

The logo for the Interactive Advertising Bureau (iab.) is displayed in a bold, white, lowercase sans-serif font. The letters are closely spaced, and the period at the end is a solid white dot. The background is a solid red color with several large, semi-transparent, overlapping circles of varying shades of red, creating a layered, abstract effect.

Understanding Brand Safety & Brand Suitability in a Contemporary Media Landscape

The Best Practices Guide to Concepts, Definitions, Tools, and
Transactional Applications

December 2020

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PART 1:

**Defining the Basics and the
Toolkit for Success**

Introduction

2020 has been the year of the unexpected. From a pandemic and quarantine to economic crisis to a resurgent civil rights movement and the most polarized our nation has been since the Civil War, this chaotic time impacts business decisions at every level, including advertising.

In the face of this chaos, each individual advertiser needed to become shrewd about how to run campaigns suitable to its brand identity during a historic moment when a large amount of publisher content is focused on hard news such as the growing death tolls due to coronavirus, #BlackLivesMatter, and protests that might turn violent.

At the same time, issues of **Brand Safety** have begun to evolve beyond avoidance of malware, spam, and adult content, to include larger and more difficult-to-pin-down considerations of **Brand Suitability**.

Brand Suitability refers to specific targeting parameters unique to each brand, as determined by its values. For some brands, an ad placed outside a specific targeting parameter might lead to a brand safety incident with potential negative consequences that extend beyond reputational damage.

To address and educate the media industry, IAB's Programmatic+Data Center convened a working group of the leading ad verification and ad tech companies, as well as media agencies, to develop best practices based on what we learned during this unprecedented year. What follows is an educational guide focused on the shape and extent of both Brand Safety and Brand Suitability, and why they are important to advertisers. This paper outlines key concepts, available tools, and how to use them in order to help marketers make informed decisions and execute efficient and effective programmatic plans.

The working group developed this guide for advertisers, agencies, and publishing professionals who want more information on delivering ads to the right consumer in environments that always protect brand identity.

Note: Although we have made every effort to ensure the accuracy of the material in this guide, it should not be treated as (and does not constitute) legal advice, nor should it be used as the basis for formulating legal or business decisions without consulting professional advice. We make no representations or warranties, expressed or implied, as to the completeness, correctness, or utility of the information in the guide, and IAB assumes no liability of any kind resulting from the use or reliance upon its content.

Executive Summary

Brand Safety and Brand Suitability are ever-evolving and impact all advertisers concerned with preserving their brand reputations within the digital advertising ecosystem. Industry organizations have published resources and reference materials, such as the *Brand Safety Floor* and *Brand Suitability Framework* documents developed in a consortium led by the 4As (American Association of Advertising Agencies).

Building on this earlier work, the IAB's Brand Safety & Brand Suitability Working Group focuses on educating the industry about ways to protect online advertisers through the proper application of tools and strategy.

Brand Safety is well documented in terms of content categories. The "floor" is an industry baseline for brand safety. Therefore, IAB's decision to focus on Brand Suitability, especially when considering the events of 2020, is in response to changing dynamics within advertiser comfort levels across a multitude of content areas. These areas include the appropriateness of supporting news content and publishers' need to cover relevant content for public safety. These issues have amplified industry attention to Brand Suitability, therefore igniting the need for this guide.

Brand Safety & Brand Suitability: Relevant Groups

There are already a number of business groups actively contributing to the Brand Safety & Brand Suitability conversation:

- **Trustworthy Accountability Group:** [TAG](#) is the leading global certification program fighting criminal activity in order to increase trust in digital advertising. TAG recently acquired [JICWEBS](#), which has a brand safety certification program.
- The 4A's **Advertiser Protection Bureau** ([APB](#)) is a group formed to enable agencies to share the collective responsibility of achieving Advertising Assurance, which is how the association defines its efforts to create environments where brands and consumers can coexist with trust.
- The World Federation of Advertisers (WFA)'s **Global Alliance for Responsible Media** ([GARM](#)) initiative: This collective brings together advertisers, agencies, media companies, platforms, and industry organizations to improve digital safety.
- **Media Ratings Council** ([MRC](#)) has a number of auditing programs for measurement as well as for brand safety.
- **IAB Tech Lab** focuses on ad tech standards, including those intended to support brand safety capabilities in a consistent and common manner; Tech Lab partners with other industry organizations to enable their efforts in standards.

Summary of industry activities:

TAG defines “Brand Safety” as the controls that companies in the digital advertising supply chain use to protect brands against negative impacts on consumer opinion associated with specific types of content and/or related loss of return on investment.

It is important to note, as the definition of Brand Safety has evolved a distinction between Brand Safety and Brand Suitability has come into focus. The 4A's Advertiser Protection Bureau (APB) released a framework that outlines a category taxonomy for the avoidance of content at multiple risk levels—a brand *safety* floor that describes content against which no ads should ever be served. On the other hand, brand *suitability* levels describe three levels of risk (high, medium and low) for content that may not be appropriate for certain brands. GARM has recently partnered with the APB and other industry organizations and companies, to [release an updated version](#) of the Brand Safety Floor and Brand Suitability framework. This framework is included in the IAB Tech Lab's upcoming version (2.2) of the [Content Taxonomy](#).

Defining Brand Safety

Brand Safety solutions enable a brand to avoid content that is generally considered to be inappropriate for any advertising, and unfit for publisher monetization regardless of the advertisement or brand. This is where the 4A's Brand Safety Floor categorization and IAB's taxonomy classifications come into play.

For example, **content** that contains hate speech directed at a protected class would be inappropriate for any advertising. Likewise, content that promotes or glamorizes the consumption of illegal drugs would be inappropriate for any advertising.

Defining Brand Suitability

Brand Suitability solutions enable a brand to determine content for an individual advertiser's goals. Brand Suitability solutions can either:

- a) help a brand to **avoid** content that is specifically inappropriate for its unique sensitivities and values but may be appropriate for another brand, or
- a) allow content that is **aligned** with a brand based on its context, sentiment, tone, creative messaging, and other qualifying factors.

Here is a general example to explain the nuances of brand suitability applied to the alcohol category.

Alcohol as a content topic can be discussed in a variety of ways that may or may not appeal to all advertisers. An article entitled "*Top 5 Drinks that Smash You Surprisingly Fast*" may present a higher level of risk to some advertisers, whereas another article entitled "*Best Wines to Pair with Your Thanksgiving Turkey*" may not. Brand suitability evaluates these articles based on a brand's predetermined settings.

Coronavirus and Brand Suitability: A Case Study

As news of increasing Coronavirus infection levels dominated Italian media in February 2020, Vodafone Italia, a leading telecom brand, experienced a 3x increase in its block rate, based on existing brand suitability settings. Vodafone Italia collaborated with its ad verification partner to reevaluate the brand's keyword settings, layering on semantic analysis to distinguish between negative, positive, and neutral Coronavirus content, and adding specific home pages and site sections to its page-level exceptions list. This broadened inventory availability on these high-traffic gateway pages. This strategy helped Vodafone Italia expand its campaign reach while maintaining brand protections.

As a result of implementing the recommended strategies, Vodafone Italia saw a significant increase in campaign scale. Daily blocked impressions immediately declined by 49% and quickly returned to Vodafone's Block Rate benchmark. Also, campaign performance increased materially in the week after implementing solutions— seeing increased sales and a 26% reduction in Cost Per Acquisition (CPA).

This example reinforces the need for brands and agencies to engage continuously with ad verification partners to adapt campaigns proactively to evolving news cycles.

Defining Brand Compliance

Brand Compliance is distinct from Brand Safety and Brand Suitability. Brand Compliance solutions allow brands to ensure that they follow any regulatory guidelines present due to the nature of their product. For these brands, mistakes carry direct costs in the form of potential fines and other punishments.

Examples include geo-restrictions based on local laws restricting advertising (e.g., cannabis, gambling, etc.), site restrictions based on age (e.g., alcohol, cannabis, adult content, etc.), and content adjacency issues (e.g., the limited ability for political or government ads to run on certain websites).

Brand Safety, Brand Suitability, and Brand Compliance infractions have real-life business consequences for advertisers including advertisers' media investment. Consumers associate brands with the content they appear near as an implied endorsement of that content. A negative implied endorsement can have long-term impacts on brand equity for years to come. It is much easier to safeguard a brand's marketplace position in advance, when the brand has more influence, than having to rebuild that position tomorrow.

Sample of industry issues:

- **Media investment:** *Brand Safety issues are a leading factor, 32%, preventing U.S. and UK Marketers from shifting more budget to in-app ads.*¹
- **Customer response:** *According to U.S. media professionals, "Hostility expressed by consumers" was cited as the leading outcome that their company has experienced as a result of negative brand suitability issues followed by lost revenue (44.1%), reduced brand equity (42.4%), and negative publicity (20.3%).*²
- **Adjacency:** *The majority of U.S. consumers (81%) find it annoying when a brand appears next to low-quality content. Of those consumers, 52% feel less favorably toward a brand that does this. The most concerning issue though is the discovery that 62% will stop using the brand altogether if its ads appear adjacent to low-quality content.*³
- **Consumers are open to ads, but suitability is critical:** *Overall, 44% of consumers are trying new brands after seeing a relevant ad. Younger consumers prefer ads on social media, while older groups indicate a preference for TV.*⁴
- **Navigating news cycles and the risk of fake news requires nuance:**
 - *55% of consumers are less likely to purchase from a brand that advertised alongside fake news;*
 - *67% are more likely to look at an ad if it appears on a trusted news site.*⁴

This echoes previous research conducted by DoubleVerify and The Harris Poll that states that while online advertising is useful to most consumers today (61%), an overwhelming majority (82%) say it is important that a brand's ads appear next to content that is safe, accurate, and trustworthy.

- **The future requires a contextual approach:** *Over two thirds (69%) of consumers are more likely to look at an ad that is relevant to the content they are viewing, and 67% are open to viewing relevant ads from new brands in such an environment.*⁴

Source

¹ Fyber, "2019 State of In-App Advertising and Monetization (eMarketer)

² Integral Ad Science (IAS) "The State of Brand Suitability" in partnership with Digiday, October 2019.

³ Integral Ad Science (IAS) "[The Ripple Effect](#)", November 2019

⁴ DoubleVerify/Sapio Report, September 2020: 'Four Fundamental Shifts in Advertising During 2020'

Best Practices: Strategies & Tools

Brand Suitability Strategy

After determining your brand equity and values, it's important to remember that brand suitability is unique to each brand and situation (news event, content, or publisher). What may increase scale and consumer visibility for one brand could be damaging to another. A brand suitability strategy is therefore incremental to the brand safety strategy based on its bespoke needs, the relationship to its publishing placements, and its consumer-facing engagement.

Take, for example, the difference between a cosmetics company and a family-focused brand. While a cosmetics company might want to run against mature content and dating advice in a fashion magazine, this likely would not be the ideal environment for a CPG brand promoting family-focused dinner tips.

Moreover, brand suitability is not static. While it's important to have a general approach to suitability, emerging events or news cycles should be assessed independently and often in order to ensure on an ongoing basis that a brand's policy is in line with factors that may impact how and where it wants to appear online.

Advertising in News: It is recommended to reassess brand suitability strategies at the onset of developing news stories to establish best practices for your brand. Supporting news as a medium is crucial to long-term publisher success and can require attention to maintain overall goals while not sacrificing publisher advertiser support. IAB reports in a study published in [October 2020](#), that news content is brand safe and improves consumer trust—84% of consumers indicate trust remains neutral or increases for news advertisers as a result of their advertising presence.

Brand Suitability Toolkit

To preserve scale while protecting your brand, there are several tools advertisers can use that span everything from pre-bid avoidance, to campaign monitoring and blocking, to post-campaign analysis. A successful brand suitability strategy will increase precision to add scale while ensuring protection and maintaining advertiser protections for the brand specific goals.

What follows suggests universal guidance to media decision-makers. Keep in mind there are many nuances available in the marketplace.

Inclusion and Exclusion Lists at the Root Domain, Full URL, and App-ID Level

Inclusion and exclusion lists enable brands to align campaign delivery with their media targeting strategy. This ensures ads only appear on sites and apps that have been included in the media plan and are designated as suitable overall.

For example, when determining the type of sites to consider, evaluate the publisher’s reputation (length of time in business, industry reputation, other advertisers supporting the publisher, editorial staff, etc.).

How to Execute: Sample Considerations for Inclusion/ Exclusion List Development

Topic/ Terms	Inclusion	Exclusion
Politics	A site that is widely regarded for reliable, trustworthy reporting	A site that frequently engages in the dissemination of unverified, exaggerated political stories
Science	Well researched, discovery articles and white papers	Unsubstantiated opinions, poorly researched articles, blogs
Social issues	News from a quality, well-known sites	Social posts, blogs, opinion pieces

Standard Brand Safety & Suitability Categories

There are certain categories of content, such as adult content and violence, that many brands want to avoid. Verification and measurement partners may offer a range of avoidance categories for these types of content. These partners can provide coverage through a combination of semantic science, human linguistics, and manual classification analysis.

Advertisers can work with third-party ad verification partners to choose relevant categories for specific brand suitability preferences. In addition, the 4A’s Advertiser Protection Bureau (APB) has shared standards for different brand safety and brand suitability categories. Advertisers should be cognizant of these standards and aim to avoid content that dips below the Brand Safety Floor.

When it comes to brand safety and suitability, there are two practices to follow: avoidance (where you do not want to appear) and *allowance* (where you exempt certain content, domains, or subdomains from your avoidance settings).

- **Avoidance:** When developing brand-specific suitability categories, it is important to apply industry-accepted, predetermined segments/categories, such as the 4A's Brand Safety Floor categories and IAB's category taxonomy recommendations, or ones created by a vendor partner.
- **Allowance:** At the same time, brands should determine whether to exempt certain publishers or content from their avoidance settings. Don't confuse allowance with contextual targeting. Allowances are a relaxing of your safety and suitability controls to enhance scale. Contextual targeting involves proactively looking for content based on its classification in an attempt to hit an audience around a point of interest. A brand's ad verification partner can share more information on applying these tools.

For example, while a brand may choose to avoid content about violence, it may not desire to avoid such content in certain environments—for instance, the homepage of a trusted news publisher. Exempting certain content from avoidance settings is effective in an emerging news cycle when settings might be overly stringent.

Five Questions to Ask Your Ad Verification Partners:

1. How do you map to the standard 4A's/ IAB taxonomy?
2. How granular can we activate in this category?
3. How granular do I need to go for my brand?
4. When will diminishing returns begin?
5. Applying the alcohol example referenced earlier by asking, can your solution recognize the difference between lifestyle content about wine selections for a holiday party compared to an alcohol-related binge drinking or a drunk-driving incident?

Custom Brand Categories

In addition to categories for content that a broad range of brands may want to avoid, verification partners may also offer custom or curated brand segments as an increased layer of protection. These curated brand segments can be tailored to the sensitivities of a specific brand and may offer controls for brand-specific issues, such as protection from negative corporate news, product recalls, and news about the people working for a brand.

Leveraging Sentiment

Other tools that evaluate content sentiment can help brands control where their messages appear. Content sentiment may be a determination of the tone and intent of a writer or a determination about objective aspects of a content topic that may be suitable for all brands. Brands should work with their verification partners to understand how sentiment may be actionable—either as an independent variable or as an intrinsic part of content classification (i.e., a content category with negative sentiment at the core of its policy).

While different authors may have different opinions on the same issues, many topics have objectively positive or negative aspects that should be considered in content classification.

For instance, an op-ed about a government’s response to a recession may be written with different sentiments based on the political opinions of the author. However, the overall topic of a recession is objectively negative, and this distinction is likely useful for advertisers to take into account.

Content example: Leveraging Sentiment

[“Jack Knox: Cancer-stricken mom feels the love and runs a marathon”](#)

This article explores the story of a mother of two, her life-altering diagnosis of stage 4 breast cancer, and the support she received in her attempt to complete an impromptu marathon run for charity. While the article addresses potentially unsuitable and negative topics, like cancer and disease, the overarching story is positive. In limited contexts, this information may be useful to certain advertisers.

Content Language

Content language suitability controls allow brands to enable reach and appropriately match language-specific advertising creative. This is useful in cases where words may have double meanings—some of which are allowed and others that should be avoided. These words are often categorized as homonyms: words that have identical spelling and pronunciation but different meanings.

Word or term	Allowable Instance	Avoidable Instance
Corona	Corona is a beer brand and also means “crown” in Spanish	Specific reference considered unsuitable based on coronavirus content
Die	“Die”, in German translates as “the”—a frequently occurring and innocuous word	“Die” in English may have a negative sentiment—e.g., “many people are expected to die from coronavirus”
Killing	“Killing me softly with his song” “is the song name and also part of the lyrics	The killing of innocent children
Shooting	Shooting hoops (in basketball), shooting photos, or shooting stars	Shooting a gun

For additional perspective, in a recent IAB panel discussion, a news organization speaker noted, “If a brand excludes the word “shot” you essentially block our entire sports section”—hence the need for contextual tools.

Keyword Lists

Language-specific URL or content keyword exclusion lists allow brands to avoid web content based on headline keywords that appear in the URL or body content. Keyword lists are only a part of a brand’s ad verification toolkit. Keyword lists are most effective when used to control for specific content that the brand is hypersensitive to avoiding. These are known as keyword blocklists. Keyword blocklists are a tool that should be used in conjunction with other tools, such as content-language, and used with caution to maintain scale.

Updating a blocklist regularly can help avoid emerging negative content, increase avoidance precision on specific topics, and block narrow, brand-specific concerns. Brands and agencies should work with ad verification providers to understand methodologies around keyword application specifically at either the URL or body content levels.

Recommendation: Brands and agencies can sometimes lean on keyword blocklists reflexively in the face of breaking news events, but this can be a missed opportunity and can actually have negative brand implications.

For example, at the start of a reinvigorated series of Black Lives Matter protests in 2020 reacting to several murders of unarmed African Americans, some brands excluded terms such as protest, “George Floyd” (one of the victims), “black people”, and “black lives matter.” These actions potentially affected advertising ROI and business outcomes by limiting scale and impacting CPMs, as well as causing a trickle-down effect on short-term revenue losses across the publishing industry.

Modern ad verification techniques combine keyword evaluation with context analysis across web pages to improve outcomes that can be skewed by their URL text creating False Positive and False Negative results.

False Positive

A brand with “shooting” on their exclusion list will receive a False Positive to block for an article with a URL that includes shooting but that refers to stars rather than guns:

“.../meteor-shower-with-up-to-100-*shooting*-stars-an-hour-starts-tonight...”

- By layering a contextual analytical process that examines the entire page, ad verification technology can determine that this URL leads to an astronomy story rather than a topic related to violence.

False Negative

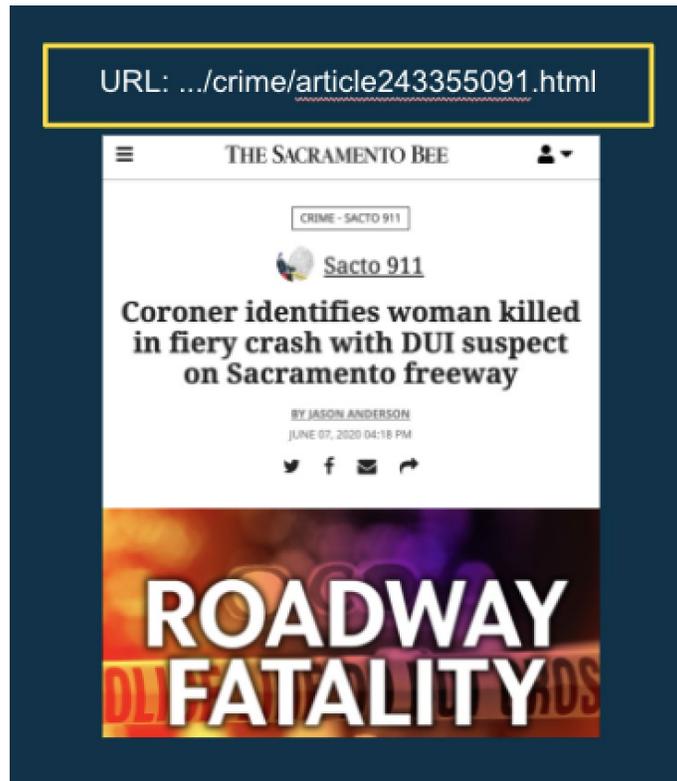
Article title: “Coroner identifies woman killed in fiery crash with DUI suspect on Sacramento Freeway”

URL: <https://www.sacbee.com/news/local/crime/article243355091.html#:~:text=Authorities%20released%20the%20name%20of,year%2Dold%20Rancho%20Cordova%20resident.>

URL-Only analysis: Having “death” or “drunk driving” in your keyword list will not block this page (see example of next page). If the keyword is not in the URL it will not be blocked.

Importance of Contextual Solutions: Solutions that leverage contextual analysis—with semantic science, human linguistics, and manual classification analysis—can determine the actual topic and discussion on a page. These solutions could identify that this page is about an automotive accident, alcohol, and death.

- **Outcome:** A contextual solution analyzes the entire page, not just the URL. In this case, a Brand Safety or Suitability content segment (such as Automotive Accident, Death, or Alcohol Abuse) could offer coverage and protection for brands, regardless of the words that appear in the URL.



Mobile App Controls

Mobile app suitability controls help brands determine which mobile apps align with a brand's campaign objectives. They can help brands avoid apps with poor user reviews or match categories focused on specific content such as entertainment or news.

Prior to the introduction of a single open measurement standard, the mobile ecosystem was in a deadlock. The introduction of company-specific proprietary measurement SDKs required too many integrations for the industry to support. In response, the Open Measurement Work Group (OMWG) was formed in early 2017 to help manage the creation and adoption of the Open Measurement Software Development Kit (OMSDK). The OM SDK resolved the problem of company-specific measurement SDKs by embedding most of the code within the apps themselves. This addressed challenges stemming from proprietary technology, provided equal data access to all vendors to provide the scale of ad buys, and allowed for fraud-free delivery with Media Rating Council (MRC) accredited metrics, all through a lightweight and easy-to-integrate solution.

Page-type Exception Lists

Brands can use exception lists to “exempt” certain pages from their overarching brand suitability controls—effectively overriding avoidance on these pages.

For example, some advertisers use exception lists to exempt news site homepages and section lists, which increases campaign scale and serves to support trusted news publishers.

Transparent Analytics and Reporting

To build trust within the digital advertising ecosystem, every publisher (seller) on a media plan must have access to the same level of data, the same tools, and the same details about content categorization and other assessments that may have impacted brand suitability evaluation.

Pre-bid Filtering

Determining brand suitability early on—before matching a brand to an impression opportunity—is the ideal outcome for all parties. In the programmatic environment, pre-bid avoidance is the first step to achieving that match.

Blocking and Monitoring

It is worth noting that pre-bid avoidance relies on the accuracy of bid stream data that, at times, may be unclear, incomplete or inaccurate, which can render a decision less effective. The same risk occurs in direct deals, where a seller may not have all the necessary controls to match a brand’s suitability settings. As a result, it is important to use active controls like blocking and monitoring *after* an impression is delivered, to account for any shortcomings pre-bid.

Keyword URL Brand Safety Tools

Keyword URL Brand Safety Tools are a necessary part of an advertiser’s toolbox. However, these can add to the chaos and confusion in an already complex advertising ecosystem if misunderstood.

Pre-bid brand safety tools block ads for safety and suitability purposes even before an advertiser bids on them.

However, sufficient information is not always available to flag an unsafe or unsuitable environment based on the URL before the bid closes. The majority of the time, these brand safety and suitability tools block post-bid, and the advertiser still pays for this ad space even when a backup default creative is served. Advertisers who understand how often they still have to pay for brand safety and suitability blocks can use these types of tools to strategically improve their results.

Example: *Sample Brand* is a large advertiser spending over \$1B on ads annually. This advertiser uses Keyword URL technology to monitor where its impressions are served related to socially and culturally sensitive current events.

- Typically, 1% of *Sample Brand*'s total ads are flagged for appearing in potentially unsuitable and unsafe environments with respect to its keyword list.
- Industry wide, false positive rate for keyword URL technologies is generally around 20%.
 - (False positive in this case = flagged impression as potentially unsafe, but the environment is deemed safe for advertising).
- When socially sensitive events spike, this flag rate multiplies tenfold to 8-10% if relevant terms like "Coronavirus", "COVID 19", "George Floyd", "Black Lives Matter" and "Breonna Taylor" are on a keyword blacklist.
- Therefore, *Sample Brand* would limit the scale of its campaign if it blocked keywords for all sensitive topics. In order not to block high percentages of inventory while still paying for these impressions, *Sample Brand and other advertisers use keyword tools in addition to URLs to monitor these impressions.*

A combination of keyword tools and URL analysis allows advertisers to receive full URL reporting on an ongoing basis and make objective determinations based on where ads are being served, as well as if those ad slots are both brand-safe and contextually appropriate.

This monitoring allows time for due diligence before any keyword is blocked. With the implementation of other brand safety tools, such as inclusion lists, 98% of keywords never end up needing to be switched from monitored or blocked because the technology deems the content they appear next to brand safe even if it is socially sensitive.

Case Study: Pre-Bid Planning

- **Brand Safety:** An IT manufacturer experienced a 90% decrease in brand risk by using brand-specific pre-bid brand safety targeting. Applying pre-bid brand safety targeting techniques reduced initial risky impressions from 11.7% to 1.2%. Further, this brand saved 3.8 million impressions, which resulted in a 12% increase in brand safety performance.

Case Study: Pre-Bid Planning

- **Brand Suitability:** A major brand experienced a 60% increase in ROI by applying brand-specific pre-bid brand suitability filtering, saving an estimated \$8,000 by reducing the block rate. This example demonstrates the value of brands working closely with ad verification partners to manage scale and brand equity goals.

Brand Checklist:

Safety and Suitability for the Contemporary Media Landscape

-  **Level Set with Clear Objectives:** Gain consensus among all stakeholders for a clear understanding of your brand's suitability guidelines.
-  **Understand Your Safety & Suitability Coverage:** Ask your analytics and verification provider about your content classification guidelines and policies.
-  **Get to Know Your Tools:** Understand your full brand suitability toolkit and how each tool plays a role in your brand strategy execution.
-  **Review Your Creative Strategy:** Ensure creative imagery, language, and tone reflect brand values.
-  **Know the Effect of Breaking News:** Consider how breaking news stories affect the creative strategy in light of potential imagery, language, and tone.
-  **Never Stop Asking Questions:** Your verification provider can help you adopt the appropriate tools based on your brand's suitability preferences and sensitivities.
-  **Establish a Scenario-Planning Cadence:** Consumer views and popular opinion can change quickly. Establish a business review schedule to consider cultural shifts, their impact on your brand and your customers. Conduct research to validate strategic shifts based on data.
-  **Know Your Partners:** Review your brand's approved publishers lists regularly. Consider if editorial changes in management, point-of-view, publication policies, advertiser makeup, and other issues affect your strategy.
-  **Evaluate Subject Allowances:** Are there new subjects, issues, causes that your brand wants to align with? These can be political (*Black Lives Matter, LGBTQ+, Planned Parenthood, Climate Change, Gun Control, etc.*) impacting long and short-term strategies.
-  **Take a "Revisit, Reset, Repeat" Approach to Your Brand Suitability:** Constantly evaluate your guidelines to incorporate current events and news by revisiting your tool settings, resetting for current events, repeating as news cycles shift and evolve.

PART 2:

**Understanding the Complex
Brand Safety & Brand Suitability
Transaction Process**

Introduction

“Ad-tech,” the amalgamation of several transactional ad-technologies, is one of the most complex of human-made systems. The goal of this section is to educate and effect change in order to address some historic failures of programmatic ad buying.

By “failures” we specifically mean ad calls where there is limited information in the ad-request data that affects pre-bid detection, which contributes to complications in post-bid analytical processes. A main system failure is the standard practice of reporting brand-safety-flagged impressions in aggregate, making reconciliation impossible without a specific impressions ID.

Strategies for verifying transactions change based on whether the detection of content as unsafe or unsuitable happens before the transaction (pre-bid) or after the transaction (post-bid).

- For detection completed pre-bid, the main goal is to avoid unsafe content specific to an advertiser’s requirements, while some suitability analysis is also possible.
- For detection completed post-bid, the main goal is to identify unsuitable environments, potentially serve a different default ad creative, and then target away from those unsuitable publishers or other supply sources in future bidding.

Addressing transaction issues: The ideal scenario for using pre-bid in conjunction with post-bid analysis would be to map unsafe or unsuitable URLs found post-bid to their seller and source IDs. Then, the verification partner would use pre-bid to block those specific sellers and source IDs for the future. While bidstream data can be extremely valuable in targeting and decision-making, it is limited when it comes to determining quality because full visibility into where the ad will serve is not available until right before it happens.

Another way to look at this is the similarity between food safety and taste compatibility, media buyers have varying levels of tolerance for each type of situation.

Why is this important?

Granular controls and classifications empower advertisers to allocate budgets to either align with or avoid content based on campaign objectives and/or brand values.

Different contexts can drive different outcomes, and advertisers increasingly demand control over the contextual adjacencies of their brands *and* the predictive power to optimize future contextual decisions to drive campaign performance. This is especially true within pre-bid environments before an impression is even served, which means advertisers can optimize bidding decisions to focus on those adjacencies that drive desired outcomes.

Considerations for Achieving Success in Brand Safety & Brand Suitability

Here are a series of questions to consider when collaborating with ad verification and measurement partners.

If a direct buy or collection of direct buys gives an advertiser its ideal contextual ad delivery result:

- How can the partner replicate this with future direct buys or programmatic campaigns?
- How does an advertiser or media agency buyer continue to monitor the ideal contextual ad delivery results?
- Is a publisher or a Supply Side Platform (SSP) capable of appropriately classifying its content for direct buys vs. programmatic buys?
- Are the contextual specifications appropriate?
 - Broad specifications allow scale but may potentially allow non-ideal contexts.
 - Narrow specifications may potentially limit scale but will also limit delivery outside the targeted context.

Compliance Adherence

Brands that fall within regulated categories must adhere to regulatory requirements, risking legal action if violated. It can be complex.

Programmatic advertisers and brands should answer the question:

- Does my technology have the ability to offer support for the regulatory requirements needed for both managed and self-service ad buys?

Once the brand safety policy element is understood, participants will need to evaluate business considerations, or suitability requirements, that best support regulatory requirements.

- Publishers (sell-side partners)—what content will enhance revenue without damaging the brand perception for their clients?
- Advertisers/Media Buying Agencies (buy-side partners)—what media best aligns with my brand values?

Programmatic Technical Challenges with Content Classification

This next section highlights some of the issues facing transactional reporting processes involved in post-bid reporting and analysis.

- **Timing Parameters:** Log data retention in DSPs is usually up to seven days, making reconciliation of flagged impressions difficult.
- **Tagging Concerns:** The same ad-tags are used across multiple pages with different content creating reporting inconsistencies and conflicts.
- **Device Differences:** Measurable data points are different in each environment (desktop display, in-app video, CTV, OTT, desktop instream video).
- **Cross-Origin Security (CORS)** prevents real-time in-app brand safety/suitability flagging:
 - Limited to app/bundle IDs because there is no “domain” in-app
 - OM SDK: is voluntary to adopt and sellers can self-declare classification
 - The Open Measurement SDK (Software Development Kit) is designed to facilitate third-party viewability and verification measurement for ads served to mobile app environments, without requiring multiple third-party SDKs.
 - To measure viewability consistently and accurately on mobile apps, an SDK needs to be integrated into a publisher’s app. Historically, verification, viewability, and fraud providers developed and maintained their own proprietary SDKs. This required each publisher and ad tech partner to commit resources to separately integrate with each provider.
 - Until the most recent version of OM SDK 1.3, which was released in December 2019, in-app brand safety was not able to account for all app content beyond the app Bundle ID and app description in the app store.
 - The industry is reliant on sufficient sell-side adoption of the OM SDK 1.3 version in order to ensure proper contextual classification for in-app environments.
- **Inconsistent Data Accessibility:** Buy-side measurement receives full transparency after the transaction is complete.
 - Pre-bid decisioning is based on historical data and self-reported information.
- **Taxonomy Application:** The need for alignment with industry taxonomy (IAB Tech Lab Content Taxonomy) provides uniform categorization for content that is deemed non-monetizable and therefore should be blocked with few, if any, exceptions. The benefits of following the taxonomy guidelines are:
 - A common language across platforms
 - Categories and other vectors (like channel type, source, etc.)
 - Brand Safety Floor categories and suitability/risk tolerance concepts being introduced in version 2.2 (in partnership with GARM/4As/APB).

- **URL Analysis:** Based on either an auction URL whose length is shortened, or truncated length, or a complete source URL which is lengthy often including a full article headline:

Here are examples of the differences in decisioning on Auction URL (truncated) vs. Source URL (full URL).

- Auction URL1 = [espn.com](https://www.espn.com)
- Source URL1 = go.espn.com/nba/curry_shoot_streak.html
- Auction URL2 = [buzzfeed.com](https://www.buzzfeed.com)
- Source URL2 = https://www.buzzfeed.com/captainmarvel_dude/the-way-you-reply-to-these-texts-will-reveal-what-ewdi0p9vzd
- https://www.buzzfeed.com/captainmarvel_dude/the-way-you-reply-to-these-texts-will-reveal-what-ewdi0p9vzd
- Auction URL3 = www.thepennyhoarder.com
- Source URL3 = www.thepennyhoarder.com/debt/student-loan-forbearance/?aff_sub2=homepage
- Auction URL4 = www.theguardian.com/film
- Source URL4 = www.theguardian.com/film/2020/sep/14/good-joe-bell-review-mark-wahlberg-affects-in-moving-homophobia-drama

Normalizing various URL formatting (i.e., [ampproject](https://www.ampproject.org) domains)

- Even when the full URL is available, *different formats* can be used depending on how the user is viewing the content. This example demonstrates two URLs for the same content within the same publisher.
 - <https://www.adweek.com/programmatic/tags-new-brand-safety-certification-program-requires-third-party-audits/>
 - <https://www-adweek-com.cdn.ampproject.org/c/s/www.adweek.com/programmatic/tags-new-brand-safety-certification-program-requires-third-party-audits/amp/>

Browser-Based Limitations on URL Transparency

Client-side JavaScript measurement and verification solutions are limited by the environment into which they are loaded. Generally speaking, to achieve fully accurate and granular brand safety and suitability reporting and blocking functionality, a vendor's **tag** must be able to access the full URL of the top browser window—that is, the URL of the page a user is actually on (not simply the URL of the ad iframe in which the tag might load).

Recent changes to default referrer policies by all major browsers are increasingly limiting the ability of tags to obtain this full URL. In such cases, more limited information (such as the domain) may be available instead. It is important for advertisers to speak with data analytics or verification providers to understand whether they can provide transparency into the rate at which measurement occurs at the URL vs. domain levels, and how brand safety measures are calculated given these challenges.

Here are some considerations:

- Measurement technologies should not expect the full URL by default.
- Measurement technologies rely on publisher implementations to bypass the restriction.
- Recommendations around reporting of domain-based classification vs. full URL based classification.
- Site Lists should be qualified based on referrer policy.
- Strict Origin Restriction should be avoided, like not having an [ads.txt](#) file.

The Digital Ecosystem

Before a toolkit is built or implemented, it is important to recognize the role the entire digital ecosystem plays in upholding a brand suitability framework. Multiple parties are responsible for the implementation of a suitability framework, therefore it's critical to note how each party can protect a brand and the limitations each party currently faces.

	Responsibility / Remit within the framework	Targeting Parameters	
		Zero Tolerance	Contextual Suitability
Advertiser	Uses brand values to set a framework	<ul style="list-style-type: none"> -Keyword Lists for Blocking Tools -Site Inclusion Lists/ Exclusion Lists -Continual and regular maintenance of inputs listed above 	<ul style="list-style-type: none"> -Keyword Lists for Blocking Tools -Site Inclusion Lists/ Exclusion Lists -Continual and regular maintenance of inputs listed above -Contextual Segments
Agency	Produces a media plan in line with framework, works with an advertiser to create a framework	Implements regulatory brand category issues	Develops and applies suitability strategy with third-party partners
DSP	A Demand Side Platform (DSP) allows buyers to evaluate and bid on ad inventory across multiple ad exchanges in a single interface	<ul style="list-style-type: none"> -Proper detailed labeling of creative categories -Avoid sampled implementation and enforcement 	<ul style="list-style-type: none"> -Proper detailed labeling of creative categories -Avoid sampled implementation and enforcement
SSP	A Supply Side Platform (SSP) enables publishers to manage and monetize ad inventory, prioritizing guaranteed and non-guaranteed demand sources	<ul style="list-style-type: none"> -Remove seller tags for sites like LiveLeak.com (https://www.liveleak.com/ads.txt) -Enforcing and routinely checking proper labeling of contextual categories -Exoneration of legitimate sellers as a method of onboarding vs incrimination of illegitimate sellers -Continual maintenance of seller IDs and inventory; when allowing self-declaration for sellers, the burden of proof should lay with the SSP 	<ul style="list-style-type: none"> -Enforcing and routinely checking proper labeling of contextual categories -Exoneration of legitimate sellers as a method of onboarding vs incrimination of illegitimate sellers -Continual maintenance of seller IDs and inventory; when allowing self-declaration for sellers, the burden of proof should lay with the SSP

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	Responsibility / Remit within the framework	Targeting Parameters	
		Zero Tolerance	Contextual Suitability
Publisher	Produces editorial and entertainment content available for advertising within the programmatic ecosystem	Allows third-party analytics partners to evaluate content for advertising consideration	Allows third-party analytics partners to evaluate content for advertising consideration
Verification Partner	Capability transparencies and reporting clarity integrations at the platform level	<ul style="list-style-type: none"> -Apply domain, keyword, and sentiment list specific to <i>zero</i> tolerance categories. -Clearly report the measurable event rate 	<ul style="list-style-type: none"> -Apply domain, keyword, and sentiment list specific to <i>low/medium</i> tolerance categories. -Clearly report the measurable event rate

After an advertiser determines its brand suitability framework, it must consider a second, equally important component: its tolerance for serving outside of the established targeting (i.e. geo, audience, contextual, etc.) parameters. For example, will an advertiser allow its ads to be served against content concerning controlled substances? Major negative press that might tarnish a brand by association? Potentially embarrassing content?

Considerations for Targeting Parameters

	Zero Tolerance	Contextual Alignment
Tolerance Level	Zero Tolerance. Must be prepared to over-block to avoid compliance consequences and prepared for impacting reach/scale	Low/Medium Tolerance. Must be prepared to under-block in pre-bid
Implications for Advertisers	<ul style="list-style-type: none"> -Legal Implications -Fines -COPPA -Public Safety -Scale -CPM increases 	<ul style="list-style-type: none"> -Audience Discontent -Monetizing Content unaligned with sponsor
Implications for Publishers	<ul style="list-style-type: none"> -Specific targeting (i.e., geo, audience, contextual, etc.) capabilities are required for certain advertisers due to regulatory demands and the need to provide targeting assurances -Lack Monetization Control the limited inventory -Increase pricing/ CPMs increases 	<ul style="list-style-type: none"> -Pricing/Monetization -Erosion of brand equity -Scale/ Reach -Increase pricing/ CPMs increases

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	Zero Tolerance	Contextual Alignment
Violation of Framework-Violations can occur when demo, regulatory and other restrictions are not met	<ul style="list-style-type: none"> -Legal Cannabis Ad intended for California but served in Arizona. (Little legal precedent, which makes risks for first violators even higher. FTC and other regulatory bodies might make examples out of the first case.) -Audience Composition and Requirements -Beer/Wine/Spirits ad on children’s content -Gambling or Sports Betting ad on young adult content 	<p>Beauty: Makeup ad next to an article about society becoming increasingly vain</p> <p>Alcohol: Beer/Wine/Spirits ad on automotive content</p> <p>Food-Ad: for a subscription meal service next to an article about food contamination/foodborne illnesses</p> <p>Confectionery: An ad for a candy bar next to an informational article about diabetes</p>
High-Level Buyer Prioritization	<ul style="list-style-type: none"> -Compliance requirements outweigh the desires for maximum reach -False Negative (Not flagging a brand un-safe transaction) has more implications than a False Positive (Overblocking on brand-safe transactions) -Identify instance before bidding -Proper creative classification helps streamline efficient bidding -Identify instances before ad serving (80% of the time) 	<ul style="list-style-type: none"> -Reach/Scale limitation concerns can outweigh exact Suitability guidelines -False Positive has more implications than a False Negative (Limits scale) (Rather allow a few instances of undesired content alignment, then overblock and miss out on reach/scale) -Identify signals of unsuitability post-delivery -Based on the threshold, target away from those sources in the future -Media Buyer cannot prevent \$100 from going to the undesired publisher but can prevent \$100,000
Targeting (location)	<p>In addition to various local, regional, state, and federal requirements, media buyers should be mindful of avoiding all advertising and marketing that may be directly or indirectly perceived to be attractive to minors, even in a legally drinking age compliant environment</p>	N/A

Additionally, several transitional signals allow for the moderation of delivered media against an established suitability framework.

Defining Transactional Signals and Their Application

Transactional signals	Define it / How it works	Targeting Parameters / Considerations	
		Zero Tolerance	Contextual Suitability
Pre-bid Signals	The main objective is to avoid bidding on unsafe content specific to the advertiser's requirements, while some suitability analysis is also possible	<ul style="list-style-type: none"> -Truncated Auction URL (seller declared) -Geo-Region (IP or lat/long) -Seller ID 	<ul style="list-style-type: none"> -Truncated Auction URL (seller declared) -Geo-Region (IP or lat/long) -Seller ID
Post-bid Signals	The main goal is to identify unsuitable environments, potentially serve a different default ad creative, and then target away from those unsuitable supply sources in future bidding	<ul style="list-style-type: none"> -Full Source URL (where creative is delivered) -Contextual Data based on the body of the page -Geo-Reporting (IP and lat/long) -Contextual Analysis Tools can be activated 	<ul style="list-style-type: none"> -Full Source URL (where creative is delivered) -Contextual Data based on the body of the page -Contextual Analysis Tools can be activated
Implementation (by media buyer)	Measurement tags are typically placed manually on every ad placement. This long process can occasionally force media buyers to miss or skip tagging on certain campaigns considered to be reliable	<ul style="list-style-type: none"> -On all campaigns (avoid sampling due to compliance) 	<ul style="list-style-type: none"> -On all campaigns (sampling more common, but still less reliable than non-sampled implementation)
Reporting	Post-campaign analysis to determine impressions, billing, and other metrics	<ul style="list-style-type: none"> -Keyword reporting on 100% of impressions 	<ul style="list-style-type: none"> -Post-bid URL reporting on 100% of impressions (exclusion/inclusion list reporting) -Keyword reporting on 100% of impressions -Post-bid URL reporting on 100% of impressions (exclusion/inclusion list reporting) -Contextual Analysis and Reporting
Optimization (Future Avoidance)	Bidders can increasingly be customized for specific positive and negative targeting. Media buyers are encouraged to explore these options to target contextual audiences that have proven positive for campaigns historically	Identified contexts that are not tolerable can be actively avoided from bidding for the remainder of the campaign or across an advertiser.	Future contextual targeting can be towards advertiser/campaign suitability. Identified unsuitable contexts can also be actively avoided from bidding to avoid accruing unnecessary verification costs for known unwanted impressions.

Case Study: Cannabis, a Complex Vertical in the Brand Safety (*compliance*) vs. Brand Suitability (*contextual*) Conversation:

Cannabis has long been a content-category that many brands have avoided; however, if you look at deeper 'article by article' analysis, context can matter significantly. According to a recent study,⁵ 45% of consumers agree that it is suitable for brands to be adjacent to cannabis content online. This holds true whether a state has legalized cannabis or not, in fact there is an even higher tolerance in legal and medically legal states.

Within the cannabis vertical, ad verification tools can analyze the nuances of an article for a more precise understanding of the value it brings to an advertiser by evaluating the article's text and its intended sentiment. Ad verification tools guide the application of state-level regulatory differences for cannabis advertising. These types of tools will become even more valuable as this industry establishes unique, category, and product-specific guidelines for the cannabis vertical.

IAB Tech Lab continues to release taxonomy enhancements to improve brand safety for advertisers including the evaluation of cannabis. This is necessary due to the ongoing state to state regulatory changes.

Cannabis is currently covered by the IAB Brand Safety Drug category. Brand safety categories allow advertisers to assign risk thresholds (high/moderate/low) per category.

- For the Drug category, considerations include endorsement, recipes for planting/growing, medical use, informational/educational, etc. These topics fall under different thresholds within drug category classifications allowing for a deeper level of understanding.

Examples – This overview chart below maps out ways that regulatory requirements impact three key categories of programmatic participants for cannabis advertising, a highly complex and regulated vertical.

1. **Platforms and technologies:** Vendors such as DSPs, SSPs, social or other buying platforms, and location data providers.
2. **Brand suitability and contextual relevance:** media owners, publishers, brand safety, and contextual targeting solution providers.
3. **Workflow implications:** Agencies and managed service providers

⁵ Consumers, Cannabis & Context: Exploring the perception of a Growing Industry, Integral Ad Science (IAS), May 2020

Applying Advertising Parameters to the Cannabis Vertical

Targeting - Geo & Data	
Compliance (Regulations)	Business Considerations
<p>Federal Regulation: Product Category</p> <p>Hemp-derived CBD: Federally legal in all US states</p> <p>THC infused CBD with under 0.3%: THC is legal in 47 states. (Federal Farm Bill 2018)</p> <p>THC: Varies medical vs adult-use # of states, Illegal Geos</p>	<p>Technology: Geo, location-specific targeting</p> <p>Brand Suitability: What product types are approved for my business? What categories do they represent?</p> <p>Workflow: increased campaign set up complexity, deal ID negotiations. Decreased scale dependent on geo-targeting.</p>

Creative	
Compliance (Regulations)	Business Considerations
<p>FDA Regulation: Product Labels, Fair Balance Language FDA Approved Label, Product Descriptions, or advertisements.</p> <ul style="list-style-type: none"> • No false health claims to cure or alleviate ailments • No false claims on the product label • No labeling a CBD product as a dietary supplement 	<p>Technology: Contextual solutions</p> <p>Brand Suitability: Creative quality reviews</p> <p>Workflow: Creative reviews, a non-traditional step in a standard programmatic workflow, adding launch time to campaigns</p>

For more information on Cannabis Advertising, click here to read [IAB's Programmatic Advertising: A Close Look at Cannabis.](#)

Transactional/Operational Recommendations for the Media & Advertising Industry:

Recommendations for Buyers (Advertisers/Agencies)

- **The Details Matter:** Educate yourself on the procedures and capabilities of your third-party partner options.
- **Transparency Should Always be a Priority**
 - Check the referrer policies of the sites on your domain inclusion list and track the rate of transparent sites.
 - Know your billable event: Auction Won, Creative Download, Begin-to-Render, Full-Render.
 - Push for full disclosure of pre-bid coverage rate from verification vendor: sampling rate + lack of information available in a pre-bid scenario.
 - Data review: Analyze the full URLs of where impressions were served.
- **Set Expectations**
 - Establish a Flag Rate Threshold: X%-Y% (i.e., 8%-10%) violation rate with distinctly brand unsafe content (Factors to calculate threshold: the degree of restrictions, legal vs. suitability constraints, the accuracy of the solution being used).
- **Sharing is Caring**
 - Reconciliation Process: Provide all relevant data to the platform.

Recommendations for Platforms (DSPs, Exchanges, SSPs)

- **Work towards ensuring the recording of the third party flagged brand safety suitability violations in reporting to buyers**
 - Work towards mapping brand safety/suitability flagged impressions to auction ID for log files.
 - Provide buyers with industry-aligned taxonomy.

Recommendations for Measurement/Verification Companies

- **Transparency Should Always be a Priority**
 - Full disclosure of pre-bid decisioning coverage rate
 - Full disclosure of pre-bid sampling rate
 - Full disclosure of post-bid sampling rate
 - Full disclosure of post-bid decisioning coverage rate
 - Reporting of pre-bid block rate by the supplier

- **URL Management**
 - Disclosure of post-bid domain-only rate (i.e., % of impressions where full URL wasn't available).
- **Accuracy at All Times**
 - Provide precise categorization for violations.

Recommendations for Publishers

- A clear distinction between publisher-created content vs. user-generated content.
- Provide buyers with industry-aligned classification taxonomy for monetized content pages.
- For advertiser transparency, set a referrer policy to “No Referrer When Downgrade” that will always send the full URL <https://developer.mozilla.org/en-US/docs/Web/HTTP/Headers/Referrer-Policy>.
- Provide buyers with clear pricing tiers based upon advertiser risk comfort.

About Us



The Interactive Advertising Bureau (IAB) empowers the media and marketing industries to thrive in the digital economy. Its membership is comprised of more than 650 leading media companies, brands, and the technology firms responsible for selling, delivering, and optimizing digital ad marketing campaigns. The trade group fields critical research on interactive advertising, while also educating brands, agencies, and the wider business community on the importance of digital marketing. In affiliation with the IAB Tech Lab, IAB develops technical standards and solutions. IAB is committed to professional development and elevating the knowledge, skills, expertise, and diversity of the workforce across the industry. Through the work of its public policy office in Washington, D.C., the trade association advocates for its members and promotes the value of the interactive advertising industry to legislators and policymakers. Founded in 1996, IAB is headquartered in New York City.

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The IAB Programmatic+Data Center is a unit within IAB, founded to enhance existing IAB resources and to drive the data agenda for the digital media, marketing, and advertising industry. The Programmatic+Data Center's mission is to expand the programmatic universe, increase the understanding of how data drives business, and make them easily accessible to all.

IAB Programmatic+Data Center is focused on:

- Gathering industry thought leaders to drive and set the data agenda
- Funding industry research to provide benchmarks and actionable insights on data management across platforms including programmatic, mobile, and the internet of things
- Developing industry best practices, guidelines, and standards for privacy, data security, measurement, and consumer data protection
- Creating educational materials including certification, infographics, videos, webinars, and seminars to demystify data for marketers and advertisers
- Hosting data-focused events that feature industry luminaries discussing data related topics

<https://www.iab.com/topics/iab-programmatic-data-center/>