



mFilterIt
Adding Trust to Digital



INDIA BRAND SAFETY REPORT 2021

NOW AND FUTURE

Contents

FOREWORD.....	1
EXECUTIVE SUMMARY.....	1
DEMYSTIFYING BRAND SAFETY.....	2
BRAND SAFETY IN INDIA.....	6
Different Strokes of Brand Safety.....	6
Gradient of Maturity.....	6
Brand Safety Guidelines.....	7
Dealing with Brand Safety.....	9
Tools and Solutions.....	11
Emerging Trends.....	12
WAY FORWARD.....	21
Awareness & Education.....	21
Standardisation.....	21
Regionalisation.....	21
Best Practices.....	22
RESEARCHER'S NOTE.....	23
About Techarc.....	23
KEY CONTRIBUTORS.....	24
ACKNOWLEDGEMENTS.....	25

FOREWORD



Moneka Khurana
Country Head, MMA India

Brand Safety Issues are Not Going Away! On the contrary they are likely to increase with increased spends in digital environments.

With the increased complexity of protecting a brand's image and reputation from the rise in threats from fake news, inappropriate content, marketing tech, the digital supply chain, ad fraud and more, SAVE a marketer-led Future of Brand Safety Council led by MMA globally is working to provide guidance for brands in all marketing environments.

Seeking inspiration and learnings from the Save council MMA India has set up an India brand safety charter to ensure safety guards for brands and solve for the biggest marketing problems brands face in this era of dramatic changes in consumer behaviour, technology innovations and marketplace disruptions.

A rise in brand safety issues signals a potential nightmare for marketers. And if ignored, brands can face serious backlash to your reputation, your customer loyalty, your revenue, and eventually to your bottom line.

To facilitate a structure and help roll out brand safety guidelines & case studies as well as shape the future of media quality in digital advertising MMA India along with the advisory council enables thought leadership and guidance to marketers on assessing and deploying right brand safety safeguards. This report being one such initiative to help understand the key pillars of brand

safety clubbed with practitioner views on what it takes to build a robust brand safety blueprint in an environment where 64% of brand custodians are unsure about who owns the responsibility of keeping a brand safe and 42% of respondents feel that the ecosystem lacks awareness about the threats and challenges which may surface when the safety of a brand is compromised.

MMA India will continue to bring access to brand safety resources such as policies, processes, and templates to enable marketers.

Happy Reading! I am sure you will find the guide extremely useful and well timed whilst you undertake the 2022 planning process.

FOREWORD



Faisal Kawoosa

Chief Analyst, Founder Techarc

Brand Safety is at an inflection point as the world opens for transparency and trustworthiness in digital world. The ecosystem has already started debating about Internet 3.0 which will be fundamentally empowering the consumers of digital content, services, and products about what's happening with their presence, data and other digital footprints and how is the ecosystem leveraging that.

Brands, including their partners who are responsible for their digital presence, need to take a proactive stance and create a trustworthy and safe environment by ensuring they are not put on the wrong side and associate with something that harms their integrity.

With digital commerce becoming mainstream and D2C the preferred channel for several business categories, brands need to be certain about the message and mediums they are getting represented through along with the genuine impact that's getting created.

In this India's first Brand Safety Report, we present to you the understanding and perceptions of the industry about Brand Safety and how the custodians of some of the leading brands across all major industry verticals are implementing the best strategies and practices to protect their brands from the rising evils over digital landscape.

EXECUTIVE SUMMARY

- Brand safety is in a nascent stage in India. There is limited awareness with different gradients of maturity about the issue which is influenced by several factors.
- Very few brand custodians are taking brand safety seriously. The limited awareness isn't allowing them to see the short as well as long term impact of brand safety challenges.
- The present brand safety guidelines are not aligned with the changing business needs where digital takes the centre stage. Brands are required to revisit their guidelines and take a digital first approach.
- The onus of brand safety is ultimately with the brands. They may delegate specific tasks to their partners and agencies, but brands will have to proactively protect and enhance their identity and build reputation.
- The standard brand safety configurations available with the advertising platforms are not enough to achieve the desired goals and objectives. Brands must leverage specialised tools and solutions for brand safety for tangible outcomes.
- Brand infringement is increasingly becoming a gateway to brand safety issues. Brands cannot ignore brand infringement challenges which are posing serious threats around integrity and trustworthiness.
- There is a need to formalise a structured and purpose driven knowledge repository around brand safety in India.
- The localisation and regionalisation of brand safety is of paramount importance as that will give brands the confidence of immersing into the audiences at the last-mile level within a safe environment.
- Brand custodians must adopt the best practices to proactively embrace brand safety and strengthen the brand by getting rid of the harmful issues which can result in irreversible damages.

DEMYSTIFYING BRAND SAFETY

In today's programmatic landscape, online marketers face the challenge of maintaining brand safety. The COVID-19 pandemic has impacted brands in a big way, and the Advertising and Marketing industry is no exception. With the rapid growth in digitization, digital safety of brands has become a prime concern for brand custodians and publishers alike. It's imperative for the brand to adopt efficient techniques to place ads effectively and reduce inappropriate content on all platforms.

A rise in digital media spending accelerated by pandemic has further exacerbated and highlighted the issue of Brand Safety in the Digital Jungle of Advertising.

Brands and marketers are constantly looking at various formats and mediums to ensure the efficacy of their ads and also make sure that it reaches their target audience. With a plethora of communication formats at their disposal: Video ads, display ads, search along with varied mediums of reach: Google, social media, YouTube, the complex world of the digital ecosystem has been caught in cobweb of drastic repercussions.

A bank account opening ad is placed next to bank robbery news. 'Incredible India' ad campaign is placed next to news on oxygen shortage and death of hospital beds in India. Brand safety has off late become a major concern for the entire ecosystem. Fake news, political propaganda; ads placed next to terrorism related content, child pornography, such issues have made headlines in the digital

advertising industry. Ultimately, a brand becomes the victim in such instances because of unsafe advertising practices. Social media has added another layer of complexity by giving consumers a platform with a voice where the brands are dragged as a means to penalize them for unsafe advertising practices.

What is Brand Safety?

Brand Safety essentially entails that the real estate of the digital ad is in a safe environment: the content and context are in tandem, the brand values align with the messaging and intent, the colour and logos are well defined and that the surrounding environment is free from objectionable content.

A brand comes under scrutiny when the media placement is unintentionally served next to inappropriate content: fake news, terrorism, adult content and the likes. Such instances put the brand in a negative light which hurts their reputation, their goodwill and have a larger impact on their ROI in the longer run.

A brand's messaging has to be designed in a way which is free from wrong interpretations. In a land with diverse cultures and affinities, brands should take into account the various interpretations of the content being advertised. Many a times, well-known brands have become a subject of mockery because of their ad messaging. Racism, sexuality, gender biasness, political affiliations, violence and many more such instances have been

highlighted by consumers which put the brand on the pedestal of investigation.

Another way of ensuring brand safety is to address the medium through which the information is being disseminated. Social media platforms have always been caught in the whirlwind of controversial debate. One such platform was accused of supporting fake news in the digital ecosystem. In other instance, a well-known news website was called out for supporting terrorism and hate speech. It is imperative for brands to understand the channel through which they want to advertise.

In the growing age of privacy first policy, brands also need to ensure that the customer privacy is not compromised upon with respect to the channel deployed for ad dissemination. Brand safety is an interconnected web of many issues which puts a brand in a precarious position with its consumers.

Globally, GARM framework has established a suitability framework which categorizes advertisements in low to high-risk buckets. It has established a safety floor suitable for advertising by addressing 11 topics a brand should refrain from while advertising online:

1. Adult & Explicit Sexual Content
2. Arms & Ammunition
3. Crime & Harmful acts to individuals and society
4. Death & Injury
5. Online piracy
6. Hate speech & acts of aggression
7. Obscenity and Profanity

8. Illegal Drugs/Tobacco/e-cigarettes/Vaping/Alcohol

9. Spam or Harmful Content

10. Terrorism

11. Debated Sensitive Social Issues

High viewership across regional content with deep penetration of Internet in smaller cities has made brand safety a pertinent challenge. Advertisers and brands neglect accounting for regional languages while ensuring safe practices to advertise online therefore they fail to blacklist brand un-safe placements. Affiliates defraud the brand and advertisers by placing ads on inappropriate and high traffic low quality placements. Such placements lead to non-targeted audience thus resulting in negative publicity while getting low ROI on their campaign.

Today, brand safety is not limited to advertising in a brand safe environment but covers a broad range including ad *fraud*, malware, and brand infringement as well. All such forms of fraud are criminal driven who deploy sophisticated technologies to trick the digital supply chain and

pocket the ad revenue. It's a whole new nexus of marketing terrorism which comprises brand safety, consumer safety and cost a brand their reputation.

Publishers run marketing campaigns over incent platforms where the user downloads or uses the app for a certain incentive rather than an interest in the app. Fraudulent publishers mix the incent traffic within non-incent traffic and flag to the advertiser making fraud detection difficult. This impacts the campaign's performance with low quality leads and engagement. These criminals also simulate app installs KPIs while the actual user does not exist. Thus, brand visibility at a substandard affects the advertiser's brand image.

Fraudsters share premium account credentials online, at discounted prices leading to loss of account for customers and trust in brand gets diluted owing to lack of security measures adopted by the brand. This impacts a brand as they lose direct revenue caused by potential customers with unauthorized access. Credential sharing also exposes crucial personal information such as address, payment details and calling histories. Data leaks, service outage all hit the brand image negatively, thus compromising a brand's safety.

Spam e-mails misguide the consumers leading to other safety and infringement issues. Fraudsters copy a brand's mail creative template and send bulk spam messages. These mails contain malware and fake messages with tricks consumers into revealing their personal information and the malware also harms their devices. The malware steal information which results in financial loss for the consumers also damages the reputation of the brand.

SMS phishing, where criminals send fake messages on pretext of the brand and trick them into a trap hits the brand reputation. Such infringement issue is not only a matter of legal complication but also blemishes the brand image.

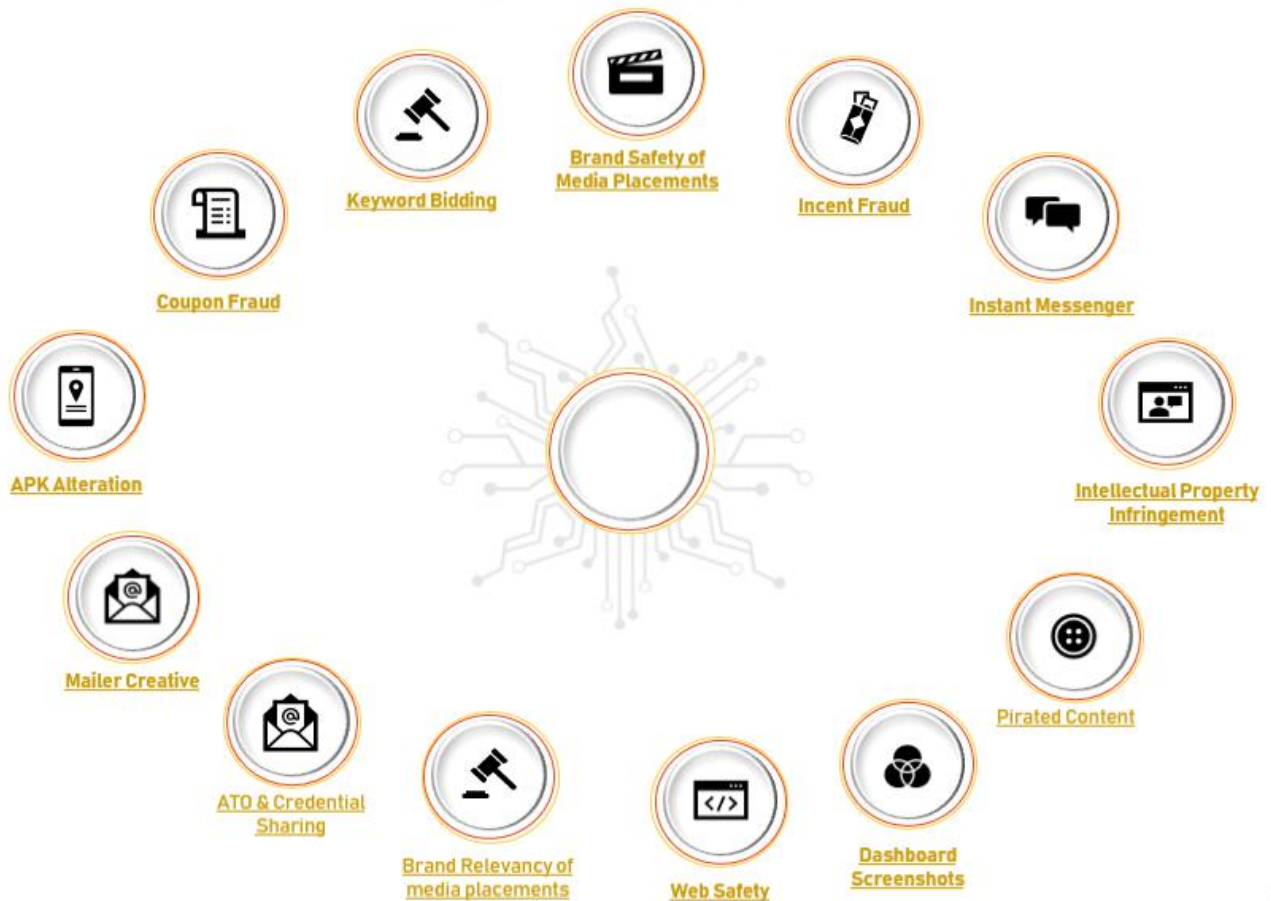
The digital ecosystem is marred with complex challenges of ad fraud and brand safety issues. The global digital advertising and marketing ecosystem is set to become a \$780 billion economy whereas the ad fraud economy will become the biggest market for organised crime worth \$50 billion.

Brand Safety is brand's responsibility. Brand safety is an age-old problem and with a rise in digital adoption, the concern is here to stay.

'The complex world of the digital ecosystem has been caught in cobweb of drastic repercussions.'

Brand Safety Issues

An Inter-connected web



BRAND SAFETY IN INDIA

Brand Safety is the newest focus area on the charter of brand custodians in India. Currently, the marketing chiefs are exploring what Brand Safety is and how it directly as well as indirectly impacts their brands.

There is not a standard single definition or view about Brand Safety across the marketers. Resultantly, there is 'noised' interpretation of Brand Safety among the brand champions.

Advertisers and the marketing ecosystem need to come together and collaborate to enhance the understanding, awareness, impact, measurement, best practices, and challenges in Brand Safety.

Different Strokes of Brand Safety

The extremely divergent understanding about Brand Safety among the ecosystem is resulting in very different views. Below are some of the interpretations of Brand Safety by marketing leaders across different brands.

- *Brand Safety in digital is something that the cybersecurity / IT team must be responsible for.*
- *Brand Safety is the responsibility of brand team, which is managed at a global level.*
- *Brand Safety is the task of digital marketing team who work with external partners to safeguard the image and reputation of a brand.*
- *Brand Safety is relevant to certain categories or sectors, especially the ones dealing with sensitive*

demographic groups like children and women.

- *Brand Safety is the prerogative of large-scale enterprises and does not concern small and mid-size businesses.*
- *Brand Safety only concerns digital first and digital only brands, who are fulfilling sales through online mode.*
- *Brand Safety is about ensuring protecting brand identity like logos, trademarks, brand colours, etc.*
- *Brand Safety is something that a B2C brand should be concerned about. B2B brands aren't impacted by any such issues.*
- *Brand Safety is being discussed as an emerging theme in the digital ecosystem. However, its yet to be ascertained how it is relevant to brands.*

This confusion about the definition and scope of Brand Safety in the digital ecosystem within organisations is resulting in gaps which are seeping into a brand's reputation.

Owing to this confusion, most of the organisations aren't clear what all does Brand Safety encompass. There is at many a times 'passing on the buck' approach which lands Brand Safety into a no man's land. On the contrary, it should be everyone's concern across the functions of digital, IT, corporate and marketing.

Gradient of Maturity

Scale of the organisation, depth of digital transformation, local control on marketing function is among few key reasons resulting in

different maturity level among organisations with regards to the understanding and awareness of Brand Safety.

The global organisations are relatively better aware about Brand Safety. However, most of them see it as a centralised function which is controlled globally as a charter of brand teams housed in the global headquarters.

With the digital only and digital first organisations, which are way ahead in the digital transformation journey, the understanding of Brand Safety especially in the digital landscape is far deeper and wider. However, in such organisations it is purely seen as a domain of digital marketing teams while the emerging challenges in Brand Safety require calibrated actions across functions, also involving cybersecurity and IT many times.

There are some global organisations where the regional marketing team is very cognizant of the significance of Brand Safety and its regional play. However, they do not have the charter to drive elements of brand reputation locally.

Organisations, either because of their digital transformation journey or their structure are at different levels of maturity in terms of handling Brand Safety. This is causing an imbalance in the understanding and approach of brands towards Brand Safety even being in the same industry, region, or level of digital transformation.

“Over the last couple of years, conversations around Brand safety have

become more nuanced. With the alarming increase in misinformation and fake news, marketers are junking the rudimentary Brand Safety guidelines of the last decade and moving to more robust Brand Suitability frameworks. As marketing evolves from interruption to engagement and advertising to content, marketers want their brands to meet consumers in positive environments and in a favourable state of mind.”

Aditi Anand, Head - Creative Strategy for Brand Coca-Cola (India & Southwest Asia)

Brand Safety Guidelines

The first actionable thing for any organisation in achieving Brand Safety is framing guidelines and then work on achieving the goals and

objectives laid down. Some of the key points covered in a brand safety guideline include: -

- What is the vision and strategic positioning of the brand?
- What are the regulatory requirements that need to be complied with?
- What areas and activities resonate with the brand?
- Which actions can never align with the brand?
- What are brand identities and their attributes?
- What should be the brand narrative, its language, its tonality, and usage of appropriate words?
- What should be the key contours of brand campaigns?
- Which persona, age group, gender and demographics should be representing a brand in its campaigns?
- How will the gender diversity be handled in advertisements?
- Are there any brand suitability aspects with regards to channels, content, timing, etc., of an advertisement?
- How will the brand be represented on UGC or user generated content?
- Who could represent a brand? How can humans and non-humans like animals be part of the brand identity?
- How does a brand posture in situations involving political, diplomatic, and other such sensitive postures?

"Brand-safety in India is talked a lot but when it comes to taking an action, it is more reactive than proactive. Many a times, a trigger comes when consumer discovers and flag the brand. I think the kind of rigor we apply at a planning stage about audiences, targeting, numbers, deliverables etc., if we give even 30% of that rigor to BS, brands will see a considerable improvement of their being shown at safe places. Most advertisers don't even look at the post-evals placement report."

*Chintan Soni
Vice President – Digital
Products
Madison India*

A critical evaluation of the brand guidelines across brands reveals some interesting facts, which exhibit how the ecosystem is at an early stage of the learning curve and a strong digital orientation is missing from the broader brand safety guidelines.



These guidelines have primarily been designed in the non-digital era and expanded into the digital ecosystem. Majority of these guidelines have either been formulated from corporate marketing objectives and / or regulatory requirements. Hence, they do not necessarily capture the essence of digital ecosystem and how brands can remain safe within it.

Dealing with Brand Safety

Owing to different levels of awareness and very generic brand safety guidelines, there isn't a standard approach adopted by brands in staying brand safe.

Brand custodians have different views about who should be accountable for brand safety which also affects the approach taken by them. Very few of them believe that the onus

is with the brands. Even within brands they are unsure who should be taking care of it.

"Data and identity protection have become essential than before as the scope for brand safety has widened in today's digital advertising space. While digital media provides substantial opportunities for brand visibility, it also poses challenges in terms of brand safety, negative publicity in potentially unsafe environments that harm the brand's reputation and credibility. Brand safety is a major concern, while advertising on online platforms that display contextual ads, therefore there is a need to have appropriate guardrails in place. There are primarily two ways a brand

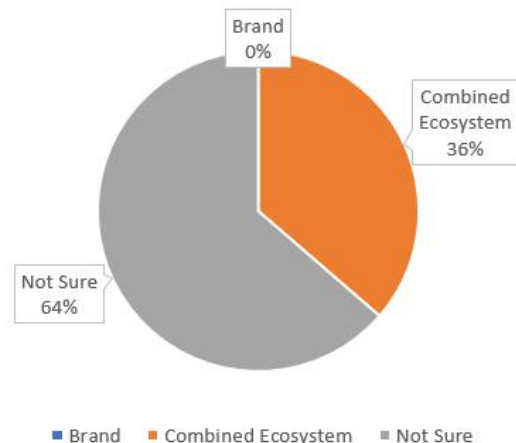
identity can be compromised. First, when the ad appears along with unethical, fake, or abusive content and the second biggest challenge is when it appears with content that contradicts the brand's core philosophy and values. Such advertisements may lead to serious brand compliance issues.

At MediaTek, we have realized that we need to counter these challenges with the help of the right tools and technology. Today leading publishers globally have analytics tools that allow you to specify websites and platforms where you don't want your ad to be placed. You can report the pages or specific content later whenever you

encounter inappropriate placement of your ads. We have equipped our marketing/advertising team with these tools to help them keep track of the advertisements and perform timely filtering as and when new cases emerge. It's time we grow more serious about the challenges ahead and adopt proactive policies and practices to avert the complications associated with brand safety."

Anuj Sidharth, Deputy Director
Marketing MediaTek India

Brand Safety is the responsibility of?



Some brands are of the opinion that their partner agencies who are responsible for the overall digital positioning and manage the digital strategy for them, need to investigate brand safety as well. However, all the agencies, especially smaller ones, may not be very proactive about achieving brand safety for their clients. This is because there are increasing performance pressures on agencies to achieve the predefined quantifiable KPIs, where looking into qualitative aspects which are highlighted through brand safety take a backstage.

Tools and Solutions

Very few brands are using specialised tools and solutions for brand safety. The common belief is that the basic filtering allowed at the advertising platform level is sufficient to define and create a brand safe environment.

Advertisers primarily feel that keyword filtering and target defining of campaigns makes their campaigns safe, hence, they don't result in any kind of safety challenge for the brands. However even filtered campaigns do not ensure the correct contextuality of campaigns. This means the campaigns may appear on the channels which are highly relevant for the brand and go directly with its image and positioning. But the campaigns

may still not be running in the relevant context resulting in a brand safety issue.

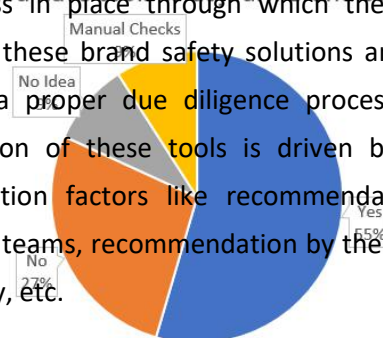
"We should actively use the specific negative keywords list, placement exclusion list and also look for publishers who deploy ad safety tools"

Amlan Pati, Digital & E-Com Marketing Head Cavinkare

Other than the platform level solutions, some of the brand specific solutions used by the advertisers include IAS, MOAT, mFilterIt and Double Verify.

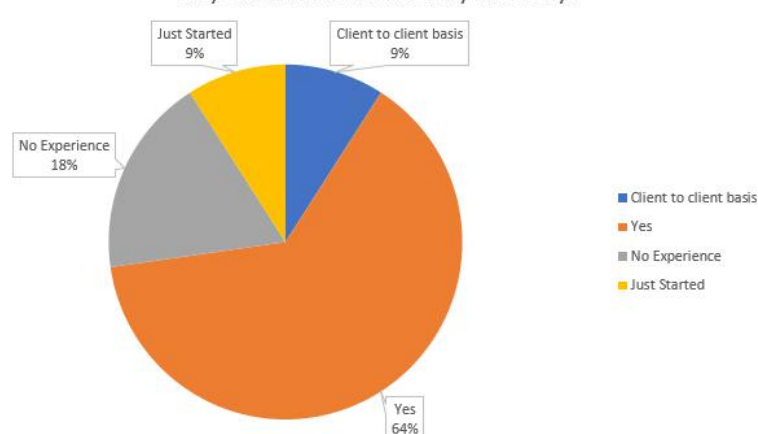
Presently, brands do not have a very robust process in place through which they could select these brand safety solutions and tools after a proper due diligence process. The selection of these tools is driven by other evaluation factors like recommendation by global teams, recommendation by the partner agency, etc.

Do you have tools to adjourn Brand Safety?



Checks

Do you check for Brand Safety Internally?



“Brand safety, ad verification and viewability (BAV) is extremely critical part of media investment strategy and if done right fuels democracy and open internet. We stack rank it with Ad verification at base which allows verified human traffic, followed by brand safe environment where the ad is viewable to the user. We have built in BAV guidelines and risk assessment frameworks for our brands to safely navigate the dynamic digital world across devices, content, and environments. Brand safety, ad verification and viewability (BAV) is an extremely critical part of media investment strategy and if done right fuels democracy and open internet. We stack rank it with Ad verification at base which allows verified human traffic, followed by brand safe environment where the ad is viewable to the user”

Karthik Shankar, Head of Trading, GroupM

Emerging Trends

Though the awareness is very limited and fragmented around brand safety, many progressive brand custodians believe that the

present approach with regards to handling of brand safety needs to change.

This is because of the following primary reasons: -

- a) The brand custodians understand that digital engagement is not transactional

or discreet in nature. If the engagements are executed in a brand safe environment the brands can create a trustworthy relationship with the audiences, in which reputation and image plays a critical role, the brands will have perpetual relationship with the audiences. This will result in the creation of communities who will fetch manifolds of lifetime value (LTV) for the brand.

- b) Globally as well as in India, the growth of digital subscribers is happening at a declining rate. As per industry estimates, against 100-120 million smartphone users getting added every year in 2014-15, today India is adding a little over 40 million smartphone users annually. This means that the brands will have to nurture the existing user base carefully so that it doesn't become difficult to find new audiences.
- c) The third and a very important reason, which also got an impetus after covid-19 surfaced, is the changing role of digital as a medium. Brands have understood that the digital is not just an alternate channel but a strategic medium which will drive the businesses of future. Digital is no longer just a medium of outreach and communications. It is a medium of commerce and perpetual engagement with communities.

"Brand safety has become an increasingly

important point of concern in a day and age where brands are focused on using every opportunity to interact with their consumers - often in various moments, in different languages and in ways that connects with the consumer best- at this juncture, it becomes increasingly important to keep brand reputation as a centre focus as we expand our communication touch points and interact more with our consumers".

Nandhitha Hariharan, Brand Safety Tools, Loreal

As digital becomes pervasive and every kind of sector explores digital there are new brand safety issues that the brands are facing with. The key emerging trends with regards to brand safety include: -

- The most important brand safety challenge is getting the contextuality right for any campaign to run. It is no longer just the channel or medium to be identified. But the channel must be

contextual at that moment of time when the ad appears on it. This challenge is very relevant in case of mediums like news channels. Though news channels would have the right audience, and position very well with the advertising brand, however, the context of the news which appears on it along with the ad of a brand being displayed becomes extremely important for any advertiser in defining the suitability. The advertiser could not only get the negative RoAS but also get associated with something which would not be resonating with the brand identity. For example, a brand may never want to be seen with content related to violence and terrorism, but on the news portals, its ads could appear just next to such content creating a mismatch.

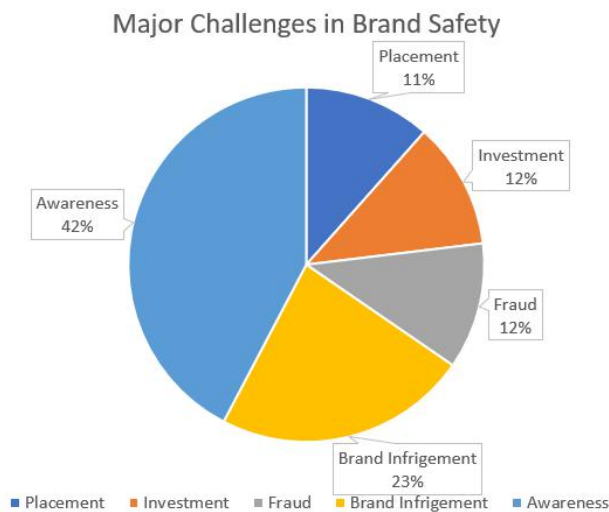
- The user generated content or UGC is considered to be one of the high intents of engagement content. This is because such content is spontaneous and reflects the immediate environment of the target audiences. Further, this could also be in regional languages driving high engagement. Since, the content is not curated by some professional content agency, there is a very high risk of inappropriateness of the content in terms of storyline, visuals and pictures being used, language being spoken, and other associated nuances. This is posing a great challenge for advertisers especially on platforms like YouTube where billions of minutes of

user generated content is created every year.

- The need for going regional is one of the key agenda points for advertisers. With the help of non-textual formats like pictures, animations and videos, advertisers feel they can best engage with people of different regions and increase the brand equity by localising it. This is extremely important in a country like India, which is the land of multiple cultures, languages, and regions. The brands need to ensure safety even in such scenarios where the very relevant regional mediums need to comply with their guidelines and other requirements. Most of the present solutions available do not consider regional nuances of content and result in inadequate protection of brands.
- In areas like edutech and gaming, where the primary consumer of such content and services would not even have attained the age of legal contracting needs to be extremely protected from the inappropriateness. Also, the issue becomes complex, because the device through which children might be getting using such services could be recognised as that of adults, their parents. So, the entire targeting of advertisements, etc., would be based on an adult's preferences and personalisation, but the actual consumer of the ad might be a minor.
- The rising case of brand infringement has become another emerging challenge posing serious threat to the

brands. The legitimate identities of the brands are exploited and misused for ulterior motives resulting in reputation issues for the brands as well as creating serious trust issues.

Brand Infringement – The gateway to Brand Safety threats



“As digital content consumption continues to see rapid growth, brands see significant opportunities for contextual targeting and placement with the relevant consumer set. However, it is extremely critical for brands to minimize the risk to brand reputation due

to placements on unsafe or inappropriate content.

Brand safety hence becomes a critical aspect for advertisers and is necessary to drive the right balance between risk and opportunity.”

*Shivam Ranjan Marketing
Head, Motorola India*

Brand Infringement is seen as one of the serious issues that the digital ecosystem is grappling with. Post, emergence of covid-19, brands across B2B and B2C have seen steep rise in brand infringement cases which not only is a business risk but is also now becoming a pain point for the brand custodians. Some of the major brand infringement issues being faced over digital mediums are: -

- Parallel and mirror websites are being created by fraudsters where they *typosquat* genuine URL by creating a very similar web address confusing audience. This is posing a serious financial as well as security threat to brands in ecommerce where scammers manage to get some traffic on these bogus portals to transact resulting in a financial fraud. While some of the users do realise that they have been cheated,

many end up blaming the brand as they feel they have transacted with the brand genuinely. This creates a serious integrity and trust issue, which may also lead to losing a potential new customer for lifetime. In the Indian context this is extremely important as ecommerce players look for new users every year to do transactions and start buying online, especially among the socio-economic profiles where the understanding of digital platforms could be low.

- ATO or account takeover fraud is another offspring of the brand infringement. The scammers get full control of the accounts of genuine users of an ecommerce service which they then use for various frauds including causing a financial harm by reaching out as a genuine brand representative or simply siphoning the points and other loyalty currencies that may be there in the account. This is increasingly happening in case of gaming where fraudsters takeover accounts and consume virtual currencies like diamonds, etc., of gamers. ATO can become a serious challenge going forward in the areas of cryptocurrencies, where a fraudster can siphon off the financial gains that investors get in a very short span of time.
- Even B2B brands do not get spared. A lot of fake websites, call centre numbers and other similar mediums are being continuously created by scammers in the name of very reputed brands for business associations and partnerships.

Every day, lakhs of ordinary people get potential employment emails and SMSs linked to a WhatsApp number for various kinds of frauds. Typically, users are asked for small token amount in the name of processing fee, application fee, etc. This is again done by infringing any identity of a brand.

All such brand infringement issues are resulting in irreversible brand safety situations by bringing disrepute to the brands for none of their fault.

"With digital medium taking a lion's share of the brand and corporate messaging, the issue of brand safety has come to the fore. On the advertising side, we've faced issues such as untrue/biased review promotions, infringement of copyright by competitors on Google ads, creation of landing pages seeming like our brand language, and so on. But the brand custodian's purview doesn't end there. There are also issues of

unassociated individuals claiming to work at the company or ex-employees still being associated with the company on LinkedIn, that need to be kept in check. Interestingly, platforms like Google, LinkedIn, ZoomInfo, and Demandbase are making significant strides on their part to keep information on the internet as true as possible. And while there are no automated ways of keeping this in check, yet the onus is on brand custodians to check for such anomalies and create a platform for teams beyond marketing to report such infringements, when spotted."

Vartika Verma, Global Vice President of Marketing, yellow.ai

"Digital media is evolving ahead of legislation, resulting in a proliferation of less than credible sources of authority and echo chambers on social media in India. Advertisers, therefore, can find their messages inadvertently appearing on platforms and sites and can be mistakenly seen as endorsing misinformation or be a part of a less than safe consumer environment. This is a wakeup call for all advertisers who want to leverage the long reach of technology, but also need to protect the integrity of their brand and business, and media safety is now a huge topic of discussion in back rooms with agency partners. HMD Global invests its marketing dollars in

responsible media only, and it actively withdraws from adversarial narratives or channels that promote these narratives. It has signed up to the Conscious Advertising Network, and working with media partner GroupM, responsible media investment is prioritised."

Ruchira Jaitly -
Head of Marketing - HMD
India

"Being custodians to an education brand, brand safety has been an area of focus. We seek control & confidence over the digital space, as the dated and simple brand safety tactics need serious augmentation. While we are witnessing a monumental rise in digital content consumption, some of

the common reputation issues like copyright infringement, unmoderated user-generated content, etc. have been making the operations more difficult. Therefore, it is critical to closely monitor the curated content that is appropriate in nature and reaches the correct set of audiences.

A better understanding of the TG and effective meta keywords/tagging also helps in placing the ads correctly and avoid bot traffic/unsolicited reach.

At upGrad, we prefer working directly with publishers to counter content spillage. We have

been using trusted third-party tools for ensuring content verification that helps us in maintaining a collaborative effort between regulators, industry trade bodies, brands, and digital platforms. Additionally, as we initiate a brand or performance marketing campaign, we make sure to enter a legal binding with the respective partners to outline the network/platforms on which our ad or content will be placed and shall be visible for a specific duration, and strong recourse in case of a breach. Ultimately, it's the onus of the brands and their marketing folks to ensure adherence to brand safety, as any deviation will harm the reputation of

the brand more than any other party's involvement in the breach."

Mayank Kumar,
Co-Founder & MD, upGrad

"Consumers, the world over, are seeking greater transparency and authenticity from their brands. This includes faster responsiveness to any objectionable issues - especially if it's online. Most managers do not even know where their brand is appearing online - partly because of the long tail in programmatic buys and partly because bad-faith actors are surreptitiously using the brand assets without the company knowing it. In this environment, creating adequate processes and visibility that promotes Brand

Safety is business critical."

Shubhajit Sen

A PrioriConsultants

"As a responsible corporate entity, every brand operates with an agenda of maintaining the highest standards of brand reputation protection practices. In today's highly dynamic environment, no brand wants its reputation to be associated with maligned messaging or a digital campaign performance be misled by malicious bots.

Hence, it becomes imperative to ensure a well thought-through strategy for brand safety. This helps build trust between companies and their customers. With brands adopting digital-first approach across streams, it has become pivotal to

evaluate every move and craft a brand safety playbook to preserve the equity and derive maximum ROI for the investments."

JaganathanChelliah

*Senior Director – Marketing
India & MEA, Western Digital*

WAY FORWARD

The industry needs to come together and collaborate in creating a brand safe environment under which brands from across the sectors could flourish and thrive adding to their brand equity.

Brand safety in India has started as a conversation and there is some action on the ground also happening. However, this needs to be done in a calibrated and participative manner where there could be coordination and information & knowledge sharing among the ecosystem partners.

Awareness & Education

The level and maturity of information and knowledge about brand safety is by and large limited within the ecosystem. When a CMO does not see brand safety as an issue, it's an issue! There is a need to create a persistent and formal knowledge repository which then needs to be spread across the ecosystem to drive meaningful thought leadership within the relevant and key members of the ecosystem. There is also a need of having inter-disciplinary information and idea exchange between digital, IT, cybersecurity, marketing, business, communications, policy and regulatory teams of organisations to look at brand safety from a strategic initiative than a functional issue.

Standardisation

Currently, brand safety is a chaotic space. The definition, impact and the measures that can

be taken to safeguard a brand are largely influenced by the individual knowledge and exposure of the key decision makers in the process of an organisation.

The industry needs to put together efforts in creating and defining standardised approach towards brand safety. It should include the broader perspectives that includes ad fraud, brand infringement, and other adjacencies that have a direct bearing on the brand safety.

The brands also need to create digital first or digitally driven guidelines for brand safety as they intensify their digital transformation initiatives.

Regionalisation

Localisation and regionalisation of brand safety is extremely critical. Brands want to reach through digital mediums to the last mile audiences and for that they are going regional in their content, messaging as well as the mediums through which they could have a very high engagement. While looking for such relevant platforms, it is extremely critical that there are systems in place which can sense and understand these regional nuances so that in the positive stride of immersing with the audiences, the brands do not land up unaware in positions that associate them with highly inappropriate content and mediums ending up their story before it begins.

Best Practices

For brand custodians, it's important to follow a set of best practices adopted by trend setters in the industry who are reaping its benefits by not only keeping their brands proactively safe but also adding to their integrity and equity. Basis the recommendations of over 20 brand custodians interacted representing B2B and B2C brands, large and small brands, global and local brands, coming from different industries and sectors, enumerated below are the best practices that should be followed by the brands along with their partners to achieve brand safety.

- Never ignore brand safety and assume that there is no threat or harm to your brand. It has been found that 9 out of 10 CMOs get astonished after getting a brand safety audit done through external partners.
- Creating rule books and guidelines alone will not help achieve the goal. There must be a continuous monitoring of the goals and objectives outlined in such guiding documents.
- Brand safety issue is not an indicator of poor performance that the brand custodians should feel shy of talking about. Rather, they should proactively check for any brand safety issue and make the brand stronger in the digital landscape.
- It is a myth that brand safety is relevant in some cases only, especially for B2C brands. Brand safety issues are equally harmful to B2B brands as

well. B2B brands must also be cognizant of brand safety issues.

- Brand safety must not be seen in isolation. Ad fraud, brand infringement and other adjacencies must be interwoven with brand safety challenges for better control and monitoring of the brand.
- The advertising platform provided rudimentary solutions for brand safety do not suffice as they take care of basic brand safety issues. With the space becoming complex, brands must explore specialised brand safety solutions and tools which deliver superior results.
- Only selection of the right mediums or channels can never ensure brand safety. The channel contextuality and relevancy has to be dynamically defined by analysing the content environment within which the brand gets placed.
- Brand safety is a continuous process and cannot be achieved at a single given point. Brands must perpetually and continuously achieve safety throughout the lifetime.

RESEARCHER'S NOTE

This study was carried basis primary interactions with over 20 brand custodians across the key industry verticals representing over 90% of the advertising spends in India.

The virtual interactions were conducted through video calls (owing to the covid appropriate behaviour) steered using a discussion guide. The key points where inputs were sought included: -

- The present state of brand safety in India.
- Awareness and understanding of brand safety.
- Treatment given to brand safety challenges.
- Brand safety guidelines and its salient features.
- Efficacy of the present solutions and tools used.
- Best practices to implement.

The objective of this report was to explore the present state of brand safety in India and contribute as a formalised and organised knowledge repository about the topic.

The conversations were recorded and then content analysed to summarise the findings in the form of this report. While over 60% of the respondents represented their organisations, the remaining brand custodians shared their own experiences and learnings which may or may not be the official positioning of the brand.

The research has been executed conforming to the guidelines prescribed by ESOMAR. The

verbatim quotes and explicit references have only been made after written permissions and approvals from the respondents who participated in this study.

About Techarc

Techarc – Technology Analytics, Research & Consulting is a new age technology market research firm offering insights and information services to decision makers offering them a neutral and unbiased perspective about the market, product, or service.

The focus areas of Techarc include Consumer Tech, Deep Tech, Digi Tech, Edu Tech, Auto Tech and Assistive Tech. Techarc offers subscription-based services as well as executes ad-hoc research projects in these domains. Leveraging some of the advanced technologies (Restech), Techarc research presents a holistic view of the market, product, or service in the fastest possible time with neutral perspectives about the business problems and challenges to support forming growth strategies for businesses.

It offers its services to large Tier 1 enterprises, SMEs, start-ups as well as leading advocacy / trade bodies.

Techarc is an institutional member of ESOMAR and MMA. It is the only technology market research group in India with ESOMAR membership.

KEY CONTRIBUTORS

Brand Safety Council:

facebook group *m*

MADISON



MMA Member:

L'ORÉAL

Industry:

airtel



upGrad



ACKNOWLEDGEMENTS



- ❖ Amit Relan
Director/Co-Founder, mFilterIt
- ❖ Dhiraj Gupta
CTO/Co-Founder, mFilterIt
- ❖ Sulagna Chakravarty Kapoor
Head of Marketing, mFilterIt
- ❖ Varun Grover
Product Head, Brand Safety & Infringement



- ❖ Faisal Kawoosa
Chief Analyst, Founder, Techarc
- ❖ Saloni Jain
Lead Analyst, Digi Tech, Techarc



- ❖ Moneka Khurana
Country Head, MMA India
- ❖ Lloyd Pereira
Director - Strategic Alliances & Programming, MMA India
- ❖ Sarayu Mannadiar
Executive – Marketing & Ops, MMA India

ABOUT MMA

Comprised of over 800-member companies globally and 15 regional offices, the MMA is the only marketing trade association that brings together the full ecosystem of marketers, tech providers and sellers working collaboratively to architect the future of marketing, while relentlessly delivering growth today. Led by CMOs, the MMA helps marketers lead the imperative for marketing change – in ways that enable future breakthroughs while optimising current activities. The MMA is committed to science and questioning and believes that creating marketing impact is steeped in constructively challenging the status quo, encouraging business leaders to aggressively adopt proven, peer-driven and scientific best practices, without compromise. The MMA invests millions of dollars in rigorous research to enable marketers with unassailable truth and actionable tools. By enlightening, empowering, and enabling marketers, the MMA shapes the future of modern marketing propelling business growth. Anchoring the MMA's mission are four core pillars; to cultivate inspiration by driving innovation for the Chief Marketing Officer; to build marketing capabilities for marketing organizations through fostering know-how and confidence; to champion the effectiveness and impact through research providing tangible ROI measurement; and advocacy. Members include:



The MMA's global headquarters are in New York with regional operations in Asia Pacific (APAC), Europe/Middle East/Africa (EMEA) and Latin America (LATAM).

For more information see www.mmaglobal.com

MMA LOCAL COUNCIL LEADERSHIP

Chair



AMIT JAIN

MMA India Board Chair; Managing Director

L'Oréal India

L'ORÉAL
INDIA

Co-Chair



PRASANTH KUMAR

MMA India Co-Chair; Chief Executive Officer, South Asia GroupM

groupm

Chair Emeritus



PRIYA NAIR

MMA India Chair Emeritus; Executive Director, Beauty & Personal Care Hindustan Unilever Limited

U
Hindustan Unilever Limited

MMA ADVISORY BOARD



MANISH AGGARWAL

MMA India Board Member; Head, Growth & Monetization Sony Pictures Networks India Pvt. Ltd



SUKHLEEN ANEJA

MMA India Board Member; CMO & Marketing Director, RB Hygiene Home, South Asia Reckitt Benckiser Group plc



SANDEEP BHUSHAN

MMA India Board Member; Director & Head of Global Marketing Solutions India Facebook



SAPNA CHADHA

MMA India Board Member; Senior Country Marketing Director Google India and South East Asia



ROHIT DADWAL

MMA India Board Member; Managing Director, APAC MMA APAC



ROSHNI DAS

MMA India Board Member; Director, Marketing Intel India



DOLLY JHA

MMA India Board Member; Country Head - Nielsen Media , South Asia Nielsen India Pvt Ltd



AJAY KAKAR

MMA India Board Member; Chief Marketing Officer Aditya Birla Capital Limited



MONEKA KHURANA

MMA India Board Member; Country Head - India MMA India

MMA ADVISORY BOARD



VIPUL MATHUR

MMA India Board Member; Global
Brand Leader
Hindustan Unilever Limited



SANKALP MEHROTRA

MMA India Board Member; Senior
Director of Monetization
Flipkart Ads



AVINASH PANDEY

MMA India Board Member; CEO, ANN
ABP Network Pvt. Ltd.



RAJESH RAMAKRISHNAN

MMA India Board Member; Managing
Director
Perfetti Van Melle India



PREETI REDDY

MMA India Board Member;
Chairwoman - Insights Division,
South Asia
Kantar



ARVIND R P

MMA India Board Member; Director
of Marketing and Communications
McDonald's India



RAVI SANTHANAM

MMA India Board Member; Chief
Marketing Officer
HDFC Bank



SIDHARTH SHAKDHER

MMA India Board Member; CMO &
Growth Head
Disney + Hotstar



ANUSHA SHETTY

MMA India Board Member;
Chairperson & Group CEO - Grey &
Autumn Grey
Grey Group

MMA AMMP COMMUNITY

The MMA AMMP Community is a credible industry resource centre for everything one needs to know on modern marketing. The circumstances of 2020 accelerated digital innovation and adoption by several years hence for MMA it becomes the best time to showcase growth frameworks and opportunities in the space of modern marketing. In 2021, MMA brought together a high-powered ecosystem to 'Accelerate Modern Marketing Practices' (AMMP).

The MMA AMMP Community is a specialized taskforce with elite leaders across the below six core councils:

- E-Commerce Council
- MarTech Council
- Voice & Audio Council
- Brand Safety Council
- Creative Council
- Media Effectiveness Council

The key objective of the taskforce is to enable resources, tools, evangelism, and education to accelerate modern marketing practices in the ecosystem.

Below is an overview of our taskforces that enable AMMP:

E-commerce Council

The E-commerce council seeks to build an overall understanding of the ecosystem and address cluster-specific issues, build capability in the Omni Channel Marketing and streamline the ecosystem through building a common vocabulary and enable industry standards.



MarTech Council

The objective is to enable pioneering marketers to understand the dynamically evolving nature of modern marketing. The Council seeks to add value to marketers by helping them to assess & adopt the right MarTech stack, enabling business transformation and optimizing marketing KPIs.



Voice & Audio Council

A huge untapped opportunity to connect with new target audiences that may not have been possible before due to barriers created by education, exposure, language, and connectivity. The Voice & Audio council seeks to create leadership & evangelism for marketers to better understand the dynamically evolving nature of voice marketing and enable guidelines, use cases, expertise to exploit the platform.



Brand Safety Council

Taking a cue from our global think tank, SAVE which is a marketer-led Future of Brand Safety Council created to ensure safeguards for brands in all marketing environments. The Council will develop processes, programs, benchmarks, and measures to protect your brand's reputation and marketing investment. With a strong local council, we are excited to extend our global learnings in India as well as pave a robust foundation going forward.

We as a Committee work extensively on enabling best practices, standards and guidelines for brand marketing and performance marketing by driving compliance at various levels in the ecosystem amongst stakeholders to deter ad fraud. The aim is to provide guidance and learnings to brands and performance marketers.



Western Digital.

Creative Council

The Creative council works extensively in building guidelines and best practices for effective short-format advertising content.



Media Effectiveness

The Creative council works extensively in building guidelines and best practices for effective short-format advertising content. The council seeks to enable POV on cross-media reach and mobile effectiveness versus other media & assess the impact of new media on business outcomes



DISCLAIMER

The information contained in the INDIA BRAND SAFETY REPORT 2021 provides the readers a comprehensive overview of brand safety standards in India and how brand safety plays an important role in the digital marketing and advertising ecosystem. The information contained herein is purely for reference purposes only and we assert that no business or investment decisions be made solely based on the information presented in the Report. If any such decisions are made based on the contents of the Report, the same shall be entirely at the cost and consequences of the decision maker alone. The information provided herein is on "as is" basis for which prior express consents have been obtained. While reasonable endeavours have been made to present accurate data in the Report, no representation or warranty, express or implied, is made or claimed as to its accuracy, completeness, correctness or merchantability and fitness for a particular purpose. Accordingly, MMA India, mFilterIt and techarc, including its directors, subsidiaries, associates, and employees shall not be in any way responsible for any loss or damage that may be caused to any person from any error in the information, views and opinions expressed in the Report. The logos, trademarks, and any other marks used in the Report belong to their respective owners and have been reproduced in this Report with their prior permission. The contents of this Report are confidential in nature and without prejudice. No part of the Report may be divulged to any third party, reproduced, or transmitted in any form or by any means, electronic, photocopying, mechanical, recording or otherwise without our prior express written consent. Appropriate express written consent be sought from various publishers/individuals who have been quoted in the Report prior to borrowing/using/quoting their content. The views expressed in the Report are based on the information available to us as of the date of the Report and are subject to change from time to time without notice. We do not accept the responsibility to update this Report, nor do we accept any liability arising from the use of this Report in any manner whatsoever.