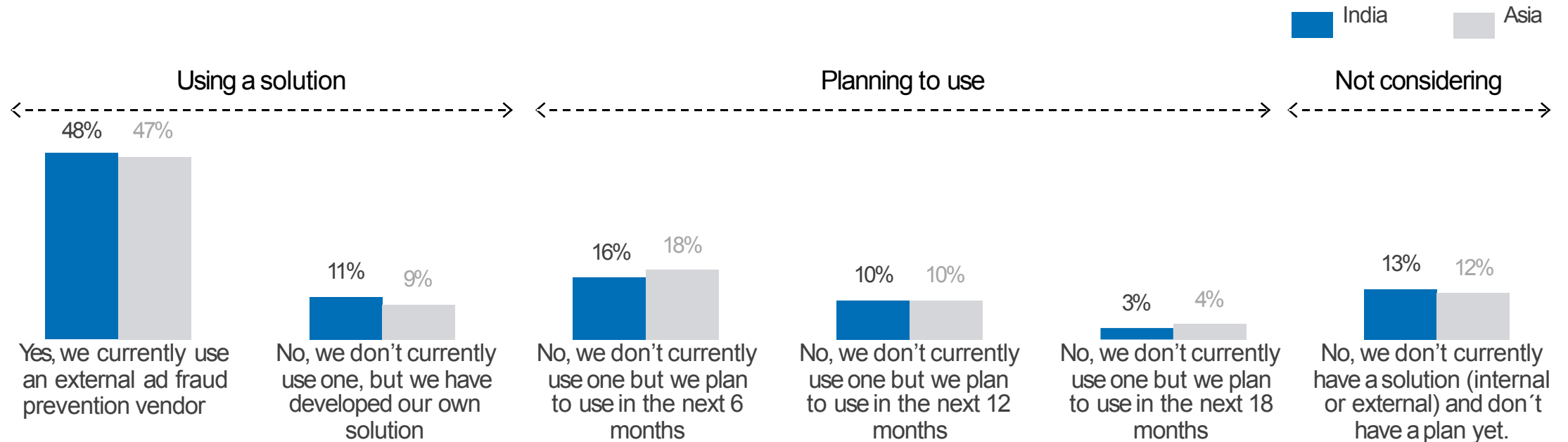
Many are unfamiliar with the risk of fraud in mobile data (including location) and social format. Ad networks, mobile web and static display are considered to be the most risky area



# To help with the fight against ad fraud, 90% of the companies are using a solution or are planning to do so in the near future



Specifically, does your company use now or do you plan to use in the future a dedicated external vendor to help detect, monitor and prevent mobile ad fraud?

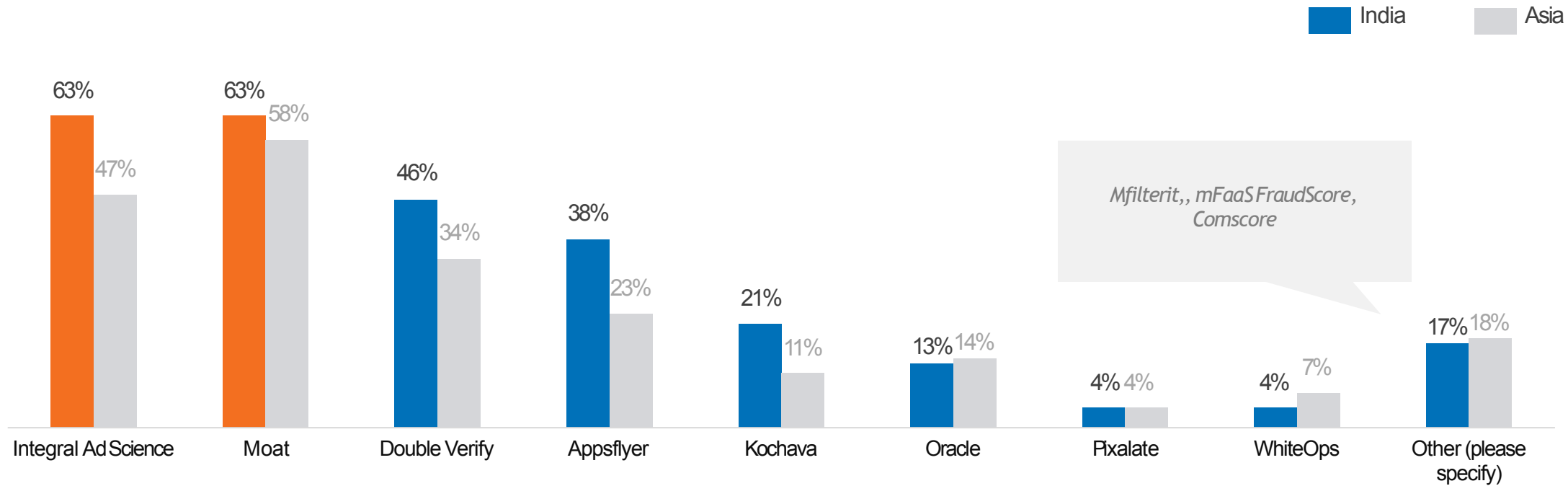


Over half of the respondents are currently using solutions (mainly external) to help combat ad fraud while about a third are planning to do so in the next 6-18months. Only 1 in 10 of the companies are not considering a solution



# MOAT and Integral Ad Science stand out as the most popular providers to detect and prevent fraud in India

Which of the following companies do you work with in terms of detecting and preventing mobile ad fraud? Please check all that apply.

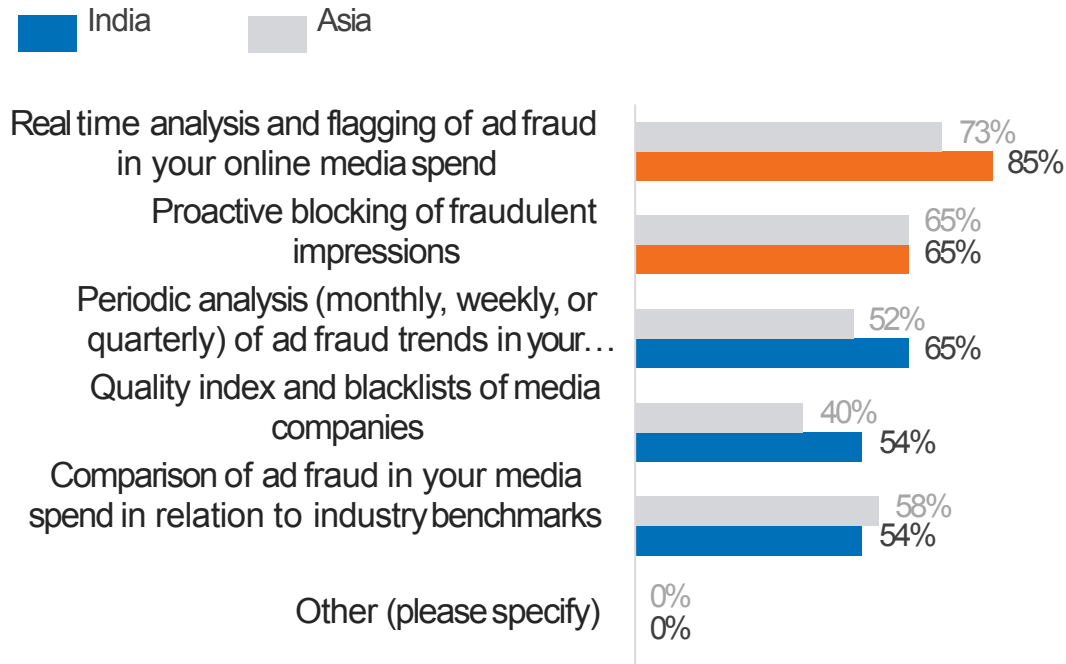


1 in 2 companies use at least one of these four major providers: Integral Ad Science, MOAT, Double Verify and Appsflyer

# Marketers' needs have been addressed accordingly; top priorities include real time analysis and proactive blocking

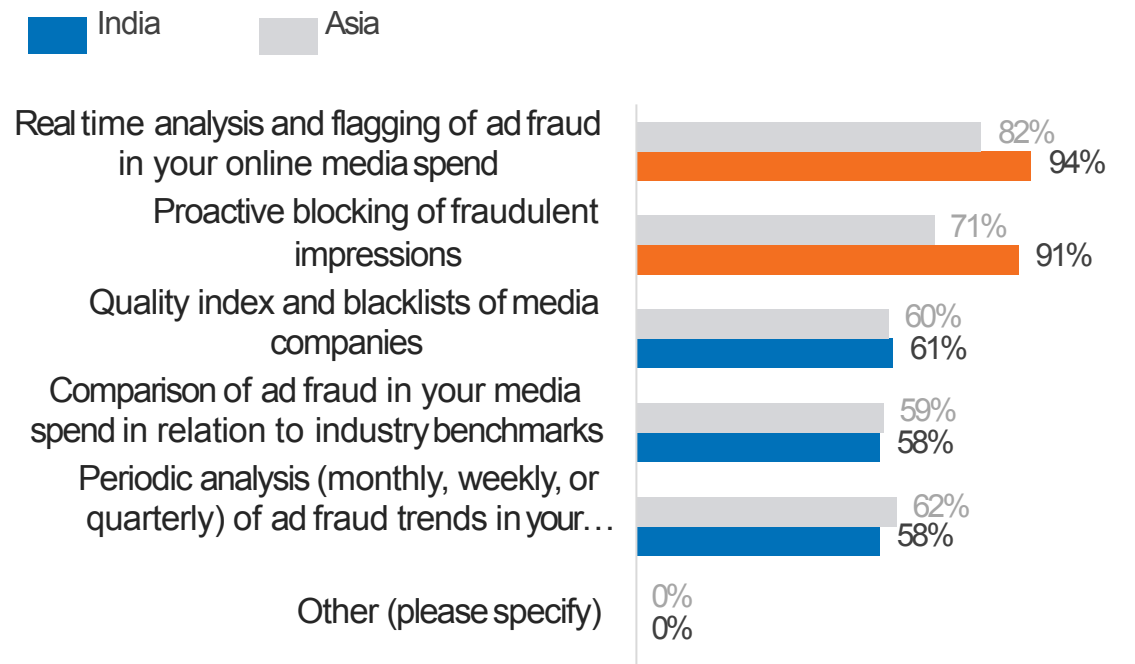


Which of the following services does your anti-ad fraud solution offer to your company? Please check all that apply.



Over 80% are offered instant detection and proactive blocking of potential threads

Which of the following services would you expect from an anti-ad fraud solution? Please check all that apply.



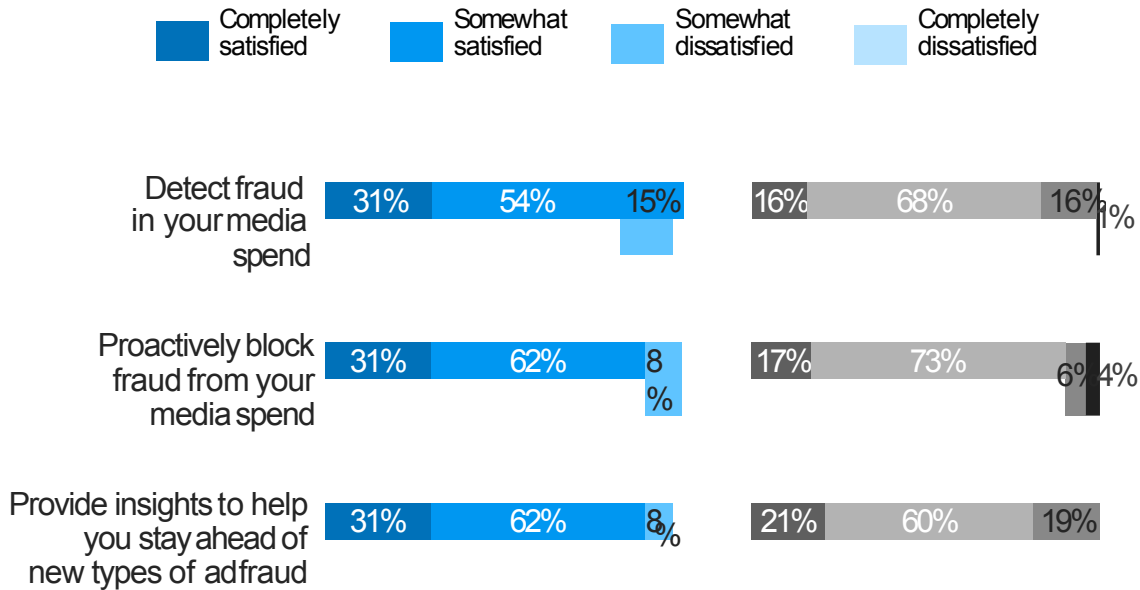
Real time analysis and proactive blocking stood out to be the functions that many companies wish to get



# Despite not having their fraud completely eliminated, Indian companies are mostly satisfied with their current solution, backed by their NPS 27

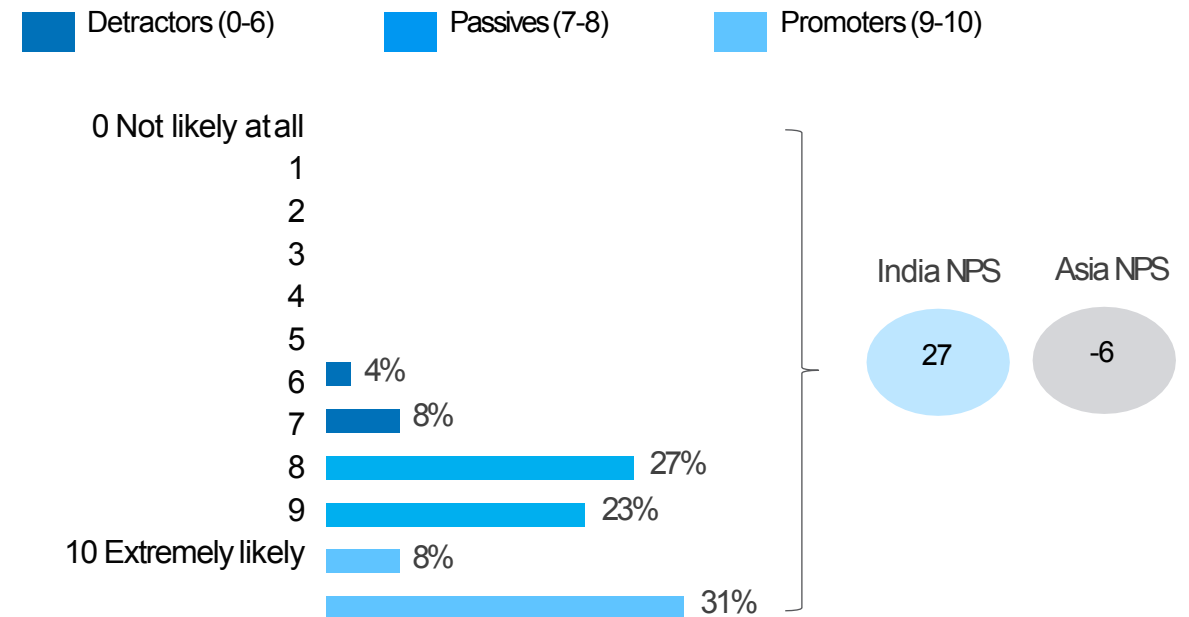


Overall, how satisfied are you of your anti-ad fraud solution in terms of each of the following?



Detecting fraud is the least satisfied aspect of the solution being provided. However, this is not significant

How likely would you recommend your anti-ad fraud vendor to another company? (NPS: Net Promoter Score)



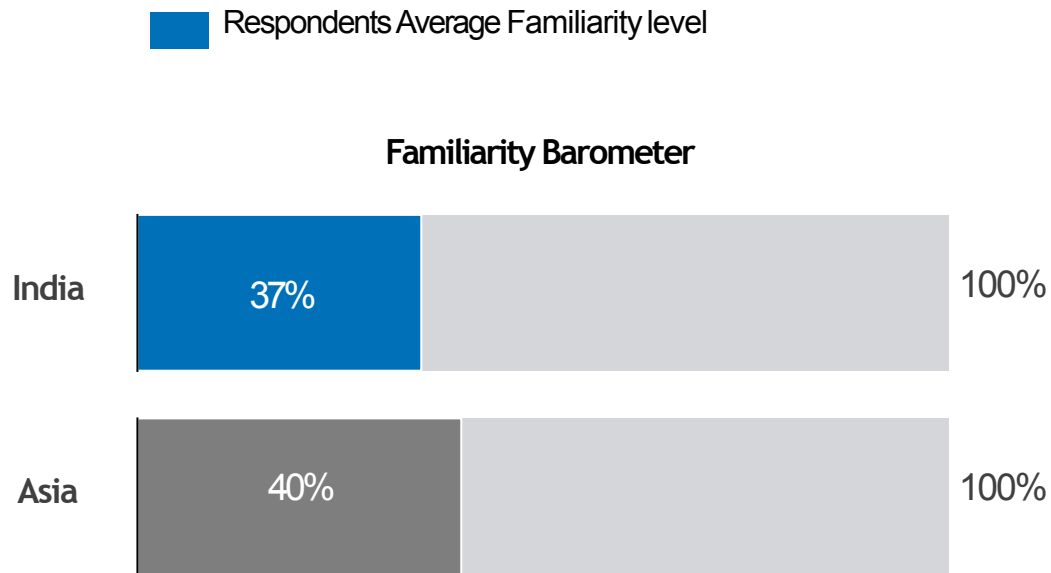
Most users are willing to refer their current solutions





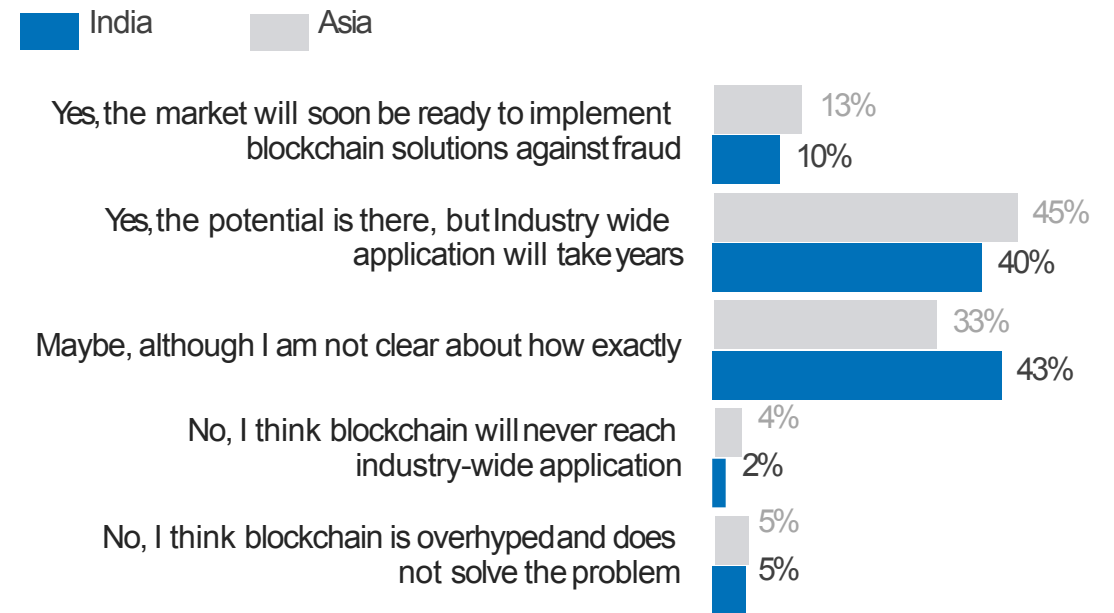
# Despite not being understood fully, blockchain is viewed as a potential technology in fighting against fraud and transparency issues

How familiar are you with blockchain on a scale of 1 to 100?



Around 1 in 4 are familiar with blockchain

Do you think that blockchain technology will help solve the fraud and transparency problem in mobile advertising?



Half of the marketers believe in the blockchain technology in fraud prevention

# Self assessment tools and reports about the mobile ad fraud are considered to be useful for companies to stay ahead of the issue

Here are some ideas for education and tools that other marketers believe that would help their efforts to stay ahead of mobile ad fraud. Which of the following would be valuable to you and your company?



Thank you for being a part of our Mobile Ad Fraud journey.

To continue to be a part of the conversation and participate on the future of Brand Safety, join the global council SAVE

<https://www.mmaglobal.com/save>

In order to know more about Mobile Marketing Association, India click on the link below

<https://www.mmaglobal.com/local-councils/india>