BRAND SAFETY

A PLAYBOOK FOR MARKETERS

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groupm

TO BUILD BRAND LOVE YOU NEED BRAND SAFETY

While brand safety offers tremendous opportunity for advertisers and brands today, risk for each abound.

Viewable ads that make quality impressions are ones that are seen by real humans within the target audience, served in a safe, suitable and fraud-free environment. After all, an ad that cannot be seen has no value. And it's this quality within these appropriate parameters that delivers better performance.

GroupM and IAS have already produced studies in France and the Nordics proving exactly that. The French study showcased that when campaigns use pre-bid segments for brand safety, viewability and fraud, 15% of the budget was allocated to better quality media.[1] In the Nordics, the study conducted in partnership with Toyota, Radisson Blue Group and Kvik proved that viewable ads had an online conversion lift of 83% (brochure downloads tracked), 67% (room bookings tracked) and 79% (in-store visits)[2], respectively.

GroupM has participated in or led every industry initiative to enhance the integrity of digital advertising worldwide, continuously adapting to and improving the digital supply chain to create the safest and most effective environment possible for our clients.

Our high standard for brand safety best practices has afforded us the opportunity to work closely with industry partners to devise shared technology solutions and establish measurement frameworks and standard definitions.

But, as consumers continue to evolve in how they consume content, there is an opportunity to push the envelope to create an even safer online world.

The advertising industry is one of the world's most dynamic, ever-changing and vibrant industries. It is always striving to find better ways to engage with users through new channels and media, in addition to new solutions to connect with consumers through technology. That requires brand safety to evolve equally as fast.

As such, it is GroupM's privilege to work in concert with our clients to navigate these risks in order to make advertising work better for people.

Traditionally, brand safety risk was limited to digital—programmatic and social. Now, with established media digitizing and reinventing themselves, opportunities to improve brand safety practices are appearing across new avenues. Combined, these factors yield new challenges for established media and old challenges for new media. But there is opportunity to be found with every obstacle. Brand safety is a complex, nuanced matter and will continue to evolve in the years ahead.

In this report, we aim to look at what the future may hold. We begin with an overview of political, social and technological shifts impacting brand safety at a high level. We then look to specific challenges in five categories currently undergoing rapid transformation: Connected TV, Digital Out-of-Home, Location Data, Audio and Gaming.

1. POLICY SHIFTS such as GDPR and CCPA, among many others around the world, have created a seismic ripple throughout the industry, the full effects of which are yet to be felt. As old measurement methodologies such as third-party cookies fall away, the industry has an opportunity to collectively create better standards.

2. THE COVID-19 PANDEMIC has established a 'new normal' 'digital first' lifestyle for the majority of the global population. Consumption habits have changed (more news, gaming and streaming content). Where consumers go, advertising follows and, with it, new opportunities to strengthen brand safety measures arise. Aggressive keyword avoidance demonetizes online news as the audiences increase and at a time when the public needs reliable information. Local news faces an existential crisis.

6. DIGITAL OUT-OF-HOME is set to grow more advanced and complex as programmatic buying becomes more commonplace. While out-of-home has long been used for broad awareness, it remains an open question as to whether brands will have— or need—access to more granular targeting and measurement solutions.

7. PRECISE LOCATION DATA is a sensitive issue that will require additional due diligence. The development of location verification services and aggregate learnings could mitigate some risk unless personal data becomes less available.

8. AUDIO is growing as streaming music and podcasts become further entrenched in consumers' lives. Currently, advertiser controls are in their nascence, and brand suitability/adjacency remains a concern, particularly in the world of podcasts, where content standards remain loose across the board.

10 THINGS YOU NEED TO KNOW ABOUT BRAND SAFETY TODAY

3. FAKE NEWS and technologies that create deepfake videos are growing more sophisticated and threaten to further erode institutional trust. Brands must be more proactive than ever in preserving their core assets and demand transparency in all transactions.

4. TOO MUCH BRAND SAFETY is also a concern. As brands work to preserve their equity and authenticity, they should beware of becoming overly cautious. Doing so may decrease the impact of overall performance.

5. CONNECTED TV promises to command a larger share of budget in the coming years. However, measurement is fragmented across devices and publishers. Brands should demand greater transparency and interoperability among key players.

9. GAMING presents a huge opportunity in terms of audience, but brands must navigate a vast landscape of platforms, titles, player personalities and publisher relationships. Esports continues to grow in popularity, but brands must be aware of adjacency risks (violence and language, particularly). If people continue to stay home in the aftermath of the coronavirus, gaming audiences will retain some of the recent, rapid growth.

10. FUNDAMENTALS STILL MATTER. As brand safety continues to shift and evolve with media and technology, brands must not lose sight of established best practices, which serve as a vital North Star in uncertain times.

WHAT'S IN THIS PLAYBOOK?

BRAND SAFETY TODAY

AN OVERVIEW OF POLITICAL,
SOCIAL AND TECHNOLOGICAL
SHIFTS CURRENTLY IMPACTING
BRAND SAFETY AT A MACRO LEVEL

cookies
measurement
deepfakes
audio
gaming
digital
tv

THIRD-PARTY COOKIES ARE BEING DEPRECATED

The EU's General Data Protection Regulation (GDPR) came into force in 2018 and, while it disrupted the digital advertising industry, many believe that the true disruption may be provoked by the yet-to-be-adopted ePrivacy Regulation.

The regulation foresees — in some of its forms — default blocking of all third-party cookies at the browser level and establishes browsers as the ultimate consent management platforms. Anticipating this regulatory development and motivated by privacy considerations and changes in user behavior, Firefox and Safari started blocking third-party cookies a year ago and Google announced Chrome would join the choir in two years' time. The U.S. is anticipating its own federal privacy regulation, propelled by the California Consumer Privacy Act (CCPA).

The demise of third-party cookies, though, is due to the regulatory pressure the industry is facing, starting in Europe where ad tech has been subject to regulatory guidance or deep-dive investigation. It is also an inevitable technological development driven by a change in consumer habits and technology adoption (moving toward smartphones and other connected devices).

But, while the death of the third-party cookie has been getting a lot public attention, it is only part of a broader transformation the industry is going through. New capabilities will open new advertising channels and data sets for advertisers. With new rules on how data is used and how ads are delivered and measured, execution and measurement of primary media investments will also change.

The industry has already started looking into different solutions to continue to reach the right consumers and optimize media spend. Many of them rely on more privacy-friendly solutions like "clean room environments" (secure environments in which no granular data access is possible) or innovative machine learning techniques like federated learning (applying machine learning models to consumer data without leaving their device).

These new methods, although imperfect, would allow advertisers to receive aggregate reporting about campaign performance while complying with the relevant regulations.

AND INDEPENDENT THIRD-PARTY MEASUREMENT MAY BE ON ITS WAY OUT, TOO

A potential pitfall may be the downfall of independent, third-party measurement. GroupM, however, remains committed to privacy-enabled independent measurement and will continue working closely with our partners to address this issue. Not only is this important for brand safety, but it's also necessary to uphold simple, yet crucial, transparency about what inventory advertisers bought and how their campaigns performed.

Simply put, if measurement companies cannot access data directly and can only gain access to already-processed aggregate data from the publishers themselves, measurement may stop being impartial. While it may appear that this problem is limited to audience verification, content verification may not be exempt if content categories or URLs are seen to be revealing personal data.

Complying with new data protection regulations is complicated by companies across Europe having to navigate confusing guidance and conflicting interpretation from Data Protection Authorities. This not only yields additional compliance costs for companies, but the different levels of protection will be confusing for consumers.

Finally, it would be misleading to assume that data protection compliance becomes easier as third-party cookies disappear. It is important to recognize that data processing is not limited to cookies.

The deprecation of third-party cookies is an opportunity for the industry to forge a new and more collaborative privacy-enabled future. To do that, the industry must find a new way to steer the right advertising to the right people, moving away from existing identifiers and creating new, privacy-friendly ways to advertise.

FAKES ARE PROLIFERATING, AND GROWING MORE SOPHISTICATED

The trend of online disinformation, otherwise known as fake news, has been dominating news headlines since 2016 with no signs of slowing down. The online disinformation actors are particularly active during election periods and, as we enter into the final stages of the U.S. presidential campaign, we are likely to see more of it. The fear and uncertainty stemming from the COVID-19 pandemic has also paved the way for bad actors to promote and benefit from online disinformation.

The industry has played its part by devising many solutions, including new artificial intelligence-driven technologies to recognize fake news and by establishing partnerships with fact-checkers and journalists. But now we face a new and disturbing danger emerging from the depths of the dark web: deepfakes. Through the use of machine learning technology, pictures, videos and voice recordings of a person can be ingested and then, most often fraudulently, manipulated into a deepfake video or audio recording.

Apart from obvious misuse for political purposes, deepfakes can be used to misrepresent senior representatives of any company making public statements that could not only influence a share price, but erode any other communications effort deployed by the company. Disinformation in general can also be used to spread harmful rumors about brands that serve to damage their image.
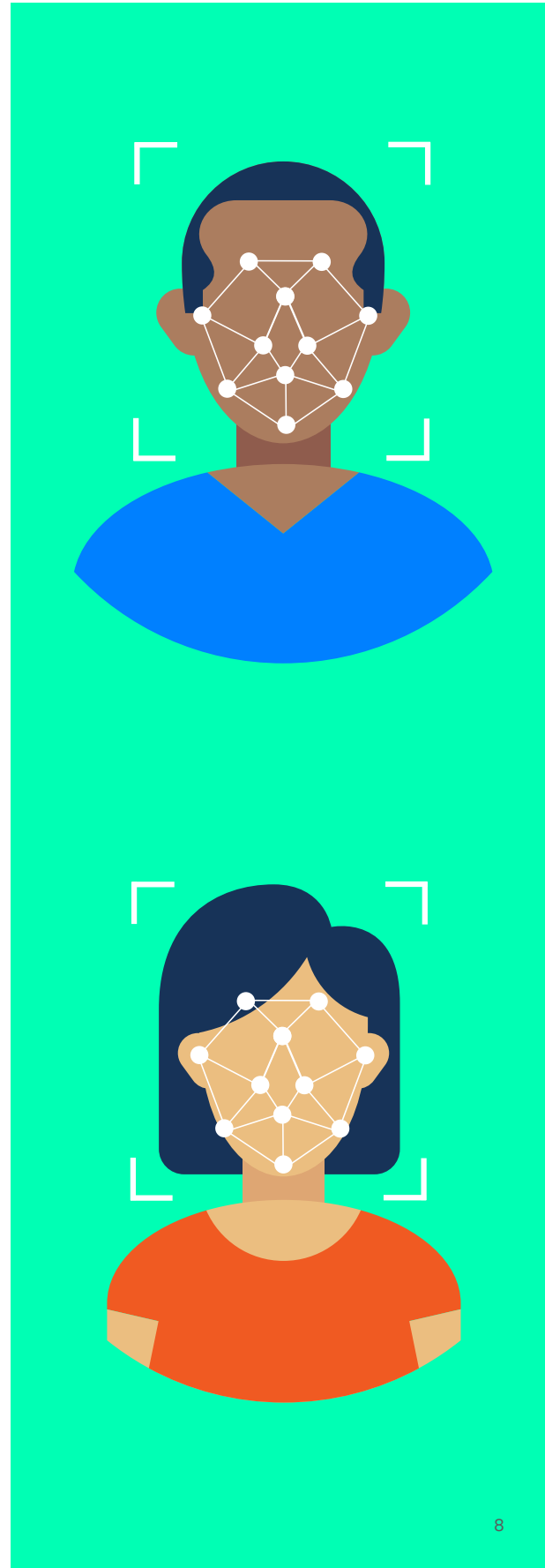
COMPUTER VISION, BLOCKCHAIN & BIOMETRICS MAY TRANSFORM TRANSPARENCY

The promise and appeal of new technologies to help us address inappropriate adjacencies, fraud or transparency remain strong. While the artificial intelligence models are successful in helping to identify IP-infringing content or spam, identifying online disinformation or hate speech remains a challenge. Human contempt has many nuances that have eluded technology up to now and detection relies heavily on human review.
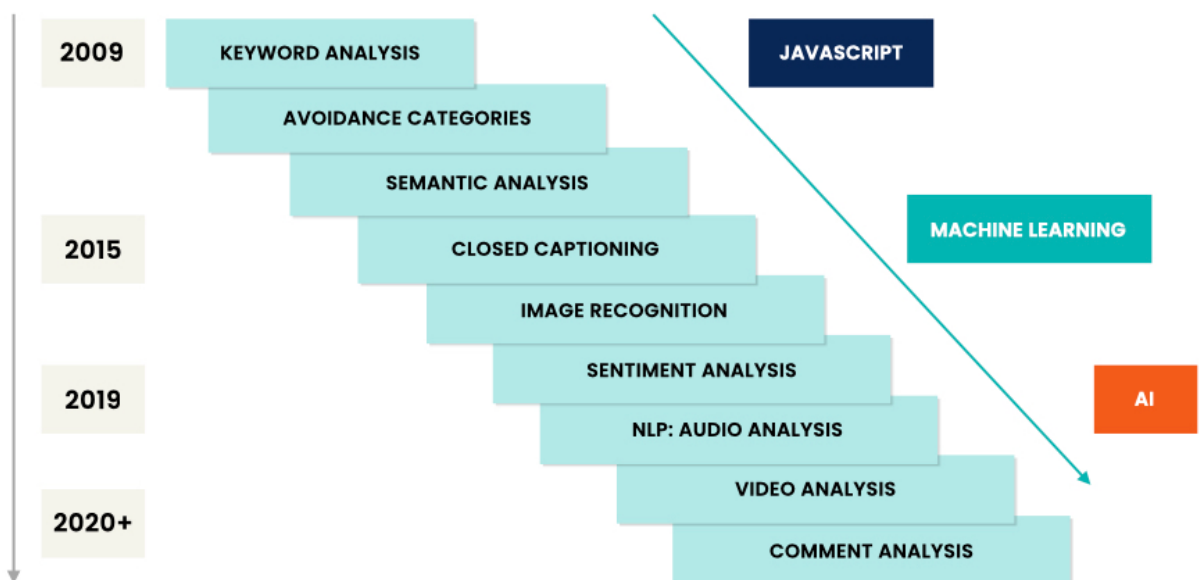
As technology evolves, we are hopeful that nuances and human bias will become more identifiable. Machine learning has driven a revolution in content analysis, evolving the practice from simple keyword avoidance to sophisticated sentiment and semantic analysis. Still, most video content evaluation is conducted via metadata and audio file analysis. In 2020, true computer vision that can see images and process video exists only within bespoke video players and the biggest social platforms. Even then, it cannot yet be processed at adequate scale and speed.

On a different note, there is early evidence that blockchain can help deliver better transparency to ad placement and distribution of ad spending. Tests run in the U.K. and the U.S. promise to deliver the first blockchain-powered insights into media buys.

Voice- or facial-recognition verification technology will be discussed and tested in months and years to come that will lead to a whole new set of ethical and regulatory debates about processing of biometric data, even just to fight fraud.

CONTENT ANALYSIS : STEADY PROGRESS

2009	KEYWORD ANALYSIS	JAVASCRIPT
	AVOIDANCE CATEGORIES	
	SEMANTIC ANALYSIS	
2015	CLOSED CAPTIONING	MACHINE LEARNING
	IMAGE RECOGNITION	
2019	SENTIMENT ANALYSIS	
	NLP: AUDIO ANALYSIS	AI
	VIDEO ANALYSIS	
2020+	COMMENT ANALYSIS	

NLP: Natural Language Processing

THERE IS SUCH A THING AS TOO MUCH BRAND SAFETY FOR NEWS PUBLISHERS

For the past several years, global marketers have been focused on reducing their brand safety risk by adopting a range of policies, tools and tactics. There is now a concern that some advertisers have taken excessive brand safety measures, which may be negatively impacting reach, performance and the health of diverse, newsworthy, legitimate ad-supported environments.

During the coronavirus pandemic, many advertisers want to avoid being associated with any related content, whether positive or negative, and publishers have been vocal about the significant demonetization of news as a result.

Such revenue losses should be put in the right context. For over a decade, algorithmically driven social platforms have led to a mass exodus of advertising revenue from the pages of many online and print publications. And, as people continue to use social platforms as virtual newsrooms, advertising investment follows them. This has severely impacted news publishers' ability to afford to place sufficient journalists on the ground, especially in local communities. Many have been forced to fold up shop, merge with other publications, or severely reduce their reporting staff.

Aggressive use of avoidance technology has taken much of the blame for news demonetization. This technology ensures that when ads are bought programmatically, there are parameters in place to ensure brand safety because adjacency to controversial news is an emotionally charged issue and marketers, understandably, want to protect their brands. Since the majority of stories in credible publications are focused on the pandemic during the crisis, semantic avoidance practices have led to decreased revenue for publishers at the time they are most needed. This led to a GroupM brand safety recommendation for clients to limit COVID-19 avoidance to negative associations, like death counts, mortality rates, etc. By focusing on positive associations, we can support credible news publishers and deliver quality reach to our clients. GroupM has long advised clients against any blanket blocking and has worked with industry bodies, such as IAB U.K., to provide best practice guidance on how to use avoidance technologies appropriately.

Semantic avoidance technology is not the enemy. These technologies can actually make it easier for advertisers to support news by enabling each marketer to identify their own sense of brand suitability. The issue is how this technology is being used.

There are simple ways to advertise in news without compromising brand safety, but to avoid hard news, or even bad news, flies in the face of the facts.

Recent IAS research suggests that most people do not think negatively of brands for advertising in a "hard" news space provided the creative messaging is appropriate.[3] Additionally, Newsworks' research shows the average dwell time for any one person is 1.4 times higher in a hard news environment.[4] That same research shows there is 50% higher engagement rate on premium editorial sites than during free browsing.[5]

Beyond the increased audience rationale, credible media outlets are inherently safer for brands. News publishers with journalists plugged into their local communities, who fact check and use technology to manage quality and safety, offer brands a safe, high viewability, low ad fraud advertising environment. GroupM Premium Supply and media teams work with reputable and trusted international, national and local news publications to present their value to our clients. Moreover, GroupM recently added 2,300 credible, local news publications to our U.S. inclusion list, and we are looking to further enrich inclusion lists in other markets.

Outside of articles focused solely on death, death tolls, miracle cures and virus-related disinformation, there may only be minimal risk associated with advertising in today's news environments. Most marketers agree, but sensitivities will always exist.

Marketers should reconsider blocking news and utilize their available brand safety experts to help determine their appetite for news scale. If hard news is a worry, there are viable alternatives; using news may be fine with a light level of support for hard news. It's also important to evaluate the large and loyal audiences drawn by sections like entertainment, food and sport.

If using an avoidance strategy, consider how it is being used. Take into account the keywords or categories that are being excluded and how this may influence the campaign and disadvantage high-quality, legitimate publishers.

Now is the time to reconsider the avoidance of advertising in the news. There is a lot riding on this.

A CLOSER LOOK AT KEY OPPORTUNITIES FOR IMPROVED BRAND SAFETY MEASURES IN SPECIFIC MEDIA

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CONNECTED TV

TELEVISION AS WE KNOW IT EVOLVES ONCE AGAIN

Connected TV (CTV) is a rapidly growing segment of the television industry. While definitions are often fluid, GroupM estimates that it accounts for several billion dollars of annual spending in the U.S. Programmatically bought connected TV is much smaller, likely closer to $1 billion in 2020.[6]

eMarketer[7] projects nearly 200 million CTV users in the U.S., accounting for over 44% of digital video impressions.

MEASUREMENT:
DIFFERENT STANDARDS FOR EVERY DEVICE

The challenge is the multitude of ways CTV inventory is accessed by buyers: through devices, apps and content aggregators, many of which do not have the necessary markers for software development kit (SDK) inclusion. Therefore, measurement partners must be versed in multiple and often proprietary technologies and methods.

Consider that the mobile ecosystem requires integration with just two formats, iOS and Android. Estimates, though, range as high as 50 distinct formats in CTV (Firestick, Chromecast, Roku, Samsung, Apple TV, etc.). This challenge exists in China as well, where certain formats cannot be measured. In the meantime, Chinese device manufacturers agreed to work together to support data authentication and develop measurement methods. China Advertising Association developed an OTT SDK, which is currently being introduced to the market.

CTV is primarily bought three ways: direct from publishers (i.e.: CBSi, NBC, Hulu); from platform aggregators (i.e.: Samsung, Roku, Viant), where inventory is made available through specific device-based technologies; and via programmatic-buying platforms (i.e.: Xandr, The Trade Desk). GroupM bespoke media products such as Finecast, which can

deliver broadcaster and device integrations, audience segmentation, campaign management and reporting, are offered as a managed service. Risk is based on immediacy of access to the inventory, with direct or direct integration being preferable.

CONTEXT:
IT'S 10 P.M. DO YOU KNOW WHERE YOUR AD IS?

To protect their primary direct sales channels, many CTV publishers prohibit resellers from reporting on program or app-level placements for a given campaign.

The outcome can be startling, with clients' campaigns that were assumed to be running on premium broadcast-quality apps actually running on politically extreme content, UGC, foreign emanation and foreign language content and other low-suitability inventory like crimes caught on camera.

Further, content measurement is largely absent in CTV, and must be present to allow contextual targeting and avoidance and enable brand safety measurement and control. At the very least, sellers should be offering content categorization aligned with the IAB's Content Taxonomy and 4A's Brand Suitability Framework and Brand Safety Floor.

FRAUD:
BUYER BEWARE

Fraud in CTV is primarily born out of the access to inventory through exchanges, or where access is mediated through a third party. This can be particularly prevalent with long tail, small publishers or blind buys. In this way, it is emulating the issues seen in display and video environments.

With considerably higher CPMs, the stakes are increased and the potential for fraud could be greater. However, the opportunity for fraud is much reduced where there is a direct buy with a large, reputable broadcaster, or where there is a direct integration into the broadcaster ad server.

MECHANISMS OF FRAUD

- Spoofed apps (pirate sites or other low-quality content posing as legitimate publishers).
- Spoofed user agents (inventory running on PCs, tablets or phones masquerading as CTVs).
- Data center emulators.
- Bot-generated traffic.
- Malware-hijacked devices that run invisible ads in the background

HOW TO THINK ABOUT CONNECTED TV

CONNECTED TV
THE OPPORTUNITY

"After the COVID-19 stay-at-home, people's viewing behaviors will be changed. This could lead to more opportunities to talk to the right person based on location, interests, and within contextually relevant content."

CONNECTED TV
THE OBSTACLES

MEASUREMENT VARIES BY DEVICE, ADS CAN APPEAR TO SUPPORT CONTENT THAT DOESN'T ALIGN WITH BRAND VALUES AND FRAUD HAPPENS WITHOUT VETTING

CONNECTED TV
THE CHECK-LIST

1. Give preference to direct buys or programmatic inventory enabled with app-ads.txt.

2. Avoid audience extension and long-tail non-transparent placements.

3. Ensure contractual protection is put in place.

4. Utilize verification vendors that, at minimum, have achieved MRC mobile app SIVT and Viewability accreditation and are in process toward OTT accreditation.

5. Require third-party reconciliation against valid impression counts, as well as 100% app and show level transparency.

CONNECTED TV
FUTURE THINKING

As the evolution of CTV continues, we look forward to a continued maturing of the ecosystem, bringing deeper analysis and verification capability, enhanced transparency and common definitions:
- Industry standard pre-bid filters and blocking.
- 100% app-level transparency or ubiquitous audience reporting.
- Program-level reporting.
- Standardized inventory-naming conventions.

DIGITAL OUT-OF-HOME

WHEN PROGRAMMATIC MEETS THE GREAT OUTDOORS
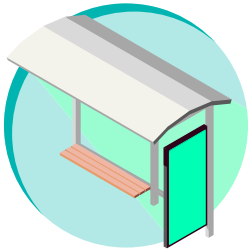
Out-of-home (OOH) media has long been considered an efficient and reliable brand-building vehicle, designed to turn heads when appearing in strategic places.

During the times of a worldwide lockdown, OOH has seen reduced spend. However, as the situation changes and people reclaim their outdoor lives and activities, OOH advertising will pick up in the medium and short-term.

GroupM China estimates that OOH has a higher daily reach than TV among users ages 15 to 45, ranking second only to the Internet as a massive media.[8] To showcase how important DOOH will be in the future multimedia-integrated world, some of the largest Chinese companies have been investing in DOOH inventory owners: Alibaba invested $1.43 billion in Focus Media, Baidu $300 million in Xinchao Media and Tencent an undisclosed amount in Tikin Media.

GroupM's investment in out-of-home is larger than its spending on Amazon and Twitter combined. While OOH has embraced digitization, nearly all available DOOH are closed systems that are not Internet-enabled—meaning no dynamic optimization and no ad serving, and independent third-party verification programmatic buys are in effect reservations, not real-time inventory.

FRAGMENTED SUPPLY: HOW TO CONNECT THE DOTS

Besides lacking true interactivity, the primary obstacle of the DOOH medium is fragmentation of supply, which does not allow integrated measurement and optimization (both are key to brand safety). In recent years we have witnessed the creation of supply-exclusive paths—media owners have either integrated or created their own SSPs, while integration of the leading DSPs is limited to a few supply partners. This development is

common for the nascent phase of any medium and DOOH is no exception.

Traditional display and video campaigns are measurable at a user level, while the nature of DOOH forces us to measure at the level of one screen to many users. How can a buyer ascertain what kind of demographics will be exposed to the DOOH ad? Apart from traditional contextual placement (i.e.: luxury products in affluent areas), two main methods are used to establish the quality of the audience: location tracking combined with other behavioral data, sourced from users' personal devices; and a panel-based impression multiplier (i.e.: in the U.K. through the Joint Industry Currency panel Route). In certain markets, GroupM's Kinetic created its own audience platform, "Journeys," to better value impressions and to do so across publishers.

Understanding the precise location of people and matching this to DOOH execution can be valuable, but as we outline later in the report, it comes with a need to do due diligence with privacy regulations.

Independent verification technology is still not the standard way of doing things in OOH; rather, it is an exception. When assessing whether a campaign has been delivered, brands and agencies rely on media owners' self-reported figures, unless there is an industry-accepted delivery currency such as Route in the U.K. or Geopath in the U.S.

And finally, let us not forget contextual brand safety. While less of a concern in DOOH, in the absence of any independent verification, buyers still have to rely on sellers' technology to prevent DOOH placement in inappropriate locations (i.e.: a sugary food ad next to a school or an ad next to a billboard with a competitor's ad). For the moment, most of DOOH is planned site by site, so contextual adjacency can be managed. However, as programmatic in the space grows, inappropriate adjacencies will become more of an issue. While in certain countries these may be only inappropriate placements, in other countries these may be illegal; hence, additional due diligence is needed.

HOW TO THINK ABOUT DIGITAL OOH

DIGITAL OOH
THE OPPORTUNITY

"Seeing the way China's invested in out-of-home media owners makes an intriguing case for my brand to be back outdoors too."

DIGITAL OOH
THE OBSTACLE

FRAGMENTATION LEADS TO MEASUREMENT COMPLEXITY

DIGITAL OOH
THE CHECK-LIST

1. Apply client's risk tolerance profile to DOOH campaign-planning specs and buy-type selection (direct, platform, or programmatic).

2. Manually vet every supplier for due diligence undertaken to enable only appropriate ad placement and implemented fraud-mitigation tactics.

3. Ensure contractual protection is put in place.

4. Conduct due diligence of any data sets applied by the inventory provider/platform to ensure compliant and appropriate data collection practices.

5. Monitor and report on delivery and evaluate buys against pre-established quality criteria.

DIGITAL OOH
FUTURE THINKING

Many individuals and companies across WPP and GroupM are already engaging with the industry to promote more accountability in DOOH. We believe that the future of accountability and transparency in DOOH lies in three key principles:
- International standardization for audience, viewability and fraud measurement.
- Global privacy principles to uphold.
- Omnichannel approach.

LOCATION DATA

GETTING THE PRECISE & PERSONAL TOUCH JUST RIGHT

In a world where we are glued to our personal mobile devices, precise location data is revolutionizing retail, quick service restaurants, fast-moving consumer goods and franchise-based target marketing. Knowing exactly where a person is (or was) at a given time impacts targeting, offers, creative, conversion and attribution—virtually every element of digital marketing communications.

COMPLIANCE:
EXTRA DUE DILIGENCE REQUIRED
As investment in location data has grown, the need to verify the accuracy and precision of that data has grown as well. GroupM has spent nearly two years evaluating location-verification services and crafting GDPR and CCPA-compliant terms and conditions that seek to confirm our partners collect and use location data appropriately, and to ensure they pass us no personal data in performance of their service offering.

Precise location data is considered by many data protection regulators to be very sensitive. Knowing people's exact location and combining it with their interests may result in even further sensitive data points. Any advertiser working with companies processing precise geolocation data must undertake additional due diligence of their vendors' compliance efforts.

The solution may lie in using aggregate learnings, as it is the case today, to mitigate some of the risk. It remains to be seen how well this technique will develop, as we see less and less personal data made available for campaign measurement. This kind of use of location data is further made difficult due to an often-perceived lack of scale and availability.

HOW TO THINK ABOUT LOCATION DATA

LOCATION DATA
THE OPPORTUNITY

"When people share their location, our brand can talk with them in a way that adds much more value. When you get it right, you can create a meaningful moment in the right place that people truly appreciate."

LOCATION DATA
THE OBSTACLE

PERFORMING ENOUGH DUE DILIGENCE TO KEEP CONSUMER DATA AS PROTECTED AS POSSIBLE

LOCATION DATA
THE CHECK-LIST

1. Never buy audience segments where the source of location data is unknown or undisclosed.

2. Confirm all location data partner selections are vetted by GroupM and approved by the GroupM Data Partnerships team.

3. Consider adding a location verification service on all campaigns targeting location, especially with limited geo-fenced target areas.

4. Ensure a high measure of due diligence with local privacy regulations.

LOCATION DATA
FUTURE THINKING

- Regulatory clarity around the use of precise location data will drive adoption of location verification.
- Continued mergers and realignment of players are creating more capable, scalable partners.
- The pursuit of a privacy compliant universal ID is at odds with existing and developing browser and app OS makers' progress toward greater personal data protection.

AUDIO

THE LOUD RETURN OF A CLASSIC FORMAT

Digital audio is growing fast among both consumers and brand advertisers. Adobe reports that 25% of consumers plan to listen to even more podcasts and other digital audio formats than in the past.[10]

Spotify has 271 million monthly active users, out of which 124 million are subscribers.[11] In 2020, Germany and France are likely to experience 20% growth in digital audio ad spending.[12]

Podcast ad spending is projected to double to $1.6 billion by 2022.[13] The same study estimates that 78% of listeners do not mind ads as a means of supporting podcast content.

ADJACENCY:
WHICH SOUNDS SURROUND YOUR MESSAGE?
The nature of adjacency in digital audio may be disputed, as ads are usually placed in commercial breaks. Nevertheless, brands may beg to differ, as even the audio type of adjacency may not be brand-safe or suitable.

Some popular music genres have songs featuring explicit lyrics. Because news items by nature contain accounts of conflict, terrorism, sex, violence, political and sensitive social issues, ads could be broadcasted or streamed "adjacent" to the content.

Furthermore, a podcast may host "edgier" and/or more provocative content and use such language to keep audiences entertained, as it is limited to words and lacks visual aids to convey intended messages. Finally, the prevalence of children in the audience must always be observed.

Controls to evaluate this type of content and choose where to place ads are limited, as are platforms' ability to report on the delivered ads and their "audibility" (i.e.: "ads that had the opportunity to be listened to").

[10] Adobe, Perspective on Digital Advertising, March 2019; [11] Spotify, December 2019;
[12] eMarketer, September 2019; [13] WARC, Global Ad Trends, April 2019

21

MEASUREMENT:
IF THERE'S AN AD IN A PODCAST, BUT NO ONE'S THERE TO HEAR IT...

When audio is delivered over a streamed source, delivered impressions can be tracked and verified using ad tagging. Click-through, last-click and post-listen are the most precise key performance indicators for streaming audio.

The placement of the ad tag within the audio unit can vary; however, among some of the leading streaming platforms, it has become standard to fire the ad tag at the end of the audio unit, confirming that the listener remained connected for the duration of the ad.[14]

Podcasts still lack real-time audience metrics, making it difficult to tell if ads are getting skipped over. This type of measurement is particularly important, as it can serve as a proxy for fraud identification. Furthermore, third-party verification in this space remains scarce and in very early stages of development.

CONTROLS:
STILL IN THE EARLY STAGES

Nevertheless, certain levels of targeting as a proxy can be used—language, geographical area and gender. Platforms like Spotify do offer their own proprietary controls, which allow advertisers to pick and choose categories they do not want their ads to run next to.

[14] IAB, Digital Audio Buyer's Guide, September 2018

HOW TO THINK ABOUT AUDIO

AUDIO
THE OPPORTUNITY

"Audio is intricately linked to our minds. Music can change our mood and a good podcast can keep us sitting in our driveway. It's a great place for a brand to create an emotional connection with people."

AUDIO
THE OBSTACLE

PLANNING FOR ADJACENCY, MEASUREMENT AND HOW USER CONTROLS MIGHT SHRINK MY POTENTIAL AUDIO AUDIENCE REACH

THE CHECK-LISTS

DIGITAL BROADCASTING & ON-DEMAND STREAMING

1. If working with platforms or managed services, validate their internal processes used to determine safe and suitable content that is subject to monetization.
2. Ensure that either DSPs you use to buy programmatically or platforms' or content producers' IOs have agreed to protective Terms and Conditions.
3. Use any available audience targeting, especially age and geotargeting (to avoid reaching children when not needed).
4. Exclude any brand-inappropriate content verticals (i.e.: news, gossip), programs or keywords.
5. Ensure that clients' brand guidelines and legal requirements are followed (i.e.: do not advertise alcohol in a broadcast targeting primarily teen audiences).

PODCASTS

1. If working with managed services, ensure that they conduct a thorough check of the podcasts they choose to represent.
2. Before deciding to invest in a certain podcast, research the podcast and the creator to ensure they have not been tainted in the past.
3. Vet the content and ask for transcripts whenever possible to ensure the content is appropriate for the client.
4. Ensure that clients' brand guidelines and legal requirements are followed (i.e.: do not advertise alcohol in a podcast targeting primarily teen audiences).
5. Use age targeting whenever available.

AUDIO
FUTURE THINKING

As the consumption of digital audio grows, we are likely to see greater brand interest. In order to address some of the shortfalls of the medium, the industry should look toward:
- Full cross-platform standardization.
- More robust third-party verification.
- Horizontal integration of inventory offer.

GAMING

GET INTO GAMING BUT DON'T GET PLAYED

The appeal of gaming is now almost universal, with 86% of global Internet users reporting that they play games on at least one device.[15] This continued growth will be, in part, due to standards like Machinima, gaming consoles, console game producers and newer entrants like Google's YouTube and Stadia, Apple Arcade, Snap Games, Amazon's Twitch, Microsoft's Mixer and Xbox, Facebook Watch and Facebook Games, ESPN and VENN.

The unique circumstances created by the COVID-19 pandemic is also translating to increased time spent gaming. eMarketer reports that gaming is up 28% among adults in Germany, 59% of American men are using their gaming consoles more, 25% of U.S. Millennials and Gen Z are watching esports as an alternative to live sports and 68% of Canadian adults are spending more time gaming. The growing demand has steered Facebook to launch a gaming app as well.

Consider that esports is a subset of the total gaming opportunity—there were 201 million global esports enthusiasts in 2019.[16]

Looking at the larger gaming world, the demographics and scale further expand, cutting across age, geography and gender. In 2019, the total value of the global games market is expected to have surpassed $152 billion, an increase of 9.6% year over year.

With the current scale and continued growth of time spent in gaming and esports, it is no surprise that monetization opportunities are growing as well.

MEDIA PROPERTIES:
SHOWING UP IN THE MIDDLE OF THE ACTION
Media companies have arranged for ad insertion within individual gameplay, streaming esports, reporting on the world of esports, platforms to view recorded gameplay, or within broadcast events.

[15] Facebook IQ, 3 global trends impacting the gaming industry, November 2019
[16] Wavemaker, Getting in the eSports game, August 2019

Common types of brand integrations with media properties include rewarded video, interstitials and banner ads.[17]

Anzu (a company partly owned by WPP) is able to assist brands to do programmatic in game advertising by leveraging standard ad formats. The company is also working with established third-party companies to measure viewability and fraud.

PUBLISHERS:
GETTING IN THE GAME

Publishers own the IP for game titles and control much, if not all, of the esports and gameplay ecosystem for each game. Examples include Blizzard, Electronic Arts, Riot Games, Sony, Tencent, King and Ubisoft. A collection of popular titles from these publishers include World of Warcraft, Madden, Grand Theft Auto, League of Legends, Candy Crush, Counter-Strike, PUBG Mobile, Overwatch, Minecraft and Fortnite.

The most common form of monetization includes brand integration/sponsorship contracted with the game publisher. A well-known example of this style of integration is the DJ Marshmello set in Fortnite, which was streamed concurrently by over 10 million people.

TEAMS & PLAYERS:
THE NEXT SUPERSTARS

Professional teams play competitively in various esports leagues/events and stream live or recorded gameplay. The most common form of monetization includes brand integration/ sponsorship contracted with the team or influencer marketing with individual players.

Adult language is sometimes used in live chat of viewers watching individual gameplay when streamed online. It is recommended to watch gameplay for the team/player to understand the average context for that community.

In respect to comment moderation, there is the risk of adjacency within livestreams. As far as contextual adjacency, the distribution format will dictate the potential. For example, the home screen of Twitch shows a number of video thumbnails, while gameplay has a comment but not context risk.

GAMING AND ESPORTS PRESENT UNIQUE CONSIDERATIONS FOR BRAND SAFETY

- **FRAGMENTATION OF THE EXPERIENCE ACROSS DEVICES, PLATFORMS AND PUBLISHERS**

- **LACK OF STANDARDS FOR MEASUREMENT**

- **THE CHALLENGE OF ACTIVELY MONITORING IN-APP ACTIVITY VERSUS WEB ACTIVITY**

- **THE POPULARITY OF LIVE-STREAMING AND LIVE CHAT, WHICH ARE CHALLENGING TO MONITOR EFFECTIVELY IN REAL TIME**

- **SUITABILITY/SAFETY OF GAMEPLAY**

PERCENTAGE OF PLAYERS WHO EXPECT TO INCREASE MOBILE GAMING TIME OVER THE NEXT YEAR (BY GENRE)[18]

Genre	
Real-time competitive action games	**36%**
Multiplayer role-playing games	**33%**
Sports games	**32%**
Racing games	**30%**
Augmented reality games	**28%**
Real-time strategy games	**28%**
Trivia games	**23%**
Arcade games	**22%**
Casino Games	**21%**
Puzzle Games	**15%**

HOW TO THINK ABOUT GAMING

GAMING
THE OPPORTUNITY

"eSports competitions award more prize money than Wimbledon. That means the right brand experience reached a devoted fan base that are also passionate players themselves."

GAMING
THE OBSTACLES

FRAGMENTATION, MEASUREMENT, MONITORING AND UNDERSTANDING THE SUITABILITY OF GAMEPLAY

GAMING
THE CHECK-LISTS

ENGAGING WITH MEDIA PROPERTIES

1. Use open web standards regarding contextual brand safety, ad fraud and viewability, where applicable.
2. When possible, leverage inclusion lists or, at minimum, exclusion lists for themes unsuitable for a brand advertised.
3. Pay special attention to in-app gaming inventory, as monitoring and measurement of adherence to guidelines can be challenging due to the low adoption of Open Measurement Software Development Kit (OM SDK).
4. Consider first testing exclusively in web or TV/OTT environments with standard ad formats to understand potential exposures.

ENGAGING WITH GAME PUBLISHERS

1. Since lead times can be long, products should have a significant shelf life. Depending on the format in which the game is delivered to players, no changes may be available after the development code is locked—so any considerations should be applied long term.
2. Identify which genre best maps to the brand values around suitability. While real-time competitive action games have the most projected time spent increases and are the fodder for many esports leagues, many of the titles simulate violence, sometimes graphically. Sports games, puzzle games and trivia games may be more friendly for audiences of all ages.
3. Since large licensing agreements tend to be required for this level of partnership, ensure that you understand how your brand can align with gamers and esports in a more turnkey way.

ENGAGING WITH TEAMS & PLAYERS

1. Just as you would for influencer marketing within social media, be sure to consider cost basis, category exclusivity, personal moral standards for the individual, proof of performance and whether the player is a brand fit.
2. Though commitments tend to be larger with a team or prominent player, you can test a "bounty board" program, offering all streamers on Twitch an incentive to interact with your brand during the broadcast. The lack of individual approval makes for a riskier (but lower) commitment and potentially larger-scaled program.

GAMING
FUTURE THINKING

Gaming is an exciting new avenue for many advertisers who want to use this opportunity and engage with their target audiences. The industry should be focusing on:

• Full cross-platform standardization of measurement and content metrics.

• Alignment on technology capable of assessing 3D environments.

• Developed and 3D-adapted cross-industry third party verification methodology.

CONCLUSION

GET BRAND SAFETY FUNDAMENTALS RIGHT & BUILD BRAND LOVE

There will always be an element of risk, particularly related to user generated content. In turn, we will continue to refine mitigation tools and strategy. Disinformation will continue to thrive by finding new avenues. Privacy debates will not be concluded. As a matter of fact, with the advent of artificial intelligence, ethical debates about how to regulate it will only be further ignited. Fraud, viewability and context will have to be addressed in DOOH, audio, CTV and gaming.

The risk may evolve, but the underlying truths will always be valid: Independent measurement is critical, industry-defined standards and framework are crucial, and education and literacy programs are necessary.

While it is right for the industry to focus on the risk-based approach and enable advertisers to choose the environments that are more or less suitable to their brand, we ought not to forget that contextual brand safety, defined by 4A's Brand Safety Floor, continues to exist.

The 11 categories of widely unacceptable content, including IP-infringing or terrorist content, must continue to be observed, avoided and acted on. The building blocks of brand safety—measure, benchmark, optimize, and monitor compliance—are fundamental because an ad that cannot be seen has no value. That is

GroupM's steadfast belief. Our high viewability standards — that 100% of pixels must be visible for at least one second, underpinning our quality-first approach — ensure our clients and partners understand that we will make advertising work better for them.

It's one of the reasons GroupM became a founding member of the Global Alliance for Responsible Media (GARM); to help ensure accountability within the industry. GARM, a recent industry alliance that identifies collaborative actions, processes and protocols for protecting consumers and brands, emphasizes the importance of the brand safety floor as a first line of defense. These brand safety basics will forever remain as we move to more evolved initiatives like suitability.

These fundamentals not only provide a foundation for brand safety, but also higher-quality impressions. Brands must not focus solely on protecting themselves; rather, they must seize this moment as an opportunity to form more valuable connections with people.

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GroupM is the world's leading media investment company responsible for more than $50B in annual media investment through agencies Mindshare, MediaCom, Wavemaker, Essence and m/SIX, as well as the outcomes-driven programmatic audience company, Xaxis. GroupM's portfolio includes Data & Technology, Investment and Services, all united in vision to shape the next era of media where advertising works better for people. By leveraging all the benefits of scale, the company innovates, differentiates and generates sustained value for our clients wherever they do business.

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