Brand Safety Playbook

A Guide to Defending Brands and Consumers

Contents

Overview

The topic of brand safety is a key issue on everyone's minds.

In the last couple of years, we have been witness to many incidents that have caused brands and consumer to pause and question what they are seeing online and why. Our industry headlines have been littered with stories citing fraud and piracy, untenable ad

> "With all marketers, it is simply a maturation process. I believe every marketer will arrive at the same conclusion that we reached, which is Brand Safety is everything. If marketers get this wrong, everyone loses. Brand Safety is a task which is never over, because it's dynamic and multifaceted. As such, you need to build an infrastructure that ensures that you're able to respond immediately when something new happens. "
>
> —Lou Paskalis, SVP, Enterprise Customer Engagement, and Investment Executive, Bank of America
>
> FROM DEFINING BRAND SAFETY: EXECUTION CHALLENGES, FROM TAG AND BSI

adjacencies, and debates about the proper consumer permissions to activate targeted messaging.

"Brand safety" can hold various meanings to different constituents and their roles in the advertising ecosystem, but generally, the term covers a broad range including fraud, piracy, malware, contextual brand safety occurrences, and issues related to consumer privacy and preferences and appropriate consent. (Some also see viewability, shielding marketers from non-viewable exposures, as a brand safety measure, but this document does not cover the topic in any detail.)

Numerous efforts and initiatives have been created within the industry—crossing advertisers, agencies, platforms and publishers, ad tech, and the industry associations. Each effort addresses a specific area or a range of issues associated with these forms of brand safety. While some specific initiatives have made a huge impact, we as an industry need to support those initiatives that deliver meaningful progress at scale and provide a more comprehensive approach for the industry to undertake

to keep both brands and consumers safe. Brand safety should be regarded as a continuous effort across fraud, piracy, malware, and content adjacencies—at a minimum—to deliver a higher level of advertising assurance in the ecosystem.

Before going further, you might ask, why continuous?

Many forms of fraud and piracy are driven by criminals who use the digital supply chain to trick consumers into interactions that earn those criminals money. Criminals can then use that money to fund illicit activities around the world—many of them violations of human rights and personal safety, if not plainly offensive content: bad for people, and bad for business.

Brand safety is an industry endeavor. Because bad actors will always find ways to game the system, we must all be vigilant in our quest to manage brand safety as stringently as we can. For more information, see The Hunt for 3ve, published by White Ops, about the discovery of a pervasive malware attack.

This Brand Safety Playbook is here to help you know how to reduce your overall risk profile in the digital landscape, saving you precious time on these specific issues and, more importantly, allowing you to focus on executional excellence and building of brand response and brand equity.

This playbook focuses on the steps advertisers and agencies can take from the buy side of business and encourages the sell side of the industry to help close the gap on brand-safety occurrences. Participation by all players in the industry is critical to addressing brand protection at every stage of a campaign. **Together, we are better and stronger.**

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Getting Started

Now that we have set the industry goal for brand safety, let's delve into the steps you can take to increase your goal of brand safety at various points in the digital campaign process. At key points in your campaign activation processes, you can trigger actions to manage brand safety. While there is no panacea, a set of focused activities can help keep you above the fray.

This is why the 4A's has partnered with the **Trustworthy Accountability Group (TAG)**, the **Brand Safety Institute (BSI)**, and the **Interactive Advertising Bureau (IAB)** Tech Lab to bring you this industry playbook on brand safety. Although together, these entities can't solve for all your brand safety needs, each partner provides significant steps for managing brand safety in your campaigns. You will need to add a **Media Rating Council (MRC)** Accredited Ad Verification vendor to your mix of solutions, in addition to the whitelists, blacklists, and other methods and layers of assurance you will use to maximize safety across your campaigns for brands and for consumers.

About Your Brand Safety Playbook Partners

The 4A's and the Advertiser Protection Bureau (APB)

For more than 100 years, the 4A's has addressed the needs of an evolving advertising industry. Today, we work across the industry ecosystem to provide guidance and support to our more than 600 member agencies on myriad issues impacting agencies and the work they do on behalf of their clients and their hard-earned marketing and media budgets.

In the last year, we have seen contextual brand safety issues play out on a very public stage. Marketer ads have appeared adjacent to content and videos featuring terrorism, suicides, gang violence, sexually explicit content, and racist opinion and comments: completely inappropriate for any advertiser.

The time and effort invested in detecting, reporting, addressing, and preventing these types of adjacencies is enormous, distracting from the core remit of brand messaging and building. Several studies over the last year indicate that nearly 70% of consumers respond negatively to brands when they appear next to questionable content, driving down the brands' likability and intent (as shown in the Hearts & Science chart below). Some consumers believe brands have made the conscious choice to be adjacent to inappropriate content, suggest-
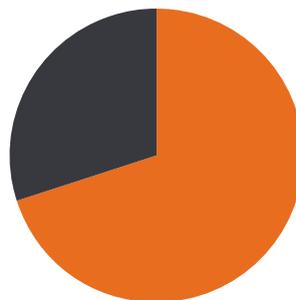

When ads appear next to offensive, hateful, or deragotary content:

OMG Rise, *The Unreachables Study*, Q3 2017, published by Hearts & Science

64% say the brand risks tarnishing its reputation

70% will not like, recommend, or purchase the brand if it appears around such content

ing a misperception that these adjacencies are in line with brand and company values. Not good for brands, and not good for people. (For additional perspective, see the Edelman Trust Barometer or Magna/IPG MediaLab/Cheq's study The Brand Safety Effect.)

This is why the 4A's created the Advertiser Protection Bureau (APB). This idea surfaced in 2018 at our industry brand-safety discussion, The Advertising Assurance Forum, when one member said, "When I'm doing brand-safety checks for my brands, I see other brands that I know shouldn't be there too. Is there a way I can pick up a phone or send an email to tell the other agency to get their brands out of there?" The APB was born in this moment.

Since then, the APB has been sharing brand-safety issues to get its clients away from unsafe content and meeting with sellers of media and technology companies that aspire to address various brand safety issues. In the summer of 2018, the APB decided to partner with the MRC to draft the Supplemental Guidance on Content Level Context and Brand Safety Ad Verification. This guidance was meant to set a brand safety floor for the industry and raise the brand safety standards on content-level adjacencies.

Starting with IAB Tech Lab's Content Taxonomy, the APB and the MRC quickly fixed upon the dozen commonly agreed-upon high-caution areas for content. This group quickly outlined what editorial treatment of content in these buckets constituted

adjacencies that are never appropriate for advertisers (while acknowledging that in some cases, based on the treatment and/or delivery context of the content, such as a news story or documentary, risky content could be appropriate to a brand and its values).

This outline led to the development of the Brand Suitability Framework, applying perceived levels of risk in the treatment of content within the dozen content categories. In lieu of specific digital buying guidelines, agencies can use this framework as a tool to work with advertisers and publishers/platforms to discuss which content may or may not be right for any brand, by category. Each publisher/platform does not conform directly to this framework, but most have ways to align to the intent of the document.

This is a big step forward in getting the industry on the same page—and it's a start for better contextual brand safety. Our perspectives and capabilities will grow over time.

The APB views these frameworks as living documents that can be revisited and refined over time. Moving forward, the APB will continue to work with the industry at large to make sure there are appropriate approaches for advertiser-friendly monetization on content across the web.

You can find the Brand Safety Floor and the Brand Suitability Framework here.

Trustworthy Accountability Group

> *The 4As and the APB have demonstrated great leadership in developing this playbook.*
>
> *It provides clear, implementable steps for agencies to help protect their clients, such as leveraging TAG's anti-fraud certification program. And as an industry resource, it goes much further in helping to engage and educate everyone from marketers across to publishers. I look forward to putting these words to action as we come together to advance the cause of brand safety.*
>
> —Mike Zaneis, President & CEO of TAG

The Trustworthy Accountability Group (TAG) is the leading global certification program fighting criminal activity and increasing trust in the digital advertising industry. Created in 2014 by the industry's top trade organizations, including the 4As, Association of National Advertisers (ANA) and IAB, TAG is a cross-industry self-regulatory program. Its mission is to

- eliminate fraudulent traffic
- combat malware
- prevent internet piracy
- promote greater transparency in digital advertising.

TAG advances those initiatives by bringing together companies across the digital advertising supply chain to set the highest standards. TAG is also the first and only registered Information Sharing and Analysis Organization (ISAO) for the digital advertising industry.

TAG's programs are proven to increase brand safety. Research conducted by the 614 Group measuring the effectiveness of TAG's Certified Against Fraud Program found that the use of TAG Certified distribution channels for digital advertising reduced the level of fraud in the U.S. to 1.48%, an 83% reduction over industry averages. Use of TAG Certified channels in European markets has also been shown to reduce fraud rates to 0.53%, from an industry average of 8.99%: a 94.1% reduction. A study measuring the effect of TAG's Certified Against Piracy Program and performed by EY found that anti-piracy steps taken by the digital advertising industry have reduced ad revenue for sites that promote brand and content piracy by between 48% and 61%. (Find the TAG Fraud Benchmark Study here.)

Most recently, TAG has been partnering with the Brand Safety Institute (BSI) to release a series of joint white papers to define, quantify, and highlight opportunities and challenges around brand safety. The BSI was founded in 2018 to support education on and the practice of brand safety in the digital advertising supply chain. Through a program of research, education, and certification, the BSI offers knowledge, tools, best practices, and a community of peers to the individuals charged with championing the cause of brand safety.

The Brand Safety Institute

The Brand Safety Institute is a digital advertising industry initiative to professionalize the work of brand protection. Through its research, education, and certification programs, the BSI gives ad industry executives the expertise and skills they need to minimize brand risks and capitalize on brand opportunities in the digital advertising supply chain. Through its Brand Safety Officer certification program, the BSI helps leaders set the highest standards for brand protection, learn new and emerging best practices, and build an industry-wide community of brand safety peers.

For more information on TAG, please visit tagtoday.net.

For more information on BSI, please visit brandsafetyinstitute.com.

IAB Tech Lab

The IAB Technology Laboratory (Tech Lab) was established in 2014 as an independent non-profit organization, taking on oversight of technical standards previously developed within IAB (U.S.). Since then, Tech Lab has been engaging a member community globally to develop a growing and increasingly valuable portfolio of foundational technology and standards that enable growth and trust in the digital media ecosystem.

Comprised of digital publishers, ad technology firms, agencies, marketers, and other member companies, Tech Lab focuses on improving the digital advertising supply chain, measurement, and consumer experiences, while promoting responsible use of data. Its work includes the OpenRTB real-time bidding protocol, ads.txt anti-fraud specification, Open Measurement SDK for viewability and verification, VAST video specification, and DigiTrust identity service.

Tech Lab Board member companies are represented from across the digital supply chain.

IAB Tech Lab is headquartered in New York City with staff in San Francisco, Seattle, and London. Learn more at iabtechlab.com.

> "
> *It was important for us to contribute to this Playbook, given the central role of agencies in ensuring brand safety for their clients.*
>
> *There are real tools available now to help buyers, including several in Tech Lab's portfolio: ads.txt for sourcing authentic supply, taxonomies to match or avoid content and advertised products, Data Label for insight into audience data, and Open Measurement for verification. The Playbook highlights these and other practical ways for agencies to meet their clients' brand safety needs today.* "
>
> —Dennis Buchheim,
> SVP and GM
> of IAB Tech Lab

IAB Tech Lab: Guiding Themes

Brand & Media Growth		
Ad Fraud and Brand Safety	Identity, Data & Consumer Privacy	Ad Experiences & Measurement
Programmatic Efficiency & Transparency		

• Transparent, safe, effective supply chain

• Scalable & more consistent measurement

• Higher-quality consumer advertising experiences

…all supported by responsible use of data

The Playbook: How to Address Core Brand Safety Issues

Now that you know more about the 4A's/APB, TAG/BSI, and IAB Tech Lab, let's take a closer look at how we complement each other and provide a baseline level of brand safety in your campaign logistics.

Together we offer a solid and strong start into the safe deployment of digital advertising across the range of planning/buying to implementation to optimization and replanning. As we consider how to use each of the brand-safe approaches developed by these organizations, we think it most useful to set them within the context of the life of a campaign.

DEFINING BRAND SAFETY REPORT

How to Systematically Address Brand Safety

1. Establish Brand Safety and Suitability Profile

a. Have a clear sense of communication goals (i.e., reach and frequency/effective frequency dynamics necessary to drive campaign KPIs)

b. Commit to the Brand Safety Floor

- See MRC-supported APB Brand Safety Floor for Content here

c. Determine Brand Suitability Guidelines

- Consider campaign and brand goals to factor risk vs. scale when establishing these guidelines and determine appetite for risk to determine suitability guidelines

  - Use the APB Brand Suitability Framework as a tool for assessing risk tolerance for content—agencies, advertisers, and publishers/platforms (and ad verification partners, where appropriate) should complete an exercise to determine appropriate content settings

  - It can also be helpful to know the IAB Tech Lab Content Taxonomy and use tools to assess safety and relevance of contextual categories

d. Draft Buy Guidelines inclusive of brand safety and suitability decisions

- Provide all publishers and campaign partners with a clear outline of brand safety and suitability guidelines for every media plan

e. Identify an internal point person for brand safety issues, and consider appointing a Brand Safety Officer to oversee such activities

- Brand Safety Officers can be officially certified by the BSI to ensure they have appropriate training and are part of the broader brand safety community

f. Determine your **Brand Safety Response Process**

- How will you notify agency team members?

- Who will reach out to the media owners?

- Which details (scope/scale) do you need to communicate incidents to clients and brand response (i.e., stop, pause, continue with caution)?

- How are media owners/suppliers re-evaluated moving forward?

- What are the follow-ups required internally, with clients and media owners?

- What preventative measures need to be addressed, upgraded, or tightened?

2. Implementation—Structuring Buys and Terms

a. Know whether your partners are TAG Certified, and where possible, prioritize TAG Certified Channels for placing buys

b. Be familiar with consumer consent/privacy requirements (e.g., General Data Protection Regulation, CCPA) that apply to you and all of your vendors and suppliers, and take advantage of relevant tools and frameworks, such as the Transparency & Consent Framework and The GDPR: What United States Agencies Need to Know

c. Ensure payment terms established with every vendor include specifics regarding payment (or non-payment) for identified brand safety violations and brand suitability guidelines (as well as fraud, viewability, etc.)

d. Include terms surrounding use of fourth-party ad verification tags (the leading ad verification vendors: DoubleVerify, Integral Ad Science, and Oracle Data Cloud) for identification of violations,

as well as specifics surrounding blocked impressions vs. flagged impressions

e. Identify requirements for placement of fourth-party technology tags and terms for non-compliance (tagging hierarchy)

f. For programmatic buys, establish buy to adhere to brand safety settings:

- Use DSP plug-ins or settings, and be cognizant of IAB Tech Lab Content Taxonomy in Open RTB requests, including the URL of the page where the impression occurred (for browser content)

- Use ads.txt (browser-based inventory) and app-ads.txt (mobile app inventory) to select and prioritize authorized sellers in the ecosystem

- Manage inclusion (i.e., white lists and exclusion lists) accordingly. Remember to review and update blacklists constantly. Be consistent with your content taxonomy

- When accessing data as part of your buys, prioritize reviewed data sources at www.datalabel.org that are consistent with the IAB Tech Lab Audience Taxonomy and come with verified data definitions and statistics

3. Managing Accountability

a. Select an MRC Accredited ad verification vendor to track and govern brand safety, invalid traffic, viewability, etc.

b. Apply brand safety settings within fourth-party technology. Create pre-bid filters and post-bid blocking protocols
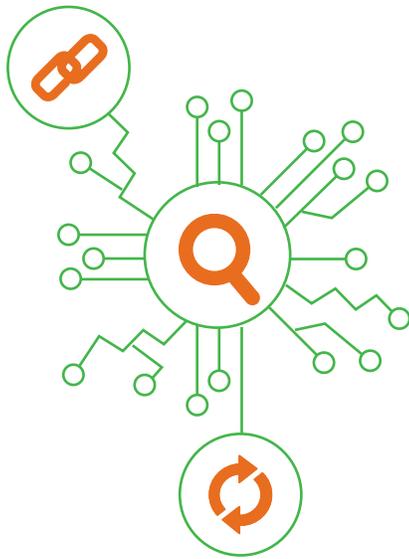
c. Understand verification technology acceptance by publishers

- Identify publishers, site sections, formats, or apps that will be able or unable to run verification technology as part of the planning process. As you can only manage risk where you can measure it, note:

  - mobile in-app (open measurement SDK streamlines viewability and other measurement across apps and verification vendors)

  - VAST 4.1 is the current video standard, but VPAID and older versions of VAST are still being used. Push publishers and vendors to upgrade to take advantage of important new capabilities that will benefit your campaigns

d. Measurement and validation

- Check reporting to ensure you're receiving data as expected

- Identify and assess violations

- Alert publishers and partners to violations (or provide access to reporting) and resolve

- Ensure partners deliver make-goods for unapproved violations

- Adjust buy accordingly

e. Enforce payment terms

- Ensure that violations have been flagged and adjusted so billing matches payment terms

4. Evaluating, Optimizing, and Replanning

a. Adjusting Programmatic buys

- Adjust settings or inclusion/exclusion lists according to flagged media violations

b. Considerations when replanning:

- History of repeated violations, difficult-to-manage sites and suppliers, detected unsafe or unsuitable content

- Low acceptance of verification technology

- Issues resolving payment for violations

- TAG Certification status

- Reassess brand suitability

- Identify potential impacts to performance, reach, and ROI through suitability structure, as well as historic issues, to determine if guidelines should be adjusted

5. Ongoing Brand Safety Activities

a. Reassessment of brand suitability parameters as needed

b. Staying current on technology versioning (VAST 4.1, which succeeds VPAID and VAST 2.0, 3.0, and 4.0)

c. TAG Compliance Officer training

d. Brand Safety Institute participation

e. Prioritize accredited or certified channels/providers/protocols

Brand Safety into the Future

Congratulations! You are well on your way to effectively managing a great deal within the realm of brand safety.

While the steps outlined above go a long way in protecting both brands and consumers, you should know that your work is never done. Always look for new technologies and processes that can improve upon what you are doing today.

As mentioned at the top of this playbook, the bad actors who create the tension in the ecosystem will never rest—and that means we cannot either. As new technologies emerge, and new barriers are levied, they will be sure to seek ways around our defenses.

As the advertising industry, we must remain vigilant and continue to be creative in closing off access to inventory and campaigns to protect the reputation of our brands and the safety of the very consumers we touch day in and day out. For all the resources laid out in this document, know that there will be constant updates, new protocols, and better versions of all the tools over time—you must stay up to date.

Together, we can beat bad actors at their game, ensuring that our brands thrive in the digital ecosystem, and our consumers experience the internet the way we always intended them to. By following this playbook and staying up to date, we can deliver a better consumer experience. Good for brands, and good for consumers! **Good luck!**

Podcast

Learn more about the fight against ad fraud with a 4A's podcast: "Ad Assurance, The Next Chapter: Understanding Fraud," recorded at 4A's Decisions 20/20 conference in March 2019, moderated by Louis Jones and featuring Michael Tiffany, co-founder and president of White Ops, and Abrahim Farraj, manager of creative content protection at NBC Universal. **Stream or download the episode here.**

Appendix:
Sources and References

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