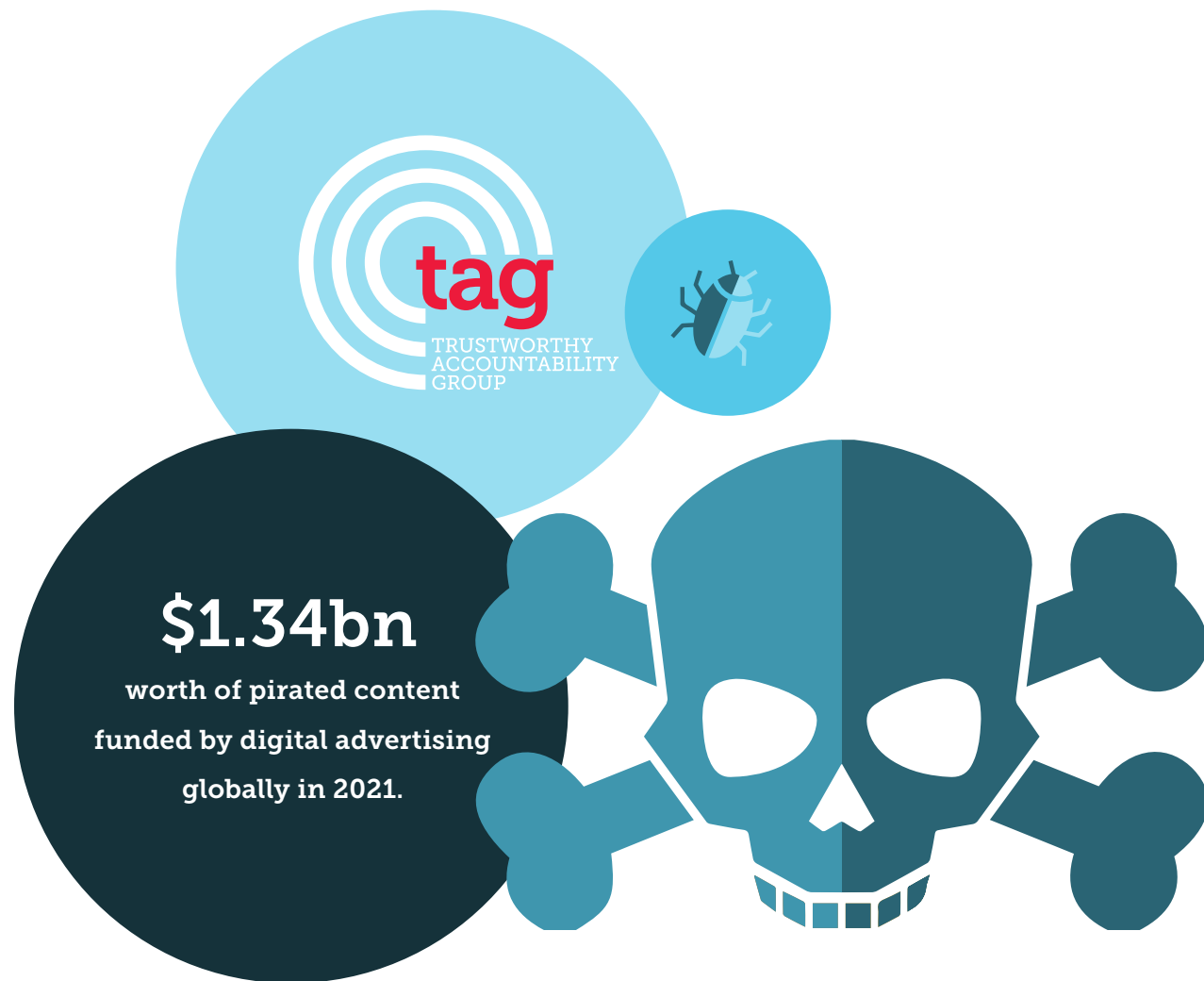


2022 ANNUAL REPORT ON  
TAG'S PROJECT BRAND INTEGRITY:

# Combating Ad-Supported Piracy Across Europe

01

# EXECUTIVE SUMMARY

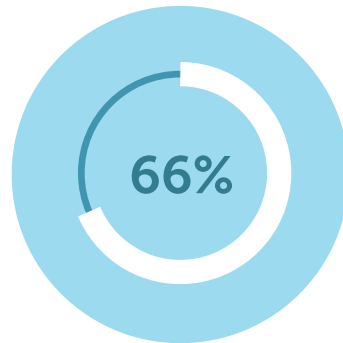


Ad-supported piracy is an ongoing challenge for the digital advertising industry. According to an August 2021 [report](#) from the [Digital Citizens Alliance \(DCA\)](#) and [White Bullet](#), **digital advertising funds US\$1.34bn worth of pirated content globally**. That number would be considerably higher had the digital advertising industry not been working proactively and collaboratively to fight ad-supported piracy over recent years.

The [Trustworthy Accountability Group \(TAG\)](#) is at the forefront of this challenge, working closely with companies right across the global digital advertising industry to reduce and prevent ad-supported piracy. Along with specific company efforts, its anti-piracy standard helped to drastically [reduce](#) ad-supported piracy in the US.

While TAG's anti-piracy standards set the bar for the entire digital advertising industry to prevent ad-supported piracy, operators of pirate websites still sometimes manage to procure advertisements on their undesirable media properties – often through fraudulent means. To assist advertisers in such situations, TAG [established](#) Project Brand Integrity (PBI) in February 2019 as a partnership with UK anti-piracy and brand safety specialist, [White Bullet](#). PBI seeks to protect brands from unwanted association with digital content theft by alerting advertisers or their agencies to ads running on high-risk websites and those that infringe intellectual property (IP) in Europe.

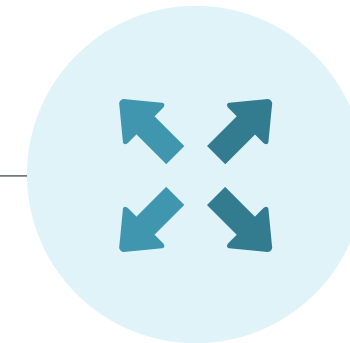
In this first annual report, key findings and future actions include:



Following contact and engagement between the advertiser and TAG, the average monthly advertising spend on websites that infringe IP from 84 brands has decreased by 66%.



To date, 79% of the brands approached by TAG as part of PBI (84 out of 106) have reduced their ad impressions on websites that infringe IP; nearly half of these have done so by 99%.



TAG has set a course of action for 2022 with the aim of further increasing the efficacy of PBI. This includes the **establishment of a robust process to engage with advertisers that have – to date – been unresponsive.** Repeat offenders will be mentioned in future reports as well as be referred to the European Commission for recommendation to be included in its Counterfeit and Piracy Watch List.

02

# BACKGROUND

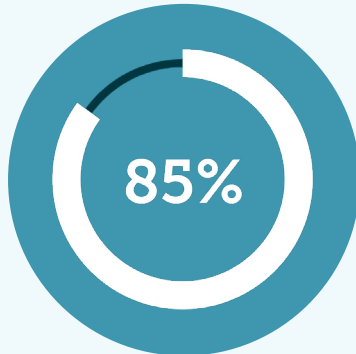


Ad-supported piracy is a major brand safety issue inside and outside of the digital advertising supply chain. Digital advertising that appears next to pirated content harms legitimate content distributors and creators by financially rewarding the publishing of stolen content. As well as the obvious brand safety issues for advertisers, pirate sites are also linked to the presence of malware which is harmful to consumers. According to both the [US](#) and [UK](#) Brand Safety Consumer Research, **almost 81% of consumers said they would reduce spend by 50% or more of a consumer product** if they discovered the ad for that product had infected their computer or mobile device with a virus.

The anti-piracy requirements of the TAG Certified Against Piracy Programme are now part of TAG's broader [Brand Safety Certified](#) standard aimed at significantly reducing risk of misplacement of advertising on digital media properties of all types (see Annexes One and Two). The standard is underpinned by robust consumer research conducted by TAG and the [Brand Safety Institute \(BSI\)](#):



In [December 2020](#), a large majority of US consumers said it is important for advertisers to make sure their ads don't appear near dangerous, offensive, or inappropriate content; and

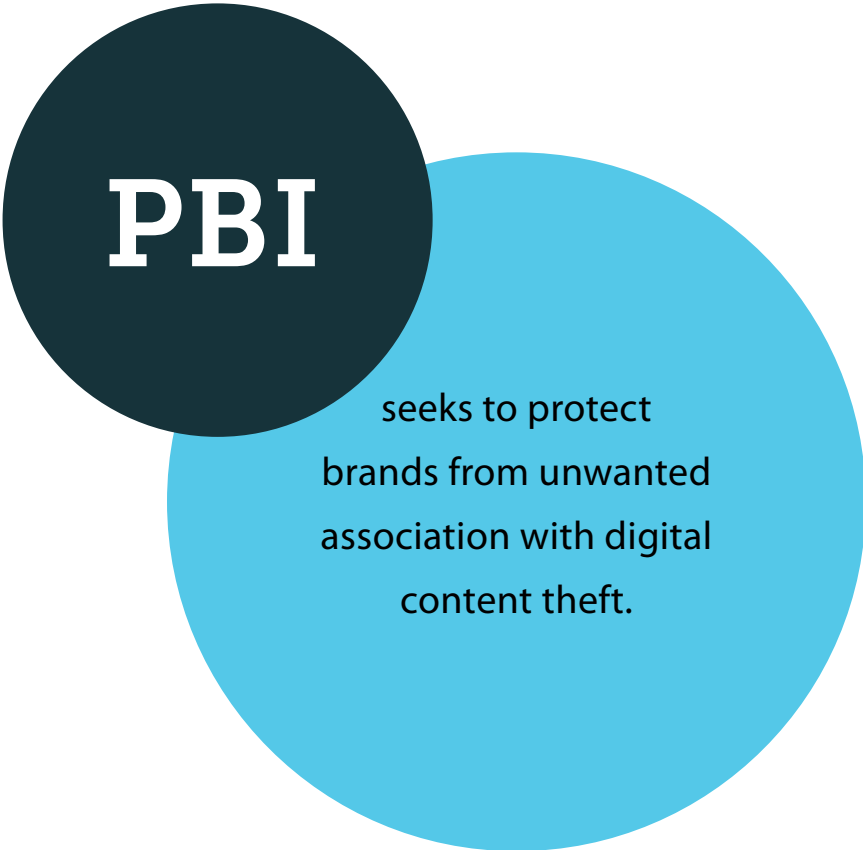


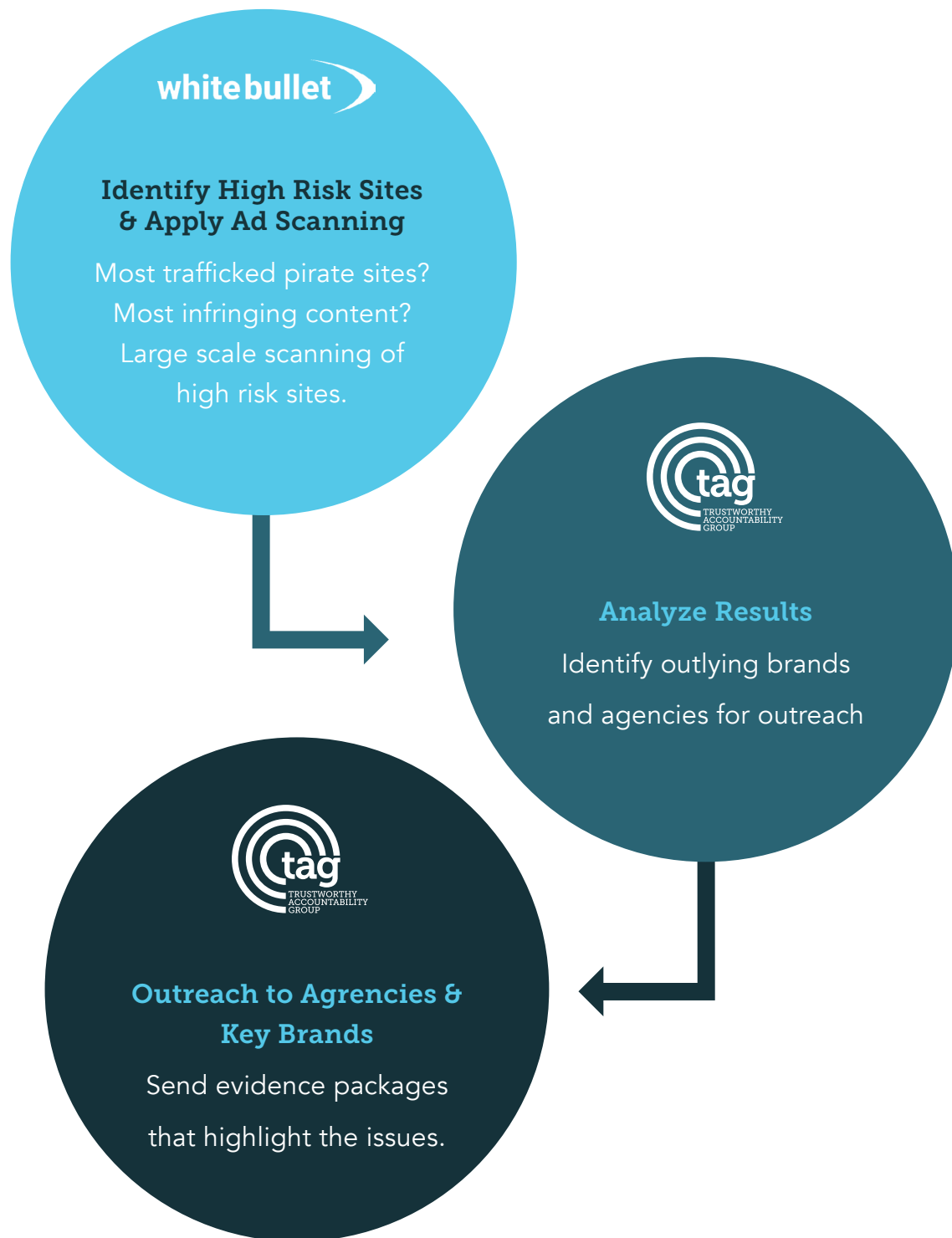
In [May 2021](#), more than 85% of UK consumers said they would reduce or stop purchasing products they buy regularly if they discovered an ad for that product had run next to hate speech, malware, illegal content, or terrorist recruiting materials.

As of 19 April 2022, **128 companies have achieved TAG’s Brand Safety Certified Seal**, with **47%** of them (57) **applying the standard to their global operations.** (See Annex Two.)

While TAG’s Anti-Piracy requirements set the bar for the entire digital advertising industry to prevent ad-supported piracy, operators of pirate websites still sometimes manage to procure advertisements on their undesirable media properties – often through fraudulent means. In order to assist advertisers in such situations, TAG [established](#) Project Brand Integrity (PBI) in February 2019 as a partnership with UK anti-piracy and brand safety specialist, [White Bullet](#). PBI seeks to protect brands from unwanted association with digital content theft by alerting advertisers or their agencies to ads running on high-risk websites and those that infringe IP in Europe.

PBI’s direct engagement with brands and their agencies complements TAG’s Brand Safety Certified standard as well as other industry and public policy efforts, such the [Memorandum of Understanding \(MoU\) on Online Advertising and Intellectual Property Rights \(IPR\)](#) facilitated by the European Commission in 2018.





Through PBI, TAG and White Bullet partner in employing the following protocols:

- White Bullet identifies and monitors the European digital advertising marketplace to help determine cases of display advertisements on high-risk websites or ones that infringe IP.
- TAG then discreetly notifies advertisers - or their agencies - when more than 250,000 of their ad impressions are discovered on on website that infringe IP within a three-month period. This is done privately and confidentially.
- TAG provides the advertiser or agency with further information on ways they can mitigate the risks, such as adhering to TAG's Brand Safety Certified standard.

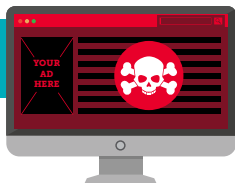




whitebullet Analysis Period: <<Date Range>>

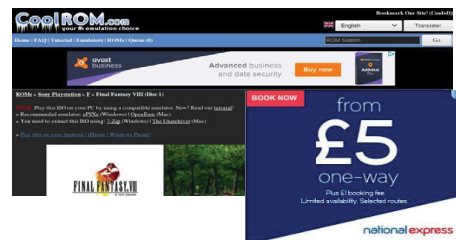
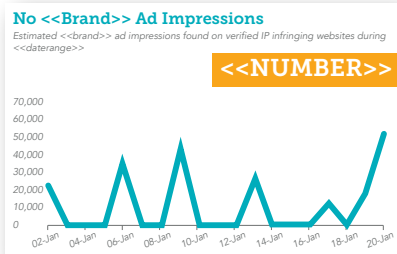
# Project Brand Integrity << BRAND >>

Preventing ad placement on websites that facilitate distribution of pirated content

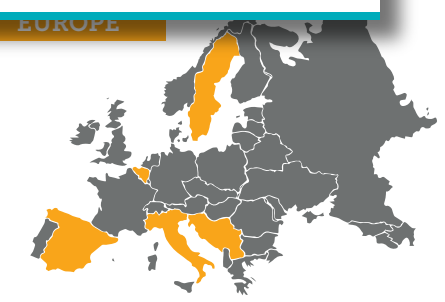


<<BRAND>> advertising is appearing on high risk IP infringing websites.

- White Bullet - a TAG anti-piracy validated DAAP - found <<x>> <<Brand>> ad(s) on IP infringing websites during <<date range>> served locally in European counties.
- Over <<x>> impressions are estimated to have been served in this period.
- Over 5,000 websites in the ad monitoring samples have been independently verified to be repeat destinations for infringing content.



**Screenshot & Website Popularity**  
<<Brand>> was found on <<website>>, a popular high risk IP infringing website with an Alexa Global Rank of <<AlexaRank>> and a White Bullet IPI Index™ risk score of <<IPIRiskScore>>



**Countries Where <<Brand>> Advertising was Found**

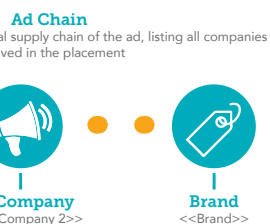
<<Country>>  
<<Country>>  
<<Country>>

whitebullet Analysis Period: <<Date Range>>

## Project Brand Integrity << BRAND >>

Preventing ad placement on websites that facilitate distribution of pirated content

<<BRAND>> advertising is appearing on high risk IP infringing websites.



This is the first annual report since PBI's launch in February 2019. It outlines:

- The state of the digital advertising industry's fight in tackling ad-supported piracy;
- Key findings regarding PBI's impact;
- The changing nature of ad-supported piracy;
- Future developments for PBI; and
- Four key steps the digital advertising industry can take to stop ad-supported piracy.

03

# STATE OF THE FIGHT: AD-SUPPORTED PIRACY



**1 in 3**

pirate websites and apps  
exposed consumers  
to fraud and malware  
capable of stealing  
private information

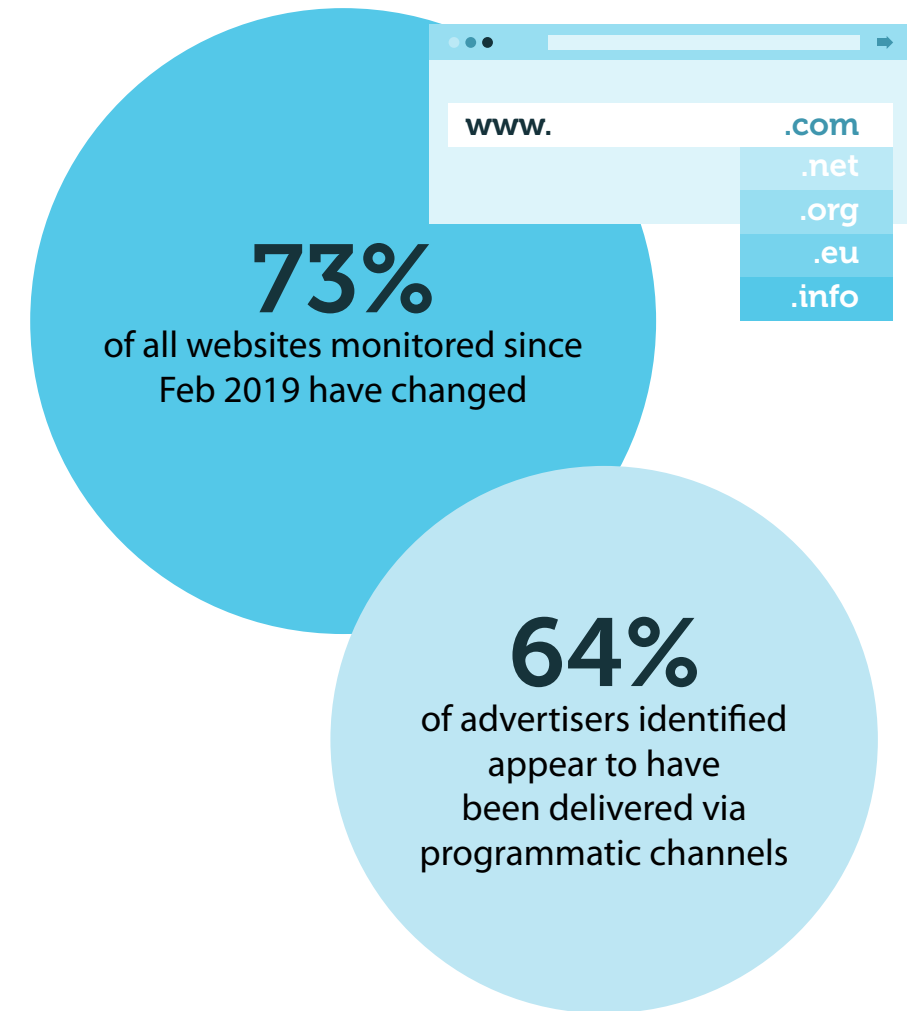


Ad-supported piracy can take many forms. It can occur via websites or in-app environments, through social networks, P2P communities, storefronts, and even pirate subscription services. Regardless of type, misplaced advertising that appears beside pirated content harms content creators and legitimate content distributors by providing economic resources that fuel these illegal enterprises.

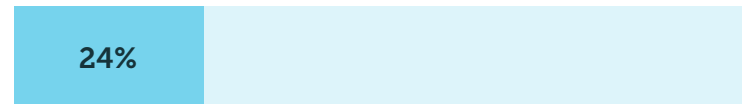
In addition to the threat ad-supported piracy poses to legitimate content creators and distributors, people who view pirated content are much more likely to be infected with malware than those that do not. The [DCA report](#) from August 2021 revealed that roughly one in three pirate websites and apps exposed consumers to fraud and malware capable of stealing private information.

TAG's PBI initiative seeks to analyse the status of ad-supported piracy in Europe. In the last three years, two trends come into clear focus:

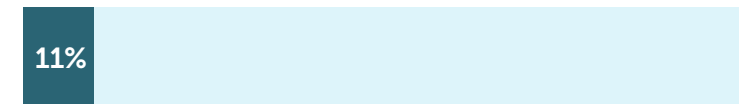
- 1. Piracy domains are rapidly changing:** 73% of all the websites monitored since February 2019 have changed, by re-directing to a different domain, using mirrors or proxy websites, or becoming inactive. This demonstrates the dynamism of the piracy ecosystem and the need for real-time tools that assess the piracy risk.
- 2. Ad delivery on pirate websites is evolving:** In 2021, 64% of the advertisers identified on high risk or IP infringing websites appear to have been delivered via *programmatic* channels (i.e., through the use of automated algorithms and technology to match ads to ad space), usually involving an ad agency and several technology partners. This remains the focus of PBI, with outreach to agencies and brands.



However, it should be noted that advertising may be placed through other channels where no agency is involved and where the brand is not directly involved in placing the ad:



24% of advertiser impressions appear to have come solely via affiliate marketing channels (i.e., via a marketing arrangement whereby an online retailer pays a third-party website for traffic generated to its own website via a commission on sales or traffic generated) and likely without agency involvement; and



11% of advertising impressions are sponsored content (i.e., a form of content marketing in which advertisers pay a website to publish material, which either closely resembles the editorial content of the website or seeks to induce clicks to such content by offering topical or catchy headlines and images) which is delivered through a dedicated sponsored content platform.

Whilst there may be overlap between these channels, this demonstrates the need to monitor changes in the ecosystem and adapt with new strategies where required.

This presents the digital advertising industry with ongoing challenges, including the need for awareness of the changing nature of ad-supported piracy, and the need to stay ahead of emerging threats. PBI and TAG's evolving standards seek to address them.

In 2019, TAG published its [white paper](#) – Winning the Fight Against Ad-Supported Piracy – setting out the challenges, successes, and best practices. This report – as well as future ones – builds on the White Paper.

**tag**  
TRUSTWORTHY  
ACCOUNTABILITY  
GROUP

## WINNING THE FIGHT AGAINST AD-SUPPORTED PIRACY:

Successes, Challenges and Best Practices

- U.S. on pirate sites at volume; representing a 90% decrease from just 2 years ago;
- Ad revenue flowing to pirate sites has been reduced by between 48 and 61 percent; and
- Industry leaders are stemming the flow of ad revenue to mobile apps with pirated content.

Advertisers and their agencies should institute best practices that have already been proven effective to increase brand safety and stopping ad-supported piracy:

the digital advertising industry has had great success to date, awareness of the evolving nature of ad-supported piracy is key to staying ahead of emerging threats. This is particularly true with regard to the unique challenges of combatting illegal streaming devices (ISDs) and the need to "follow the money" in Europe and beyond. TAG and other key industry partners have already mobilized to begin addressing those issues.

2 | Winning the Fight Against Ad-Supported Piracy

Take Responsibility and Communicate Your Commitment

Choose the Right Partners

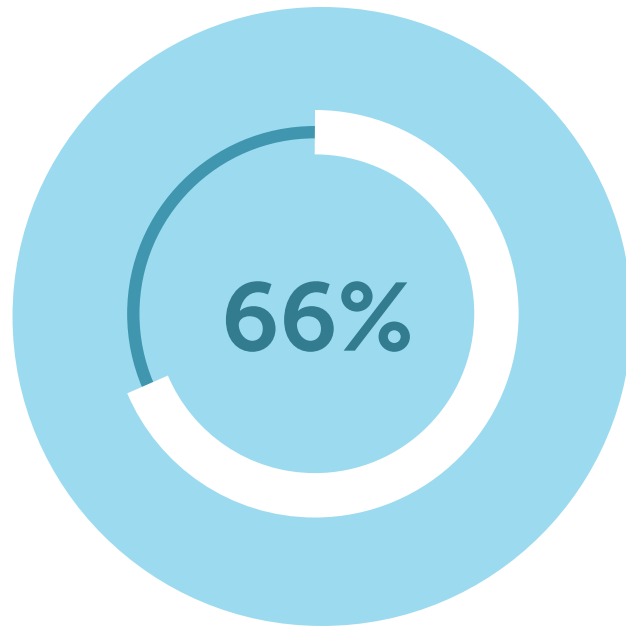
Employ the Right Tools

Work Closely with Partners to Develop and Execute Your Strategy

Hold Partners Accountable through Contracts and Agreements

04

# KEY FINDINGS FROM PBI'S FIRST TWO YEARS



Whilst there continues to be challenges, PBI is making a significant impact on ad-supported piracy:

- 1. Following contact and engagement between the advertiser and TAG, the average monthly advertising spend on websites that infringe IP from 84 brands has decreased by 66%.**

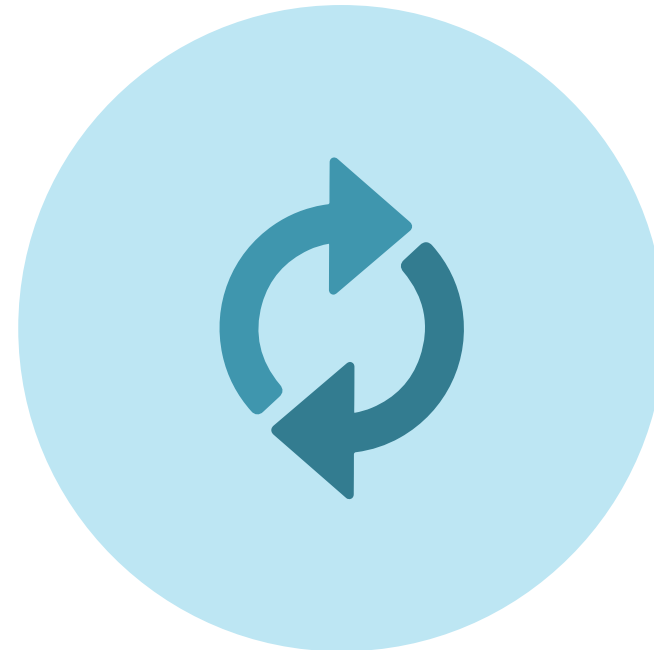
Of the 106 brands that have been approached by TAG since February 2019 (either directly or via their agencies), 84 (79%) have reduced their ad impressions on websites that infringe IP.





**2. To date, 79% of the brands approached by TAG as part of PBI have reduced their ad impressions on websites that infringe IP; nearly half of these have done so by 99%.**

45 (43%) of these have reduced their ad impressions by over 99% on websites that infringe IP.



**3. PBI will continue to evolve with moving ad-supported piracy threats: as piracy domains constantly change, ad delivery on pirate sites does as well.**

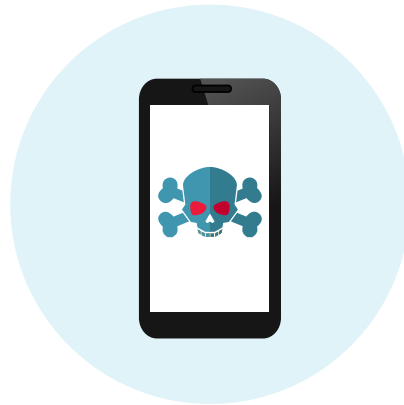
TAG will introduce a series of changes to do this, including extending PBI's scope to mobile applications as well as encouraging brand advertisers themselves to be more vigilant.

05

# THE FUTURE OF PBI



In 2022, TAG plans to further increase the efficacy of PBI in a number of ways:



**PBI will begin to monitor the state of ad-supported piracy in mobile applications and contact relevant advertisers (or their agencies).**

To date, PBI has focused on desk-top sites that are high-risk or infringe IP.



**TAG will establish a robust process to engage with advertisers that have – to date – been unresponsive.**

Repeat offenders will be mentioned in future reports as well as be referred to the European Commission for recommendation to be included in its [Counterfeit and Piracy Watch List](#).



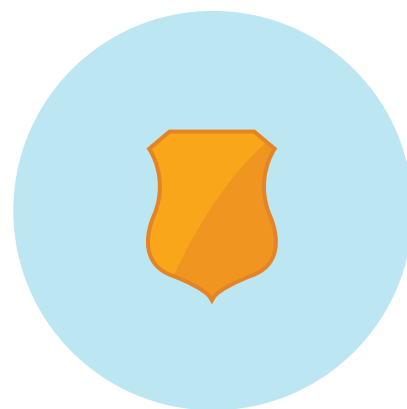
**TAG will seek to raise greater awareness of ad-supported piracy amongst brand advertisers.**

TAG will re-enforce the need for buyers to incorporate anti-piracy measures into their brand safety plan, as well as requiring the same for their advertising partners.

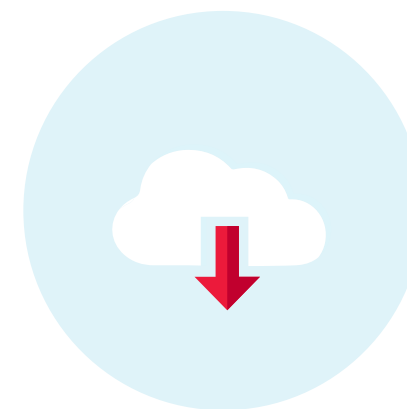


**TAG Brand Safety Certified brands and agencies with client brands, that are non-compliant with repeat notices under the PBI programme, will be submitted to the TAG process for allegations of non-compliance and appeal.**

This may result in loss of TAG Brand Safety Certification seal.



**TAG will continue to engage with law enforcement agencies, such as the City of London's Police Intellectual Property Crime Unit (PIPCU), and policymakers, such as the European Commission and the UK Intellectual Property Office (IPO).**



**TAG will publish annual PBI reports, outlining its progress as new challenges emerge.**

The annual reports will also update guidance for the digital advertising industry in combating the issue.

06

# FOUR STEPS TO TAKE TO TACKLE AD-SUPPORTED PIRACY

Building on its successes to date, the digital advertising industry can take the following steps to reduce the risk of ad-supported piracy:



## **Adopt and develop a 'Zero Tolerance' Strategy**

**The digital advertising industry should not be funding criminal activity. It harms both legitimate content creators and distributors, poses brand safety risks to brand advertisers, and risks the distribution of malware ('malvertising') amongst consumers.**

**Advertisers and agencies should only work with companies that are meeting robust industry standards such as TAG's Brand Safety Certified standards).**

Developing a 'zero tolerance' approach to ad-supported piracy helps brands avoid reputational damage from ad placement on websites and other media properties that facilitate the distribution of pirated content or counterfeit products. This commitment should be reflected in contracts or other agreements with partners.

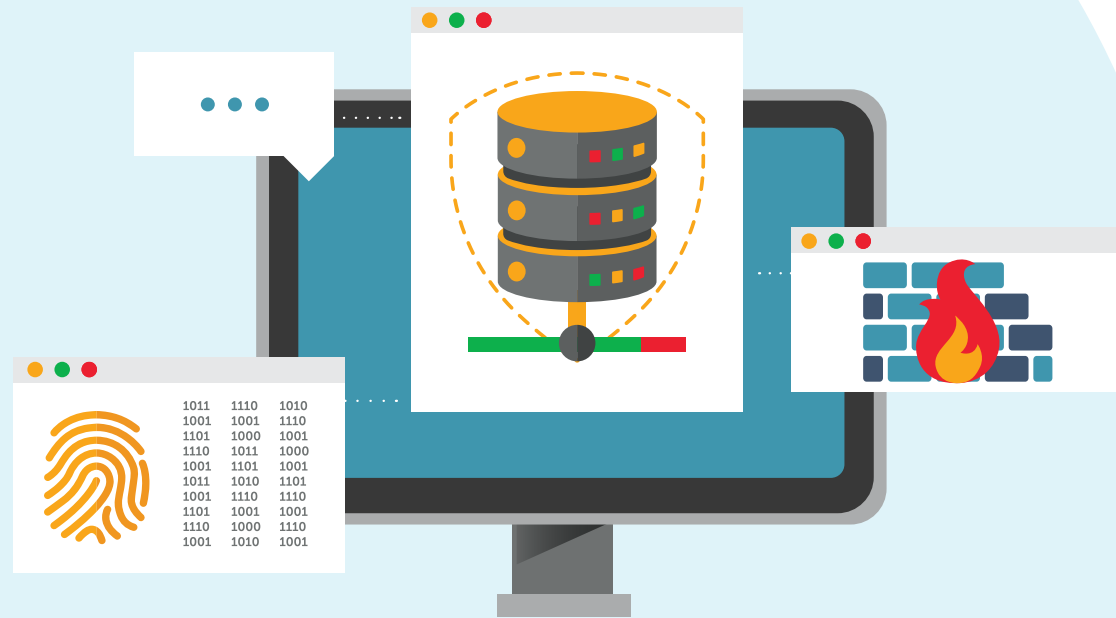
**All companies operating in the digital advertising sector should have an internal focus and deploy dedicated resources to keep their ads away from pirate sites.**

Companies should create an internal Brand Safety team to monitor issues of ad-supported piracy as well as other brand safety threats (e.g., ad fraud and malware). Individuals in the team should consider becoming a [Certified Brand Safety Officer](#).

The Brand Safety team should offer and conduct regular trainings to ensure a company's wider staff understand the negative impact of ad-supported piracy (and other brand safety issues) as well as how to mitigate the problem. The Brand Safety Team should communicate this approach clearly throughout the organisation as well as to advertising partners.



**Foster Greater Internal  
Responsibility & Education**



## Adopt Industry Standards & Technical Tools

**Advertisers should ensure that they, their agency or agencies, and all digital ad partners are using all the tools and industry self-regulatory efforts, such as TAG's Brand Safety Certification standard, to reduce the risks of their ads appearing on sites that infringe IP.**

Some companies may adopt a minimal approach, such as only using government-approved exclusion lists of sites that infringe IP. However, advertisers and agencies should look at how a broader risk-based approach - as set out in TAG's Brand Safety standard - can minimise the reputational risk to their clients / brands.

A company should consider working with an anti-piracy or brand safety specialist that can verify traffic, detect sites that infringe IP and that can offer both pre-bid avoidance and post-bid blocking.



**Building on the Zero Tolerance strategy, all companies operating in the digital advertising sector should hold partners to account via contracts and agreements. This is a specific requirement of Brand Safety Certification standard (see Annex One).**

Agreements and / or contracts should include guidelines prohibiting partners from placing ads on any site that (a) infringes IP; (b) induces, facilitates, promotes, or enables the financial benefit from IP infringement; (c) promotes or facilitates illegal activities, and should include terms that preserve the right to withhold payments on any disputes.



**Ensure Accountability**

07

# Conclusion





Since February 2019, Project Brand Integrity has added significant value in helping the digital advertising sector address the challenge of ad-supported piracy. In particular, PBI has:

- **Reduced the monthly advertising spend on websites that infringe IP by 66% from 84 out of the 106 brands TAG has engaged with.**
- **Helped 79% of the brands approached (106) as part of this process to reduce their ad impressions on websites that infringe IP.**

As PBI progresses, TAG will continue to research, develop and implement new strategies to address these emerging challenges, including extending the scope to mobile applications as well as encouraging brand advertisers themselves to be more vigilant.

08

# ANNEX ONE



## Requirements of the TAG Brand Safety Certified Standard

Requirements	Scope	Direct Buyer	Direct Seller	Intermediary	Content Verification Service	Anti-Piracy Service Provider
Complete TAG Registration and be a TAG member in Good Standing	Administrative	●	●	●	●	●
Have a designated TAG Compliance Officer	Administrative	●	●	●	●	●
Complete Brand Safety Certified Training annually	Administrative	●	●	●	●	●
Ensure All Digital Advertising Agreements Adhere to Brand Safety and Anti Piracy Principles	Brand Safety and Anti-Piracy	●	●	●		
Monitor and Detect Ad Misplacement	Brand Safety and Anti-Piracy	●	●	●		
Document Policies and Procedures to Minimize Ad Misplacement	Brand Safety and Anti-Piracy	●	●	●		
Employ Pirate Mobile App Filtering	Anti-Piracy	●		●		●
Adhere to Content Verification Requirements	Brand Safety				●	
Adhere to Anti-Piracy Requirements	Anti-Piracy					●

09

# ANNEX TWO



# Companies that have achieved TAG's Brand Safety Certified Seal:

(as of 19 April 2022):





[tagtoday.net](http://tagtoday.net)



-Tech Partner-

[white-bullet.com](http://white-bullet.com)