



The State of Brand Suitability

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The state of brand suitability

Brand safety

refers to the controls that companies use to protect brands against negative impacts to the brand's consumer reputation. Threats to brand safety generally involve specific types of content.

Brand suitability

describes a marketer's desired targeting parameters regarding subjective variables. These can include factors such as content adjacency, viewability, audience demographics and others.

In early 2017 brand safety became the dominant topic in the digital ad world, with industry pros wringing their hands over the possibility of ads appearing adjacent to terrorist recruitment videos or pornography. And for quite awhile, there wasn't much consensus around who should be responsible for addressing the threats, or how effective the digital marketing industry's overall response had been.

However, as we edge closer to 2020, that's mostly changed. Marketers now frequently indicate — in surveys and in industry-wide discussions — that they're somewhat satisfied with the steps the industry has taken to address brand safety, from the introduction of tighter controls to stricter policies around blocking offensive content.

But there's another issue that's gotten less attention: brand suitability.

New State of the Industry research from Integral Ad Science (IAS) and Digiday indicates that a slew of marketers will be shifting focus from safety to suitability in the year ahead. Indeed, come next year, digital media professionals report that brand safety and brand suitability will be equal concerns.

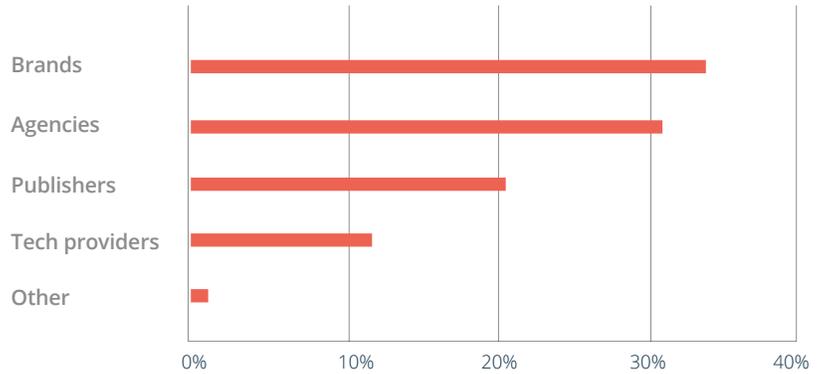
Our research revealed that brand suitability is emerging as a dominant concern for marketers of all stripes. In the not too distant future, marketers say they'll be prioritizing brand suitability just as much as brand safety.



Who did we speak to?

Company type

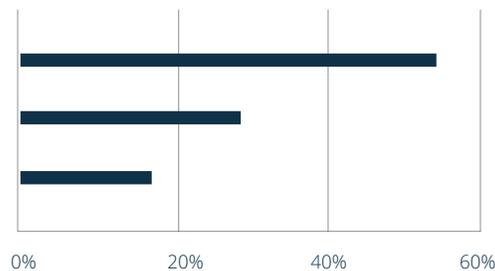
For the Digiday/IAS State of the Industry (SOTI) report, we surveyed 120 media professionals from brands, publishers, agencies and technology providers. There was a relatively even distribution of survey takers from all types of companies, with 34 percent coming from brands, 31 percent coming from agencies, 21 percent coming from publishers, and 12 percent coming from tech providers.



Director/manager level

Staff/individual contributor

C-Suite or VP level



Seniority level

Most of the individuals who responded to the survey - a solid 54 percent majority - said they were a director/manager. "Staff/individual contributor" came in at a very distant second, with 28 percent. Only 15 percent said they sat at the C-Suite or VP level.

responses are rounded up

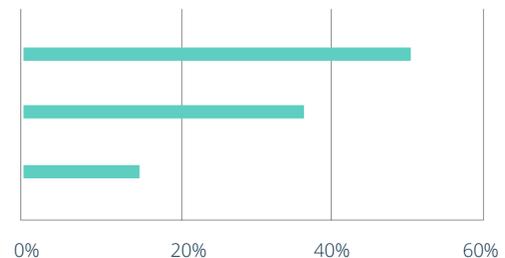
Company size

Most respondents came from smaller companies. Fifty percent of respondents said their organizations had 1,000 employees or less, and 37 percent said their organizations had between 1,001 and 10,000 employees. Only 14 percent said their companies had more than 10,000 employees.

1,000 employees or less

1,001 - 10,000 employees

10,000 employees or more



responses are rounded up

Now we have a clear picture: All participants were mostly senior (though not top-level) employees from small to midsize companies.

Of all these identifiers, the even distribution between brand, publisher,

agency and tech company respondents may be the most telling: Individuals on all sides of the digital ad ecosystem are thinking hard about brand suitability and brand safety issues — and have a stake in addressing them.

So who's most responsible for solving these problems? What solutions should be employed? As we dive deeper into our research, we'll find that there's some widespread disagreement on these points and others.

Do media pros know that brand suitability and brand safety are different things?

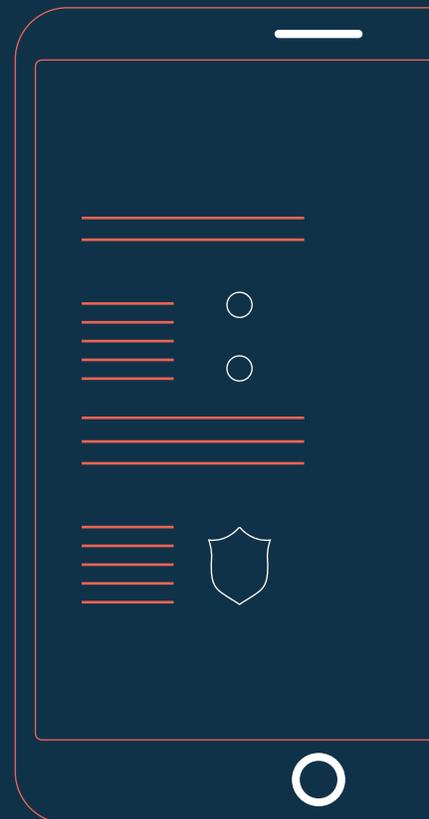
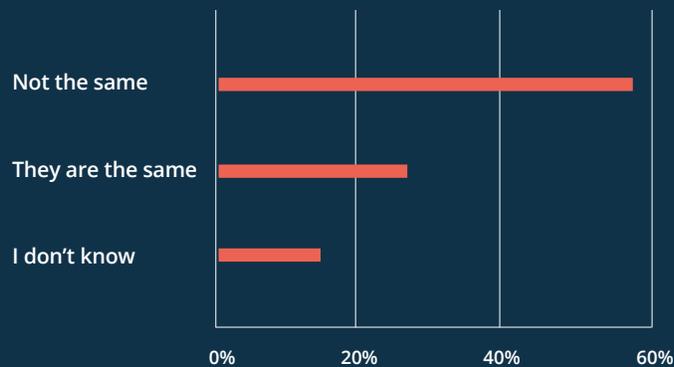
Early on in our survey, we defined the terms “brand suitability” and “brand safety” for our industry professionals. But just before we did, we asked them a very simple question: “Are brand safety and brand suitability the same thing?”

They’re not, of course, and most respondents recognized the difference. A majority — 58 percent — said that brand safety and

suitability are not the same. Still, more education is needed: A not-insignificant 27 percent of digital media professionals said that they are the same. Moreover, a further 16 percent said they didn’t know.

As you will see in the rest of the report, most marketers now tend to address safety and suitability issues differently, both in theory and in practice.

Are brand suitability and brand safety the same thing?



Trade group moves — and what marketers think of them

The APB and brand safety

In 2018, the 4As launched the Advertising Protection Bureau (APB), a trade group aimed at establishing guidelines for brand safety and suitability. The APB delivered comprehensive frameworks for both safety and suitability in September.

Establishing guidelines was a step in the right direction, but there is still disagreement across the industry. Brands, publishers and advertisers often have varying opinions on how they define both brand safety and brand suitability.

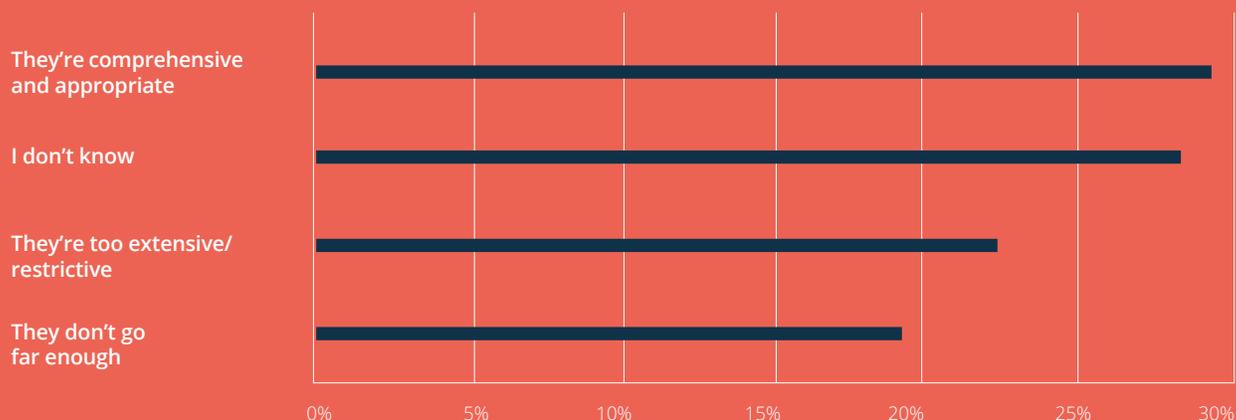
For instance, when discussing brand safety specifically, 19 percent of those interviewed said that the APB's brand safety guidelines don't go far enough while another 25 percent said that the guidelines are too restrictive and extensive. Only 29 percent reported that the APB's guidelines are comprehensive and appropriate.

We discovered that, even though there was disagreement, one thing was clear: The individuals who definitively said that the APB's guidelines aren't working significantly outnumbered those who said that they are, by a margin of 15 percent.

The fact that similar segments of those 44 percent are diametrically opposed regarding why those guidelines aren't good enough simply adds another element of confusion to the mix, emphasizing fractures and competing objectives in the digital marketing industry.

Another large fraction of individuals (27 percent) say they don't know enough to answer the question, likely indicating an unfamiliarity with the guidelines — even a year later.

In your opinion, which of the following statements best describes the Advertiser Protection Bureau's guidelines when it comes to brand safety?



The APB and brand suitability

When we compare marketers' opinions about the APB's brand safety guidelines to their opinions about its brand suitability guidelines, there are some subtle yet telling shifts. Namely, favorability and knowledge both decrease.

As previously mentioned, 29 percent of digital media professionals said they thought the APB's brand safety guidelines were "comprehensive and appropriate." When we asked about the APB's brand suitability guidelines, only 19 percent said those were "comprehensive and appropriate."

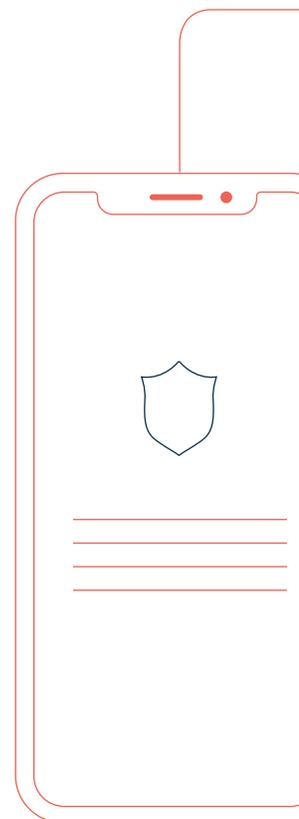
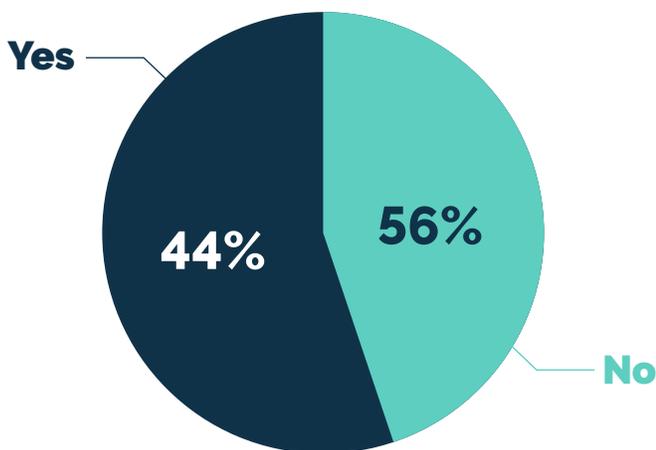
Overall dissatisfaction is increasing as well, with 50 percent of survey takers saying that the guidelines were too extensive or didn't go far enough (as compared to 44 percent who said the same of the APB's brand safety guidelines.) Furthermore, a subtle but telling shift, 32 percent of respondents didn't know enough about the APB's brand suitability framework to form an opinion, as opposed to 27 percent who said the same for brand safety.

Our findings indicate that trade groups like the APB have more work to do in providing appropriate brand safety

guidelines. But it is apparent that the problem is even more acute when it comes to brand suitability. *Indeed*, every major indicator in our survey edged further from satisfaction when we shifted from safety to suitability — and further from understanding as well.

It's evident that the industry requires more education on the subjects of brand safety and brand suitability — particularly the latter.

Are you familiar with the brand suitability and brand safety guidelines issued by the Advertising Protection Bureau (a trade group launched last year under the 4As)?



The industry as a whole

Overall, marketers are somewhat satisfied with the industry's brand safety efforts — the key word being "somewhat".

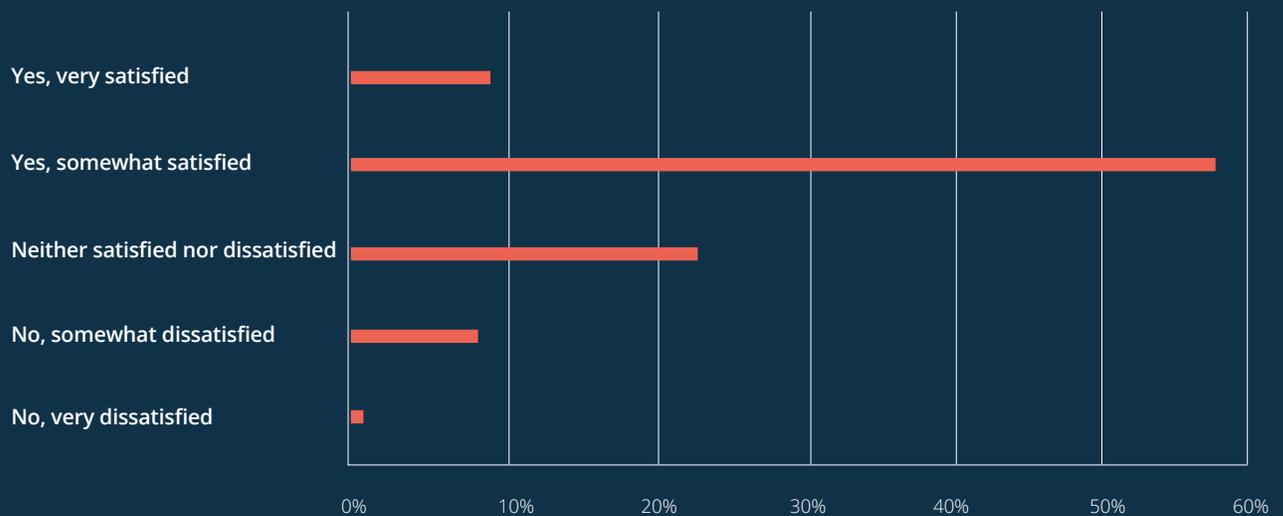
The digital ad industry's efforts to combat brand safety and suitability threats don't just boil down to one trade group. From technology providers to publishers to brands themselves, many different avenues and solutions are regularly being pursued and proliferated into the market.

When it came to boosting brand safety in particular, most participants told us they were satisfied with the digital ad

industry's efforts. But the devil is in the details; a closer look shows us that this "satisfaction" is lukewarm. Fifty-eight percent said they were "somewhat satisfied," while only nine percent said they were "very" satisfied.

While the numbers are ostensibly favorable, they don't indicate that marketers are thrilled about the direction of the industry's approach to brand safety. At the very least, there's room for improvement.

On the whole, are you satisfied with the steps that the digital marketing industry has taken to address and mitigate brand safety concerns within the past year?



Satisfaction is lower for brand suitability

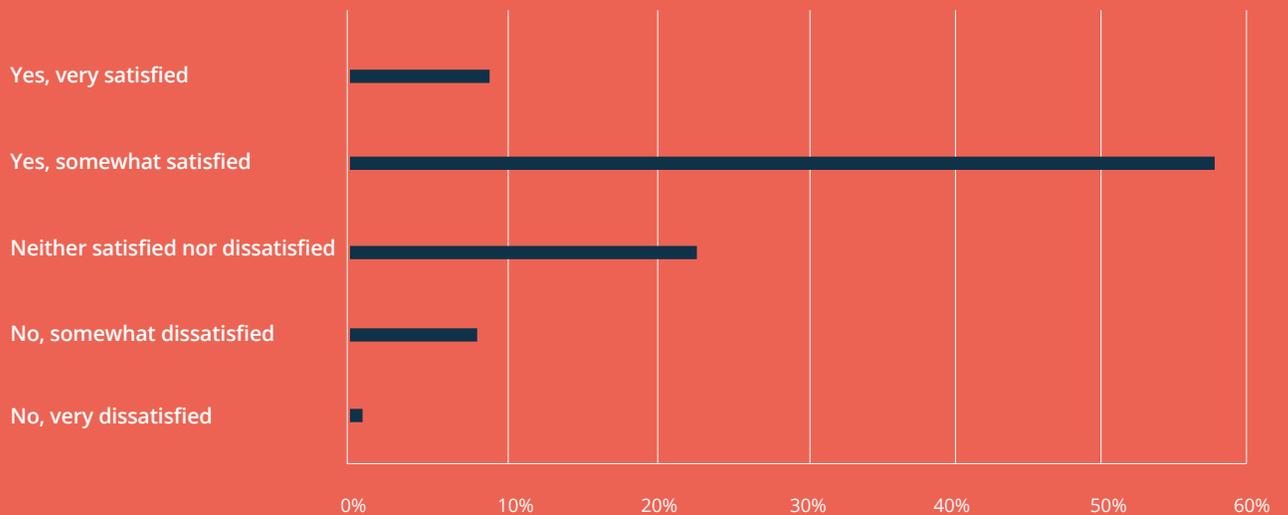
While 67 percent of those interviewed said they were satisfied with the digital marketing industry's overall approach to brand safety, only 56 percent said the same about brand suitability. (It is worth noting, however, that the percentage of individuals answering "very" satisfied was significantly higher.)

Meanwhile, 13 percent were dissatisfied - as compared to nine percent who said the same for brand safety, and 31

percent couldn't say one way or another - as opposed to 23 percent for brand safety.

The shifts are subtle, but when we move from safety to suitability, we once again see clear indications that digital media professionals are less enthusiastic about the state of play — or, in some cases, they simply have less knowledge.

On the whole, are you satisfied with the steps that the digital marketing industry has taken to address and mitigate brand suitability issues within the past year?



What's the bigger priority right now, safety or suitability?

Next we asked marketers what the biggest priority was for their organization: brand safety or brand suitability. As a reminder, by this point in the survey, we had clearly defined the terms “brand safety” and “brand suitability,” ensuring that any individuals initially unclear on the differences had the proper understanding to answer these questions.

A 57 percent majority of respondents said that, currently, brand safety is a

bigger priority. Twenty-four percent said brand suitability was a bigger priority, and 19 percent said they were equal.

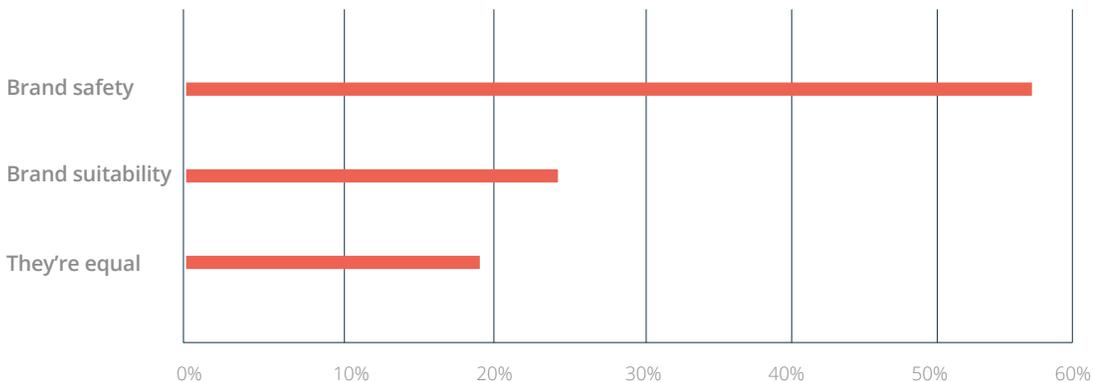
It's worth noting that, when we add the latter two data points together, we see that 43 percent of respondents already say that brand suitability is currently as or more important to their organization than brand safety — not a majority, but still a large number.

Consistently, brand safety clearly

emerges as the biggest current priority. It's not terribly surprising, given that the subject has dominated discourse surrounding digital advertising for several years, and that many industry pros (as clearly indicated by their responses to previous questions) don't fully grasp what brand safety is or what overall steps the industry is taking to address it.

However, things change dramatically when we ask about the near future.

Priorities



What about next year?

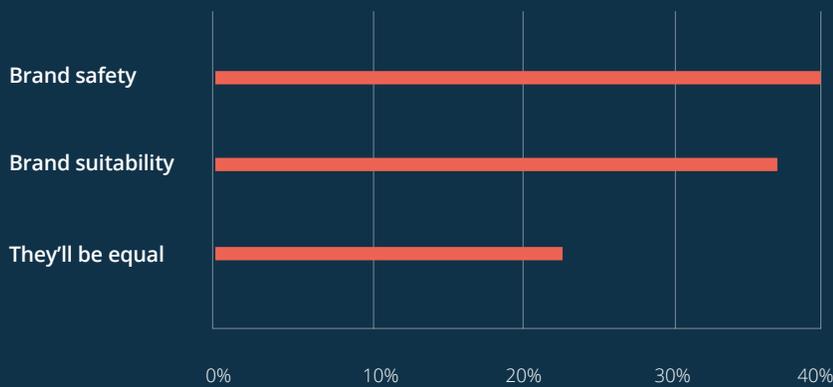
When we ask marketers what things will look like next year, suddenly they prioritize safety and suitability nearly equally. 37 percent said that brand suitability would be the bigger priority next year, while 40 percent said the same of brand safety.

Moreover, a further 23 percent said that they would be equal priorities. In other words, a 60 percent majority of digital media pros said that brand suitability will

be equally or more important than brand safety next year.

These numbers starkly illustrate shifting priorities for digital media professionals, who appear to be reaching higher levels of satisfaction and understanding when it comes to brand safety. As brand safety concerns somewhat diminish, brand suitability is rapidly emerging as an equally urgent concern.

Priorities next year



Marketers can — and do — distinguish between brand safety threats and brand suitability threats

We asked respondents about a number of different potentially harmful factors, gauging whether they considered them to be brand safety threats, brand suitability threats, or both. It quickly became clear that the majority of digital marketers made obvious distinctions.

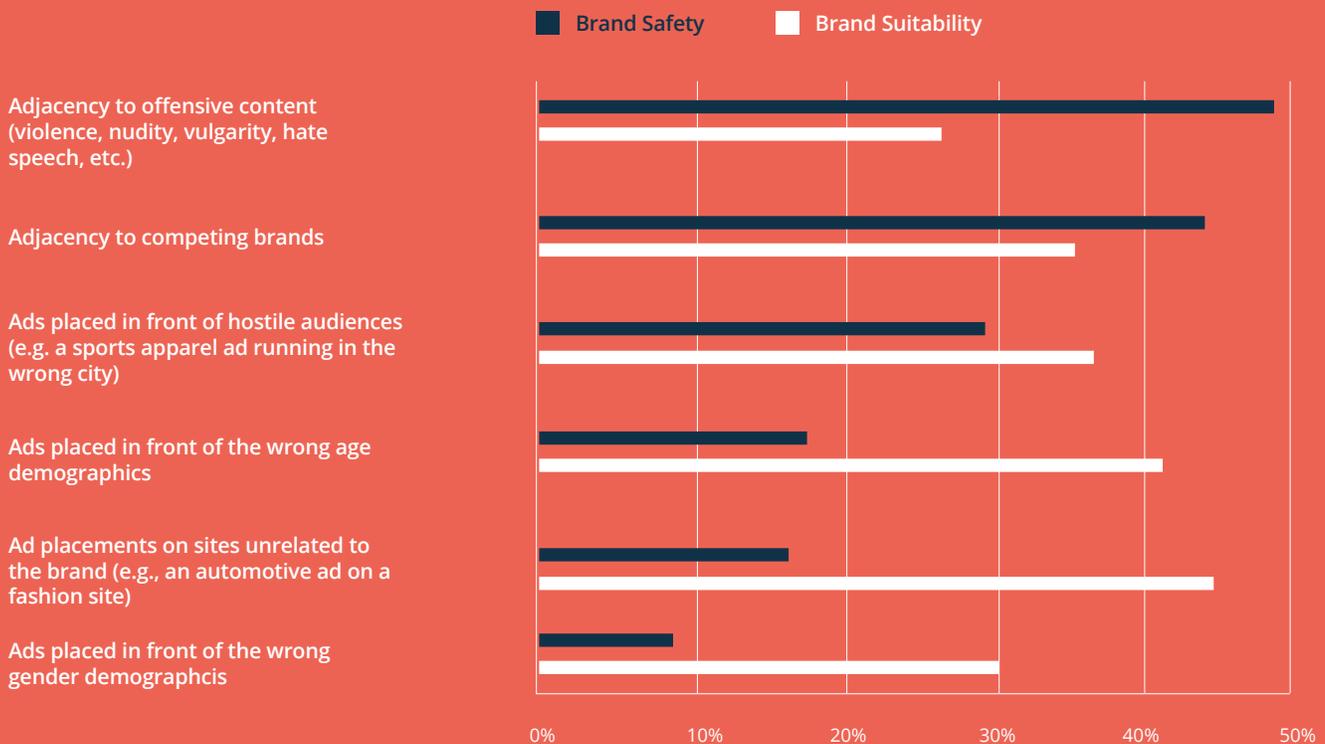
The responses demonstrate that most marketers — especially once presented with the definitions of “brand suitability” and “brand safety” — can (and do) make clear distinctions between brand suitability threats and brand safety threats. For most marketers, “brand safety” is likely to refer to unfortunate adjacencies, including violence, vulgarity or even competing brands.

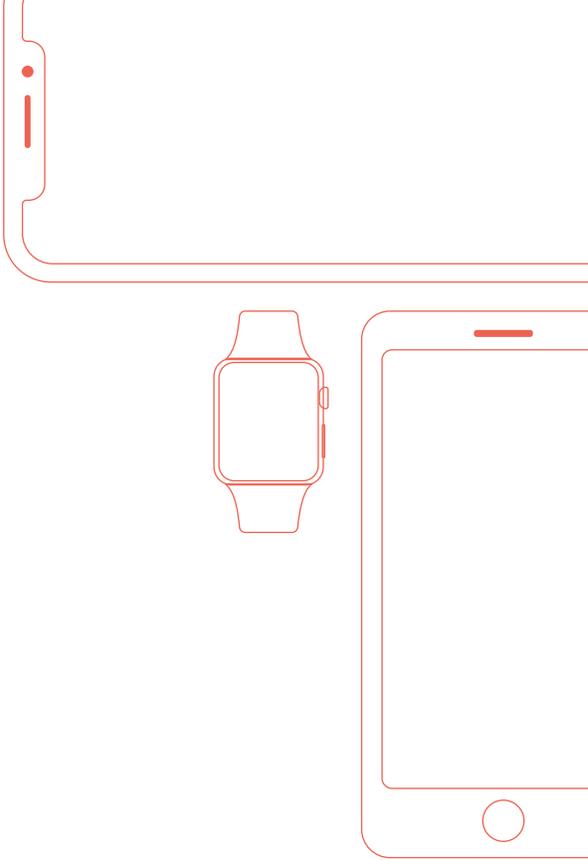
But certain types of threats clearly hew closer to the brand suitability spectrum, especially those involving placements in front of the wrong audience demographics, on the wrong platforms, or in the wrong locations.

Reaching the correct demographics and locations through the right platform has long concerned digital advertisers. The shift in focus toward brand suitability isn’t exactly a new or emerging issue. It may simply be the case that, as the marketing industry has done a better job of addressing brand safety threats, marketers have gained more breathing room to once again focus on suitability.

The increasing sophistication of verification technology, which has enabled marketers to optimize campaigns based on their own risk tolerance levels, has likely played a major role in this. Digital media pros are becoming more adept at accounting for safety and suitability simultaneously, targeting their ads in nuanced ways that are tailored to their own needs. This approach stands in stark contrast to the blunt-force, all-or-nothing approach that many brands were taking to brand safety just a year or two ago.

Which of the following factors do you consider threats to your business?

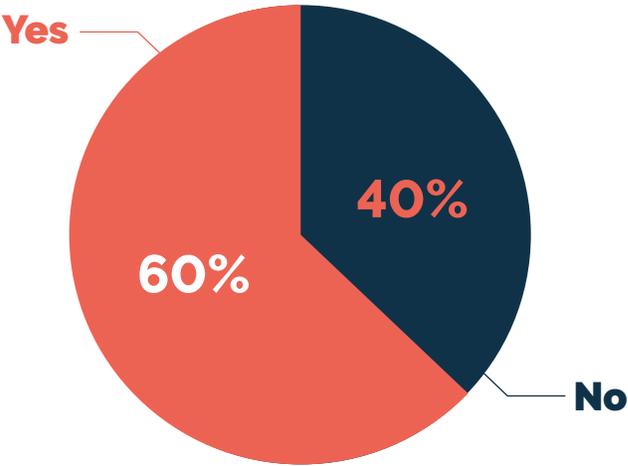




Marketers don't just think safety and suitability are different — they're confident they're approaching them differently

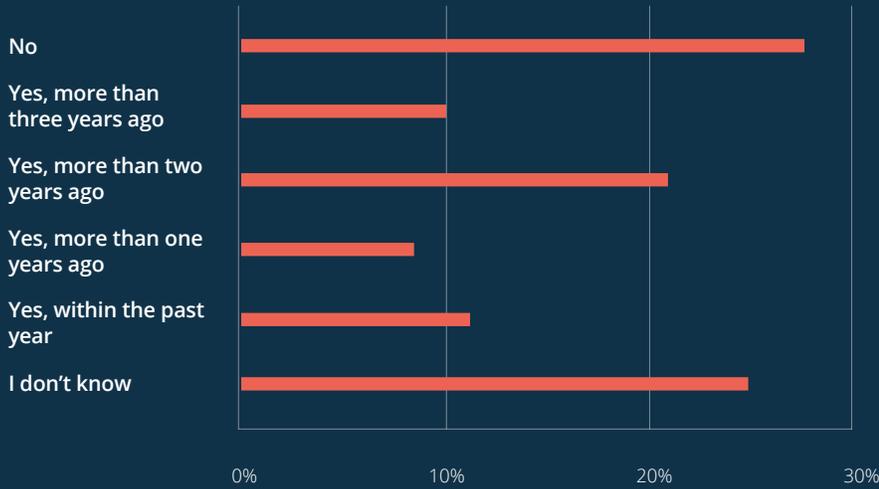
60 percent of digital media professionals answered "yes" to the question, "Does your organization take steps to maximize brand suitability that are distinct from its efforts to maximize brand safety?"

That 60 percent figure is exactly in line with the 60 percent of digital media pros who said brand suitability concerns will equal or surpass brand safety concerns in 2020. In other words, the professionals who are prioritizing brand suitability recognize that safety and suitability require distinct tactics and solutions.



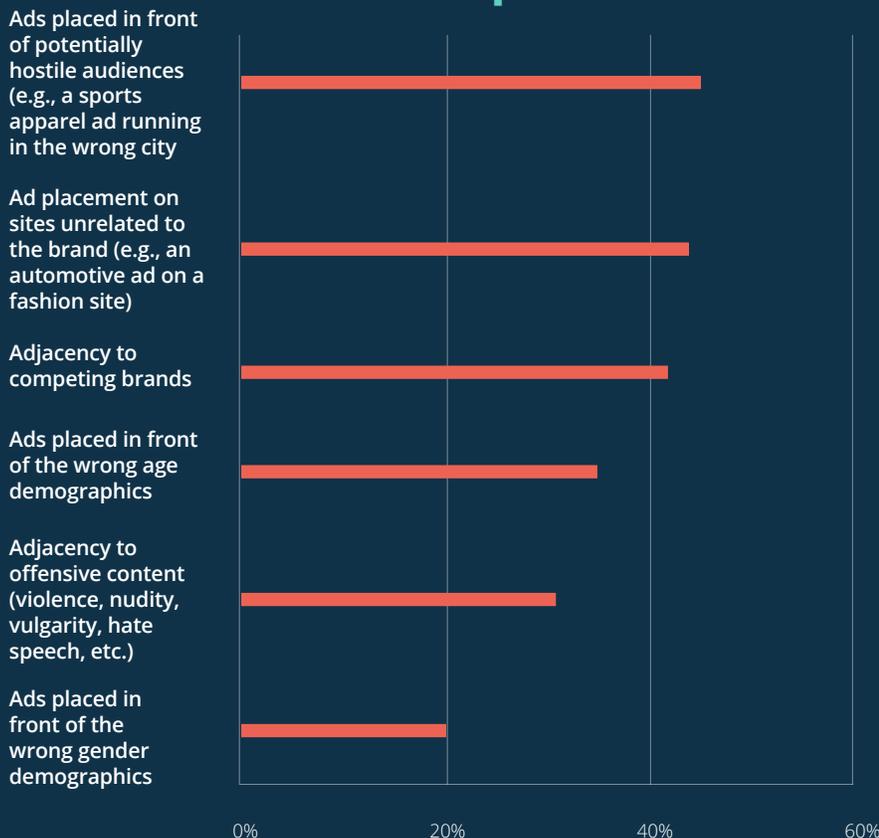
A near-majority of marketers have experienced a negative brand suitability episode.

Negative Episodes



Nearly half (49 percent) of digital media professionals said their organization had already experienced at least one negative experience regarding brand suitability — 11 percent experienced in the last year alone.

Types of threats brands have been exposed to



Moreover, numerous types of hazards had landed in their path. “Ad placements on sites unrelated to the brand” and “Ad placements in front of potentially hostile audiences” were the most common types of exposures. But several others were close behind.

The responses make it clear that there are a number of different threats that brands need to stay on top of.

Brand suitability threats carry brand suitability consequences

Why are brands bringing such a focus to brand suitability issues as we move closer to 2020? What's at stake?

That's the heart of the matter. Of the marketers who reported exposures to brand suitability issues, many reported negative impacts to their brand image or even their bottom line.

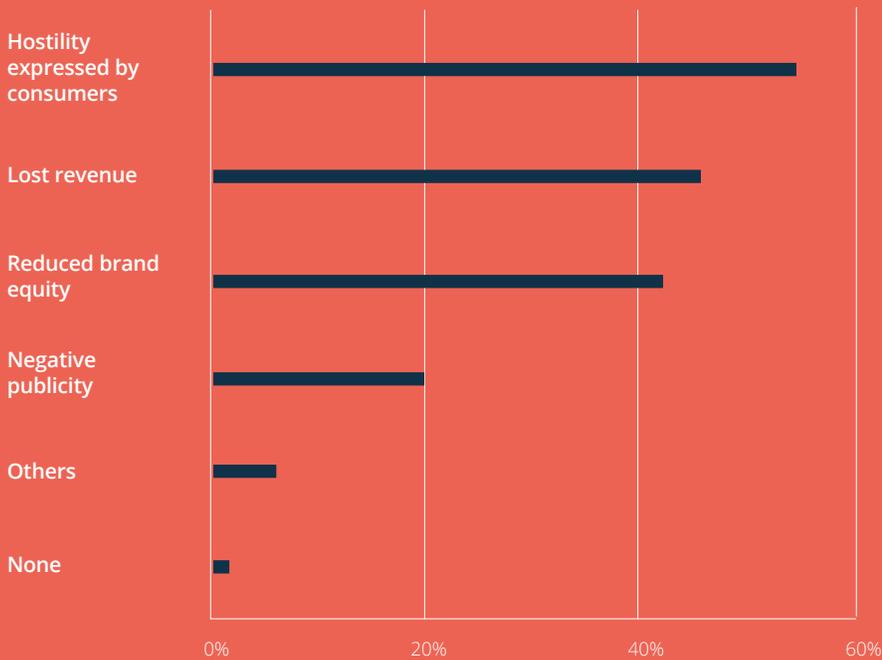
54%

Reported that they'd experienced hostility expressed by consumers as a result of such incidents.

44%

A highly significant 44 percent said they'd lost revenue due to such incidents.

Consequences



Other consequences reared their heads as well, including reduced brand equity (42 percent) and negative publicity (20 percent).

Ultimately, digital media pros indicated that they've experienced a perfect storm of negative consequences, enduring not only consumer hostility, but accompanying blows to brand equity and publicity. Individually, any of these issues can weaken a brand's revenue and overall image. Experienced in conjunction, that impact can be even more dramatic.

The lesson is clear: When brands suffer negative brand suitability episodes, consequences are dire, leading to both revenue loss and brand equity decline.

Some marketers are taking steps to guard against future exposures

A wide variety of technological and tactical solutions are available to marketers who are worried about brand suitability exposures, but a majority of marketers have not been using them.

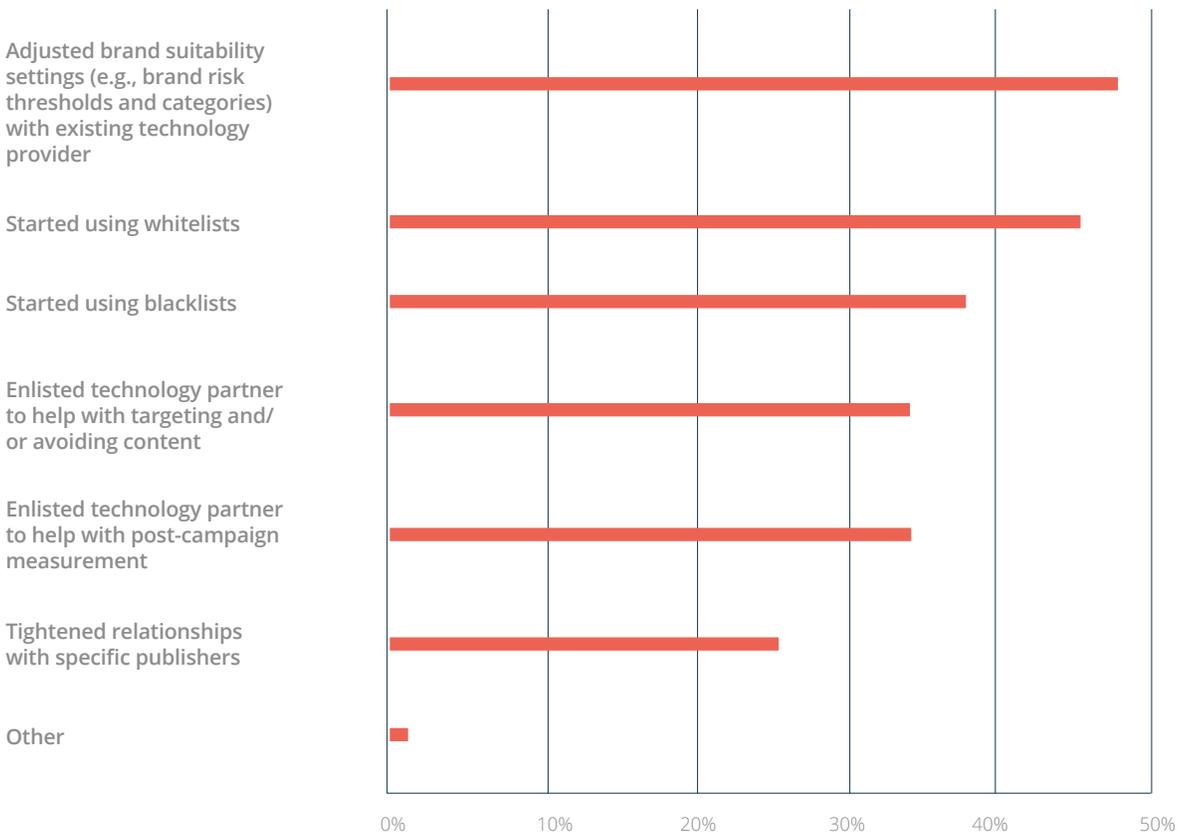
The fact that none of these solutions rise above 50 percent adoption is likely because many marketers are using more than one solution, rather than consolidating with a single partner.

In fact, it's striking that none of these tactics has gained enough currency to be adopted by an absolute majority of digital media pros — or even a

majority of those who have already faced consequences. This is even more surprising given that so many of those surveyed reported that negative brand suitability episodes had led to direct revenue consequences or reputational damage.

The most widely-used tactic — adjusting suitability settings with an existing provider — is arguably the path of least resistance. It enables digital media pros to focus on a provider that has the best capabilities in both safety and suitability, ensuring that they'll be covered across the board.

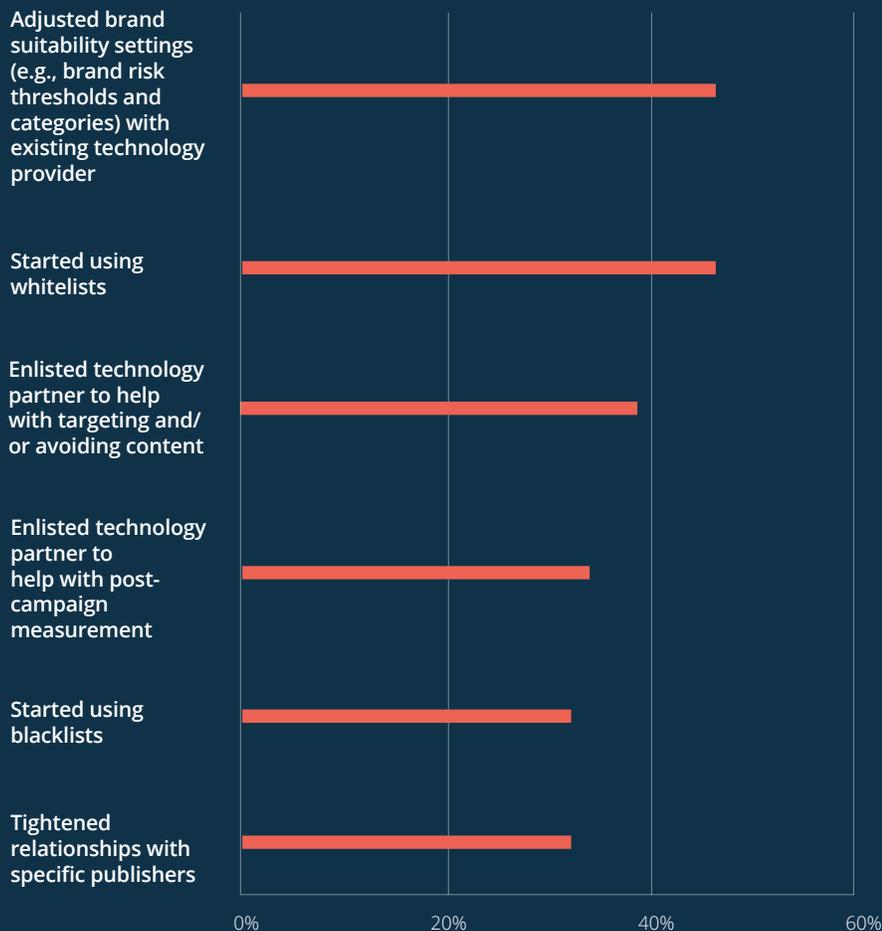
Reactive solutions



The picture looks similar when it comes to preemptive solutions

We asked all respondents (not just the ones that had been exposed to brand suitability threats) what their organizations had done to preemptively deal with brand suitability issues. The result was quite similar to those regarding reactive solutions:

Preemptive solutions



Once again, we see an evenly distributed array of responses with no absolute majorities. Moreover, the specific solutions being used are highly similar to the results reported by those who were working in response to specific threats.

Regardless of personal experience, marketers don't seem to be taking highly varied approaches. As we have noted, this can lead to dire consequences.

It also remains surprising that, either reactively or preemptively, no individual tactic or solution is garnering usage from the majority of digital marketers. Of course, given that respondents heavily signaled that they intend to focus more on brand suitability issues in 2020, these figures will likely tick upward in the coming year.

Who's responsible for leading the brand suitability charge?

Our survey posed two simple yet important questions to industry professionals: "As things stand now, who is most responsible for ensuring brand suitability?" And: "Ideally, who should be most responsible for ensuring brand suitability?"

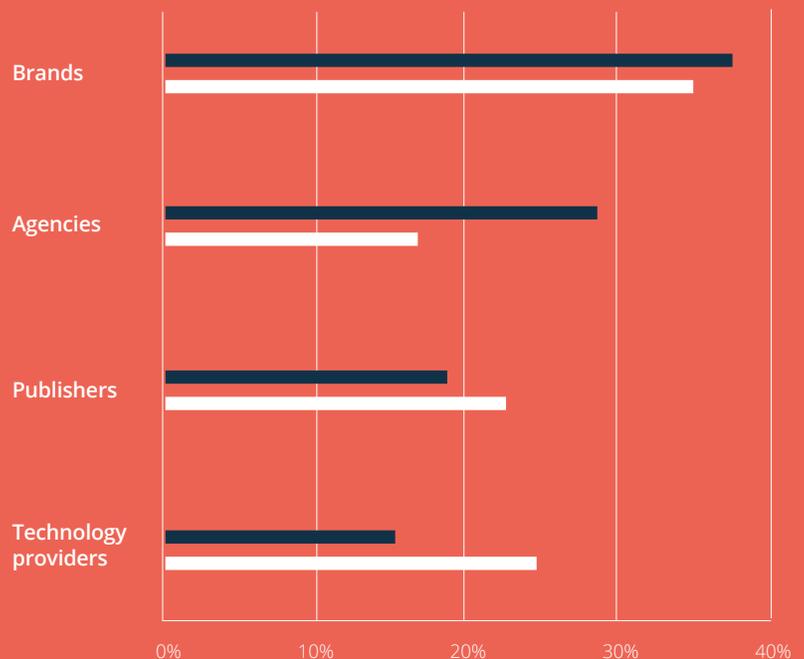
In neither case did anything resembling a consensus emerge.

It's clear that a solid percentage of respondents believe technology providers should further empower marketers in their effort to enhance brand suitability for their campaigns. Moreover, it seems that some respondents believe agencies are currently handling too much of the load. And brands, of course, bear much of the responsibility for their own destiny.

However, the figures may point to something else: **Every major player in the digital ad market bears responsibility for guaranteeing brand suitability.** If that weren't the case, it seems certain that survey participants would have broken more heavily toward one or two specific choices when asked who should bear the most responsibility.

Who is currently most responsible for ensuring brand suitability and who should be responsible?

■ Currently responsible ■ Should be responsible



Conclusion

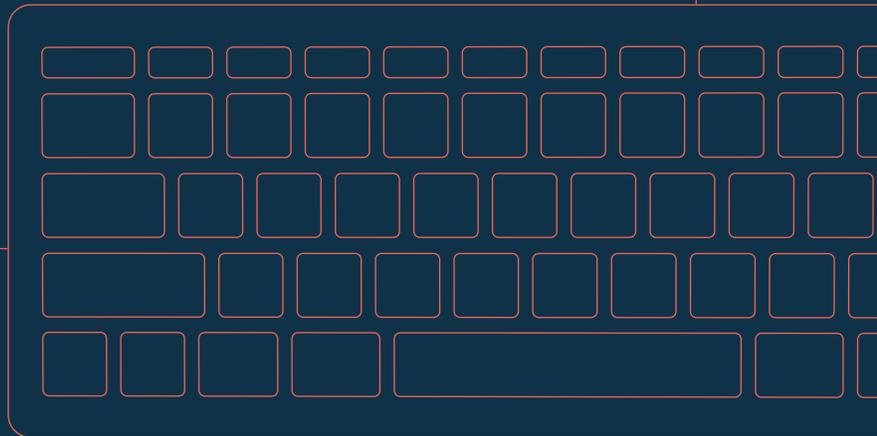
Brand suitability is not the responsibility of any one type of company. If it were, we wouldn't have received such a jumble of sentiments about who was (or should be) most responsible for addressing it. If brand suitability threats are to be addressed and solved, everyone in the digital marketing ecosystem needs to think about how to go about it.

And the time is now.

Over the course of our research, digital marketers indicated that they think heavily about brand safety and suitability issues. And while there may be some lingering confusion among some marketers about what the differences are, and about which solutions work best to address the respective issues, that confusion is fading. A solid majority of marketers indicate that they know which is which, and that they're already taking discrete approaches to both problems.

Most importantly, it is urgent for marketers, publishers, and ad tech firms to understand that a dramatic shift is underway. Marketers told us, explicitly and in great numbers, that brand suitability is a rising concern. By next year, in fact, they say that brand suitability will be just as pressing a priority as brand safety.

Digital marketing is facing a pivotal moment. Industry pros will have to meet these shifting winds before brands lose more money and more customers. And, as our research makes abundantly clear, they'll have to do it now.



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