PROGRAMMATIC AD SPEND IN THE AGE OF COVID-19

A MOBILE IN-APP ANALYSIS: MARCH 2020

- U.S. ad spend trends
- Category movers & shakers
- App risers & fallers

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PROGRAMMATIC IN THE AGE OF COVID-19

As a result of COVID-19, March 2020 led the digital programmatic advertising industry into uncharted waters. The resulting sea change in consumer media consumption patterns, combined with global economic turmoil, altered many ad investment strategies. This report looks at how advertisers adjusted across the mobile in-app ecosystem.

Pixalate is sharing this data not to impugn the standing or reputation of any person, entity or app, but, instead, to report data pertinent to programmatic advertising activity across Android and iOS apps in the time period studied.

PROGRAMMATIC MOBILE APP AD SPEND DROPS 14% IN MARCH

PROGRAMMATIC AD TRANSACTIONS IN MARCH 2020; COMPARES FIRST FULL WEEK TO LAST FULL WEEK; AS MEASURED BY PIXALATE

-14% mobile app **programmatic ad spend** in March 2020

-97% ad spend to **'Medical'** apps on Android

+122% ad spend to **'Parenting'** apps on Android

-95% ad spend to major sports apps including **ESPN & NBA**

+20% ad spend to **'News'** apps on iOS

+97% ad spend to **'Food & Drink'** apps on iOS

MOBILE APP AD SPEND DROPS 14%

PROGRAMMATIC AD TRANSACTIONS IN MARCH 2020; ANDROID AND IOS COMBINED; AS MEASURED BY PIXALATE

14% decrease
in programmatic
ad spend

(first week vs. last week, March 2020)
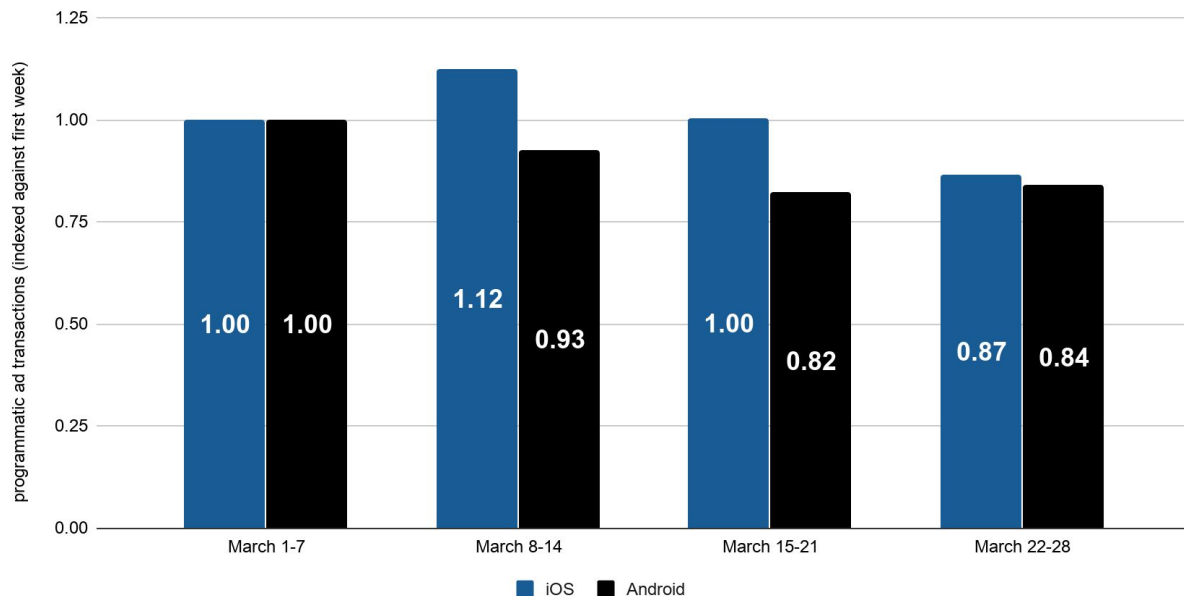
ANDROID AD SPEND DROPS 16%, iOS 13%

PROGRAMMATIC AD TRANSACTIONS IN MARCH 2020; COMPARES FIRST FULL WEEK TO LAST FULL WEEK; AS MEASURED BY PIXALATE

16% decrease

13% decrease

AD SPEND GROWTH

'Parenting' apps skyrocket 122%
March 1-7 vs. March 22-28

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iOS: KY/TN NEWS APPS LEAP OVER 1K%

PROGRAMMATIC AD TRANSACTIONS IN MARCH 2020; COMPARES FIRST FULL WEEK TO LAST FULL WEEK; AS MEASURED BY PIXALATE

| Icon	Title	% change (first week vs. last week of March)
	WKYT News	+1,635%
	WBIR News	+1,434%
	2 For 2	+747%
	Crosswords With Friends	+576%
	Talking Ginger 2	+527%

Top 5 apps w/ biggest increase in ad spend

first week of March vs. last week of March

iOS: 'SHOPPING' CATEGORY SPEND NEARLY TRIPLES

PROGRAMMATIC AD TRANSACTIONS IN MARCH 2020; COMPARES FIRST FULL WEEK TO LAST FULL WEEK; AS MEASURED BY PIXALATE

% Change in Ad Spend

first week of March vs. last week of March
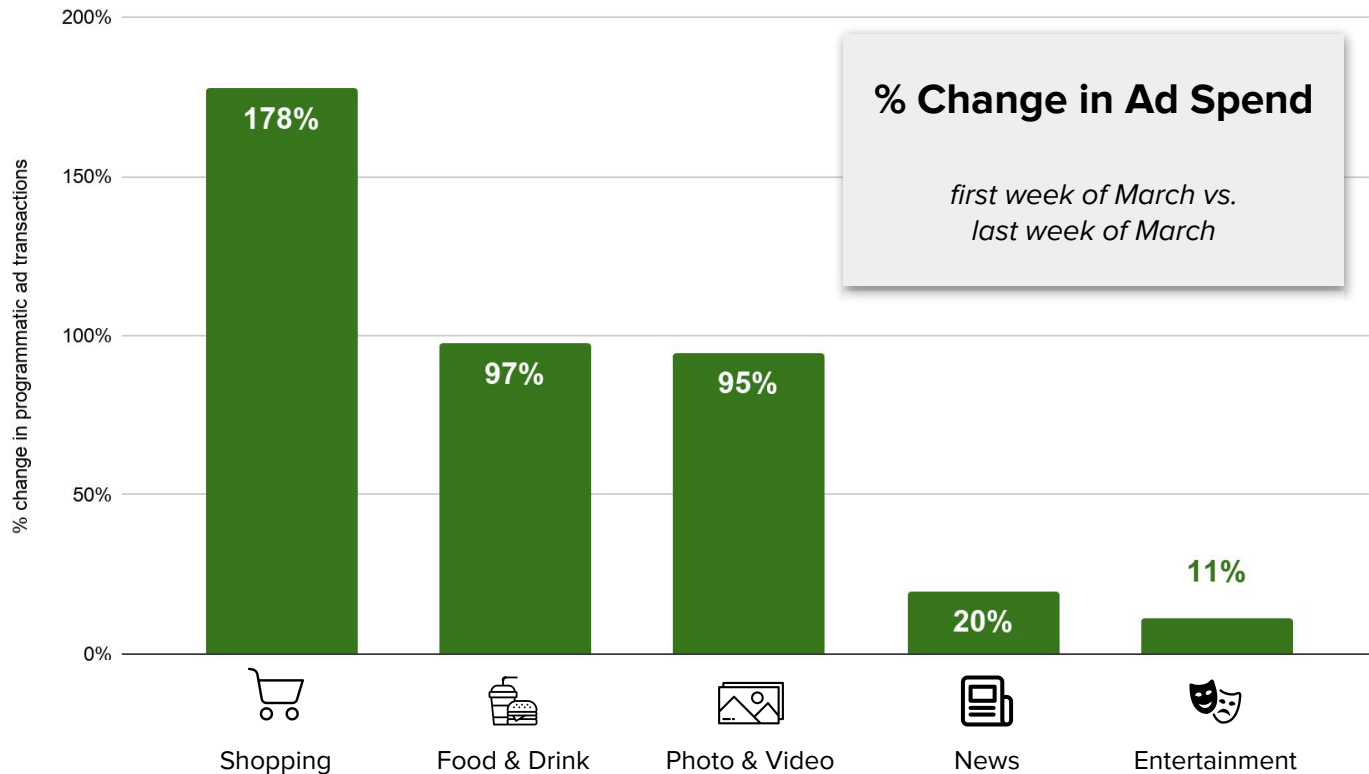
iOS: KOHL'S APP SEES 517% SURGE

PROGRAMMATIC AD TRANSACTIONS IN MARCH 2020; COMPARES FIRST FULL WEEK TO LAST FULL WEEK; AS MEASURED BY PIXALATE

Apps w/ biggest increase in ad spend, by category
first week of March vs. last week of March
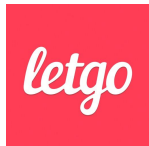
Shopping

Kohl's - Shopping & Discounts

+517%

Letgo: Sell & Buy Used Stuff

+181%

News

WKYT News

+1,635%

WBIR News

+1,434

Games

2 For 2

+747%

Crosswords With Friends

+576%

ANDROID: GAMING, SOCIAL APPS HAVE BIGGEST RISE

Icon	Title	% change (first week vs. last week of March)
	Ramp Car Jumping	+513%
	Excavator Simulator	+220%
	Wordscapes Blocks	+112%
	textPlus: Free Text & Calls	+88%
	Yazy the best yatzy dice game	+85%

Top 5 apps w/ biggest increase in ad spend

first week of March vs. last week of March

ANDROID: 'PARENTING' APP AD SPEND SOARS 122%

PROGRAMMATIC AD TRANSACTIONS IN MARCH 2020; COMPARES FIRST FULL WEEK TO LAST FULL WEEK; AS MEASURED BY PIXALATE

% Change in Ad Spend

*first week of March vs.
last week of March*

% change in programmatic ad transactions

Parenting	122%
Dating	103%
Video Players & Editors	101%
Business	62%
Auto & Vehicles	21%

ANDROID: REDDIT, 4CHAN COMPANION APPS RISE

PROGRAMMATIC AD TRANSACTIONS IN MARCH 2020; COMPARES FIRST FULL WEEK TO LAST FULL WEEK; AS MEASURED BY PIXALATE

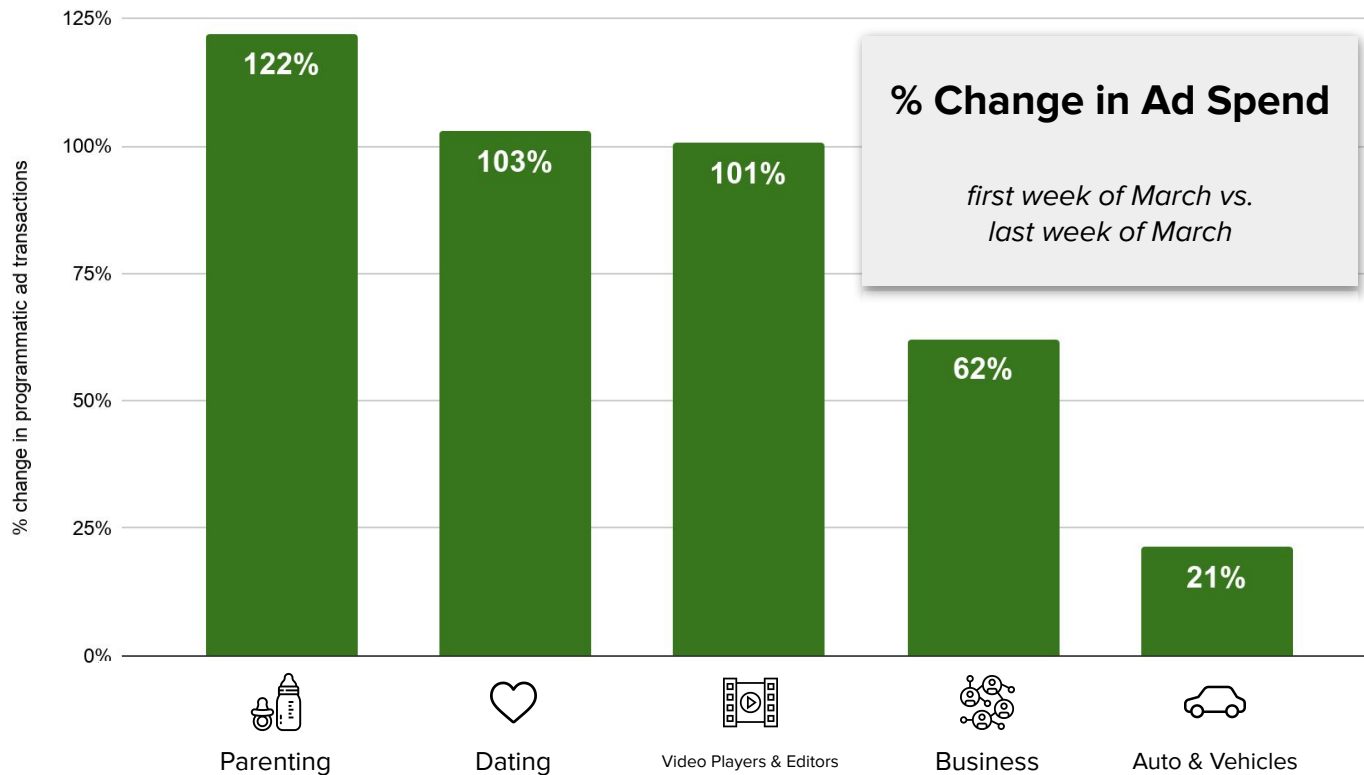## Apps w/ biggest increase in ad spend, by category
first week of March vs. last week of March

Games

Ramp Car Jumping

+513%

Excavator Simulator

+220%

Social

textPlus: Free Text & Calls

+88%

Omnichan: 4chan and 8chan Client

+3%

News & Magazines

Joey for Reddit

+66%

Univision Noticias

+35%

iOS: ESPN, NBA APPS AMONG APPS HIT HARDEST

Icon	Title	% change (first week vs. last week of March)
	Bowmasters - Multiplayer Game	-99.6%
	LOVOO ®	-99%
	ESPN: Live Sports & Scores	-99%
	Traffic Run!	-97%
	NBA: Official App	-95%

Top 5 apps w/ biggest decrease in ad spend

first week of March vs. last week of March

iOS: 'SPORTS' SEES 83% DECREASE IN AD DEMAND

PROGRAMMATIC AD TRANSACTIONS IN MARCH 2020; COMPARES FIRST FULL WEEK TO LAST FULL WEEK; AS MEASURED BY PIXALATE

% Change in Ad Spend

*first week of March vs.
last week of March*

% change in programmatic ad transactions

Category	Change
Sports	-83%
Utilities	-60%
Book	-36%
Weather	-28%
Business	-26%

iOS: ESPN, NBA APPS SEE 95%+ DECREASE IN AD SPEND

PROGRAMMATIC AD TRANSACTIONS IN MARCH 2020; COMPARES FIRST FULL WEEK TO LAST FULL WEEK; AS MEASURED BY PIXALATE

Apps w/ biggest decrease in ad spend, by category
first week of March vs. last week of March

Sports

ESPN: Live Sports & Scores

-99%

NBA: Official App

-95%

Shopping

CSmart for craigslist

-82%

Autotrader — Shop All the Cars

-67%

Health & Fitness

Sweatcoin - Sweat for Coins

-78%
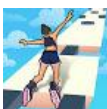
Pregnancy & Baby Tracker WTE

-54%

ANDROID: OTT CONTENT APP LOSES 99% AD SPEND

PROGRAMMATIC AD TRANSACTIONS IN MARCH 2020; COMPARES FIRST FULL WEEK TO LAST FULL WEEK; AS MEASURED BY PIXALATE

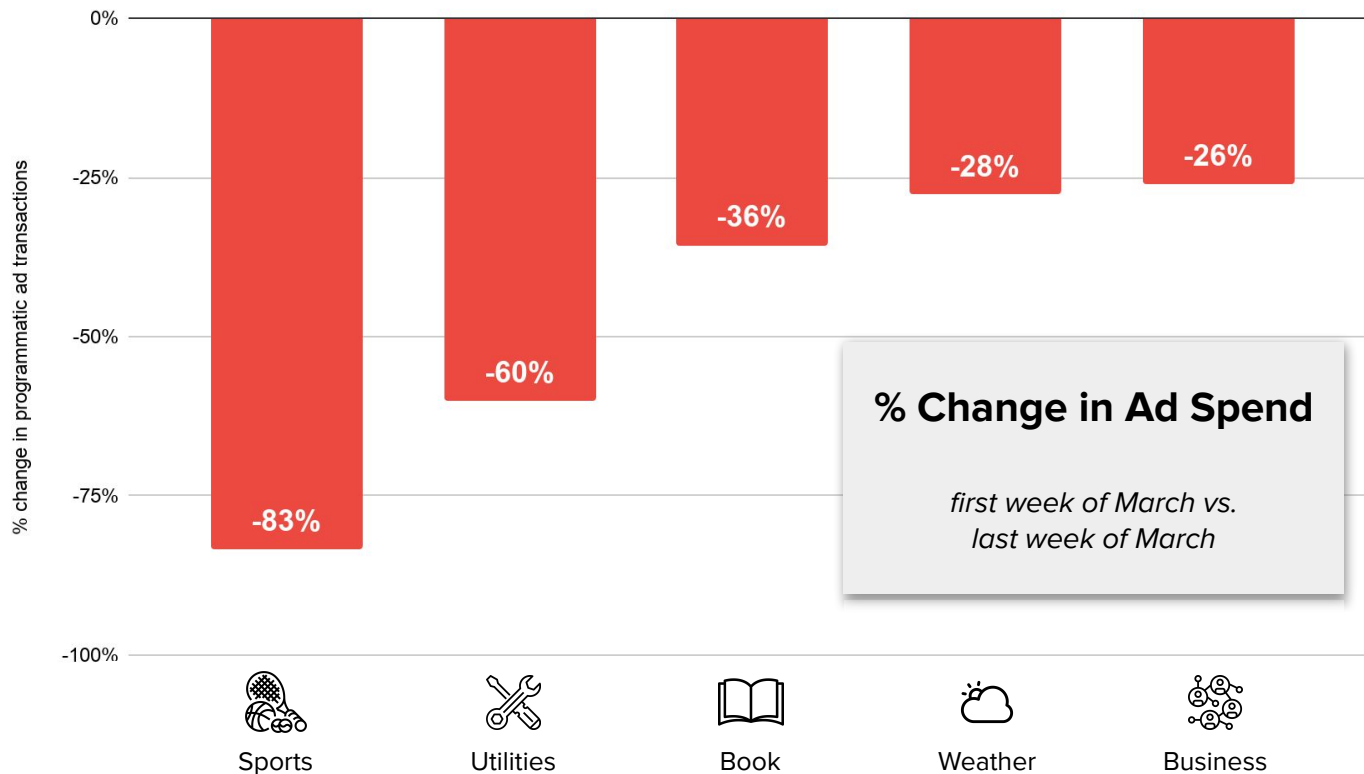| Icon	Title	% change (first week vs. last week of March)
	STIRR	**-99%**
	Drift Max Pro	**-98%**
	Sky Roller	**-98%**
	Ball Action	**-98%**
	Ice Crush 2020	**-97%**

Top 5 apps w/ biggest decrease in ad spend

first week of March vs. last week of March

ANDROID: 'MEDICAL' AD DEMAND DIPS 79%

PROGRAMMATIC AD TRANSACTIONS IN MARCH 2020; COMPARES FIRST FULL WEEK TO LAST FULL WEEK; AS MEASURED BY PIXALATE

% change in programmatic ad transactions

- Shopping: **-82%**
- Medical: **-79%**
- Comics: **-63%**
- Entertainment: **-61%**
- Education: **-50%**

% Change in Ad Spend

first week of March vs. last week of March
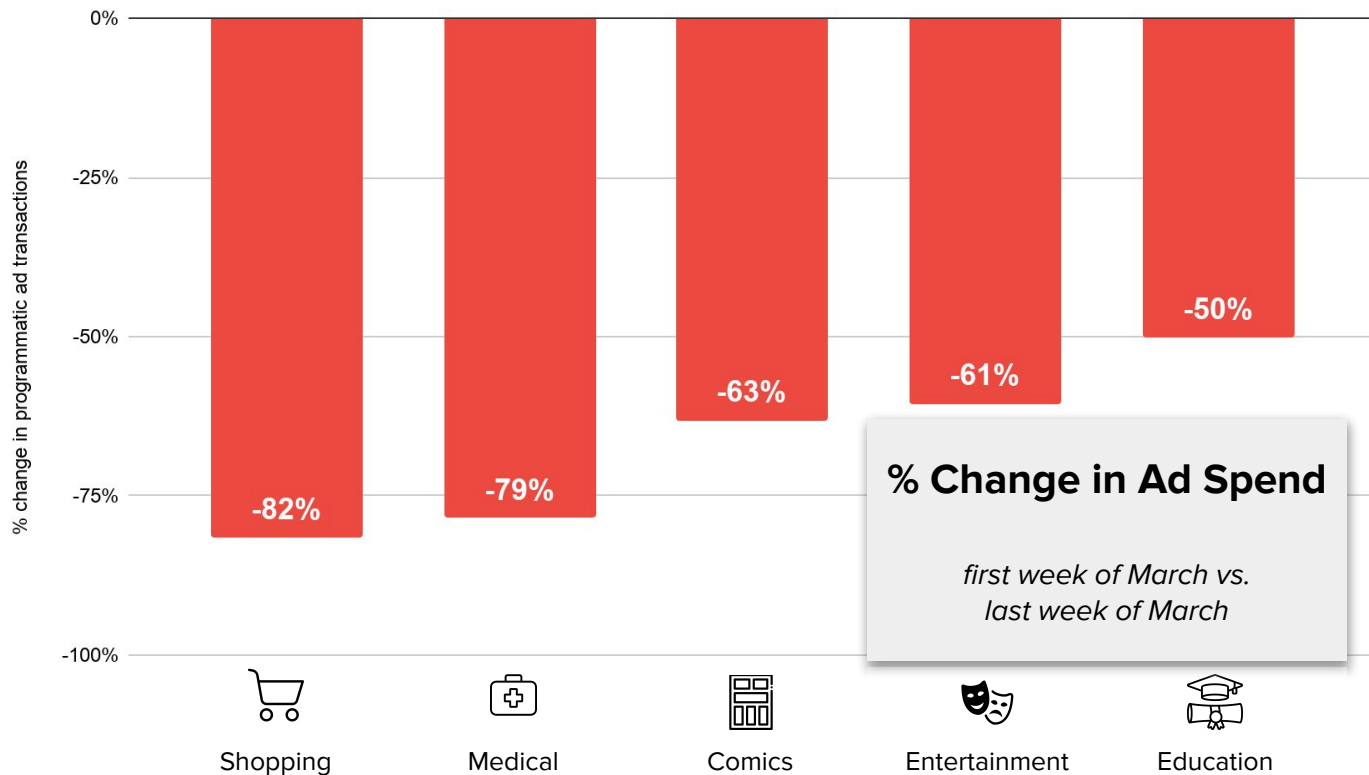
ANDROID: TUMBLR SEES 93% DROP IN AD SPEND

PROGRAMMATIC AD TRANSACTIONS IN MARCH 2020; COMPARES FIRST FULL WEEK TO LAST FULL WEEK; AS MEASURED BY PIXALATE

Apps w/ biggest decrease in ad spend, by category
first week of March vs. last week of March

Games	Social	News & Magazines
Draft Max Pro	Tumblr	12News Now - KBMT & KJAC
-98%	**-93%**	**-96%**
Sky Roller	GROWLr: Gay Bears Near You	Podcast Player & Podcast App - Castbox
-98%	**-18%**	**-70%**

iOS: 'SPORTS' & 'MEDICAL' 2 MOST VOLATILE CATEGORIES

COMPARES PROGRAMMATIC AD TRANSACTIONS IN MARCH 2020 FROM MOST AND
LEAST VOLUMINOUS WEEKS; AS MEASURED BY PIXALATE

COVID-19: Top 5 most volatile* iOS app categories

1	2	3	4	5
Sports	Medical	Shopping	Health & Fitness	Business

* "Volatility" compares the percentage difference between the most- & least-voluminous
 full weeks in March in terms of programmatic ad transactions, as measured by Pixalate

ANDROID: 'MEDICAL' MOST VOLATILE CATEGORY

COMPARES PROGRAMMATIC AD TRANSACTIONS IN MARCH 2020 FROM MOST AND LEAST
VOLUMINOUS WEEKS; AS MEASURED BY PIXALATE

COVID-19: Top 5 most volatile* Android app categories

1

Medical

2

Shopping

3

House
& Home

4

Education

5

Maps
& Navigation

* "Volatility" compares the percentage difference between the most- & least-voluminous
full weeks in March in terms of programmatic ad transactions, as measured by Pixalate

METHODOLOGY

Pixalate's data science and analyst team analyzed programmatic advertising activity across over 1.5 million apps to compile this research. The research contained herein represents data collected by Pixalate from March 1 through March 31, 2020.

In the context of this report, programmatic ad transactions, as measured by Pixalate, are used as a proxy for ad spend. The report examines U.S. advertising activity.

App category information was derived from the official Google Play Store and Apple App Store; "walled garden" apps, such as Facebook, are not included.

"First week" and "last week" of March refer to March 1-7 and March 22-28, respectively. Ad spend increases or decreases were calculated by comparing programmatic ad transactions in the first week to the last week of March.

App category "volatility" was calculated by taking the most- and least-voluminous full weeks in March in terms of programmatic ad transactions, and comparing the percentage difference between those two figures.

DISCLAIMER

The content of this report reflects Pixalate's opinions with respect to the factors that Pixalate believes can be useful to the digital media industry. Any proprietary data shared is grounded in Pixalate's proprietary technology and analytics, which Pixalate is continuously evaluating and updating. Any references to outside sources should not be construed as endorsements. Pixalate's opinions are just that, opinions, which means that they are neither facts nor guarantees.

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ABOUT PIXALATE

Pixalate is a **global ad fraud intelligence and marketing compliance platform** that works with brands and platforms to prevent invalid traffic and improve ad inventory quality. We offer the only system of coordinated solutions across display, app, video, and OTT/CTV for better detection and elimination of ad fraud.

Pixalate is an **MRC-accredited service for the detection and filtration of sophisticated invalid traffic** (SIVT) across desktop and mobile web, mobile in-app, and OTT/CTV advertising.
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