tag

BRAND
SAFETY

KEYWORD
EXCLUSION
LIST

Best Practices

Version 1

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ABOUT TAG'S BRAND SAFETY CERTIFICATION

The mission of the TAG Brand Safety Certification is to significantly reduce the risk of the misplacement of advertising on digital media properties of all types, thereby upholding Brand Safety and protecting the integrity of digital advertising. TAG's Brand Safety Certified Program promotes the flow of advertising budgets to participants in digital advertising upholding an industry regulated framework for Brand Safety.

In order to enable companies to promote a brand safe environment, the TAG Brand Safety Certification Working Group maintains the Brand Safety Certified Guidelines. Companies that are shown to abide by the Brand Safety Certified Guidelines can achieve the Brand Safety Certified Seal and use the Seal to publicly communicate their commitment to minimizing ad misplacement and fostering an environment of trust in the marketplace.

ABOUT TAG

TAG (the Trustworthy Accountability Group) is the leading global certification organization fighting criminal activity, promoting Brand Safety and increasing trust in the digital advertising industry. TAG's mission is to:

- Eliminate fraudulent traffic;
- Combat malware;
- Promote Brand Safety;
- Enable transparency in digital advertising.

TAG advances those initiatives by bringing companies across the digital advertising supply chain together to set the highest standards.

TAG is the first and only registered Information Sharing and Analysis Organization (ISAO) for the digital advertising industry.

To learn more about the Trustworthy Accountability Group, please visit www.tagtoday.net.

EXECUTIVE
SUMMARY

Keyword exclusion lists are meant as a brand safety mechanism for advertisers, to protect them from associations with content that has been determined to be unsafe by the advertiser. In theory, it seems logical and simple to employ keyword exclusion lists in campaigns. In practice, however, these exclusion lists are incredibly blunt instruments for achieving brand safety goals and have a myriad of unintended consequences for reach and distribution of digital advertising campaigns.

Enforcement for keyword exclusion lists happens at the URL level, most frequently representing the title of the article, but without any contextual awareness of how the word is being employed within the content of the article. Adding "Shot" or "Shoot" to a keyword exclusion list, for example, may prevent a brand from associations with certain content which glorifies violence. At the same time, the lack of contextuality would also prevent distribution alongside content about golf, or basketball, or photography, or a popular talent show where a contestant is "taking their big shot", etc.

The digital advertising industry needs to rethink how keyword exclusion lists are utilized. This document is intended to assist companies complying with TAG's Brand Safety Certified program requirements and provides best practices for the creation and maintenance of keyword exclusion lists.

TAG strongly encourages other companies to consider and implement these best practices, in order to facilitate change in how the industry utilizes keyword exclusion lists.

BEST PRACTICES FOR
KEYWORD EXCLUSION LISTS IN GENERAL

If your company does not have established roles and responsibilities, as well as policies and procedures, to ensure the effective creation and maintenance of keyword exclusion lists, then TAG strongly recommends that your company does not use keyword exclusion lists. Content validation tools and services have the capacity to understand content and the context of that content at a depth and precision that keyword exclusion lists can never achieve. Companies should consider leveraging effective content validation tools to maximize brand safety, suitability, and assurance.

TAG's Keyword Exclusion List Toolset (KELT) offer companies with additional opportunities for tracking and enforcing these processes. KELT provides the responsible individuals and teams with the relevant metadata needed for maximum context when evaluating keyword exclusion lists, as well as for effective management of those lists.

KEYWORD EXCLUSION TOOLSET

In March 2023, TAG held an Evolution Session focusing on the effects of content taxonomies and keyword blocking in brand safety. Based on feedback from that session, as well as follow up research and interviews with the broader TAG community, TAG has developed new keyword exclusion list tools, designed to:

- Facilitate change in how keyword exclusion lists are developed, managed, and used throughout the digital advertising industry.
- Provide additional value to TAG members by streamlining maintenance of their keyword exclusion lists.
- Deepen industry education on the impact of keywork exclusion lists.
- Unlock brand-safe opportunities for advertisers and publishers that are currently lost.

KEYWORD EXCLUSION LIST

Although keyword blocking has certain limitations, there are certain keywords that can be an excellent proxy for how those words will be used within the narrative of the content. In consultation with a broad range of digital advertising companies and the TAG Community, TAG has developed a core set of keywords which should always be included in keyword exclusion lists.

TAG's Keyword Exclusion List (KEL) Tool is included as part of the Exclusion List Maintenance Tool, which is described in the section "TAG's Exclusion List Maintenance Tool." TAG encourages companies to use the keywords in the Keyword Exclusion list Tool as a foundation for new keyword exclusion list and for when reconsidering the effectiveness of current keyword exclusion lists. TAG does not recommend simply adding these keywords to an already existing keyword exclusion list. The "Best Practices for Managing Keywords in Keyword Exclusion Lists" section features additional best practices for managing keyword exclusion lists, including the addition of new keywords.

TAG recommends that companies consider replacing their current keyword exclusion lists with KEL, and then evaluate additional keywords based on best practices.

KEL v1 contains keywords which are indicative of content that is either highly sexual, derogatory, or gratuitous in nature.

EXCLUSION LIST MAINTENANCE TOOL

TAG's Exclusion List Maintenance Tool (ELMT) is a spreadsheet that can be imported across multiple Office suites and cloud platforms. The tool establishes a new standard for keyword exclusion lists, by adding fields for metadata, such as; date-added, expiration-date, and notes. This allows companies to have the context needed for the maintenance of keyword exclusion lists and simplifies those processes. In fact, this tool can be easily expanded to manage most exclusion and inclusion lists; keyword, URL/domain, App/BundleID, content-category, etc.

A "Live Keyword Exclusions" tab allows access to the keywords and associated keyword exclusion lists the company is utilizing currently, as well as to simplify exporting keyword exclusion lists for external partners and internal stakeholders.

The "Working Submissions" tab allows for collaboration and tracking for requested additions to the keyword exclusion lists, and by whom.

The "Working Removals" tab allows for collaboration and tracking of keywords requested to be removed from keyword exclusion lists, and by whom.

The "Expired Keywords Archive" tab allows for a library of keywords that the company has excluded in the past, but has not rejected.

The "Rejected Keyword Archive" tab allows for a library of keywords that the company has decided not to include in their keyword exclusion lists, as well as for tracking when and why those decisions were made.

The "Export Tab" allows for simple exporting of keyword exclusion lists for internal stakeholders and external partners.

BEST PRACTICES FOR KEYWORD EXCLUSION LISTS

Which is this document, designed to provide education to the digital advertising industry about the risks associated with keyword exclusion lists, and techniques for maximizing the effectiveness of exclusion lists – when needed – as well as their maintenance and upkeep.

BEST PRACTICES FOR **KEYWORD** EXCLUSION LISTS **ROLES AND** RESPONSIBILITIES

During 2023, TAG conducted a series of interviews with Brand Safety Certified companies regarding their practices for keyword exclusion lists. In some cases, keyword exclusion lists are assigned to new or junior team members, and those team members are generally responsible for adding keywords to the list when told to do so, but without clear processes for reviewing and managing existing keywords on the exclusion list. Meaning, once a keyword was added to the exclusion list, it effectively remained there indefinitely, and there is little tracking as to when or why a keyword as added.

TAG's Brand Safety Certified guidelines require that certified companies define and identify the roles and resources which are used to maintain and ensure compliance with the guidelines. This includes the management of keywords lists for either exclusion and/or for inclusion, as well as documenting the internal individuals or teams authorized to request that keywords be added or removed from exclusion lists.

Companies who do not hold TAG's Brand Safety Certified seal are strongly encouraged to consider the same, but at the very least, empower an individual or team ultimately responsible for ensuring that internal keyword exclusion list policies and procedures are developed, implemented, and executed.

BEST PRACTICES FOR **KEYWORD** EXCLUSION LISTS **POLICIES AND** PROCEDURES

TAG's Brand Safety Certified guidelines require that keyword list(s) for exclusion and/or for inclusion, must be reviewed as part of a company's quarterly internal review process. Companies must develop and document standard-operating-procedures to ensure that:

- An individual or team is empowered as responsible for managing and distributing keyword exclusion lists, and to enforce procedural compliance.
- Keyword exclusion lists and keyword inclusion lists are not in conflict with each other. Procedures should prioritize the removal of keywords from exclusion lists if those keywords are on inclusion list, as well as for the distribution of the updated keyword exclusion lists to internal stakeholders, and external partners as necessary.
- Keyword exclusion lists are aligned with the company's strategic goals and objectives concerning brand-safety and suitability, and that effective means for communication of these goals and objectives are established between the individual/team responsible for keyword exclusion lists, marketing, management, sales, etc.
- Keyword exclusion lists include the metadata needed to ensure efficient management.
- The company has an objective review and evaluation process for reviewing all keywords on their exclusion list, which should involve a keyword review team, to reach consensus on which keywords should and should not remain on the list(s).
- Roles and responsibilities in the section "Best Practices for Keyword Exclusion Lists"in General are documented and clearly defined.
- Internal stakeholders are educated on updated procedures and workflows regarding keyword exclusion lists.

TAG's Keyword Exclusion List Tool can help companies and their responsible individual or team to streamline many of these processes.

BEST PRACTICES FOR
KEYWORD
EXCLUSION LISTS
METADATA

Without context, maintaining keyword exclusion lists can be incredibly burdensome. Companies using exclusion lists should establish or adopt exclusion list templates, such as TAG's Keyword Exclusion list Tool, which add fields for metadata to be associated with each keyword. At a minimum, this metadata should include for each keyword:

- Date-added
- Expiration-date

It is recommended that a 'Notes 'field also be included, to track decisioning and other information about a keyword. Considering the pace of the news-cycle, attention-spans, and society-at-large, expiration-dates for keywords should rarely be longer than 12 months. Although this metadata may not be actionable by external partners at this time, it empowers companies with the information necessary for effectively and efficiently maintaining their keyword exclusion lists.

Companies with existing keyword exclusion lists should copy their existing keywords into such keyword exclusion list templates and associate all keyword metadata accordingly. For example, a date-added of the date the keywords were copied over, an expiration-date for 6 months later, and a Note or Reason of "Legacy". This allows for legacy keyword exclusion list entries to be easily identified for re-evaluation by the responsible individual or team and establishes a foundation for ongoing tracking and maintenance for newly added entries.

BEST PRACTICES FOR **MANAGING** KEYWORD IN **KEYWORD** EXCLUSION LISTS

As mentioned previously, keyword exclusion lists can have large-scale unintended consequences. Therefore, it is vital that each company develop and document an objective review process to determine which keywords are included in keyword exclusion lists.

The broader effects of keyword exclusion must always be considered when adding keywords to an exclusion list. However, there are some instances where a company may decide it is prudent to block certain keywords for brand safety, for example:

- Name(s) of company executives, employees, board members, etc., in cases of negative publicity.
- Name of the company, or names of company products and/or services, in cases of negative publicity.
- Keywords that may generate an association of a risk with a use of product or service offered by the company, such as:
    - "Housefire" for a company that makes heating appliances.
    - "Overdose" for a pharmaceutical company or drug-store retailer.

Keywords that a company selects for exclusion should be carefully considered and based on documented policies and procedures, as well as the company's marketing and strategic goals. Only keywords which are highly targeted to minimize the exclusion lists impact beyond brand safety should be included in keyword exclusion lists.

Companies should avoid excluding keywords which have a disproportionate impact on those companies participating in responsible journalism or representing diverse communities.

BEST PRACTICES FOR **MANAGING** KEYWORD **EXCLUSION LISTS**

Companies holding TAG's Brand Safety Certified Seal are required to include keyword exclusion lists in their internal quarterly reviews, and those companies must use this opportunity to maintain their keyword exclusion list. The processes for keyword exclusion list maintenance should include, but not be limited to, the following:

- Removal of all keywords that are passed their expiration-date.
- Review with internal stakeholders regarding potential updates or changes to the company's brand safety policy or strategic goals.
- Review and analysis of all remaining keywords for applicability with company brand safety policy and strategic goals.
- Distribution of updated keyword exclusion lists to all necessary stakeholders and external partners.

Other companies should consider the same, but at the very least, empower an individual, or team, as ultimately responsible for ensuring that internal keyword exclusion list are maintained effectively.

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