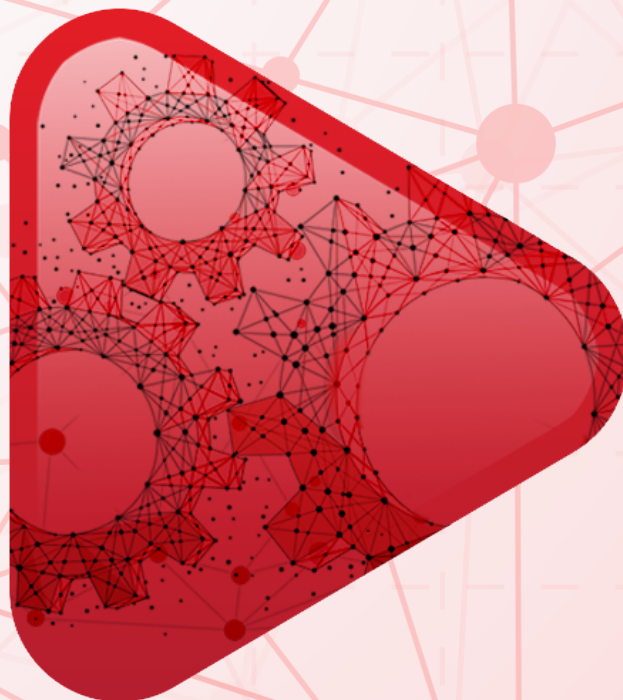




# Global Brand Suitability Survey 2019

The First Ever Global Survey of Brand Suitability Preferences



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**Methodology** - the survey polled 66 brand advertisers across the U.S. and EMEA regions. The Channel Factory Brand Suitability Survey screened participants based on their companies, job functions and seniority as well as their relevant knowledge and budget responsibilities. Insights in the report represent aggregated findings across the regions and also compare findings between the regions.



# Executive Summary

Brexit may put the UK in turmoil; the US presidential election is already a mud-slinging contest; movie stars and famous chefs are being outed in the #metoo movement; and, massive sports organizations are caught up in tense race relations conversations. All of these timely issues affect the way a brand thinks about their approach to advertising. It's not just about being "safe" from truly distasteful content. Brands must also think about what's suitable for their brand. While some brands choose to sit out, others, like Nike, make bold statements by choosing to join in. This research report reveals the topics that matter most to US and European brands across sectors.

Brand suitability, is the alignment of brands with content that makes sense for their image, customer base, local markets and business objectives, and it is imperative for brands to have a suitability strategy that works for the fast-paced digital environments. This is especially true considering recent research released by the Trustworthy Accountability Group in conjunction with the Brand Safety Institute which found that up to 93% of consumers will reduce their spending on brands appearing against unsuitable content.

Prompted by the gravity of these findings, Channel Factory decided to proactively undertake a survey of advertising executives across the U.S. and Europe in order to gauge sensitivity and tolerance around various brand suitability topics and in turn help brands better understand the challenges confronting brands in different markets and across different industries.



### The survey revealed that:

- ▶ Advertisers recognize the serious damage caused by brand unsuitable placements
- ▶ Brand suitability is deeply influenced by cultural and political realities at both the global and regional level
  - ▶ Today racism and sexism are particularly sensitive topics
  - ▶ Political sensitivities such as polarizing issues and fascism matter in different regions
- ▶ Brand suitability sensitivities vary greatly by sector
  - ▶ Retail, auto, financial services and other industries are not all equally affected by different content.
- ▶ Brand suitability sensitivities vary greatly by brand
  - ▶ A brand's own identity and approach to their audience also greatly factors into their approach to suitability.

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The results of this survey provide an in-depth view of the global variables of brand suitability and prove what a complex area this is, both geographically and from brand to brand.

*- Jules Kendrick, CEO, JICWEBS*

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# Channel Factory's Global Brand Suitability Survey

## Brand Suitability

The survey makes clear that effective brand media buying strategies must reflect brands' strategic commitment to adhere to values defined by them, their consumers, and the markets in which they operate.

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This survey shows the importance for companies of taking a nuanced approach to brand safety and suitability efforts that factors in both regional variation in sensitivities and other ad-related reputational risks such as malware and piracy. TAG's cross-industry programmes align closely with these findings, as we have built a global framework for local markets to address these issues.

*- Nick Stringer, VP, TAG*

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For several years now, advertiser targeting strategies have had to include robust plans for detecting and excluding universally agreed-upon offensive or illegal content, and publishers and platforms have had to become more sophisticated at keeping their houses in order.

These “brand safety” efforts are beginning to pay off, but a vast sea of online, often user-generated content remains which might not make sense for a brand to appear alongside because of its image, values, customer base, local markets and business objectives. This is where brand suitability comes in.

When ads appear against content they create an association, they imply an endorsement, and they monetize those responsible for its creation. And that speaks volumes about a brand.

Brand suitability rarely remains constant thanks to ever-shifting political, cultural and demographic trends. That’s especially important in today’s supercharged and often overheated geo-political environment, where sensitivities over issues such as race, gender and religion have led to deep divisions in both the U.S. and Europe.

One thing that does remain constant is the need for brand managers, media buyers, CMOs and advertising professionals to closely monitor those trends so they can stay on top of changing temperatures on a variety of issues. It’s important that brands and their partners adopt a flexible, culturally sensitive approach to brand suitability management.





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Brand safety and brand suitability continue to be high on the agenda for advertisers. As the UK industry owned auditor for brand safety, we welcome the insights provided by this survey. It will help shape the thinking behind best practice in the UK and beyond, whilst supporting advertisers in understanding how to align their brands with appropriate content.

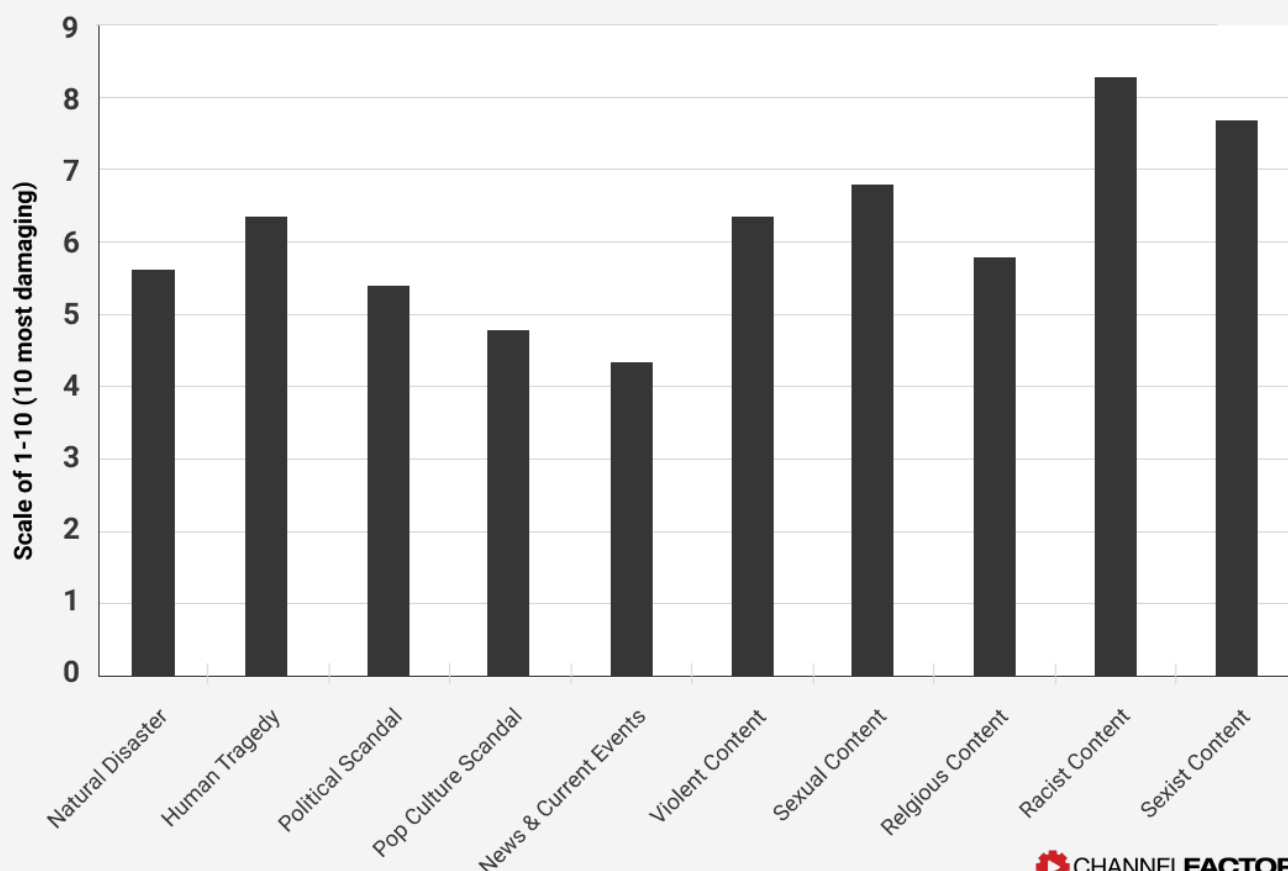
*- Andy Flint, Head of Business Development, ABC*

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# Brand Suitability Importance

The survey found that, across the board, respondents consider content relating to various suitability categories as posing a threat to their brand. On a scale of 1 to 10, with 10 being the most damaging, the survey found that on average brands find most suitability categories moderately to severely damaging.

## Damage Caused by Brand Unsuitable Placements







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The survey has raised an interesting position on brand suitability and buying truisms. For example, if you are buying against Comedy Central, you've written off the entire inventory of it if you're sensitive to x and y or you can carve out the type of inventory you are happy with. Sexually suggestive and mild profanity might not be dismissed. The simple fact is that brand suitability reflects the environment of the country where brands are buying media and they must be attuned to what is occurring and what will bristle people in that country.

*- MD EMEA, Channel Factory, Mattias Spetz*

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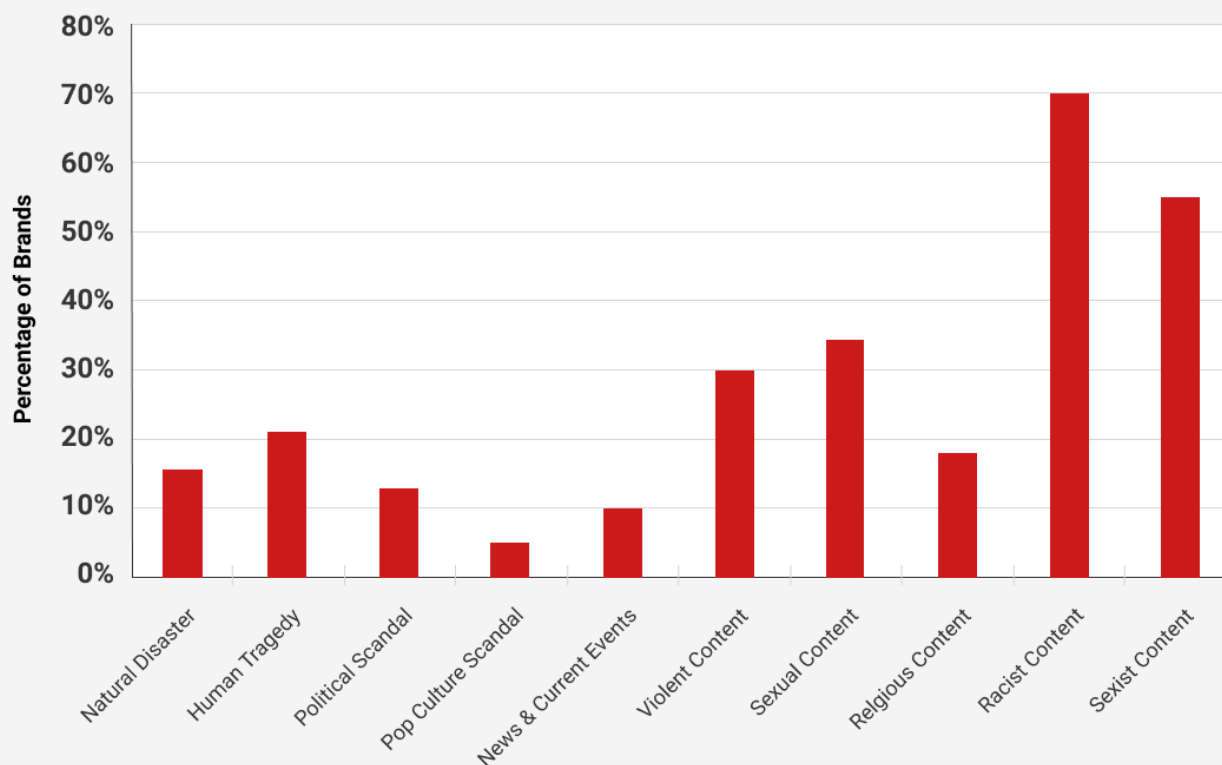
# Global & Regional Realities

The survey shows the deep sensitivity to hot-button political and cultural issues in brands' respective regions. Racism and sexism rank highest on the list of major global brand suitability concerns.

Scoring on a scale of 1 to 10, with 10 being the most damaging, the survey found that:

- ▶ 56% of respondents said sexist content would score a 9 or 10 on the scale
- ▶ 70% of respondents said racist content would score a 9 or 10.

## Riskiest Brand Suitability Categories



## Global & Regional Realities

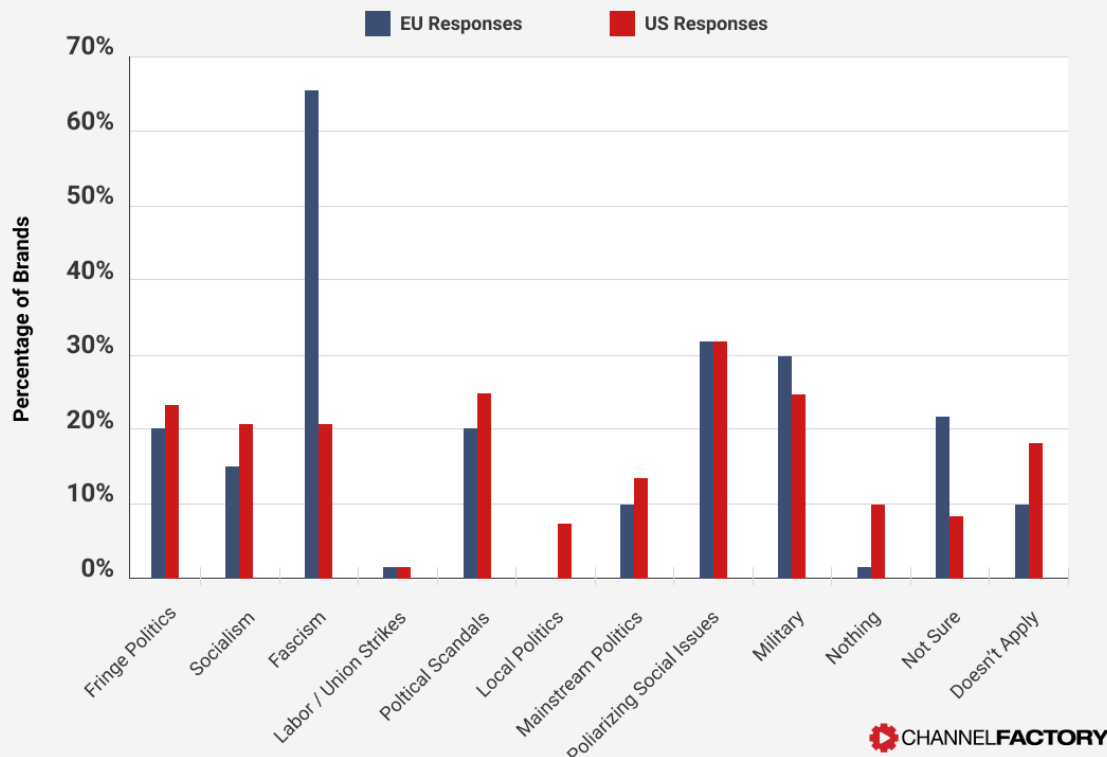
Those numbers were largely consistent between the U.S. and the EU. Respondents who deem racist and sexist content as the most damaging types are no doubt aware of how these two issues have stoked political and cultural divisions ahead of the upcoming U.S. presidential election. These issues are equally important for the EMEA region, with Brexit featuring heavily in content across Europe.

Where the two regions diverged was in political content. When asked which political content they don't want their brands to be associated with, here's how the regions differed:

- ▶ The greatest percentage of U.S. respondents, at 33%, said they don't want their brands associated with polarizing social issues. About 20% said they don't want their brands associated with fascist content.
- ▶ The greatest percentage of EU respondents, at 64%, said they don't want their brands associated with fascist content. About 32% said they don't want their brands associated with polarizing social issues.

The results demonstrate how sensitive the EU is to fascist content compared with the U.S., likely because of the EU's own history with fascism.

### Top 3 Most Damaging Political Content Categories





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This survey reinforces the results of TAG's recent consumer brand safety research showing that unsuitable placements can cause significant and measurable damage to a brand. It also shows the importance for companies of taking a nuanced approach to brand safety and suitability efforts that factors in both regional variation in sensitivities and other ad-related reputational risks such as malware and piracy. TAG's cross-industry programmes align closely with these findings, as we have built a global framework for local markets to address these issues.

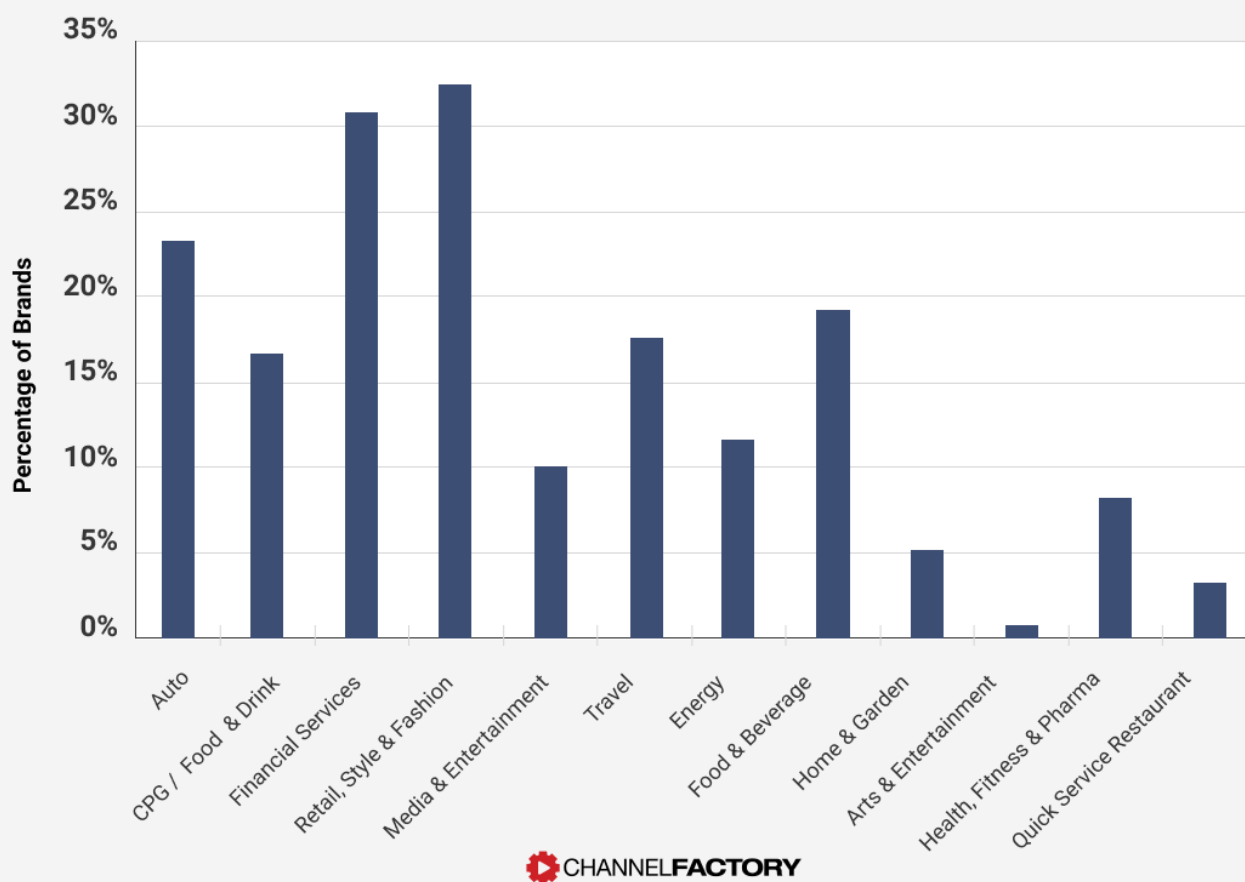
*- Nick Stringer, VP, TAG*

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# Sector Differences

The survey found that global advertisers in the following sectors are most sensitive to brand suitability issues: Retail, Style and Fashion; Financial Services; and Automotive. Not only are these typically the largest sectors by spend, but they also represent the sectors likely to be most affected by adverse consumer sentiment or intent that result from appearing against content which is negative for their sector, their brand and their region.

**Sectors Most Sensitive To Brand Suitability**

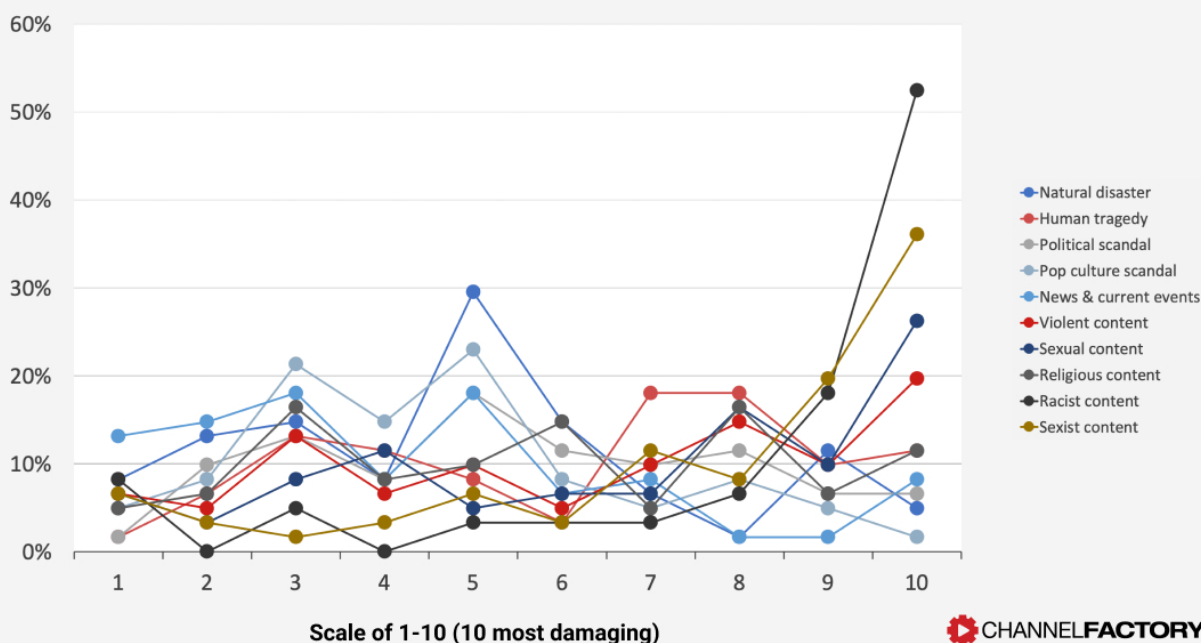


# Brand Differences

Despite broad consensus on the damage caused to brands by various categories of content, diversity of individual responses suggest brands have individual sensitivities and possibly varying definitions of suitability categories. The survey confirms:

1. That brands must consider their own suitability approaches in addition to global, regional, and sector-based factors.
2. Frank conversations are needed around definitions of suitability categories. Racism, for example, could implicate a range of content which brands may choose to include in their media plans, including investigative journalism, stand-up comedy, dramatized fiction, or biographical pieces. Brands must decide whether they wish to avoid anything with the whiff of controversy, even if that includes content with relevance, authenticity, and therefore audience reach and engagement.

## Individual Brand Variations

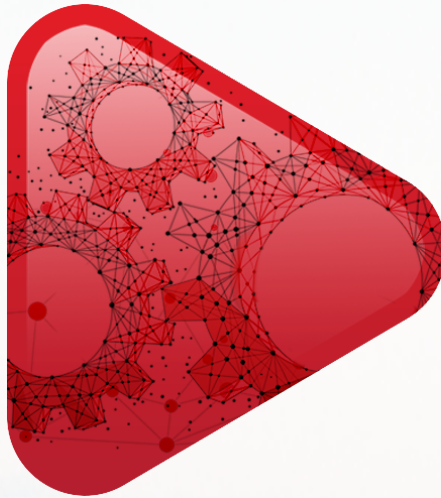




# What Does This Mean for Brands?

Brand suitability means different things to different brands. Individual brands must determine their own sliding scales, ranging from extreme to minimal caution on a variety of factors. There might be a general agreement about what's considered "unsafe" for a brand — e.g., content that is deemed racist or sexist — but brand suitability gauges the degree to which sensitivities differ from one brand to the next. So many different variables can affect whether something is suitable for a brand. Geography, language, the brand's persona and consumer-base, and what degree of sensitivity those factors warrant is reflected in their "brand suitability" approach.

Sensitivity is significant. Once a brand translates sensitivity to monolithic concepts such as violence, racism, sexism, politics, into practical media buying strategies, media buying becomes much more nuanced. Achieving brand suitability means making nuanced decisions about both individual content and the channels, networks or sites on which it is found and establishing ways to carve out advertising placements accordingly, especially on platforms like YouTube where channels might contain thousands of videos of which only a few fall outside of a brand's suitability framework.



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Brand safety and brand suitability are front and center as a priority for our clients to safeguard their brands' reputations. Brand safety is non-negotiable and brand suitability should be used to refine not override baseline control. This survey provides a view on how advertisers feel about the serious damage that can be caused by brand unsuitable placements and highlights the need for nuanced conversations.

*- Bethan Crockett, Brand Safety and Digital Risk Senior Director, GroupM*

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# What Can Brands Do?

A successful Brand Suitability Strategy should incorporate the following:

- ▶ **A Brand-Specific Strategy.** A brand-specific strategy should include serious conversations and strategizing to define brand suitability and capture it in detailed guidelines for their in-house, agency or partner teams to implement. While work intensive, this upfront framework covers millions of ad impressions that are either beneficial or damaging to the brand.
- ▶ **A Market-Specific Brand Suitability Strategy.** Fundamentally, brands need a robust and market-specific brand suitability strategy to stay agile enough to adapt to shifting cultural and political climates. The survey shows how prevalent brand sensitivities are. When sensitivities change, brands must be ready to adapt their ad strategies in a moment's notice. The people, places and things associated with sensitive suitability issues (e.g. racism) differ by market and change every 24 hours.
- ▶ **A Sector-Specific Brand Suitability Strategy:** Because different business sectors have different values and needs, any brand suitability strategy should include sector-specific elements. The survey's findings regarding sector sensitivities demonstrates how certain content themes might be especially problematic for a particular sector. For example, issues such as alcohol consumption and violence will have different consequences for automotive companies vs. energy drink or entertainment industry brands.
- ▶ **A Fine Tooth Comb vs. A Sledgehammer Approach:** While brands should not underestimate the importance of building and maintaining keyword exclusion lists, in order to navigate the nuance brands should approach the issue from both a negative as well as a positive angle. For the former, this means whittling away at what doesn't align with the brand using exclusion strategies to flag problematic content and subject it to either ad de-targeting or review and campaign re-integration. For the latter, this means actively curating content which does align with and amplify their brand. The better strategies lie in approaching long tail, independent, smaller creator-made content but this require more dedicated research and media planning.



# Conclusion

The Channel Factory Brand Suitability Survey provides brands with a wider view on the sensitivities surrounding the type of content deemed brand suitable, and confirms some clear takeaways for brands to consider going forward:

- ▶ Every brand has their own approach to suitability
- ▶ Different cultures and regions have different sensitivities
- ▶ Hot button issues change over time
- ▶ Brands need a comprehensive suitability approach to cover planning, real time management and measurement

Learn More  
About Brand Suitability [here](#)

